AddressGrabber
for Web CRM v4.0

User Guide

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Preface

This guide explains in detail about the features of AddressGrabber for Web CRM v4.0. 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.

What is on the CD?

The AddressGrabber for Web CRM CD contains the following:

Item	Description
Installation Files	The files required for installing AddressGrabber for Web CRM.
Quick Start Guide	Quick Start Guide provides a short tour about the Software.
Read me (Readme.Txt)	Text file that provides technical information.
Sample Addresses	Sample addresses to test transfer of information.

Conventions

The following conventions are used in this guide:

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

1. About AddressGrabber for Web CRM

Using AddressGrabber for Web CRM, 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

- Extract contact details from sources that contain address information.

- Pull out individual address details like Name, Company, Street, City, State, Zip, Phone, Fax, Email address and Web site.

- Transfer extracted details to online CRMs like Salesforce.com and PC Recruiter.

- Check for Duplicates.

- Schedule and attach Activities in Microsoft Outlook.

- Build your Lead Database in seconds.

- Automate data entry and save potential time.

- Overcome manual data entry errors.

- Easy and flexible to use with zero learning curve.

1.2. Supported Applications

AddressGrabber for Web CRM supports the following applications:

- Clipboard

- Microsoft Excel

- Microsoft Outlook

- PC Recruiter for Web

- salesforce.com

- Big Biller

1.3. AddressGrabber Toolbar

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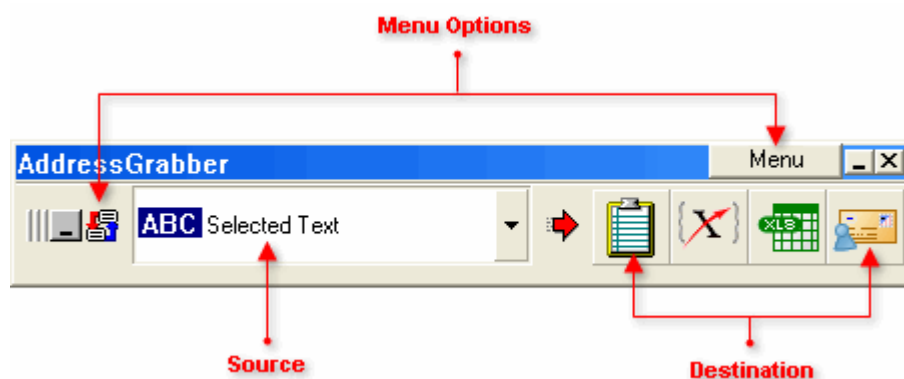

Figure 1: AddressGrabber Toolbar

- 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 for Web CRM 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 for Web CRM.

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.
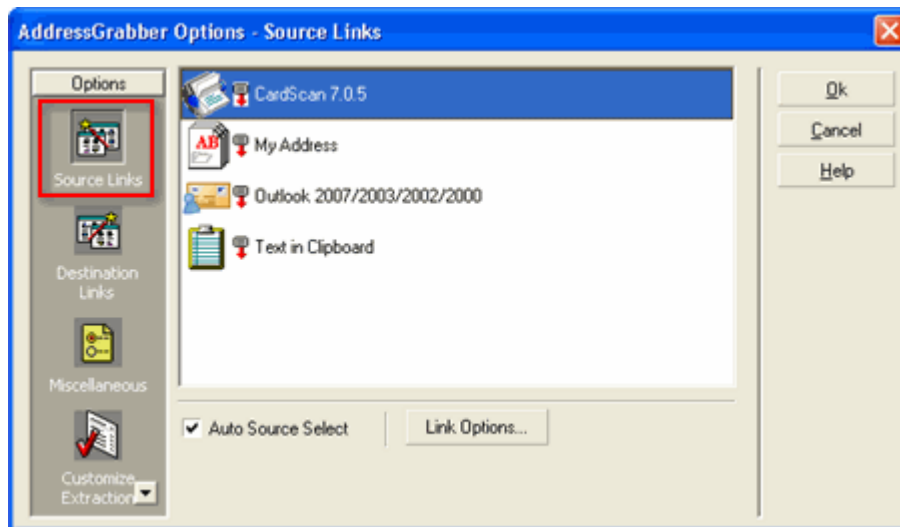
Figure 2: Source Links

