AddressGrabber

Business

User Guide

Contents

Preface

This guide explains in detail about the features of AddressGrabber Business. You can find step-by-step instructions to work with the software.

To start with, you can work with the sample addresses provided with the software.

Refer to the Quick Start Guide to install and register the software.

Follow the conventions used in this guide for better understanding of the features.

Conventions

The following conventions are used in this guide:

Convention	Description
	Note: Important or supplemental information.
	Tip: suggestions that are supportive.

1. About AddressGrabber Business

Using AddressGrabber Business, you can transfer addresses from any source that contains addresses into various applications. AddressGrabber extracts the information like Name, Phone, Address, E-mail, Zip and so on. This extracted information can be transferred into appropriate fields in your application.

You can extract addresses from email, documents, web pages or from any address book and transfer the information into various applications.

1.1. Features

- Streamlined process of web form transfer.
- Schedule activities to a contact that enables you to follow your leads quickly.
- Transfer addresses to online web forms
- Verify addresses with USPS website.
- Format the information before transferring into your application.
- Remove unwanted characters while capturing addresses from web forms or email signatures.
- Check for duplicates while transferring into database application like ACT!, Outlook etc.
- Transfer default values to the contact and user fields in ACT! and Outlook.

1.2. Supported Applications

AddressGrabber business supports various applications like CRM packages, Contact Managers, etc.

1.3. AddressGrabber Toolbar

After installation, AddressGrabber is launched as a floating toolbar. AddressGrabber can be minimized to appear as System Tray Icon.
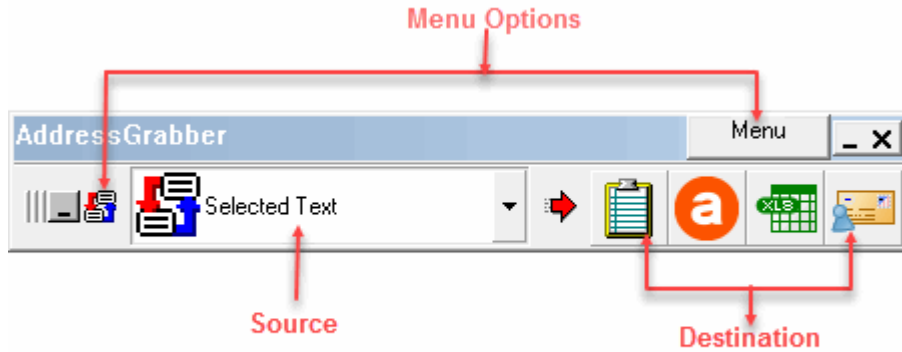
Figure 1: AddressGrabber Toolbar

- From the left pane of the toolbar, you can select the **Source** from which you want to transfer the addresses.
- The **Destination** Applications are displayed in the right pane as Icons.
- You can add or remove the destination icons by using the Menu Options. You can customize the default settings by using the Menu Options.

The following table describes the options available in the Menu:

Menu Option	Function
Options	Customize the default settings. Refer Chapter 2 for more details.
Minimize toolbar	Minimize AddressGrabber toolbar to the System Tray.
Toolbar Always in front	Toolbar always appears in front of other open applications.
Show Smaller / Larger toolbar	Change the size of the toolbar.
Show Transfer Log	View the transferred details saved in a log file.
Sample	Sample list of address to test the transfer.
About AddressGrabber	Displays information about AddressGrabber Business like version number, copyright and contact information.
Help Topics	Launches the Online Help.
Demo	Launches a demo about AddressGrabber.
Info and Support	Opens the Technical support page from the eGrabber website.
Register / Unregister	Opens **eGrabber Product Registration** dialog box to register or unregister the product.
Live Update	Live Update service is used to instantly update AddressGrabber with the latest files and the service packs.
Exit AddressGrabber	Quits AddressGrabber Business.

The same menu options are also available when you right-click the System Tray Icon.

2. Customize AddressGrabber

Using the AddressGrabber Options, you can

- Configure the transfer options for source and destination application.
- Add or hide destination applications in the toolbar.
- Customize settings to transfer web forms.
- Format the Contact Information.
- Setup miscellaneous options.

2.1. AddressGrabber Options

To launch the AddressGrabber Options,

- Click **Menu / Options** in the AddressGrabber toolbar.

    [OR]

- Click in the AddressGrabber toolbar.

    [OR]

- Right click the System Tray Icon and select **Options**.

The AddressGrabber Options window contains the following:

Click	To Do…
Source Links	Customize the Source Application before transferring the information
Destination Links	Customize the Destination Application before transferring the information.
Miscellaneous	Setup Additional Options.
Customize Extraction	Setup web forms before transferring into destination application.
Format	Format the contact information, phone/fax, email etc., before transferring to your database.
Add / Hide Applications	Add or remove applications displays in the AddressGrabber toolbar.
My Address	Enter your personal details and you can transfer these details into the destination application if required.

2.2. Customize Source Application

You can add a Source Application to the AddressGrabber toolbar.

- In the **Source Links** window, select the application and click **OK**.

- The application is listed in the toolbar.
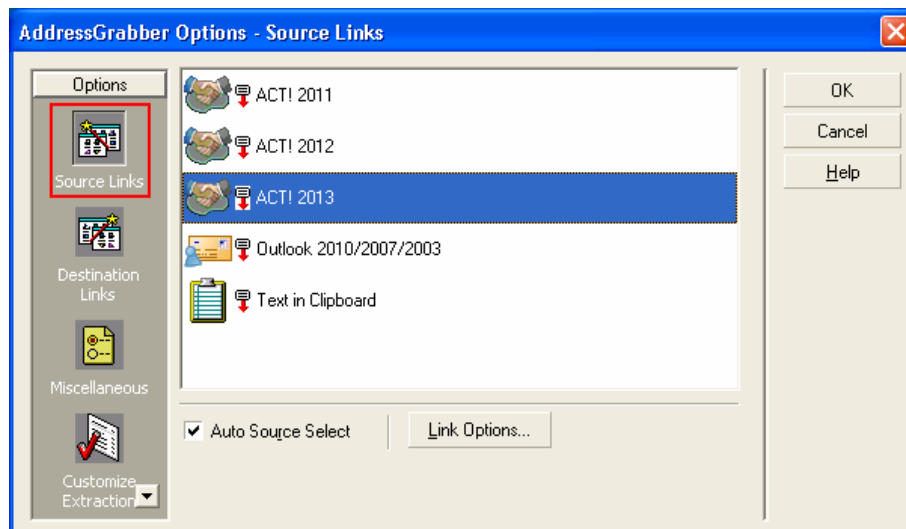
Figure 2: Source Links

Auto Source Select: Select this option so that AddressGrabber automatically detects the source application and displays in the AddressGrabber toolbar.

Example: Open your Outlook and AddressGrabber Toolbar automatically displays Microsoft Outlook as the Source.

Link Options for Source Application

- Select your source application and then click **Link Options**.

- The **Link Options** dialog box opens for the selected source application and the modes of transferring addresses vary for each application.

- **Link Options** customize the settings for your Source application before transferring into your destination application.

The Link Options for various applications are explained in later chapters.

2.3. Customize Destination Application

You can add or remove a destination icon to the AddressGrabber toolbar.

You can also use the **Link Options** to customize the transfer settings of the destination application.
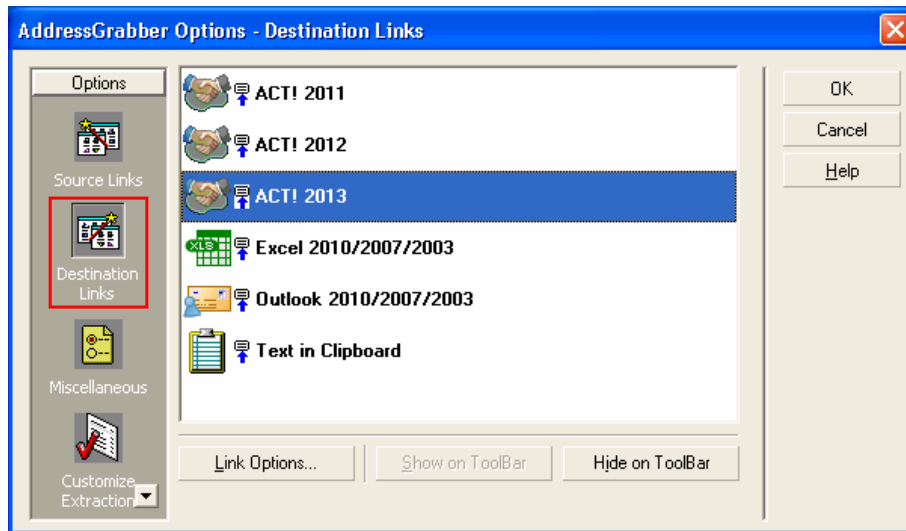
Figure 3: Destination Links

To Add an Icon

- In the **Destination Links** window, select the appropriate destination application and click **Show on ToolBar.**
- Click **OK.**

Now the selected destination appears in the toolbar.

To Remove an Icon

- In the **Destination Links** window, select the appropriate destination application and click **Hide on ToolBar.**
- Click **OK.**

Now the selected destination is removed from the toolbar.

Link Options for Destination Application

- Select your destination application and then click **Link Options**.
- The **Link Options** dialog box opens for the selected destination application and the modes of transferring addresses vary for each application.
- **Link Options** customize the settings for your destination application before transferring the contact details.

The Link Options for various applications are explained in later chapters.

2.4. Miscellaneous Settings

You can customize your System Tray con and other options by using the **Miscellaneous** settings.
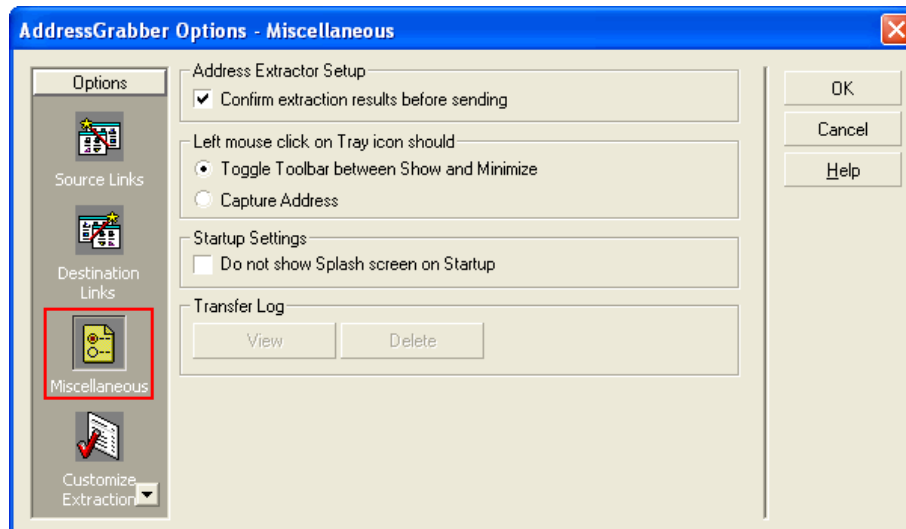
Figure 4: Miscellaneous Settings

You can setup the following options:

Under **Address Extractor Setup**,

- **Confirm extraction results before sending:** This option is selected by default. Select or clear this option to show or hide the Parse Results Window.

> While transferring addresses, a Parse Results Window appears with the details of extracted Contact details. You can verify the details, edit them if required, format the details, and then transfer the information into the destination. Refer to Chapter 3 for more details about Parse Results Window.

Under **Left Mouse Click on Tray Icon should,**

You can customize the left mouse click on the system tray icon.

- **Toggle toolbar between show and minimize:** This option is selected by default. Select this option to maximize or minimize the toolbar when you left mouse click on the system tray icon.

- **Capture Address:** Select this option if you want to transfer address from the currently selected source to destination.

> Move the Mouse Pointer over the System Tray Icon to view the currently selected source and destination.

Under **Startup Settings,**

- **Do not show Splash Screen at Startup:** Select this option to hide the splash screen that appears when you launch AddressGrabber.

Under **Transfer Log**,

After transferring the information, the details of transfer status and other information related to the process are saved in a log file. The log file contains transferred details like Date, Time, Source, Destination, Incoming Address, Web form etc.

- Click **View** to view the contents of log file.

- Click **Delete** to remove the log file.

> The transfer details are appended to the log file. When the file size becomes 500 KB, a new log file is generated. The old log file is not deleted. You can delete these files by using the miscellaneous settings.

> You can also view the log files from the toolbar. Click **Menu / Show Transfer Log** to view the log files.

Click **OK** to save settings.

2.5. Customize to transfer web forms

AddressGrabber can transfer addresses from various web forms into your applications. The method of extraction of address from web form can be customized.

You need to map the web form tags to your application to transfer the data accurately.

You can setup the following options before transferring from web forms.

- Map web form tags automatically or manually.

- Transfer default values to the contact and user fields of your applications.

- Handle unwanted characters in the address.

- Find and Replace keywords to rectify fields that are misinterpreted.

- Remove E-mail junks from the header.
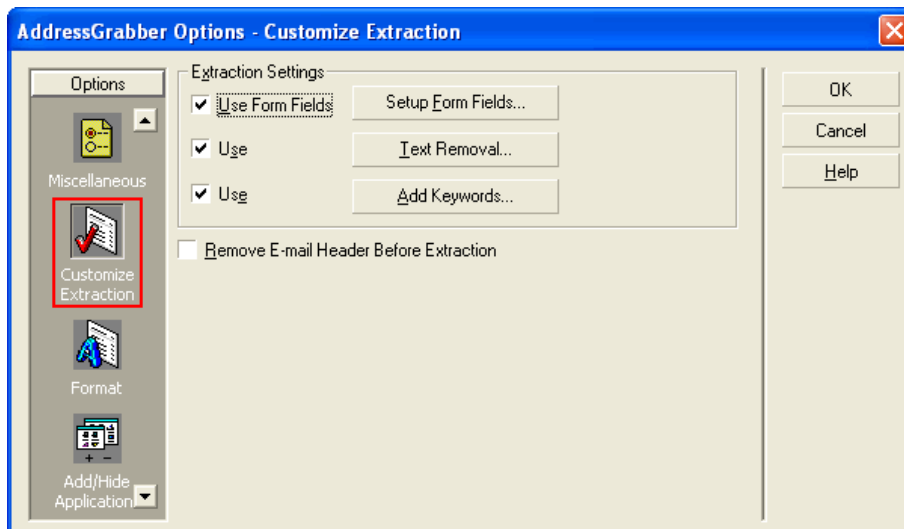
Figure 5: Customize Extraction

2.5.1. Use Form Fields – Setup Form Fields

Click **Setup Form Fields** to launch the form wizard that guides you to map form tags globally for all applications. This ensures high accuracy while transferring data from web forms.

