

WiredContact Enterprise

Installation Guide



WIREDCONTACT



WiredContact Enterprise Installation Guide

This guide explains how to a default install of WiredContact Enterprise.

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Chapter 1: Overview

WiredContact Enterprise is a web interface for contact management that is used with Microsoft SQL Server, Microsoft SQL Server Express and Microsoft Access.

Database Compatibility

Before continuing you should have a database available. WiredContact Enterprise does not include a database engine, so please install one of the databases below to use with the software. 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 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 friendly names for tables and fields. You may use whatever characters you wish for labels.

Recommended System Specifications

Server configurations:

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

Server specifications:

- Web server with Internet Information Server (IIS) 5, 6 or higher.
- Windows 2008, 2003 Server or 2000 with Internet Information Server (IIS) 5, 6 or higher
- For installs up to 5 users, Windows 2000 Professional or Windows XP Professional
- 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.

Web Server	Recommended	Minimum
Processor	3.0 GHz or faster Pentium or Intel Xeon	2.2 GHz Pentium IV
Ram	1 GB or more	1GB
Hard Drive space*	100 GB or more	40 GB

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

User specifications:

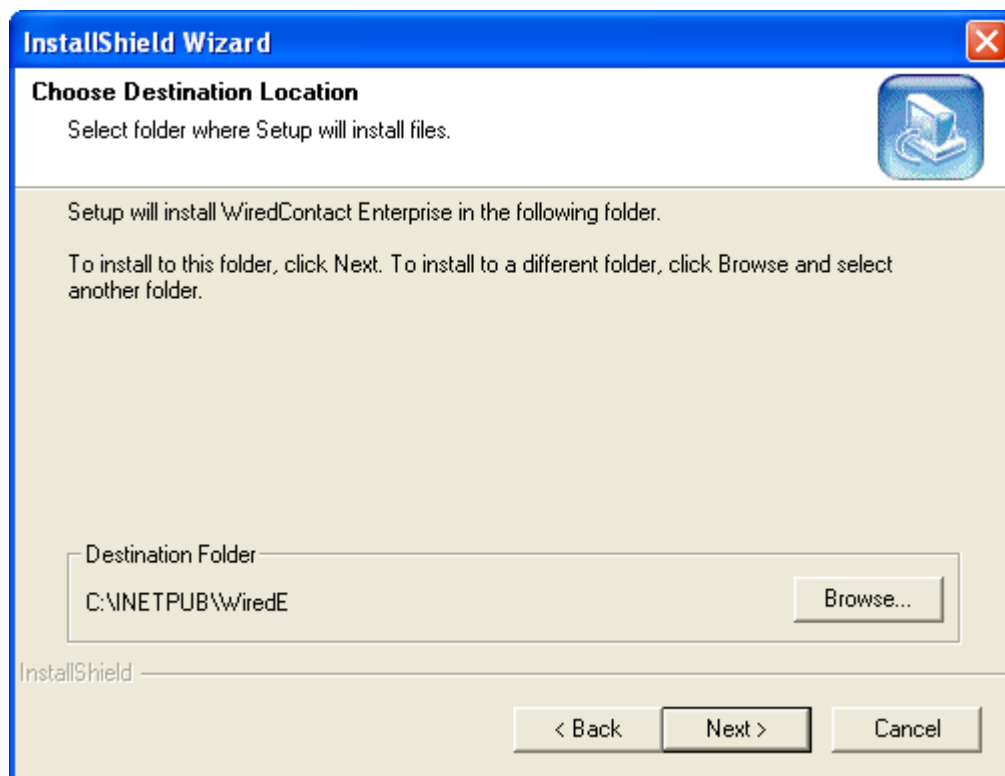
- Microsoft Internet Explorer, version 5.0 or higher (PC or MAC) or Mozilla Firefox
- Internet Connection

Chapter 2: Installing WiredContact Enterprise (WCE)

Step 1: Install the Software

Download the latest version of WiredContact Enterprise from <http://www.wiredcontact.com/downloadse.htm>. Choose the WiredContact Enterprise 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 Virtual Directory - IIS Control (Website Setup)

You will need to create a new Virtual Directory to the Default Web Site for your site using the Virtual Directory Creation Wizard.

Right mouse click on My Computer > Manage > expand Services and Applications > expand Internet Information Services > expand Web Sites > select Default Web Site > right mouse click – select New > select Virtual Directory. The Virtual Directory Creation Wizard is displayed.

Click Next to page through the Wizard.



3. Select an Alias name. This will be the name of your site. The default is **Wirede**
4. Enter the path to the directory that contains your WiredContact site
5. Under Allow the Following Permissions, Read is checked.