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.
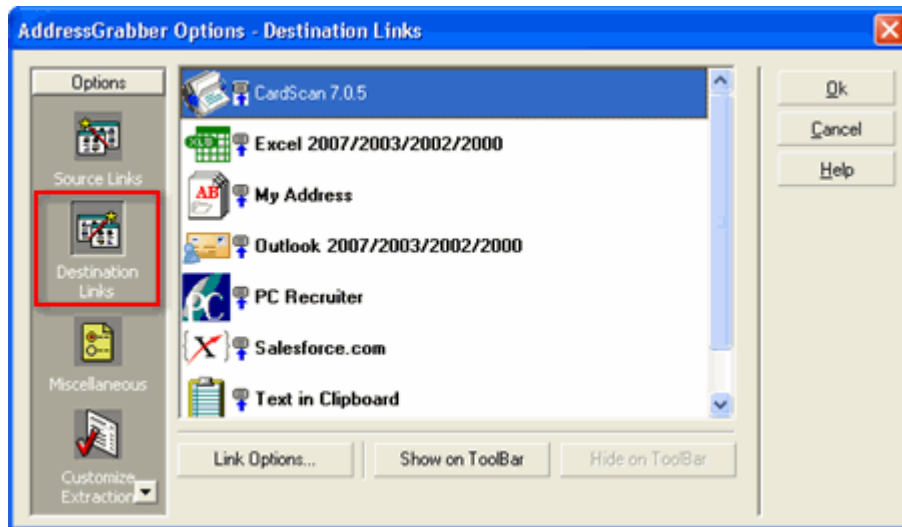
Figure 3: Destination Links

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.
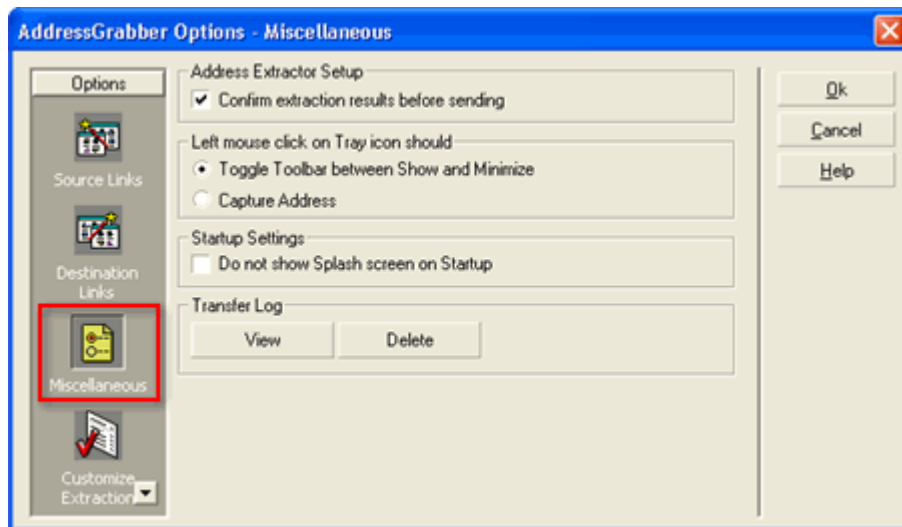
Figure 4: Miscellaneous Settings

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.

Click **OK** to save settings.

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

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.
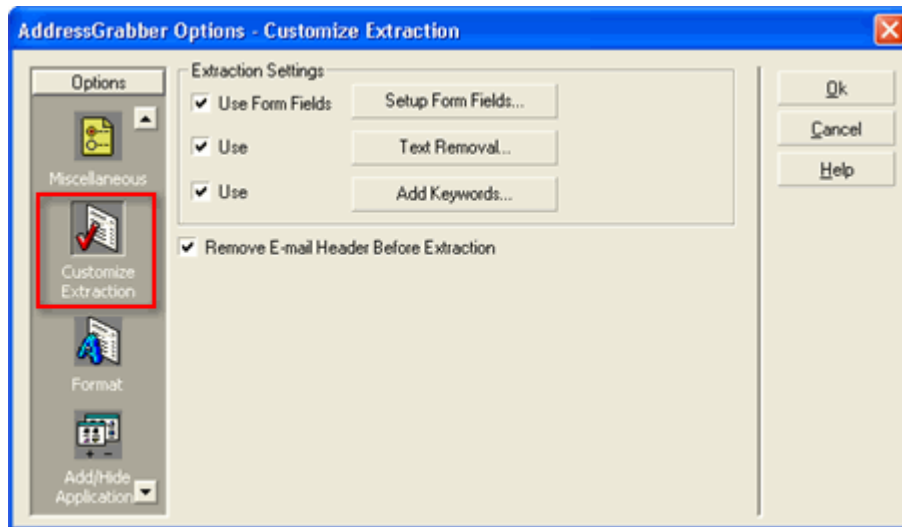
Figure 5: Customize Extraction

