

Northwoods Software

Web Prospect For ACT! 7/8/9 User Guide



September 2006
Version 7.4 and later

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Release Notes 7.4

WP6 below refers to either WP (POP) or WP (Outlook) that worked with ACT 6 and earlier.

WP2005 refers to the new product.

Mappings

- WP2005 makes no attempt to import your old mappings from WP6. You'll have to do training over again. (The good news is that it's a lot simpler.)

Accounts

- There is no automatic importing of WP6 mail account info.
- You can't rename or delete Accounts (yet).

Input Handling

- Outlook and POP email downloads are supported in one application.
- For now, the only separator supported is colon, as in

Company: IBM

It's possible to change this, but requires editing a settings file by hand. Ask if you need another separator.

- No support for concatenating multiple form fields into one ACT! field (yet)

ACT 6

- No support for ACT 6 in this version.

ACT 2005/2006

- No Company Support

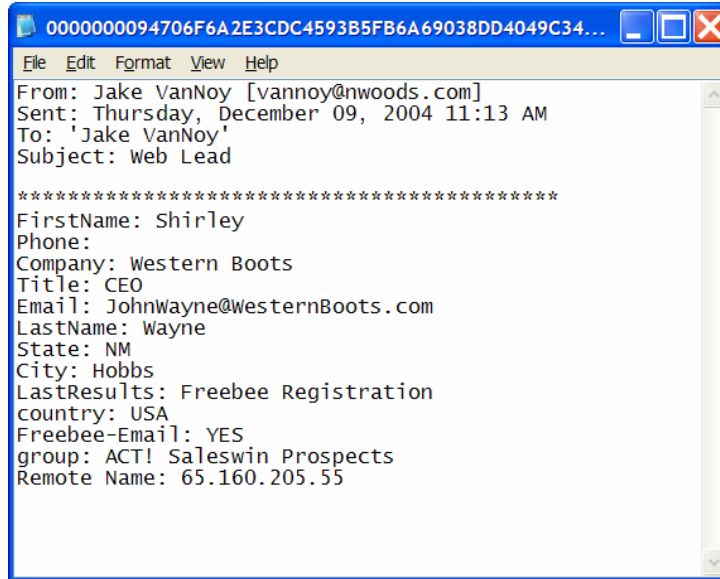
Miscellaneous

- Duplicate lookup and merge is based on E-mail field. This will be more flexible in future.

Web Prospect Overview

Web Prospect for ACT 2005/ 2006 is a completely new version of our successful and popular Web Prospect, which we first created for ACT! version 3.

When someone visits your website and fills in a form, the web site will send you an email that looks like this:



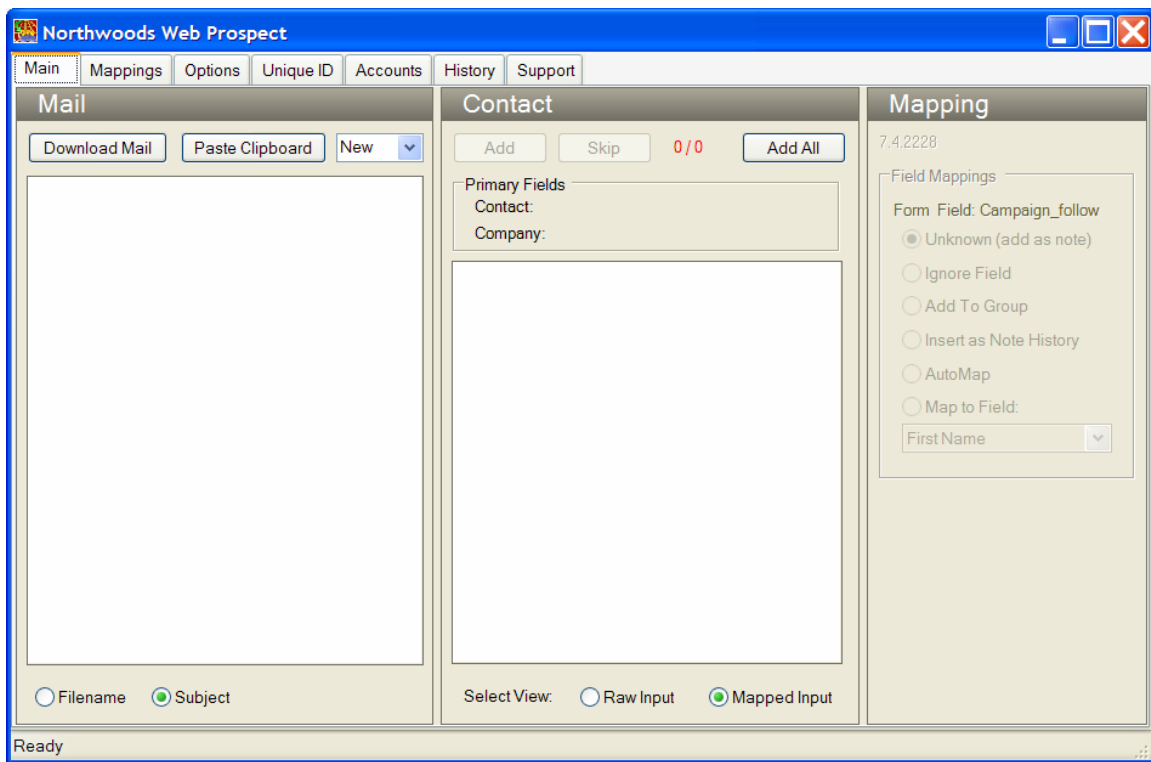
Web Prospect's job is to read this email (either from its own POP mailbox or directly out of an Outlook folder), parse the mail to find the fields, map the fields to the appropriate ACT! fields, and then add or merge the contact data into ACT!.

Running Web Prospect

Currently, WP isn't integrated inside ACT!. You run it from the Start Menu:



The first time the application runs, it will look like this:



Setting up an Account is the first thing to do.

Go to the Accounts Tab and enter your Email and ACT! settings.

Accounts Tab

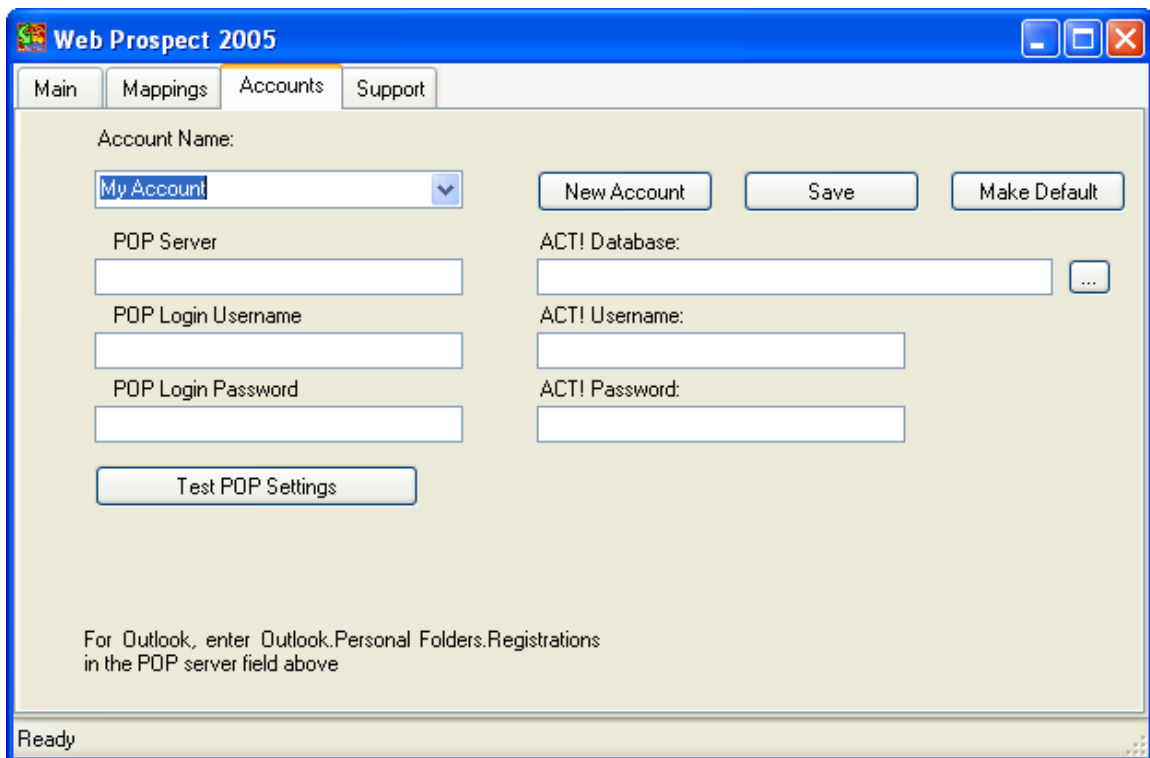
The Account Tab defines where the registrations come and the database where the contacts are created. WP 2005 currently supports direct POP downloading and Outlook as input sources.

Note that the application starts with a blank “My Account” field. You can use that one or create one with a different name. You can create multiple accounts.

Note you do not need to create an account for each form on your web site. WP maps fields on a line by line basis, so you just have to tell it how to map each field from each form. You can then have all the form input data filed in the same Outlook folder or sent to the same mailbox (for POP download).

Note that daily operation of WP is simpler if you just have 1 account and you have all the email from all the forms on your web site mailed to that one account.

Mappings are “global”, they are not specific to each account.