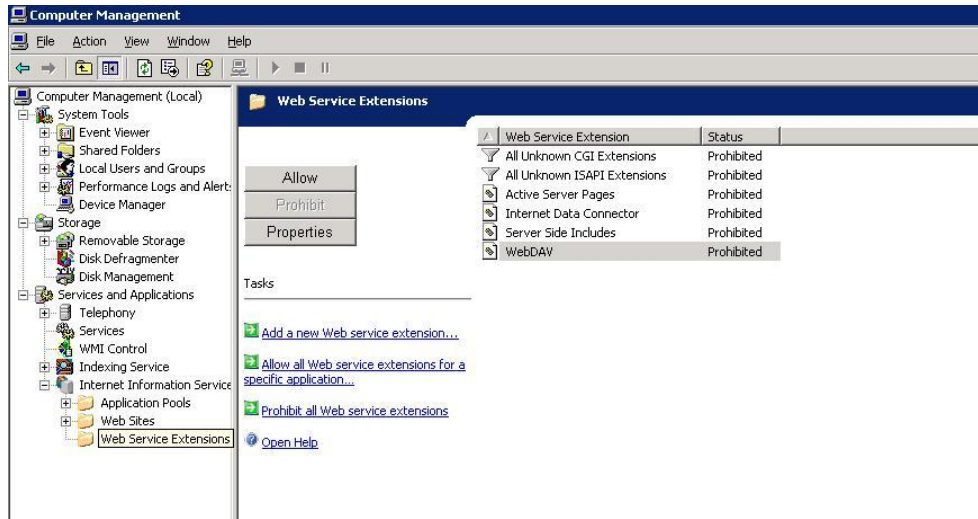
- a. Checkbox Run and Execute.
6. When complete, right mouse click on the Virtual Directory you just created. Select **Properties**.
7. Uncheck Log Visits and Index this Site.
8. Change the **Application Pool** to the one you just created. Click OK.
9. Click the **Documents** tab, remove all, add wceweb.dll.
10. Click the Directory Security tab, Edit button, uncheck Windows Integrated Authentication.
11. Browse to the IUSER and select it.

Using Windows 2003 Server

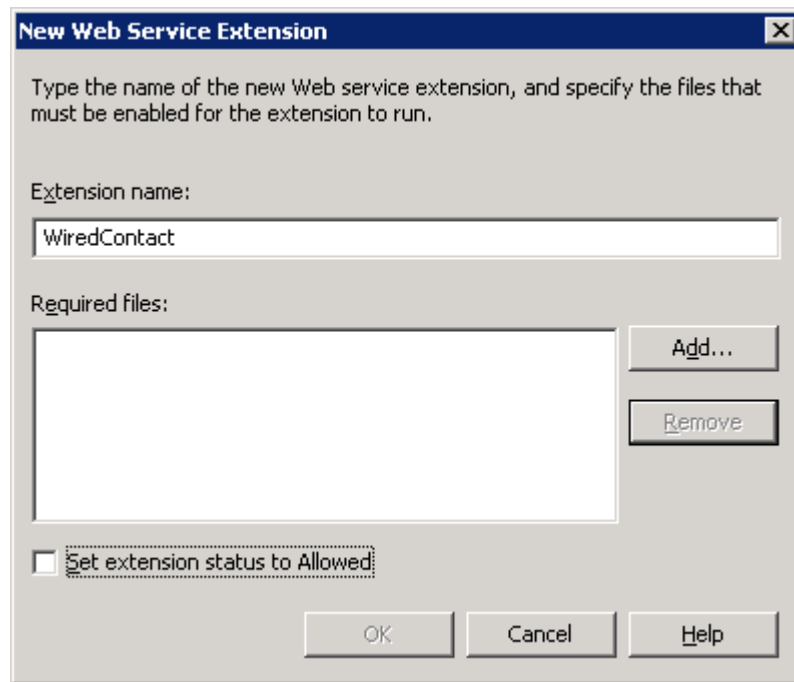
Adding Web Extensions

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

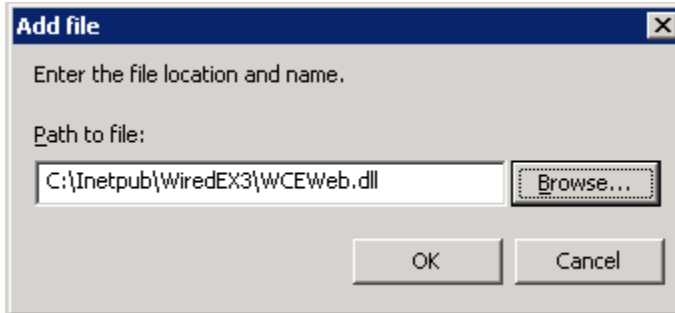
12. In the *Computer Management* screen, locate Internet Information Services.
13. Navigate to a sub-folder called *Web Service Extensions*
14. Select Add a new Web service extension



