

WiredContact Enterprise x3

Admin Guide



WIREDCONTACT

WiredContact Enterprise x3 Admin Guide

Overview

WiredContact Enterprise x3 (WCE) is a web solution for contact management/sales automation that is currently available for installation with Microsoft SQL Server, Microsoft SQL Server Express, Microsoft Access, MySQL, and other database platforms.

WiredContact Enterprise uses database conversion/import tools that will convert/import data from several sources for use in WiredContact Enterprise, including text (.txt/.csv), Microsoft Access, SQL (various platforms) and ACT! 4, 5 and 6. The import tools have many sophisticated features that include complex duplicate checking and multiple table imports.

For upgrading from WiredContact for ACT!, the ACT! conversion tool handles all of the ACT! data, and the graphical interface for WiredContact Enterprise can use the same HTML templates as WiredContact for ACT! (WCA X3 and WCA PPC templates automatically – WCA Classic templates with some additional effort). Customizations made in WiredContact ACT! (WCA) are preserved for customers upgrading to WiredContact Enterprise.

For additional information about the installation of WCE, please see the documents *WiredContact Enterprise x3 Installation Guide* (for new installations) and the *WiredContact Enterprise x3 Upgrade Guide* (for ACT! database conversions).

WiredContact Enterprise Configuration

WiredContact Enterprise has a flexible architecture and supports several open architecture databases that allow for immediate benefits:

- Enhanced security facilities enabling table and field level security.
- Record level security by table by user or team of users
- Sophisticated field types, relations, and functions.
- More comprehensive user configuration.
- Consolidated site configuration.

In order to access the Administrator console, click on the “Admin” link located toward the bottom of the sidebar when accessing the site from the web server. The admin sidebar menu will show to the right of the application sidebar, on the left hand side of the screen.

System Settings

Functions:


- [System Settings](#)
- [Site Settings](#)
- [User Settings](#)
- [Database Aliases](#)
- [Admin Security](#)

WiredContact Enterprise System Settings


System Alias:

Alias Type:

Server:

Database: 

UserID:

Password: 

The default system tables exist. [Verify System Tables](#)

Tables for Database Alias New WiredE System:

[wces_lastip](#) [wces_security](#) [wces_settings](#)

[wces_users](#)

[Email Server](#) [License Information](#) [Other Server Settings](#)

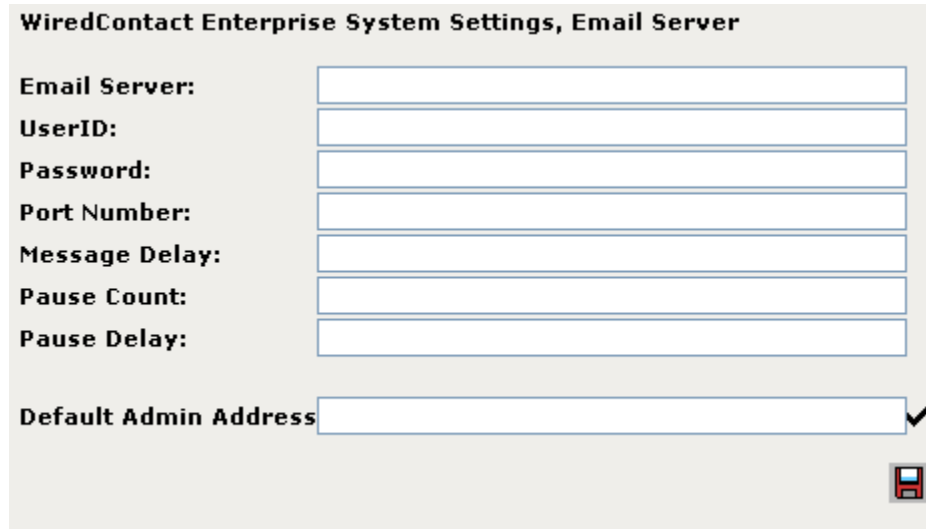
Navigation

Click on the System Settings link to display the Systems Setting main page. The System Alias Information would have been completed during installation. If you do not have your System Alias setup correctly, please consult your installation guide.

The System Settings configuration items are shown along the lower portion of the System Settings main page.

Email Server

WiredContact uses an email (smtp) server to relay messages from individual users to individual contacts in the database, as well as to groups of contacts (via the WiredContact Service Application). You set the email (smtp) server by clicking the Email Server link from the main System Settings page. The email server information will display below the link.



The screenshot shows a web form titled "WiredContact Enterprise System Settings, Email Server". It contains several input fields for configuration:

- Email Server:** A text input field.
- UserID:** A text input field.
- Password:** A text input field.
- Port Number:** A text input field.
- Message Delay:** A text input field.
- Pause Count:** A text input field.
- Pause Delay:** A text input field.
- Default Admin Address:** A text input field with a checkmark icon to its right, indicating it is the default.

At the bottom right of the form is a "Save" button, represented by a floppy disk icon.

The Email Server field is the address of the email server that will be responsible for relaying email from the WiredContact server (via the web server or the WiredContact Service Application). If your email server requires a userid/password for relaying email, enter that here as well.

If your email server uses a port other than 25, enter that in the Port Number field. Then press the Save button at the bottom.

The Default Admin Address is used primarily for validating the connection. When the test button (check mark next to the Default Admin Address) is pressed, a test email is sent to the this address. If no address is specified – the test email is sent to support@wiredcontact.com.

The other email fields are used when sending out mass emails via the WiredContact Service. If your email server will not accept a continuous stream of emails – enter the Message Delay (in milliseconds – time between emails), Pause Count (number of emails sent before the Pause Delay is activated), Pause Delay (in seconds – time to pause between Pause Counts)

License Information

WiredContact utilizes four types of user licenses:

- **Named** – used for users that are designated as Named users. The number of users designated as Named users must be less than or equal to the number of Named licenses you have installed. If do not have enough Named user licenses for all of your Named users – none of your Named users will be able to log in.
- **Concurrent** – used for users designated as Concurrent users. You may have more users designated as Concurrent users than the number of Concurrent user licenses installed. But the number of Concurrent users currently logged on must be less than or equal to the number of Concurrent licenses installed. You must train your Concurrent users to use the Log Off feature when they are through with their session to free up the Concurrent license they were using.
- **Named/Expires** – this is a Named license that works exactly like the standard Named license, except that it ceases to be valid on a specific date. Expiring licenses are good for evaluation periods, for temporary employees, or for renting the software instead of buying it.
- **Concurrent/Expires** – this is a Concurrent license that works exactly like the standard Concurrent license, except that it ceases to be valid on a specific date. Expiring licenses are good for evaluation periods, for temporary employees, or for renting the software instead of buying it.

You may use any combination of WiredContact Enterprise licenses. Multiple Concurrent, Named, and Expiring licenses can coexist on the same WiredContact Enterprise. When a Named license expires, you will need to transition enough users to Concurrent users, or inactive users, to put the number of active Named users below the number of valid Named User licenses installed.

Additional WiredContact Enterprise licenses, such as ZipCode Connection, and the WiredContact Enterprise Email client, are entered in the License Information section. To add a license, paste or type the license number into the License Number field and press the Save icon. The license number and description will show after you press the Save icon. To delete a license, press the delete icon.

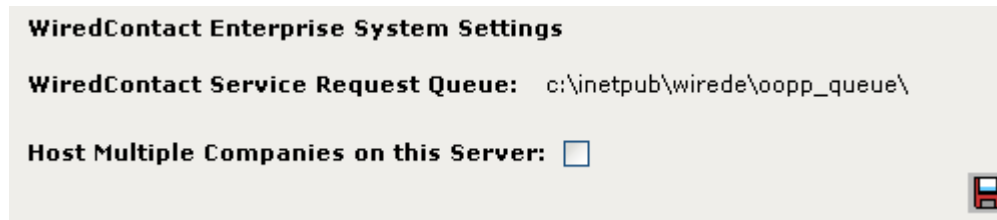
WiredContact Enterprise System Settings, Licenses

License Number: 

License #	Type	Count	Expires	Installed	Site Alias
 0039-6172	WiredContact Enterprise, Named/Expires	3	2/9/2007	1/26/2007 4:16 PM	
 6046	WiredContact Enterprise, Concurrent/Expires	3	2/9/2007	1/26/2007 4:16 PM	

Other Server Settings

The Other Server Settings section displays additional server options. Additional Server options may appear here as they are added to WiredContact Enterprise