There are three modes of mapping in **Form Field Extraction Method**:

- **Auto - Extract mode:** Automatically maps your web form tags.

- **Manual Mode:** Enter form tags manually.

- **Preview / Edit Existing Settings mode:** You can add form tags and set default values for Contact and User fields.

Using Form wizard you can

- Map Form tags manually or automatically.

- Add default values to the Contact fields.

Map form tags automatically for all applications

Step 1: Select form fields extraction method

Select **Auto-Extract Mode** under **Form Field Entry**.
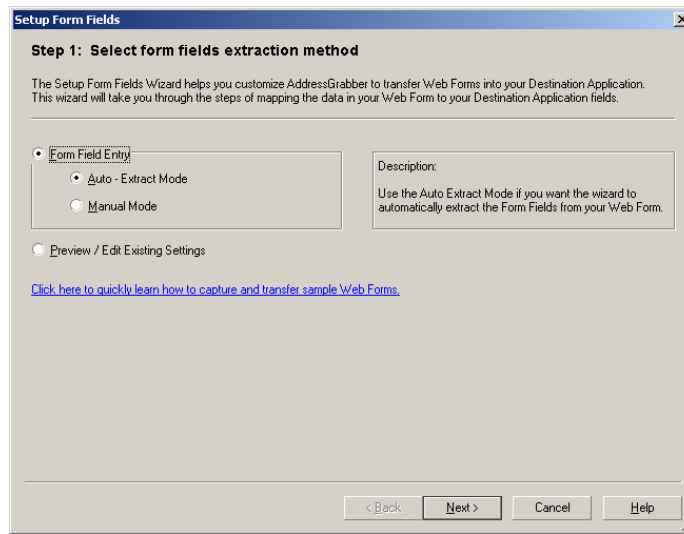
Figure 6: Select form fields extraction method

Click **Next**.

Step 2: Paste your form

Paste or type your web form in the space.
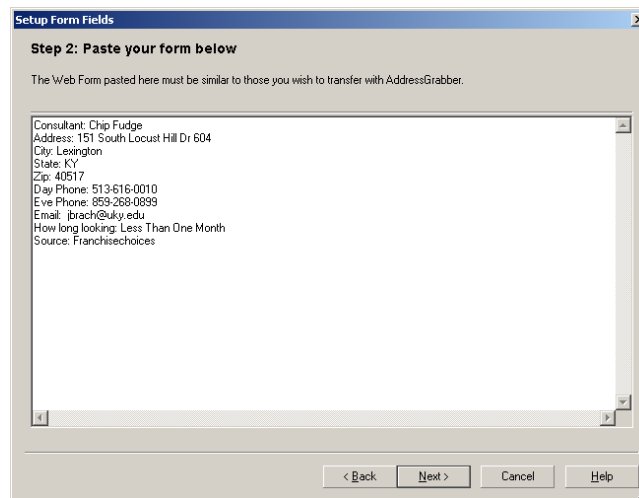
Figure 7: Paste your form

Click **Next**.

Step 3: Select field separator on your form

The separator is detected automatically from the web form and displayed next to **Field separator for form text**. If the separator is not detected type the separator of your web form.

Example:

Form Tag   Form Data

Refer**:**   Submit

In this example,: **[Colon]** is the separator.
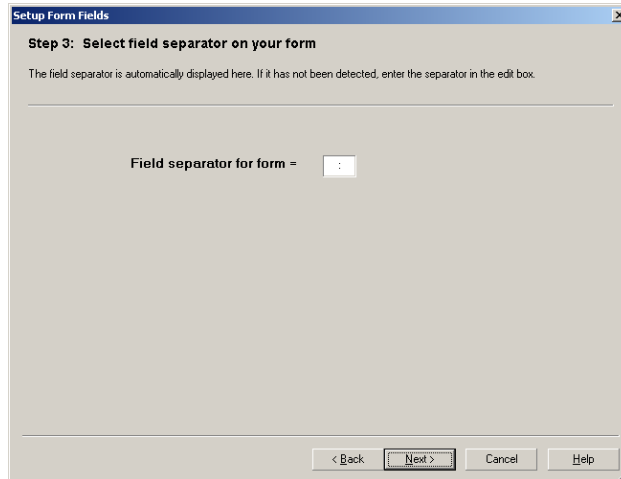
Figure 8: Select field separator on your form

Click **Next.**

Step 4: Map Field Names in Form to fields in destination application

After you click **Next,** a message box appears prompting to Map field names automatically.

- Click **Yes** to map the field tags automatically.

- Click **No** to map the tags manually.

Figure 9: Map form fields

This window displays three columns.

- **Form Fields:** Displays the form tags available in the web form.

- **Application Fields:** Displays the field names that are mapped to the web form tags.

- **Values:** Displays the values from the web form data that you have pasted in Step 2.

> To map a field manually, click the option **Click here to map…** under **Application Fields**.

- Click **Edit Form Fields** and select the tag to modify the tags according to your requirements. Example:

  To change the tag name **Jobtitle** to **Designation,**

  - Click **Edit Form Fields.**

  - Select the **Jobtitle** field and enter **Designation**.

  - Click **Finish Edit Form Fields** to save the changes.

  - The tag Jobtitle is now displayed as **Designation**.

- Click **Map Automatically** to map the web form tags automatically to your destination application.

- Click **Clear Mapping** to remove the entire mapping.

- To remove the mapping for a single tag, click the relevant field under **Application Field Names** and select **Ignore map.**

> You can also access the Setup Form Fields wizard from the toolbar. Right –click the ACT! Icon in the AddressGrabber toolbar. Use the **Test Mapping** option to test the mapped values.

Click **Finish.** If duplicate tags are detected in the form, a message appears prompting whether to remove the duplicate tags. Click **Yes** to remove the duplicate tags.

Map Tags Manually for all applications

Step 1: Select form fields extraction method.

- Select **Manual Mode** under **Form Field Entry**. (Refer Figure 6).

Step 2: Enter form fields

- Enter your web form tags (field names) in the left pane along with the separator. You can enter multiple field names.
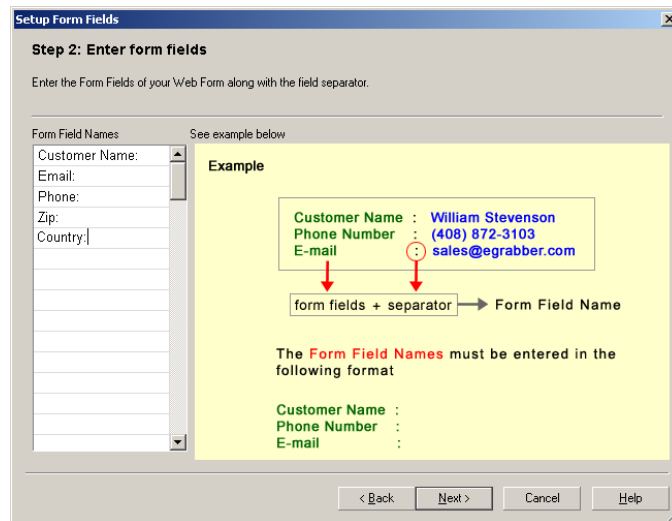
Figure 10: Enter form fields

- Click **Next.**

Step 3: Map field names in form to Application

- You can map the fields either manually or automatically.

On the left is *the Field Name On Form* that shows all the tags of your web form. On the right, you can map to destination application fields.
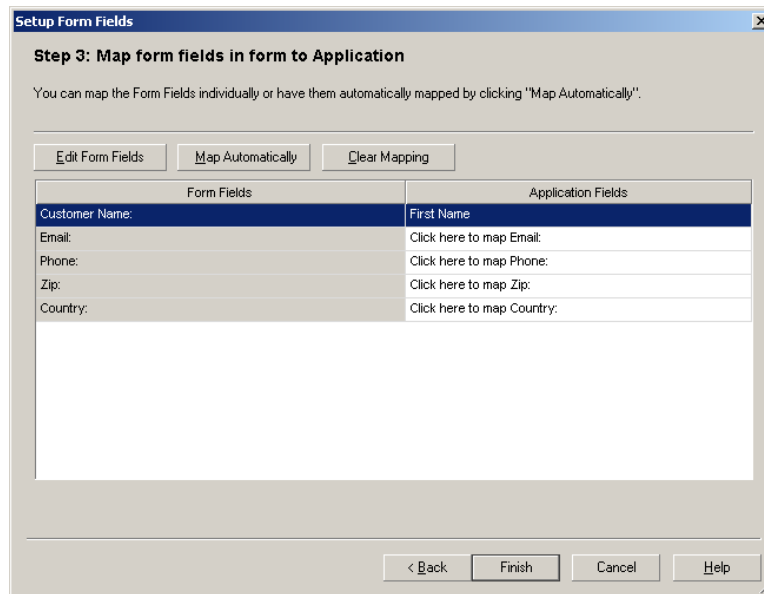
Figure 11: Map field names in form to Application

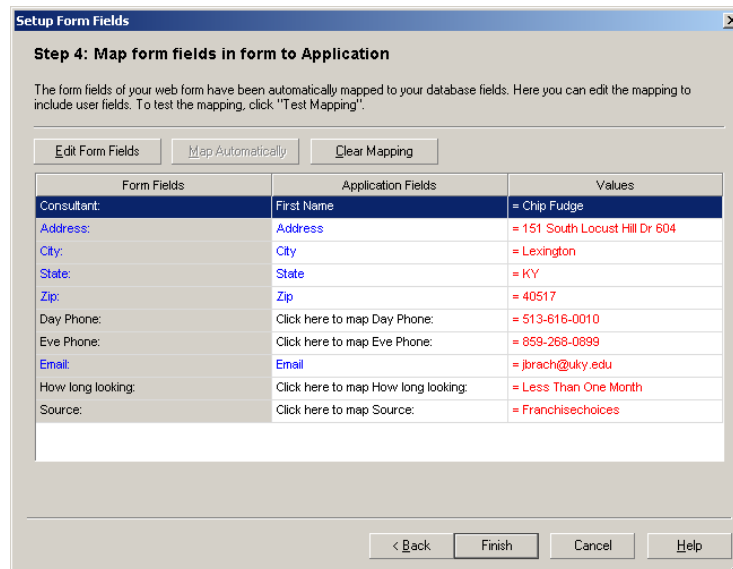This window displays two columns.

- **Form Fields:** Displays the form tags available in the web form.

- **Application Fields:** Displays the field names that are mapped to the web form tags.

- Click **Map Automatically** to map web form tags automatically to your destination application.

> To map a field manually, click the option **Click here to map…** under **Application Fields**.

- Click **Edit Form Fields** and select the tag to modify the tags according to your requirements.
  Example:

  To change the tag name **Jobtitle** to **Designation,**

  - Click **Edit Form Fields.**

  - Select the **Jobtitle** field and enter **Designation**.

  - Click **Finish Edit Form Fields** to save the changes.

  - The tag Jobtitle is now displayed as **Designation**.

- Click **Map Automatically** to map the web form tags automatically to your destination application.

- Click **Clear Mapping** to remove the entire mapping.

- To remove the mapping for a single tag, click the relevant field under **Application Field Names** and select **Ignore map.**

> You can also access the Setup Form Fields wizard from the toolbar. Right–click the ACT! Icon in the AddressGrabber toolbar. It also has **Test Mapping** option, which helps to test the mapped values to your applications.

Click **Finish.** If duplicate tags are detected in the form, a message appears prompting whether to remove the duplicate tags. Click **Yes** to remove the duplicate tags.

Preview, Edit and add default values to form tags

Step 1: Select form fields extraction method

- Select Preview/Edit Existing (Refer Figure 6).

Step 2: Preview / Edit field names and set default values

- The field names common to all applications are displayed under **FieldNames.**

- Select the field name to be edited and the possible form field names are displayed under **Edit form field names:**

- Example: The field name **Last Name** can be mapped to the following form field names.

  - Last Name

  - Last

  - Lastname

- You can edit the form field names. You can also add other possible field names to this list. Example: Last-Name.
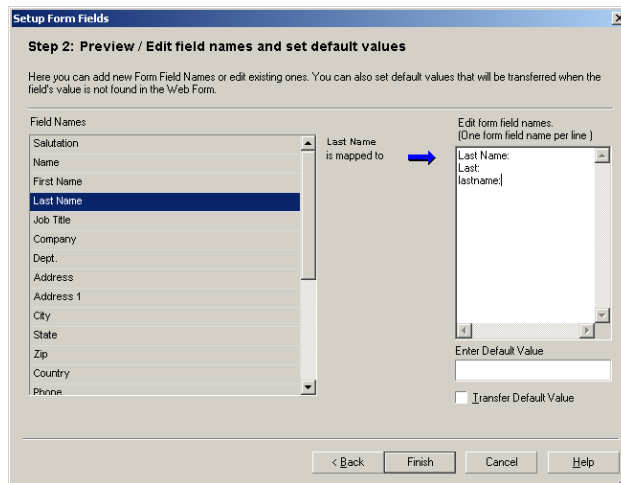
Figure 12: Preview/ Edit field names and set default values

- **Enter Default Value:** Enter the default value to be assigned to the selected field.

- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish.**

Adding Form Tags and assign default values to the User Fields

Apart from the standard address fields, you can add form tags and assign default values to the user fields of applications such as ACT!.

> You can add a maximum of 15 user fields to ACT!

- Right-click the corresponding destination icon in the toolbar and select **Link Options**.

- In the **Link Options** window, click the **Transfer In** tab

- Click **Add Form Tags**.

