

wce Outlook Contact Manager Documentation

Current version: 5.3.0 as of 12/1/2007
Website: <http://www.crmbusinessapps.com>
Client download: <http://www.crmbusinessapps.com/downloads/wce/wceOutlookCM.msi>
Server download: <http://www.crmbusinessapps.com/downloads/wce/wceAddonsServer.zip>

note: *wce Outlook Contact Manager currently does not work if Outlook is using Microsoft Word as the email editor. This can be configured within Outlook 2003 by clicking on Tools/Options/Mail Format and then unchecking "Use Microsoft Office Word 2003 to edit e-mail messages"*

Install information:

Server Install:

You will need to download the server component and place it in a directory of the server that wired contact can access. You need to unzip the full wceAddons folder into the Wired Contact virtual IIS folder. It should go in the same folder as your Wired Contact files. For example, if Wired Contact is for <http://www.testsite.com/wiredcontact> has a virtual path of c:\inetpub\wiredcontact, then you should place the wceAddons folder and its contents in c:\inetpub\wiredcontact. The path will then be visible to the web as <http://www.testsite.com/wiredcontact/wceAddons>.

The emailFields.cfg file is the configuration file. Email addresses are pulled from the fields listed within the config file. The default value is *emailaddress* field. If you have other email fields, you need to change the configuration file to list these. The format is

default:emailaddress

If you have other email addresses fields or emailaddress is not the emailaddress field, modify the emailFields.cfg file to reflect your email address fields. The list must be comma delimited with no spaces. Example:

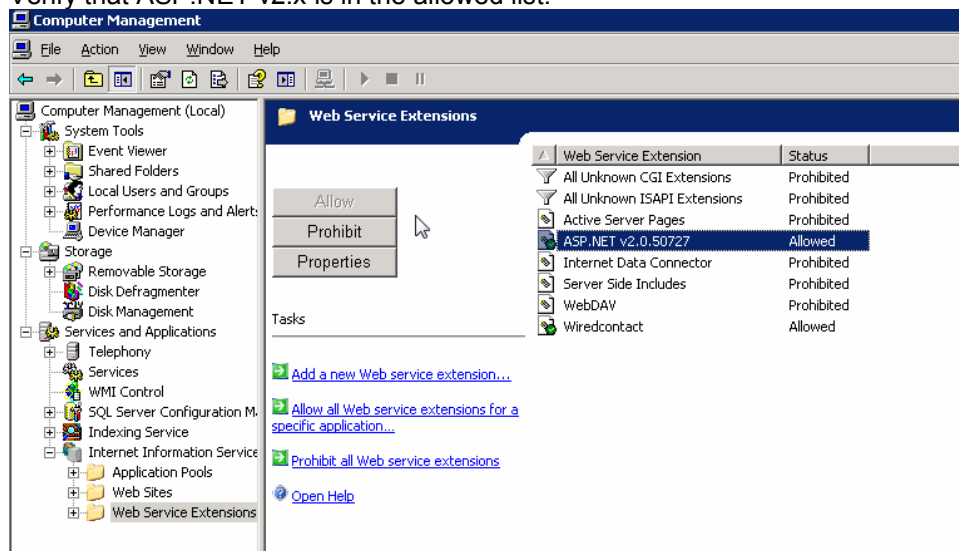
default:emailaddress,homeemailaddress

If emailaddress is not the emailaddress field, modify the emailFields.cfg file to reflect your email address fields. The list must be comma delimited with no spaces. For example, if you use **email** as you email field, you would change the emailFields.cfg to:

default:email

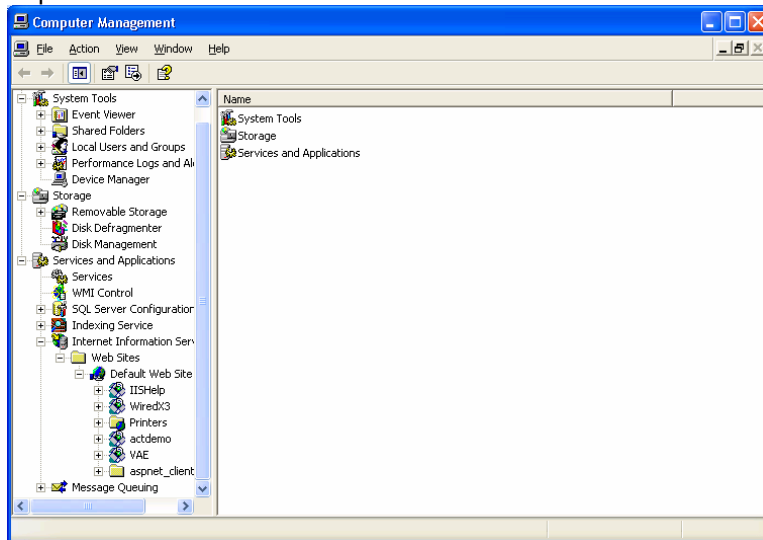
.net 2.0 is required on the server. To confirm that it is there:

1. Right click on My Computer
2. Select Manage
3. Expand - Services and Applications
4. Expand - Internet Information Services
5. Click on Web Service Extension
6. Verify that ASP.NET v2.x is in the allowed list.

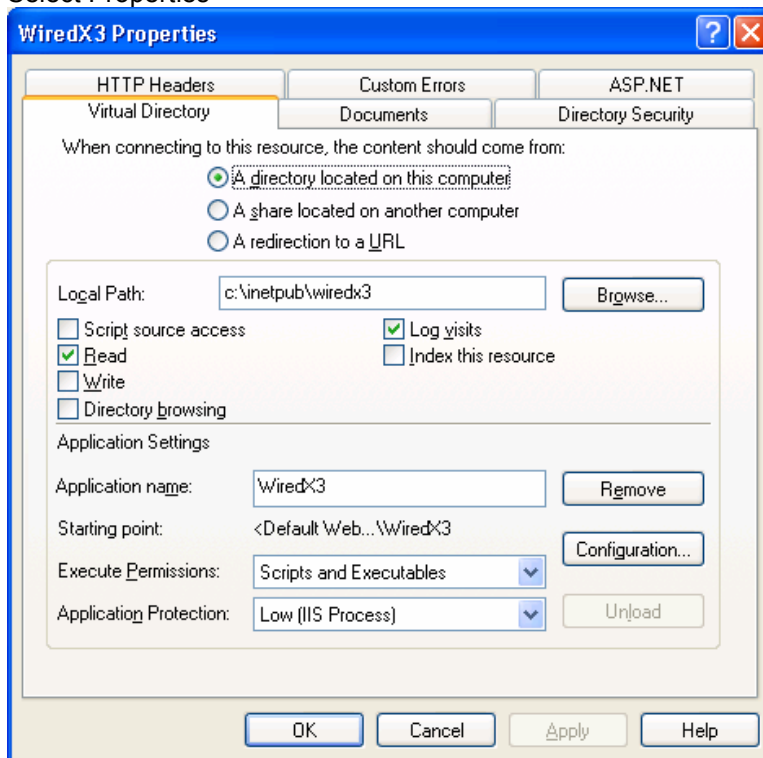


7. If not, you need to install and allow it.
 - a. Right click on My Computer

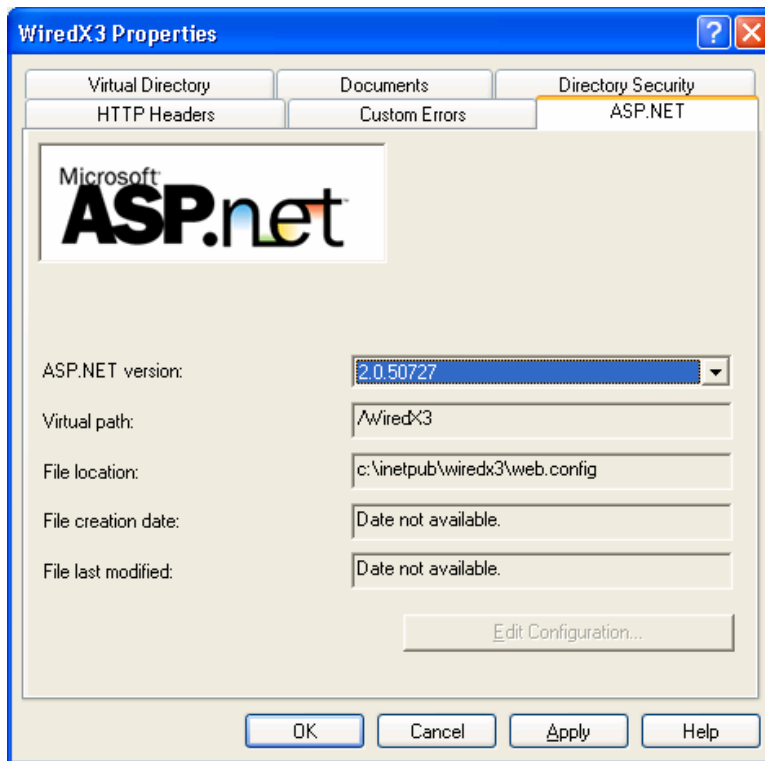
- b. Select Manage
- c. Expand - Services and Applications
- d. Expand - Internet Information Services
- e. Expand – Web Sites
- f. Expand – Default Web Sites