The screenshot shows the 'Accounts' tab in the 'Web Prospect 2005' application. The window title is 'Web Prospect 2005' and it has standard Windows window controls. The interface includes a tabbed menu with 'Main', 'Mappings', 'Accounts', and 'Support'. The 'Accounts' tab is active, displaying the following fields and controls:

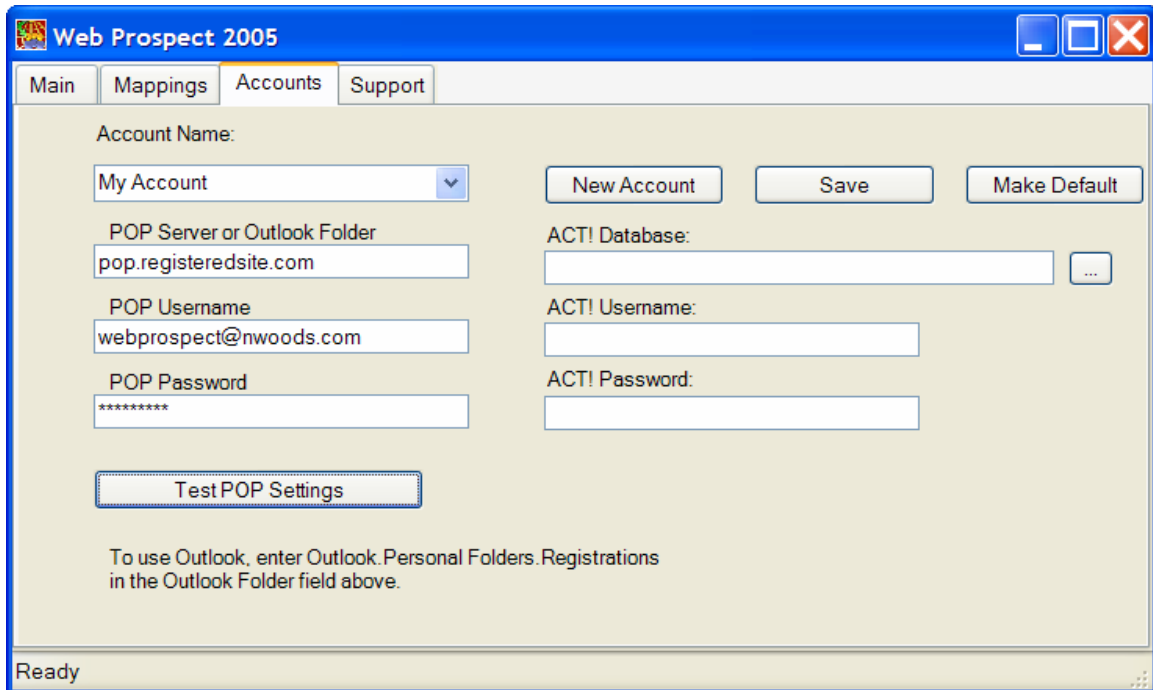
- Account Name:** A dropdown menu currently showing 'My Account'. To its right are buttons for 'New Account', 'Save', and 'Make Default'.
- POP Server:** A text input field.
- POP Login Username:** A text input field.
- POP Login Password:** A text input field.
- ACT! Database:** A text input field with a browse button (three dots) to its right.
- ACT! Username:** A text input field.
- ACT! Password:** A text input field.
- Test POP Settings:** A button located below the POP fields.

At the bottom of the window, there is a status bar that reads 'Ready'. A note at the bottom of the main area states: 'For Outlook, enter Outlook.Personal Folders.Registrations in the POP server field above'.

POP server setup

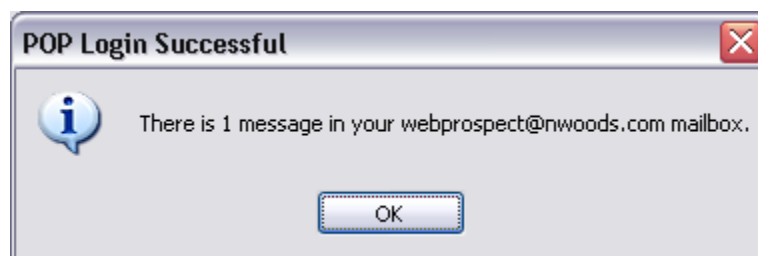
POP settings are required for POP Login Authentication.

Warning: Web Prospect downloads and deletes ALL E-Mail from the POP Username you supply here. Make sure you are using a POP Mailbox just for Web Prospect and not your own Mailbox.



The screenshot shows the 'Accounts' tab in the 'Web Prospect 2005' application. The 'Account Name' is set to 'My Account'. The 'POP Server or Outlook Folder' is 'pop.registeredsite.com'. The 'POP Username' is 'webprospect@nwoods.com' and the 'POP Password' is masked with asterisks. There are also fields for 'ACT! Database', 'ACT! Username', and 'ACT! Password'. A 'Test POP Settings' button is visible. A status bar at the bottom indicates 'Ready'.

Once you have entered the POP settings, Click **Test POP Settings**. You should see:



Outlook 2003 setup

To enable use of Outlook, enter:

Outlook.Personal Folders.Registrations

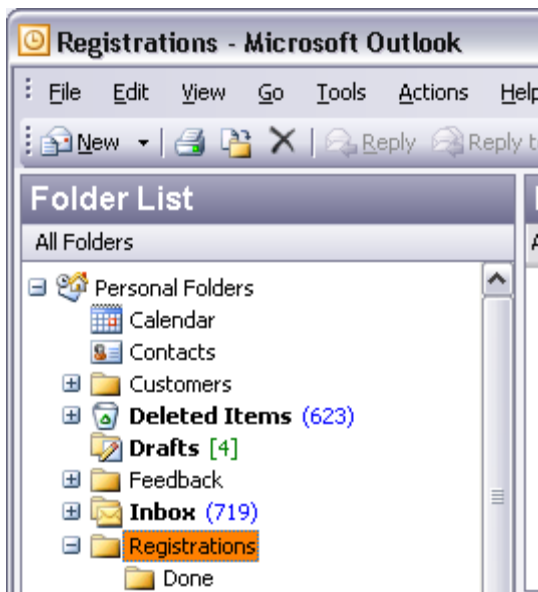
in the POP Server field. (**NOTE:** there is a dot before and after the “Personal Folders”.)

For Outlook, the Username and Password aren’t used.

Note the **Registrations** folder must be a child of “Personal Folders” (i.e. at the same level as Inbox).

If you create a folder named **Done** under the **Registrations** folder, the processed emails will be moved there. If you don’t create the **Done** folder, they are deleted.

Test POP Settings doesn’t work for Outlook.



ACT Database / Username / Password

Required. If you don’t know your ACT! password, just try a blank field.

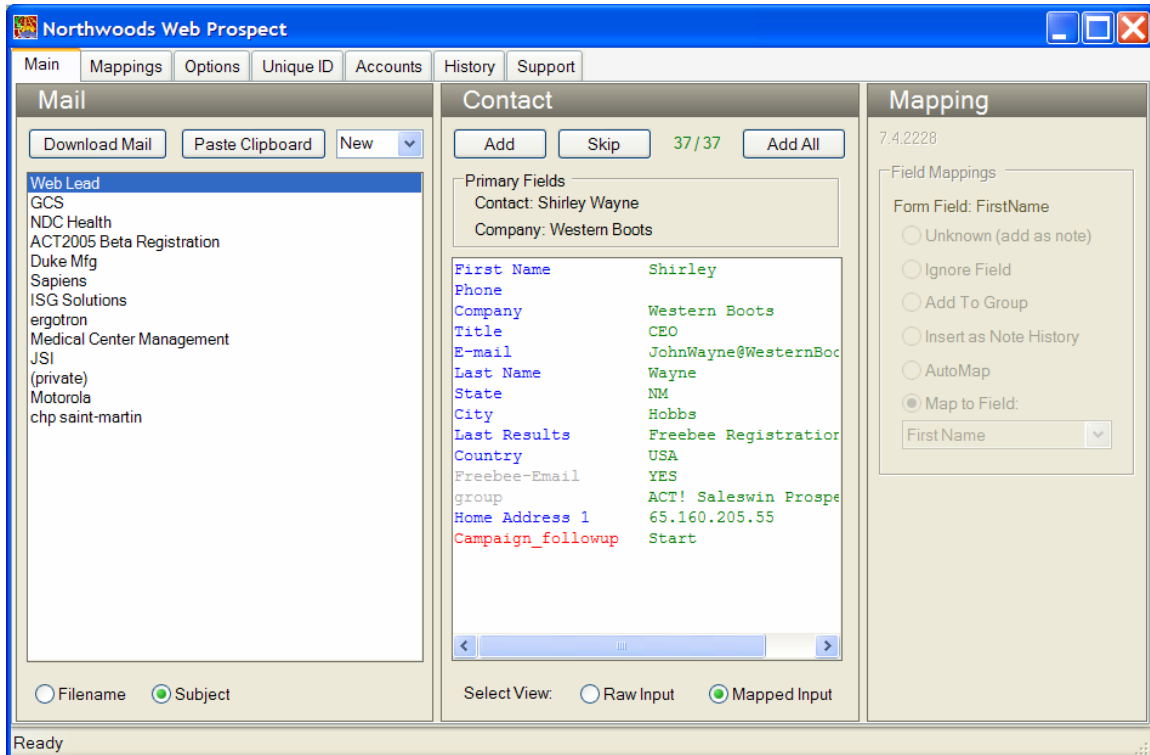
Save.

Be sure to save your changes.