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**.
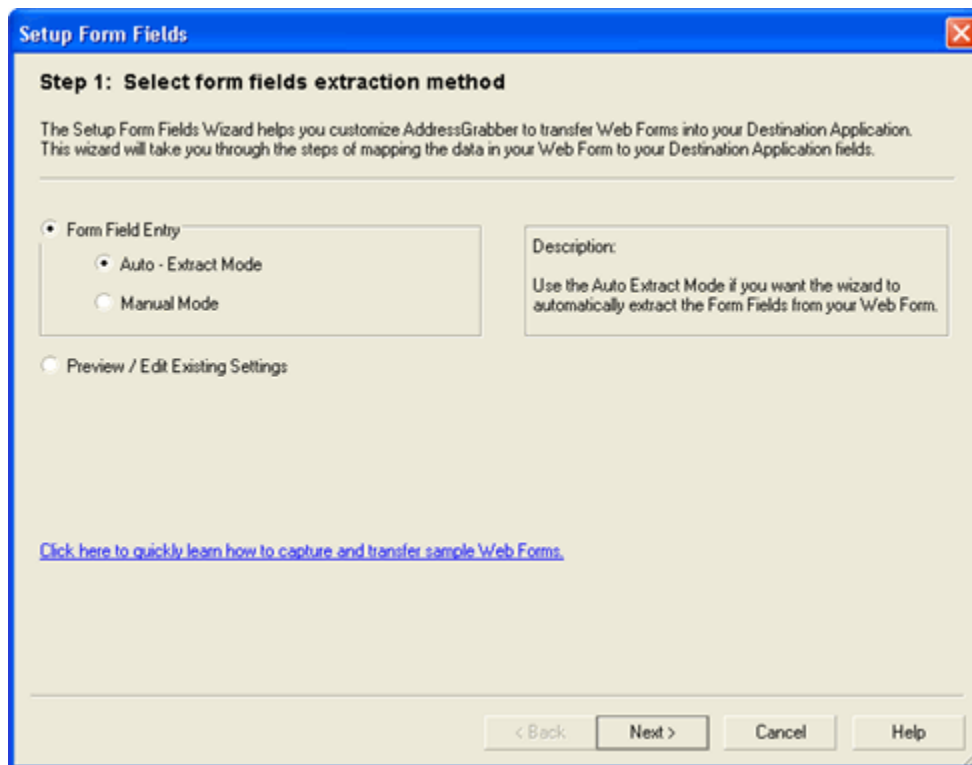
Figure 6: Select form fields extraction method

Click **Next**.

Step 2: Paste your form

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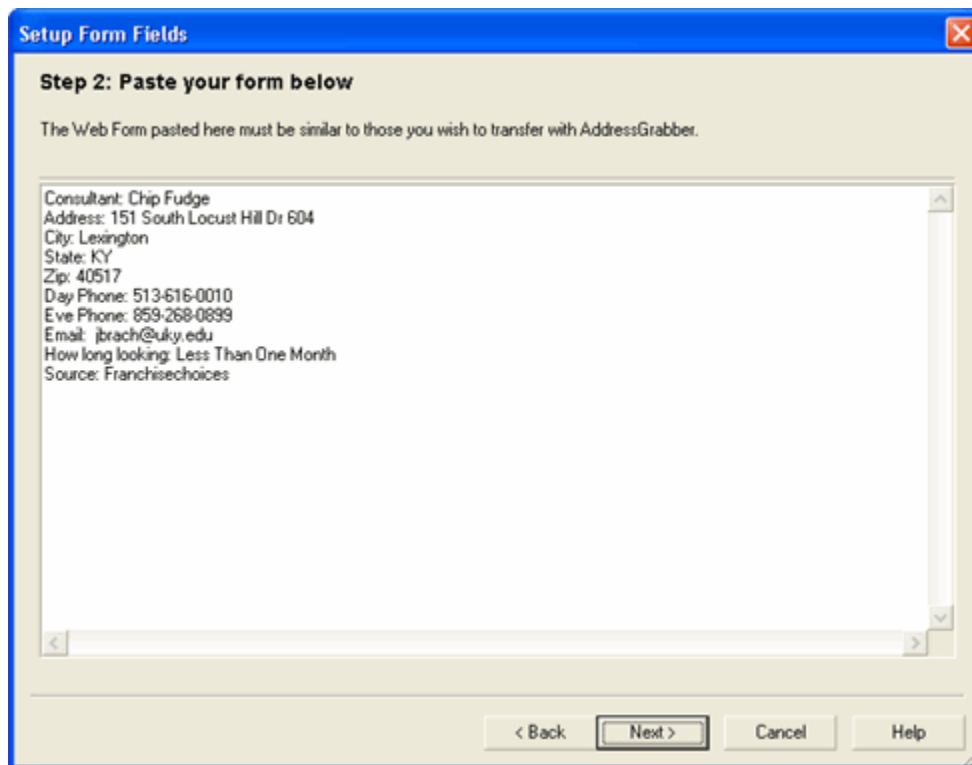
Figure 7: Paste your form

