

WEBCONNECTOR FOR DAYLITE

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General

WebConnector for Daylite

About WebConnector

WebConnector adds a context-sensitive Web browser to contacts, organizations, projects, opportunities and groups in Daylite

WebConnector is the perfect tool to gather additional information on contacts and companies from the web (Facebook, Twitter, LinkedIn, XING etc.). Pages found during a WebConnector search can be added to the contact company, project and opportunity details for convenient access later on. You're also able to assign LinkedIn and XING profiles to your contacts and import data from there to keep addresses and phone numbers up-to-date.

Features

WebConnector provides the following features:

- Research on contacts and companies right out of Daylite
- Keep track of your contact's webpages, blogs and social media profiles
- Integrating web based project management or collaboration services with a specific project, opportunity or group in Daylite
- Add or customise search engines and web services available in WebConnector
- Batch import of LinkedIn contacts
- Assign XING profiles to your contacts and import profile data

System Requirements

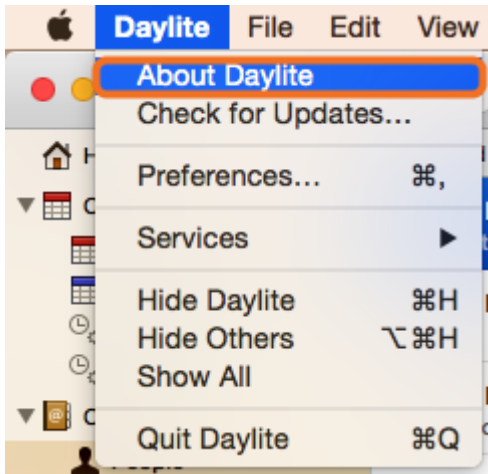
Operating System: OS X 10.7 or newer

Daylite Version: 4.0.5 or newer

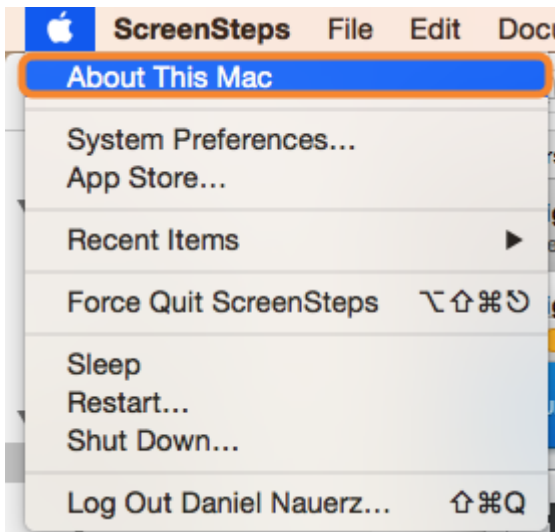
Setup

Installation

1. To check your Daylite version, go to the Daylite menu and select 'About Daylite'. WebConnector requires at least Daylite 4.0.5.



2. To check your OS X version, go to the Apple menu and select 'About this Mac'. WebConnector requires at least OS X 10.7.



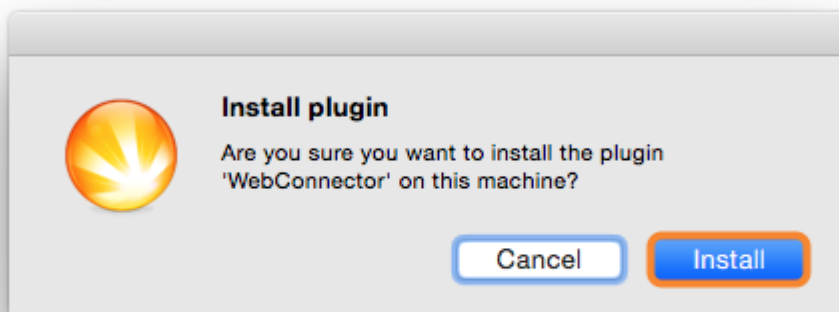
3. Open 'WebConnector_for_Daylite.dmg'.



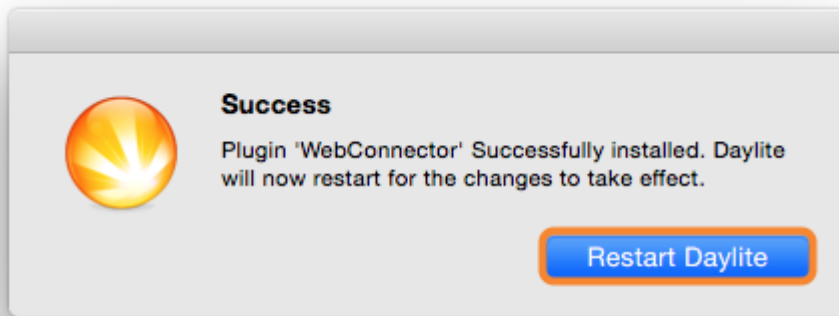
4. Double-click 'WebConnector.daylite-plugin'.



5. Click install



6. To finalize the installation click 'Restart Daylite'

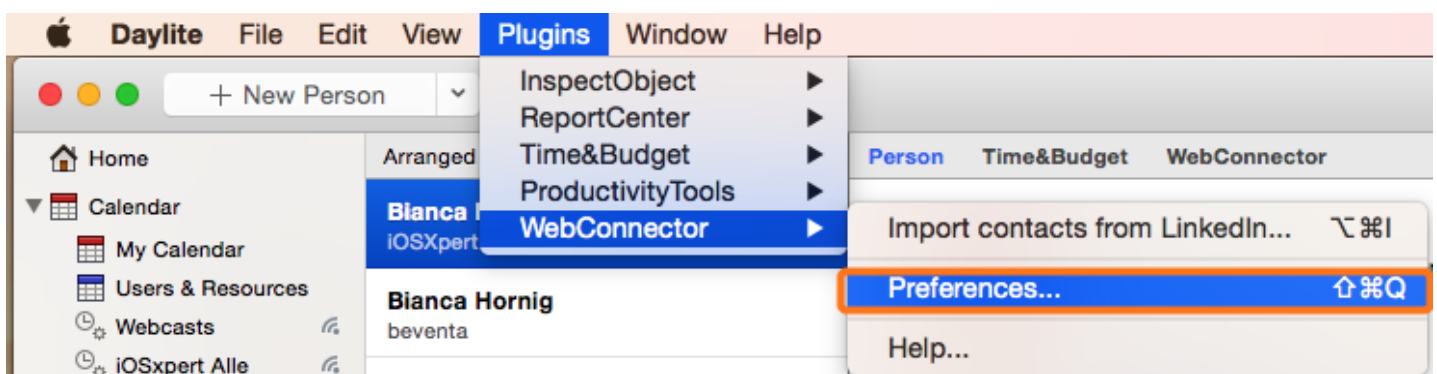


7. After the installation WebConnector can be used for 14 days free of charge. If you would like to use it after these 14 days, please proceed to chapter '[Licensing](#)'.

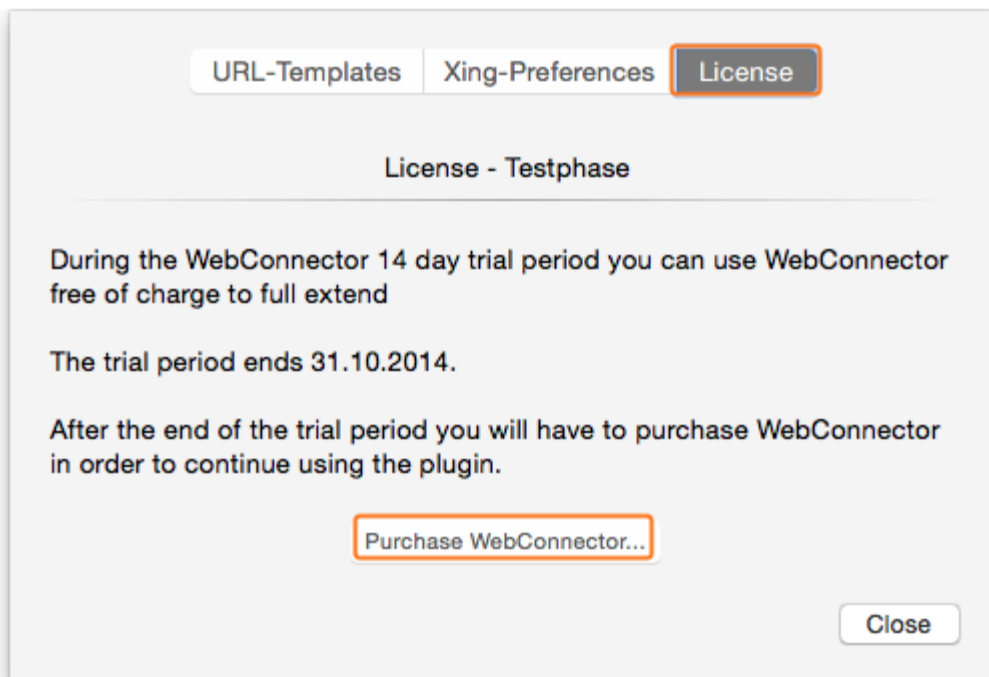
Licensing

Without entering a license code you can test [WebConnector](#) during a 14 day trial period. After this period you will need a license code in order to use the plugin. In order to purchase Time&Budget, please follow these steps (given the plugin is already installed):

1. Start Daylite
2. In the Daylite menu select Plugins --> WebConnector --> Preferences...



3. Select the License tab and click Purchase WebConnector...



4. Select whether you would like to subscribe to WebConnector as a monthly service or to purchase it at a single payment.

The screenshot shows a dialog box titled 'License' with three tabs: 'URL-Templates', 'XING-Preferences', and 'License'. The 'License' tab is active. Below the title bar, the text 'Purchase WebConnector' is followed by two radio button options. The first option, 'at a monthly all-inclusive rate', is unselected. The second option, 'at a single payment', is selected. Below each option is a description of the service and a price tier table. At the bottom, there are 'Back', 'Next', and 'Close' buttons.

URL-Templates XING-Preferences License

License

Purchase WebConnector

at a monthly all-inclusive rate
Subscribe to WebConnector at \$4.90 per Daylite user per month you'll get WebConnector including all future updates and additional reports. The WebConnector service may be cancelled on monthly basis.

Price tier (price per license):
5 or more \$4,70
10 or more \$4,40
20 or more \$3,90
30 or more \$3,40

at a single payment
Purchase WebConnector at a single payment of \$59 per Daylite user. Updates required due to major Mac OS X or Daylite updates as well as future additional reports are not included, but may be purchased separately.

Price tier (price per license):
5 or more \$56,00
10 or more \$53,00
20 or more \$47,00
30 or more \$41,00

[Learn more about the difference between the single payment and the Subscription at a monthly all-inclusive fee...](#)

Back Next Close

WebConnector Subscription

If you would like to subscribe to the WebConnector , please do the following:

Accept the license agreement, click Next and follow the steps on the screen

The screenshot shows a dialog box titled 'License' with three tabs: 'URL-Templates', 'Xing-Preferences', and 'License'. The 'License' tab is active. Below the title bar, the text 'I have 22 active users in my database' is followed by 'I want 22 licenses for WebConnector'. Below this is a note: 'The subscription may be updated any time and will be in effect immediately'. A checked checkbox is followed by the text 'With the subscription of WebConnector you accept our license agreement'. At the bottom, there are 'Back', 'Next', and 'Close' buttons.

URL-Templates Xing-Preferences License

License

I have 22 active users in my database

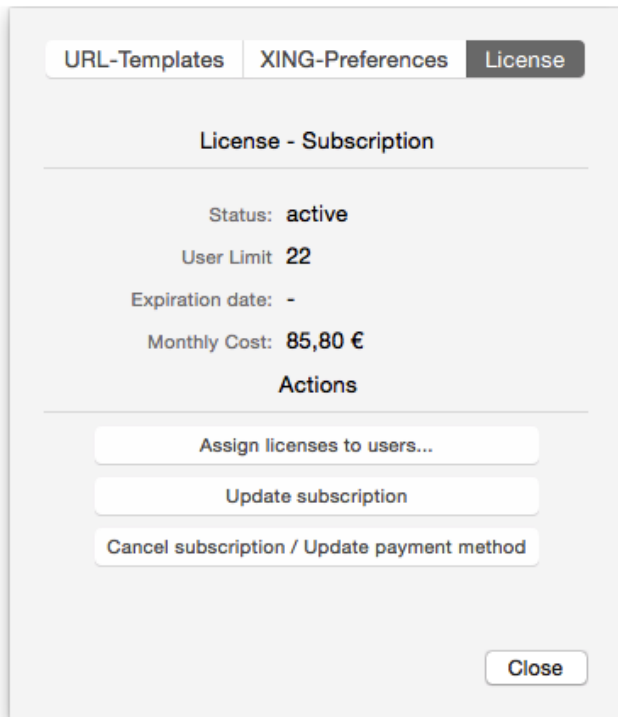
I want 22 licenses for WebConnector

The subscription may be updated any time and will be in effect immediately

With the subscription of WebConnector you accept our license agreement

Back Next Close

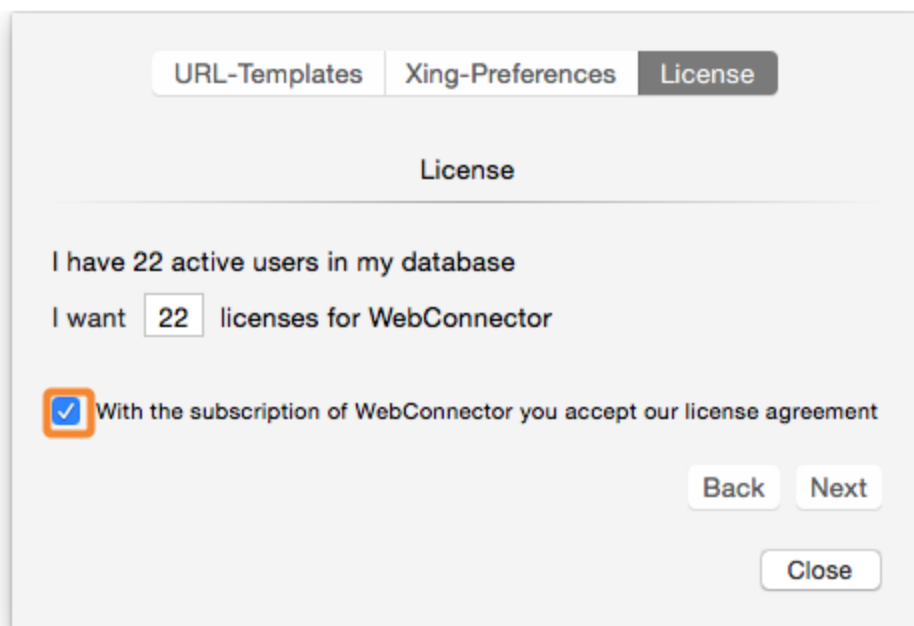
After completing all steps you'll see this window