WiredContact Service Request Queue

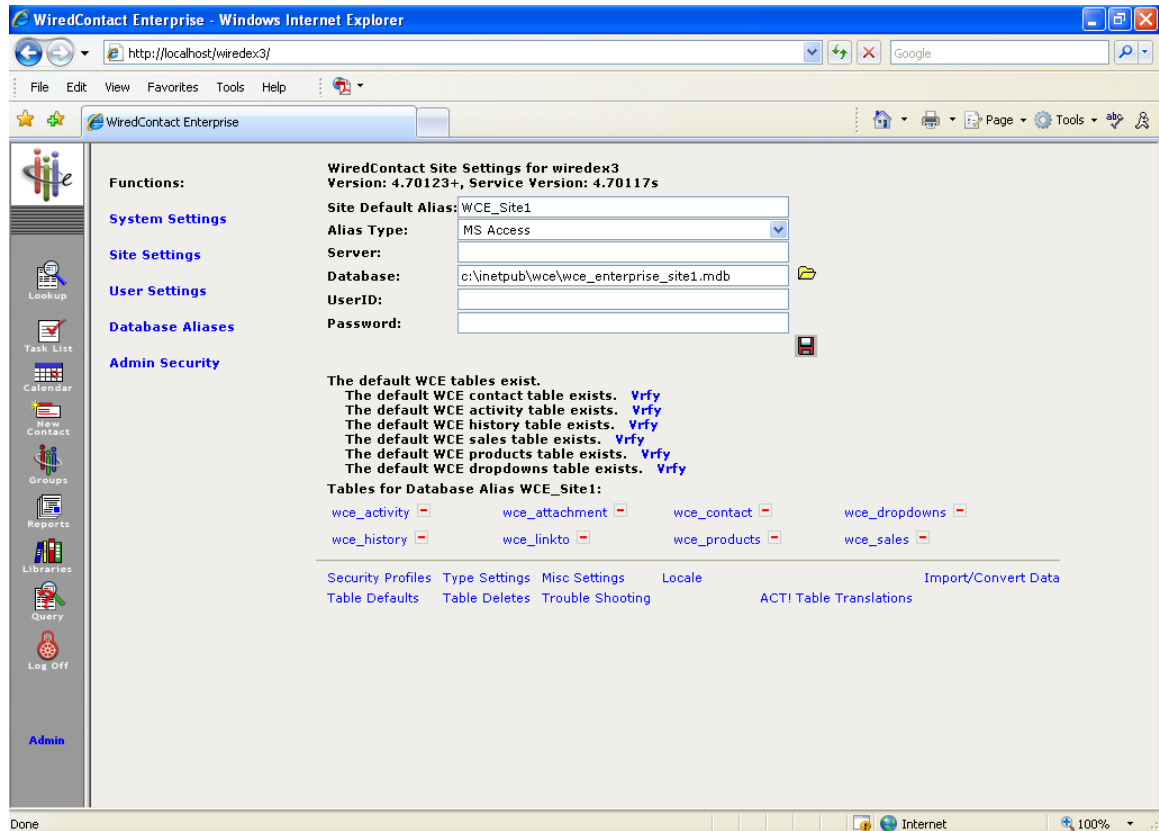
The WiredContact Service uses a messaging queue that is utilized by all sites on the server. The location of the WiredContact Service Request Queue has no significant impact on the user interface or any other aspect of WiredContact. The only consideration you may need to be aware of is that each site will place files into the queue as service requests are made, and the WiredContact Service Application will retrieve and process the requests. If the file security of the queue folder itself, or the user permissions of the Sites or the WiredContact Service are insufficient for the placement and retrieval of these requests, the WiredContact Service functions may fail. These functions include Reports, mass communication (email, mail merge) and imports.

The location of the WiredContact Service queue is set when a user logs into a site for the first time. If the queue has not already been located, it will be created in the physical folder for that virtual directory.

Host Multiple Companies

If you are a hosting company and you wish to host several WiredContact Enterprise sites on your server, then you would need to check this box. When checking this box, all users will be tied to a specific site only, and you will need multiple licenses to support access to the same database from two different sites, such as an X3 template site, and a PDA/PPC template site.

Site Settings



Navigation

Click on the Site Settings link to display the Site Setting main page. The Site Alias Information would have been completed during installation. If you do not have your Site Alias setup correctly, please consult your installation guide.

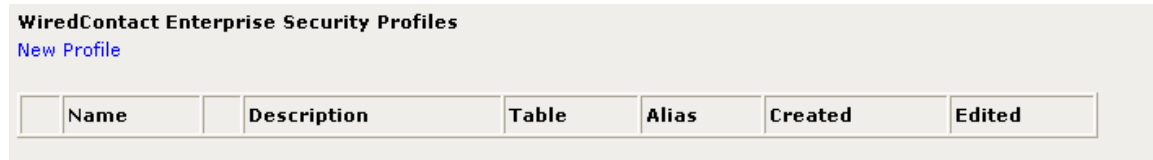
The Site Settings configuration items are shown along the lower portion of the Site Settings main page:


- Security Profiles – Field level security attributes by table. After you setup Site Security Profiles, they may be assigned to User Security Profiles.
- Type Settings – Default types for completing activities, histories, and other WiredContact Enterprise actions.
- Misc Settings – Miscellaneous settings, like the Idle Timeout and the Alarm Refresh rate, Path settings for Library and attachments, Admin password for remote admin for this site, the Disable Site page, and the Site Messages page.
- Locale – for the regional date/time settings.
- Import/Convert Data
- Table Defaults – establishing the default attributes for table behavior
- Table Deletes – establishing the cascading delete rules for tables
- Trouble shooting – many trouble shooting tools
- ACT! Translation Table – translating ACT! field numbers to WiredContact field names – allows old WiredContact for ACT! templates to be used.

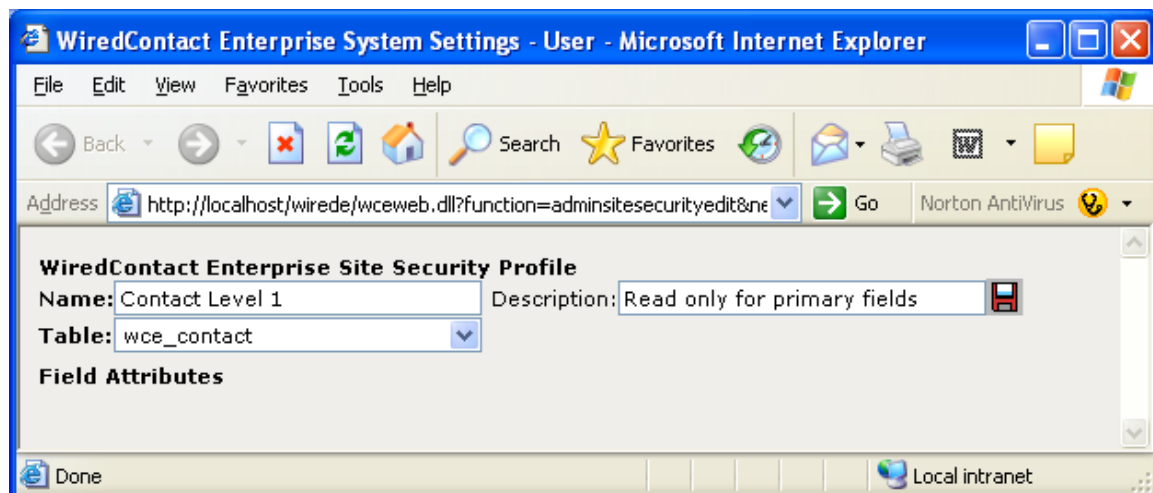
Security Profiles

Site Security Profiles are field level security attributes (No Access, Read Only, Full Access) that can be applied to every table. Once Site Security Profiles are created for any specific table, they can be assigned to a User Security profile for the same table.

To create a new Site Security Profile, click on the New Profile link



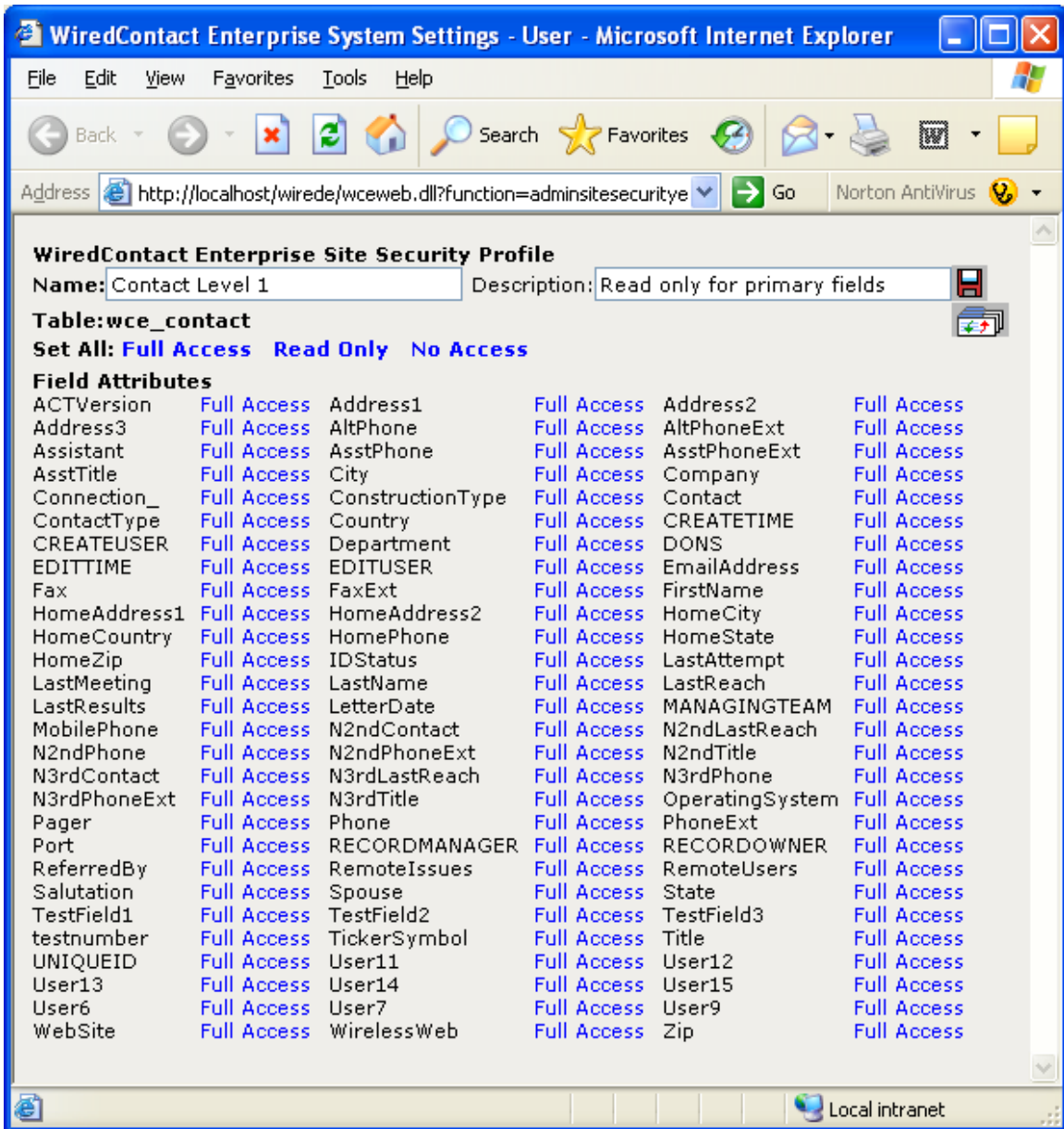
A separate window will open for the new profile. In the Profile Name, type a name the you will be able to identify it with, then in the Description field, type a short description for the profile. Finally, select the table that the profile will apply to and click on the “Save”  icon.



