



“Quickest way to transfer names and addresses into CRM”

Quick Start Guide

Takes only a few minutes to read...



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

Phone: (408) 872-3103 • Fax: (408) 861-9601

Welcome to AddressGrabber for Web CRM v4.0!

Thank you for choosing AddressGrabber. To get started we have included this starter's guide. Spend a few minutes to read this guide and start using the product.

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Introduction

Using AddressGrabber software, you can transfer addresses from text documents, web pages, e-mail, spreadsheets, databases, and Outlook to salesforce.com with just one click!



Figure 1: How AddressGrabber Works?

System Requirements

- Pentium or equivalent
- 256 MB RAM or as required by the OS
- 100 MB disk space to install the program
- **Operating System:**
 - Microsoft Windows Vista (32-bit) Enterprise Edition
 - Microsoft Windows XP (Service Pack 2.0)

Supported Applications

- Clipboard
- Microsoft Excel
- Microsoft Outlook
- PC Recruiter for Web
- Big Biller
- Salesforce.com Professional and Enterprise Edition

Installing the Software

Visit <http://www.egrabber.com/agwebcrm/trial.html> to download the installation file. Run the program from the folder where you have stored the installation files. The installation wizard guides you through rest of the process.

Registering the Software

After installation, **eGrabber Product Registration** dialog box appears.

If you have purchased the software or registered for a trial version, you should have received the License Key via email.

◆ **Purchased the software:** If you have purchased the software, type or paste the Purchase Key under "Please type or paste your License Key here" and then click **Register Now**.

 You can use AddressGrabber for one year or as specified in the Purchase Agreement. The software expires in one year or as specified after the date of registration.

◆ **Use the Trial version:** If you have registered for a trial version, type or paste the Trial key under "Please type or paste your License Key here" and then click **Register Now**.

◆ The message "**Successfully registered**" appears under the Status area. Click **Continue** to start using the Software.

 The evaluation version is a full-featured product but is limited to be used for 10 days or for 100 successful transfers. To purchase AddressGrabber for Web CRM, contact eGrabber by email (sales@egrabber.com) / call 1-866-299-7314 / click [here](#) to buy the software.

◆ Click **Continue Trial** to evaluate the product for 3 days.

AddressGrabber Toolbar

AddressGrabber for Web CRM is launched as a floating toolbar.

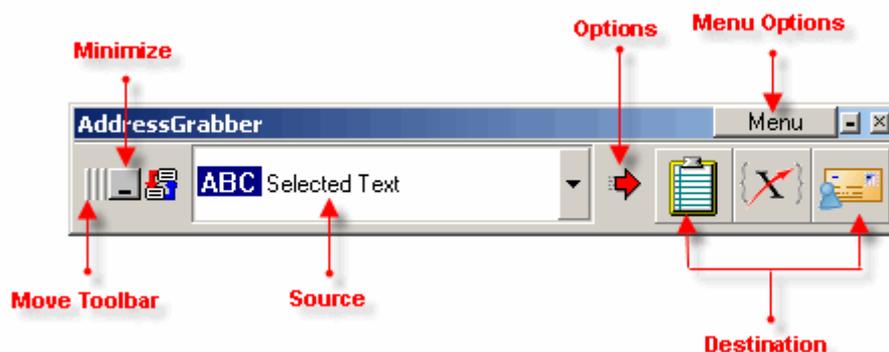


Figure 2: AddressGrabber Toolbar

The toolbar can be moved and placed at any convenient position. You can select the Source and destination application from the toolbar. You can also modify the settings by using the menu options.

When minimized, AddressGrabber appears as a System Tray Icon.

Click the System Tray Icon to view the toolbar. You can also Right-Click the System Tray Icon to access the menu options.

Using AddressGrabber

AddressGrabber is a handy software used to capture addresses from Email signatures, web pages, text files, word documents. Addresses are automatically transferred into appropriate fields in Salesforce.com.

Transferring from Web Forms

You can use the Sample web forms provided along with the product to test the transfer into salesforce.com. The sample Web Form is a text document, which contains the content of a web-form-e-mail.

Click **Start >Programs>AddressGrabber for Web CRM >Sample > WebForm.**

[OR]

Click **Menu >Sample > Web Form in the toolbar.**

Highlight an address in the sample web form.