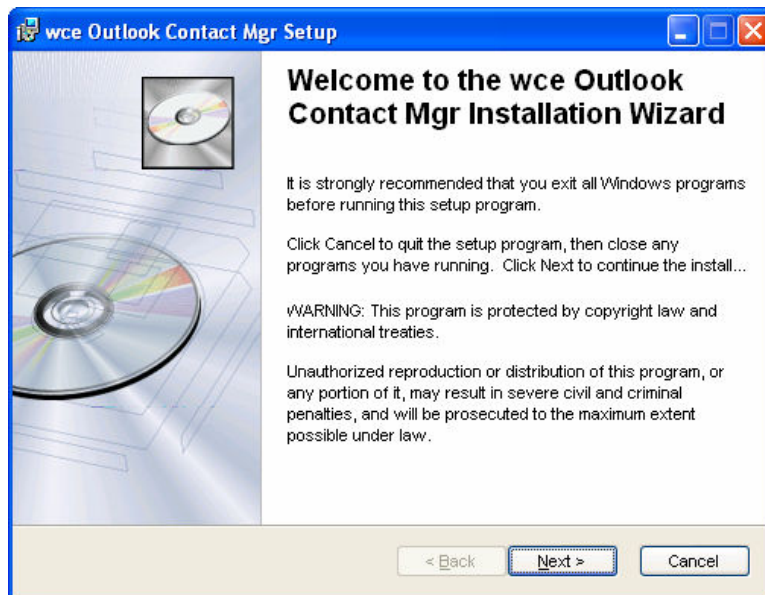
- g. Right Click on the Wired Contact Web Site
- h. Select Properties

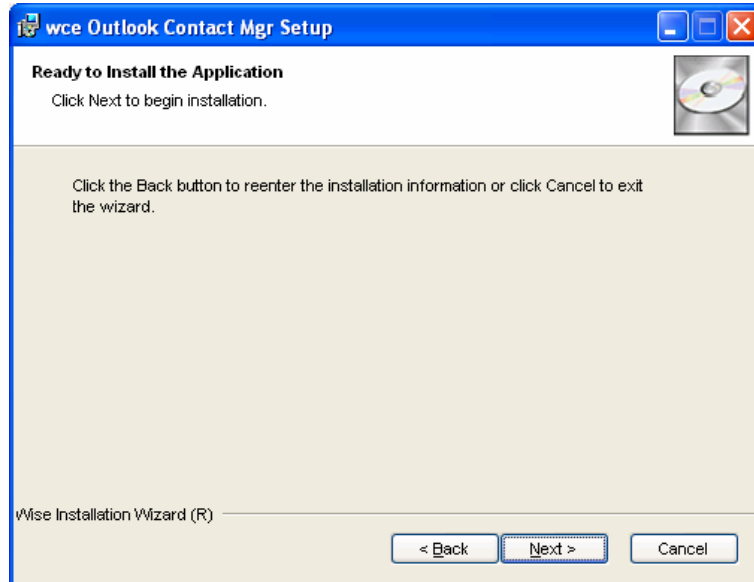
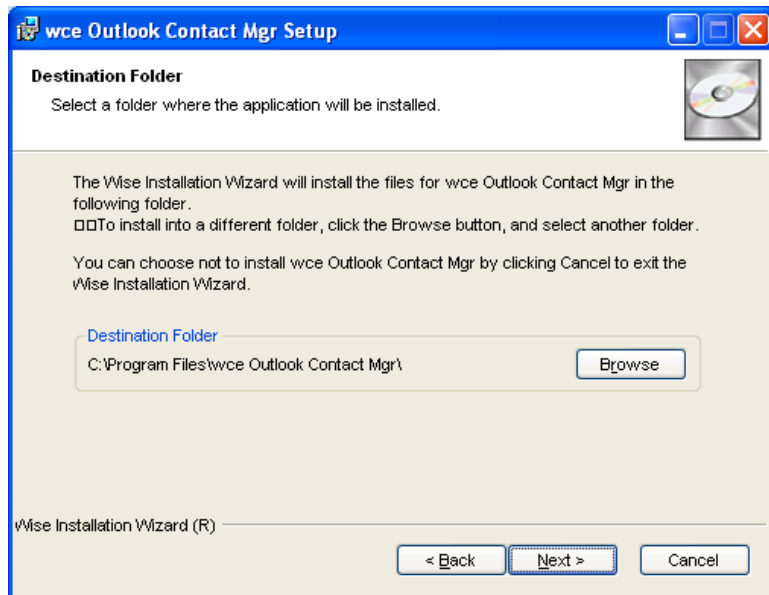