The **Setup Form Fields** for the selected application appears.
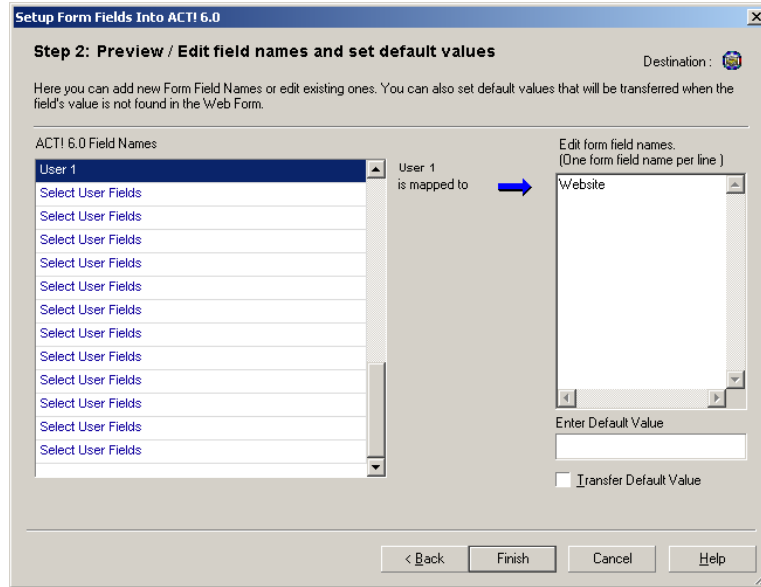
Figure 13: Setup form fields for user fields – for ACT!

- Under Field names, click and select the user field name. Enter the corresponding form tag under **Edit form field names.**

- **Enter Default Value:** Enter the default value to be assigned to the selected field.

- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish.**

2.5.2. Use - Text Removal

You can remove unwanted characters and text from the web Form.

- Click **Text Removal** to open Text Removal dialog box.

- Enter the text you want to remove.

- Click **OK**.

Figure 14: Text Removal

If your web form contains text "INC", enter the text in the Text Removal dialog box. When you transfer addresses to your destination application the text "INC" is ignored.

Make case sensitive: Select this option to make the search case sensitive. Text that exactly matches the case alone is ignored.

2.5.3. Use - Add Keywords

You can remove the misinterpreted details while capturing information from web forms.

The Setup Form Fields Wizard guides you to map tags automatically or manually for your web forms.

In exceptional cases, the contact details may be misinterpreted.

To process the addresses accurately, Click **Add Keywords.**

In the **Add Keywords Settings** dialog box that appears, select a field in the left pane and type a keyword for a particular field. You can also enter multiple keywords for identification.

Mr. Lawrence Reeves, RAC
8675 N.L. 98 Terrace
Miami FL 33016
305-826-7777
lreeves@worldnet.att.net

In this case, 'Lawrence Reeves RAC' is identified entirely as "Last Name, First Name" in AddressGrabber, whereas 'RAC' is the designation.

Using **Add Keywords**, you can map the value 'RAC' to the Title field in your destination application.

In the **Add Keywords Settings** dialog box, select the field **Title,** and enter **RAC** in the right pane.
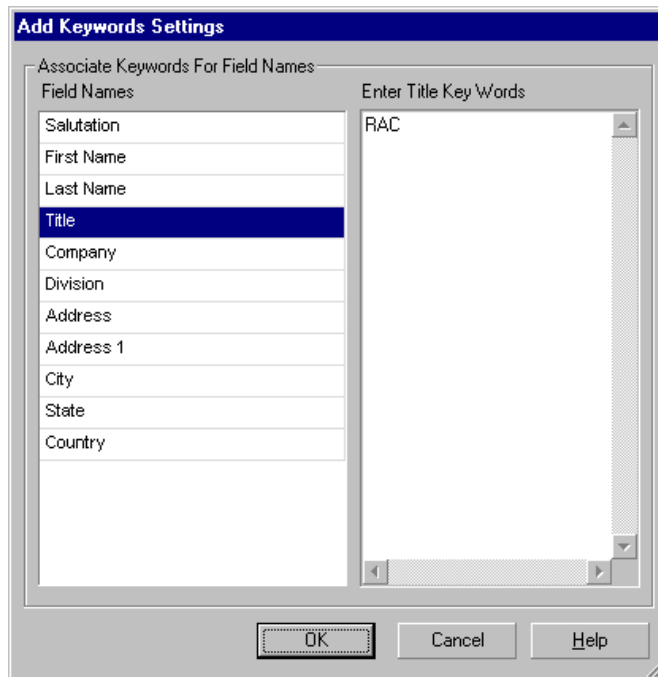
Figure 15: Add Keywords Settings

Click **OK**.

Now the value 'Lawrence Reeves' is transferred to the **Name** field of your destination and 'RAC' to the **Title** field.

2.5.4. Remove E-mail Header Before Extraction

Select this option to remove the email header information like Date, time, Sender address, etc. that appears in a web form.

2.6. Format Options

You can setup to change the format of the contact information before transferring to your destination.

Click **Format** to setup to format the following options:

2.6.1. Format Contact Fields

In the **Contact** tab, all the contact fields are displayed.
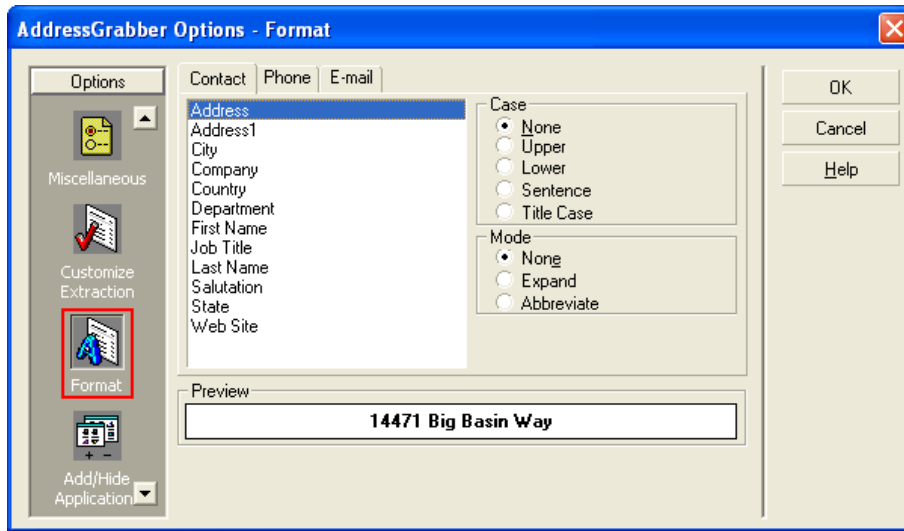
Figure 16: Format Contact Fields

Select any field to format. *Example*: Company.

Under **Case**, select a format to change the case of the text. Assume that the value for Company is eGrabber Inc. The text is formatted as shown in the table.

Case	Output
None	eGrabber Inc. (Value is not formatted)
Upper	EGRABBER INC.
Lower	egrabber inc.
Sentence	Egrabber inc.
Upper/Lower	Egrabber Inc. (Title case)

Note: You can select multiple fields by pressing **Shift + Down arrow** and select a format. The selected format is applied for all the selected fields. The option **None** is selected by default

Under **Mode**, select a format to display the text in expanded or abbreviated mode. Assume that the value for Company is eGrabber Inc.

The text is formatted as shown in the table:

Mode	Output
None	eGrabber Inc. (Value is not changed)
Expand	EGRABBER INCORPORATE (value is expanded)
Abbreviate	EGRABBER INC. (Value is abbreviated)

Click **OK** to save settings.

2.6.2. Format Phone field

Click the **Phone** tab

Select a field to format. **Example** – Fax

Select a format for the field under the **Phone/Fax Format.**

A preview of the selected format is displayed under **Preview**.

Click **OK**.
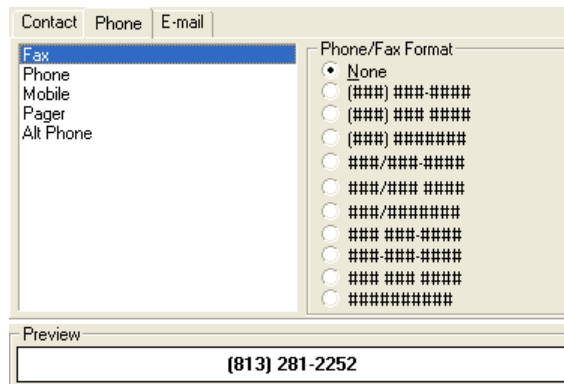
Figure 17: Format Phone field

2.6.3. Format E-mail field

Click the **E-mail** tab

You can setup format option for two e-mail fields. Select a field under the E-mail Tab. *Example*: **E-mail.**

Select a format for the e-mail field under the E-mail Format
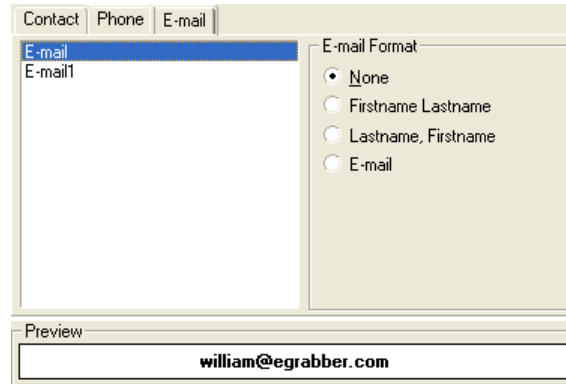
Figure 18: Format Email field

None: This option is selected by default. Select this option to transfer the value as it appears in the selected contact information.

First Name Last Name: Assign the Contact's First Name and Last Name along with e-mail address.
*Example***:** If the first name is "William" and last name is "Stevenson" then the e-mail address is assigned as "William Stevenson <william@egrabber.com>".

Last Name, First Name: Assign the Contact's Last Name and First Name along with e-mail address.
Example: If the transferred name is "William Stevenson" then the e-mail address is assigned as "Stevenson William <william@egrabber.com>".

E-mail: Transfers only the e-mail ID to your destination. *Example*: **<**<william@egrabber.com>**>.**

Click **OK.** The contact information is transferred to your destination in the formatted mode.

2.7. Add / Hide Applications

At the time of installation, AddressGrabber automatically detects the applications available in your System and displays them in the AddressGrabber Toolbar.

You can use the **Add / Hide Applications** window to detect the applications after the installation of AddressGrabber. You can also add or hide the application icons displayed in the toolbar.

Figure 19: Add/ Hide Applications

Click **<<Automatically Add/Hide Applications>>** to automatically detect the applications installed in your system.

To add an application icon to the toolbar, select the application under **Available Applications** and click **Add>>.**

To remove an application icon from the toolbar, select the application under **Selected Applications** and click **<<Remove**.

Click **OK** to save the settings.

2.8. My Address – Save your personal details

Click **My Address** to save your personal details. This option already contains the information you have entered during installation. You can use this information as return address for correspondence.

You can edit the details and add more addresses in the **My Address** window.

You can select **My Address** as Source in the AddressGrabber toolbar and transfer the addresses to any destination.

- Click **New** to create a new address.

- Enter the details.

- Click **Save** to save the details.

- Click **Delete** to remove an address.
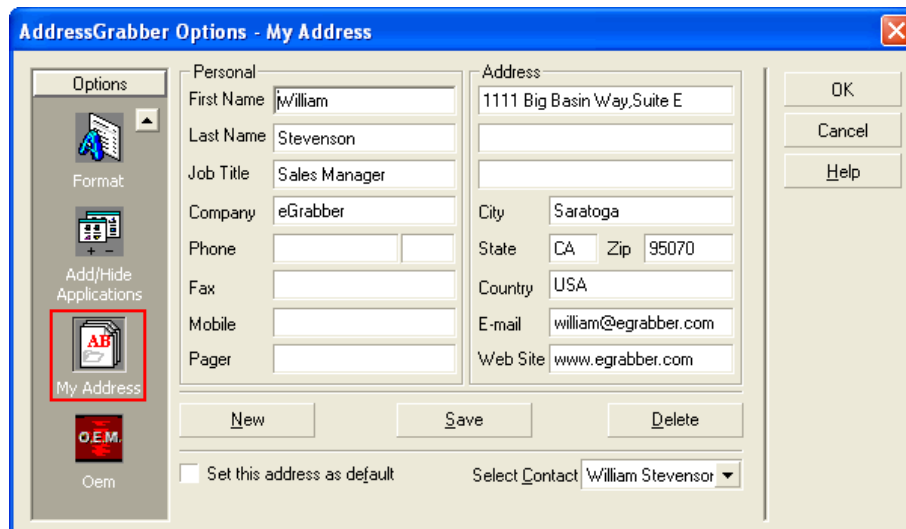
Figure 20: My Address

You can select a contact from the **Select Contact** list to view the corresponding details.

Select **Set this address as default** to make the currently selected address as default while transferring to destination applications.

3. AddressGrabber Parse Result Window

When you transfer contact information, the AddressGrabber Parse Result Window appears displaying the extracted contact details from the source text. You can verify and edit the extracted information and then transfer the data to your destination. The AddressGrabber Parse Result Window contains the following tabs:

Figure 21: AddressGrabber Parse Results window

Contact tab

This tab appears by default and displays the extracted contact information. You can edit this information. In the bottom of the window, the captured text is displayed.

♦ **Verify Address:** Click here to verify the address details with the USPS website. When a matching record is found, the official Postal address format is displayed.

Figure 22: Address Verification - Result

Click **Yes** to replace the captured address with official postal address. Select **Apply USPS Format (UPPER CASE)** to replace the address in Upper Case.

> The USPS address format is normally displayed in Upper Case. If you want to transfer addresses in the original format or in the format you have setup in the **Format Options**, then clear this option.

♦ **Use Form Fields:** When you transfer address from a web form, select this option to transfer the mapped web form tags to the corresponding fields in your destination application. Click here for more details on mapping web form tags to destination fields.

♦ **Use Format Options:** Select/clear this option to apply/not apply the format you have setup.

♦ **Settings:** Click here to modify the default settings. When you click here, a menu appears with the following options:

  ▪ **Options:** Opens AddressGrabber Options window. Refer Chapter 2 for more details on Options.

  ▪ **Link Options:** Opens the Link Options window for the selected destination application. You can customize the transfer options according to the selected application.

  ▪ **Hide / Show Processes Page:** To remove or display the Processes tab.