The window will then refresh with all the fields for that table, followed by the current security attribute for that field. To change an attribute, simply click on the attribute to the right of the field name. The attributes cycle between Full Access, Read Only, Deny Access as you click on them.


To change all of the field attributes to a specific attribute, click on one of the “Set All” labels at the top under the table name.

You can also copy a profile by clicking on the Copy icon underneath the Save icon. This will create an exact copy of the profile, with the name changed to “Copy of <profile name>”.



Type Settings

WiredContact Enterprise type settings represent the default values set for history types, sales types and activity type completed defaults. These type settings reflect how the information will be viewed throughout the application and can be changed as desired.

Click the “Save”  icon at the bottom of the page after changes have been made.

Site History Types:


Field Changed:	<input type="text" value="Field Changed"/>	Email Sent:	<input type="text" value="E-mail Sent"/>
Note:	<input type="text" value="Note"/>	Attachment:	<input type="text" value="Attachment"/>
Email:	<input type="text" value="E-mail"/>	Letter Sent:	<input type="text" value="Letter Sent"/>
Closed/Won Sale:	<input type="text" value="Closed/Won Sale"/>	Lost Sale:	<input type="text" value="Lost Sale"/>

Sales Types:

Open Sale:	<input type="text" value="Open"/>	Won Sale:	<input type="text" value="Won"/>
Lost Sale:	<input type="text" value="Lost"/>		

Activity Type Completed Defaults:

Activity	Default Completed Value
<input type="text" value="Call"/>	<input type="text" value="Call Completed"/>
<input type="text" value="Meeting"/>	<input type="text" value="Meeting Held"/>
<input type="text" value="Todo"/>	<input type="text" value="To Do Done"/>
<input type="text" value="Other"/>	<input type="text"/>
<input type="text" value="Service Call"/>	<input type="text"/>



Misc Settings

Clicking on the Misc Settings link will open another menu with various options:

Misc Settings

Misc. Settings Menu

[Misc Settings](#) [Path Settings](#) [Security Settings](#) [Disable Site](#) [Site Messages](#)

Misc Settings: [Save](#)

Automatic Logoff:	<input type="text"/>	Max Items in Drop Down:	<input type="text"/>
Alarm Refresh (minutes):	<input type="text"/>		
Default Email/HTML Template:	<input type="text" value=""/>	Default Hidden BCC:	<input type="text"/>
Email Charset:	<input type="text" value="iso-8859-1"/>	Default CSS File:	<input type="text" value=""/>

Tasklist Remembers: **No Cookies:** **HTTPS:** **Translate Templates:**

Automatic Logoff – This setting will log a user out of WiredContact Enterprise when they are not active in the interface for the amount of time listed here (in minutes). The default value is 10 minutes, but may be increased if there is little risk of unauthorized users gaining access to valid WiredContact user terminals.

Max Items In Drop Down – This setting controls the maximum number of items to display in any drop down list. The default value is 250. Long dropdowns increase page size and decrease performance. Additionally, the utility of very long dropdowns is disputable.

Alarm Refresh – WiredContact Enterprise will check for alarms at an interval equal to the number entered here (in minutes). The default value is 5 minutes.

Default Email/HTML Template – The template chosen from this dropdown menu will be the default template used when rich text / HTML emails are sent from WiredContact Enterprise. This dropdown is populated with the *.htm* templates contained in the HTML Templates folder. Any email merge document specifying a different HTML template will override the default selection chosen here.

Default Hidden BCC – The email address entered here will receive hidden blind copies of all emails sent from WiredContact Enterprise.

Email Charset – This specifies the default email character set for the WiredContact Enterprise site. This field contains default information that should not be changed unless the administrator knows exactly what to replace it with.

Default CSS File – The default .css file dictates the color scheme and font size for the WiredContact Enterprise site. If additional .css files have been created, they can be assigned here. This is a field that is included for backward compatibility – and is generally not needed or used.

Tasklist Remembers – Checking this box “remembers” a user’s selected task list date range when longer than the default 2-week date range.

No Cookies – Checking this box enables the “No Cookies” option for PDA browsers that do not accept cookies. This will cause WiredContact Enterprise to add the cookie id to all URLs and forms.

HTTPS – Check this box for sites set up with an SSL protocol. This will ensure links created via the letter and/or email interfaces will be formatted appropriately.

Translate Templates – If this WCE installation is an upgrade from WiredContact for ACT!, check this box to have WCE automatically translate your HTML templates from the old field numbers to the new field names. The following function/templates currently are translated:

- Lookup
- Entity (Contact templates for example)
- SubEntityList (Contact Activities, Contact Histories for example)
- Tasklist.



Old templates are copied to the \Template Backup folder. Translated templates have an additional tag added - `<#wcetranslated>` - that keeps the template from being translated again. After you go through all the templates in the WiredContact interface, and all templates have been translated, you should turn this feature back off.


After making any changes to the Misc Settings menu, click the “Save” link at the top of the page to save them.

Path Settings

Misc. Settings Menu
Misc Settings Path Settings Security Settings Disable Site Site Messages

Misc Path Settings: Save

Attachments:
Attachment Physical Path:  
Attachment Virtual Dir:

Library Paths:
Library Physical Path: 
Library Virtual Dir:



Personal Library Folder Names:
Reports: Queries: Mail Merge:
Email Templates: Letter Templates:

Attachment Physical Path – Populate this field with the desired physical location for attachments added to contact records or attached to emails sent from WiredContact. The default is the Attachments folder under the WiredContact Enterprise install folder.

Attachment Virtual Dir – Populate this field with a name that represents the physical location of the attachments on the server. A virtual directory is a landing point in IIS that redirects to another physical location, much like a mapped drive in a network environment. The default is Attachments.

Updating Old Attachment Paths – If you have upgraded from WiredContact for ACT! (WCA) to WiredContact Enterprise (WCE), the pre-populated location in the “Attachment Physical Path” and “Attachment Virtual Dir” are based on the paths from the prior WCA installation.

You can change this path using the following instructions (please back up your wce_attachment table before doing so):

- Browse to the desired new physical attachment path using the  icon.
- Find the location of the prior attachments and copy them to the new location. You can use the Trouble Shooting...SQL...Attachment Paths link under the SQL Templates -> History section to determine what the current attachment paths are in the database. (All physical attachments should be located in the new location).
- Use the Update Attachments  icon next to the physical path. A separate window will open.

WiredContact Enterprise - Update Attachment Paths
Version: 4.70127+, Service Version: 4.70127s




This function uses the WiredContact service to alter attachment paths in the database (wce_attachment table). If you changed the physical path where attachments are stored, then you should use this utility to update the attachment paths in the database. Typically, attachment paths might change under the following example scenarios:

- You upgraded from WiredContact for ACT!, and you copied the attachments from the WiredX3\Attachments folder to the Wirede\Attachments folder
- You ran out of space on your c:\ drive and moved the attachments from c:\inetpub\wirede\attachments\ to d:\wirede\attachments
- Your attachments use to be on a network drive, and you need to change shares, or want the files locally instead of on the network

The 'Old Attachment Path' field is where the attachments use to be. You need to specify the path of the folder you moved: for example, if you moved the Attachments folder from c:\inetpub\wirede\ to c:\inetpub\wirede - you would specify: c:\inetpub\wirede\attachments.

The 'New Attachment Path' is where the attachments are now. You need to specify the folder the attachment were moved to: for example, if you moved the attachments to the c:\inetpub\wirede\Attachments folder - you need to specify c:\inetpub\wirede\Attachments.

You may want to inspect the wce_attachment table to see what the current attachment paths are in the database.

Old Attachment Path: 
New Attachment Path: 


- The “Old Attachment Path” field represents where the attachments used to be.
- The “New Attachment Path” field represents where the attachments are now.
- Click the “Save” icon to begin the update of attachment paths to the “New Attachment Path” location.
- This process can be completed as many times as necessary to modify more than one old attachment path.

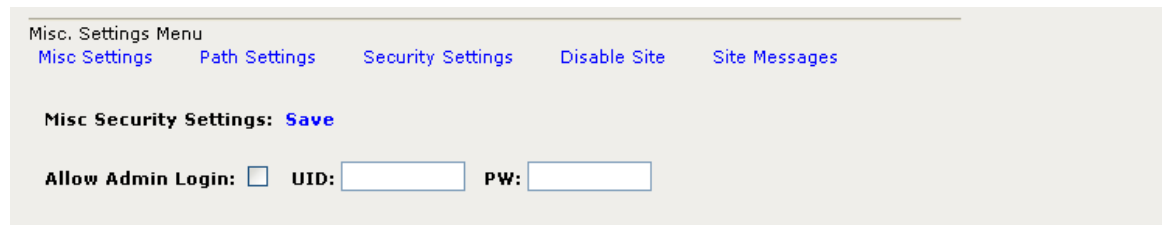
Library Physical Paths – Populate this field with the desired physical location for the main library in WiredContact Enterprise. The default is the Library folder under the WiredContact Enterprise installation folder.