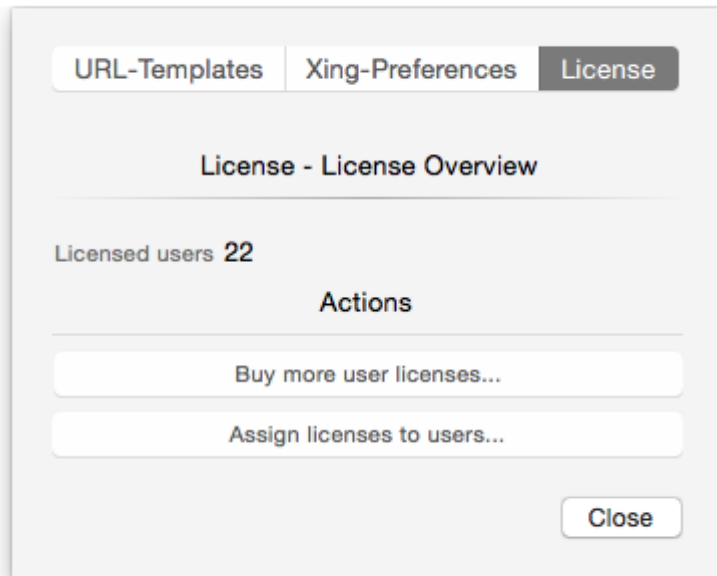
Purchase WebConnector

If you would like to purchase WebConnector, please do the following:

Accept the license agreement, click Next and follow the steps on the screen



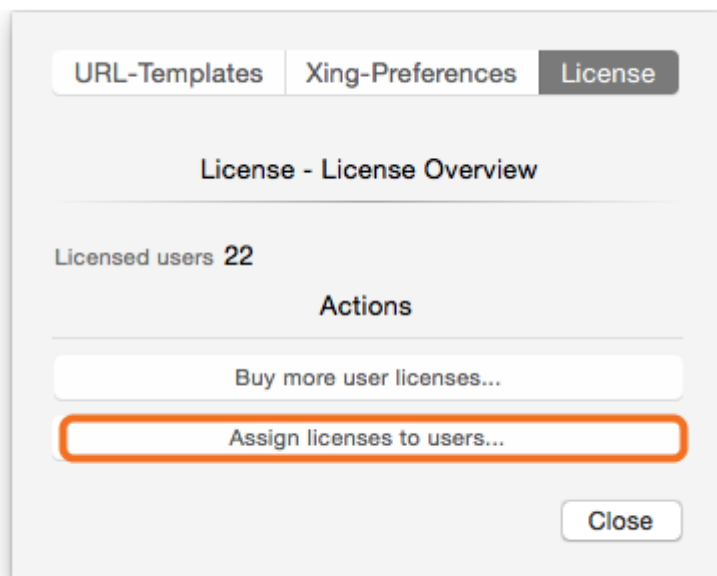
After completing all steps you'll see this window



Assign WebConnector licenses to Daylite users

To allow a particular Daylite user to use WebConnector you need to assign a license to that user.

In order to do so click Assign license to user



The following window shows all Daylite users. To assign a license just check the box accordingly. This finalizes the licensing process.

URL-Templates

Xing-Preferences

License

License - Assign Users

Name	Aktiv
Bianca Hornig	<input checked="" type="checkbox"/>
Cemile Pehlivan	<input type="checkbox"/>
Christian Zell	<input type="checkbox"/>
Christian Ebelshäuser	<input type="checkbox"/>
Daniel Fernández Álvarez	<input type="checkbox"/>
Daniel Nauerz	<input checked="" type="checkbox"/>

Verbleibende Lizenzen: 2

Back

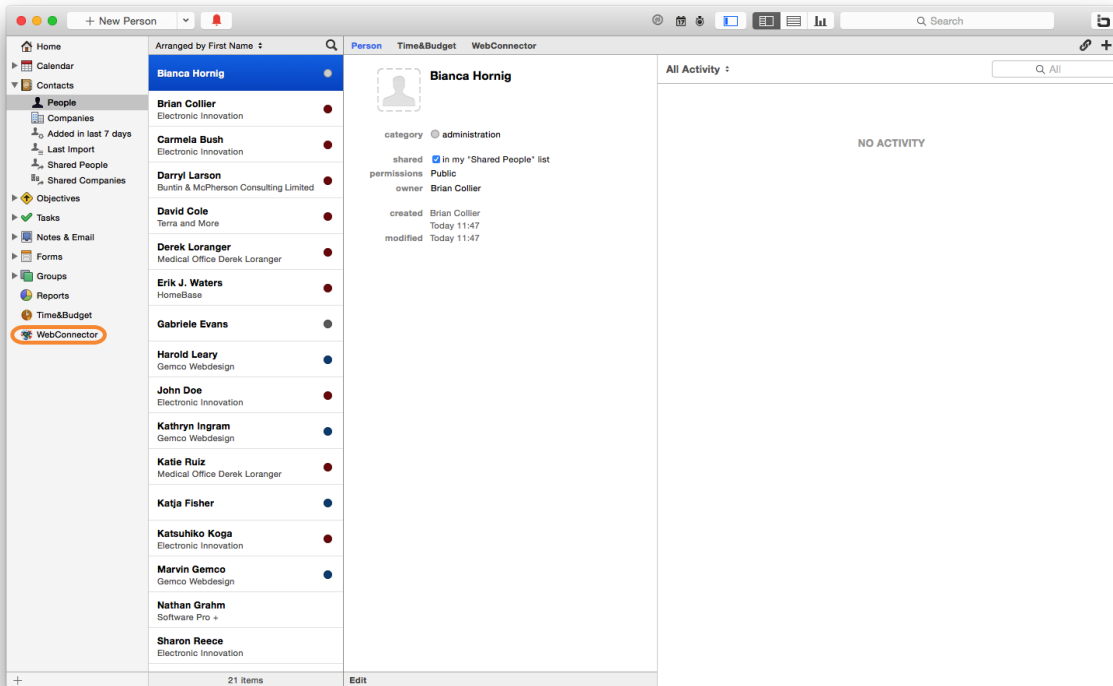
Close

Usage

Global Search

1. Start Daylite

2. Click WebConnector. Please note that this button will only appear in Daylite 5. In Daylite 4 the global search is available through the plugins menu -> WebConnector -> Global Search



Navigation

- (1) Previous page
- (2) Next page
- (3) Back to global Search
- (4) Address bar
- (5) Reload page
- (6) Cog wheel



Cog Wheel Menu

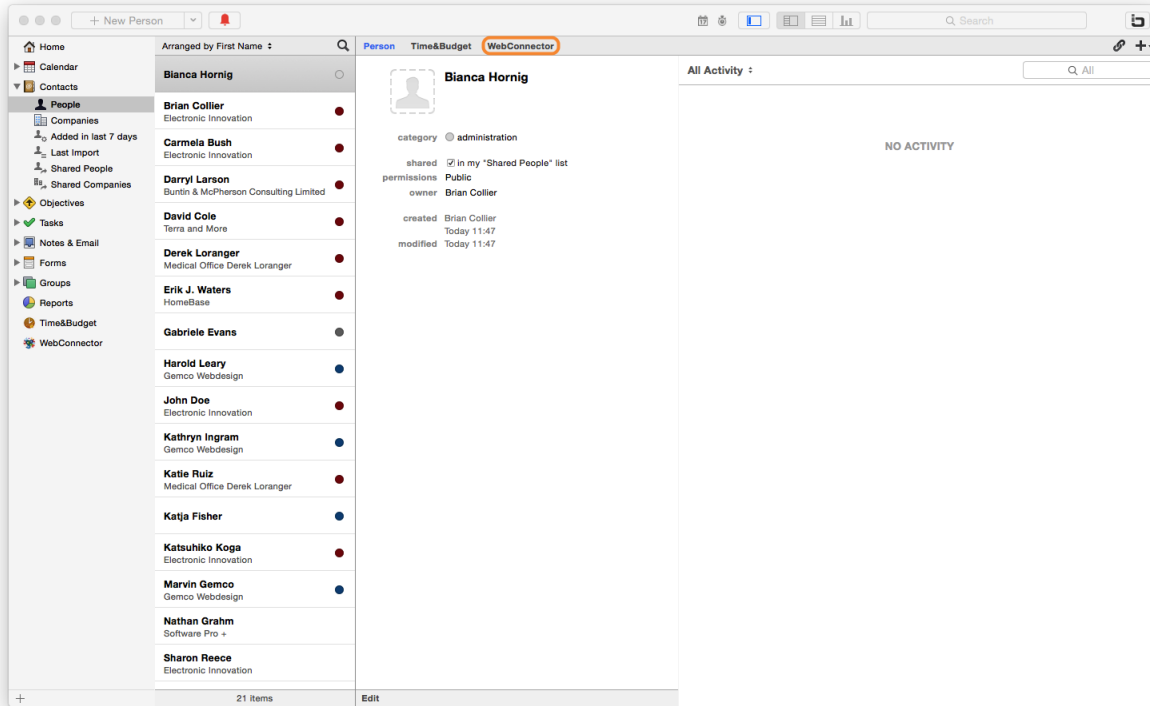
- (1) Show result in web browser

- (2) Copy URL to clipboard
- (3) Print web page
- (4) WebConnector preferences



Use Search Engines and References

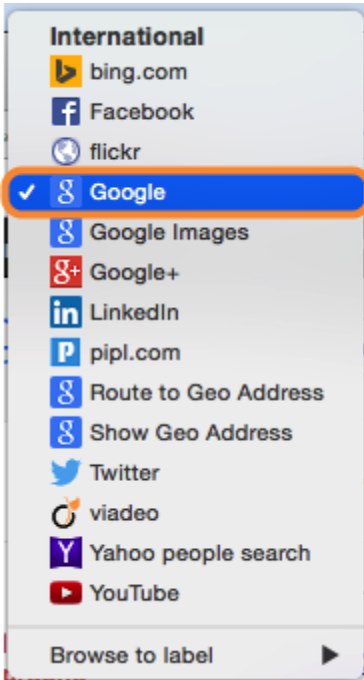
1. Start Daylite
2. Select a person, company, opportunity, project or group
3. Click WebConnector



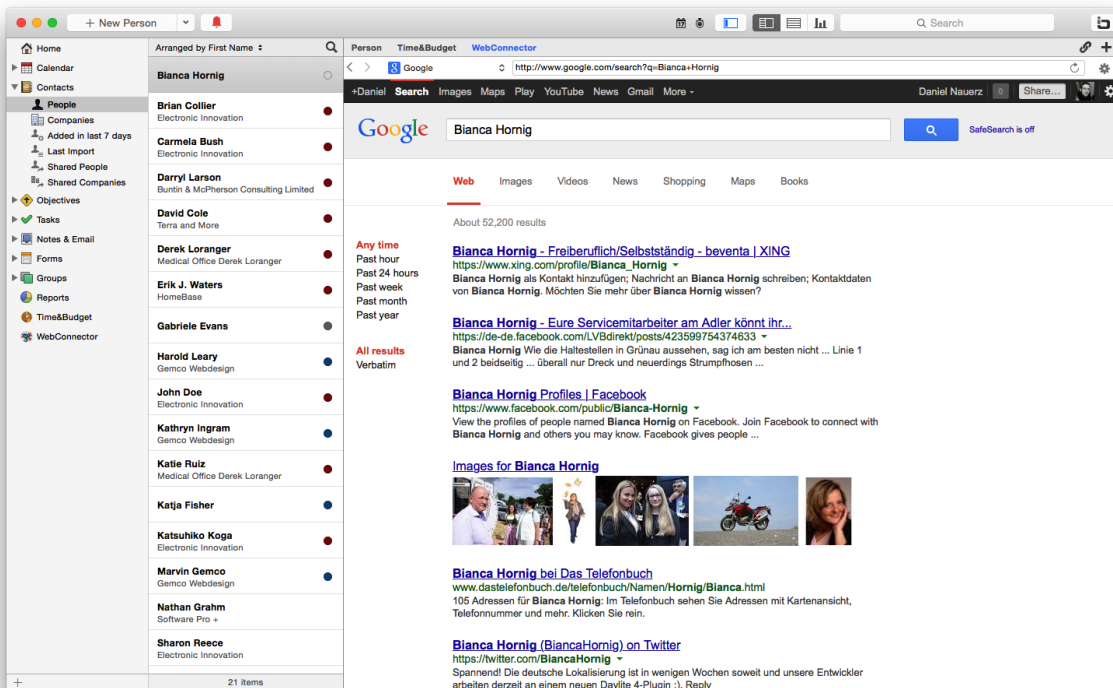
4. Use the drop down menu to select the search engine or reference



5. Select the desired search engine or reference/label



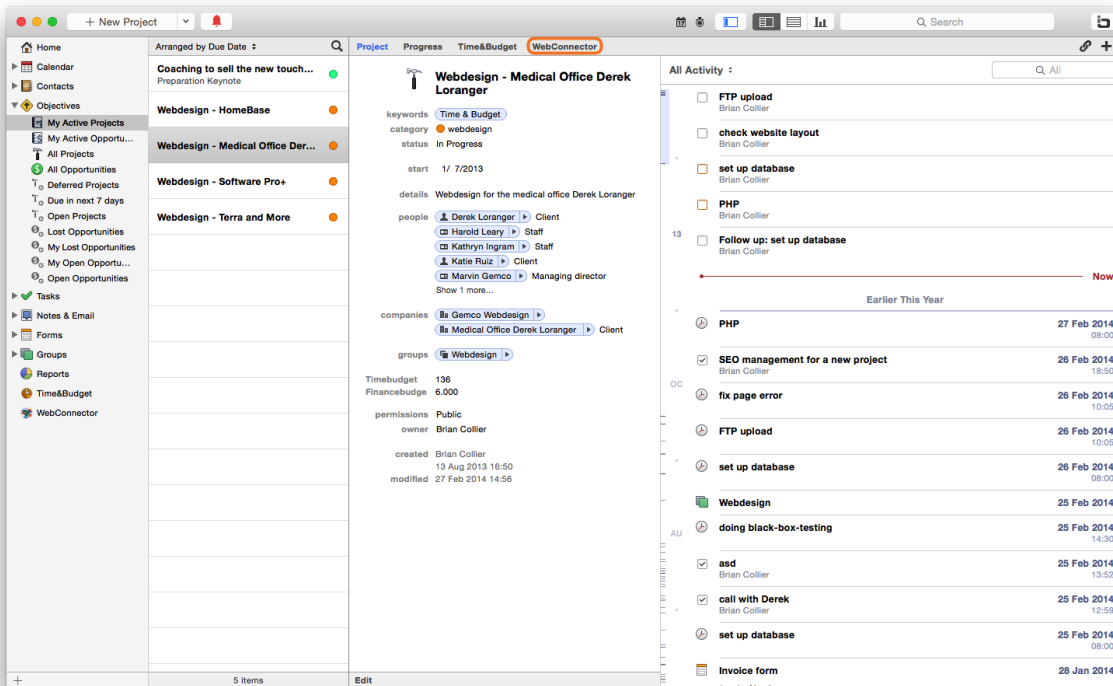
6. WebConnector displays the search result