Main Tab

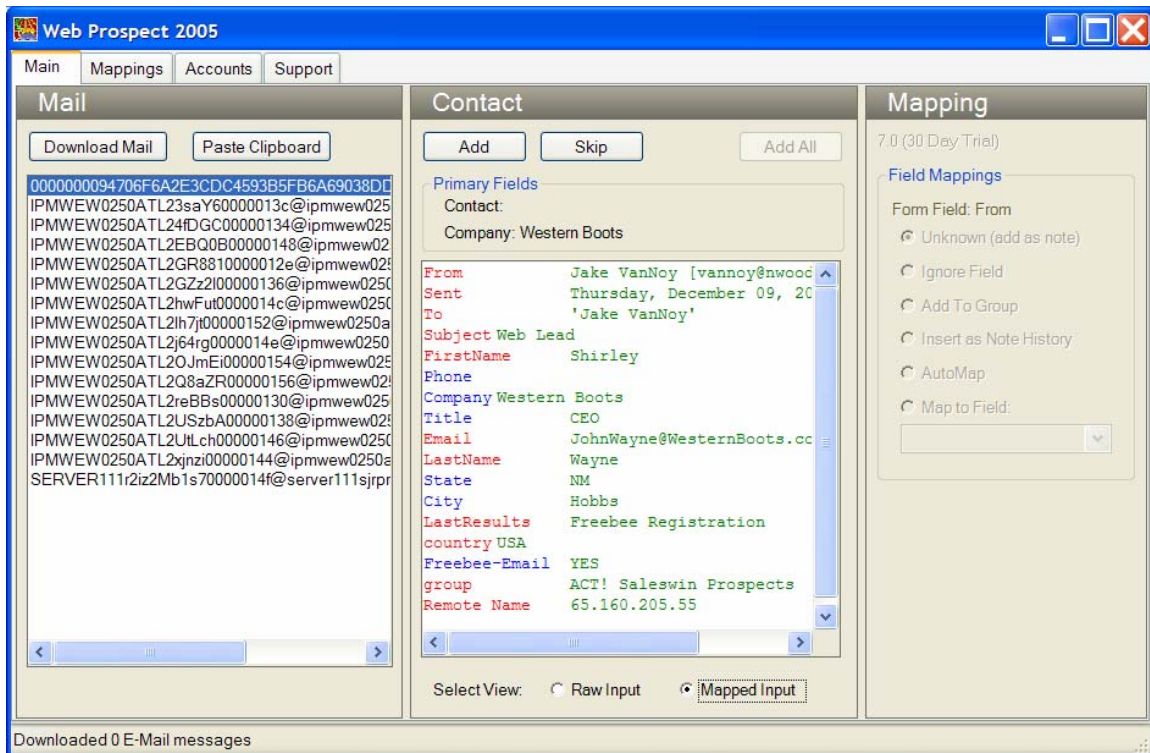
The Main Tab is the tab you will use for most of your interactions with WP 2005. It is where you import the new web form data and where you map fields and add contacts.

Now that you have the Account Tab setup, you can download mail (either from POP or Outlook) into WP. Once you have done that, the Main Tab will look something like this:



Note that we have a list of downloaded Web Form Emails on the left in the **Mail column**. The text that shows is the Subject line from the email downloaded. When you select one of these files in the Mail column, the **Contact column** in the middle shows the contents of the file. Note here we are showing the **Raw Input** view, which is the Email exactly as it arrives.

If we now select **Mapped Input**, we see:



Note now that labels on the left are in **Red** and **Blue** and the values are in **Green**.

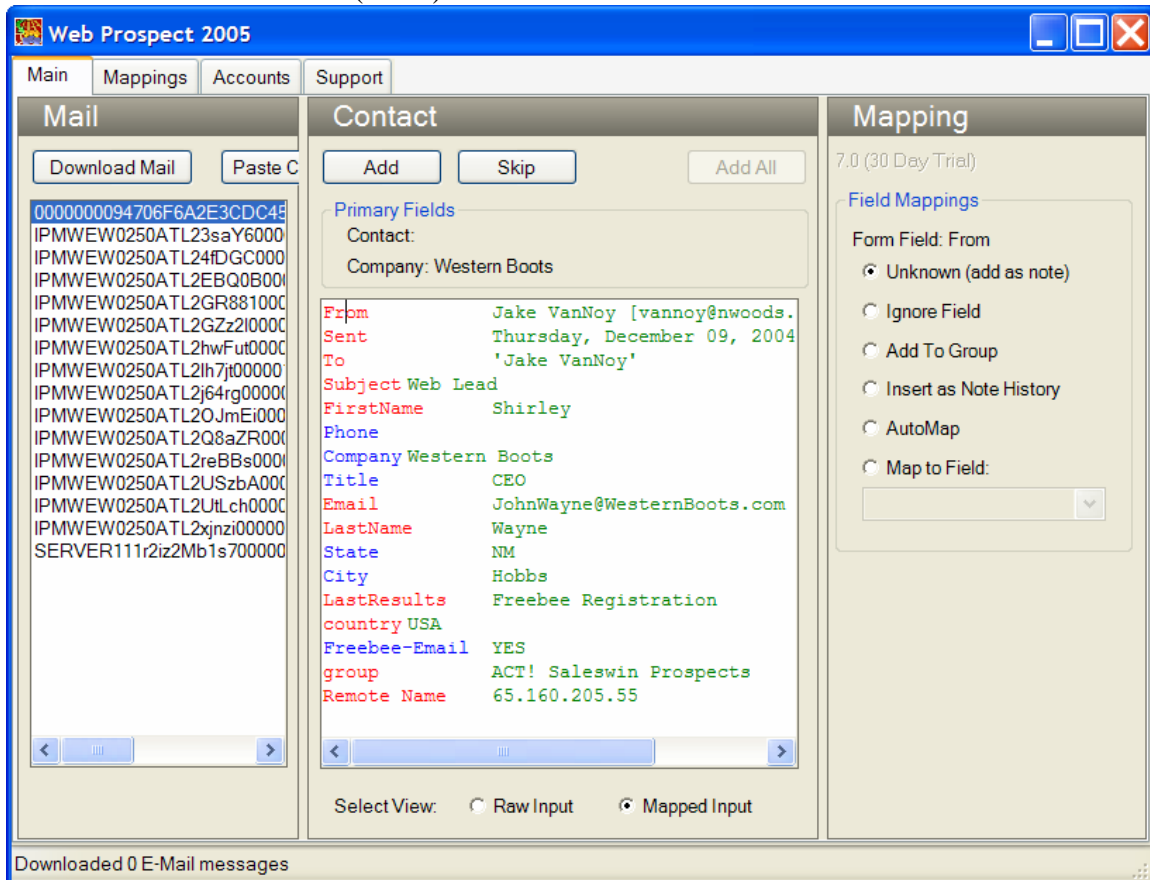
Red labels are fields that don't have any mapping. In other words, WP doesn't know where to put this field if you were to **Add** this contact to ACT!.

Blue labels are fields which have been mapped. Initially, the only fields that are mapped are fields where the label matches exactly between the Web Form field name and the ACT! Contact field name. In the example above, note that **Phone**, **Company**, **Title**, **State**, **City** are all standard ACT! fields, and WP recognizes this. Note also that **Freebee-Email** is also blue, as that field is defined exactly with that name in our ACT! database.

How to handle the Red Field labels

So the setup of WP simply involves telling WP how to handle each line that has a Red label. And, it is simple....

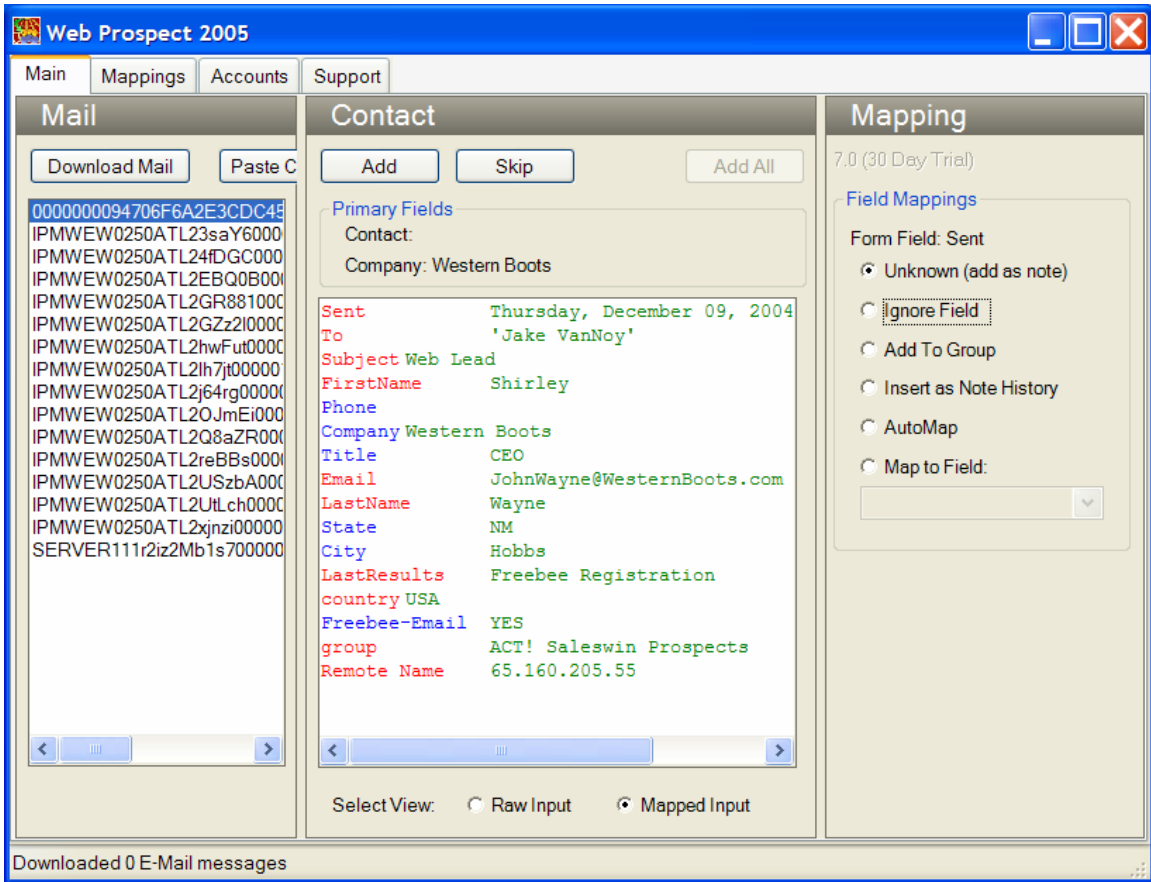
Click on the field red field (**From**)