- i. Click on the ASP.net tab
Verify that the APS.net version is 2.0.50727
The virtual path should be your wired contact virtual path.
The file location is your wired contact actual path.

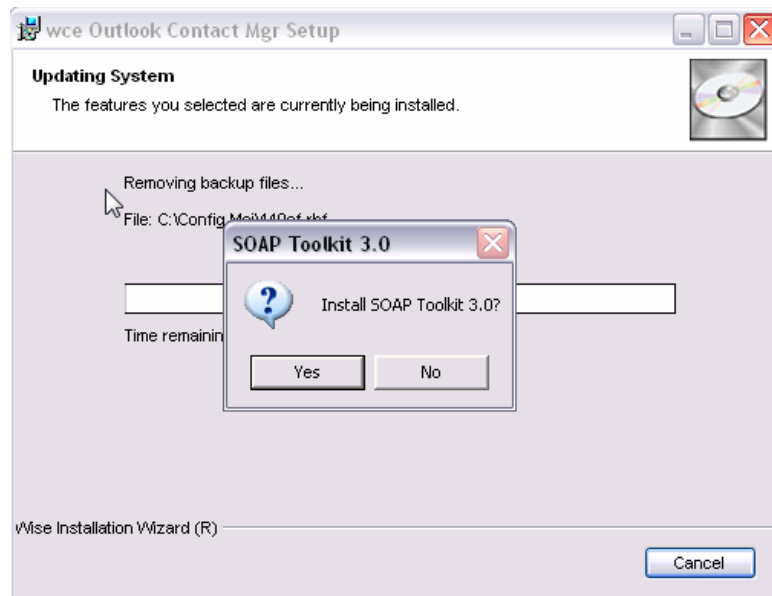


Client Install: We recommend using the default settings during the install.

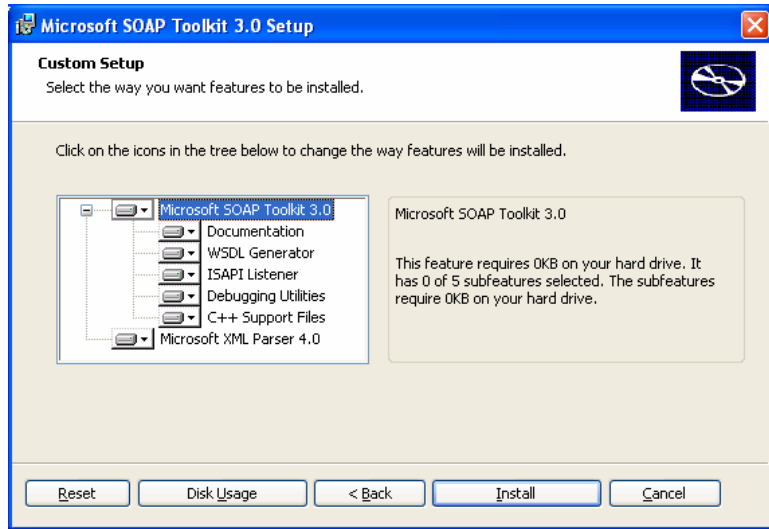
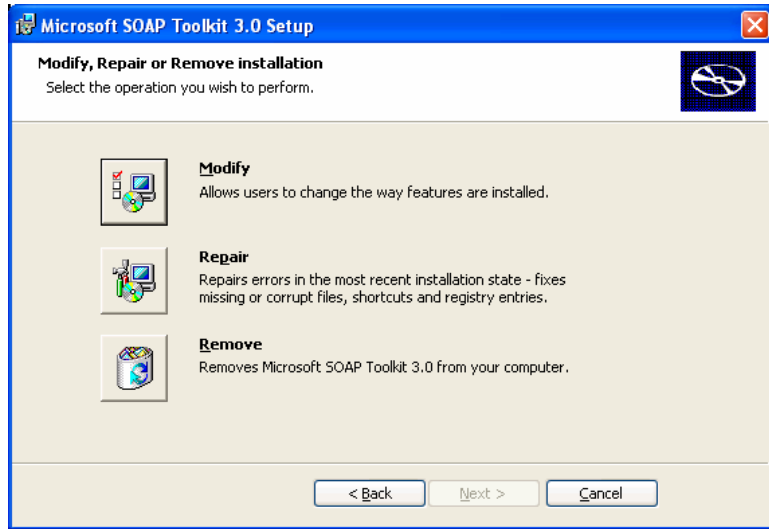