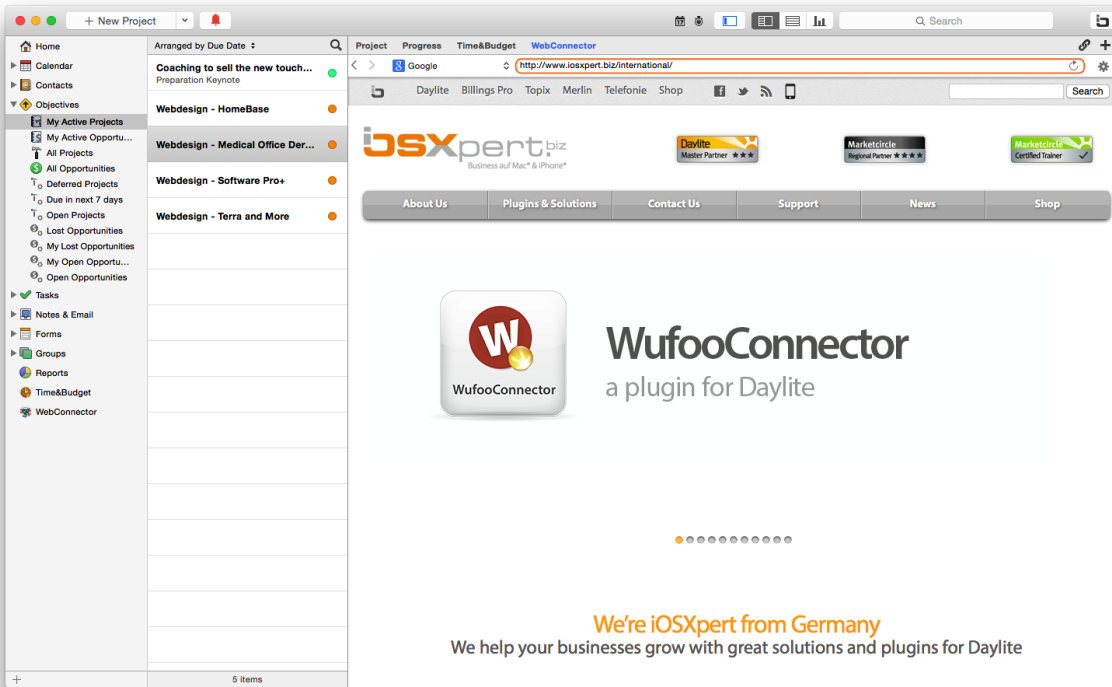
Store and Open Web Pages

Store URL

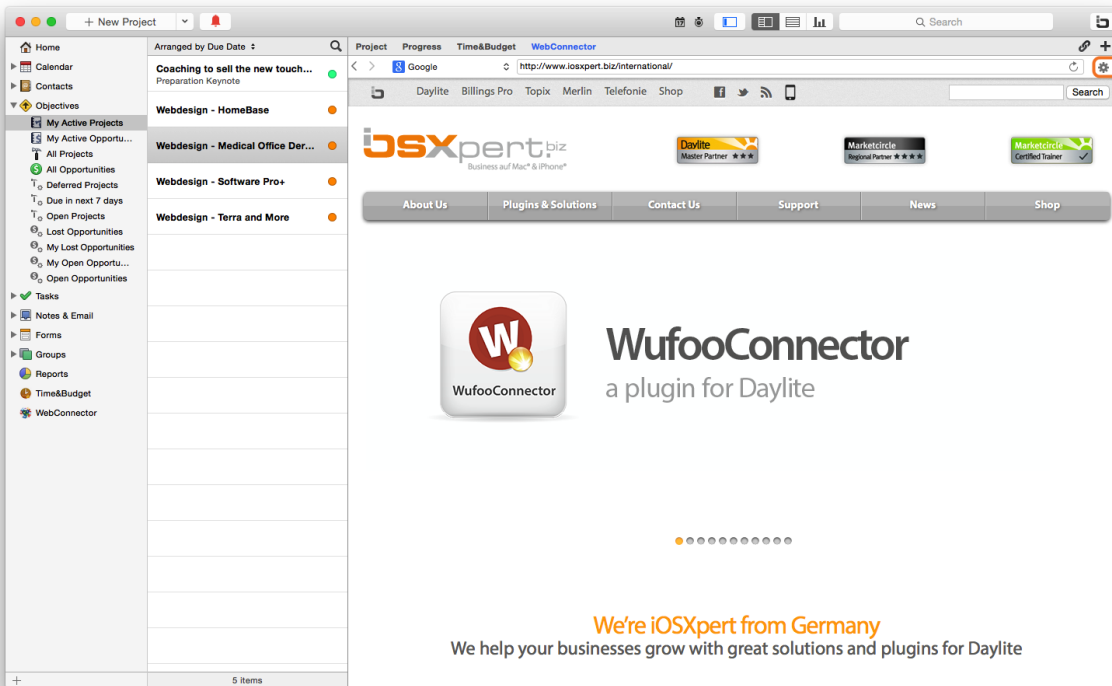
1. Start Daylite
2. Select the desired Daylite object (person, company, project or opportunity)
3. Click WebConnector



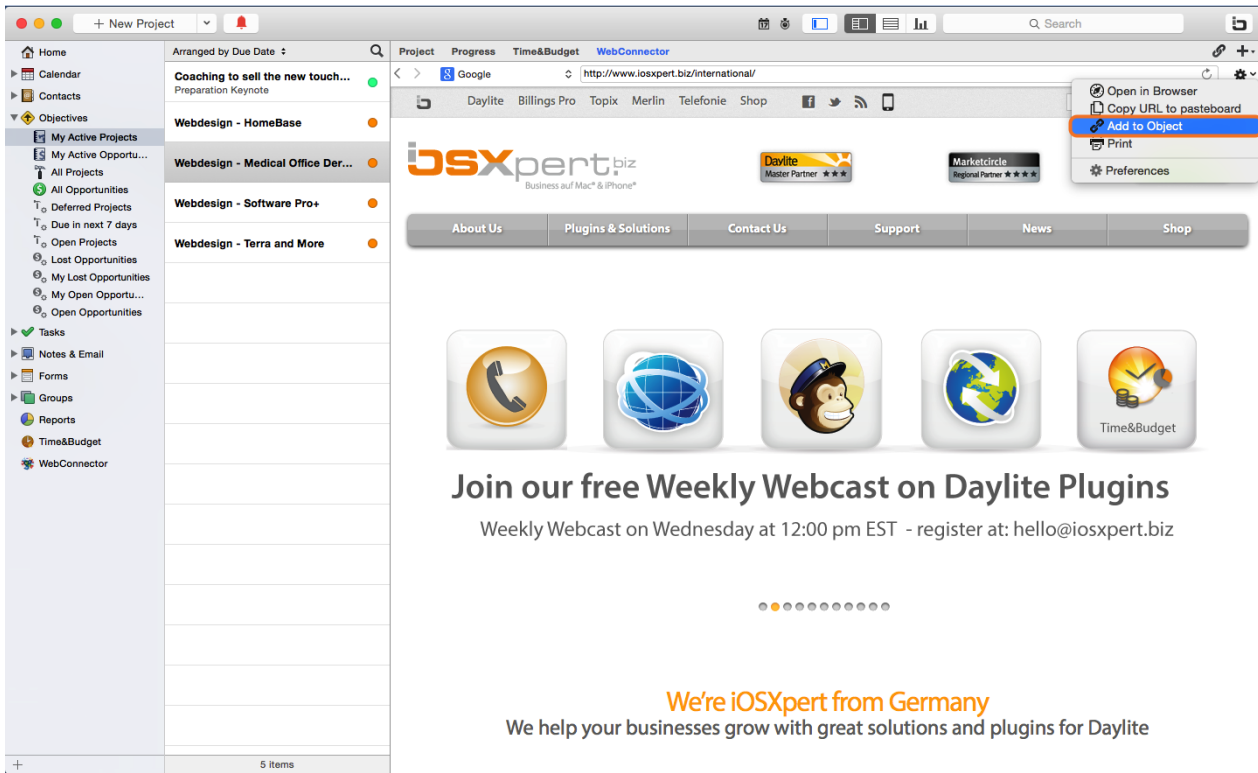
4. Enter an URL or perform a search



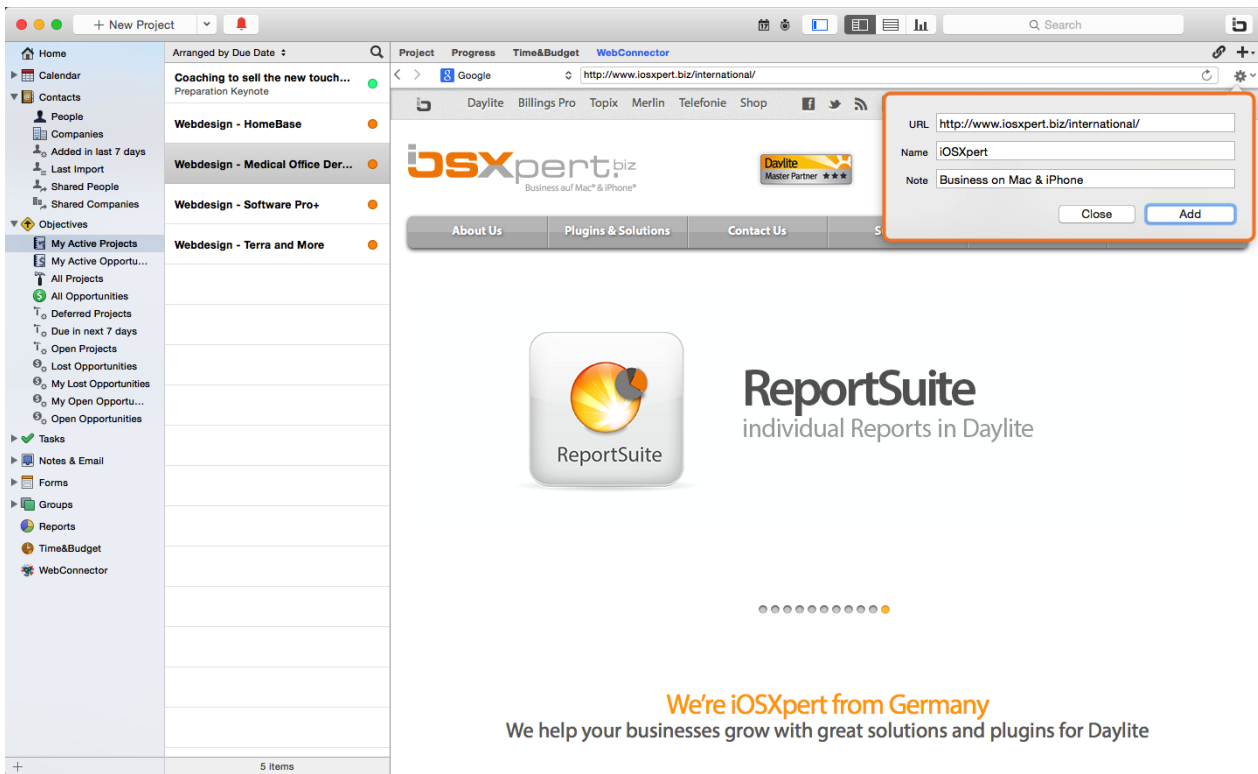
5. Click the cog wheel



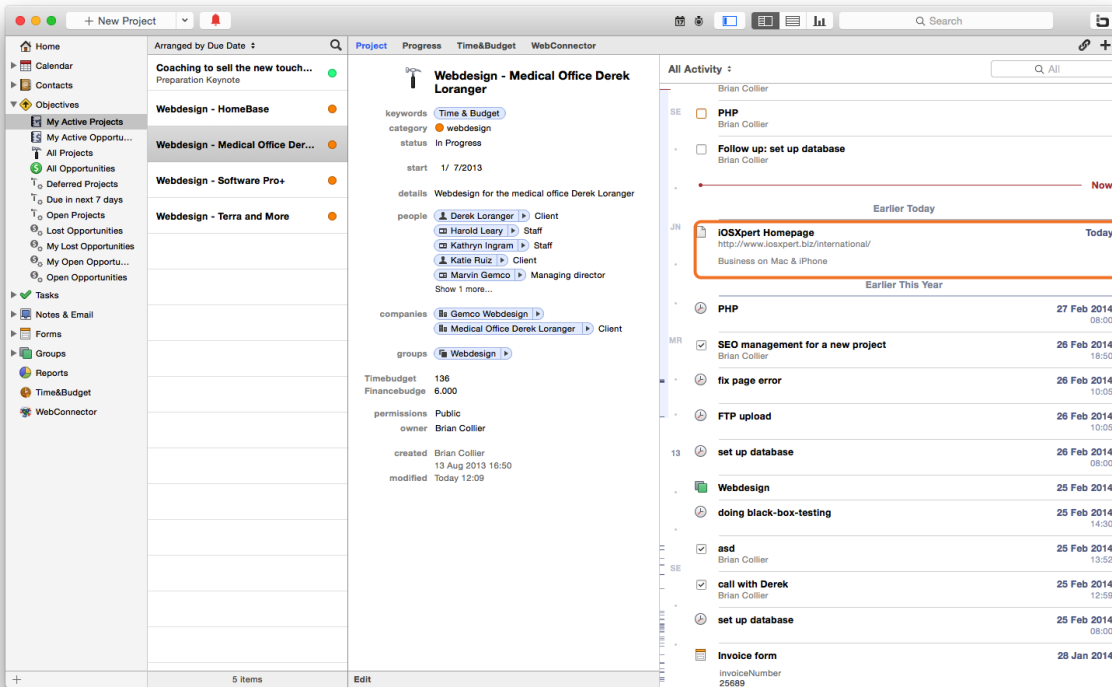
6. Select "Add to Object"



7. Enter the desired information and click 'Add'

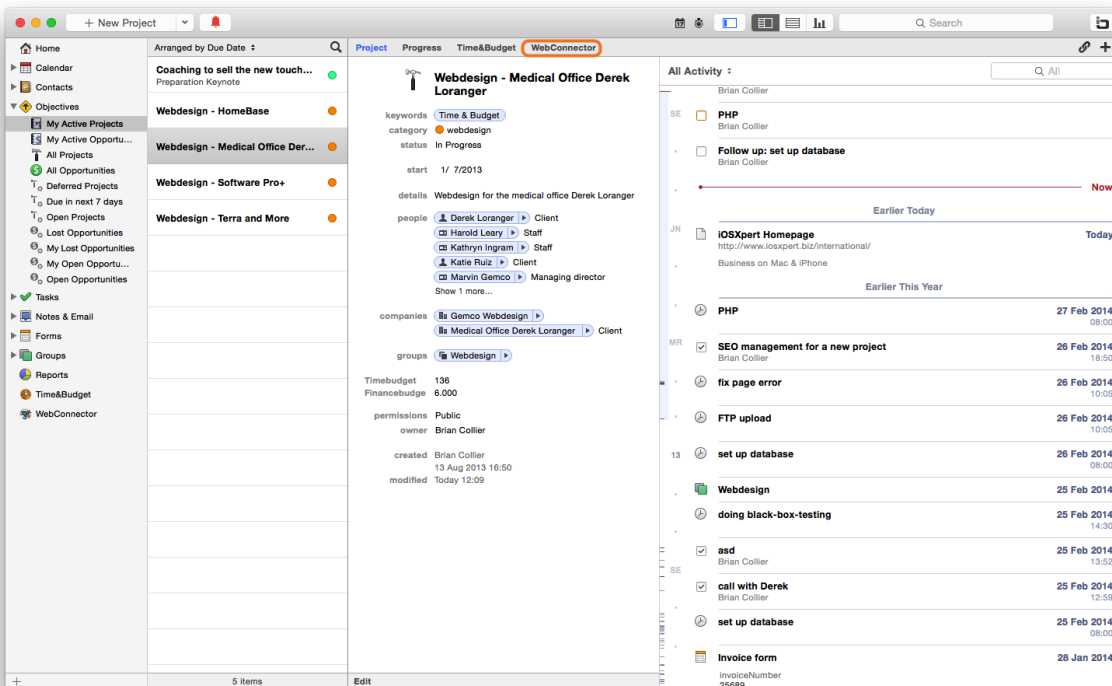


8. In case of a project or opportunity the added web reference will show in the object's history. Web references for persons and companies will show in the object's details.

