INTERACTION LIST EXPORTER

# Installation Guide: v2.6.x

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# 1. INTERACTION LIST EXPORTER V2.6.X

## 1.1.　　Introduction

This document is to guide you through the installation of the InterAction List Exporter v2.6.x application.

## 1.2.　　Prerequisites

Please refer to the prerequisites document for integrating Concep Send with LexisNexis InterAction.

To complete this installation you will need:

- Proxy Server details, if one is in use
- An InterAction admin account username and password
- The windows user that normally accesses InterAction on the machine List Exporter is being installed on.
    - → This account must be given admin permissions and used to install List Exporter. This allows the IntrActn.ini file of this user to be updated automatically. If any other windows user is used, then their IntrActn.ini files must be manually updated. Likewise, if multiple users access InterAction on this machine then their individual ini files must be manually updated. (See section 1.7 for information on manually updating the ini file.)

## 1.3.    Installation

You will have been provided with a zip file containing the files required to install InterAction List Exporter. Extract the contents of the zip file on the client you are to install on.

*NOTE: InterAction List Exporter cannot be installed from a UNC path, and must be run from a local disk.*

The installation must be carried out by an account with local admin rights on the client (i.e. the ability to install the InterAction List Exporter application).

- Right click on the extracted file and click properties. If you see the button 'Unblock' click it and save the change.

- Open the file and right click on the .exe file. If you see 'run as administrator, please use this option, otherwise double-click on the .exe file to begin the installation. The following screen will be displayed



- Click 'Next' to commence the installation

- You will be presented with the Installation Options available to you

    → An InterAction Services menu shortcut is created automatically

    → Choosing to create log files will keep an audit trail of all exports carried out from your installation. If you choose this option, you will be able to specify where these log files are stored later in the installation wizard

- Check the box if you would like to create log files (note that creating log files is recommended for a new installation to assist in testing and troubleshooting)
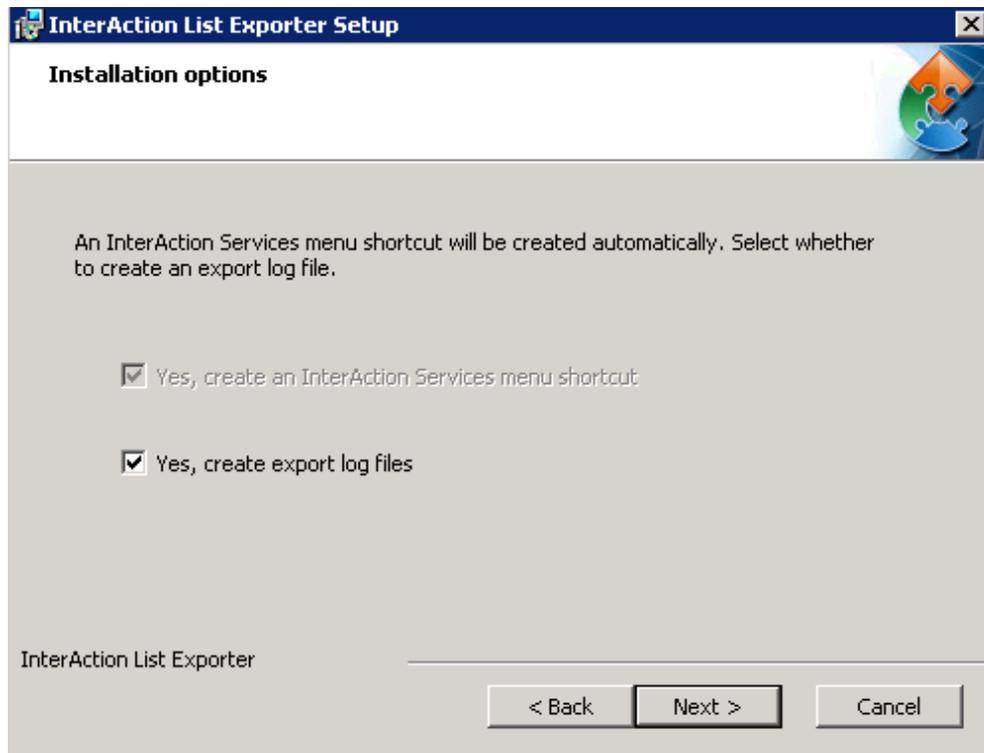


- Click 'Next'

- The next step allows you to specify where the application will be installed

- Click on 'Browse' to select the location, or manually enter the location in the field provided
  → Please make sure the windows user you are installing with has full read/write controls of this file location
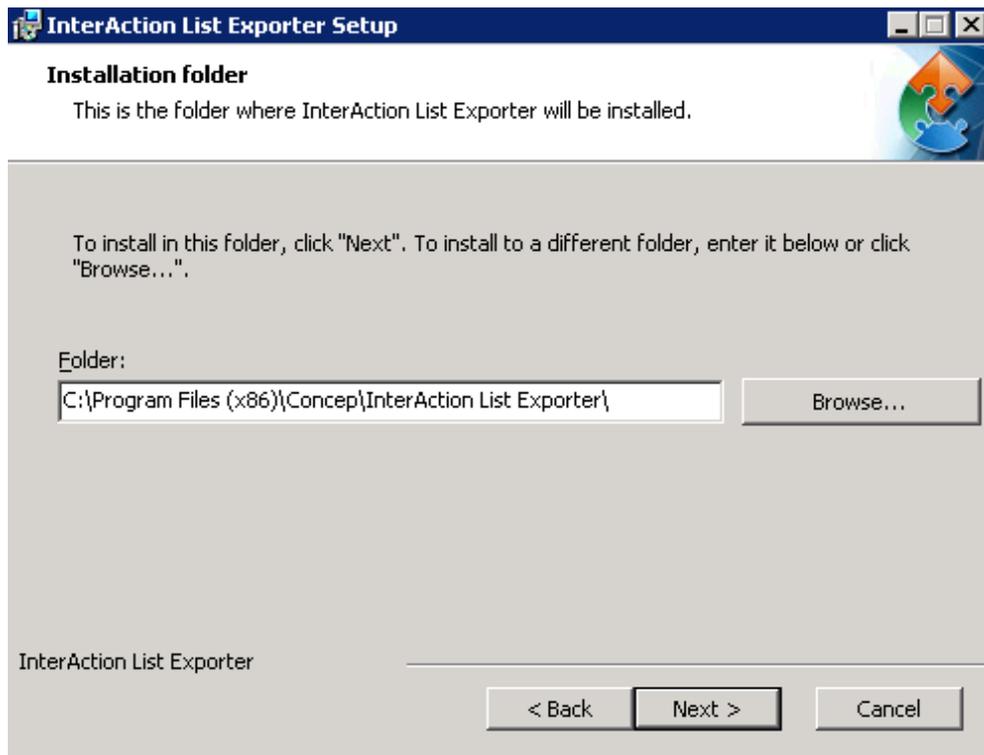
- Click 'Next'

- The next step allows you to specify where the master IntrActn.ini file is located
  - → Note that for List Exporter to function correctly, the settings.xml file will need to be **written to** by the user using it. For this reason, in some environments Program Files etc may not be the appropriate location to use. Please ensure that the user you are installing for has **write** permissions to this location.