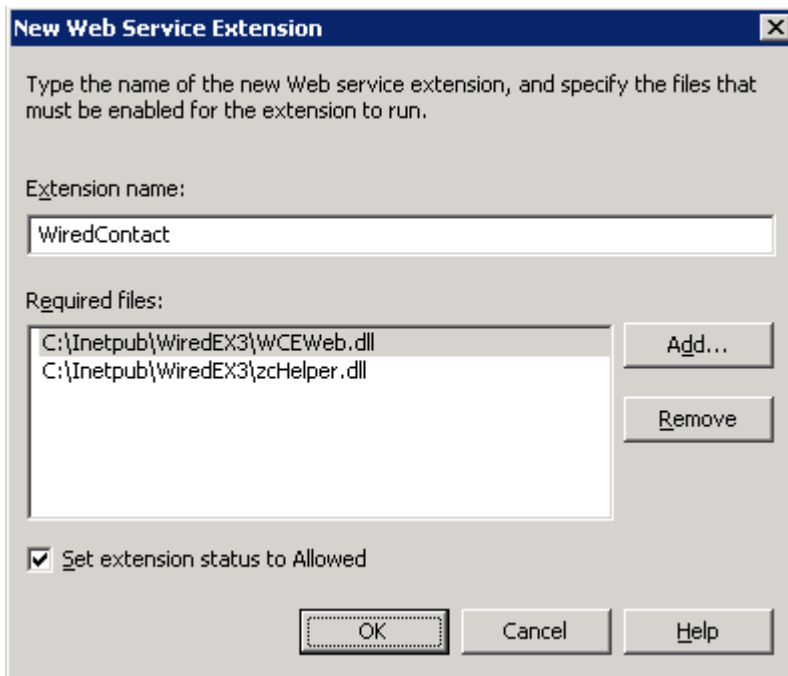
15. Enter WiredContact as the Extension name.



16. Select the *Add* button.



17. Individually add **WCEWeb.dll** and **zcHelper.dll**.
18. Point each extension to the WiredContact install folder.
(for example - C:\Inetpub\WiredEx3\WCEWeb.dll)
19. Select Set Extension Status To Allowed for each file.



Create a new Application Pool (for Windows 2003 server)

20. You will need to create a new Application Pool for your site.

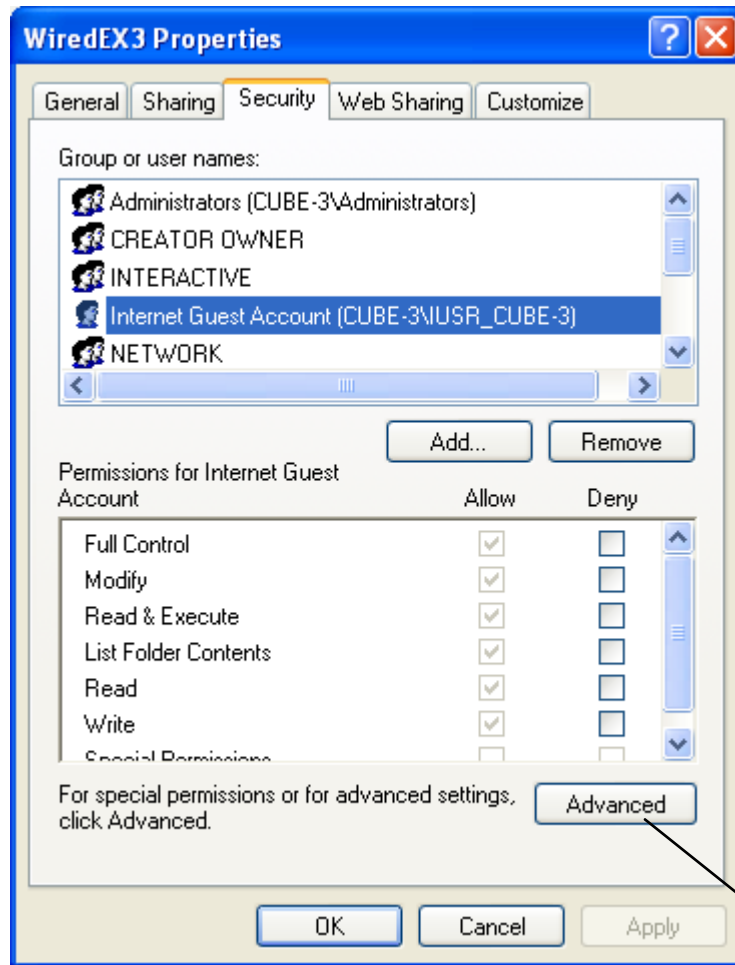
21. Right mouse click on My Computer > Manage > expand Services and Applications > select Application Pool > right mouse click on Application Pool > select New > Application Pool.