  ▪ **Hide / Show Activities Page:** To remove or display the Activities tab.

  ▪ **Hide / Show Format Page:** To remove or display the Format tab.

  ▪ **Display parse result window:** To show / hide the Address Parse Result window.

♦ **Transfer**: Click this option to transfer the contact information to your destination.

♦ **Cancel**: Click this option to close the window without transferring the information.

♦ **Parse Again:** Click here to capture the information again. You can use this option when you have any changes in the Address Confirmation Window, and you want to revert to the original information.

User Fields tab

Displays default values of user fields you have entered for ACT! and Outlook.

Refer to Adding default values to the user fields for more details.

Activities tab

Displays Activities attached to the contact while transferring to ACT!. You can add, edit or delete the activities in this tab.

Format tab

Click this tab to format the values of the Contact and Email fields in the address. The same options are also available in the Format Options window. You can setup to format all the addresses being transferred by using the **Format Options**. If you want to change the format for a specific address, use the **Format** tab in the **Confirmation** Window.

> The Contact tab and the Format tab are displayed for all the applications. The other tabs are displayed or hidden according to the selected destination application. User Fields tab: Displayed for ACT! and Outlook. Activities tab: Displayed for ACT! and Outlook.

4. Check for Duplicates

You can check for duplicate information while transferring to database applications like ACT! and Outlook.

Right click the destination icon in the toolbar and select **Link Options**.

In the **Link Options** window, click the **Transfer Setup** or the **Duplicate Check** tab.
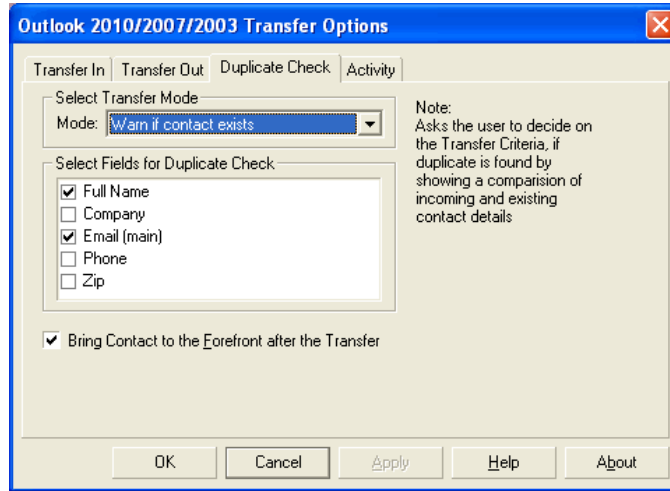
Figure 23: Check for duplicates – Outlook

Under **Select Transfer Mode**,

(a) Select **Always add as new Contact** to add the duplicate as a new contact to your database.

Example:

Incoming Candidate Address	Existing Address	Transfer Mechanism
William Stevenson 14471, Big Basin Way, Saratoga, CA 95070, USA	William Stevenson 14471, Big Basin Way, Saratoga, CA 95070, USA	A new contact "William Stevenson" is created.

(b) Select **Update if contact exists** to update an existing contact in your database.

Example:

Incoming Candidate Address	Existing Candidate Address	Transfer Mechanism
William Stevenson 14470, Big Basin Way, Saratoga, CA 95070, USA	William Stevenson 14471, Big Basin Way, Saratoga, CA 95071, USA	The existing contact is updated with the incoming contact.

(c) Select **Warn if contact exists** to get a warning message when you transfer a duplicate contact to your database. During the transfer of a duplicate contact, a **Contact Linker** dialog box appears with the following options:

Figure 24: Contact Linker - Outlook

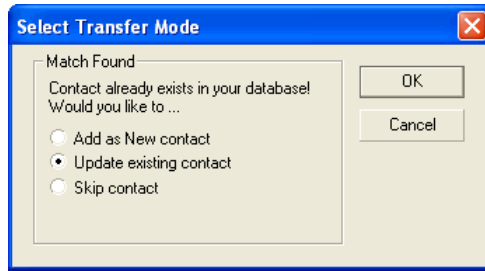| Select	To do…
Add as New contact	Adds the duplicate record as a new record in your database.
Update existing contact	Updates an existing record with the new incoming details in your database.
Skip contact	Cancel transferring the duplicate record to your database.

If more than one contact exists in the database that matches the incoming record, then the Update option is disabled in the above dialog box. In this case, you can select to add the duplicate record as a new record or cancel transferring the record to your database.

(d) Select **Cancel if contact exists** to cancel transferring the duplicate contact to your database.

When you select any of the above options except **Always add as new contact,** the fields under **Select Fields for Duplicate Check** are made available. Select a single field or multiple fields to check for duplicate values.

The values of the selected fields are checked while transfer and if the data is already found in the destination application, then the duplicate record is handled according to the selected transfer mode.

Example for Duplicate Check: Set the Option "Warn if Contact Exists " and select the fields "Name" & "E-mail".		
Incoming Address	**Existing Address**	**Transfer Mechanism**
William Stevenson 14471, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	William Stevenson 14471, Big Basin Way, Saratoga, CA USA 95070 Support@egrabber.com	Although name of the incoming contact matches the existing contact, the email is different. Therefore, a new contact is created in your database.
Robin Williams 14471, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	Robin Williams 14871, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	In this case, the name and e-mail of the existing contact match the incoming contact. A **Contact Linker** dialog box appears displaying different options. You can select to update the existing contact or add it as a new contact or cancel transferring the duplicate contact to your database.

▪ **Bring Contact to the forefront after the transfer:** Select this option to view the transferred Contact.

Click **OK**.

The tab to check for duplicates appears as either **Transfer Setup** or **Duplicate Check,** according to the selected destination application.

5. Transfer using Contact Managers

You can transfer addresses using the Contact Managers like ACT! and Outlook. You can also setup the transfer options according to your requirements.

5.1. ACT!

You can transfer contact information using the following versions of ACT!.

- ACT! 2021 / 2020 / 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011

You can use ACT! as both source and destination.

5.1.1. Setup Transfer Options for ACT!

You can setup the following transfer options for ACT! using the **Link Options**.

- Setup to transfer from or to different address sections, i.e., Home /Business / Both.
- Setup Form tags while transferring from web forms.
- Check for Duplicates.
- Schedule Activities for transferred contact.
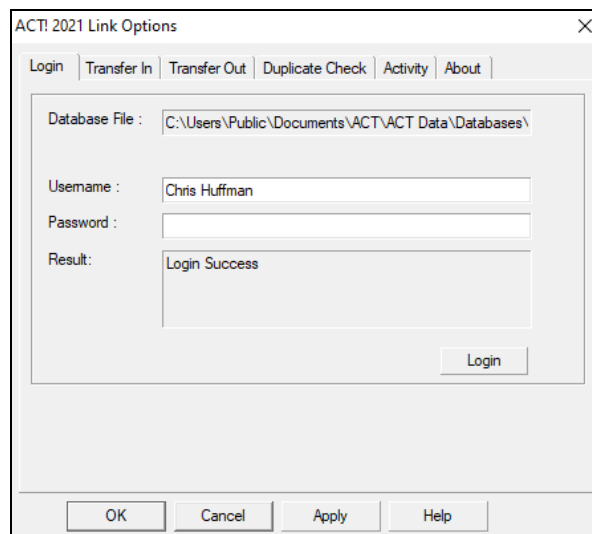
Right click the ACT! Icon in the toolbar and select **Link Options** to setup ACT!

If the ACT! Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Login

When you select ACT! 2021 / 2020 / 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 as destination, you need to login to the database to ensure accurate transfer of data.

- In the **Link Options** window, click the **Login** tab.

Figure 25: Login to ACT!

- Enter ACT! database login details.

  - **Database Path:** Name and path of the currently opened database is displayed.

  - **User Name***:* Enter the login name of your ACT! database.

  - **Password***:* Enter the ACT! database password.

- Click **Login**.

- The message **Login Successful** is displayed.

- Click **Apply**.

> In ACT! 2021 / 2020 / 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011, Transfer of addresses is not possible in the following cases:
>
> ♦ If the security level for the user in ACT! 2021 / 2020 / 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 has been set as Browse.
>
> ♦ If the login access for the user has been set as Inactive.
>
> ♦ If the user has upgraded from previous version of ACT! and not converted the database from previous version to latest version of ACT!.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.
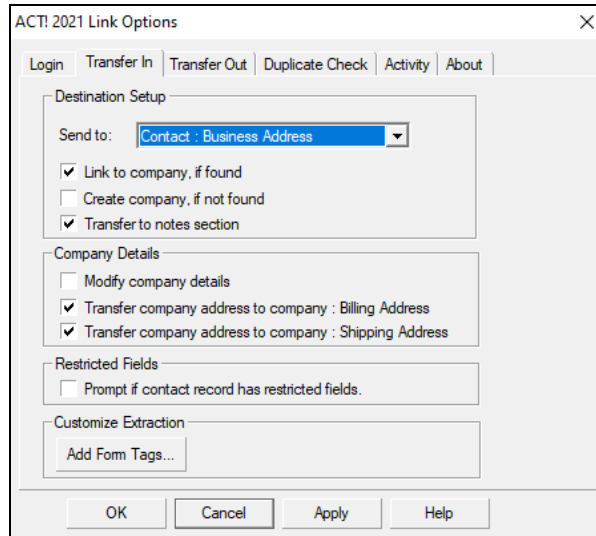
Figure 26: Setup Transfer In - ACT!

Under Destination Setup:

- From the **Send To:** list select,

  - **Contact: Business Address** to add the contact information as the contact's primary address. This option is selected by default.

  - **Contact: Home Address** to transfer the contact information in the 'Home Address' tab of ACT contact record.

  - **Contact: Business and Home Address** to transfer the contact information to both the primary address and the 'Home Address' section of ACT!.

**The following options are available in addition for ACT!
2021/2020/2019/2018/2017/2016/2015/2014/2013/2012/2011.**

- Select **Link to Company, if found** option if you want the contact record to be linked to existing company in ACT!

- Select **Create Company, if not found** to create a new company record in ACT! and link the contact information that is being transferred to that company.

- Select **Transfer to Notes section** to add the contact record in the 'Notes' of ACT!.

Under Company Details:

- Select **Modify Company Details** to update the existing company record in ACT! with the new record being transferred.

- Select **Transfer Company Address to Company: Billing Address** and / or **Transfer Company Address to Company: Shipping Address** if you want the address to be transferred to the appropriate sections in the 'Address' tab of ACT! company record.

Under Customize Extraction,:

- Click **Add Form Tags…** to map the form tags while transferring data from a web form.

Refer to Chapter 2.5 for more details on mapping web form tags.

**The following option is available in addition for ACT!
2021/2020/2019/2018/2017/2016/2015/2014/2013/2012/2011.**

- Select **Prompt if contact record has restricted fields** to get a warning message if ACT! 2021/2020/2019/2018/2017/2016/2015 / 2014 / 2013 / 2012/2011 database contains any user-restricted fields.

  - In the warning message that appears, click **Yes** to transfer the record. The information is transferred to all the fields except the restricted fields. The restricted fields are left blank for the transferred record.

  - Click **No** to cancel the transfer of record.

Click **OK** to save the settings.

Setup to Transfer Out

In the **Link Options** window, click the **Transfer Out** tab.
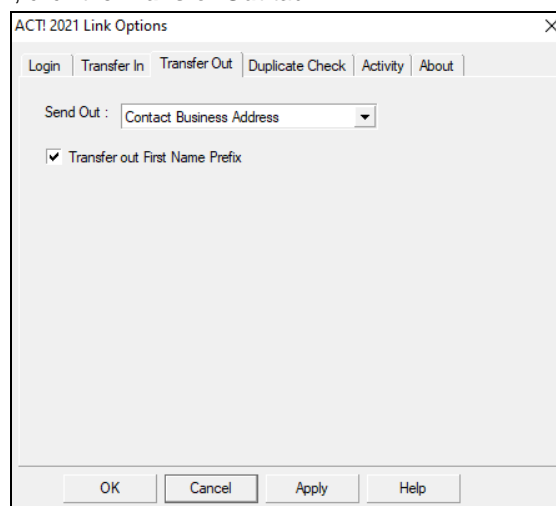
Figure 27: Setup Transfer Out - ACT!

- From the **Send To:** list select,

  - **Contact: Business Address** to transfer contact information from the Business Section. This option is selected by default.

  - **Contact: Home Address** to transfer the contact information from the Home Section.

- **Transfer out First Name Prefix:** Select this option to transfer the details in the salutation field.

Setup to check for duplicates

In the **Link Options** window, click the **Duplicate Check** tab.

Select the Transfer Mode and the fields to be checked for duplicates.
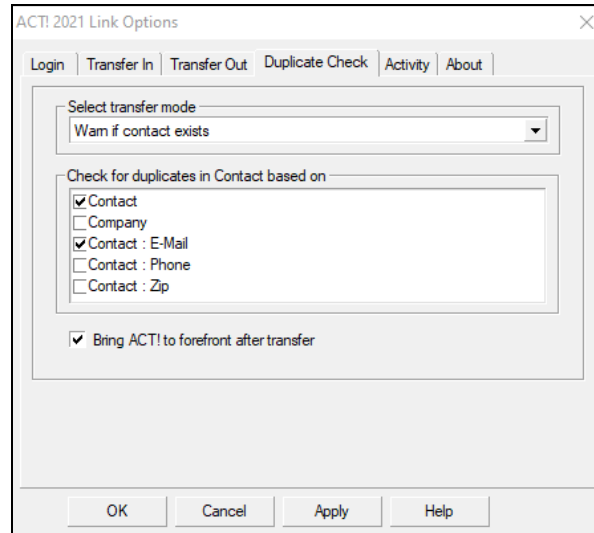
Figure 28: Setup Duplicate Check - ACT!

Refer to Chapter 4 for more details about the Duplicate Check.

Setup to Schedule Activity

You can attach, schedule and prioritize activities like "Calls, Meetings, Appointments" for the contacts transferred to ACT!. The activity created and scheduled for the transferred contact is displayed in the Activity tab of the contact in ACT!. You can attach activities for a single or multiple contact(s).