- Click on 'Browse' to select the location, or manually enter the location in the field provided
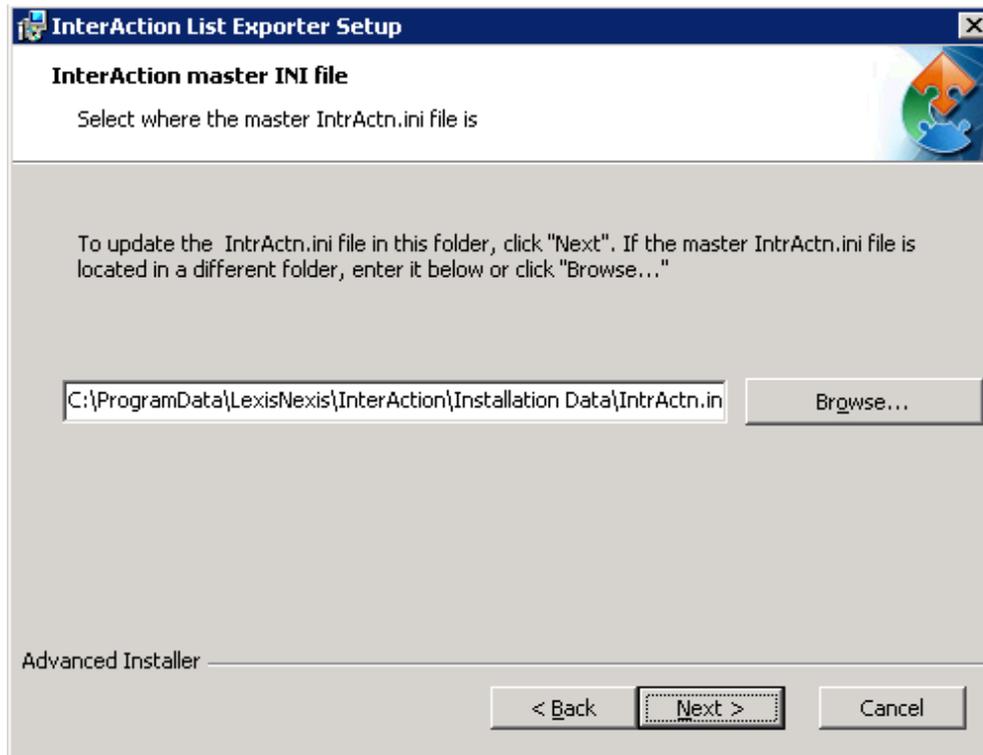
- Click 'Next'

- The next step allows you to specify where the settings file will be installed
  → Note that for List Exporter to function correctly, the settings.xml file will need to be **written to** by the user using it. For this reason, in some environments Program Files etc may not be the appropriate location to use. Please ensure that the user you are installing for has **write** permissions to this location.

- Click on 'Browse' to select the location, or manually enter the location in the field provided
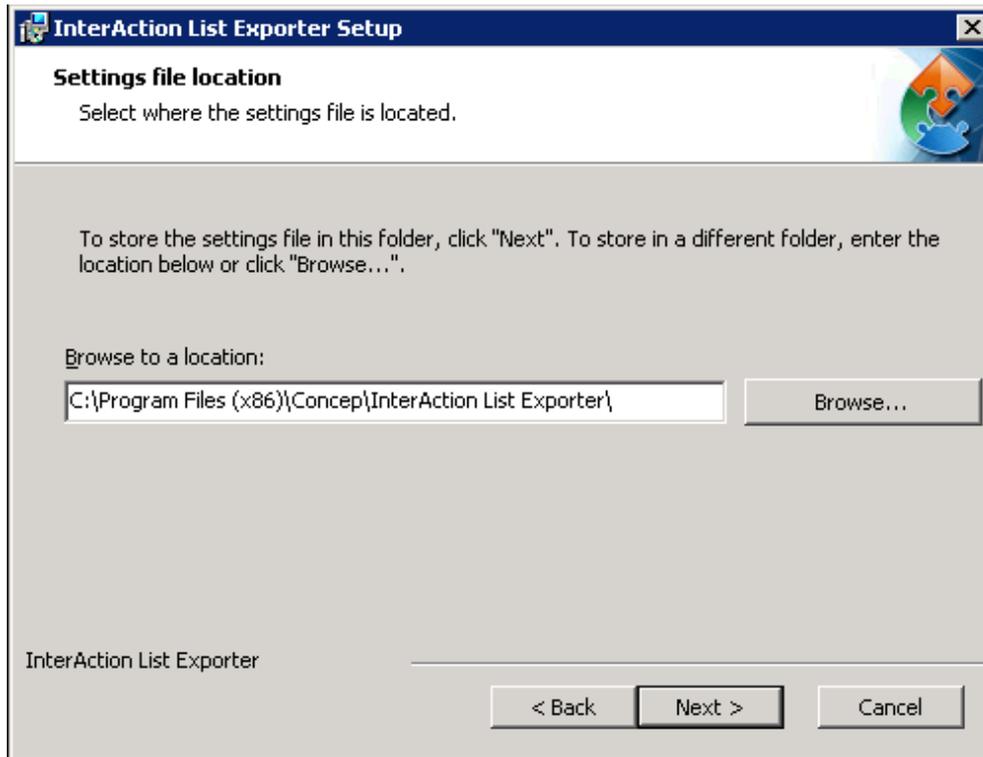
- Click 'Next'

- If you have chosen to create log files, the next step allows you to specify where the log files will be stored

- Click on 'Browse' to select the location, or manually enter the location in the field provided
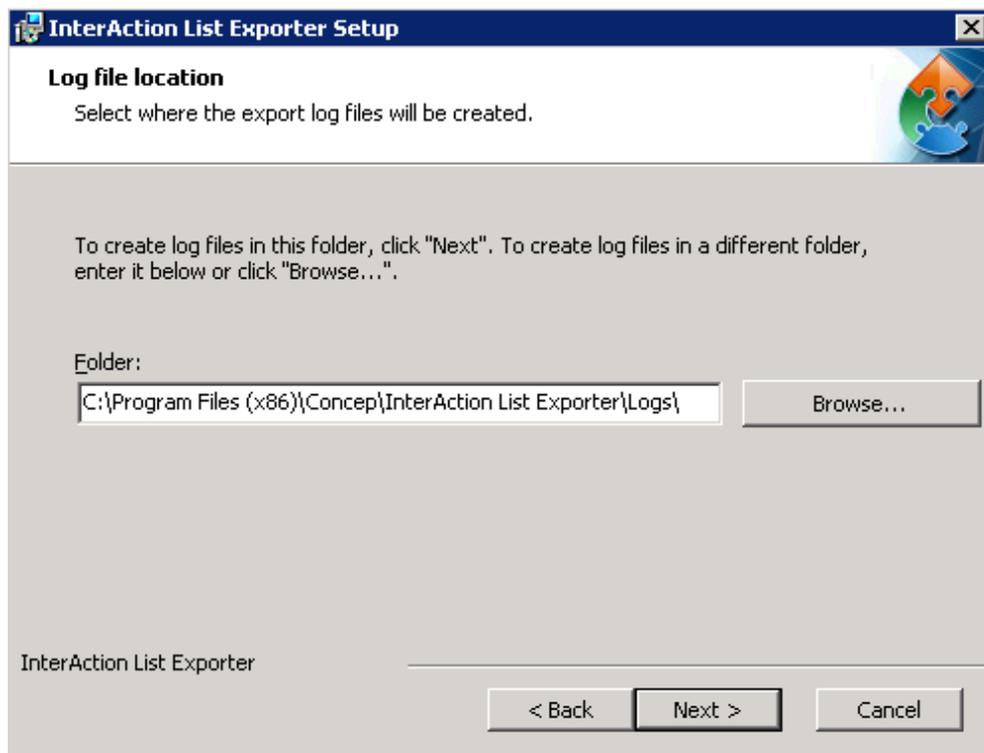
- Enter the name your organisation uses to refer to 'Concep Send' in the EMS name field