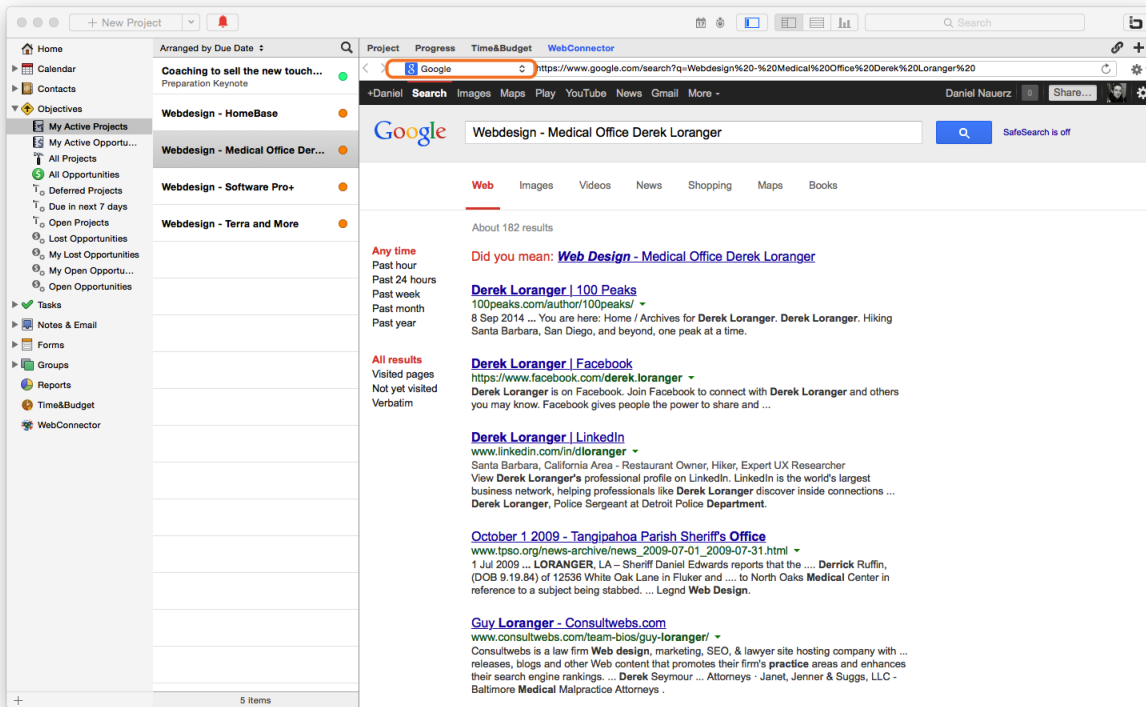


Using stored references

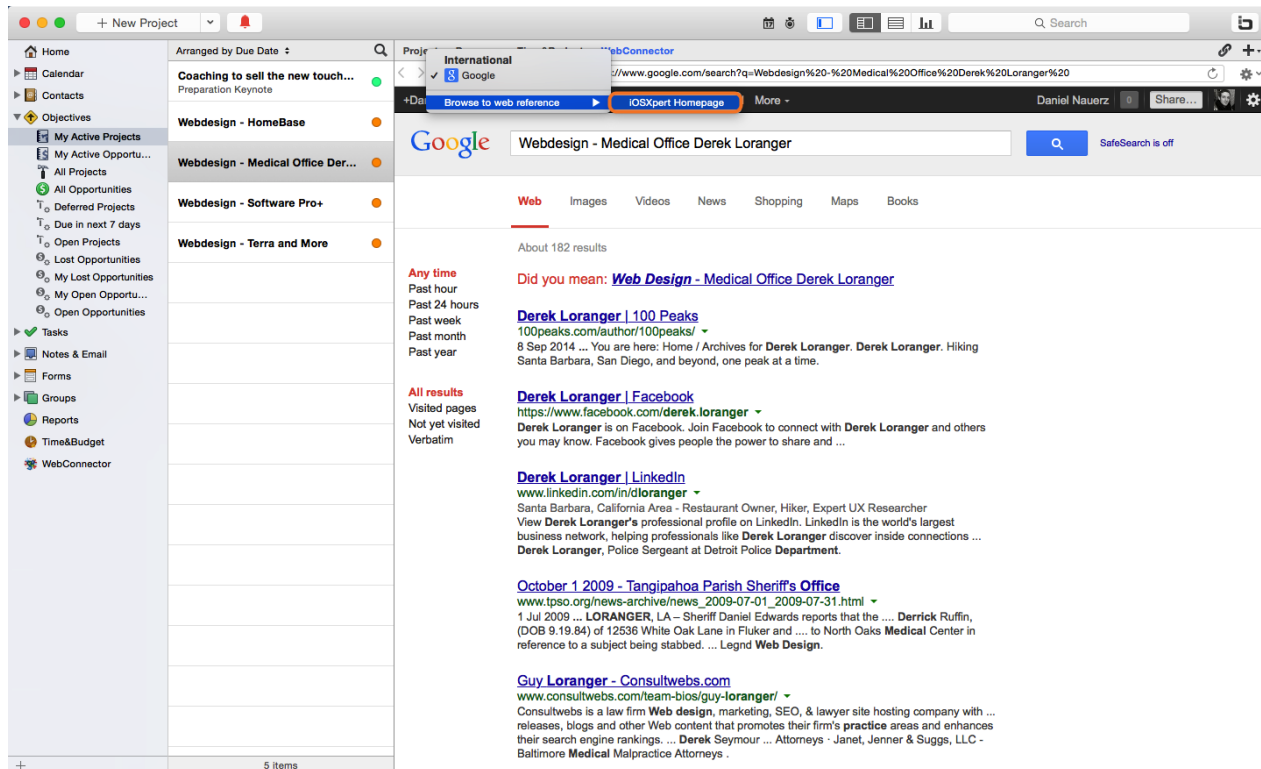
1. Start Daylite
2. Select the desired Daylite object (person, company, project or opportunity)
3. Click WebConnector



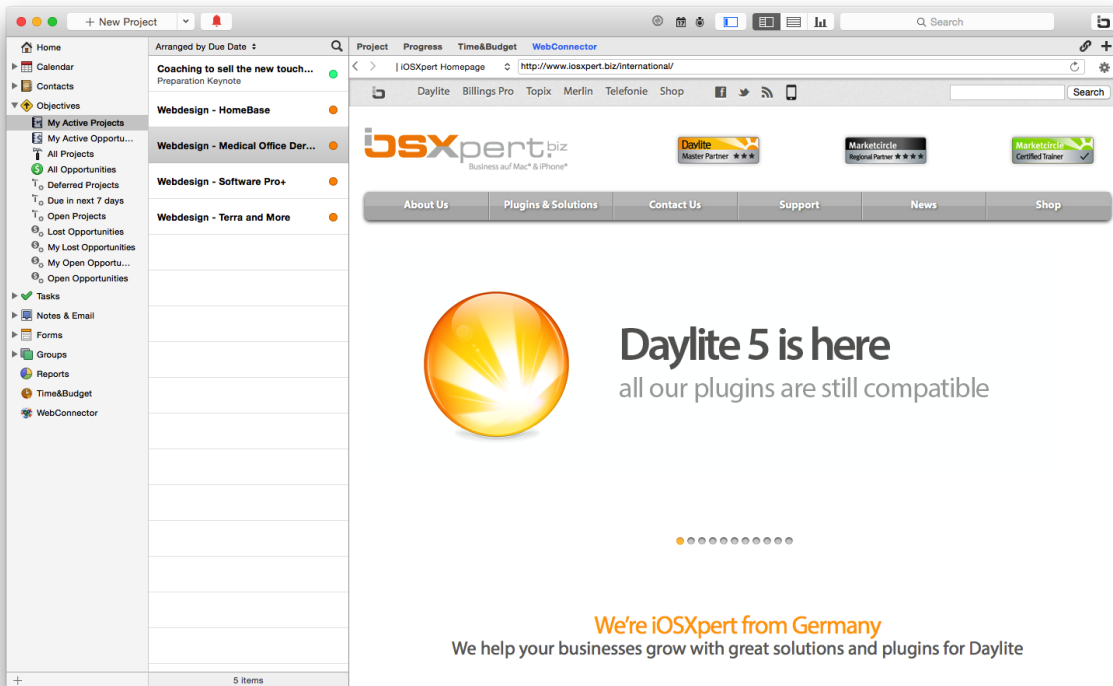
4. Click the drop down menu



5. Select 'Browse to web reference' (projects and opportunities) or 'Browse to label' (persons and companies) and select the desired URL



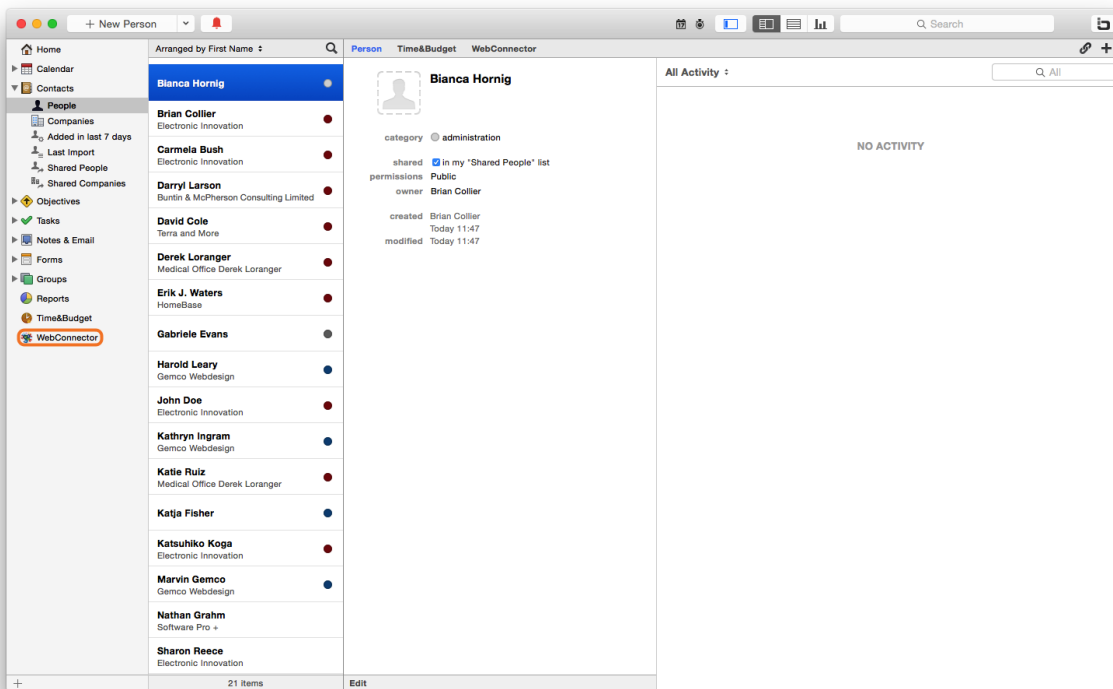
6. WebConnector displays the selected web page



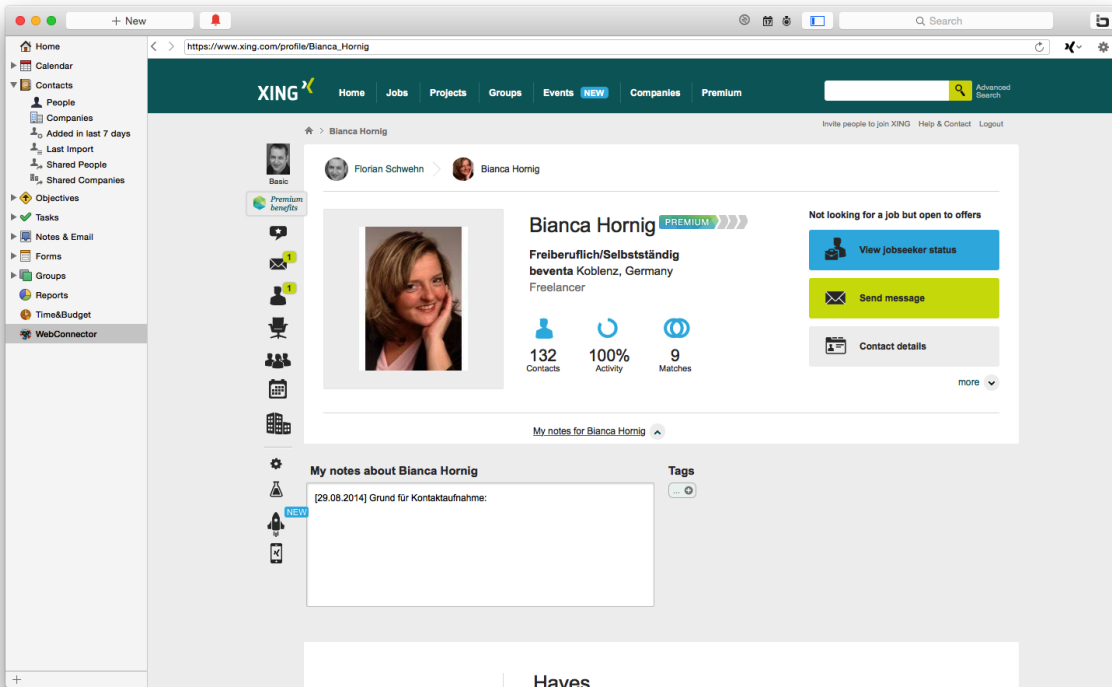
Import and Update Contact Data from XING