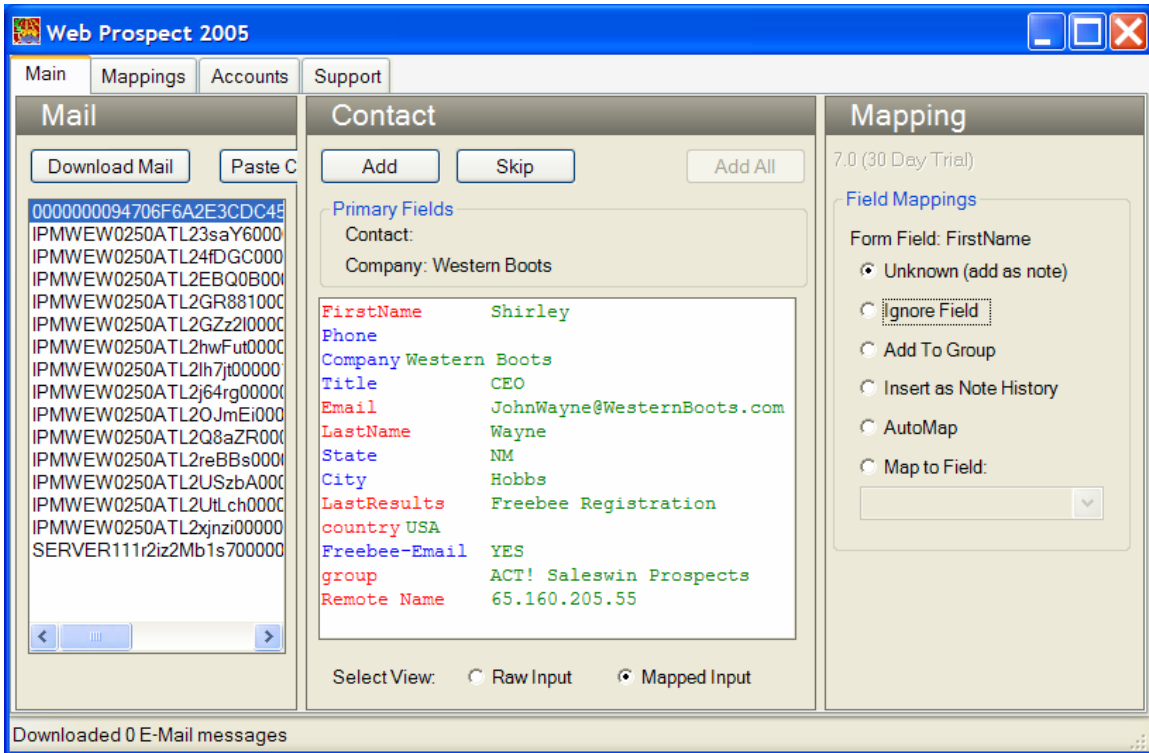
Note that the Mapping Column now becomes active, and it shows the Form Field: Form and that it is an unknown field.

Now, in this case, we want to ignore this line (in other words, we don't want any of the data from this line to show up in the ACT! database). So, click the Ignore Field radio button.

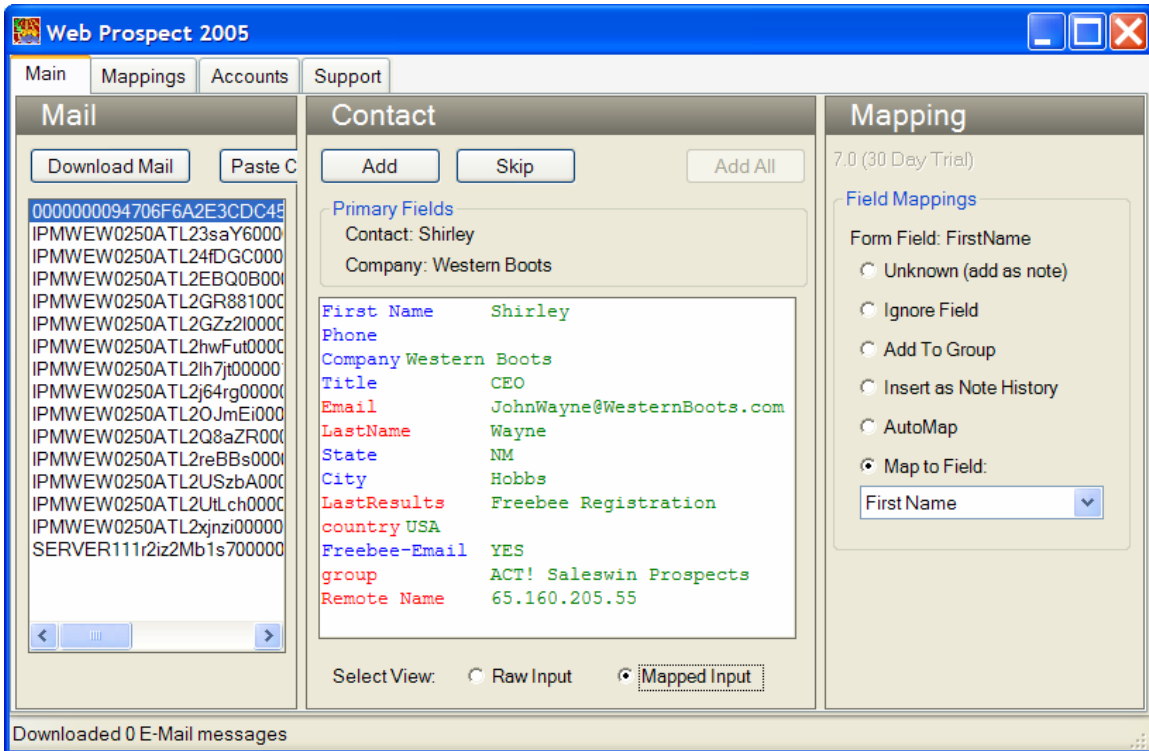
As soon as you do that, the From line disappear and the next line (Sent) is selected. We select **Ignore Field** for **Sent**, **To**, and **Subject**.



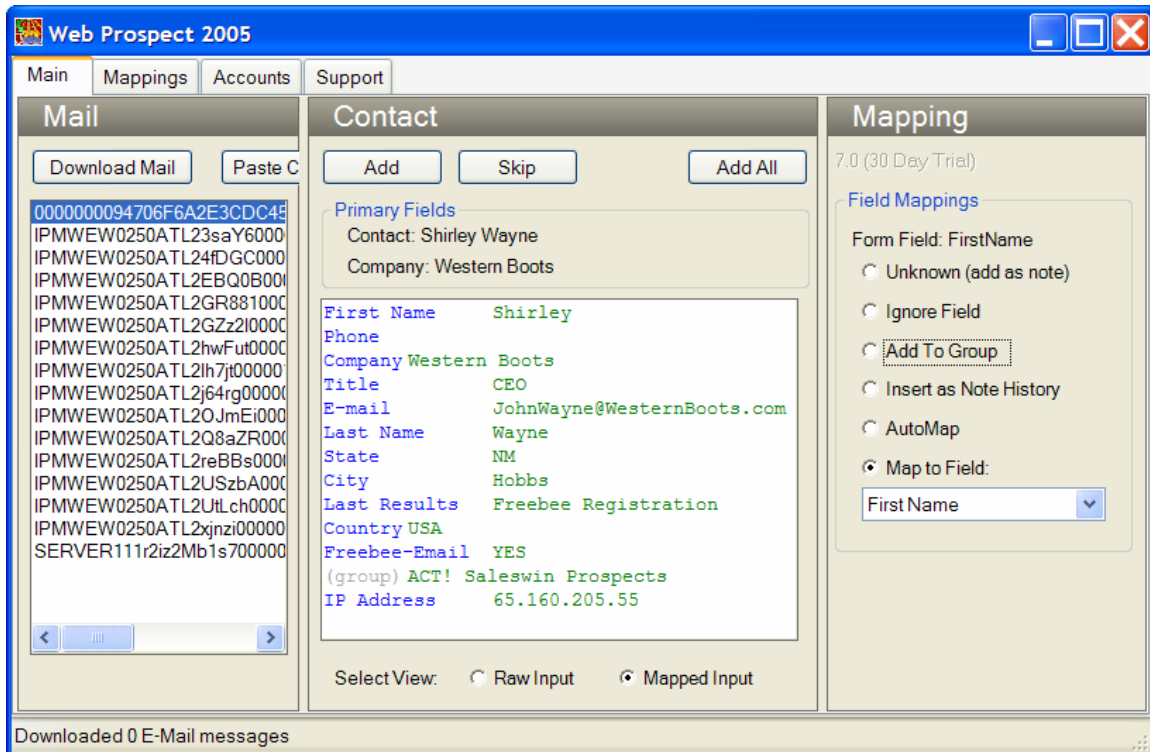
And that brings the state to this:



FirstName should be mapped to the First Name field in ACT!, so we select **Map to Field**, and then First Name from the drop down control.