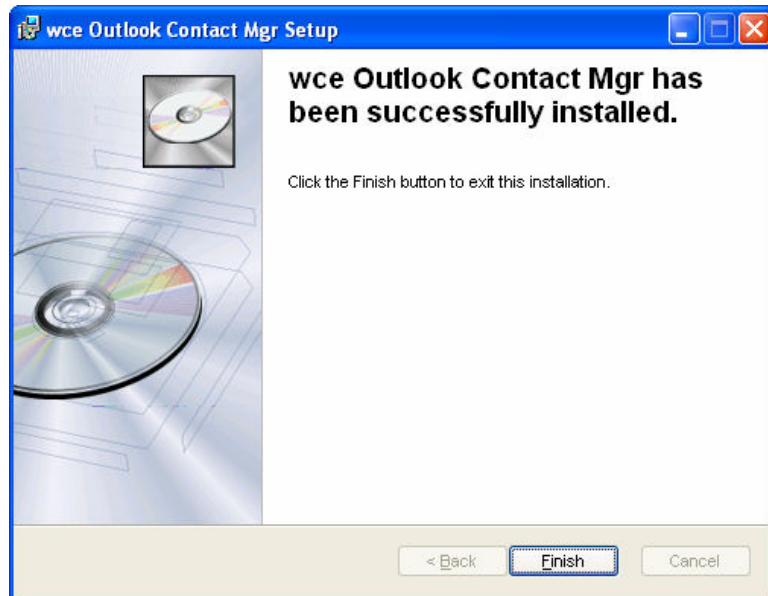


This component requires Microsoft's SOAP Toolkit 3.0 that is included as part of the client install. Click Yes when prompted to install the SOAP toolkit.



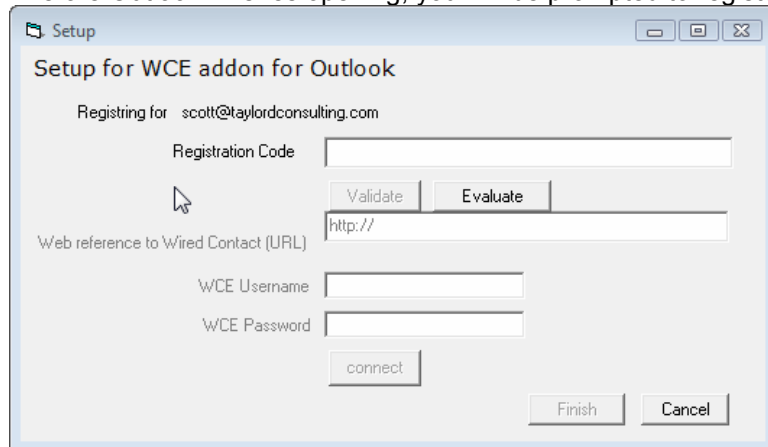
If this screen appears, select "Modify"





Registration:

Open Microsoft Outlook. Before Outlook finishes opening, you will be prompted to register.



Registration Code: The registration code is provided at the time of purchase.

Evaluate: If you do not have a *Registration Code* you may evaluate wce Outlook Contact Manager. Click the Evaluate button. And the *Web reference to Wired Contact (URL)* prompt becomes active for your input. You must enter the URL to your web server that is the parent to the wceAddons directory. From the server example above, you would enter `http://www.testsite.com/wiredcontact`.

Web reference to Wired Contact (URL): This value is set for you when you register. If you are evaluating wce Outlook Contact Manager, you must supply a valid path. See *Evaluate* above.

WCE Username: The username you use to logon to Wired Contact.

WCE Password: The password you use to logon to Wired Contact.