Library Virtual Dir – Populate this field with a name that represents the physical location of the main library on the server. A virtual directory is a landing point in IIS that redirects to another physical location, much like a mapped drive in a network environment. The default is Library.

Personal Library Folder Names – Certain personal library folders are automatically created based on a user’s activity in WiredContact. This area allows for the specification of these folder names for when they are created.

After making any changes to the Path Settings menu, click the “Save” link at the top of the page to save them.

Security Settings



Misc. Settings Menu
[Misc Settings](#) [Path Settings](#) [Security Settings](#) [Disable Site](#) [Site Messages](#)

Misc Security Settings: [Save](#)

Allow Admin Login: **UID:** **PW:**

Allow Admin Login – Used to give someone remote ability to administer the WiredContact Enterprise site. By default, the only means of accessing the admin facilities is from the WiredContact Server itself. By using this option, you can give someone a userid/password to access the Admin functions.

Please note that when this option is enabled, everyone going to the WiredContact site will see the Admin link.

The User ID is not case sensitive, but the Password is case sensitive.

After making any changes to the Security Settings menu, click the “Save” link at the top of the page to save them.

The other method of giving remote ability to administer the WiredContact site is via the Admin Security link on the Admin navigation bar on the right side.

Disable Site



Misc. Settings Menu
Misc Settings Path Settings Security Settings **Disable Site** Site Messages

Misc Settings: [Save](#)

Disable WiredContact:

Message to show when site is disabled:

WiredContact has been disabled by the administrator.

Disable WiredContact – Check this box to disable WCE. If this box is checked (and saved) then anyone going to the WiredContact site will see this message instead of the function they were trying to access.

Message – Type the message to show when the WCE site is disabled. A default message appears here. You can use standard html in this message, so image tags, style sheet parameters, standard html, etc. can be used to make a message. For example:

```
<span class=rlbl>WiredContact has been <u>disabled</u> by the administrator</span>
```

would show the message using the Red Label (rlbl) style sheet class from the stylesheet.css file – and underline the word “disabled”.

After making any changes to the Disable Site menu, click the “Save” link at the top of the page to save them.

Site Messages

Site messages allow you to easily put text into the WiredContact site without having to modify the html templates themselves. This allows you to setup messages for your users on the login page, and elsewhere.

By default, there are two system messages imbedded in the login.html template. (If you don't have the additional tags, you can add them to your template) Additional messages can be added. The Login.html would need to be modified to include the additional messages. The syntax for displaying the standard system messages is: `<#systemmessage name=[message name]>`. To include additional messages in the Admin...Site Messages section, modify the SiteMiscMessages.html template and include additional `<#systemmessage name=[message name] rows=x cols=y>` tags.

You can use standard html in the messages, so image tags, style sheet parameters, standard html, etc. can be used to show a message.

Misc. Settings Menu
[Misc Settings](#) [Path Settings](#) [Security Settings](#) [Disable Site](#) [Site Messages](#)

Misc Settings: [Save](#)

System Login Message (1):
Message to show on Login Page:

System Login Message (2):
(use `<#systemmessage name=login2>` to display in login.html)

System Message Disabled:
Message to show when site is disabled:
WiredContact has been disabled by the administrator.

System Login Message – Specify a message to show on the login page here. Add this tag to login.html to activate the message (if not already present):
`<#SystemMessage name=login1>`



System Login Message (2) – Specify an additional message to show on the login page here. Add this tag to the login.html to activate this message:
`<#SystemMessage name=login2>`

System Message Disabled – Type the message to show when the WCE site is disabled. A default message appears here.

After making any changes to the System Messages, click the “Save” link at the top of the page to save them.

Locale Settings

WiredContact Enterprise locale settings apply exclusively for international date, time and currency formatting and display settings.

Clicking the “Save”  icon at the bottom of the page will load the default locale settings for the server where WiredContact is installed. Clicking the “Save”  icon after making changes to the default locale settings will apply the changes to the WiredContact site only. They will not apply to the server settings.

WiredContact Site Locale Settings for wirede


Formatting:		Long Month:		Short Month:	Long Day:	Short Day:			
ShortDateFormat:	<input type="text" value="M/d/yyyy"/>	January:	<input type="text" value="January"/>	Jan:	<input type="text" value="Jan"/>	Monday:	<input type="text" value="Sunday"/>	Mon:	<input type="text" value="Sun"/>
ShortTimeFormat:	<input type="text" value="h:mm AMPM"/>	February:	<input type="text" value="February"/>	Feb:	<input type="text" value="Feb"/>	Tuesday:	<input type="text" value="Monday"/>	Tue:	<input type="text" value="Mon"/>
Date Separator:	<input type="text" value="/"/>	March:	<input type="text" value="March"/>	Mar:	<input type="text" value="Mar"/>	Wednesday:	<input type="text" value="Tuesday"/>	Wed:	<input type="text" value="Tue"/>
Time Separator:	<input type="text" value=":"/>	April:	<input type="text" value="April"/>	Apr:	<input type="text" value="Apr"/>	Thursday:	<input type="text" value="Wednesday"/>	Thu:	<input type="text" value="Wed"/>
LongDateFormat:	<input type="text" value="dddd, MMMM dd,"/>	May:	<input type="text" value="May"/>	May:	<input type="text" value="May"/>	Friday:	<input type="text" value="Thursday"/>	Fri:	<input type="text" value="Thu"/>
Decimal Separator:	<input type="text" value="."/>	June:	<input type="text" value="June"/>	Jun:	<input type="text" value="Jun"/>	Saturday:	<input type="text" value="Friday"/>	Sat:	<input type="text" value="Fri"/>
Thousands Separator:	<input type="text" value=","/>	July:	<input type="text" value="July"/>	Jul:	<input type="text" value="Jul"/>	Sunday:	<input type="text" value="Saturday"/>	Sun:	<input type="text" value="Sat"/>
Currency String:	<input type="text" value="\$"/>	August:	<input type="text" value="August"/>	Aug:	<input type="text" value="Aug"/>				
		September:	<input type="text" value="September"/>	Sep:	<input type="text" value="Sep"/>				
		October:	<input type="text" value="October"/>	Oct:	<input type="text" value="Oct"/>				
		November:	<input type="text" value="November"/>	Nov:	<input type="text" value="Nov"/>				
		December:	<input type="text" value="December"/>	Dec:	<input type="text" value="Dec"/>				

Table Defaults

Depending on how the parameters are set for each table (RecordManager field, Name fields, Sort fields and whether the sort is ascending or descending, etc) the functionality of the application can be altered.

The table parameters are set by a few different mechanisms. First, you can set the parameters for the table in the template itself. Second, you can pass parameters to the table via the URL. Finally, if the parameters have not been set, then they are taken from the Table Defaults set in the Admin Configuration.

Clicking the “Table Defaults” link opens a list of all WiredContact Enterprise tables. Clicking on the table names opens a listing of default properties for each table. The information pre-populated in these fields for known WiredContact Enterprise tables that require them. If additional tables are added – you will need to set the initial table defaults for those fields. Below is an example Table Defaults page for the wce_contact table.

Tables for Database Alias WCE Wirede Site:
wce_activity wce_attachment wce_contact wce_dropdowns

wce_activity
wce_attachment
wce_contact
wce_dropdowns
wce_groupcontacts
wce_groups
wce_history
wce_linkto
wce_products
wce_sales

Defaults for Table: wce_contact WCE Wirede Site

Set to Default

Table Label:	Contact	Create Date Field:	CREATETIME	Main Page:	frContact.html
Table Type:	Entity	Edit Date Field:	EDITTIME	Lookup Page:	Lookup.html
ID Field:	UNIQUEID	Primary Date Field:		Save Function:	contact
RecordManager Field:	RECORDMANAGE	Create User Field:	CREATEUSER	Save Page:	contact.html
Managing Team Field:		Edit User Field:	EDITUSER	Edit Function:	contact
Name 1 Field:	Contact	SubEntity:		Edit Page:	contact.html
Name 2 Field:	Company	Link Table: (SubEntity)		Delete Function:	entitydelete
First Name Field:	FirstName	Link ID Field: (SimpleSubEntity)		Delete Page:	Blank.html
Last Name Field:	LastName	Default Parent Table:			
Salutation Field:	Salutation	Default Child Table:			
Primary Email Field:	EmailAddress	Child Link Field:			
Main Sort Field:	LastName	Child ID Field:			
Secondary Sort Field:	Company				
Descending Sort:	No: <input checked="" type="radio"/> Yes: <input type="radio"/>				

The Table Label field is used when a friendly name for the table is needed. If this parameter is blank, the actual name of the table is displayed.

The Table Type specifies the default behavior for this table. Some Table Default sections apply to one type but not another. Table Type identifies the default behavior for the table. By default wce_contact is an Entity type, wce_activity is a SubEntity type, and wce_products is a SubEntiyChild (of wce_sales).

The ID field is the field used as the unique identifier for the table. It should be the Primary Key for the table.

The RecordManager field is the field used for Security for this table.

The Name 1 and Name 2 fields are used when the table data is being displayed by a common template used by many tables, such as the Mini-Lookup template.

First Name, Last Name and Salutation allow a name field to be properly parsed to include first name and last name.

The Primary email field is used by the email facilities. If the email field is not established by the template or the parameters, this value is used.

The sort fields establish the default sorting criteria for lists – such as the lookup, the sub entity lists (activities for a contact for example), and reports.

The Subentity section (only applies to SubEntity and SimpleSubEntity table types) allows you to specify the LinkTo table (default is wce_linkto), the default parent table, and the LinkID field.


The default child table applies to tables that have a primary default child (wce_sales always has wce_products as a child, wce_history sometimes has wce_attachment as a child – both have the default child table set.