We continue with **Email**, **LastName**, **LastResults**, **country** and **RemoteName**, and we select **Add to Group** for the **group** field, which results in:



Note the **Primary Fields** area now pulls up a “business card” preview up from the data below.

At this point, this contact is ready to be added to the database by clicking **Add**.

An **Unknown** (red) field will be added as a note if you click **Add** with Red fields remaining. But it is better to map these fields to **Insert as Note History** as WP then is sure what you want and it won't bother you with extra warning dialogs.

The **Automap** radio button is for feedback only. Automap fields will be set automatically, you can't set a field mapping to Automap.

Field Types

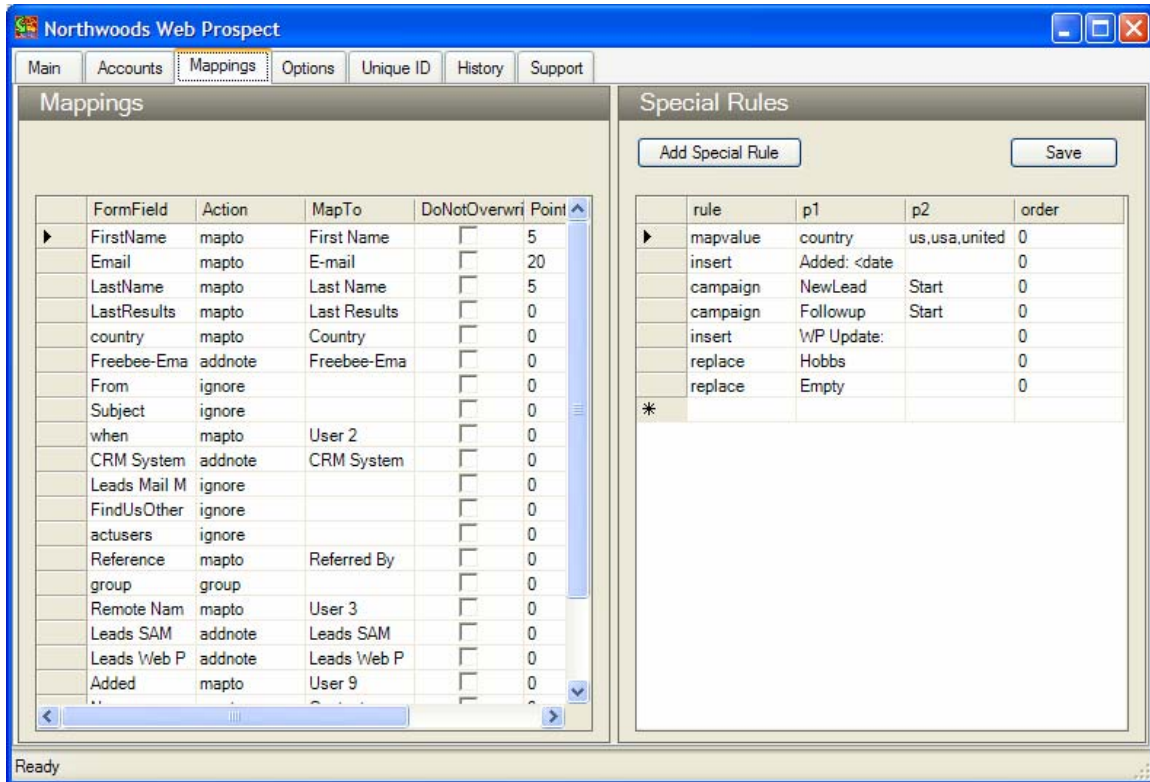
ACT! supports a variety of field data types, including Character , Date/Time, URL, E-mail and Yes/No. Web Prospect supports all of these.

Date/Time fields must convert strings into a valid Date/Time. Allowing the user to type the date into a field on a form allows them to type an invalid Date/Time. If this happens, the “conversion error” will be logged in the Notes section of the Contact that is created.

Yes/No fields support the following values as meaning “Yes”: `y, yes, 1, t, true, on`
(case doesn't matter).

Mappings Tab

The Mappings Tab allows you to see the mappings that you have defined on the Main Page. For the Shirley Wayne example in the previous section, the Mappings Tab now looks like this:



You can, if you get something messed up in the **Mappings table**, simply select the line and hit the Delete key, then **Save** the changes.

Special Rules

Special rules exist to help manipulate form data that doesn't quite match the standard Field: value format that WP expects. Most Special Rules are processed against the raw data before the mappings are done.

- Insert – adds a line at the end of the form
- Replace – an Edit/Replace operation
- Delete line that Starts with – gets rid of unneeded lines in input
- List – maps list of values to separate fields
- Section
- Campaign
- Mapvalue
- ProperCase

-
- UpCase
- DownCase

Note that some of these can be added by using the **Add Special Rule** button on the mappings tab. Other special rules (e.g. List and Section) can be added by typing directly into the Special Processing Rules datagrid.

insert

Useful if you want to add a complete line of input, useful for always setting a particular field to a fixed value.

```
Rule: Insert
P1:   ID/Status: Added by Web Prospect
P2:   <not used>
```

replace

Useful in many ways to “fix up” the data so that the mappings process can work appropriately.

For example, sometimes data doesn’t always have the proper separator character on every line.

```
Name: John Smith
Company: IBM
Request? I would like info on your product
```

The Request? Can be fixed by

```
Rule: Replace
P1:   Request?
P2:   Request:
```

removeline

Removeline deletes **any line that starts with** the value you give for P1.

```
This data is supplied by your leads service
Name: John Smith
Company: IBM
```

```
Rule: removeline
P1:   This data is supplied
P2:   <not used>
```

list

List is a very rarely needed special rule. We've added this feature for our own use, in fact, but don't know of a customer that has needed it.

If you have data that comes in the form:

Interested in: Product A, Product C, Product D

And you want separate fields mapped for each product, you can use **list**.

```
Rule: list
P1:   Interested in
P2:   Leads *: Yes
```

Each item in the list will be substituted into the * location. Thus, this rule will transform the above input into:

Leads Product A: Yes
Leads Product C: Yes
Leads Product D: Yes

And then each individual line can be mapped to a separate field.

Note: WP allows either comma or semicolon (, or ;) as a separator between list items.

Campaign

Add to SAM campaign. P1 is campaign Name, P2 is Stage (defaults to Start)

You may also want to set this to "Do Not Overwrite" mapping style to avoid restarting a campaign when a person re-registers at your website.

Section

Section is useful in some cases where formatting has been added to the input to make it more user-readable at the expense of making it clear to a simple line by line parser.

For example, imagine a form that has Ship To and Bill To info:

SHIP TO

Name: John Smith
Company: IBM
Address: 1 Bigco St

BILL TO

```
-----  
Name: Jane Doe  
Company: IBM  
Address: 14 Main St
```

The problem here is that there are 2 “Name”, “Company” fields, and Web Prospect mappings alone can’t map 1 field name to 2 locations. The section rule comes to the rescue here.

```
Rule: section  
P1: BILL TO  
P2: Billto:3
```

P2 cheats a bit here and is really 2 parameters. It is the prefix to apply to the lines in the section, and the “3” in this case says to apply this rule to the next 3 lines. This will transform the input to:

SHIP TO

```
-----  
Name: John Smith  
Company: IBM  
Address: 1 Bigco St
```

BILL TO

```
-----  
BilltoName: Jane Doe  
BilltoCompany: IBM  
BilltoAddress: 14 Main St
```

So now each line of the input can be mapped to separate fields in the contact.

MapValue

This special rule is done AFTER the mapping step, so the fieldnames have been mapped to the ACT! fieldnames before this rule is processed.

```
Rule: mapvalue  
P1: An ACT! Fieldname  
P2: a,b,c;AAA,BBB,CCC
```

Examples:

```
Mapvalue Country us,usa,uk;United States,United States,United Kingdom  
Mapvalue sendmail no;unsubscribed
```

P2 is 2 comma separated lists, separated by a semicolon. The first list is the “from” values and the second list is the “to” values. The first list is case insensitive when the comparisons are made, but the values in the second list are applied as you specify them.

ProperCase, UpCase and DownCase

This special rule is done AFTER the mapping step, so the fieldnames have been mapped to the ACT! fieldnames before this rule is processed.

```
Rule: propercase (or upcase or downcase)
P1: An ACT! Fieldname
P2: not used
```

Example: Propercase on Contact field...