- Enter the wording for the InterAction Windows Client Services menu entry e.g. 'Share with Concep Send'
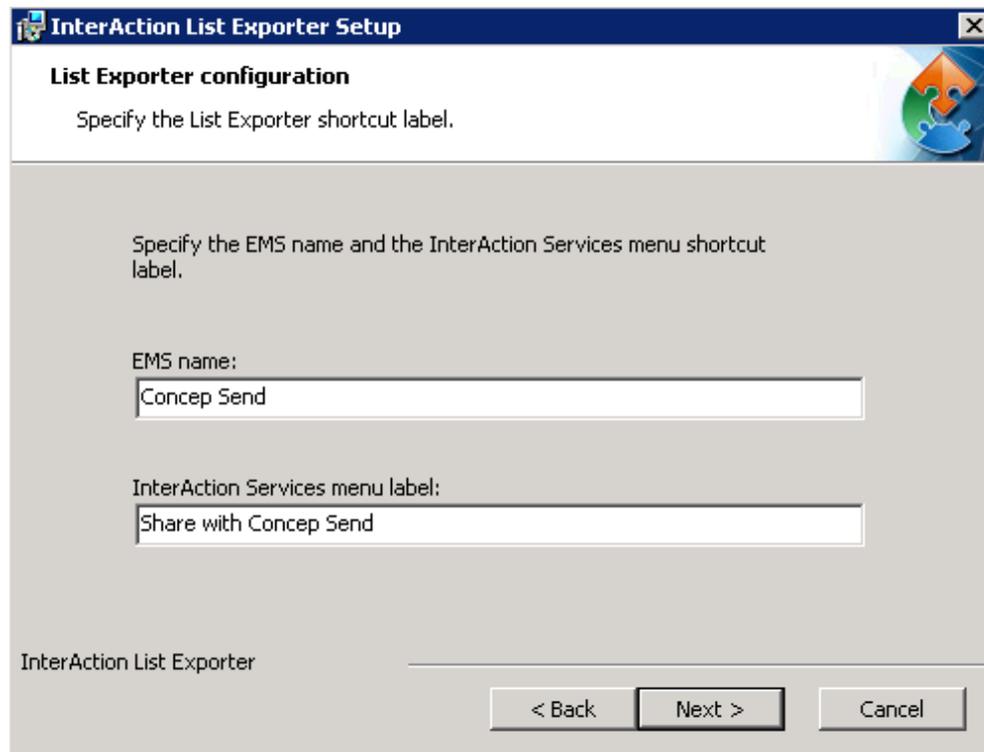
- Click 'Next'

- If your organization uses a custom login domain for Concep Send, enter it in the 'Concep Send URL' field

- There is no need to modify the 'Concep Send API URL' field

- If you would like to prepopulate the Concep Send Username for a user, so that they do not need to enter it themselves the first time they use the List Exporter, enter it in the 'Username' field
  - → This is optional, because users will have the opportunity to enter the username when carrying out an export

- If you would also like to prepopulate the corresponding password for that account, enter it in the 'Password' field
  - → This is optional, because users will have the opportunity to enter the password when carrying out an export
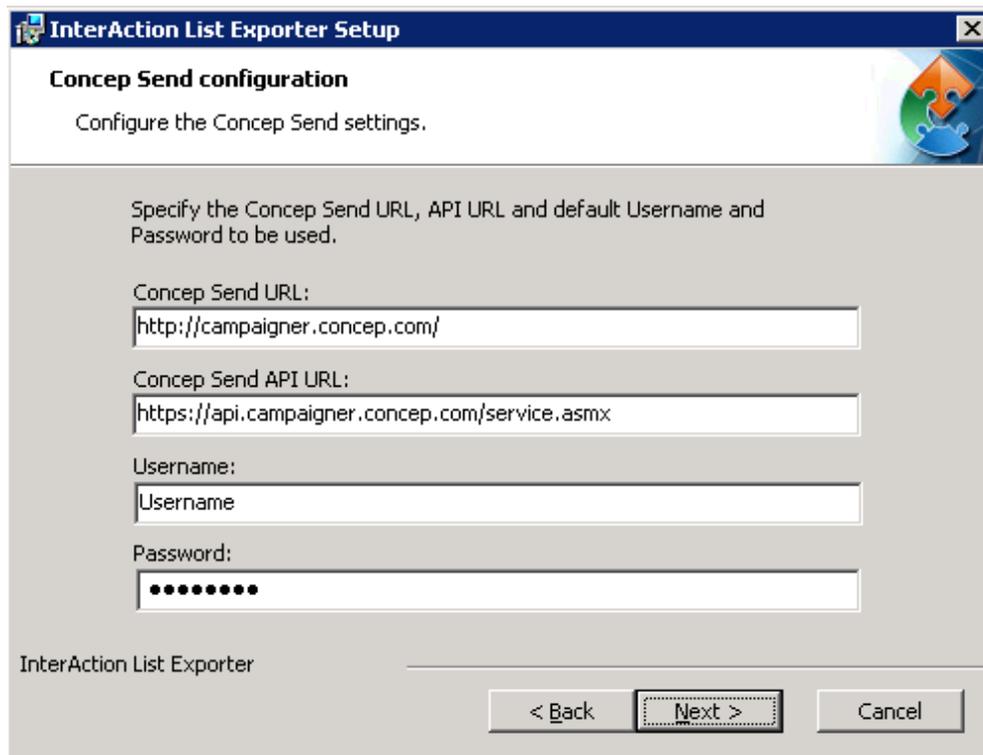


- Click 'Next'

- In order for an export to be completed correctly, it must be possible to connect to the Concep Send API URL entered on the previous screen. It may therefore be necessary to configure List Exporter to use a proxy server.

- If a proxy server is in use, check the 'Enable proxy' option. If it is not, leave the option un-checked

- If you wish to use the IE proxy values, select 'Yes'. If you wish to enter static server details, select 'No'

- Enter the Server, Domain, User name and Password for the proxy server
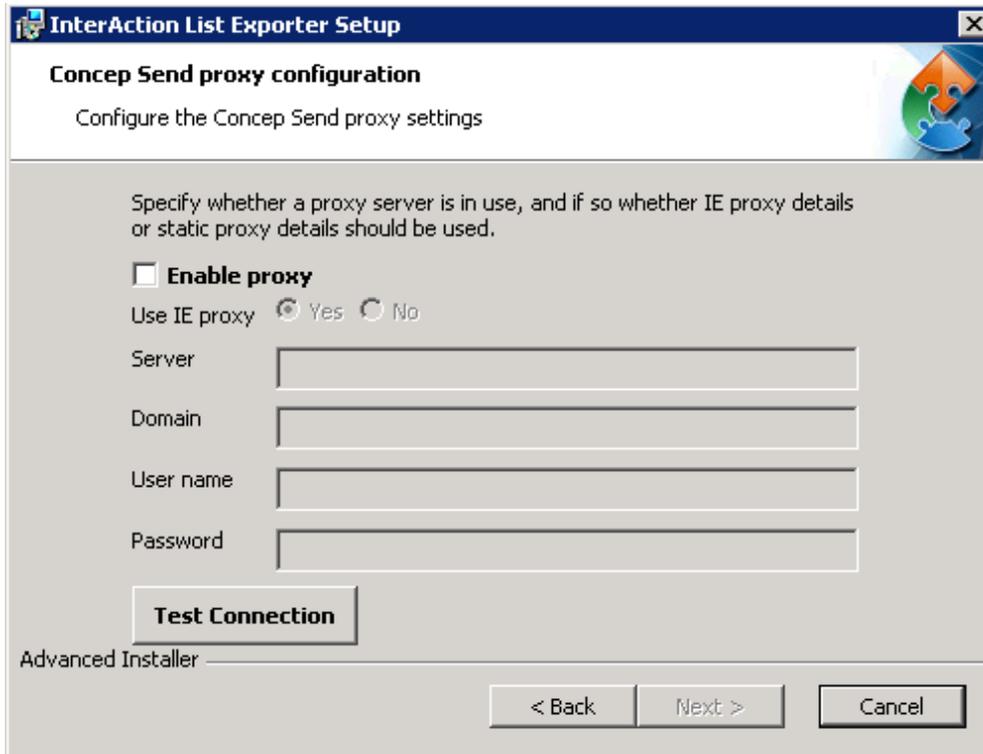