The rest of the attributes identify the main display, edit, lookup, save and delete templates and functions.

Table Deletes

WiredContact Enterprise table deletes establishes and enforces the cascading delete policies. This is a feature provided by relational database management systems that should be applied when a relationship is created between two tables. Click a table name on the left to load the cascading delete information for that table on the right.

You may wish to add/remove cascading delete rules. For example, the default behavior for the `wce_contact` table, is that if a contact is deleted, any history that belongs to that contact that doesn't also belong to some other contact is deleted. If you never wish to delete history, then you should remove the cascading delete option for the `wce_history` table. Keep in mind that some relationships require both items to be in place to identify them – so if you delete the contact but keep the history, that history item is no longer identified with the contact. In this case, you may want to include the contact name in the actual history record so that it may be referenced properly in the future.

Click on the “Plus Sign”  icon next to the right of the table name on the right to add additional cascading delete information for that table.

Cascading Delete Info for Table: <code>wce_contact</code> 				
	Link Type	Table	ID Field	Record Manager ID Field
wce_activity				
wce_attachment				
wce_contact				
wce_dropdowns	 child	<code>wce_activity</code>	UniqueId	SCHEDULEFOR
wce_groupcontacts	 child	<code>wce_history</code>	UniqueId	RECORDEDFOR
wce_groups	 child	<code>wce_sales</code>	UniqueId	RecordManager
wce_history	 peer	<code>wce_products</code>	UNIQUEID	RecordManager
wce_linkto				
wce_products				
wce_sales				

Troubleshooting

Use this area to access information to aide in the troubleshooting of WCE. The information included here:

Site Trouble Shooting:	
OOPP Queue Location:	C:\Inetpub\WiredX3\oopp_queue\
virtual Directory Path:	c:\inetpub\wiredex3\
Site Error Log:	WiredContact Errors.Log 
Service Log:	WCE Service.Log 
Service Error Log:	WCE Service Errors.Log 
Examine Files:	OOPP Queue Status Logs Templates
SQL Browser:	SQL

OOPP Queue Location – The WiredContact Service uses a messaging queue that is utilized by all sites on the server. The location of the WiredContact Service Request Queue has no significant impact on the user interface or any other aspect of WiredContact. The only consideration you may need to be aware of is that each site will place files into the queue as service requests are made, and the WiredContact Service Application will retrieve and process the requests. If the file security of the queue folder

itself, or the user permissions of the Sites or the WiredContact Service are insufficient for the placement and retrieval of these requests, the WiredContact Service functions may fail. These functions include Reports, mass communication (email, mail merge) and imports.

The location of the WiredContact Service queue is set when a user logs into a site for the first time. If the queue has not already been located, it will be created in the physical folder for that virtual directory..

Virtual Directory Path – When working with a virtual directory, sometimes the physical path is difficult to tell. Here is an easy place to see the physical path for this virtual directory.

Site Error Log – All errors go to the WiredContact Errors.log file. If you have any trouble, this is the first place to look. If the file gets too big, simply delete it – it will be recreated when an error occurs. If you have trouble with WiredContact Enterprise and you need to contact support@wiredcontact.com - you should send this file as well. (If it's too large, delete it and then navigate to the page that generates the error – then send it)

Service Log – Click this link to view the contents of the WCE Service Log. The service log gives you an idea of the WiredContact Service Application activity.

Service Error Log – Click this link to view the contents of the WCE Service Error Log. This log is more of a debug log than an error log – it contains debug information about how the WiredContact service is processing requests.

Examine Files – These links allow you to view contents of WCE folders online

- **OOPP Queue** – Click this link to view the contents of the oopp_queue folder. You will see any outstanding requests and you can click on these requests to see the actual contents of the request.
- **Status Logs** – Click this link to view the contents of the WCE Status Logs. While the WiredContact Service Application is processing a request, it updates the Status Logs for that user. By viewing these files, you can see the status of a request.
- **Templates** – Click this link to view the HTML templates for the WCE site. This is an easy method to see what is actually in the template if you are working remotely and do not have access to the physical folder.

SQL Browser – Use the SQL Browser to see what the actual data is in the database. Click this link to launch the WCE SQL Browser. A separate window will open with an area for a SQL Statement on the left and a listing of tables and SQL Templates on the right.

Inserting/Updating/Deleting from the SQL Browser may have unintended consequences. Please proceed with caution. Backups should be created prior to modifying data with the SQL Browser.

SQL Statement (WCE_Site1):

[Submit SQL](#)

Tables for WCE_Site1:

- [wce_activity](#) [wce_attachment](#)
- [wce_contact](#) [wce_dropdowns](#)
- [wce_history](#) [wce_linkto](#)
- [wce_products](#) [wce_sales](#)

SQL Templates for WCE_Site1:

Contact	Activity	History	Sales
Lastname	Recent Activities	Recent History	Forecast Sales
Company		Attachment Paths	
Edit Date			
Create Date			
Count	Count	Count	Count

Trouble shoot attachment paths: [Click](#)

SQL Statement – Insert a SQL Statement in this area for use with your WiredContact site tables and click the “Submit SQL” button to apply the statement. Any type of SQL Statement can be entered here and as such, submitting SQL through this browser may have unintended consequences. Create a backup of your site tables prior to modifying data with the SQL Browser.

Tables for (Site_Database) – This section contains a listing on the tables contained in your site database. Click on a table name to display a separate window containing a listing of fields contained in the table. You can use this area as a reference for table names and field names when creating your SQL statements.

SQL Templates for (Site_Database) – This section contains sample SQL Statements that can be used for different tables within the database. Click on a link to put the selected SQL statement into the SQL Statement editor. The examples contain “select” statements, which are intended to display information, and not modify it.

Sample SQL Templates include:

Count – for each table listed, select the Count link to see how many records are in the table.

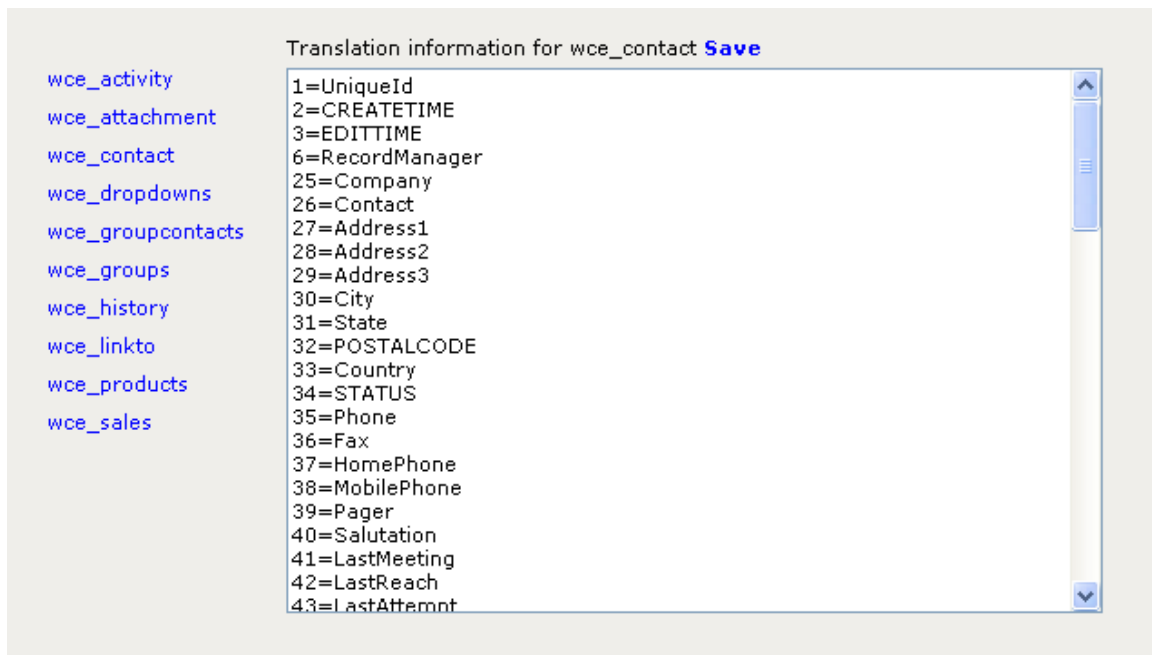
Troubleshoot Attachment Paths – Click this link to use a SQL “select” statement from the attachment table to identify the attachment paths for your database. Click the “Submit SQL” button to execute your query. Use the **Attachment Path Update Tool** (Site Settings→Misc. Settings→Path Settings) to move old attachment paths to a new location.

ACT! Table Translations

This section is used with an upgrade from WiredContact for ACT! In ACT!, the actual fields were referenced by a number. In WiredContact Enterprise, the actual fields are referenced by the field name.

During the conversion process, WiredContact Enterprise assigned field names in the new database to match the numbers that were located in the ACT! database. Clicking the “ACT! Table Translations” link opens a list of all WiredContact Enterprise tables. Clicking on a table names opens a listing of the field translations that were made by WiredContact Enterprise for the selected table.

This information is necessary as long as any of your WiredContact templates contain references to fields by number. If you want default templates that have all fields referenced by name, contact WiredContact for more information. If the translation tables are lost, and you have not updated your templates to reference the fields by name, you will not be able to use your templates. You may be able to correct this situation by looking in the virtual directory that you converted the ACT! database from to find the “[table name] FieldNumber Translate.txt” file for the table. You can copy the contents of that file and paste here for the appropriate table if your translations were lost. After making any changes, click the “Save” link at the top the page to save them.