Import Contacts

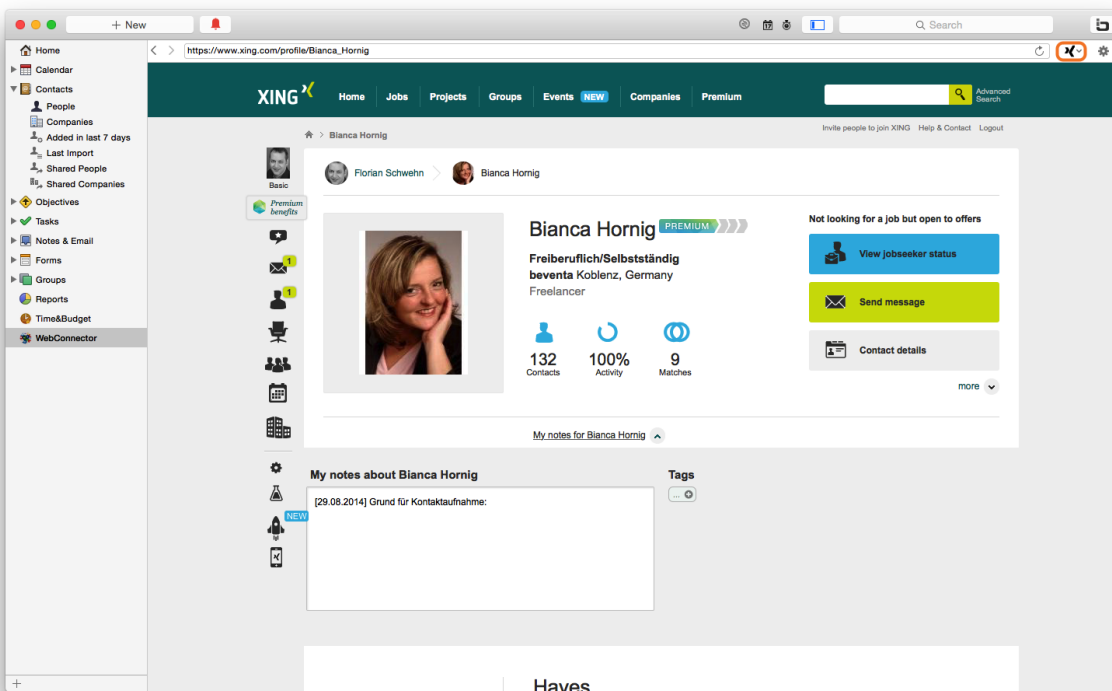
1. Start Daylite
2. Click WebConnector



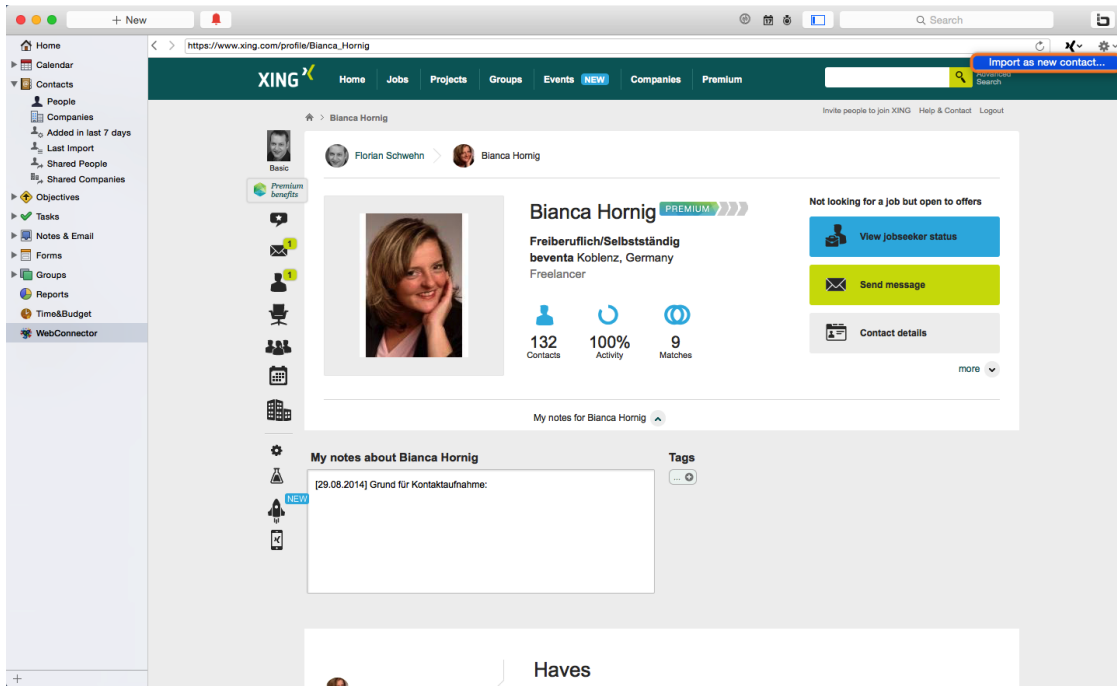
3. Search for a person



4. Click the XING logo



5. Select 'Import as new contact'




6. The following import dialog provides the following options:

- (1) Select which information you would like to import by checking/unchecking the boxes accordingly
- (2) Select which Daylite label you would like to assign to the imported information
- (3) Edit data if needed

XING Import

Bianca Hornig

Image Photo 

Email Business XING Business

Address Business XING Business


Phone Mobile Business XING Mobile Business

Web Addresses XING

7. Click 'Import'

XING Import

Bianca Hornig

Image Photo 

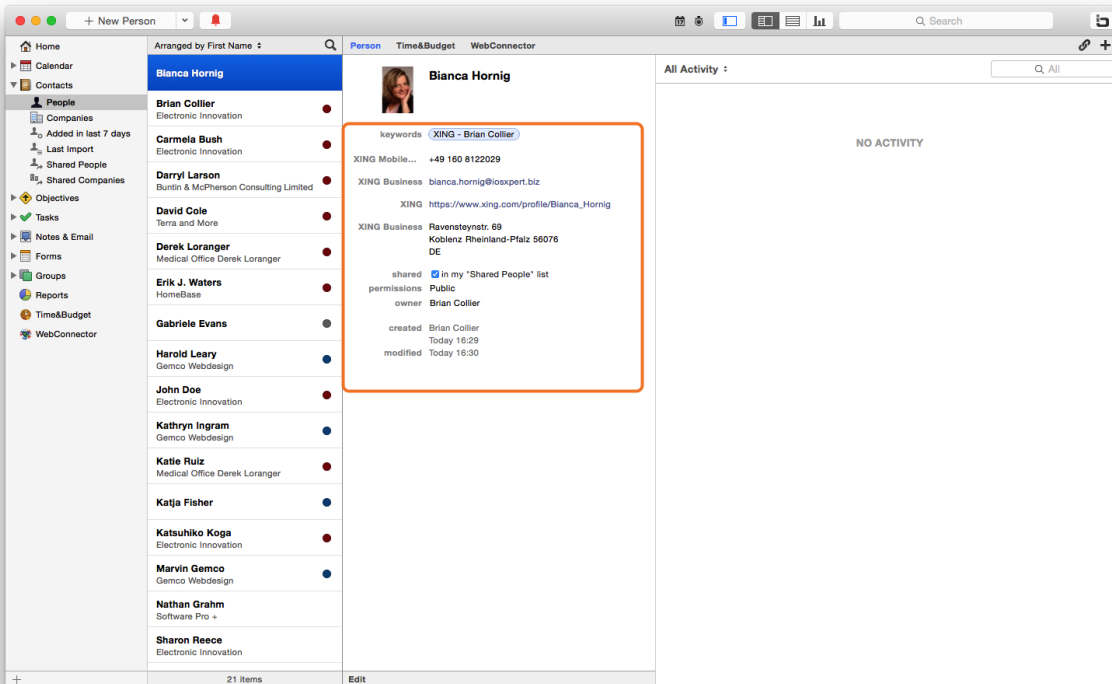
Email Business XING Business

Address Business XING Business

Phone Mobile Business XING Mobile Business

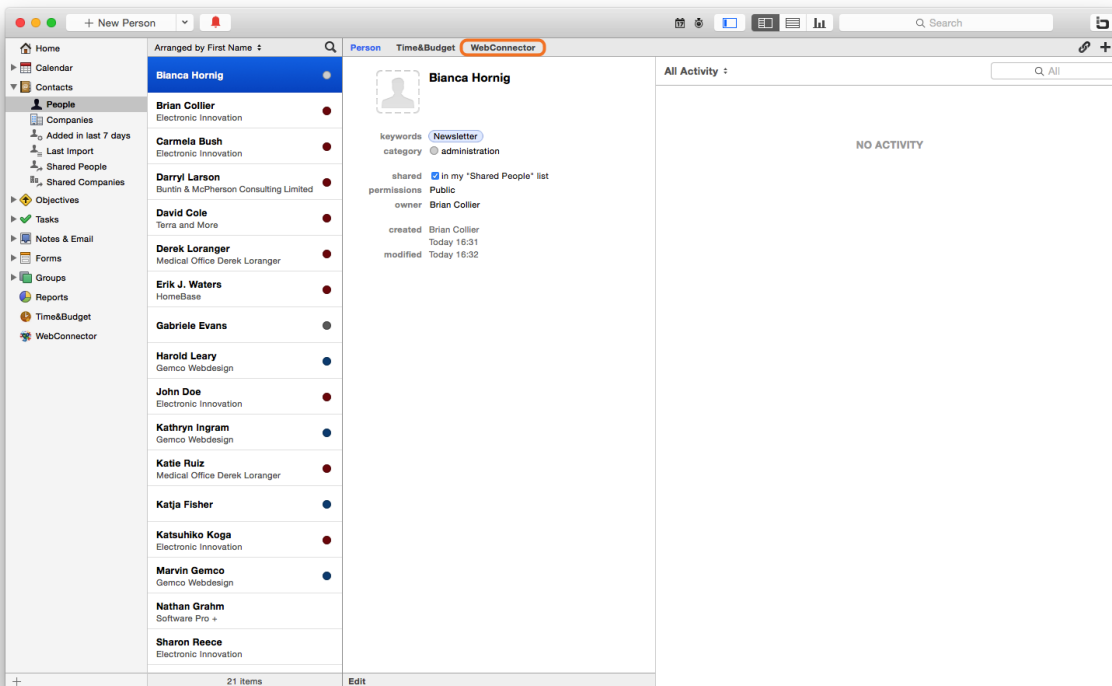
Web Addresses XING

8. The XING contact has been imported successfully

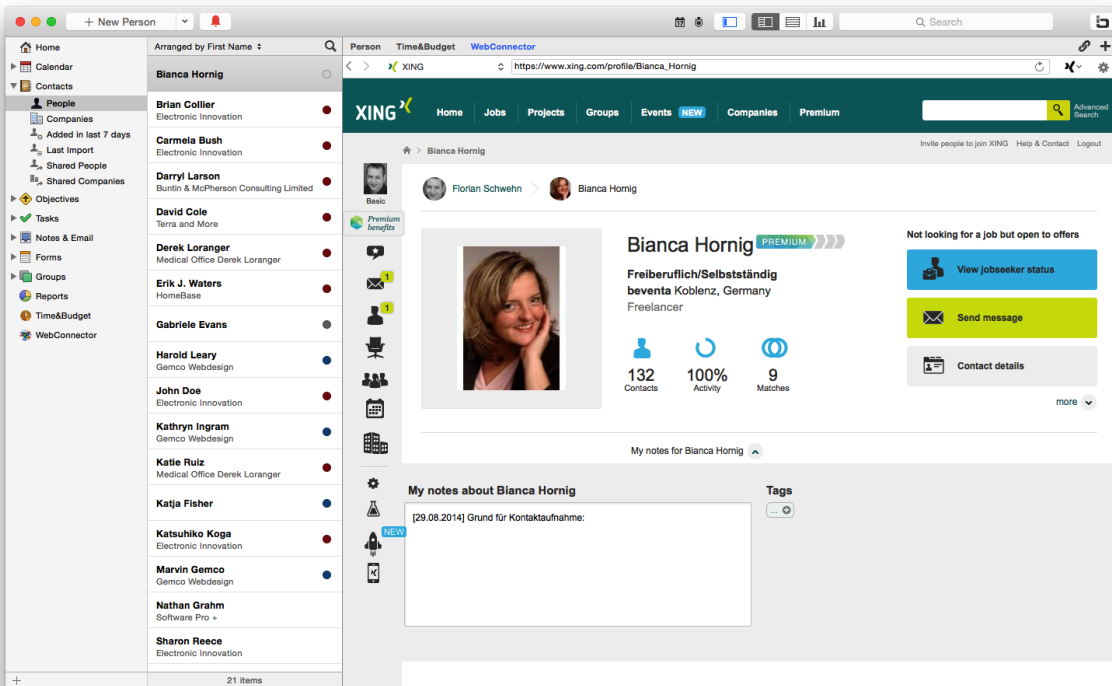


Update a Contact's Details

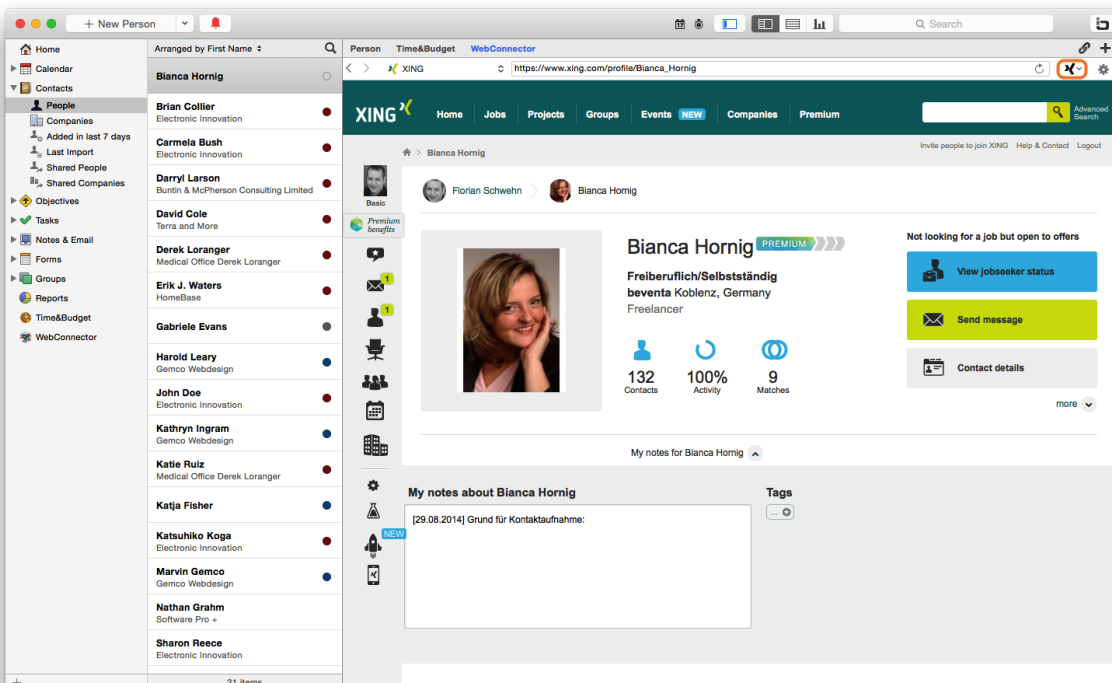
1. Start Daylite
2. Select a person you would like to update
3. Click WebConnector