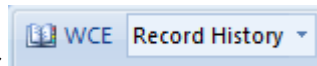
connect: Once you have completed all fields, click connect. Your username and password will be validated against Wired Contact. If valid, the *Finish* button will become available.

Finish: Complete the process and continue to Outlook

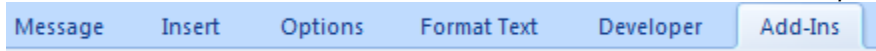
Configuring Client:

1. Create a new message.

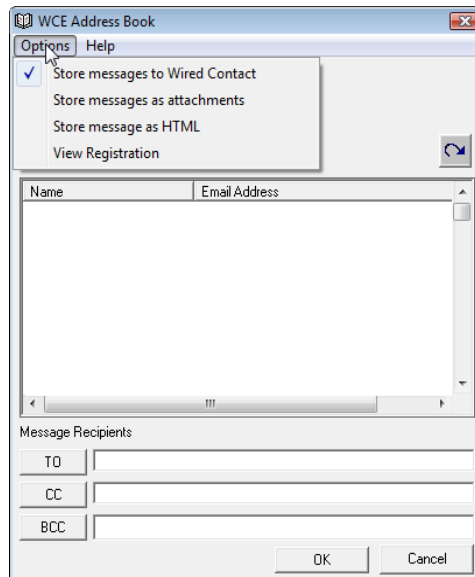
2. Select wce from the toolbar



Note: In Vista, this toolbar is located under the Add-ins tab at the top



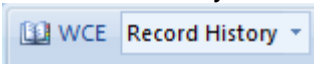
3. Click options



- | | |
|----------------------------------|---|
| Store messages to Wired Contact: | When checked (default) all messages user sends will be stored to the wired contact database if the recipients email address is in the wired contact database. |
| Store messages as attachments: | When checked, the email messages will store as a message file to the wired contact database. When unchecked, messages will store as text. |
| Store message as HTML: | When checked, messages will store in Wired Contact as HTML. This provides existing text formatting however it is not compatible with the edit feature within Wired Contact. |
| View Registration: | You may modify your registration code for those that are using an evaluation copy. |

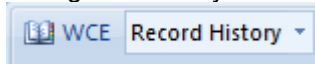
Sending Messages:

- Create a new message, forward a message, or reply to a message.
- You may choose to *Record History* or *Do Not Record History* per message by selecting the desired option



from the menu. The default for this option is dependant on the client configuration above.

- You may use any email address in your personal contact list within Outlook or type in an address manually. If the email address is within Wired Contact, then the message will saved to Wired Contact if the settings are configured to store the message. You may also choose an address from the Wired Contact system by

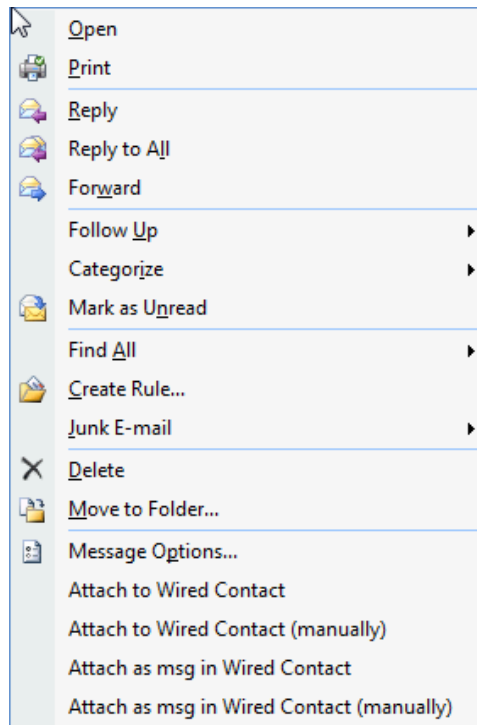


clicking the WCE button to open the *WCE Address Book*.

- The message is stored when it is sent. Please note that messages with large attachments may take a long time to store.

Storing Received Messages:

- Right click on a message or a group of highlighted messages to open the context menu.



- Depending on the client configuration, you will see 2 or 4 additional choices at the bottom of the menu.

Attach to Wired Contact:	Will store the message as text to Wired Contact using the sender as the contact
Attach to Wired Contact (manually):	Will allow you to select a contact to store this message as text.
Attach as msg in Wired Contact:	Will store the message as a message file using the sender as the contact
Attach as msg in Wired Contact (manually):	Will allow you to select a contact to store this message as a message file