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.
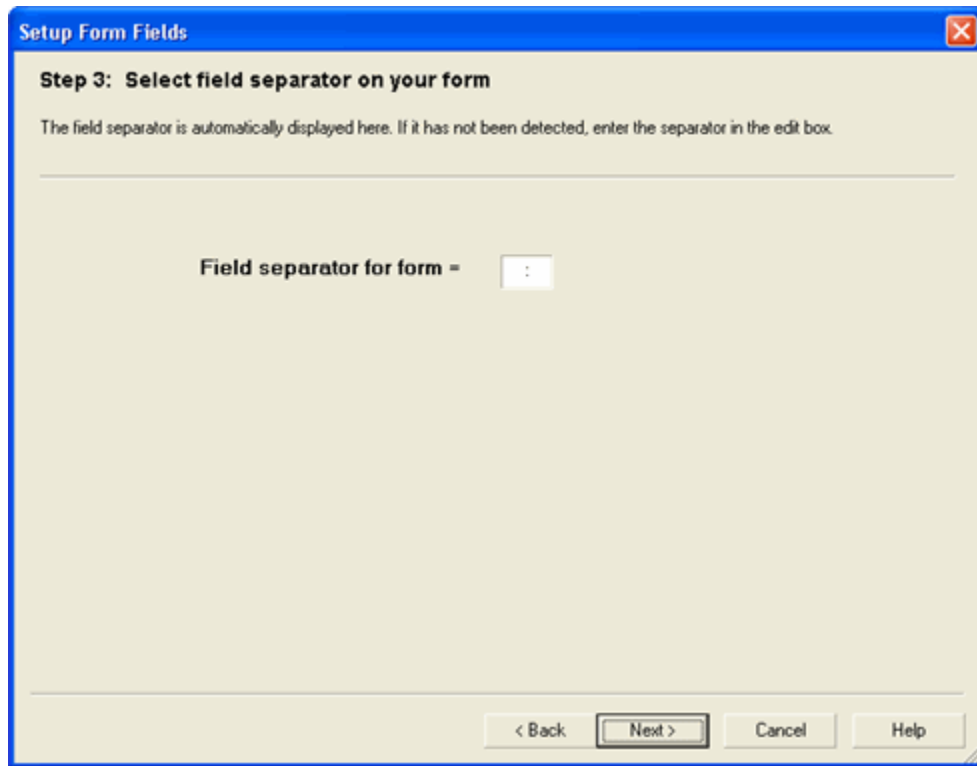
Figure 8: Select field separator on your form

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.
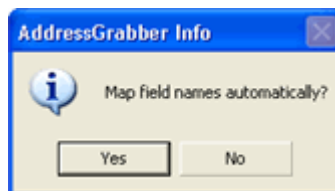
Figure 9: Message box to map fields

- Click **Yes** to map the field tags automatically.
- Click **No** to map the tags manually.

Figure 10: 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 destination Icons 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.
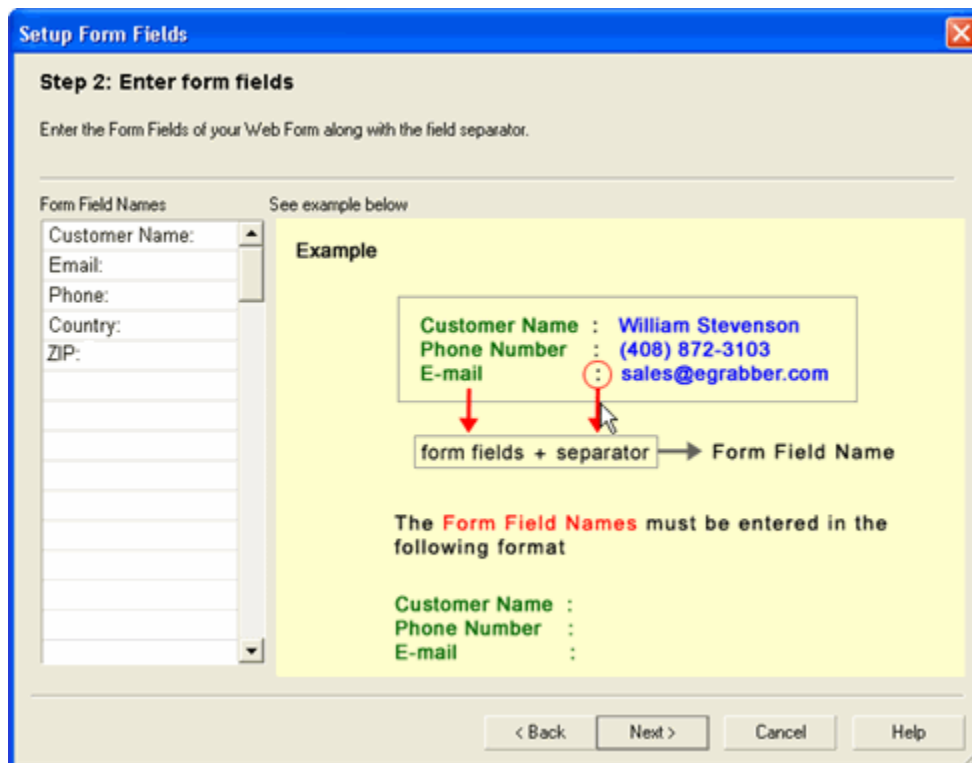
Figure 11: Enter form fields