22. Name your Application Pool, click OK.

Step 3: Configure IIS

It is necessary to enable the IUSR_ security permissions for the WiredContact installation folder and database folder.

23. Navigate to the WiredContact installation folder. (C:\inetpub\Wirede)
24. Right-click on the folder and select Properties.
25. Select the Security tab.
 - b. Add the IUSR_ account
 - c. Give the IUSR_ Full Control
26. Select the Advanced button.
 - d. Check the box to Replace Permission Entries On All Child Objects
27. 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 using the file called ***Install WiredContact Service.bat***.

28. 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: WiredContact Enterprise Administration

Overview

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

To reach the 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) 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

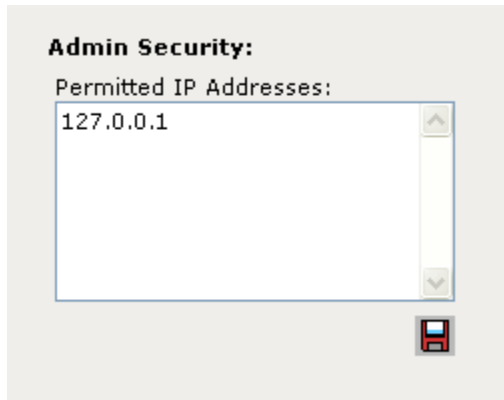
The following chapters will cover each of the functions listed above.

Admin Security

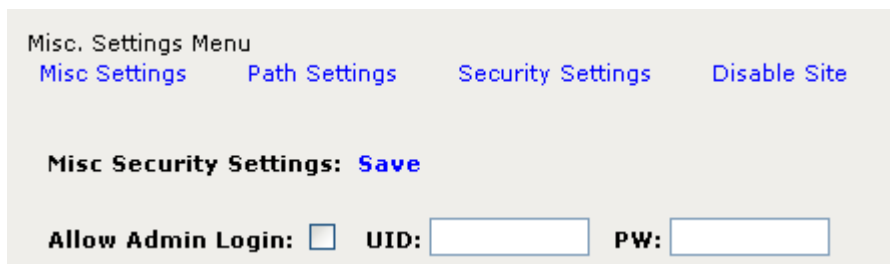
The Administrative Console is accessible on the server where Enterprise is installed. (Users will not see the Admin link on their views).

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)

29. **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.



30. **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**.
- e. Check the box that reads **Allow Admin Login**.
 - f. Enter a user ID and password.
 - g. Click the **Save** link to set the UID/PW information.
 - h.



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) 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.

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).

31.

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

32.

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

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

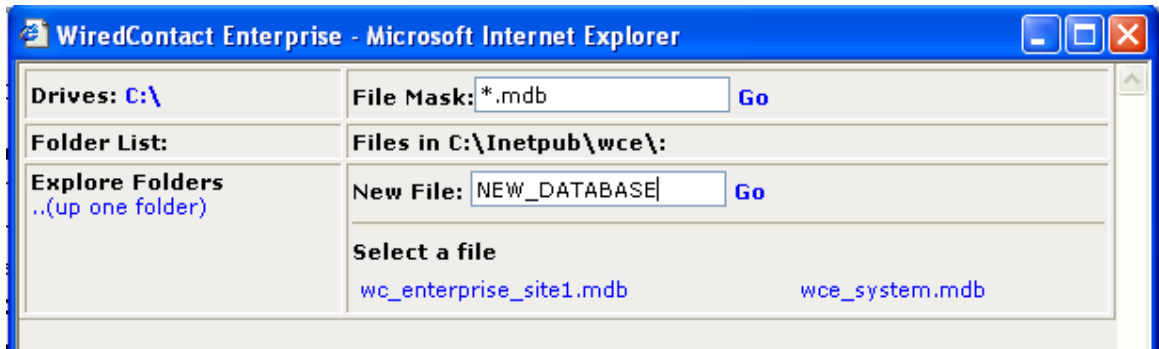
Using MS ACCESS (Desktop Database Types)