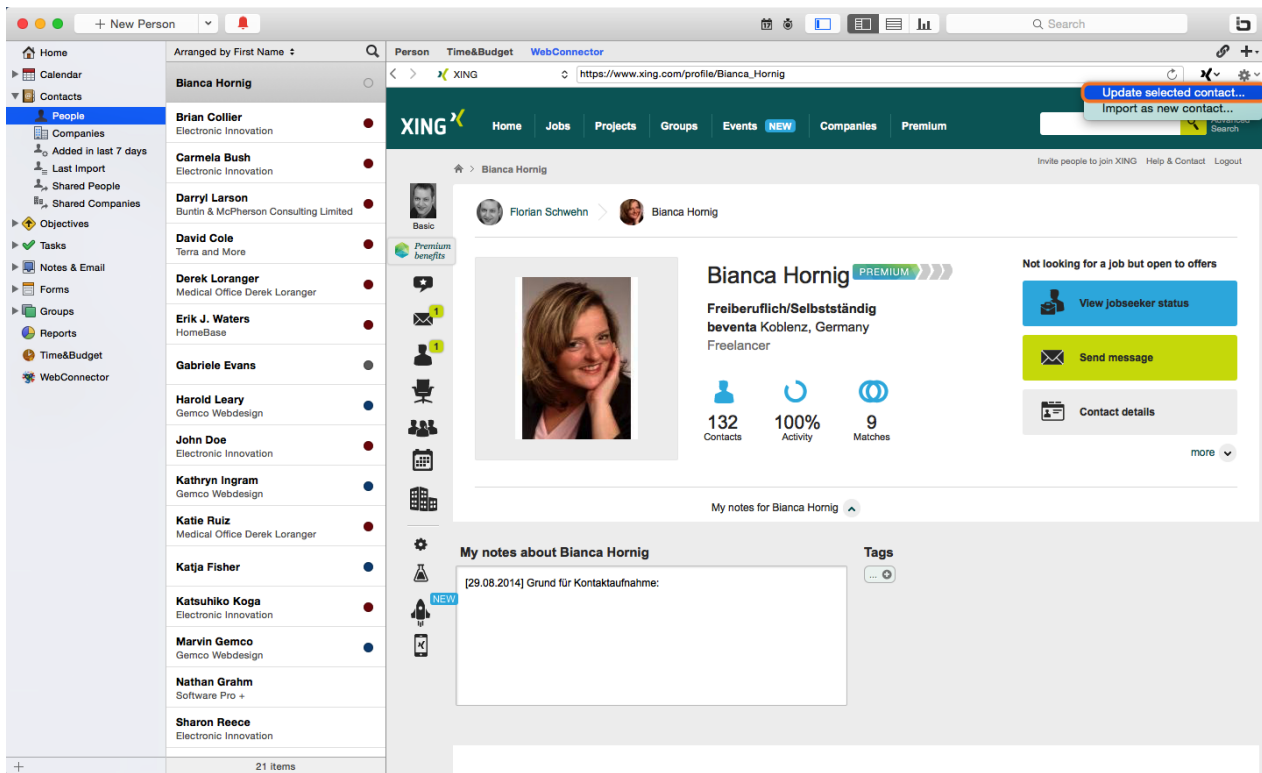
4. Search the person on XING



5. Click the XING logo



6. Select 'Update selected contact'




7. The following update dialog provides the following options:

- (1) Select which information you would like to import by checking/unchecking the boxes accordingly
- (2) Select which Daylite label you would like to assign to the imported information
- (3) Edit data if needed

XING Import

Bianca Hornig

Image
Photo 

Email
Business XING Business

Address
Business XING Business
 Street
 Zip Code
 City
 Province
 Country

Phone
Mobile Business XING Mobile Business


Web Addresses
XING XING

Cancel Import

8. Click 'Import'

XING Import

Bianca Hornig

Image
Photo 

Email
Business XING Business

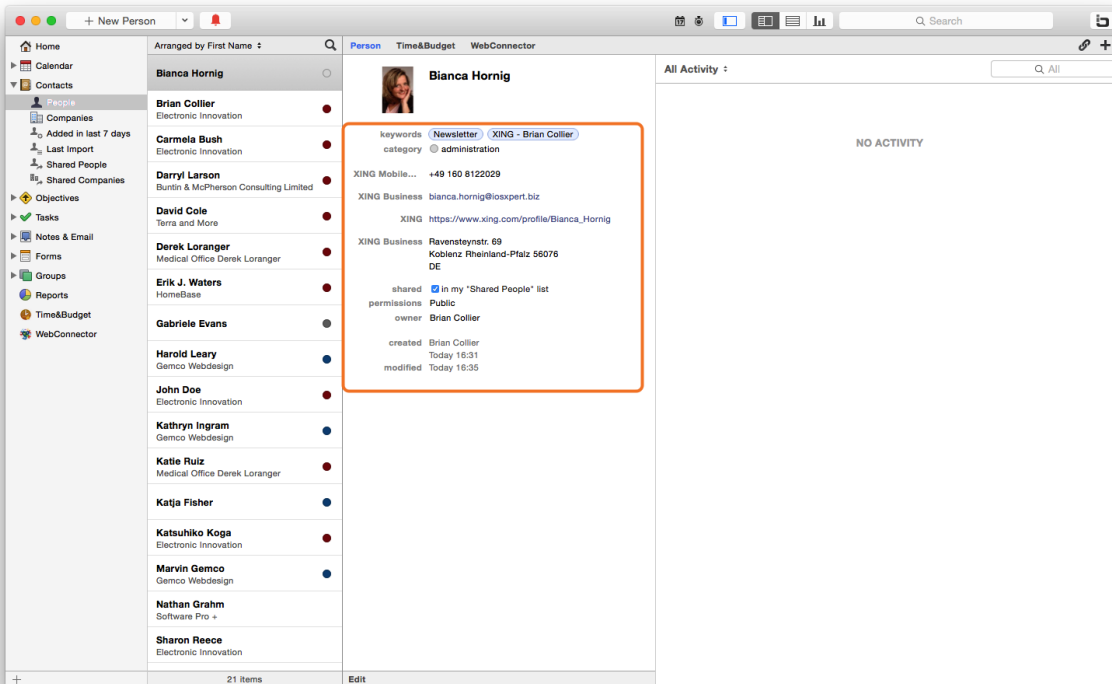
Address
Business XING Business
 Street
 Zip Code
 City
 Province
 Country

Phone
Mobile Business XING Mobile Business

Web Addresses
XING XING

Cancel Import

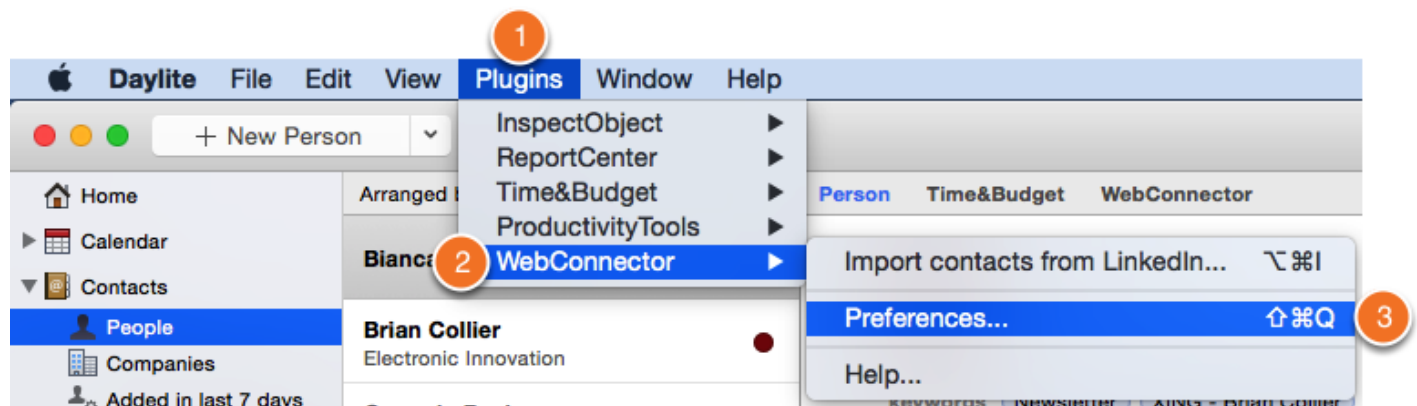
9. The Daylite contact has been updated successfully



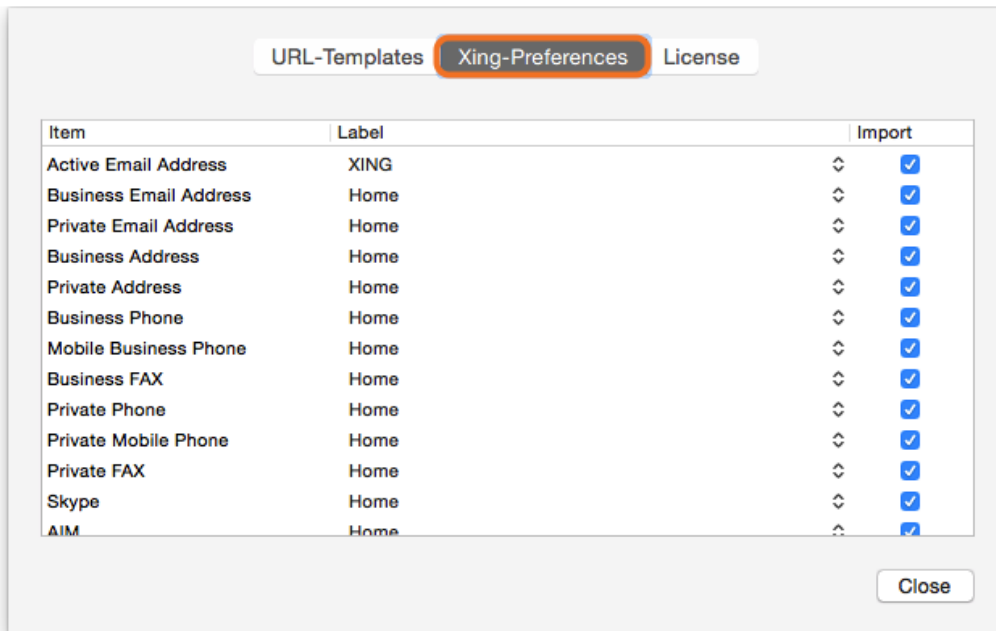
XING Import Preferences

Define your preferences regarding the XING import such as default labels or which data to import:

- (1) Navigate to the Daylite 'Plugin' menu...
- (2) ...WebConnector...
- (3) ...'Preferences...'

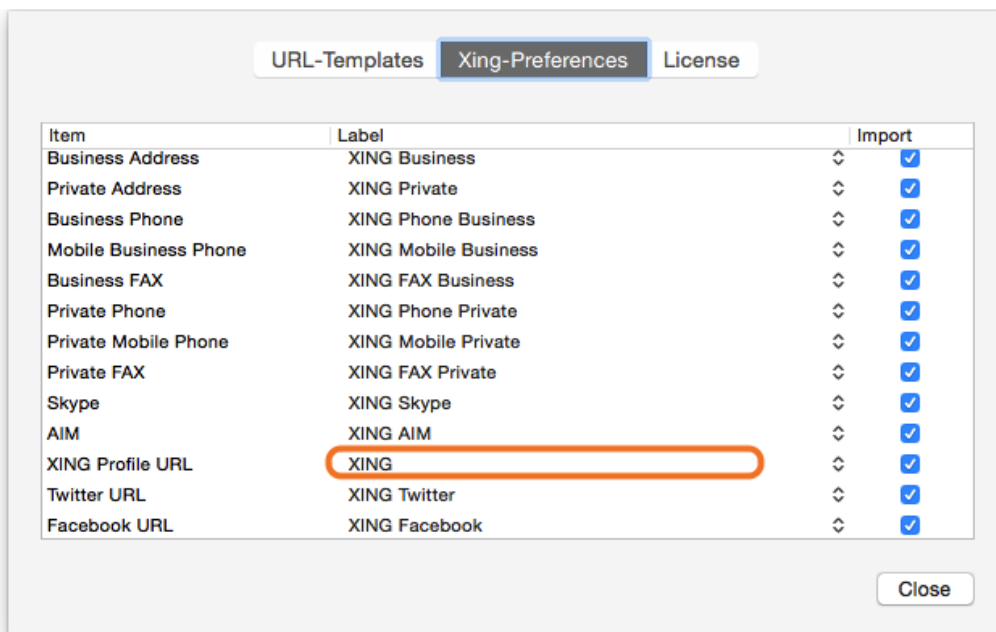


3. Select 'XING Preferences'

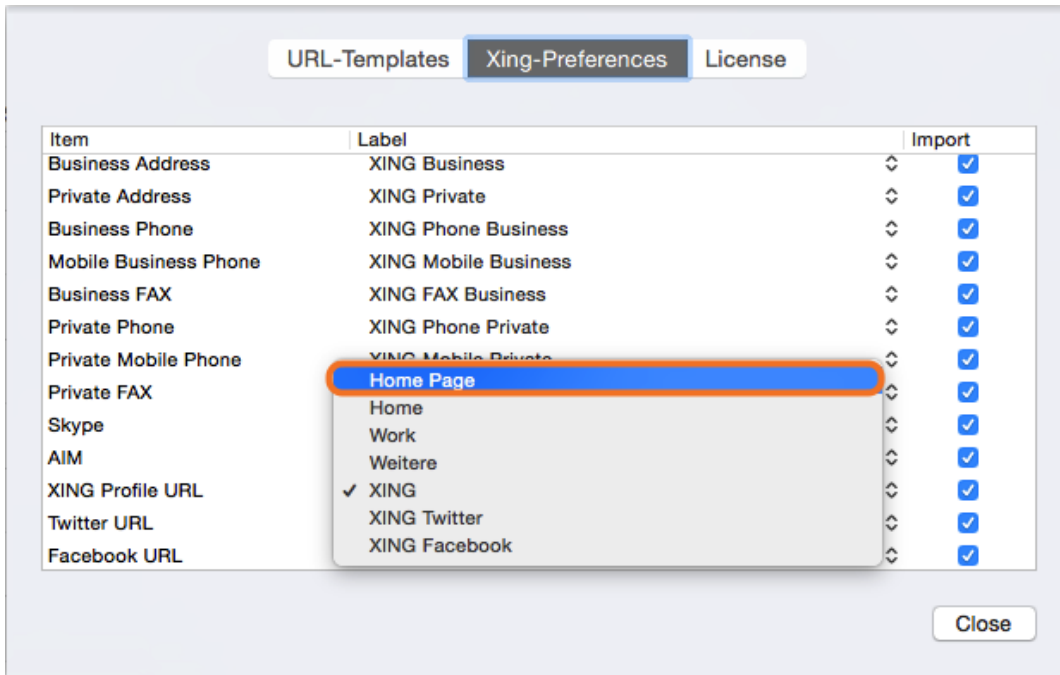


4. The 'Item' column shows all available data fields in XING.

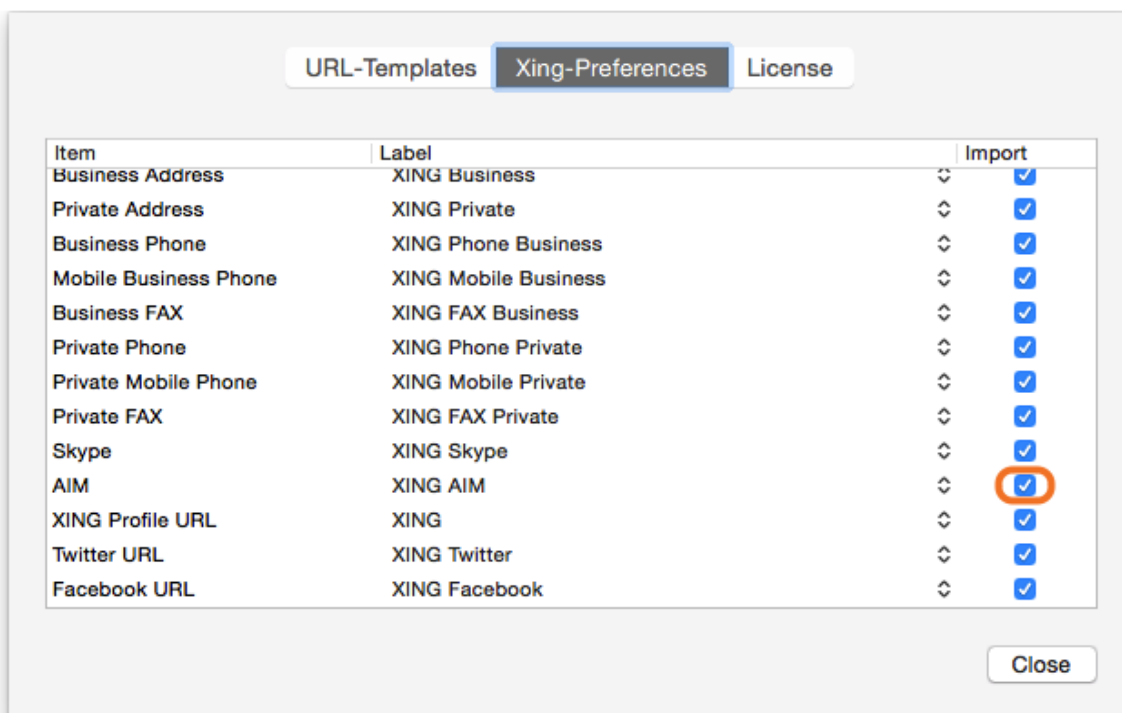
Assign Daylite labels using the middle column.