The screenshot displays the 'ACT! Table Translations' interface. On the left side, there is a vertical list of table names: wce_activity, wce_attachment, wce_contact, wce_dropdowns, wce_groupcontacts, wce_groups, wce_history, wce_linkto, wce_products, and wce_sales. The 'wce_contact' table is selected, and its translation information is shown in a larger window on the right. The title of this window is 'Translation information for wce_contact Save'. The window contains a list of field translations, where a number on the left corresponds to a field name on the right. The translations are: 1=UniqueId, 2=CREATETIME, 3=EDITTIME, 6=RecordManager, 25=Company, 26=Contact, 27=Address1, 28=Address2, 29=Address3, 30=City, 31=State, 32=POSTALCODE, 33=Country, 34=STATUS, 35=Phone, 36=Fax, 37=HomePhone, 38=MobilePhone, 39=Pager, 40=Salutation, 41=LastMeeting, 42=LastReach, and 43=LastAttempt.

Field Number	Field Name
1	UniqueId
2	CREATETIME
3	EDITTIME
6	RecordManager
25	Company
26	Contact
27	Address1
28	Address2
29	Address3
30	City
31	State
32	POSTALCODE
33	Country
34	STATUS
35	Phone
36	Fax
37	HomePhone
38	MobilePhone
39	Pager
40	Salutation
41	LastMeeting
42	LastReach
43	LastAttempt





































User Settings

In order to add users or configure existing users, click on the “User Settings” section in WiredContact Enterprise. A screen will display with a list of existing UserIDs, full names, current site access level, license type, default signatures, and the user’s contact record information.

WiredContact Enterprise Users

Filters: UserID Contains

[New User](#)


	Userid		Full Name	Access	Type	Sig	Contact Record	
1	 Juliette Rosseux		Juliette Rosseux	Allow	Named		Juliette Rosseux	WiredContact Worldwide 
2	 Jane Chan		Jane Chan	Allow	Named		Jane Chan	WiredContact Worldwide 
3	 Chris Huffman		Chris Huffman	Allow	Named		Chris Huffman	WiredContact Worldwide 
4	 Vika Dempsey		Vika Dempsey	Allow	Named		Vika Dempsey	WiredContact Worldwide 
5	 Cecil Carter		Cecil Carter	Allow	Named		Cecil Carter	WiredContact Worldwide 
6	 Robin Henry		Robin Henry	Allow	Named		Robin Henry	WiredContact Worldwide 
7	 Ralph Rosarky		Ralph Rosarky	Allow	Named		Ralph Rosarky	WiredContact Worldwide 
8	 Gunther Anderson		Gunther Anderson	Allow	Named		Gunther Anderson	WiredContact Worldwide 
9	 Bob Newuser		Bob Newuser	Allow	Named		Bob Newuser	WiredContact Worldwide 


UserID – This column displays the UserID. Clicking on the UserID will display a user information screen to add or change settings. The userid is what the user uses to login to the database.


Full Name – This column displays the full name associated with the userid. This information can be changed in the user information screen. The Full Name is what is displayed for any user list, record manager drop down in the application.

Access – This column displays the current site access level for a user. Clicking on the value in the “Access” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not be able to login to the WiredContact Enterprise site, and will not utilize a Named license – even if the denied user is identified as a Named user.


Type – This column displays the current license type being used by a user. Clicking on the value in the “Type” column will change it from “Named” to “Concurrent”, or “Concurrent” to “Named”.

Sig – Clicking on the “Edit”  icon in this column allows the administrator to set the signature information for a user. Typically the signature is set when the user sends an email, but the administrator may want to modify that.

Contact Record – These columns display the contact and company name for a user’s associated contact record. Clicking the “Change”  icon on the right will open a new window. This mini-lookup screen is used to perform a lookup for the contact record that will be set as the associated contact record for a user.

NOTE: The “Delete”  icon between the “Userid” and “Full Name” columns will delete the selected user from the database.

User Information Screen

Clicking on the “Edit”  icon before the Userid, or clicking on the Userid itself will display a user information screen to add or change user settings. This screen is populated with user specific information to be completed as follows:

UserID – Change the UserID here.

Password – Add or change a password here.

PIN – Assign a personal identification number for users to change their password.

Full Name – The full name of the user associated with the UserID.

Email – An alternate user email address can be placed here for administrative use only.

Default Email Template – The template chosen from this dropdown menu will be the default template used when rich text / HTML emails are sent from a user. This dropdown is populated with the *.htm* templates contained in the HTML Templates folder and overrides the default email template setting in the **Misc. Settings** area of “Site Settings”. Any email merge document specifying a different HTML template will override the default selection chosen here.

Email Hidden BCC – The email address entered here will receive hidden blind copies of all emails sent from this user. This hidden BCC can be used in combination with the default hidden BCC used in “Site Settings” and also in combination with any hidden BCC specified in an email merge document.

CC (Country Code) – The value entered here represents the telephone country code for a user’s location. The value entered here should be a “+” sign, followed by the user’s country code.

Timezone Offset – Enter the relative time zone difference between where the server is located and where the user will be accessing WiredContact. The default value is 0.

Start Page – The page selected from this dropdown will be the page that a user will see after logging in.

Lookup All – When checked, a user can perform a lookup without entering any criteria and all contacts available to the user are returned. If this item is not checked, if the user specifies no criteria, no contacts are returned.

Mass Email – When checked, a user can send emails to more than one contact at a time.

Mail Merge – When checked, a user can create letters for more than one contact at a time.

Add To Library – When checked, a user can add documents to the main library. Library documents are also be added by using Windows Explorer on the server.

Delete From Library – When checked, a user can delete documents from the main library. Library documents are also be removed by using Windows Explorer on the server.

Edit / Replace – When checked, a user can update contact fields and update history information for more than one contact at a time.

Exclude “My Records” from Security – When checked, a user will be able to see their own contact record despite any security restrictions that may otherwise prevent them from viewing it.


Deny Access – When checked, a user will not be able to login to the WiredContact Enterprise site.

Named User – When checked, this box indicates that a user is making use of a named license type. The other license type is concurrent.

Lead Catcher User – When checked, this box indicates that a user can be the record manager used with a Lead Catcher submission. Currently, only one user per site should be designated as the record manager for a Lead Catcher submission. This information can also be specified directly in the HTML template itself and will override the selection made here.

Personal Library Physical Path – This path represents the physical location of a user’s personal library on the server.

Personal Library Virtual Dir – This directory path represents the physical location of a user’s personal library on the server. All references to this virtual directory are redirected to the physical directory.

After making any changes to the user information screen, click the “Save”  icon at the bottom of the page to save them.

WiredContact Enterprise
User information Team Memberships

UserID:
 Password:
 PIN:
 Full Name:
 Email:
 Default Email/HTML Template:
 Email Hidden BCC:
 CC:
 Timezone Offset:
 Start Page:

Lookup All:
 Mass Email: Mail Merge:
 Add To Library: Delete From Library:
 Edit/Replace:

Exclude My Records from Security:
 Deny Access: Named User:
 Lead Catcher User:

Personal Library Physical Path:
 Personal Library Virtual Dir:

Table Security Profiles

User Security Profiles allow field level and record level security by table to be implemented by User.

If converting a WiredContact for ACT! site, the user security from that site will also be converted.

Table Security Profiles

Table	Applies*	Access	Update	Delete	New	Reports	Profile
1:default.default	Default	Allow	Allow	Deny	Allow	Deny	
2:wce_activity	Default	Allow	Allow	Allow	Allow	Deny	Add
3:wce_history	Default	Allow	Deny	Deny	Allow	Deny	Add

* Default = If no other rule applies
 Not RM = If not Record Manager rule
 Not TMO = If not Team Member Owner rule
 Not MT = If not on Managing Team rule

There is always at least one rule applied to a user – which is the default.default rule. This rule is the default rule for the default table. This means that this rule will apply if no other rule is applied before it.

A rule consists of the Access, Update, Delete, New and Reports attributes.

For each table, up to 4 rules may be applied. A Default rule, a Not Record Manager owned rule, a Not Team Member owned rule and a Not on Managing Team rule.

RecordManager rules utilize the Recordmanager field of the table, and the UniqueID of the user in the system user table (the displayed name is the Full Name from the user table). The Not Team Member Owned rule utilizes the RecordManager field and the UniqueID of the users in the system table that are on the same team as the user viewing the data. The Not on Managing Team rule uses the Managing Team field for the table.

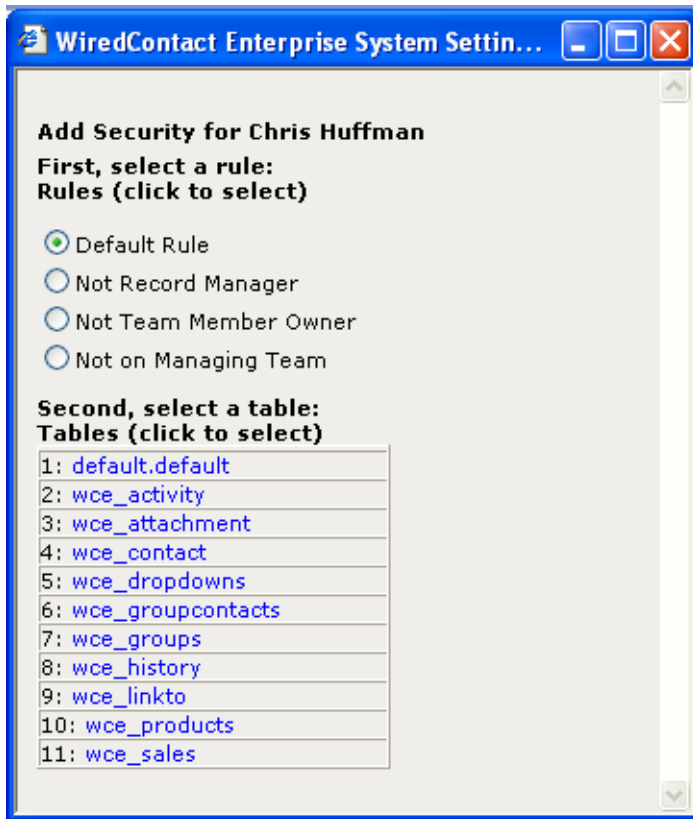
The rules work by examining the rules that match the table where the data comes from, and if none of those rules apply, then the default rules are applied. If no rules apply prior to the default.default rule, then that rule is applied.