- When you have completed the proxy settings , click 'Test Connection'
    → If the credentials entered are incorrect, or a connection to the Concep Send API URL could not be made, 'Failed' will be displayed.

- If a connection to the Concep Send API can be established, a 'Success' message will be displayed, and the 'Next' button will become active
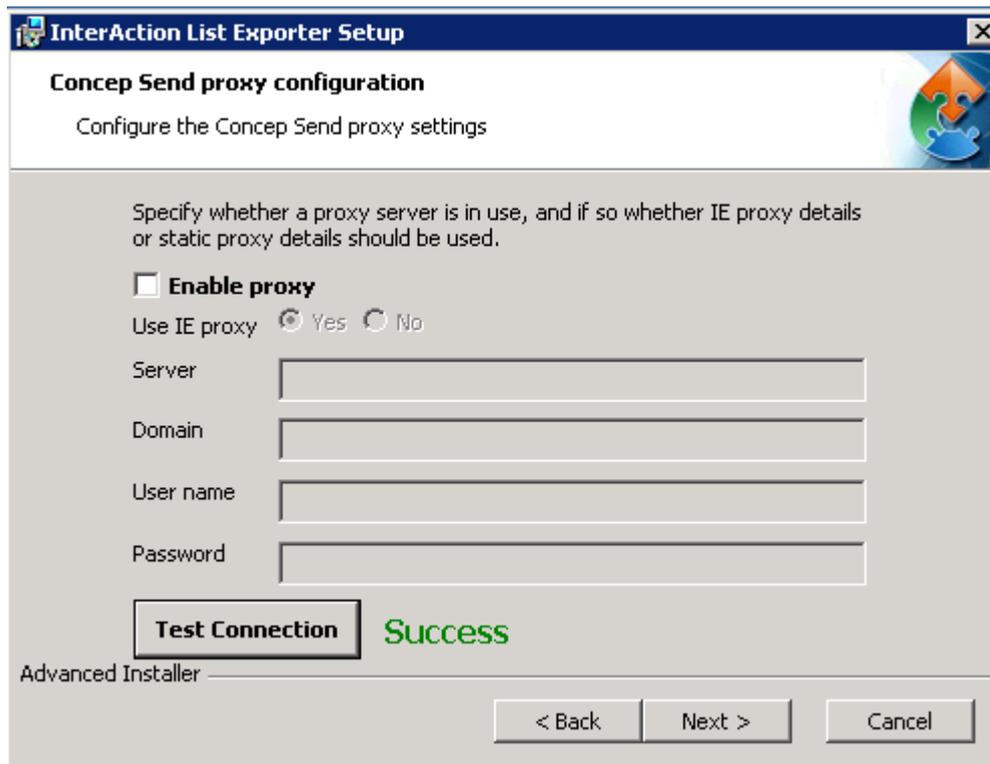
- If a connection cannot be established, a 'Failed' message will be displayed. Please check the details you have entered and try again
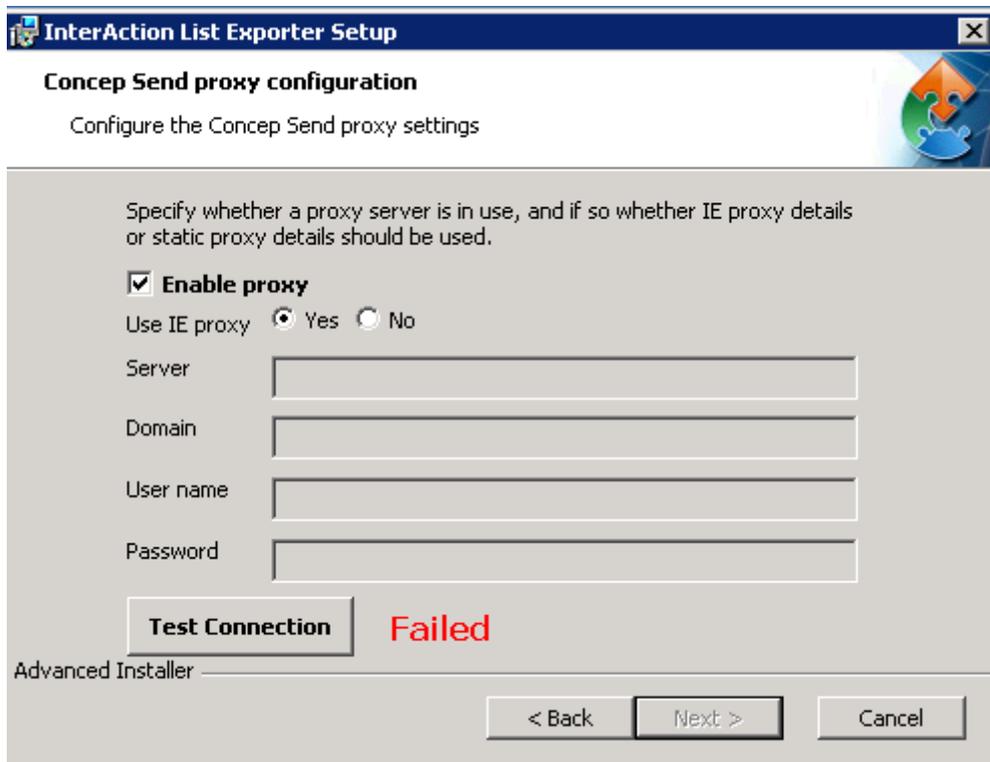


- Once the connection has been created successfully, click 'Next'