5. Select the desired label



6. Define which data fields you would like to import from XING. Just check/uncheck the boxes in the 'Import' column accordingly.



7. When done configuring the preferences click 'Close'

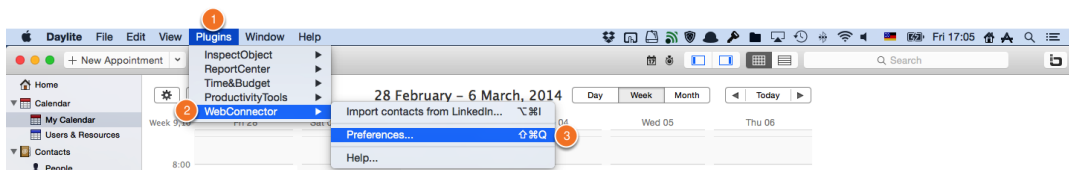
Item	Label		Import
Business Address	XING Business	↕	<input checked="" type="checkbox"/>
Private Address	XING Private	↕	<input checked="" type="checkbox"/>
Business Phone	XING Phone Business	↕	<input checked="" type="checkbox"/>
Mobile Business Phone	XING Mobile Business	↕	<input checked="" type="checkbox"/>
Business FAX	XING FAX Business	↕	<input checked="" type="checkbox"/>
Private Phone	XING Phone Private	↕	<input checked="" type="checkbox"/>
Private Mobile Phone	XING Mobile Private	↕	<input checked="" type="checkbox"/>
Private FAX	XING FAX Private	↕	<input checked="" type="checkbox"/>
Skype	XING Skype	↕	<input checked="" type="checkbox"/>
AIM	XING AIM	↕	<input type="checkbox"/>
XING Profile URL	XING	↕	<input checked="" type="checkbox"/>
Twitter URL	XING Twitter	↕	<input checked="" type="checkbox"/>
Facebook URL	XING Facebook	↕	<input checked="" type="checkbox"/>

[Close](#)

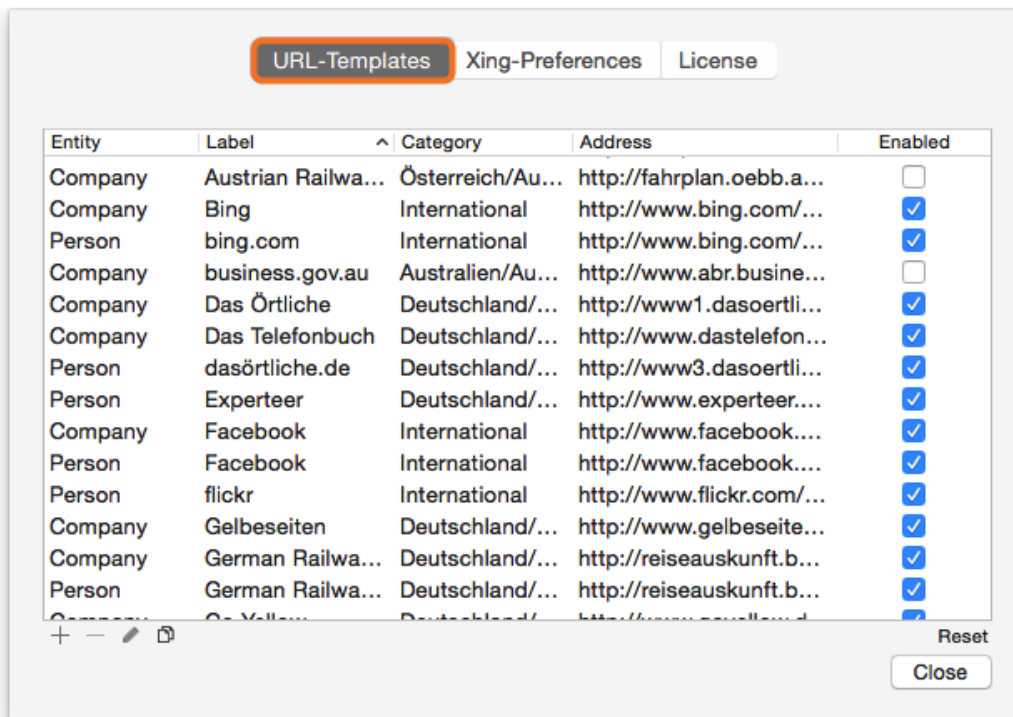
Create and Edit Custom URL templates (For Advanced Users)

In order to create or edit web searches, please follow these steps:

- (1) Navigate to the Daylite 'Plugin' menu...
- (2) ...WebConnector...
- (3) ...'Preferences...'



3. Select 'URL Templates'



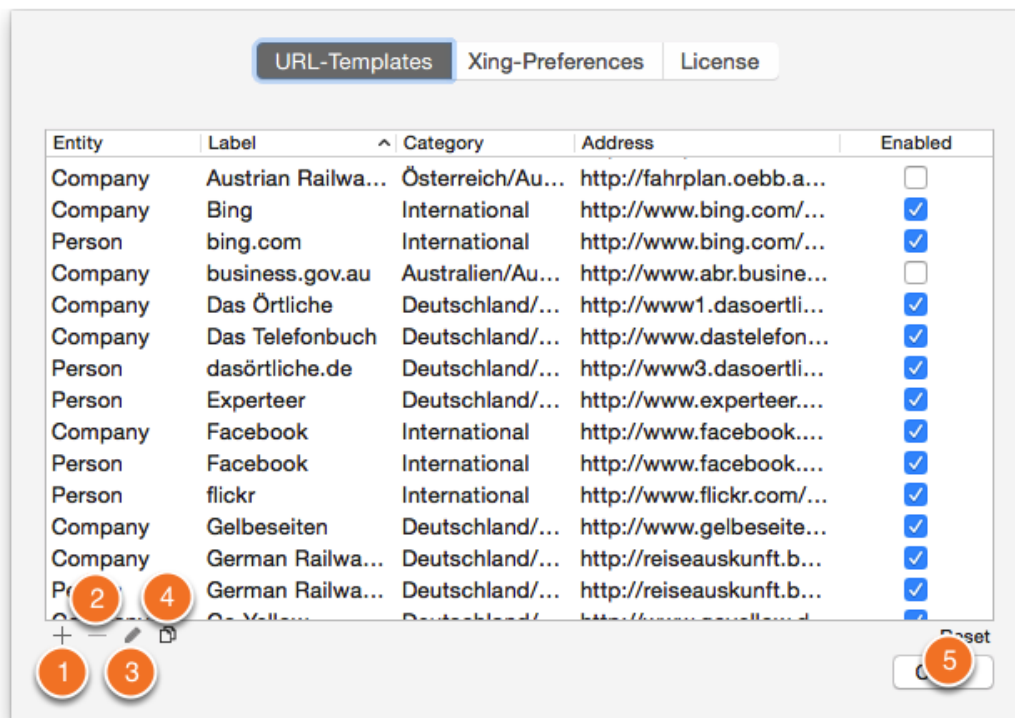
4. Use the following options:

- (1) Create new template
- (2) Delete selected template

(3) Edit selected template

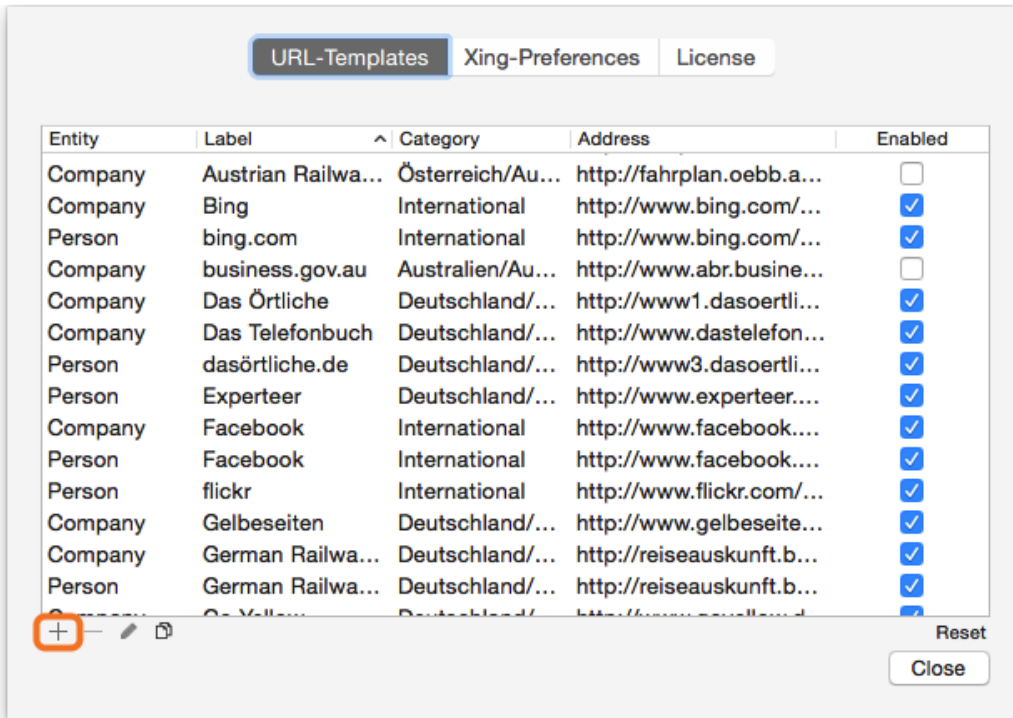
(4) Duplicate selected template

(5) Reset URL templates to factory defaults (doesn't affect custom URL templates)

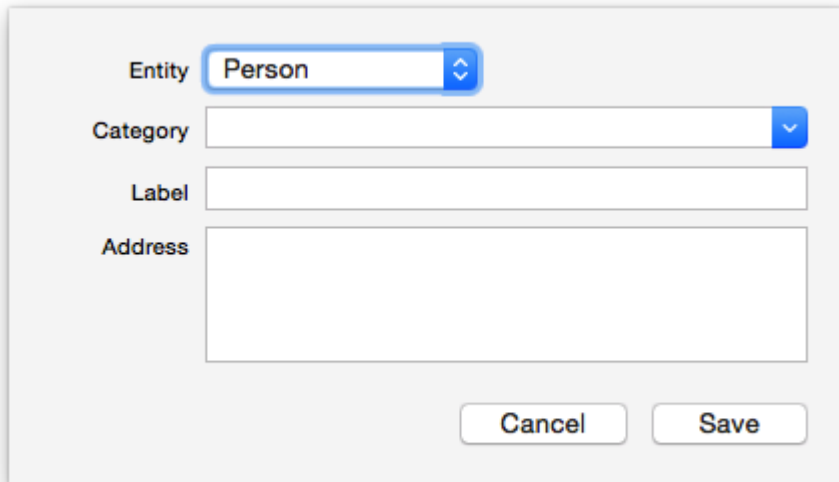


Creating a Custom Template

1. Click the plus sign to create a new template



2. The editor window opens



3. Assign an entity to the template

A screenshot of a form with the following fields: Entity, Category, Label, and Address. The Entity dropdown menu is open, showing options: Person (checked), Company, Opportunity, Project, and Group. The Category field has a dropdown arrow. The Label and Address fields are empty text boxes. At the bottom are 'Cancel' and 'Save' buttons.

3. Select a category or just start typing to create a new one

A screenshot of a form with the following fields: Entity, Category, Name, and Address. The Entity dropdown menu is set to 'Person'. The Category dropdown menu is open, showing 'My new category' (selected) and a list of suggestions: Deutschland/Germany, International, Österreich/Austria, Schweiz/Swiss, and Australien/Australia. The Name and Address fields are empty text boxes. At the bottom are 'Cancel' and 'Save' buttons.

4. Enter a label for the web search

A screenshot of a form with the following fields: Entity, Category, Name, and Address. The Entity dropdown menu is set to 'Person'. The Category dropdown menu is set to 'My new category'. The Name field contains the text 'My new search item'. The Address field is empty. At the bottom are 'Cancel' and 'Save' buttons.

5. Enter the search engine's URL and populate it with merge keys.

Example:

A Google search for 'Peter Test' would look like this:

<https://www.google.com/#q=peter+test>

Now you need to replace the person's first and last name the appropriate merge key. Merge keys are placeholders for information stored in Daylite. A list of merge keys available in Daylite here: [Daylite Data Model](#)

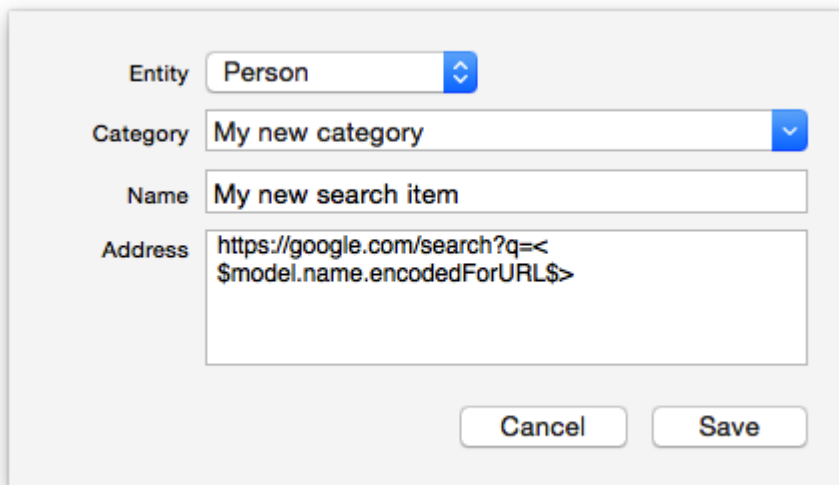
In our example we're adding the following merge key to the URL:

<\$model.name.encodedForURL\$> (A persons full name. 'encodedForURL' has been added to ensure special characters not compliant with the URL scheme (e.g. ä, ö or ü) are being converted.)