Contact: john wayne

Will result in

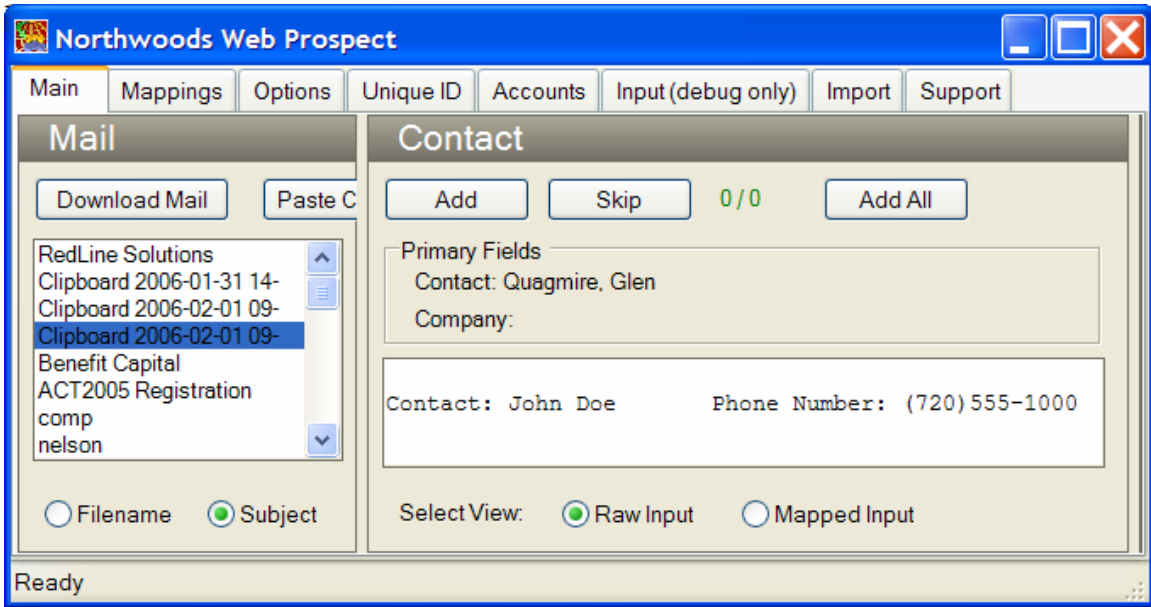
Contact: John Wayne

Handling multiple fields on one line

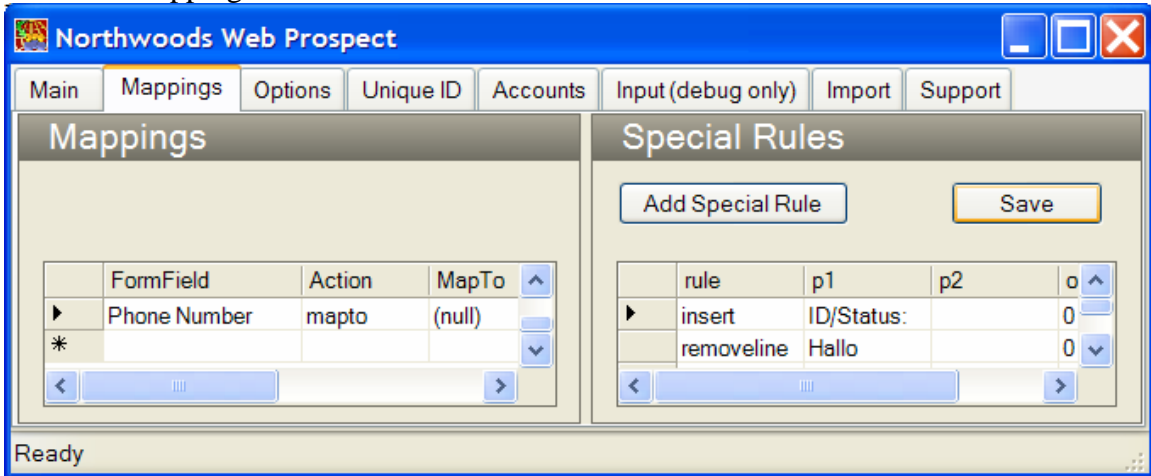
Web Prospect assumes that each **field: value** is on a separate line, but there is a way to handle things like this:

```
Contact: John Doe           Phone Number: (720)555-1000
```

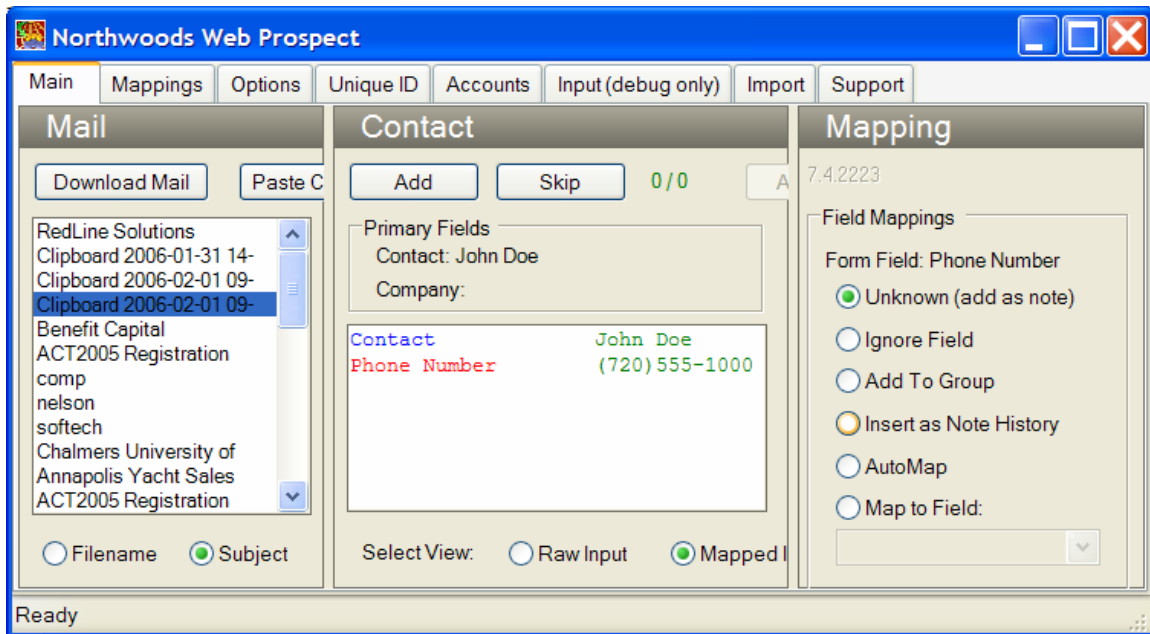
By default, Web Prospect will handle this as a full line of data for the **Contact** field. But, if there is a **mapto** record for **Phone Number** in the mappings table, then the line will be broken into two lines as it is processed.



Go to the mappings tab and enter:



Entering the FormField name and Action of mapto is enough. **Click Save.** Go back to the Main tab.



Now you can complete the mapping by clicking the Phone Number line and using the Field Mappings panel.

Note: you could just enter the MapTo into the table on the Mappings Tab, but you risk typing the name of the ACT! contact field incorrectly if you do that.

An alternate way to do this

Edit the file with multiple values per line to create a new well-formed input file, and then do the mapping with that file. For example edit the file:

```
Contact: John Doe           Phone Number: (720)555-1000
```

To be

```
Contact: John Doe
Phone Number: (720)555-1000
```

And then do the mappings on the new file. For any field that “automaps”, you will need to do a real “mapto” mapping (e.g. Phone mapto Phone) so that WP can pick the field name out when you start processing the files with multiple values per line.

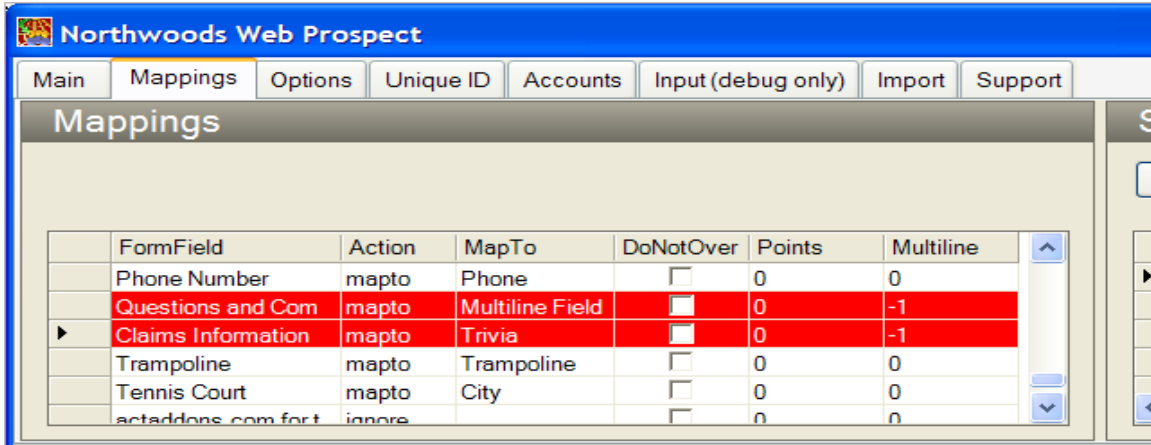
Handling multiline input

By default, WP assumes that all the data for one field is on one line. However, there are form fields that can prompt for multiline input. And ACT 2005/2006 support “Memo” fields which are also multiline.

After setting up the mapping on a multiline field, go to the Mapping tab and go to the multiline column for that mapping. Put the value -1 into the multiline column.

The value -1 tells WP to “read lines until you see another line with a separator”.

You can map multiline fields to ACT! “Memo” Contact fields or to AddNote.