- Enter the URL of the InterAction App server – this is the URL used to access the Web Client and must include the port as per the example – and the InterAction username and password of the dedicated InterAction service account. Click on 'Test Connection'.
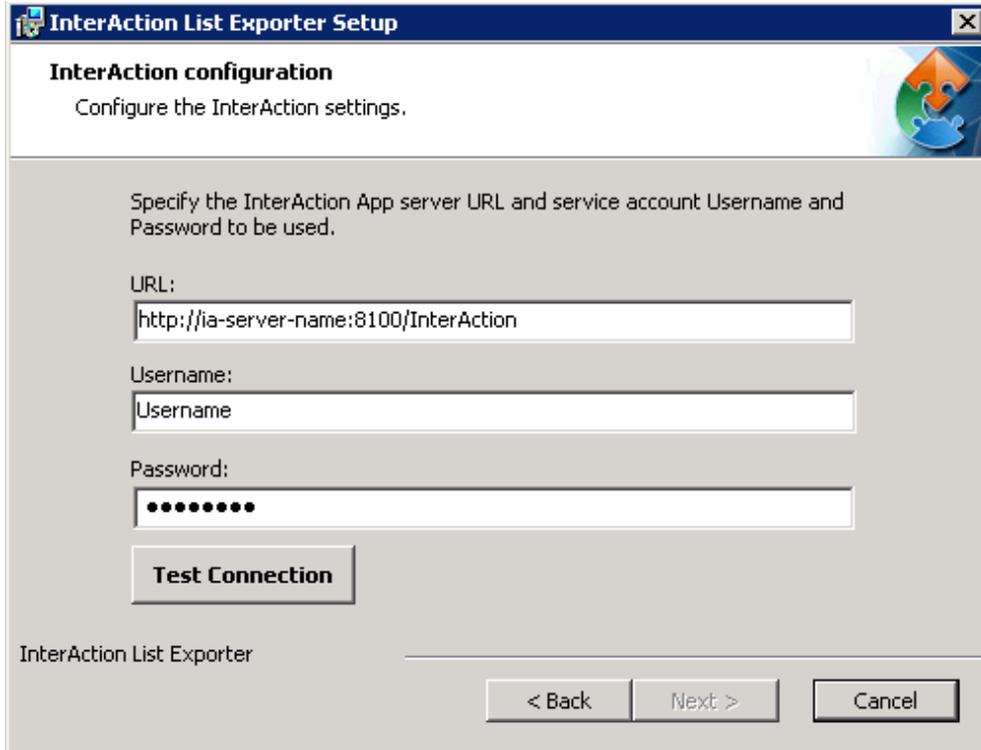


- If a connection to InterAction can be established, a 'Success' message will be displayed, and the 'Next' button will become active
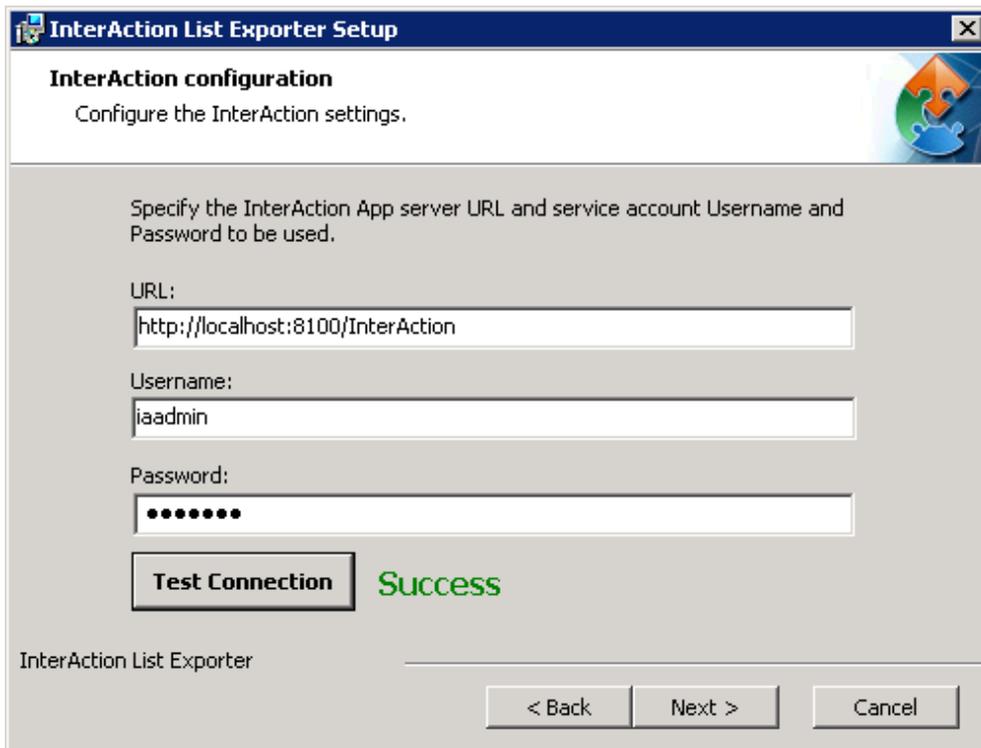
- If a connection cannot be established, a 'Failed' message will be displayed. Please check the details you have entered and try again
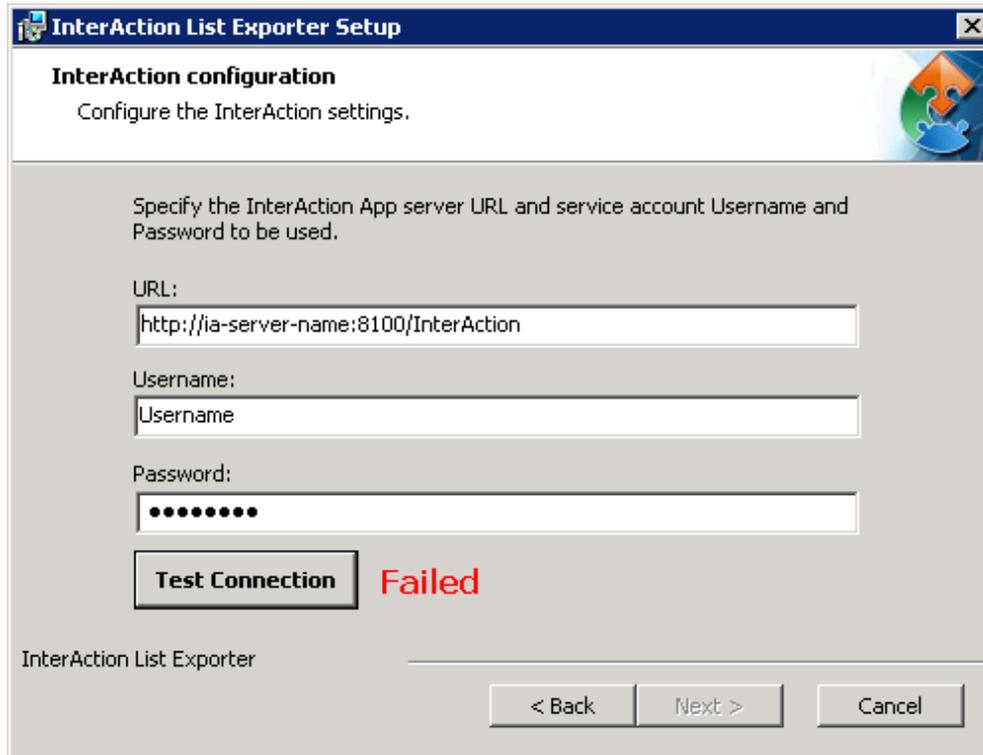


- Once the connection has been created successfully, click 'Next'