Integrate the merge key in the URL to replace the previous search string 'peter test'. The result looks like this:

[https://google.com/search?q=<\\$model.name.encodedForURL\\$>](https://google.com/search?q=<$model.name.encodedForURL$>)

Please note: If you have questions regarding URL templates or you need assistance please contact us using our support [form](#)



The image shows a configuration dialog box with the following fields:

- Entity:** A dropdown menu with 'Person' selected.
- Category:** A dropdown menu with 'My new category' selected.
- Name:** A text input field containing 'My new search item'.
- Address:** A text input field containing the URL template: `https://google.com/search?q=<$model.name.encodedForURL$>`

At the bottom of the dialog are two buttons: 'Cancel' and 'Save'.

6. Finalize the template by clicking 'Save'

Entity **Person**

Category **My new category**

Name **My new search item**

Address **https://google.com/search?q=< \$model.name.encodedForURL\$>**

Cancel **Save**

7. The newly created template will be available when selecting a person in Daylite

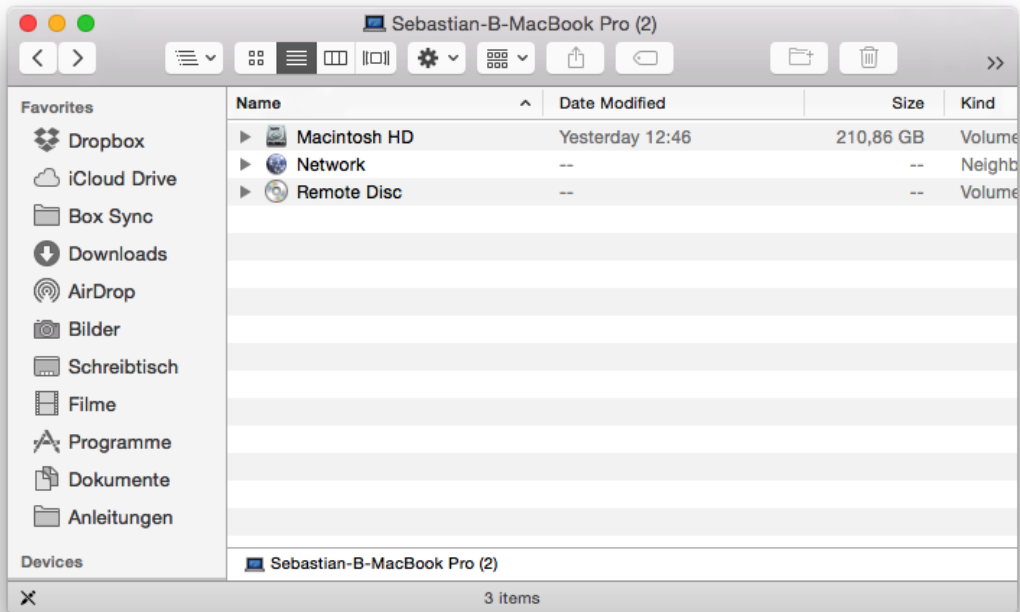
The screenshot shows the Daylite interface with a contact list on the left and a search dropdown menu open over a browser window. The contact list includes names like Bianca Hornig, Brian Collier, Carmela Bush, Daniel Nauerz, Darryl Larson, David Cole, Derek Loranger, Erik J. Waters, Gabriele Evans, Harold Leary, John Doe, Kathryn Ingram, Katie Ruiz, Katja Fisher, Katsuhiko Koga, Marvin Gemco, and Nathan Graham. The search dropdown menu is open, showing various search engines and the newly created category 'My new category' with the search item 'My new search item' highlighted. The browser window in the background shows a search for 'Bianca+Hornig' on Bing.com, displaying search results for Bianca Hornig.

Other information

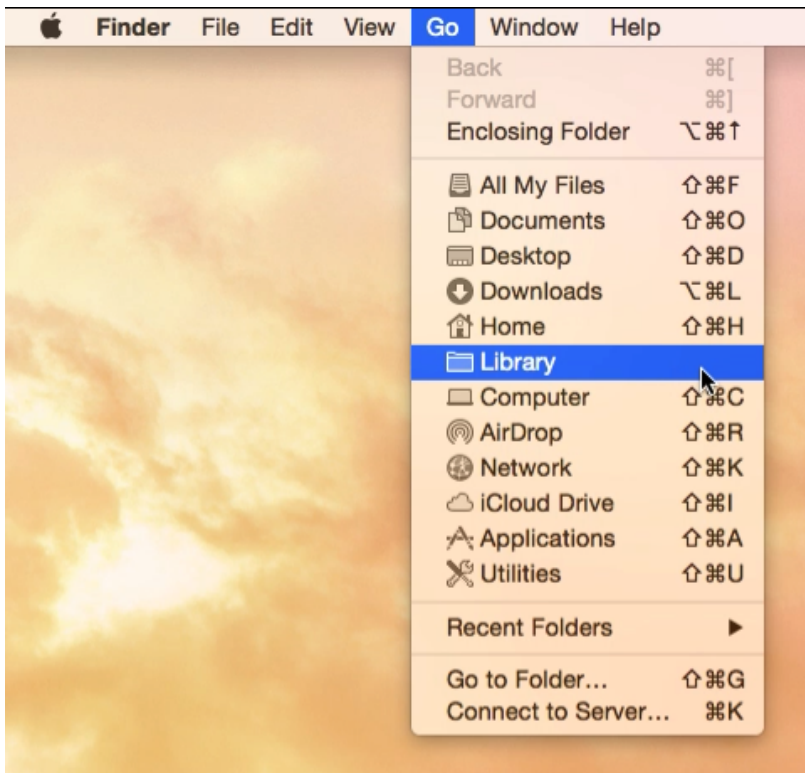
How to uninstall a plugin

In order to uninstall a plugin, please do the following steps:

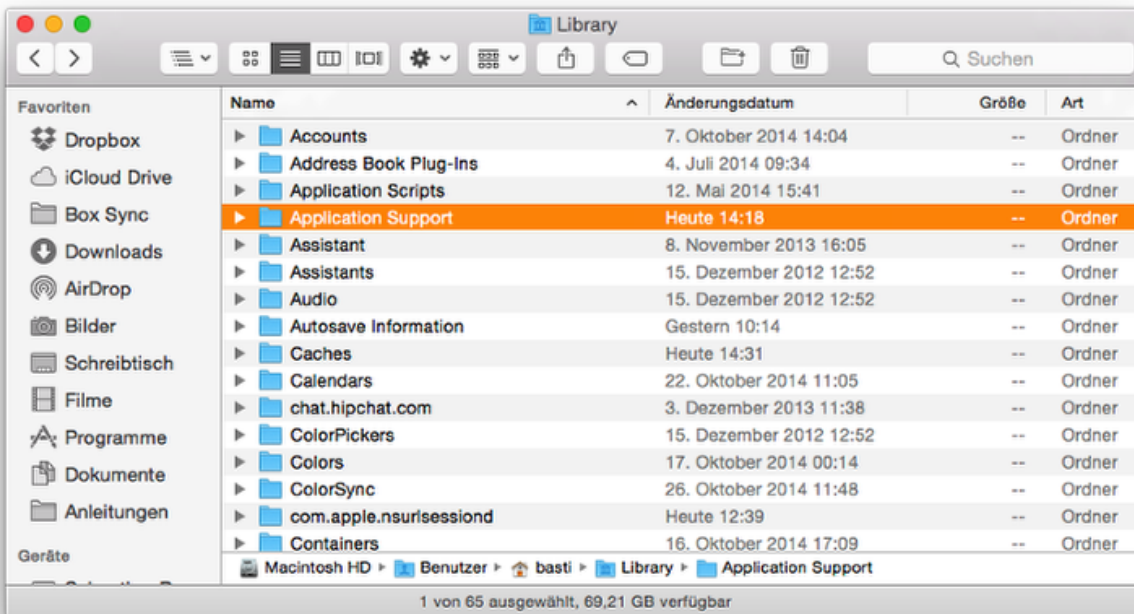
1. Open a Finder window



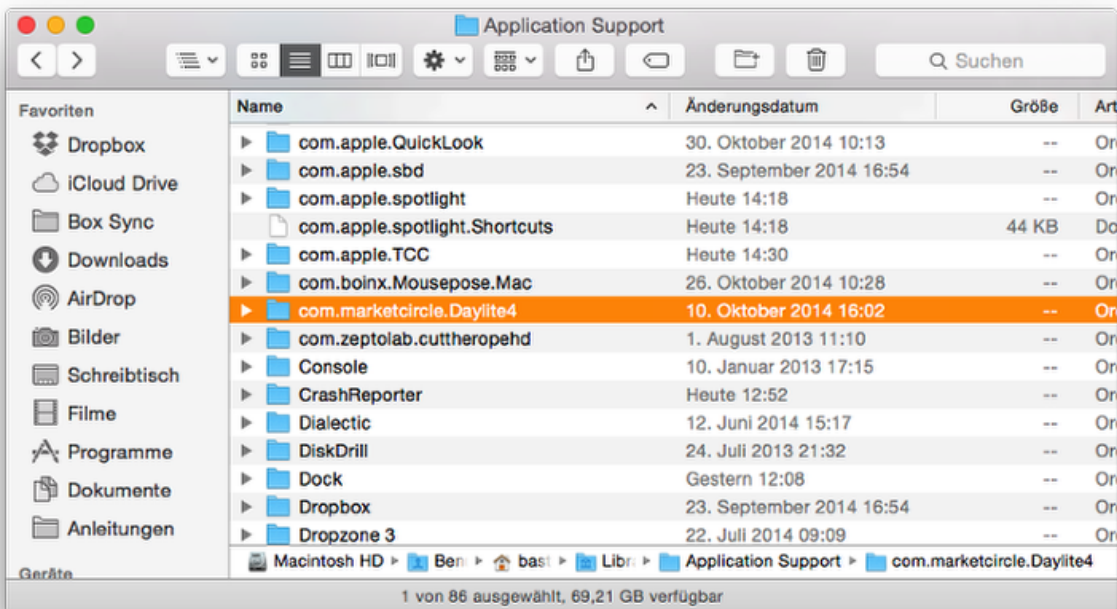
2. Click Go in the Finder menu, hold down the ⌘ [alt] key and select Library



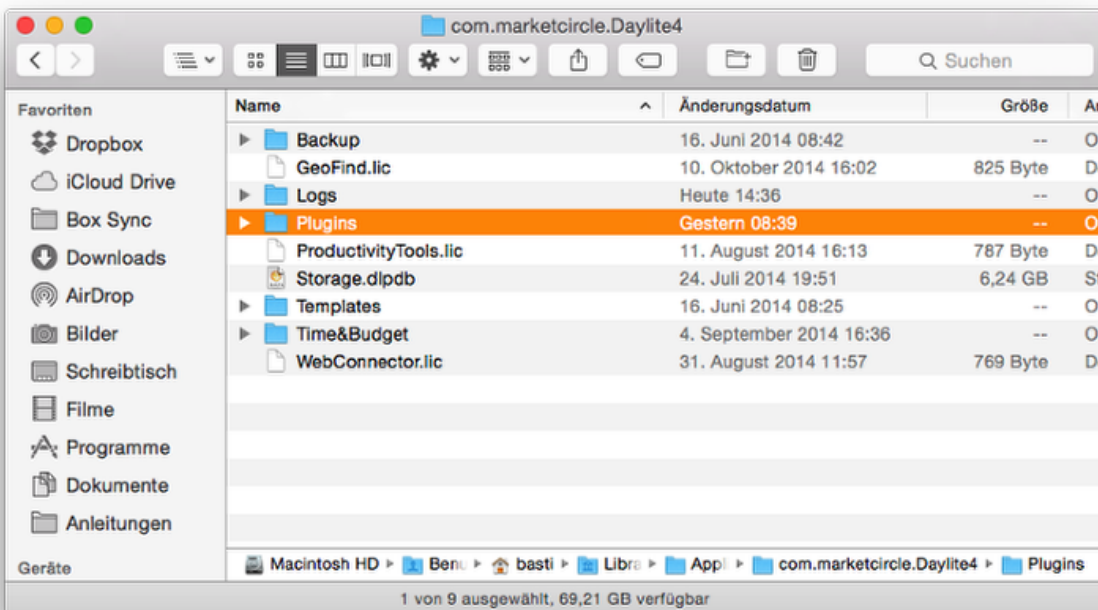
3. Navigate to Application Support



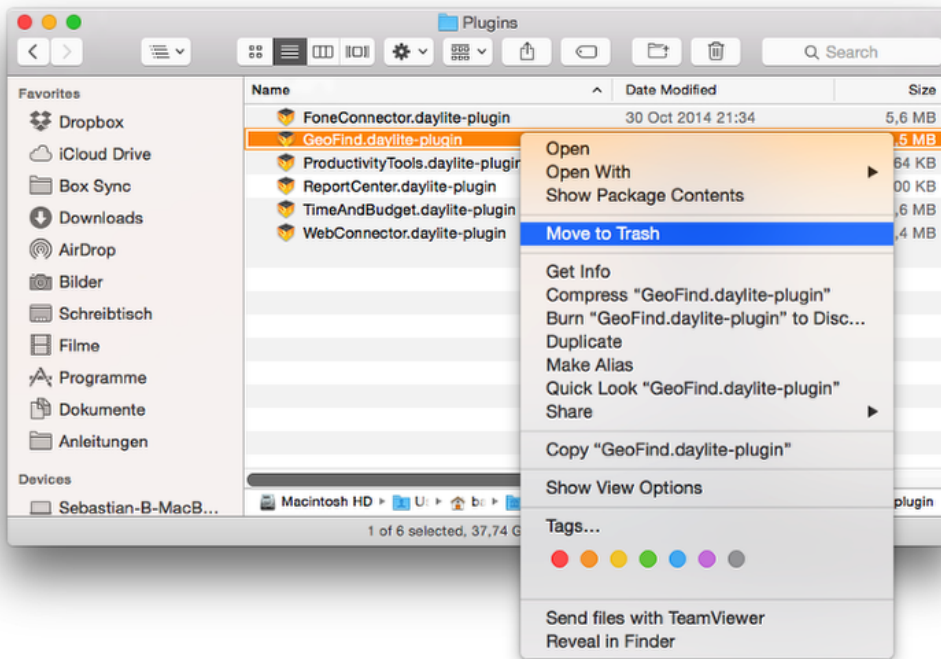
4. Navigate to com.marketcircle.Daylite4



5. Navigate to Plugins



6. Delete the appropriate plugin



7. Restart Daylite