In the **Link Options** window, click the **Activity** tab.
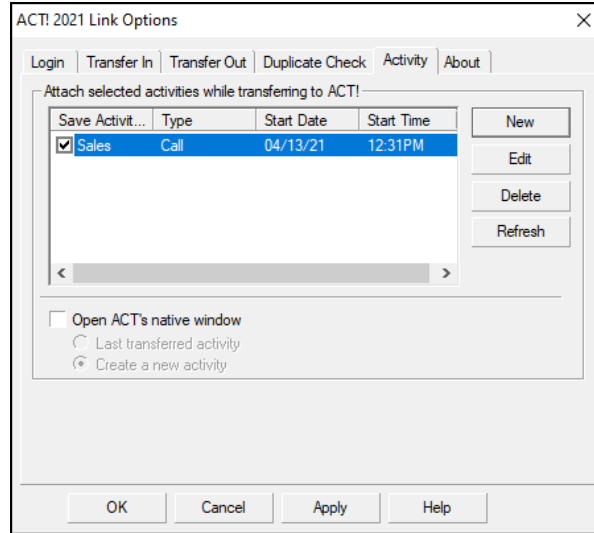
Figure 29: Activity Setup - ACT!

To create a new activity:

Click **New.** In the **Activity Settings** window, enter the following settings:
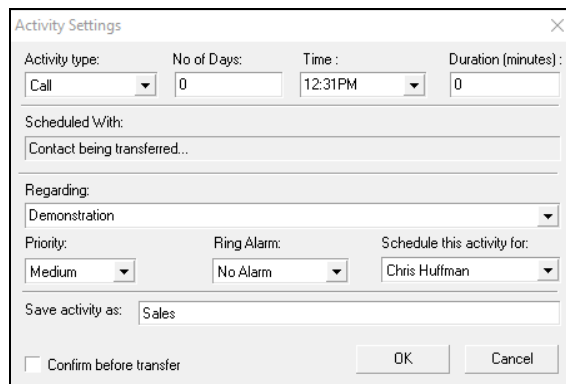
Figure 30: Create a New Activity in ACT!

Activity type: Select an activity "Call", "Meeting", or "To-do" from the list.

No of Days: Enter the number of days counting from the present day when you want to perform the activity. For Example, if you type 5 days then it executes the activity on the 5th day counting from the present day.

Time: Enter the time to perform the activity. The current system time is displayed by default. Enter a time or click the arrow to select time. The **Time** selector shows the time slots with a difference of 30 minutes.

Duration: Enter the time duration you want the activity to last. For Example, if your calls last for 30 minutes, then type 30 in the Duration box.

Scheduled With: The name of the contact to which you have attached and scheduled the activity is displayed when you transfer records to ACT!.

Regarding: Select a description for the activity from this list.

Priority: Select **High**, **Medium** or **Low** from the list to prioritize your activity.

Ring alarm: Set an alarm to remind you of a scheduled activity. Select a time from the list. For Example: If you select 30 minutes from this list, the alarm displays an alert message 30 minutes before the time at which the activity has been scheduled.

Save activity as: Enter a name to save the activity.

Confirm before transfer: Select this option to view the scheduled activity when the contact information is transferred to ACT!

Schedule this activity for: This option is available for ACT! 2021/2020/2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 only. The existing database user names are displayed in this drop-down list. You can select the user name from this list. The activity is attached to the selected user name.

Click **OK** to save the settings.

> The name of the activity is displayed under **Attach selected activities while transferring to ACT!**. You can create more activities by repeating the above steps. You can **select/clear** the activity names to activate/deactivate the process during transfer of addresses.

To edit an activity:

- Select the activity displayed under Attach selected activities while transferring to ACT!

- Click **Edit** and make changes in the Activity Settings.

- Click **OK.**

To delete an activity:

- Select the activity displayed Attach selected activities while transferring to ACT!

- Click **Delete**.

- Click **OK**.

Click **Refresh** to reflect any changes made in activity schedule.

Open ACT's native window: Select this option to display **Schedule Activity** window when the information is transferred to ACT!

- **Last transferred activity:** Select this option to view **Schedule Activity** window with the activity you have setup in the Activity tab. You can modify the settings before transferring to the application.

- **Create a new activity:** Select this option to schedule a new activity in the **Schedule Activity** window.

Click **OK** to save the settings.

> You can schedule activities in the same method for ACT! 2006

5.1.2. Transfer from ACT!

You can transfer contacts from ACT! and the e-mail client to any destination application.

- Open ACT! and select the contact record to be transferred.

- Ensure that ACT! icon is selected as Source in the AddressGrabber toolbar

- Click the destination icon in the toolbar to which the address should be transferred.

- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The contact is transferred to the selected destination application.

> If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

5.1.3. Transfer into ACT!

You can transfer the contact as:

- New individual contact

- New company contact

To transfer the contact:

- Highlight the contact information to be transferred.

- Click the ACT! Icon in the AddressGrabber toolbar.

- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The Contact is transferred into ACT! into the Business / Home / Both the sections according to the option you have setup in the **Transfer** In tab.

> Ensure that ACT! is open.

5.2. Outlook

You can transfer addresses using the following versions of Outlook.

- Outlook 2019/2016/2013/2010/2007/2003

You can use Outlook as both source and destination.

5.2.1. Setup Transfer Options for Outlook

You can setup the following transfer options for Outlook using the **Link Options**.

- Setup to transfer from or to different address sections, i.e., Home /Business / Both.

- Setup Form tags while transferring from web forms.

- Check for Duplicates.

- Schedule Activities for transferred contact.

  Right click the Outlook Icon in the toolbar and select **Link Options** to setup Outlook.

> If the Outlook Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Transfer In

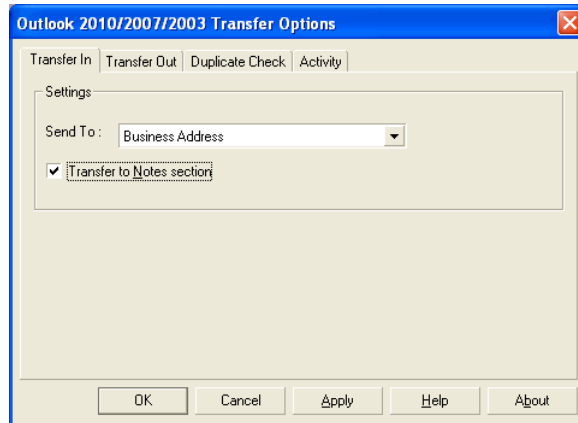In the **Link Options** window, click the **Transfer In** tab.

Figure 31: Outlook - Transfer In Setup

Under Settings:

- From the **Send To:** list select,

    ♦ **Business Address** to transfer the contact information as the primary address. This option is selected by default.

    ♦ **Home Address** to transfer the contact information in the 'Home Address' tab

    ♦ **Both Addresses** to transfer the contact information to both the primary address and the 'Home Address' section.

- **Transfer to Notes section:** Select this option to add the contact record to the '**Notes'** section.

Under Customize Extraction,:

- Click **Add Form Tags…** to map the form tags while transferring data from a web form.

Refer to Chapter 2.5 for more details on mapping web form tags.

Click **OK** to save the settings.

Setup to Transfer Out

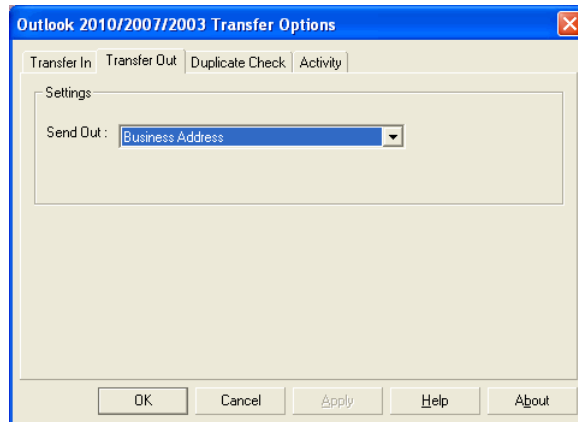In the **Link Options** window, click the **Transfer Out** tab.

Figure 32: Outlook – Transfer Out Setup

- From the **Send Out:** list select,

- ◆ **Business Address** to transfer contact information from the Business Section. This option is selected by default.

- ◆ **Home Address** to transfer the contact information from the Home Section.

▪ Click **OK.**

Setup to check for duplicates

In the **Link Options** window, click the **Duplicate Check** tab.

Select the Transfer Mode and the fields to be checked for duplicates.

Refer to Chapter 4 for more details about the Duplicate Check.

Setup to Schedule Activity

You can attach, schedule and prioritize activities like " Appointments, Task, Journal" for the contacts transferred to Outlook. The activity created and scheduled for the transferred contact is displayed in the Activity tab of the contact in Outlook.

In the **Link Options** window, click the **Activity** tab.
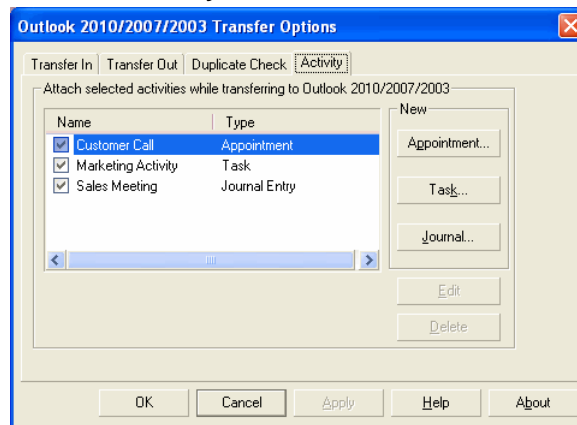

Figure 33: Schedule Activity - Outlook

Schedule Appointments, Journals and Tasks

You can attach and schedule Appointments, Tasks, and Journal Entries for the contacts transferred to your application. The activity created and scheduled for the transferred contact is displayed in the **Activity** tab of the contact in Outlook.

Click the **Appointment, Task,** or the **Journal** buttons to create new activities.

The name of the activity is displayed under **Attach selected activities while transferring to Outlook 2019/2016/2013/2010/2007/2003.** You can create more activities by repeating the above steps. You can select/clear the activity names to activate/deactivate the process during transfer of addresses.

As you transfer records to Outlook, this activity is attached and is scheduled displaying the name of the transferred contact under Contacts.

To edit an activity:

▪ Select the activity displayed under **Attach selected activities while transferring to Outlook 2019/2016/2013/2010/2007/2003.**

▪ Click **Edit** and make changes in the Settings.

▪ Click **OK.**

To delete an activity:

- Select the activity.

- Click **Delete.**

- Click **OK.**

5.2.2. Transfer from Outlook

You can transfer contacts from Outlook Address Book or from Outlook email into any destination application.

- Open Outlook Address Book or email and select the contact record to be transferred.

- Ensure that Outlook is selected as Source in the AddressGrabber toolbar

- Click the destination icon in the toolbar to which the address should be transferred.

- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The contact is transferred to the selected destination application.

> If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

5.2.3. Transfer into Outlook

To transfer the contact:

- Highlight the contact information to be transferred.

- Click the Outlook Icon in the AddressGrabber toolbar.

- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The Contact is transferred into Outlook Address Book.

> Ensure that Outlook is open.

6. Templates

You can create templates to transfer addresses using Clipboard.

6.1. Working with Templates

Templates are used to add, modify, or edit settings for the fields you transfer to Clipboard.

Right click the **Destination** Icon in the toolbar and select **Link Options**.

In the **Link Options** window of the selected application, Click **Edit.**

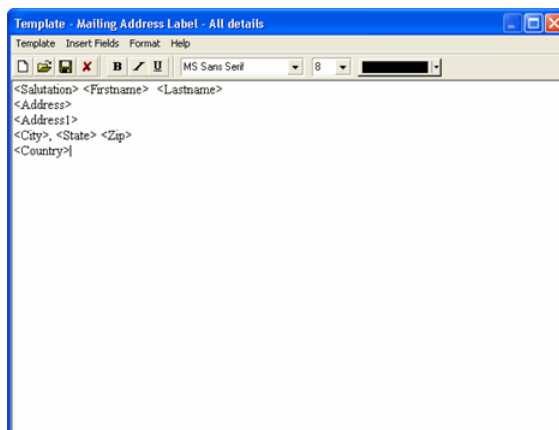You can create, edit, and delete templates here.

Figure 34: Template

Menu Options in Template

Template Menu

- **New:** Create a new template.

- **Open:** Open an existing template.

- **Delete:** Delete the template.

- **Save:** Save the template.

- **Save As:** Save the template in other name.

- **Exit:** Close the template window

Insert Fields menu

- <Firstname> <Lastname> <Jobtitle> <Department> <Company> <Address1> <Address2> <City> <State> <Zip> <Country> <E-mail> <E-mail2> <Phone1> <Ext1> <Phone2> <Ext2> <Fax> <Mobile> <Pager> <Web>

Select a field to be included in a new or existing template.

The selected field is automatically inserted in the template.

Format menu
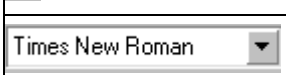
- **Word Wrap:** Automatically wraps the fields in the next line instead of a continuous lining of fields.

- **Font:** You can change the font, size of the fields.

Help menu

- **Help:** Displays Help Topics

- **About:** Displays Information about Version of Template.

Toolbar Options in Template

Click...	To do this...
☐	Create a new template.
📂	Open an existing template.
💾	Save the template.

✖	Delete a template
B	Format the text as Bold.
I	Format the text as Italics.
<u>U</u>	Underline the text.
Times New Roman ▼	Select the font
11 ▼	Select the font size
▬ ▼	Select the color for template.

Creating a New Template

- Click **Add** in the Template window.
- Enter a name in the **Enter Template Name:** box for the new template
- Enter the format and order of the fields in the **Enter Template Format:** window.
- Click **Save.**
- Click **OK** to close the Template window.

You can use only the following Fields in a Template.

Firstname
Lastname
Salutation
Job-Title
Department
Company
Address
Address1
City
State
Zip
Country
E-mail
E-mail1
Phone
Ext
Phone1
Ext1
Fax
Mobile
Pager
Web-Site

Figure 35: Template Fields supported

You can rearrange the order of fields.

You can create more number of templates by repeating the above steps.

7. Transfer using Microsoft Office Applications

You can transfer addresses using Microsoft Excel.