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

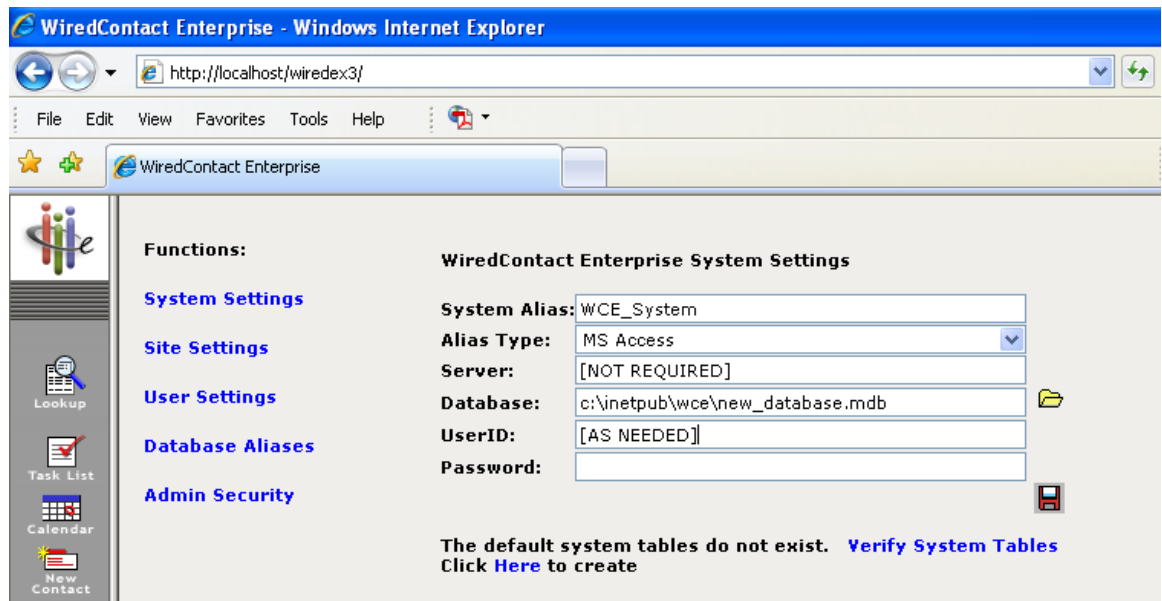
System Alias:	<input type="text" value="WCE_System"/>
Alias Type:	<input type="text" value="MS Access"/>
Server:	<input type="text" value="[NOT REQUIRED]"/>
Database:	<input type="text" value="c:\inetpub\wce\new_database.mdb"/> 
UserID:	<input type="text" value="[AS NEEDED]"/>
Password:	<input type="password"/>



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 and MS SQL Server Express are server based database engines.

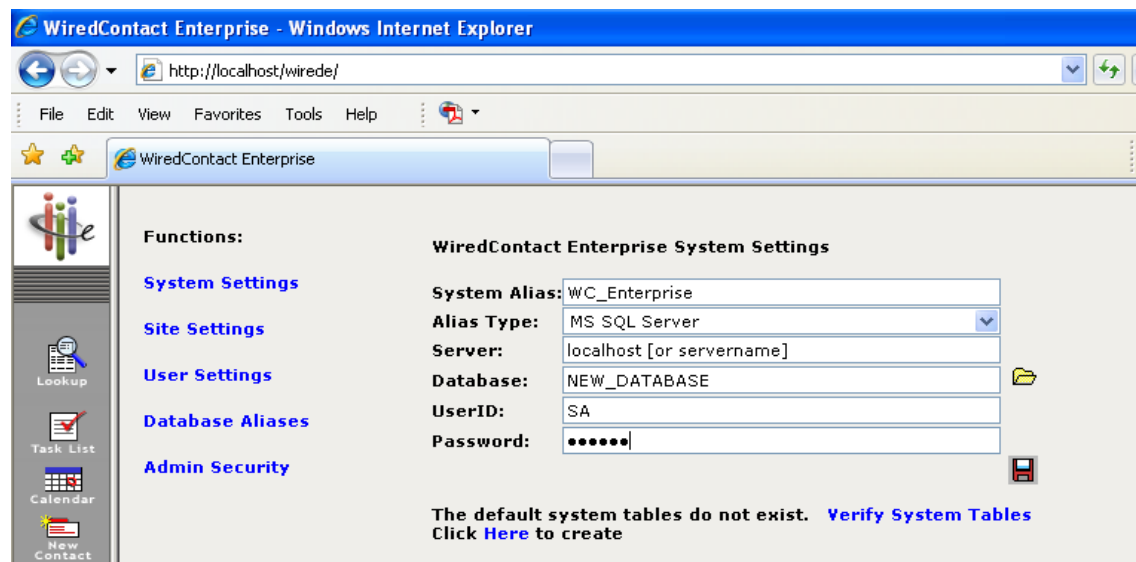
Server – Set this to the server where your database server resides. Consult your database server documentation for more information.