Table Security Profiles +

Table	Applies*	Access	Update	Delete	New	Reports	Profile
1:default.default	Default	Allow	Allow	Allow	Allow	Allow	
2:wce_contact	Default	Allow	Allow	Allow	Allow	Allow	Add -
3:wce_contact	Not RM	Allow	Allow	Deny	Allow	Allow	Add -
4:wce_contact	Not TMO	Allow	Deny	Deny	Allow	Allow	Add -

For example, to give a range of record level security attributes for the wce_contact table, you might add a wce_contact Default rule that Allows Access, Updates, Deletes, New and Reports. Then, if the contact is not owned by a user that is on the same team as the user viewing the data, you want to deny deletes and updates (you can't delete/update a contact unless the contact is owned by someone on your team), then you would add a wce_contact Not TMO rule where the Delete and Update attributes are listed as Deny. Then, if the contact is not owned by the user viewing the record, you want to deny Deletes (you can't delete a contact unless you are the record manager), then you would add a Not RM rule where the Delete attribute is listed as Deny. In this example, the default.default rule is never applied because there is a wce_contact default rule that would apply if one of the other wce_contact rules didn't apply. This wce_contact Default rule would only apply if the user WAS the RecordManager of the contact being viewed. If the user was not the Recordmanager, one of the other wce_contact rules would apply.

To add a user security profile for a user, click on the plus sign + next to the "Table Security Profiles" heading. A separate window will open.



First, select a rule from the available options:

- **Default** = If no other rule applies
- **Not RM** = “If not Record Manager” rule – applies if the user is not the Record Manager of the record
- **Not TMO** = “If not Team Member Owner” rule – applies if the user is not on the same team as the Record Manager of the record
- **Not MT** = “If not on Managing Team” rule – applies if the user is not on the same team that appears in the Managing Team field of the record.

Second, select a table that the rule will be applied to.

The window will close and the original screen will refresh with the new rule added. Several columns of information can be modified for each rule:

Table – Displays the table that the rule applies to. “default.default” is a special name listed here that represents the default profile that applies for new users and in the absence of additional user rules.

Applies* – Displays the rule that is applied for the table. (Default, Not RM, Not TMO, Not MT)

Access – Displays the current access level for a user. Clicking on the value in the “Access” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not have access to view the records for the table referenced in the rule.

Update – Displays the current update level for a user. Clicking on the value in the “Update” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not be able to update/save records for the table referenced by the rule.

Delete – Displays the current delete level for a user. Clicking on the value in the “Delete” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not be able to delete the records for the table referenced in the rule.

New – Displays the current ability for a user to add new information. Clicking on the value in the “New” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not be able to add new information to the table based on the rule applied. New only applies for the default rule for a table.

Reports – Displays the current report level for a user. Clicking on the value in the “Reports” column will change it from “Allow” to “Deny”. If “Deny” is chosen, the user will not have the ability to view report results for the table contents based on the rule applied.

Profile – Displays the current site security profile (field level security profile) that applies to the rule. To assign a site security profile, click on the “Add” link for the corresponding rule. Clicking “Add” opens a new window:



In the window that opens, click on the desired profile that corresponds to the table to add it to the security for a user.

A Site Security Profile must be created prior to assigning a Site Security Profile to a rule. Only Site Security Profiles for the table specified in the rule will show up in the “Add” window.

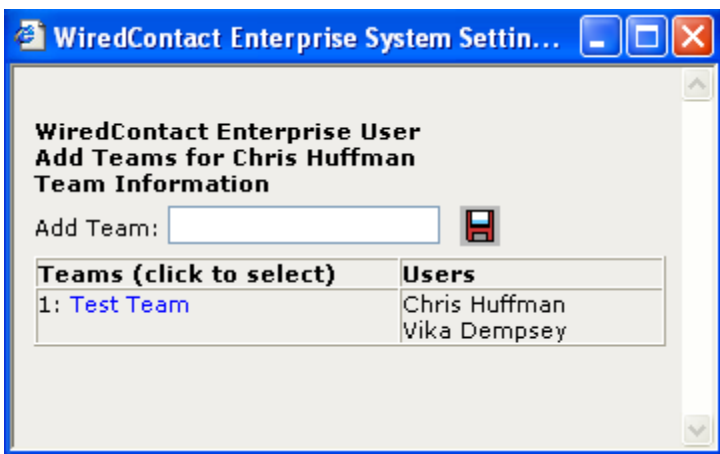
To clear/remove the Site Security Profile for a rule, use the [clear] link found in the Add window.


Please refer to the “Site Settings” section of this document for additional information about creating Site Security Profiles.

Team Memberships

Users can be assigned to cooperative groups called Teams. Teams allow you to assign security profiles based on the teams. Teams also apply to other functions, like the LayoutTest option for customizing templates.

Users are Members of the same Team if they have the same Team Name entered in the Team Membership list. A user may belong to more than one team. To add Team Membership for a user, click on the plus sign **+** next to the “Team Memberships” heading. A separate window will open.



In the window that opens, you can either add the user to a new team by entering in the Team Name and selecting the “Save”  icon, or you can add the user to an existing team by selecting that team from the list. The current users belonging to the existing teams appear to the right of the team name links.

See the User Security Profiles section for more information on using security and teams.

Database Aliases

The Database Alias section is used to setup external database links that can be access inside of WiredContact Enterprise via the dbList and dbPage functions. Your main System and Site aliases will appear here, but you do not want to modify those aliases from this section – instead use the System Information and Site Information sections to modify those aliases.

You may want to use external database links to access data that might relate to an entity in WiredContact Enterprise.

To view a listing of database aliases set up for WiredContact Enterprise, click on the “Database Aliases” section from the main menu. A screen will display with a listing of current aliases. Click the name of an alias to view the details. The “Main Menu” link will return you to the admin configuration menu.

NOTE: Create a new alias by clicking the “New Alias” link and following the instructions provided in the “Site Settings” section of this guide.

Understanding Site Tables and Fields in WiredContact Enterprise

After configuration of your WiredContact Enterprise Site, clicking the “Site Settings” link will display a listing of tables for a WCE site. Click on a table name to display a separate window containing a listing of fields.

Add a new field by clicking the “New Field” link on the top right hand side of the page. The window will open with the New Field dialog.

New Field for Table: wce_contact, Alias: WCE Wirede Site

New field name:

Field type: VARCHAR

Field width: Decimals:

Default Value:

[Close Window](#)

New field name:

Field type: VARCHAR

Field width: VARCHAR

Default Value: TEXT

[Close Window](#)

NUMERIC

CURRENCY

MEMO

DATE

The “New Field” window uses database terminology for adding fields to the database. If you want add add a text field with a length less than 255 characters, use the Text or VarChar field type. When specifying a text type, you should specify a Field Width that is the largest number of characters a single entry would contain.

The Memo field type is for text information of unknown length, but larger than 255 characters.

When using Memo or Date field types, the Field Width property is ignored. The preferred method of adding a Currency type is to add a Numeric type with a field width of 19, and Decimals equal to 4. You can use the WiredContact “Usage” attribute (found later in this document) to format the Numeric data as Currency.

Field Information for Table wce_contact:

Filters (contains): Field Name: Field Type: Field Usage:

[Close Window](#) [New Field](#)

	Field Name	Field Type	Max Length	Drop Down	DD Type	Field Label	Field Usage	History	Primary	
15	Contact	Text	50	Add	Std.	Contact	Name	no	no	-
16	ContactType	Long Integer		Add	Std.	Contact Type	Numeric	no	no	-
17	Country	Text	25	Mod Del	Std.	Country	Text	no	yes	-

Modify field attributes including drop down menu types, field labels and field usage using the information below:

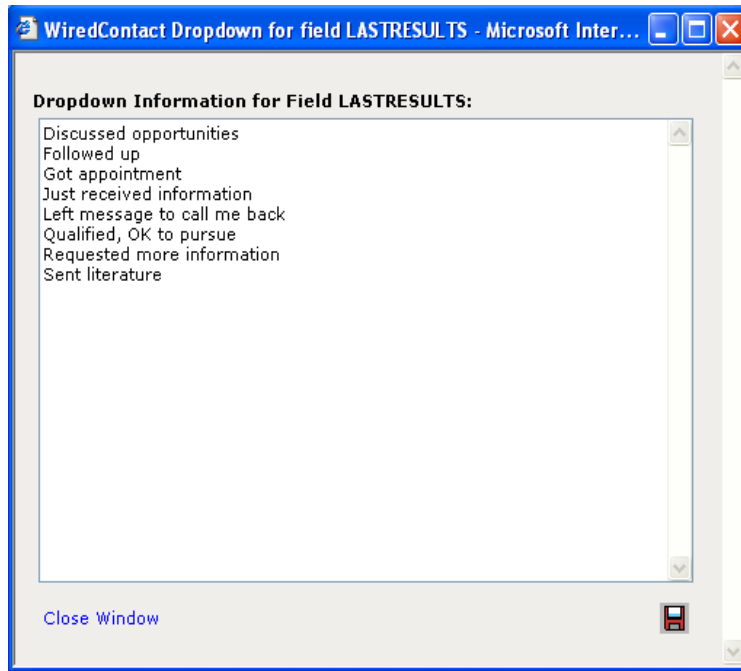
Field Name – Displays the field name as it is listed in the database. This information can only be changed in the database. Field names are not generally seen by the end user.