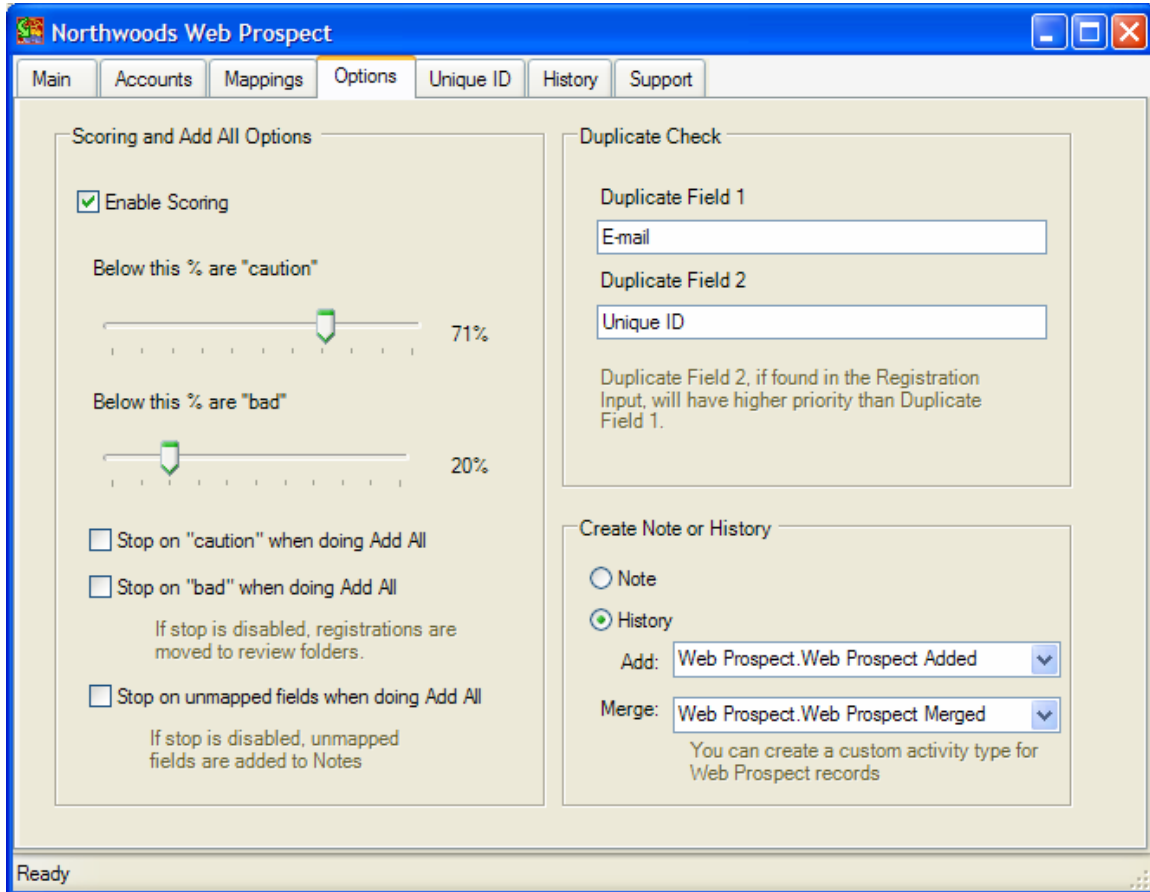


The screenshot shows the 'Northwoods Web Prospect' application window with the 'Mappings' tab selected. The 'Mappings' window contains a table with the following data:

FormField	Action	MapTo	DoNotOver	Points	Multiline
Phone Number	mapto	Phone	<input type="checkbox"/>	0	0
Questions and Com	mapto	Multiline Field	<input type="checkbox"/>	0	-1
Claims Information	mapto	Trivia	<input type="checkbox"/>	0	-1
Trampoline	mapto	Trampoline	<input type="checkbox"/>	0	0
Tennis Court	mapto	City	<input type="checkbox"/>	0	0
actaddons.com for t	ignore		<input type="checkbox"/>	0	0

Options Tab

The Options Tab gives you control over Scoring Contact data, Duplicate Checking and Note/History entries.



Options Tab – Scoring input

Scoring the quality of input is a great aid in automating nearly complete hands-off operation of Web Prospect. On the Mappings Tab, you can set the “Points” that particular mapped fields are worth.

So, if you pick:

Company: 5 points

Contact Name: 10 points

Email: 20 points

You have a possible 35 points, and the score is computed from that. Note that is someone types stuff like ASDFASDFKJLJFW, Web Prospect is pretty smart about not counting that as a real name.

Options Tab – Duplicate Merging

Duplicate checking in Web Prospect is simple by design. To allow unattended operation, duplicate matching must be exact, as it isn't appropriate to stop to ask if a merge should be made. There is no multi-field (e.g. Company, Contact Name) style matching because it is our experience that people just aren't consistent enough when they enter data on a web form a second time.

WP does allow matching on 2 separate fields, with Duplicate Field 2 being higher priority than Duplicate Field 1. This is useful if some of the data coming into WP is the result of a Mail Merge to an existing client. You can pass the "unique id" out of the database through the email, so that it can be passed back to WP when the data returns. (This is going to require some level of technical sophistication / web site programming.)

For example: a link can be done to

<http://mywebsite.com/survey.asp?id={{Unique ID}}>

and that ID can then be returned to WP via the ASP page.

Or it might be used in a similar way with an "Unsubscribe" link.

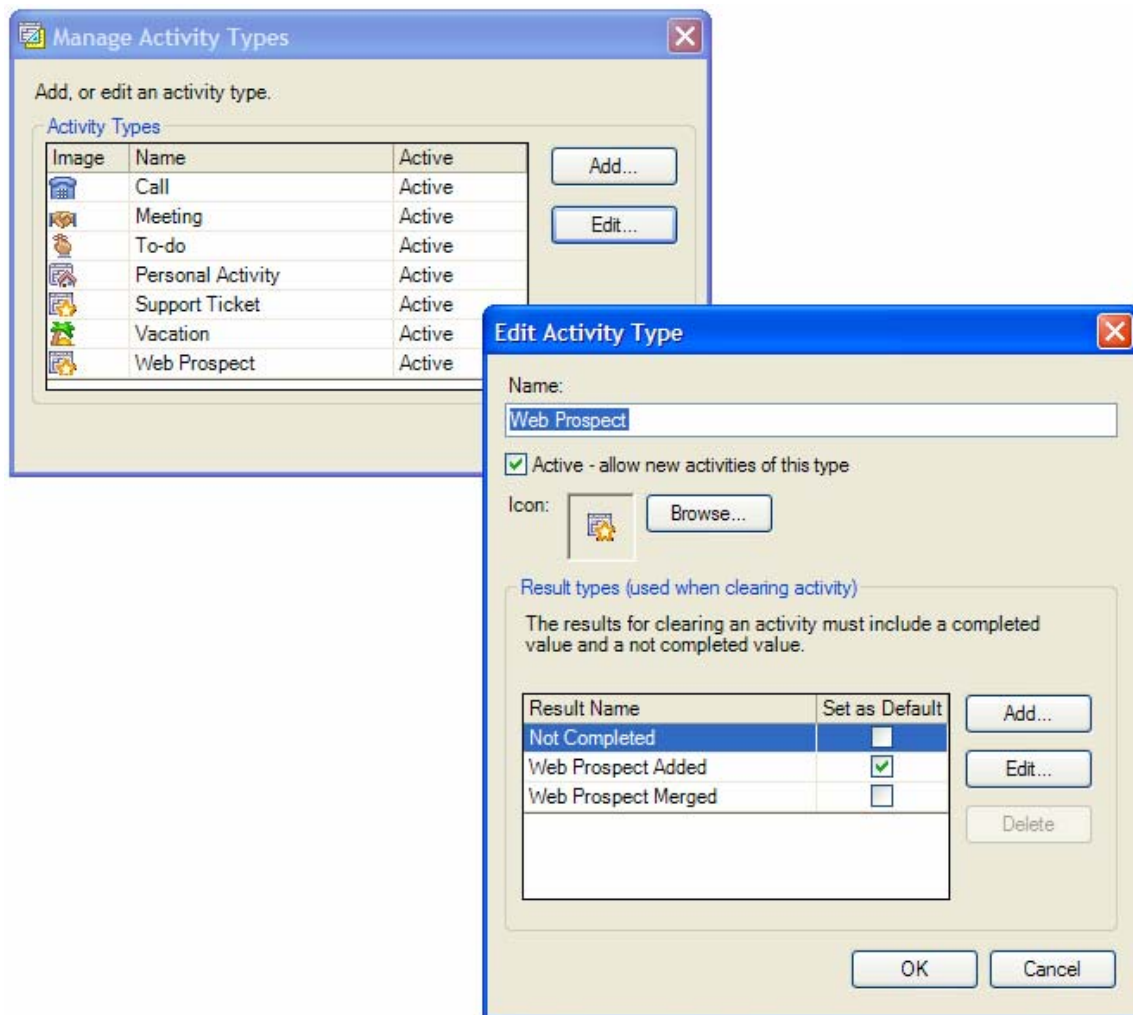
Options Tab – Note or History

You can choose whether items that are mapped to “AddNote” and unmapped data is logged in a Note or a History Record. If you choose History Record, then you can use Custom Activity Types to create a specific Web Prospect Log history Record.

Within ACT!, choose Schedule > Manage > Activity Types...

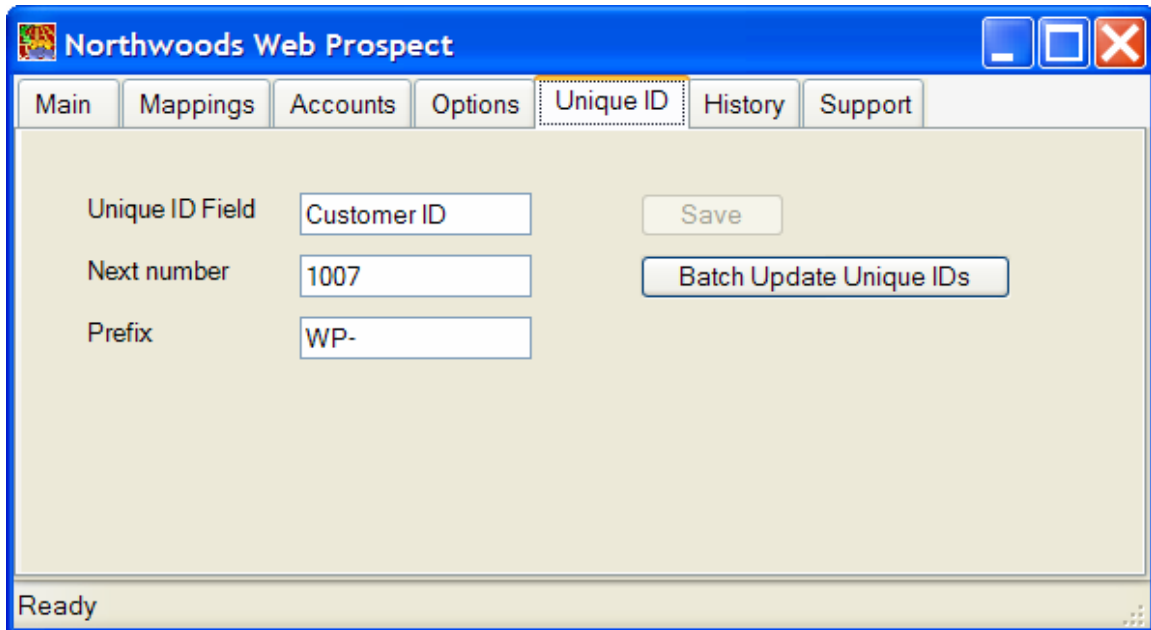
Add a new type called “Web Prospect”, then Edit... that type and change “Completed” to something like “Web Prospect Log”.