7.1. Microsoft Excel

You can transfer addresses using Excel 2019/2016/2013/2010/2007/2003.

You can use Excel as destination only.

7.1.1. Setup Transfer Options for Excel

You can setup to transfer into a new or existing Excel File.

Right click the **Excel** Icon in the toolbar and select **Link Options.**

> If the **Excel** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.
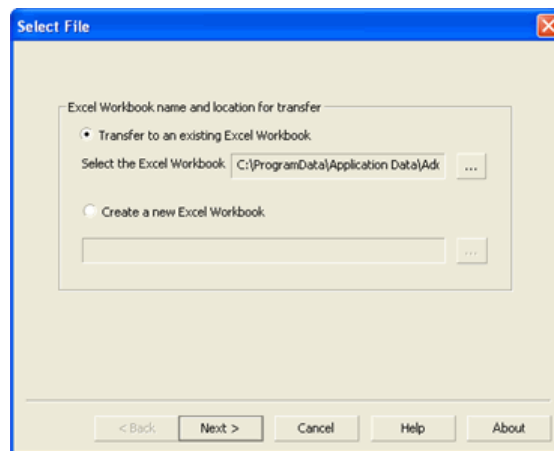
Figure 36: Excel – Select / Create a File

Setup to transfer to an existing Excel file

- **Transfer to an existing Excel Workbook:** Select this option to transfer addresses to an existing Excel file.

- **Select the Excel Workbook:** Click [...] next to this option to open an existing Excel file.

- Browse and locate your Excel file.

- Select the file and click **Open.**

- Click **Next** to Select Fields in the existing Excel File.

Select Fields in Excel

When you select an existing Excel file and click **Next,** the **Select Fields** dialog box appears where you can select the sheet and column headings.
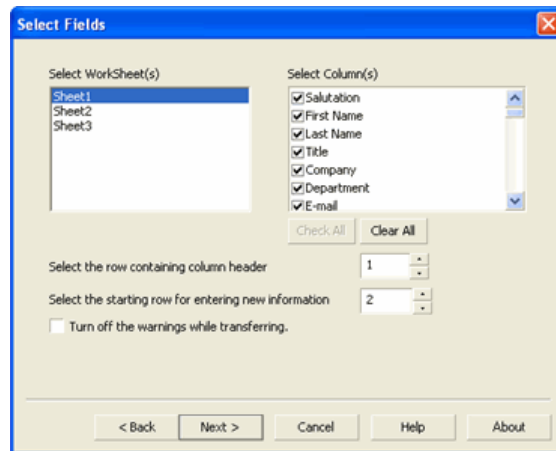
Figure 37: Excel - Select Fields

The left pane displays all the sheets in the file and the right pane displays the column headings available in the selected sheet.

From the left pane, select the sheet(s) to which you want to transfer your records. The first sheet is selected by default.

 The column headings present in the first row of the sheet are displayed by default in the right pane.

Select the fields to which you want to transfer the address details.

> 💡 You can select multiple sheets from your Excel File. Example: Select Sheet1 and select the fields of this sheet in the right panel. To select the next sheet click on Sheet2 and select fields from this sheet. When you select Sheet2, the already selected Sheet1 appears in blue color.

Select the row containing the column header: Select the row number that holds the column headings, if no fields are displayed under Select Column(s).

Select the starting row for entering new information: Select the row number from where you want to insert the transferred records.

> The values of the row numbers can be different for each sheet.
>
> Example: For Sheet1 row numbers can be 3,4 and for Sheet 2 the row numbers can be 2,3.

Check All: Click here to select all the column headings.

Clear: Click here to remove the selection of all the column headings.

Turn off the warnings while transferring: Select this option to hide the warning messages during transfer.

Click **Next.**

To continue with the next step refer to <u>Map Fields</u>.

Setup to transfer to a new Excel File

Create a new Excel Workbook: Select this option to transfer addresses to a new Excel file.

Click [...] next to this option.

Enter the name of your Excel file.

Click **Save**. A new Excel file is created with the specified name.

Click **Next** to Create Excel Fields.

7.1.2. Create Excel Fields

After creating a new Excel File, you have to create column headings. By default, three sheets of the new Excel file are displayed in the left pane.
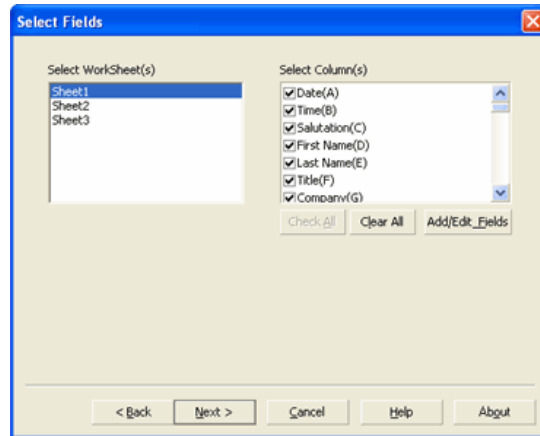
Figure 38: Create Excel Fields

Select a sheet from the list to which you want to transfer your records. The first sheet is selected by default.

Click **Add/Edit Fields** to create column headings for the selected sheet.

Enter your field names in the **Edit Fields** window. You can also edit the fields. Click **OK** to save.
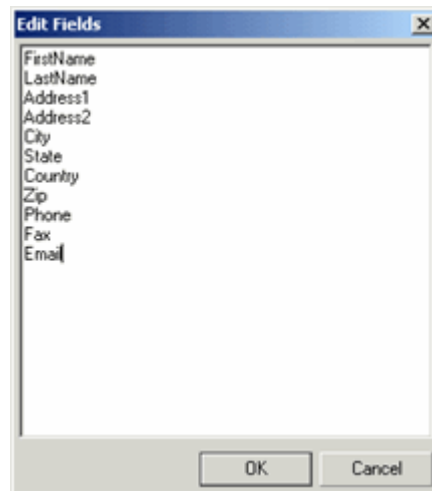
Figure 39: Add / Edit Excel Fields

The field names are displayed under **Fields**.

By default, all the column headings are selected. You can select/clear the fields.

Check All: Click here to select all the column headings.

Clear All: Click here to remove the selection of all the column headings.

Click **Next** to map the fields.

Map Excel Fields

After selecting the excel fields, you can map the fields of your Excel Sheet to the internal fields used by AddressGrabber.

> 💡 If you have provided the field names in the Excel file, the same as the internal fields used by AddressGrabber, then the contact field names are automatically mapped with the Excel column headers.
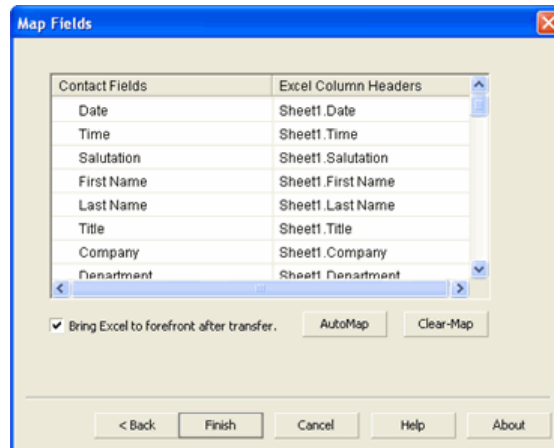
Figure 40: Map Excel Fields

Excel Column Headers: Select column heading that you want to map to the contact field.

Example: Map "Sheet1.City" field to "City".

Click **Auto-Map** to automatically map the fields.

Click **Clear-Map** to clear all the mappings.

Select **Bring Excel to forefront after transfer** to view the Excel Sheet with transferred contact.

Click **Finish** to save the settings.

7.1.3. Transfer into Excel

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Excel Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into Excel Work Book.

> 📝 Ensure that Excel Sheet is open.

8. Transfer into Online Web forms

You can transfer addresses into your Online Web forms using FormFill.

8.1. FormFill

You can map the web form tags to corresponding fields and transfer the addresses.

8.1.1. Setup Transfer Options for FormFill

You can map the form tags and assign default values to the fields in the web form.
Open your online Web form.

Figure 41: Online Web Form

Right click the **FormFill** Icon in the toolbar and select **Link Options.**

> If the **FormFill** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Map Form Tags

To transfer addresses to Online Web forms, map the tags from the fields available in your source application to the Online Web form tags.

You can map the tags automatically or manually.
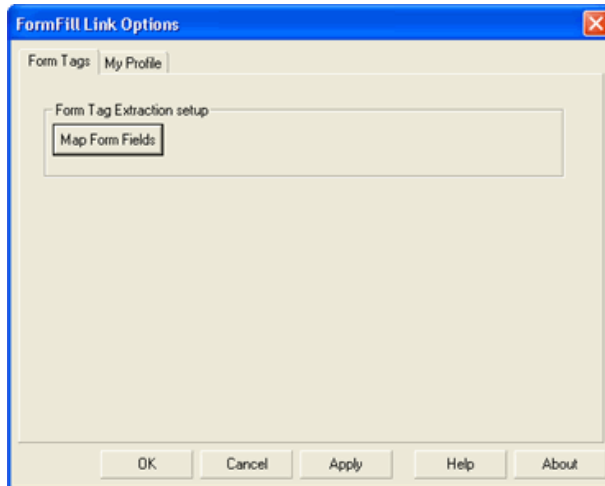
Figure 42: FormFill - Link Options

Map tags automatically

In the Link Options window, click **Map Form Fields**.

Step 1: Select form fields extraction method

Select **Automatically Extract** and click **Next.**
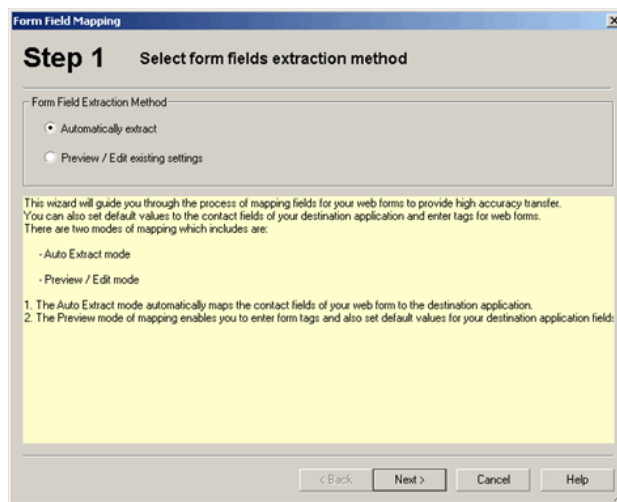
Figure 43: Map Tags Automatically

Step 2: Map field names in form to Application

The Online Web form tags are automatically mapped to the predefined tags of AddressGrabber.
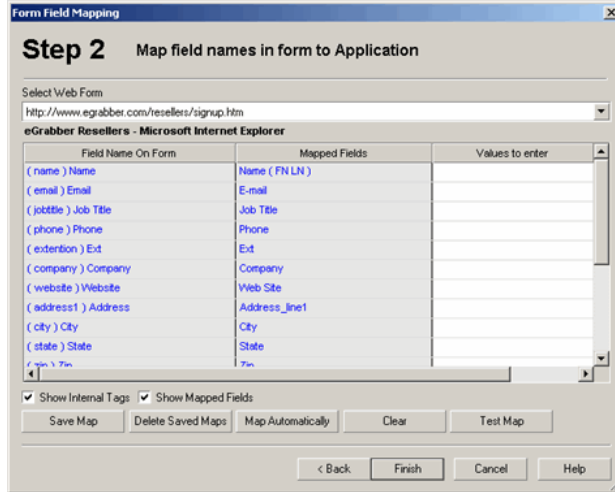
Figure 44: Map Field Names

▪ Under **Select Web Form**, the URL of currently active online form is displayed. Click the down arrow to view the list of URLs opened in multiple browsers. You can select another form from this list. The mapped fields are automatically updated according to the selected web form.

▪ **Field Name on Form:** Displays the tags of the currently active web form.

▪ **Mapped Fields:** Click to map the fields.

▪ **Values to enter:** Add values to be transferred.

▪ **Show Internal Tags**: Select to display the internally built-in tags in the web forms. By default, this option is selected.

▪ **Show Mapped Fields:** Select this option to view the mapping of web form fields to the pre-defined fields.

▪ **Save Map:** Click to save the mapping.

▪ **Delete Saved Maps:** Click to delete the entire mapping of the form.

▪ **Map Automatically:** Click to map the fields automatically.

▪ **Clear:** Click to clear the mapping.

▪ **Test Map:** Enter sample data under **Values to enter** and click here to test the transfer.

Click **Finish.**

Special Fields supported in Form Fill

Apart from the standard contact details, you can also map special fields to the web form tags. Click any field under **Mapped Fields** to select the special fields and map them to the web form fields.

AddressGrabber supports the following special fields:

Special Fields	Consist of:
Address Block	Address1, Address2, Address3, City, State, Zip and Country.

Mailing Address with Title	Salutation, First Name, Last Name, Job Title, Company, Address1, Address2, Address3, City, State, Zip and Country.
Mailing Address without Title	Salutation, First Name, Last Name, Company, Address1, Address2, Address3, City, State, Zip, Country.
Mailing Address (All Details)	Salutation, First Name, Last Name, Job Title, Company, Address1, Address2, Address3, City, State, Zip, Country, Phone, Fax, Mobile, Pager, E-mail id and Website.
All Details with Tags	Transfers all the fields with the tagged information to the selected web form field.

When you map a special field to a web form field, all the fields that are available in the special field are transferred to the selected web form field.

> You can also view the special fields in the **Form Info** tab of AddressGrabber Parse Results window during transfer.

Map tags manually

In the Link Options window, click **Map Form Fields**.

Step 1: Select form fields extraction method

Select **Preview/ Edit extract settings** and click **Next.**

Step 2: Map field names in form to Application

Select a tag in left pane and in the right pane type your web form tag or field.