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.


Password – Fill in the password for the above UserID.



The screenshot shows the 'WiredContact Enterprise System Settings' page. The browser title is 'WiredContact Enterprise - Windows Internet Explorer' and the address bar shows 'http://localhost/wirede/'. The page has a navigation sidebar 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 the following fields:

- System Alias:** WC_Enterprise
- Alias Type:** MS SQL Server (dropdown menu)
- Server:** localhost [or servername]
- Database:** NEW_DATABASE (with a folder icon to the right)
- UserID:** SA
- Password:** [masked with dots]

At the bottom right of the form area, there is a 'Save' icon (a floppy disk). 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

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



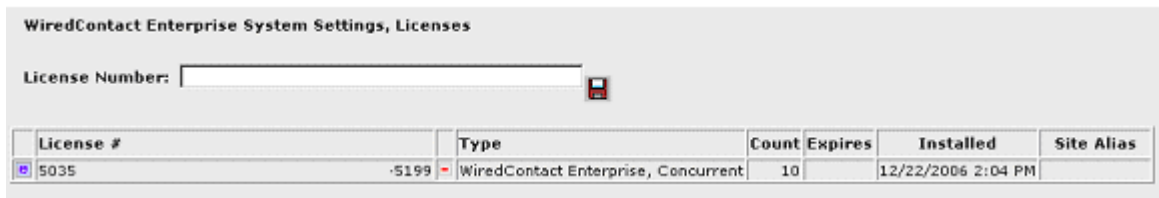
Once you have confirmed your email settings, continue with the configuration of license information.

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 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.

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 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). 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).

33.

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.

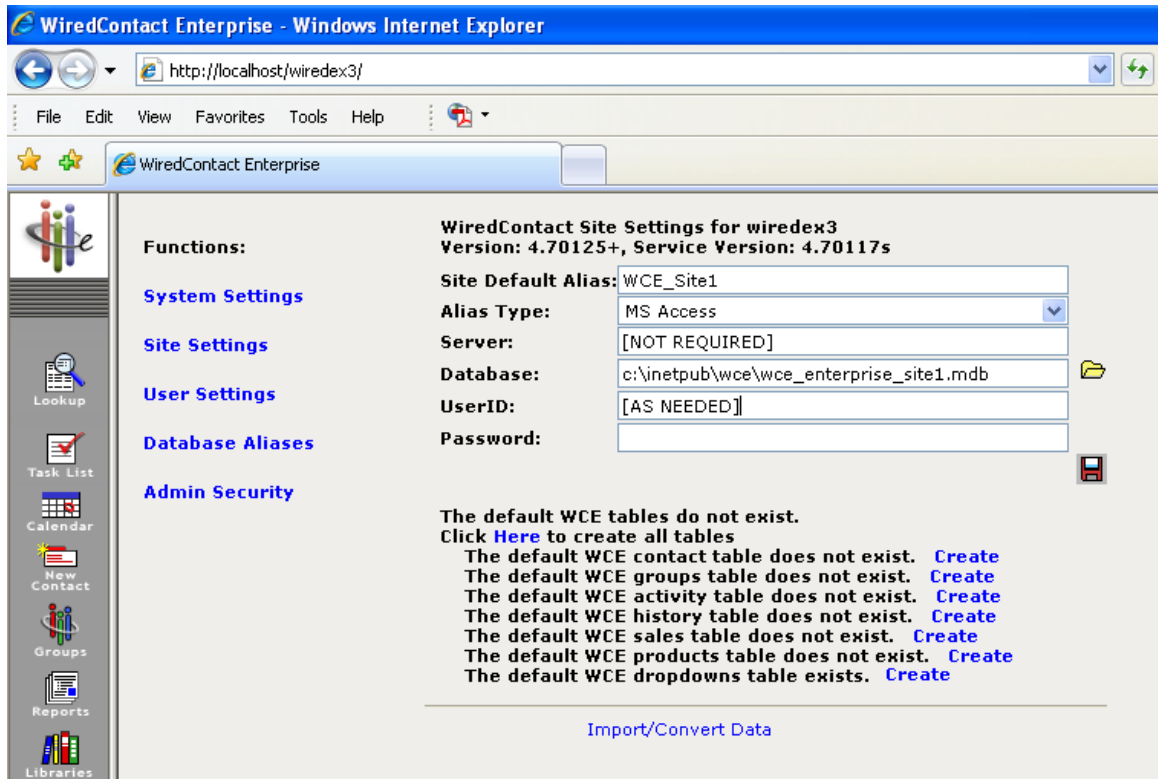
To select or create a new MS Access file, click on the folder icon and a separate window will open. On the left hand side of the window, navigate to the physical folder location where the new database will be located. This will populate the path to the folder on the right hand side. Select an existing 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. A screen will display similar to the one below.