Field Type – Displays the field type as it is listed in the database. This information can be changed in the database only. Field types are not generally seen by the end user.

Max Length – Displays the maximum number of characters allowed for a field. This information can be changed in the database only.

Drop Down – Displays the current drop down status of a field.

If there is not a drop down for a field, click the link that says “Add” in this column to add drop down list. A separate window will open. Enter the values for the drop down in the area provided and click the “Save” icon when finished.

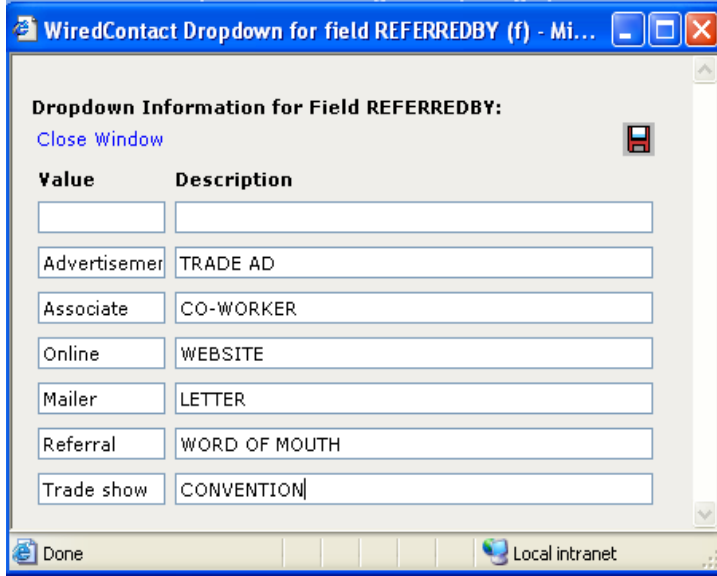


If there is already a drop down menu for a field, two links will display in this column, “Mod” and “Del”. Click on the “Del” link to delete all values in the drop down. Click on the “Mod” link to modify the values contained in the drop down. The screen that displays when you modify a drop down depends on the drop down type (DD Type, below)

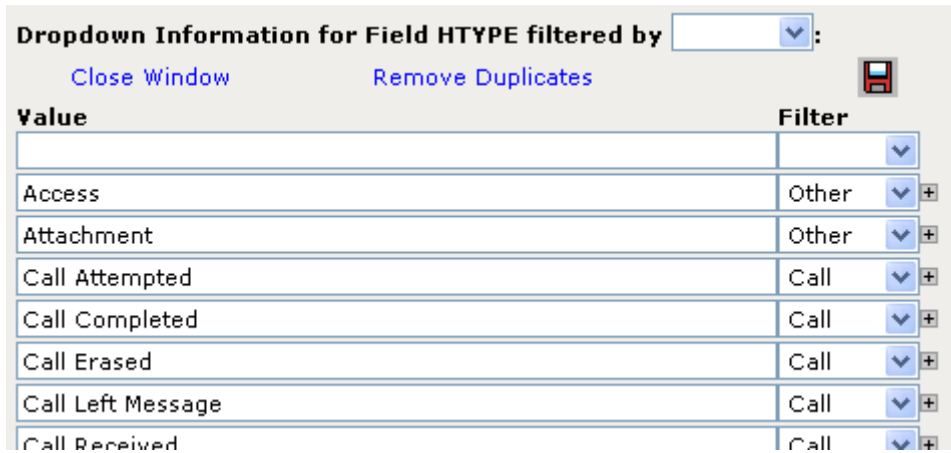
DD Type (Drop Down Type) – Displays the type of drop down menu for a field. The options are:

1. Std. (Standard) – This drop down type displays standard drop down values. Click the “Save” icon after adding or updating information.

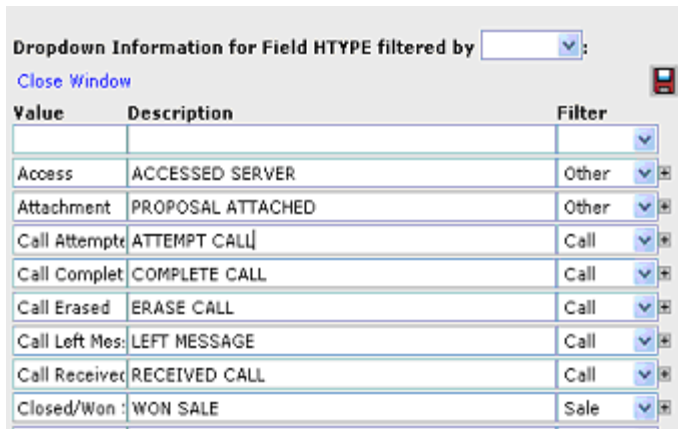
2. **Desc. (Description)** – This drop down type displays descriptions with the drop down values. Click the “Save” icon after adding or updating information.



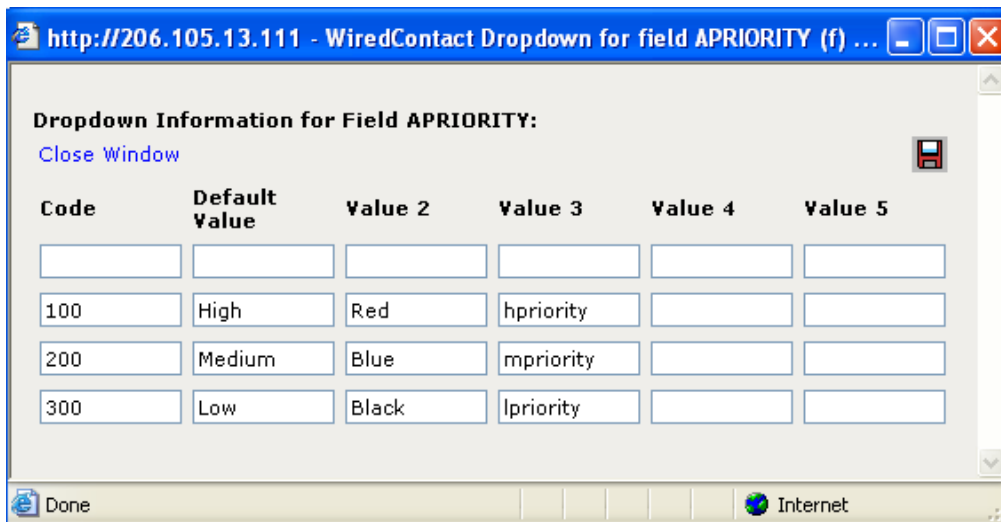
3. **Filtered** – This drop down type enables one drop down value to change the drop down options for another field in the same table. The filtered fields are identified in the HTML template that displays field information. Click the “Save” icon after adding or updating information.



4. **Filtered Desc.** – This drop down type enables one drop down field value to change the drop down options for a description field in the same table. The filtered fields are identified in the HTML template that displays field information. Click the “Save” icon after adding or updating information.



5. Coded – Use Coded values if the data in the database needs to sort differently than the standard sorting for that value, or if you need to display different values on different screens for the same database value. The “Code” value is what is stored in the database. The “Default Value” is what is displayed by default when looking at the data in WiredContact Enterprise. The additional values can be displayed by altering the html. For example, `<#field name=apriority pos=3>` would use the value in “Value 3” for the Activity Priority field.

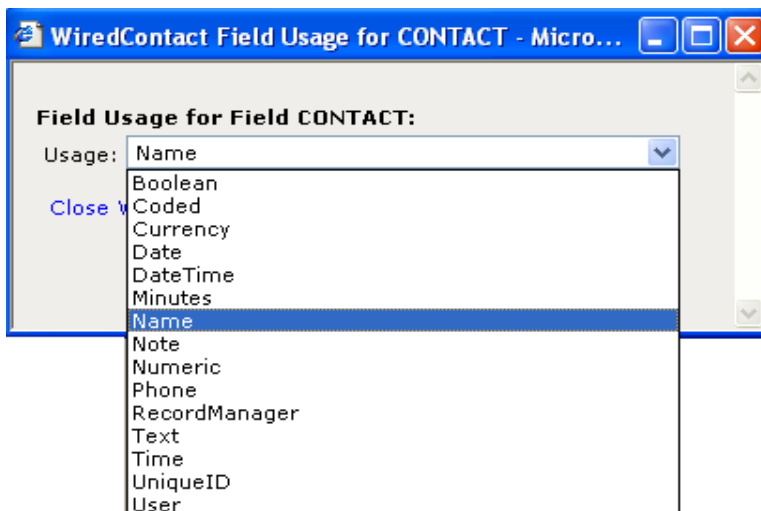


Field Label – Displays a default label for a field name. The field labels are displayed in place of the field names through WiredContact Enterprise. Click on the existing field label to change it. A separate window will open to enter the new field label. Click the “Save” icon when finished.



Field Usage – Displays the current field usage. Field usage controls the way fields are formatted in WiredContact Enterprise. Click on the existing field usage to change it. A separate window will open to select field usage from the drop down menu. Click the “Save” icon when finished. Current available field usages are:

1. Boolean
2. Coded
3. Currency
4. Date
5. Date/Time
6. Minutes
7. Name
8. Note
9. Numeric
10. Phone
11. Record Manager
12. Text
13. Time
14. Unique ID
15. User



History – Displays the current history status for a field. “Yes” means that changing the field value will record this change to the history of a contact record. “No” means that it will not. Change the history status for a field by clicking on the “Yes” or “No” link in this column.

Primary – Displays whether or not a field is a primary field in the database. Primary fields are used when using the ‘Copy Contact – Primary Fields’ function. Primary fields are designated in order to provide easier identification of the most commonly used fields in the database. “Yes” means that the field is currently designated as a primary field. “No” means that it is not. Change a field to or from a primary field by clicking on the “Yes” or “No” link in this column.