You can enter a single tag per line. Press **Enter** and enter multiple tags for a pre-defined field to save web form mapping for various forms.
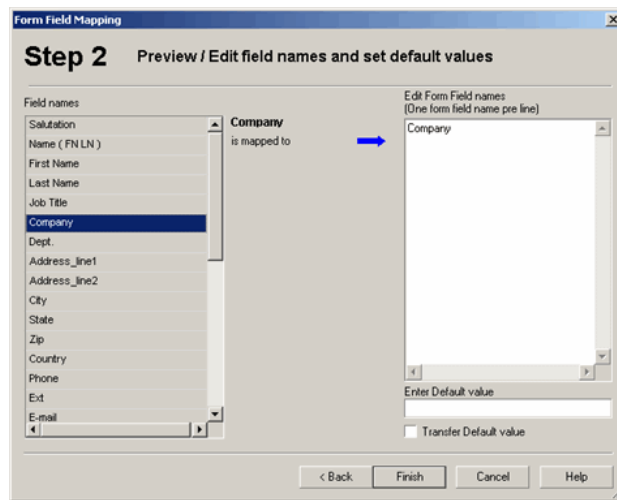
Figure 45: Preview/ Edit Tags

- **Enter Default Value:** Enter the default value to be assigned to the selected field.

- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish.**

8.1.2. Transfer addresses into Online Web Form

- Open your Online Web form.

- Highlight the contact information to be transferred.

- Click the **FormFill** Icon in the AddressGrabber toolbar.

- **AddressGrabber Parse Result window** is displayed.

Figure 46: AddressGrabber Parse Results window - FormFill

- Verify and Edit the details if required.

- Click **Transfer**.

The **Form Info** tab appears only when you are transferring into Online Web Forms. The **Contact** and **Format** tabs contain the same options as available for other applications.

The address is transferred to your Online Web form.

Figure 47: Address transferred to Online Web Form

Transfer Personal details

You can transfer your personal information to any online web form.

In the **Link Options** window, click the **My Profile** tab.

Enter your personal information.

Figure 48: Enter your personal details in My Profile tab

Click **OK.**

Whenever required, this personal information can be transferred to any online web form.

- Open Online Web form.
- Map the Online Web Form Tags.
- Right click the **FormFill** Icon in the AddressGrabber toolbar and select **Send My Profile.**

The information you have entered in **My Profile** tab is automatically transferred to your Online Web form.

9. Transfer using other applications

You can transfer addresses using other applications like Clipboard and Notepad.

9.1. Clipboard

Clipboard can be used as both source and destination.

9.1.1. Setup transfer options for Clipboard

Right click the **Clipboard** Icon in the toolbar and select **Link Options**.

> If the **Clipboard** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.
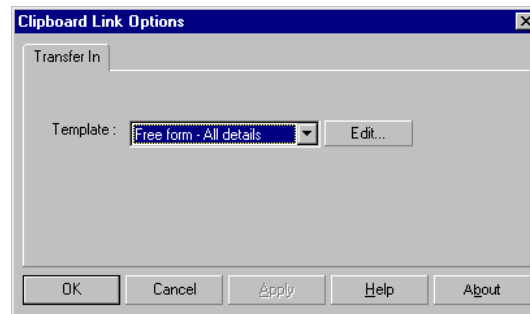
Figure 49: Clipboard Link Options

- Select a template from the **Template for RTF format** list and click **OK**.
- Click **Edit** to create a new template.
- Click **OK**.

Refer Chapter 6 for more details on creating a template.

Now you can transfer addresses from any source application to Clipboard.

9.1.2. Transfer from Clipboard

You can transfer contacts from Clipboard into any destination application.

- Copy an address to Clipboard.
- Ensure that Clipboard is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The contact is transferred to the selected destination application.

 If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

9.1.3. Transfer into Clipboard

To transfer the contact:

- Highlight the contact information to be transferred.

- Click the **Clipboard** Icon in the AddressGrabber toolbar.

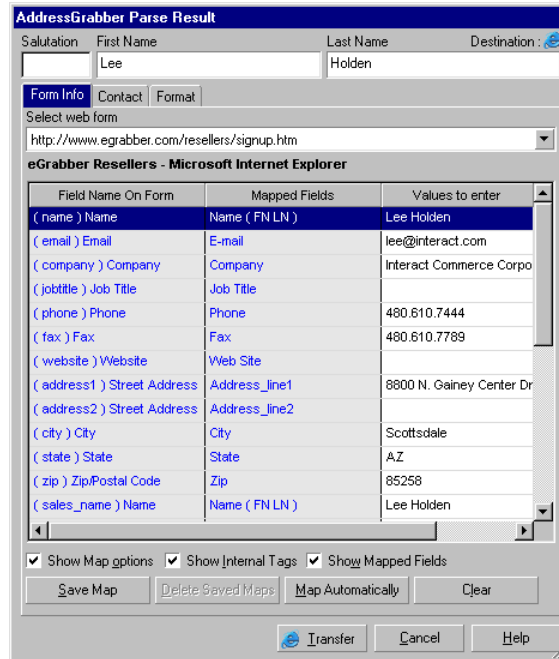- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The Contact is transferred into Clipboard in the selected template format.

 The data in Clipboard can be re-directed to any application.

9.2. Notepad

Notepad can be used as a source application.

- Ensure that Notepad is selected as Source in the AddressGrabber toolbar

- Click the destination icon in the toolbar to which the address should be transferred.

- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.

- Click **Transfer**.

- The contact is transferred to the selected destination application.

 If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

10. License Agreement

This legal document is an Agreement between you, the end user, and eGrabber (THE COMPANY). By signing this Agreement, you are agreeing to become bound by the terms of this agreement, which includes a software license and disclaimer of warranty.

This agreement constitutes the complete agreement between you and THE COMPANY.

TERMS USED

"Subscription-License-Software" refers to Software whose license expires after the subscription period. "Non-Subscription-License-Software" refers to Software that don't have a license expiry date. "Software" or "Product" refers to both Subscription-License-Software & Non-Subscription-License-Software.

Each of the above licenses has different rights as explained in this Agreement.

1.

    a. GRANT OF LICENSE FOR SUBSCRIPTION-LICENSE-SOFTWARE - THE COMPANY grants to you, the Licensee, and your affiliates a worldwide, royalty free non-exclusive right to use the computer program (the "Software") provided hereunder and updated from time to time in accordance with the terms set forth in this agreement (the "Agreement"). The license allows you to use the Subscription-License-Software for the period subscribed by you (one month, three months, six months or one year).

    b. GRANT OF LICENSE FOR NON-SUBSCRIPTION-LICENSE-SOFTWARE - THE COMPANY grants to you, the Licensee, and your affiliates a worldwide, royalty free non-exclusive right to use the computer program (the "Software") provided hereunder and updated from time to time in accordance with the terms set forth in this agreement (the "Agreement").

2. OWNERSHIP OF SOFTWARE - THE COMPANY retains title and ownership of the Software recorded on the original media and all subsequent copies of the Software.

3. COPY RESTRICTIONS - The Software and accompanying written materials are copyrighted. Unauthorized copying of any part of the Software or of any accompanying written material is expressly forbidden. However, you may make a reasonable number of copies of the Software and accompanying documentation for your personal backup purposes.

4. BACKUP THIS SOFTWARE - IT IS YOUR RESPONSIBILITY TO MAINTAIN A BACKUP COPY OF THIS SOFTWARE ON ANOTHER PC OR ON A CD, FOR USE IN THE EVENT OF CATASTROPHIC LOSS SUCH AS HARD DISK CRASH OR LOSS OF YOUR WORKING PC IN ANY OTHER MANNER.As a courtesy, THE COMPANY will maintain links to download Non-Subscription-License-Software that were sold in the past 365 days on THE COMPANY'S support web page. If the version of Non-Subscription-License-Software you purchased is not on the support web page, you will be able to purchase the latest version at the published upgrade price for the Non-Subscription-License-Software, after you provide proof of owner of the original Non-Subscription-License-Software.

5. TRANSFER RESTRICTIONS - This Software is licensed only to you, and you agree that you will not transfer, rent, loan, sub-license or host the Software without the prior written consent of THE COMPANY. You may only make a one-time permanent transfer of the Software in its entirety to another end user, provided you retain no copies and you transfer all of the Software including all component parts, media and printed materials, upgrades, this license agreement AND the recipient agrees to the terms of this license agreement.

6. TERMINATION OF LICENSE - The License will terminate automatically without notice from THE COMPANY if you fail to comply with any provision of this agreement or if you use this Software in a manner that you violate any local, state or federal laws; even if capability to undertake such activity is included in this Software. If you are subscribed to an automatic payment or automatic renewal option, either party can provide 30 days (for one year subscription) or 7 days (for one month subscription) written notice before the end of subscription period to terminate the agreement. If you are not on auto renewal or auto payment, your Software will stop working at the end of the subscription period. You will have to purchase new Software to continue using the program. Upon termination, you must destroy the accompanying written materials and all copies of Software.

7. WARRANTY

   General Warranties. THE COMPANY warrants that: (i) it is duly organized and validly existing under the laws of its state of organization and has full right, power, and authority to enter into and perform its obligations under this Agreement; (ii) it is not and will not be bound by any agreement, nor has it assumed or will it assume, any obligation, which would in any way be inconsistent with or breached by THE COMPANY'S performance of its obligations under this Agreement; (iii) it has obtained all necessary licenses, permits, and other requisite authorizations, has taken all actions required by applicable laws or governmental regulations in connection with its business as now conducted and its ability to perform its obligations under this Agreement; and (iv) it has complied with or will comply with all applicable international, federal, state, local laws and ordinances now or hereafter enacted, including data protection and privacy laws. Performance Warranty. For a period of ninety (90) days after you accept the Software (the "Software Warranty Period"), THE COMPANY represents and warrants that the Software shall be free from any failure to conform to the accompanying documentation (an "Error").No Worms, Bombs or Backdoors. THE COMPANY represents and warrants that no component of any of the Software provided by THE COMPANY hereunder includes any virus or any feature or function that may enable THE COMPANY or any third party: (i) to discontinue your effective use of any such Software or any data provided by THE COMPANY; (ii) to erase, destroy, corrupt or modify any of your data without your consent; (iii) to bypass any internal or external software security measure to obtain access to your data without your consent or knowledge; or (iv) to replicate, transmit, or activate any Software or data without control of a person operating the computing equipment on which it resides THE COMPANY shall immediately provide to you written notice in reasonable detail upon becoming aware of the existence of any computer virus or any of the foregoing features or functions contained in the Software. In the event THE COMPANY discovers the existence of any virus in the Software, THE COMPANY shall use its best efforts to cooperate with you, at THE COMPANY'S expense, to effect the prompt removal of the same from the Software and repair any files or data corrupted thereby. ALL IMPLIED WARRANTIES ARE EXPRESSLY DISCLAIMED, INCLUDING WITHOUT LIMITATION IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE.

8. REVERSE ENGINEERING - You may not yourself or through a third party reverse engineer, decompile or disassemble the Software except, and only to the extent such activity is expressly permitted by applicable laws notwithstanding this limitation.

9. PARTIAL USE - This Software may not be used to develop a competitive product without express written consent from THE COMPANY.

10.

   a. UPGRADES FOR SUBSCRIPTION-LICENSE-SOFTWARE - This license entitles you to free upgrades of the Subscription-License-Software for the subscription period. Following the upgrade, you may use the resulting upgraded Subscription-License-Software only in accordance with this license agreement and you may not sell or re-use the upgraded Subscription-License-Software or the original Subscription-License-Software.

   b. UPGRADES FOR NON-SUBSCRIPTION-LICENSE-SOFTWARE - If this Non-Subscription-License-Software is issued as an upgrade, you must be properly licensed to use the Non-Subscription-License-Software identified by THE COMPANY as being eligible for

the upgrade. Following the upgrade, you may use the resulting upgraded Non-Subscription-License-Software only in accordance with this license agreement and you may not sell or re-use the upgraded Non-Subscription-License-Software or the original Non-Subscription-License-Software.

11.

    a. UPDATES FOR SUBSCRIPTION-LICENSE-SOFTWARE - Certain components of this Subscription-License-Software are required to be updated automatically from time to time due to changes in Address formats and Webpage formats which are not within THE COMPANY's control. This license entitles you to free updates of the Subscription-License-Software for the subscription period. These updates are designed to improve, enhance and further develop the Subscription-License-Software and may take the form of bug fixes, enhanced functions, new Software modules and completely new versions. You agree to receive such updates (and permit THE COMPANY to deliver these to you) as part of your use of the Subscription-License-Software.THE COMPANY will try to maintain the consistency of results by providing Subscription-License-Software updates as and when required. However, due to the dynamic nature of the Internet, THE COMPANY cannot guarantee that websites that are supported and/or accessible at the time of purchase will be supported and/or accessible in the future. THE COMPANY does not warrant to integrate with all views, formats and modes available in each of the websites or applications listed as being supported by the Subscription-License-Software. THE COMPANY does not promise to add all features that are technically feasible into the Subscription-License-Software. THE COMPANY will be the sole decision maker on what integrations to support and what features to add now and in the future. As long as it is technically feasible, THE COMPANY will try to support all features and integrations as provided when the Subscription-License-Software was purchased. If you need support for functionality that is not in the Subscription-License-Software on the day you purchased it, you can request for a price quote as a custom project. All development, testing, QA and project management costs will be added in the quote provided for such requests.

    b. UPDATES FOR NON-SUBSCRIPTION-LICENSE-SOFTWARE - Certain components of this Non-Subscription-License-Software are required to be updated automatically from time to time due to changes in Address formats and Webpage formats which are not within THE COMPANY's control. You shall have the right to obtain Component Update(s) free of cost only for 90 Days. However, you can purchase subscription to Component update(s) for additional fee after the free period of 90 Days to continue receiving such updates, but for the subscribed period only. This License does not otherwise permit the licensee to obtain and use Component Updates. These updates are designed to improve, enhance and further develop the Non-Subscription-License-Software and may take the form of bug fixes, enhanced functions, new Software modules and completely new versions. You agree to receive such updates (and permit THE COMPANY to deliver these to you) as part of your use of the Non-Subscription-License-Software.THE COMPANY will try to maintain the consistency of results by providing Non-Subscription-License-Software updates as and when required. However, due to the dynamic nature of the Internet, THE COMPANY cannot guarantee that websites that are supported and/or accessible at the time of purchase will be supported and/or accessible in the future. THE COMPANY does not warrant to integrate with all views, formats and modes available in each of the websites or applications listed as being supported by the Non-Subscription-License-Software. THE COMPANY does not promise to add all features that are technically feasible into the Non-Subscription-License-Software. THE COMPANY will be the sole decision maker on what integrations to support and what features to add now and in the future. As long as it is technically feasible, THE COMPANY will try to support all features and integrations as provided when the Non-Subscription-License-Software was purchased. If you need support for functionality that is not in the Non-Subscription-License-Software on the day you purchased it, you can request for a price quote as a custom project. All development, testing, QA and project management costs will be added in the quote provided for such requests.