- Click **Next.**

Step 3: Map field names in form to Application

You can map the fields either manually or automatically.
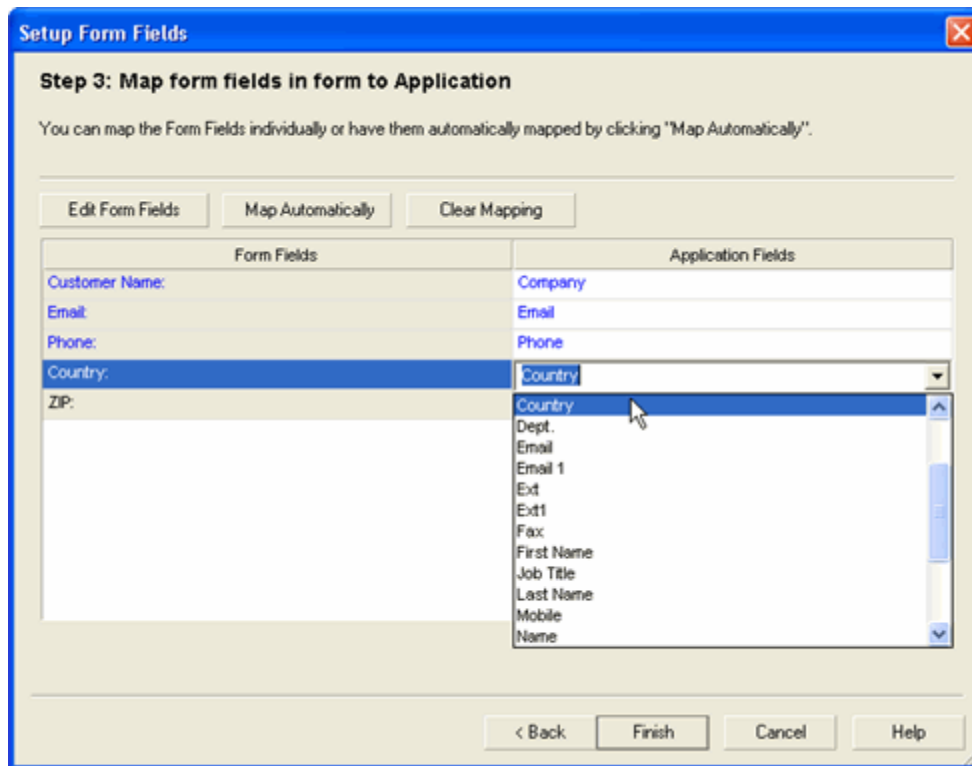
Figure 12: Map field names in form to Application

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 destination Icons 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 **Field Names.**
- ▪ 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.
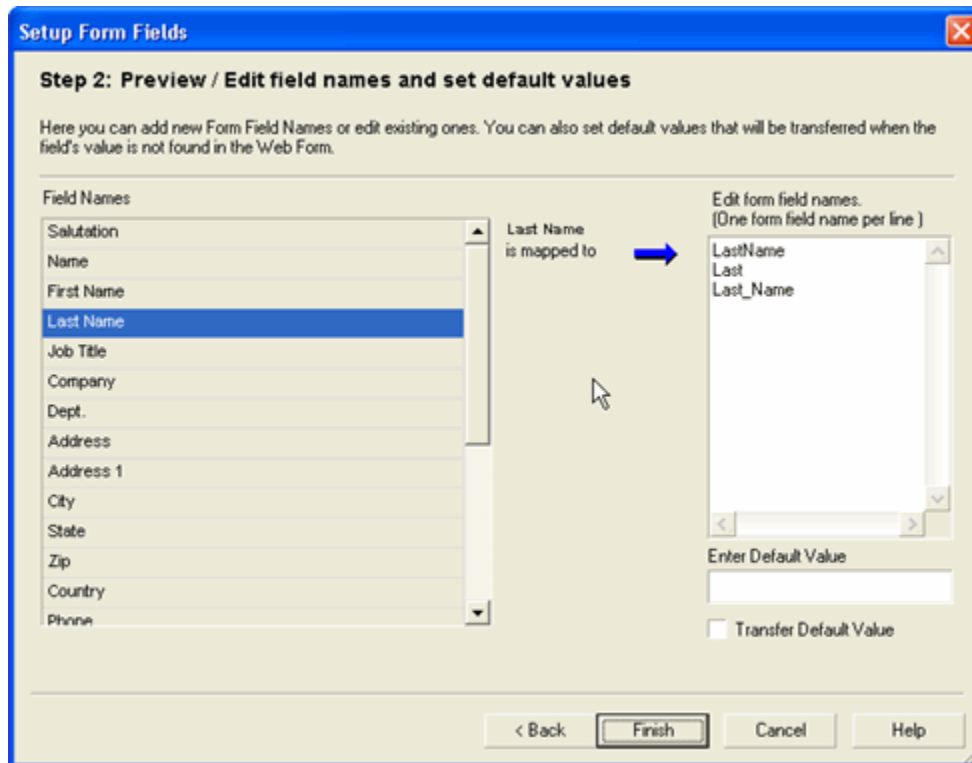
Figure 13: Preview/ Edit field names and set default values

- **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.