- You are now ready to install InterAction List Exporter
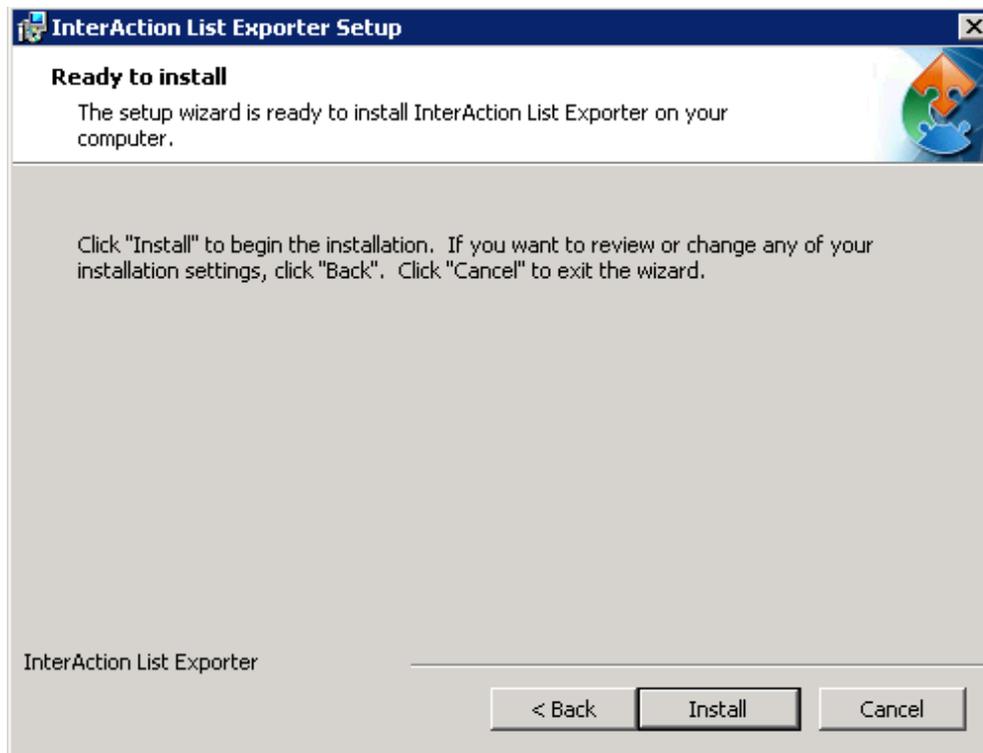
- If you wish to amend any details before the install, click 'Back'

- Click 'Install' to begin the installation process. Click 'Cancel' to cancel the installation

- InterAction List Exporter application will now be installed
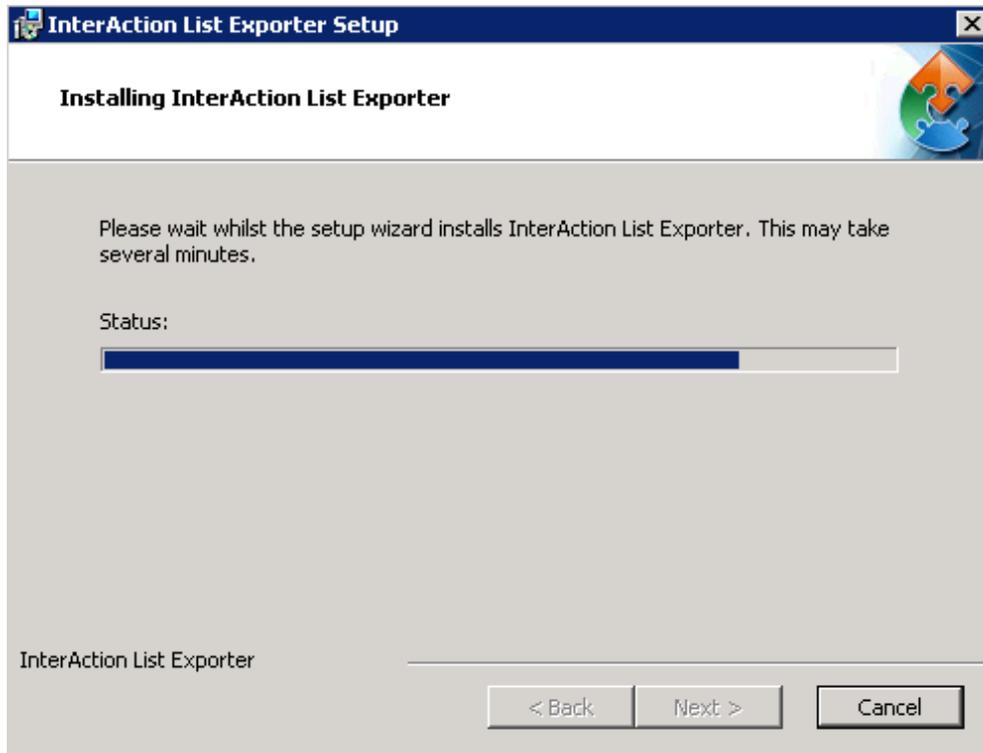


- InterAction List Exporter will now be installed in the specified location

- Once the application has been successfully installed, the final screen will confirm the setup has been completed
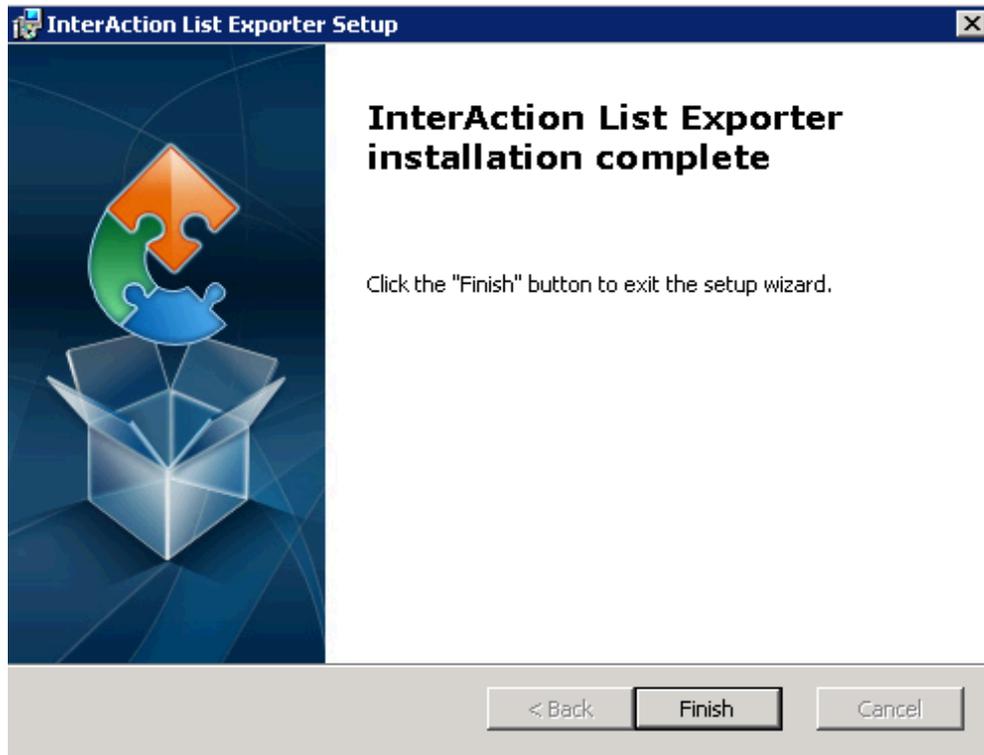
- Click 'Finish' to complete the installation.

## 1.4. Post-Configuration

After installation, the settings.xml file may need to be configured before List Exporter can be used. The settings.xml file is included within the zip package.