12. RESERVATION OF RIGHTS - THE COMPANY reserves all rights not expressly granted to you in this license agreement.

13. LICENSE KEY DISCLOSURE - You may not disclose to any other person or organization your license key, unless you receive specific written consent to do so from THE COMPANY. You agree to store it and keep it confidential and to notify THE COMPANY immediately if you have any reason to believe that you lost your license key.

14. LICENSE KEY REGISTRATION - There are technological measures in this Software that are designed to prevent unlicensed or illegal use of the Software, and automatic processes provide live updates to Software and routinely optimize Software for normal customer usage. You agree that THE COMPANY may use these measures to protect against Software piracy. This Software may contain enforcement technology that limits the ability to use the Software on multiple computers. This Agreement and the Software containing enforcement technology require license key registration as further set forth during installation and in the Documentation. Verification of the license key happens at periodic intervals and requires the computer to be connected to the Internet. Internet connection failure during the registration check will not allow functioning of the Software.

15. HOSTING - You may install the Software on ONLY ONE PC at any given point of time and you may not permit or enable other individuals to use the Software over a public access network of any kind including, but not limited to, Internet, intranet, bulletin boards, phone or mobile; unless you receive specific written consent to do so from THE COMPANY.

16. CONSENT TO USE OF DATA: You agree that THE COMPANY may collect and use data related to the Software, if any, gathered from your computer as part of the product support services provided to you. THE COMPANY may use this information solely to improve the products or to provide customized services or technologies to you and will not otherwise use or disclose this information in any form. This section shall survive termination or expiration of this Agreement.

17. RESTRICTIONS ON USE - eGrabber tool , should be viewed as a smart copy-paste tool that captures data that is in the public domain & web. eGrabber does not own the data we capture from web & public domain – as such we can't offer any usage rights. Your company needs to make a determination as to what rights you have to data that you capture on the web and act accordingly.

18. EMAILING RESTRICTIONS - THE COMPANY will not be liable if your web site or emails are blocked because of actions taken by this Software on your behalf. The Software could fail occasionally, even though it performs as expected most of the time. You are expected to monitor periodically to ensure the Software is performing as expected by you.

19. EMAILING LIMITS - It is your responsibility to make sure you have the relevant email opt-in permissions, before using this Software to send emails.

20. USAGE LIMITS - THE COMPANY recommends you to acknowledge and agree to the Software usage limits as described in the product FAQs of THE COMPANY's web site (www.egrabber.com). This includes, but not limited to, grabbing, appending and validating contact information. THE COMPANY will not be liable if your access, or the access of other users on your network, to third party web sites and search engines is blocked because of actions taken by this Software on your behalf. THE COMPANY cautions that you use this Software in moderation. You should use it in much the same way as you would use an assistant who gets the data for you. Some third party sites have daily limits on how many contacts you can grab per day or per a given period. THE COMPANY recommends you not to exceed such grabbing limits when using this Software. THE COMPANY is constantly optimizing the Software usage limits to provide the best usage for you. You acknowledge and agree that the Software usage limits will change from time to time without prior notice to you.

21. PIRATING OF DATA IS PROHIBITED - It is your responsibility to make sure you have the relevant rights to capture and store the data the way you plan to, before using this Software. Some web sites and portals prohibit the use of automated capture tools like this Software to capture data, and other sites place restrictions on how captured data can be used.

This agreement expressly prohibits the use of this Software to capture data from such web sites and documents, as well as using such captured data in a manner where it is illegal to do so. THE COMPANY can offer you no opinions on the legality of capturing any data, even if capability to capture such data is included in this Software.

22.

    a. PAYMENT AND BILLING - Payments must be made in advance unless otherwise mutually agreed upon and as specified in the invoice. Not all eGrabber Software are eligible for an alternate payment plan. No monthly invoicing service is available. All payment obligations are non-cancellable and all amounts paid are non-refundable. THE COMPANY will automatically follow the billing process in accordance to the terms agreed upon in the invoice.

    b. NON-PAYMENT AND TERMINATION - THE COMPANY reserves the right to automatically suspend or terminate this agreement if you default on your payment or if your account becomes delinquent (falls into arrears).

    c. REFUNDS – THE COMPANY offers fully functional trial versions for the users to evaluate if the Software's functionality is suitable. As such, THE COMPANY has a 'no refund' policy. However, if there are extenuating circumstances where THE COMPANY determines some refund is due, the following formula will be used.

        ▪ If subscription is based on total usage count of any type – No refund will be due if more than 30% of usage count was used. If the usage was less than 30%, the formula given below under "If subscription is NOT based on total usage count of any type" will be used. Example – if the subscription had a 4,000 annual limit. Refunds will be due only if usage was less than 1,200 (30% of 4,000).

        ▪ If subscription is NOT based on total usage count of any type – For refund computation, the monthly usage cost will be computed at 33% of the annual published MSRP for the product. The entire annual subscription cost of the Software is amortized within the first 3 month term for computing the refund. No refund will be due under any circumstances upon expiration of 3 months. Only the unused portion of the first 3 month term will be eligible for a refund. The term of usage is assumed to begin on the date the Software was registered or one week from the issuance of the key, whichever is earlier and ends the day the Software was last unregistered and refund requested. You must unregister the Software before seeking a refund from THE COMPANY, so as to establish the usage period. The annual subscription price paid by you will be taken as the basis for such calculation. Example – if the annual MSRP of the product was $3,495 (regardless of what you paid). Usage will be computed at $1,153 (33% of $3,495) for refund computation of unused amount. The usage amount will be deducted from the actual amount paid (not any listed price). No refund will be due for monthly licenses of any sort.

    THE COMPANY reserves the right to automatically suspend or terminate this agreement where it is no longer viable to support you, at the sole discretion of THE COMPANY. You will be eligible for refund only for the unused amount of your subscription based on the formula stated above.

    d. LICENSE EXTENSION For Prompt Reporting of Grab Failure - If "Grab" command, on a website you have been leveraging regularly, fails to grab the data we advertise, you will be eligible for license extension on the days you report While Not Working. No credit will be given if you report after the failure is fixed. To get an extension, you must send a written email to support@egrabber.com with the exact URL and nature of failure you are currently experiencing. As a courtesy your Software license will be extended by the days you tried & reported as not working, if eGrabber can verify that the website is functional and all required

data is provided but the failure is in the Software and is deemed fixable. (Please see Section 11, some problems are not fixable such as text now appearing as image). You will receive written notification of license extension within 2 business days. You cannot claim license extension, if you do not report the problem in writing on days of attempted Grab usage and failure. eGrabber has no control on what content websites provide and in what formats they provide the data. They could provide different fields, present data in the form of images, information in several formats or information not accessible via copy command or place other restrictions. As part of this license agreement, eGrabber is only committed to support sites, fields and formats as they existed and supported by the Software at time of your purchase. If you need support for substantially new formats, we might be able to develop custom drivers at an additional cost. Please see sections 11a and 11b for more on the topic of handling website changes.

23. AFFILIATION DISCLAIMER - THE COMPANY is not affiliated or connected in any manner to any third party web sites and search engines, including but not restricted to, online directories, listings, job boards, yellow pages and white pages directories. THE COMPANY recommends you to read license agreements of these third party web sites and ensure you do not violate any Government Laws or rules of the third party web sites before using the Software. You agree that THE COMPANY is not responsible for any such violations committed by you using the Software. DO NOT USE THE SOFTWARE IN ANY CASE WHERE SIGNIFICANT DAMAGE OR INJURY TO PERSONS, PROPERTY OR BUSINESS MAY HAPPEN IF AN ERROR OCCURS, YOU EXPRESSLY ASSUME ALL RISK FOR SUCH USE.EXCEPT AS STATED HEREIN, THE SOFTWARE AND ACCOMPANYING WRITTEN MATERIALS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND. THE COMPANY DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE RESULT OF THE USE, OF THE SOFTWARE OR WRITTEN MATERIALS IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, CURRENTNESS OR OTHERWISE. YOU ASSUME THE ENTIRE RISK AS TO THE RESULTS, QUALITY AND PERFORMANCE OF THE SOFTWARE. IF THE SOFTWARE OR WRITTEN MATERIALS ARE DEFECTIVE, YOU ASSUME THE ENTIRE COST OF ALL NECESSARY SERVICING OR REPAIR OR CORRECTION.EXCEPT AS STATED HEREIN, THE COMPANY MAKES NO WARRANTIES OF ANY KIND, EXPRESSES OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTIBILITY AND FITNESS FOR A PARTICULAR PURPOSE, WITH RESPECT TO THIS SOFTWARE. NO ORAL OR WRITTEN INFORMATION OR ADVICE GIVEN BY THE COMPANY, ITS DEALERS, DISTRIBUTORS, AGENTS OR EMPLOYEES SHALL CREATE A WARRANTY OR IN ANY WAY INCREASE THE SCOPE OF THIS WARRANTY, AND YOU MAY NOT RELY ON ANY SUCH INFORMATION OR ADVICE. Some states do not allow limitations on how long an implied warranty lasts, or exclusion or limitation of incidental or consequential damages, so the above limitations and exclusions may not apply to you. This warranty gives you specific legal rights, and you may also have other rights, which may vary, from state to state.

24. DISCLAIMER ON ACCURACY - THE COMPANY does not guarantee results found by this Software to be 100% accurate. These results are only our Software's best guess based on information analyzed at the time of search. This Software does not conduct an extensive search or analysis of all available information on the Internet. The Software only conducts analysis on a small sample of documents to make a guess. One reason why this Software cannot guarantee accurate results is because there are many similar names of people, universities, hospitals, companies, cities, locations and institutions. It is quite possible that two people can have similar foot prints of contact information on the Internet. As such, it is sometimes difficult to distinguish which contact information corresponds to each person. You are advised not to use the results AS IS. THE COMPANY recommends you to verify through alternate channels the validity of data being provided by the Software before using it in any manner. The results found by this Software may seem inconsistent for the same search conducted at different times. The Software relies on various search engines and web sites to aggregate information from the Internet. THE COMPANY does not control the data on these search engines and third party web sites. As such, the Software will not be able to guarantee the same results at all points of time.

THE COMPANY is constantly innovating in order to provide the best possible experience for you. You acknowledge and agree that the form and nature of the results provided and the user interface will change from time to time without prior notice to you. As part of this continuing innovation, you acknowledge and agree that THE COMPANY may stop (permanently or temporarily) supporting the Software (or any features within the Software) at THE COMPANY's sole discretion, without prior notice to you. You may stop using the Software at any time by unregistering the Software and informing THE COMPANY. You will be entitled to a refund as per the refund policy set forth in this document.

25. BACKUP OF DATA - It is your responsibility to save and/or backup any and all data gathered using this Software. THE COMPANY is not responsible for any loss of data that occurs.

26.

    a. LIMITATION ON SUIT - You agree that any suit or other legal action or any arbitration relating in any way to this Agreement or to the Software MUST be officially filed or officially commenced no later than ONE (1) YEAR after you become aware of the issue giving rise to the suit.

    b. LIMITATION OF LIABILITY - EXCEPT FOR THE COMPANY'S OBLIGATIONS UNDER SECTION 26C BELOW, IN NO EVENT WILL EITHER PARTY OR ITS SUPPLIERS BE LIABLE TO THE OTHER FOR ANY DAMAGES, CLAIMS, OR COSTS WHATSOEVER OR ANY CONSEQUENTIAL, INDIRECT, INCIDENTAL DAMAGES, OR ANY LOST PROFITS OR LOST SAVINGS, EVEN IF THE PARTY HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH LOSS, DAMAGES, CLAIMS OR COSTS OR FOR ANY CLAIM BY ANY THIRD PARTY. THE FOREGOING LIMITATIONS AND EXCLUSIONS APPLY TO THE EXTENT PERMITTED BY APPLICABLE LAW IN YOUR JURISDICTION. EACH PARTY'S AGGREGATE LIABILITY AND THAT OF ITS SUPPLIERS UNDER OR IN CONNECTION WITH THIS AGREEMENT SHALL BE LIMITED TO THE AMOUNT PAID FOR THE SOFTWARE.

    c. THE COMPANY shall defend you against any claim, demand, suit, or proceeding ("Claim") made or brought against you by a third party alleging that the Software or your use of the Software as permitted hereunder infringes or misappropriates the intellectual property rights of a third party, and shall indemnify you for any damages finally awarded against, and for reasonable attorney's fees incurred by you in connection with any Claim; provided that you (a) promptly give THE COMPANY written notice of the Claim, (b) give THE COMPANY sole control of the defense and settlement of the Claim (provided that THE COMPANY may not settle or defend any Claim unless it unconditionally releases you of all liability), and (c) provide to THE COMPANY all reasonable assistance, at THE COMPANY's expense.

    d. INDEMNIFICATION - You indemnify THE COMPANY and hold THE COMPANY harmless for all damages, losses and costs (including, but not limited to, reasonable legal fees and expenses) arising out of all third party claims, charges, and investigations, caused by (1) your failure to comply with this Agreement, including, without limitation, your accessing or importing content that violates or infringes third party rights or applicable laws; (2) any content you extract; or (3) any method or process or activity in which you engage on or through the Software.

27. GOVERNING LAW AND FORUM - All disputes arising out of, under, or related to this Agreement will be brought exclusively in the state or federal courts located in Santa Clara County, California, USA.

28. COMPLETE AGREEMENT - This Agreement is the complete Software license agreement between you and THE COMPANY, and supersedes all prior negotiations, agreements, and understandings concerning its subject matter. The interpretation of this Agreement may not be explained or supplemented by any course of dealing or performance, or by usage of trade.

If you have any questions concerning this Agreement, or if you desire to contact THE COMPANY for any reason, please contact in writing.

eGrabber Inc.
1340 S. De Anza Blvd., Suite #106
San Jose, CA 95129
USA

11. Index

U

V