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

- In the **Link Options** dialog box, click the **Transfer In** tab

- Click **Add Form Tags**.

The **Setup Form Fields** for the selected application appears.
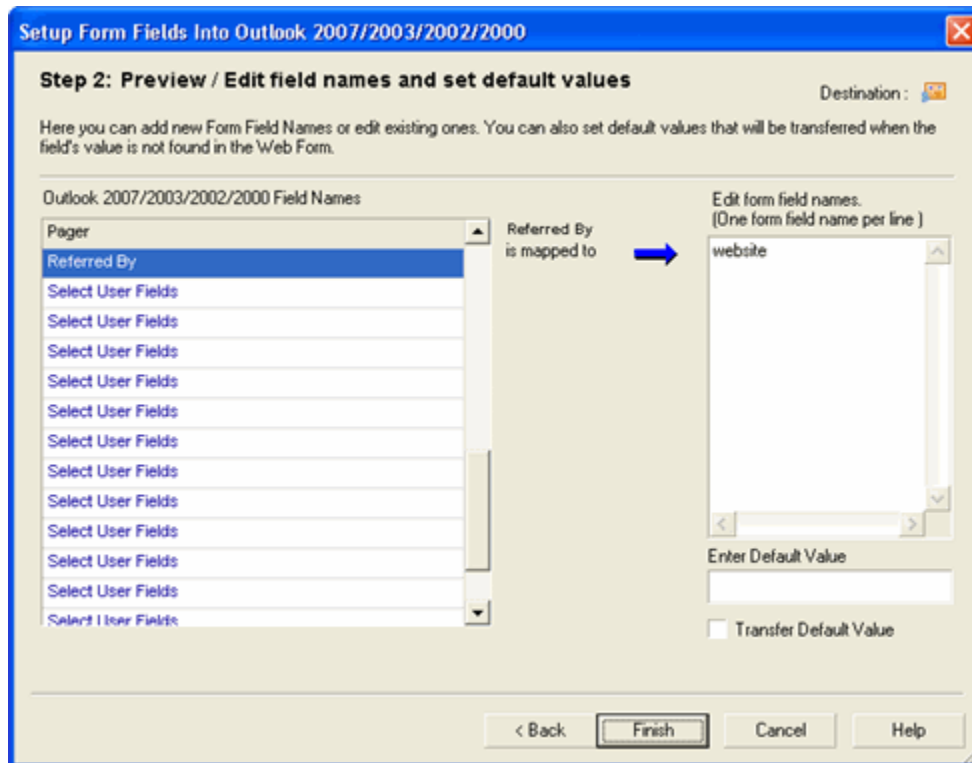
Figure 14: Setup form fields for user fields!

- 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**.
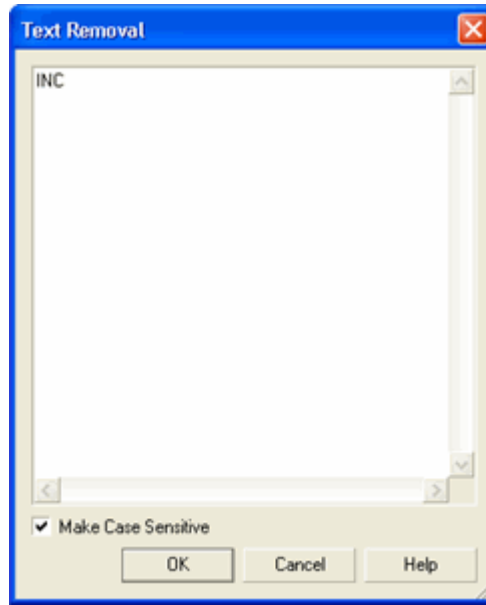
Figure 15: Text Removal

Example:

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.

Example:

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.
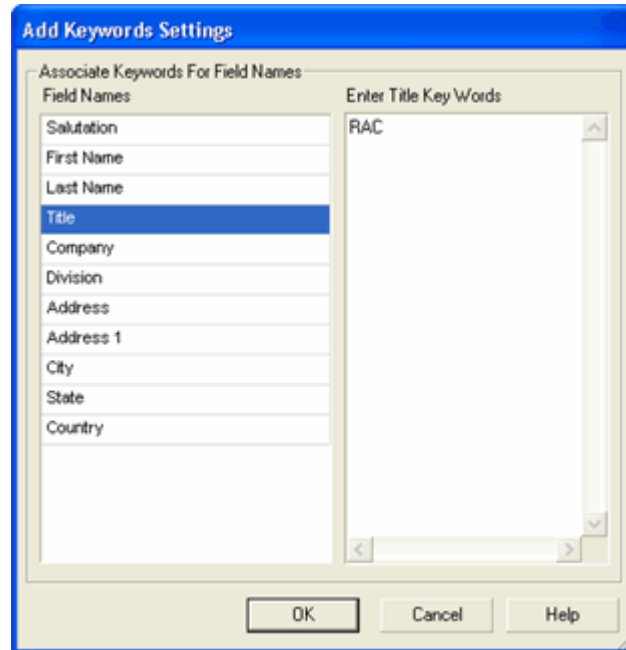
Figure 16: Add Keywords Settings