Then, when you start up Web Prospect and go to the Options Tab, this Activity Type will be available under the “History” choice. You can create one activity type for Web Prospect and use that for Added and Merged records, or you can create separate Result Names, as shown below. (it seems you can’t delete the “Not Completed” Result.)



Unique ID Tab

The Unique Tab can be used to tag each contact with a unique identifier (or customer id).



The screenshot shows a window titled "Northwoods Web Prospect" with a menu bar containing "Main", "Mappings", "Accounts", "Options", "Unique ID", "History", and "Support". The "Unique ID" tab is active. The interface includes three text input fields: "Unique ID Field" with the value "Customer ID", "Next number" with the value "1007", and "Prefix" with the value "WP-". There are two buttons: "Save" and "Batch Update Unique IDs". The status bar at the bottom indicates "Ready".

Enter a Contact Field name in the **Unique ID field**. The **Next Number** is the next number that will be used for a Unique ID. This number is incremented each time a Unique ID is assigned. Optionally, the **Prefix** field can be used to make the Unique ID written to the contact like WP-1007.

Batch Update Unique IDs will run through the entire current Account database, and check each Unique ID field. If the field is blank, it will assign the Unique ID and increment the Next Number.

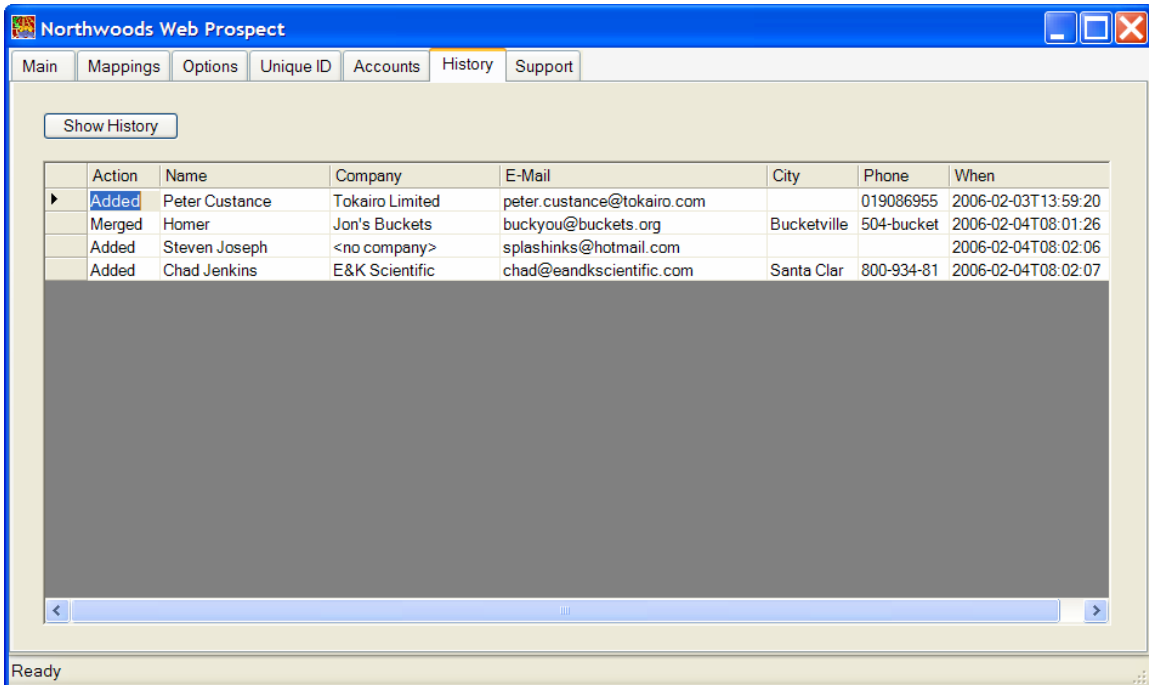
When Web Prospect Adds a contact, it will also set the Unique ID field (e.g. Customer ID) in the contact as long as the field name exists in the database.

To turn off Unique ID feature, just clear the **Unique ID Field** text box and click Save.

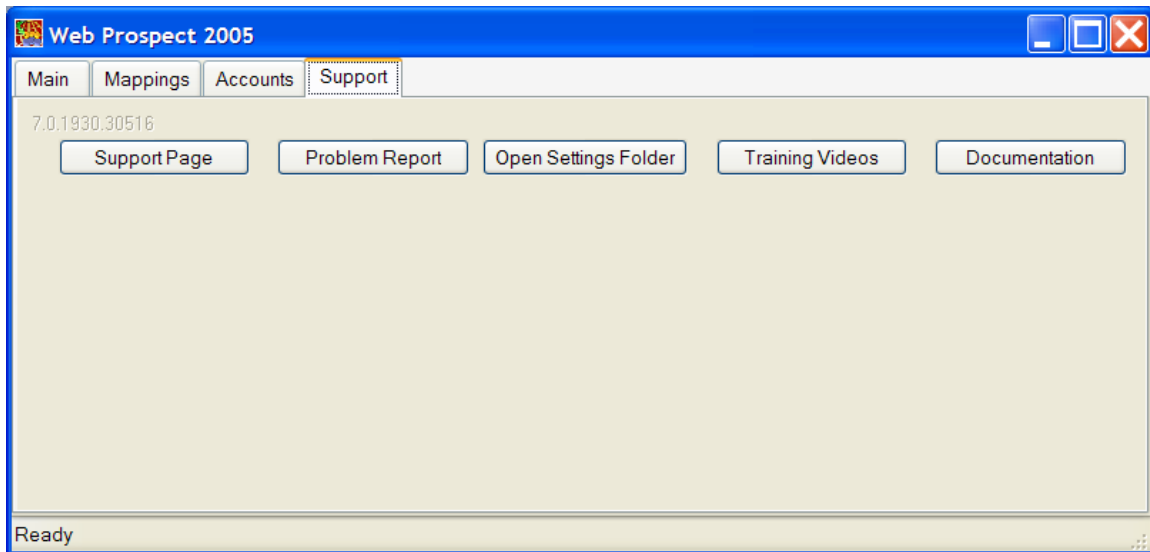
History Tab

The History Tab will show you the history of contacts either Added or Merged into the ACT! database.

You must click Show History.



Support Tab



The **Support Page** and **Problem Report** buttons open up appropriate pages on www.nwoods.com.

Open Settings Folder opens the folder where WP2005 stores the mappings.xml, account.xml and settings.xml files.

Our ACT 6 add-ons used a saleswin.ini file to remember settings. For our new add-ons, we are using XML encoded file. You can still edit them with Notepad, but you should be careful.

The files are stored in

C:\Documents and Settings\<<Name>\Application Data\Northwoods Software\WebProspect2005

For Web Prospect, there are 3 files:

1. Settings.xml – DefaultAccount and other global settings
2. Account.xml – the accounts tab settings
3. Mappings.xml – the field mappings and other special parsing data

The **Documentation** button opens this file.

Running WP unattended

Web Prospect can be run interactively or unattended. We recommend that once you have the mappings set up and the scoring set up, you run it interactively for a week or so after setting it up to adjust the settings for the scoring.

To run unattended, you need to turn all the “Stop on...” options off. When you do this, the “Bad” Registrations will be moved to the Bad folder, and likewise with the “Caution” registrations. Unmapped fields will be added as a part of the Note that is created.

You should run WP every few days (whatever is appropriate for your business) and check the “Bad” and “Caution” folders.

There are 2 ways to run unattended.

1. Click the **Add All** with the Shift Key down... this will put WP into a “run forever” mode. It will download mail, do an Add All and then wait 10 minutes.

If you minimize WP in this mode, it will create an icon in the notification area of the taskbar.

2. Run WP from the command line.

```
"C:\Program Files\Northwoods Software\Prospect\Web Prospect.exe" run "acc"
```

The **run** command will put WP in the same mode that **shift-Add All** does, running every 10 minutes. The optional “Acc” parameter is the Account name.

```
"C:\Program Files\Northwoods Software\Prospect\Web Prospect.exe" runonce "acc"
```

The **runonce** command will cause WP to do one Download/Add All and then exit. This can be used in combination with the Windows scheduler to run WP at certain times of day.

If you need to run WP for more than one input mailbox or more than one ACT! database, then use runonce multiple times with different accounts.

NOTE. We don't recommend trying this if you are using Outlook with WP. Only use unattended operation with POP input. Outlook security prompts will prevent you from using WP with Outlook in an unattended mode.

End of WP 2005 User's Guide.