### 1.4.1. To amend the settings.xml file

1. Open Windows Explorer and navigate to the folder that List Exporter has been installed to
2. Open the settings.xml file in Notepad or Notepad++ (recommended)
3. Make any changes you wish to make
4. Save the changes
   - You can save the file as settings.xml to replace the original file in the same location, 'Save As' is not required
   - The file must be called settings.xml

### 1.4.2. Modifying the settings.xml file

The settings.xml file looks like this when opened in Notepad++. The following section indicates what each node does, and what can be configured after installation.

```
 1    <?xml version="1.0" encoding="utf-8" ?>
 2    <issconfig>
 3        <iausername>11TNwA/WCxrq8bkSAi0W4g==</iausername>
 4        <iapassword>rB6EWQCONN1AG+kwoSip+A==</iapassword>
 5        <iaurl>http://localhost:8100/InterAction</iaurl>
 6        <emsname>Concep Send</emsname>
 7        <emsusername>q7n4oR/PcJtqn9YU6rNJ/BnrjsDjH5pTUM5qp4ItBBc=</emsusername>
 8        <emspassword>/37IWHLZfsYmePNZsl8yKcnxVX8pJUUAgWHC7053Rss=</emspassword>
 9        <groupname>ENTER GROUP NAME HERE</groupname>
10        <emstype>CC2Client</emstype>
11        <emsurl>http://campaigner.concep.com/</emsurl>
12        <emsapiurl>https://api.campaigner.concep.com/service.asmx</emsapiurl>
13        <exportall>1</exportall>
14        <hasproxy>0</hasproxy>
15        <useieproxysettings>0</useieproxysettings>
16        <proxyusername></proxyusername>
17        <proxypassword></proxypassword>
18        <proxyserver></proxyserver>
19        <proxydomain></proxydomain>
20        <servicemenulabel>Share with Concep Send</servicemenulabel>
21        <createlog>1</createlog>
22        <logfilepath>C:\Program Files (x86)\Concep\InterAction List Exporter\Logs\</logfilepath>
23        <exportemailtype>Primary</exportemailtype>
24        <mappings>
25            <mapping ianame="commonname" ccname="goesby"></mapping>
26            <mapping ianame="middlename" ccname="middlename"></mapping>
27            <mapping ianame="website" ccname="website"></mapping>
28            <mapping ianame="suffix" ccname="suffix"></mapping>
29            <mapping ianame="sponsorfirstname" ccname="sponsorfirstname"></mapping>
30            <mapping ianame="sponsorlastname" ccname="sponsorlastname"></mapping>
31            <mapping ianame="sponsoremail" ccname="sponsoremail"></mapping>
32        </mappings>
33    </issconfig>
```

### InterAction Username: <iausername>

This is the encrypted InterAction username entered during installation. It is used to authenticate with the InterAction Web API in order to export contacts.

This must not be modified directly.

### InterAction Password: <iapassword>

This is the encrypted InterAction password entered during installation. It is used to authenticate with the InterAction Web API in order to export contacts.

This must not be modified directly.

### InterAction URL: <iaurl>

This is the InterAction Web Client URL entered during installation. It is used to authenticate with the InterAction Web API in order to export contacts.

This must not be modified directly.

### EMS Name: <emsname>

EMS stands for 'Email Marketing System'. The name of the application referenced in the List Exporter UI. The default name is 'Concep Send '.

Once the application has been installed, this name cannot be changed. An uninstall and re-install would be needed to change the name.

This is set during the installation process, and should not be modified here.

### *EMS Username: <emsusername>*

This is the encrypted username of the Send account that was most recently exported to.

It can be modified, but is usually set through the List Exporter UI.

### *EMS Password: <emspassword>*

This is the encrypted password of the Send account that was most recently exported to.

It can be modified, but is usually set through the List Exporter UI.

### *Group Name*

This is the most recently used group name for an export.

It can be modified, but is usually set through the List Exporter UI.

### *EMS Type: <emstype>*

This is the version of Concep Send. All client's use CC2Client now.

This must not be modified.

### *EMS URL: <emsurl>*

This is the login domain for Concep Send. It is possible that your organization has a custom login domain, and will usually have been set during installation. The default domain is http://campaigner.concep.com.

This must not be modified.

### *EMS API URL: <emsapiurl>*

This is the API URL for Concep Send. The default domain is https://api.campaigner.concep.com/service.asmx.

This must not be modified.

### *Has Proxy: <hasproxy>*

This setting defines whether the application will need to communicate through a firewall or not:

1 = Yes

0 = No

It should have been set during installation.

This can be modified if required.

### *Use IE Proxy Settings: <useieproxysettings>*
This setting determines whether your organization uses IE proxy settings or not:

1 = Yes
0 = No

It should have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Proxy Username: <proxyusername>*
The username for the proxy firewall. This will allow the application access through the firewall.

If the <hasproxy> node is set to 1, and the <useieproxysettings> node is set to 0, then the <proxyusername> node must be configured. It should have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Proxy Password: <proxypassword>*
The password for the proxy firewall. This will allow the application access through the firewall.

If the <hasproxy> node is set to 1, and the <useieproxysettings> node is set to 0, then the <proxypassword> node must be configured. It should have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Proxy Server: <proxyserver>*
The location of the server to submit the username and password to, and for the application to gain access to the internet.

If the <hasproxy> node is set to 1, and the <useieproxysettings> node is set to 0, then the <proxyserver> node must be configured. It should have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Proxy Domain: <proxydomain>*

The domain of the server to submit the username and password to, and for the application to gain access to the internet.

If the <hasproxy> node is set to 1, and the <useieproxysettings> node is set to 0, then the <proxydomain> node must be configured. It should have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Service Menu Label: <servicemenulabel>*

The name of the application shortcut to be created in the services menu of InterAction upon installation. The default name is 'Export to Concep Send '.

Once the application has been installed, this name cannot be changed. An uninstall and re-install would be needed to change the name.

This is set during the installation process.

### *Create Log: <createlog>*

This setting determines whether log files are created or not:

1 = Yes
0 = No

It can be modified, but is usually set through the List Exporter UI.

### *Location of Log Files: <logfilepath>*

This is the location of the log files if the <createlog> node is set to 1.

It will have been set during installation.

It can be modified, but is usually set through the List Exporter UI.

### *Email Type to be Exported: <exportemailtype>*

The type of email address to export to Concep Send:

Primary = Primary email address
Business = Business email address

The default is 'Primary' email address.

If you would like to explicitly export the 'Business' email address of a contact, then enter Business. If you wish to use the InterAction hierarchy of 'Primary' email address, then enter Primary.

### *Mappings: <mapping>*

Mappings for additional InterAction contact fields to fields within Concep Send.

The fixed, mandatory mappings are:

- **InterAction Field** > **Concep Send Field**
- Dual Contact ID > External ID
- Title > Title
- Firstname > First Name
- Lastname > Last Name
- Email > Email
- Jobtitle > Job Title
- Company > Company
- Street > Address Line 1
- Street2 > Address Line 2
- City > City
- State > State
- Postcode > Zip/Postal Code
- Country > Country
- Direct Phone > Phone
- Fax > Fax
- Mobile > Mobile
- Department > Department
- Email Format > Email Format

These are not listed in the settings.xml file.

The following InterAction fields can also be mapped:

- **InterAction Field** > **Concep Send Field**
- Common Names (Goes by) > Goes by
- Middle Name > middle name
- Suffix > Suffix
- Company Website > Website
- Primary Sponsor First Name > Sponsor First Name
- Primary Sponsor Last Name > Sponsor Last Name
- Primary Sponsor Primary Email Address > Sponsor Email

They are mapped by default in the settings.xml file.

If you do not wish to export any of these fields, either comment out the appropriate line, or remove it from the settings.xml file.

If you wish to map any other fields, please contact your Account Manager, helpdesk@concep.com or implementation@concep.com.