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 are server based database engines.


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

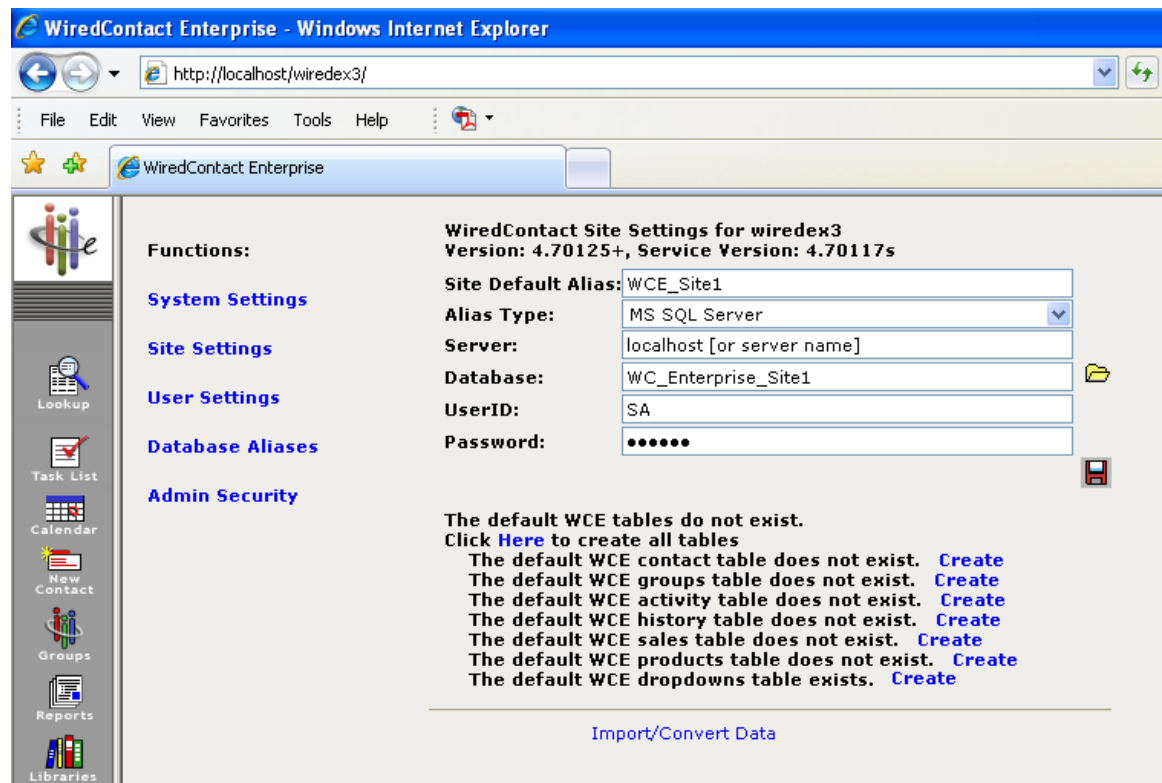
Database – Type in the name of the database on the server specified above. To view a listing of the databases located on the server specified above, click on the *Folder* icon to view them.

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.

Password – Fill in the password for the above UserID.

Once the above settings are filled out, click the Save  icon. A screen will display similar to the one below.



The screenshot shows the WiredContact Enterprise web application interface in a Windows Internet Explorer browser window. The address bar shows the URL `http://localhost/wiredex3/`. The page title is "WiredContact Enterprise". The main content area is titled "WiredContact Site Settings for wiredex3" and "Version: 4.70125+, Service Version: 4.70117s". The settings are as follows:

Site Default Alias:	WCE_Site1
Alias Type:	MS SQL Server
Server:	localhost [or server name]
Database:	WC_Enterprise_Site1
UserID:	SA
Password:	••••••

Below the settings, a message states: "The default WCE tables do not exist. Click [Here](#) to create all tables". A list of tables with "Create" links is provided:

- 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](#)

At the bottom of the page, there is a link for "Import/Convert Data". The left sidebar contains navigation icons for Lookup, Task List, Calendar, New Contact, Groups, Reports, and Libraries.

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

Site Tables – All Database Types

NOTE: Creating Site tables is not recommended when converting an ACT! database. If you are converting an ACT! database, please read the “WiredContact Enterprise Upgrade Installation Guide” for further instruction.