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 the following options:

2.6.1. Format Contact Fields

In the **Contact** tab, all the contact fields are displayed.
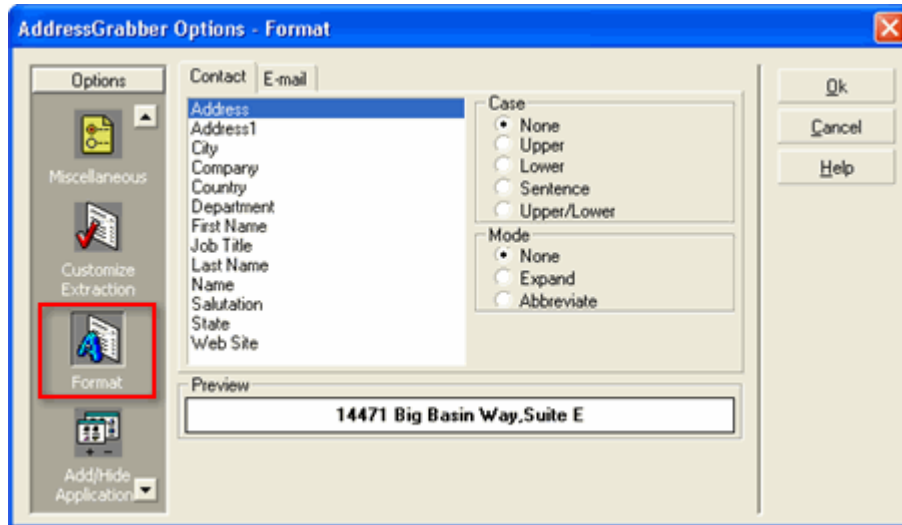
Figure 17: Format Contact Fields

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 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
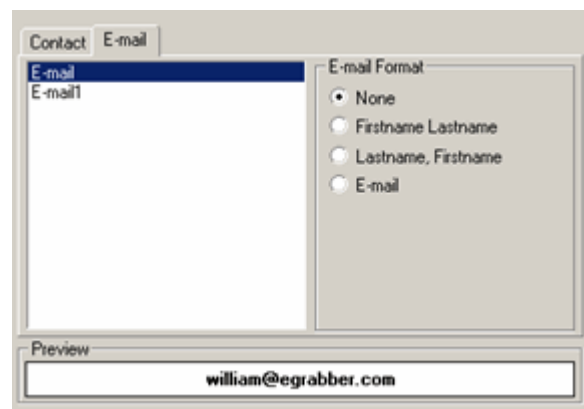
Figure 18: Format Email field

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.
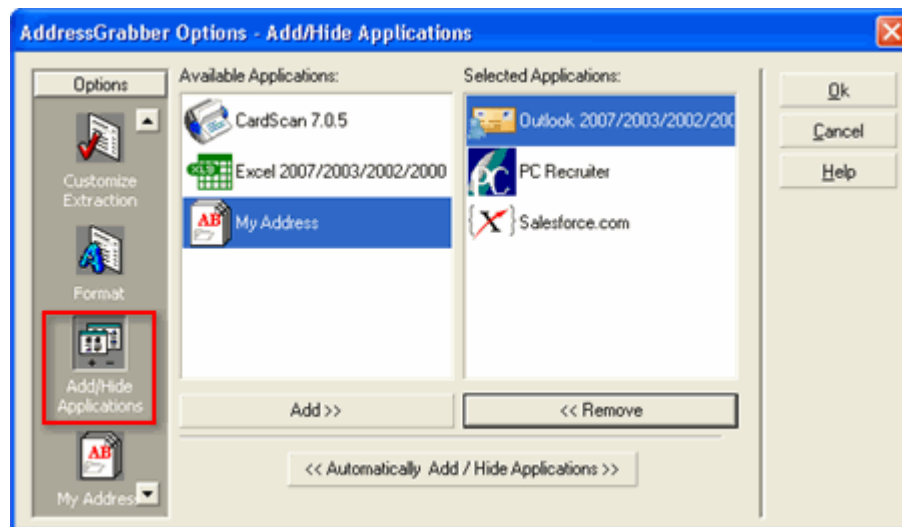
Figure 19: Add/ Hide Applications