### 1.4.3. Modifying the InterAction, Logging and Proxy entries

If you need to modify any of the above items, this can be done by launching the List Exporter, and clicking on 'Settings'. This will open up the following screen, allowing you to modify the saved information.
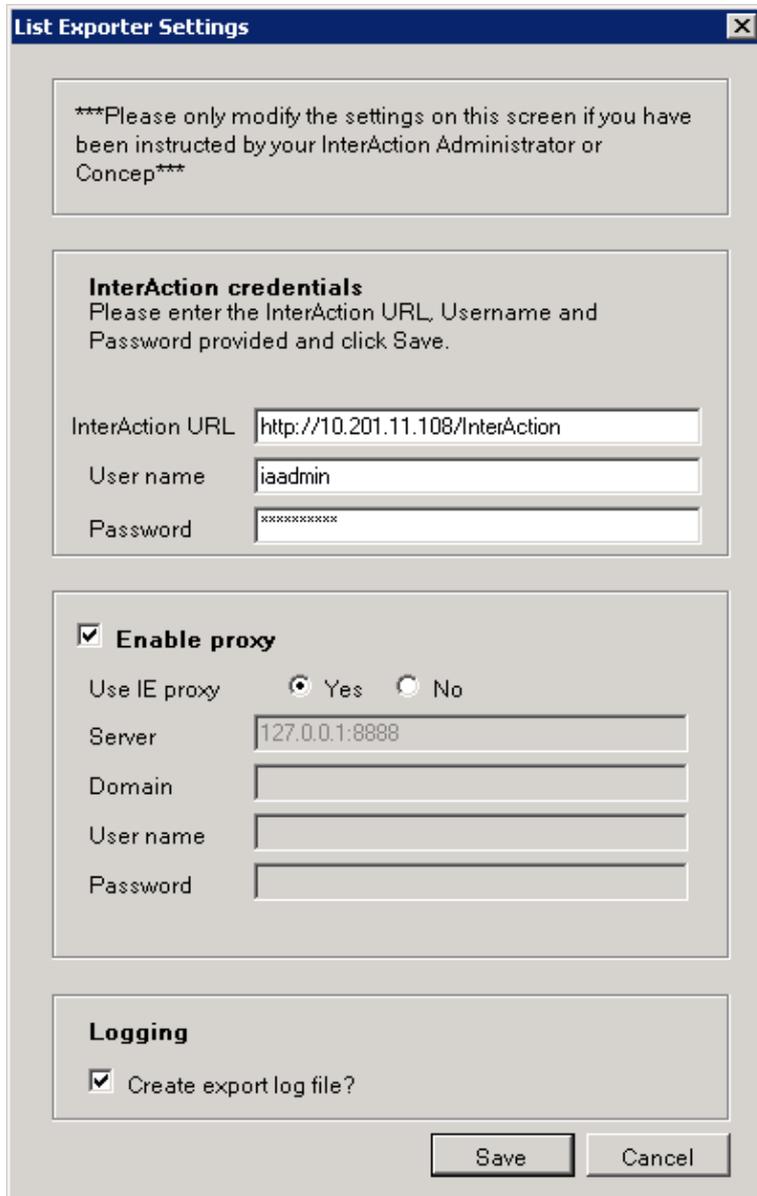


When new details are entered and 'Save' is clicked, they are checked to ensure it is still possible to connect to InterAction and Concep Send's API. If it is not, an error / warning message will be displayed. Please ensure that valid details have been saved before exiting the settings area and attempting another export.

### 1.5.      InterAction – Global Additional Field – Email Format

If you wish to store a contact's preferred 'email format' (i.e. HTML or Plain Text) in InterAction, and export this to Concep Send, you will need to create a Global Additional Field as follows:

- Name:            Email Format
- Status:          Active
- Field Type:      Yes/No
- True Value:      HTML
- False Value:     Plain
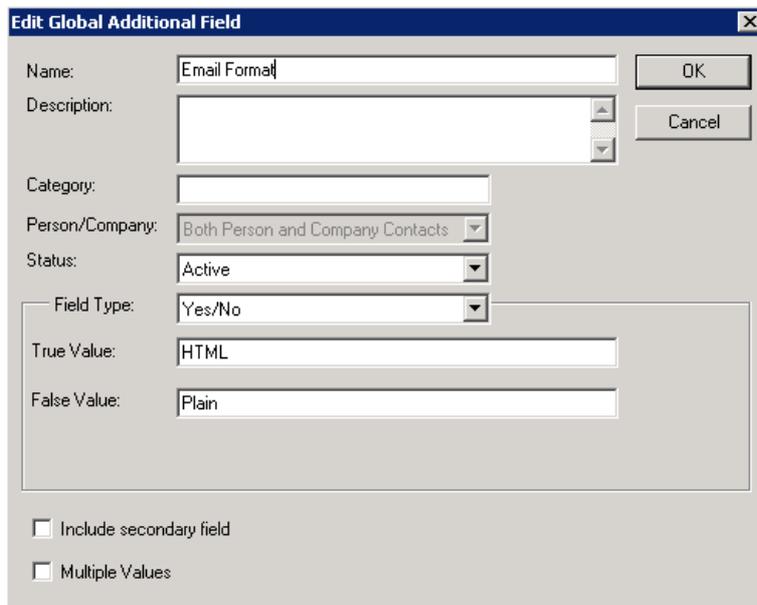


The value of this field will be imported to the 'Email Format' Concep Send field.

Note, if this Global Additional Field is either empty, or does not exist, by default the contact will be imported with Email Format set to HTML.

### 1.6.      Concep Send – Custom Address Book Fields

In order to export all of the information list in the 'mappings' section above, it is necessary to create some Custom Fields in the Concep Send Address Book. This can be completed by your Marketing team, with assistance from the Concep Helpdesk, Implementation or Account Management teams.

Note that if you do not want to export the information above, the Custom Fields do not need to be created. If a Custom field is not present, that mapping will simply be ignored and the export will continue as normal.

The following fields may need to be created:

- Goes by
- Middle name

- Suffix
- Department
- Website
- Sponsor First Name
- Sponsor Last Name
- Sponsor Email

For ease, they should all be created as free text fields.

## 1.7. The IntrActn.ini File

In order to add the shortcut to the InterAction Windows Client Service menu, two entries are made to the IntrActn.ini file during installation. These entries are shown below.

It is not necessary for you to change these entries or create them manually.

However, if the shortcut is not visible after installation, it may be necessary to check the IntrActn.ini file for the below entries.

```
 9    [Services]
10      Service:Generate Activity=
11      Service:Duplicate Contact Finder for 2 Folders=
12      Service:Duplicate Contact Finder=
13      Service:Potential Duplicates Report=
14      Service:Administrative Reports=
15      Service:Automated Export=
16      Service:Broadcast E-mail=
17      Service:Export Tool=
18    [Service:Automated Export]
19      Path=C:\Program Files\Interface Software\InterAction 5\Client\iaexport5.exe
20      MenuText=Automated Export
```

```
103     EmailPlatform=GROUPWISE
104    [Service:Export Tool]
105      Path=CmapExportTool.exe
106      MenuText=Export Tool
107      Directory=C:\Program Files\Concep\cMap for InterAction - List Export Tool
108
```

## 1.8. How to Use InterAction List Exporter

Please refer to the document 'InterAction List Exporter v2.6.x - User Guide.pdf' for details on how to use List Exporter.

## 1.9. Support

If you have difficulties in installing or configuring List Exporter please contact implementation@concep.com.