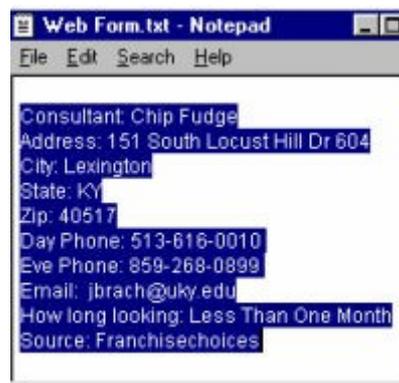


Figure 3: Highlighted Address from web form

Before transferring web forms, it is recommended to map your web form tags to Salesforce.com. This is a one-time setup.

Right click on the salesforce.com icon in the AddressGrabber toolbar and select Setup Form Fields.

In the wizard, copy and paste your sample web form. The Setup Form wizard provides step-by-step instructions on mapping web form tags to salesforce.com.

Click the salesforce.com icon in the AddressGrabber toolbar.

The **AddressGrabber Parse Result** window displays the contact information extracted from the web form for verification. If necessary, edit the fields.

Figure 4: AddressGrabber Parse Results window

You can also format the Contact and E-mail fields by clicking the **format** tab.

Click **Transfer** in the Parse Results window to transfer the address to salesforce.com

Now the contact details are transferred and a new contact is created in salesforce.com database.

Figure 5: Contact transferred to salesforce.com

Transferring from Web pages, E-mail and Documents

You can also transfer addresses from email, web pages or documents.



Figure 6: Highlighted Address from a document

Highlight an address from a text file / word document/ E-mail signatures/ Web page.

Ensure that salesforce.com is open and click the salesforce.com icon on the AddressGrabber toolbar.

The **AddressGrabber Parse Results** dialog box appears that displays the parsed address for verification. Edit if required and click **Transfer** to transfer the address to salesforce.com

The selected contact details are transferred to salesforce.com

Transferring from Outlook

Select a contact from Outlook.

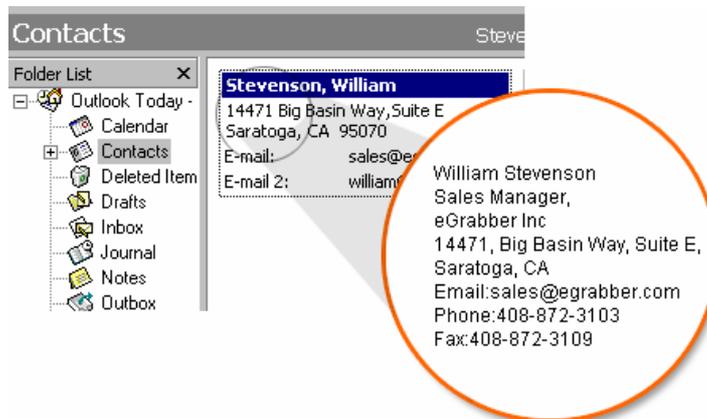


Figure 7: Select a contact from Outlook

Ensure that Outlook is displayed as source in the toolbar. Click the salesforce.com icon on the AddressGrabber toolbar.

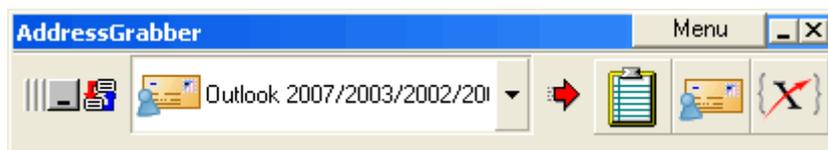


Figure 8: Outlook as Source

The **AddressGrabber Parse Results** dialog box appears that displays the parsed address for verification. Edit if required and click **Transfer** to transfer the address to salesforce.com

Now the contact details are transferred and a new contact is created in salesforce.com.

You can also:

- ◆ Transfer Addresses into PC Recruiter, Outlook, Excel, and Clipboard.
- ◆ Check for duplicates while transferring into Salesforce.com, PC Recruiter and Outlook.
- ◆ Format the Contact Information before transferring into your destination.

And more...



Refer to Help Topics for more details.

Technical Support

Telephone: (408) 872-3103 Weekdays 8:30 AM - 4:30 PM Pacific Time

Fax: (408) 861-9601

E-mail: support@egrabber.com

Web: <http://egrabber.com/agwebcrm/>

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