Once the Site Alias has been setup correctly, you will need to create the Site tables. If a default site table does not exist, you will see a message indicating the missing table with a “Create” link to the right of that message. Once created, you will see a similar message with a “Vrfy” link to the right of that message. If any of the Site tables have not been created, you will have the option of creating all of the tables via the “Click [Here](#) to create all tables” link.

Once the tables are created, a listing of specific site tables will follow with a [Vrfy](#) link next to them. Click the [Vrfy](#) if you have deleted fields in the table and you want them recreated.

Once the default site tables are created, you will see a listing of them. Once this list is displayed, continue with the site configuration.

NOTE: Clicking on the site tables displays a separate window with a listing of fields. Field attributes (including drop down contents, drop down type, field label, and field usage) can be modified from this dialog. For additional information regarding the field list, please refer to the section called Understanding Site Tables and Fields in WiredContact Enterprise in the WiredContact Enterprise Admin Configuration Guide

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 exist.
 The default WCE contact table exists. [Vrfy](#)
 The default WCE groups table exists. [Vrfy](#)
 The default WCE activity table exists. [Vrfy](#)
 The default WCE history table exists. [Vrfy](#)
 The default WCE sales table exists. [Vrfy](#)
 The default WCE products table exists. [Vrfy](#)
 The default WCE dropdowns table exists. [Vrfy](#)

Tables for Database Alias WCE_Site1:

wce_activity	wce_attachment	wce_contact	wce_dropdowns
wce_groups	wce_history	wce_linkto	wce_products
wce_sales			

Security Profiles Type Settings Misc Settings Locale Import/Convert Data
 Table Defaults Table Deletes Trouble Shooting ACT! Table Translations

Database Import

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

Import/Convert Data Menu

[Convert ACT! Database](#)

[Import Text Data](#)

[Import Data from Database](#)

This guide will focus on “Import Text Data” and “Import Data From Database”. For additional information about converting an ACT! database, please read the *WiredContact Enterprise Upgrade Installation Guide* for further instruction.

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: 4.61217+, Service Version: 4.61217s Next

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

2. **Import File:** C:\Documents and S [Browse...]

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

4. **Delimiter:** [, [dropdown] +

5. **Default Record Manager:** Chris Huffman [dropdown] (Required)

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

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

Additional table [dropdown showing wce_activity] [dropdown showing SubEntity] (optional)

Additional table [dropdown showing wce_history] [dropdown showing SubEntity] (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.

WiredContact Enterprise - Import Utility
Version: 4.61217+, Service Version: 4.61217s
Prev
Import

1. Import Map:

2. Import File: ImportFile-1.csv

3. First Row Labels: No

4. Delimiter: ,

5. Default Record Manager: Chris Huffman

6. Default Country Code: +1

7. Entity
 SubEntity **wce_contact (Entity)**
 SubEntity **wce_activity (SubEntity)**
 SubEntity **wce_history (SubEntity)**

Import Field	Key	Field	Example Data	Example Data	Example Data
Field1	<input type="checkbox"/>	Contact	Tiny Town Productions	CH Gourmet Gifts	Searchlight Casting
Field2	<input type="checkbox"/>		Ashley Allan	Ernst Anderson	Garcia Anderson
Field3	<input type="checkbox"/>		2131 W. Tiny Rd.	552 Everett Ave.	1965 Golden Rd.
Field4	<input type="checkbox"/>		Suite 200		Cumberland Mine
Field5	<input type="checkbox"/>				
Field6	<input type="checkbox"/>		Scottsdale	Palo Alto	Eugene
Field7	<input type="checkbox"/>		AZ	CA	OR
Field8	<input type="checkbox"/>		85028	94303	97402
Field9	<input type="checkbox"/>		Customer	Coworker	Friend
Field10	<input type="checkbox"/>		480-555-2121	415-555-2909	541-555-3323

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.

- **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:

34. A table name matching the WCE User table (wces_users)
35. A column (named wce_uid) with the username as it appears in WiredContact Enterprise.
36. 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.

4. User Map Data (Optional):

Alias Name:	<input type="text" value="WCE_Users"/>
Alias Type:	<input type="text" value="MS Access"/> ▼
Server:	<input type="text" value="localhost"/>
Database:	<input type="text" value="WCE_Users"/>
UserID:	<input type="text" value="[as needed]"/>
Password:	<input type="text"/>
Database Status:	<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 Next
Version: 4.70117+, Service Version: 4.70117s

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

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

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

Alias Name:

Alias Type:

Server:

Database:

UserID:

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

Prev Import

1. **Import Map:**

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

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

Alias Type: MySQL

Server: localhost

Database: wce_site1

UserID: root

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 3rd 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



Page 1