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.
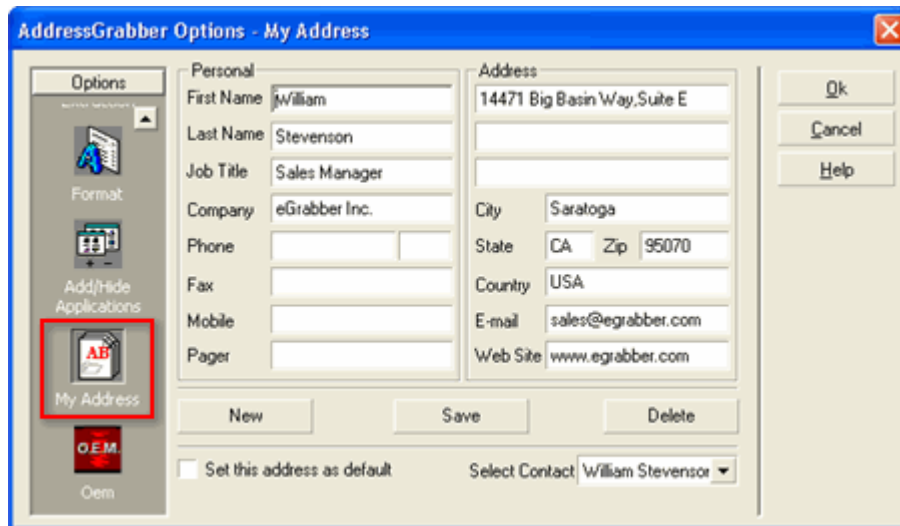
Figure 20: My Address

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.
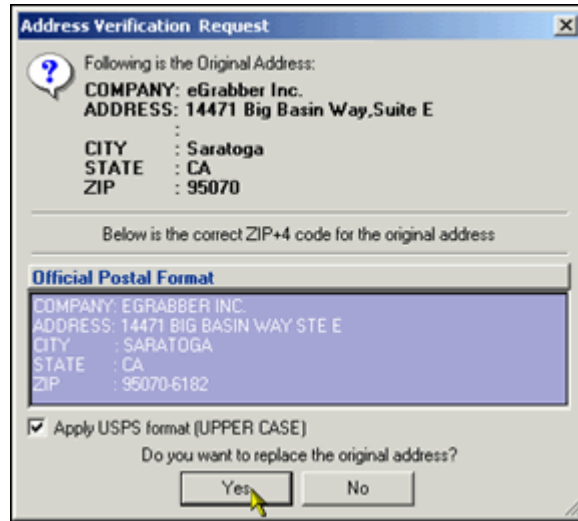
Figure 22: Address Verification - Result

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. Refer to Chapter 2 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 dialog box 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 entered for your database..

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

Transfer In tab

This tab appears when you are transferring to salesforce.com

salesforce.com database consists of two sections: Lead and Account/Contact. You can select the section to which the contact details need to be transferred.

Refer to Setup to Transfer In to salesforce.com for more details.

Activity tab

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

Refer to Schedule Activities for Outlook for more details.

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 **Transfer In** tab is displayed for salesforce.com only
>
> The **Activity** tab is displayed for Microsoft Outlook only.

4. Transfer using salesforce.com

You can transfer addresses into salesforce.com - the online CRM.

4.1. Setup Transfer Options for salesforce.com

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

- ▪ Login to salesforce.com database.
- ▪ Setup to transfer into different address sections, i.e., Lead or Account / Contact section.
- ▪ Setup Form tags while transferring from web forms.

- Check for Duplicates.

Right click the salesforce.com Icon in the toolbar and select **Link Options** to setup the options.

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

4.1.1. Login to salesforce.com

In the **Link Options** dialog box, click the **Login** tab.
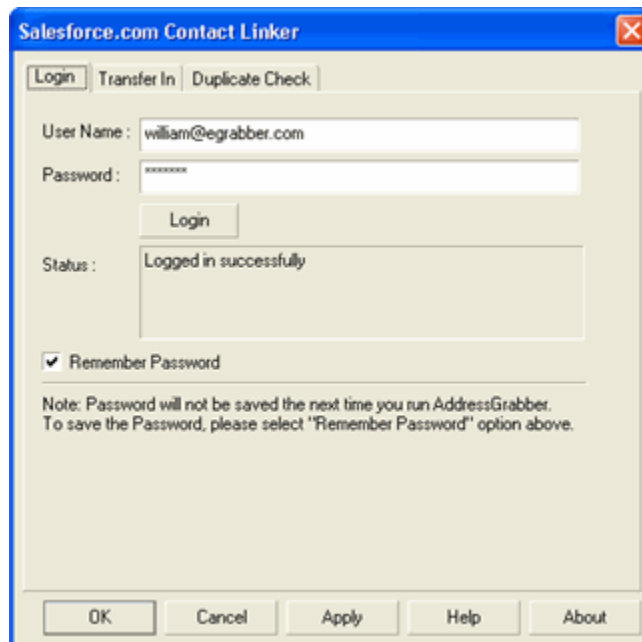
Figure 23: Login to salesforce.com

Ensure that you have already logged in to salesforce.com database.

Enter the salesforce.com database user name and password and click **Login**. The message "Logged in successfully" appears in the **Status** area.

Remember Password: Select this checkbox so that AddressGrabber remembers your password. Else, you need to enter the password each time you launch AddressGrabber and transfer to salesforce.com

4.1.2. Setup to Transfer In

You can setup to transfer the addresses to specific sections in salesforce.com

In the **Link Options** dialog box, click the **Transfer In** tab.
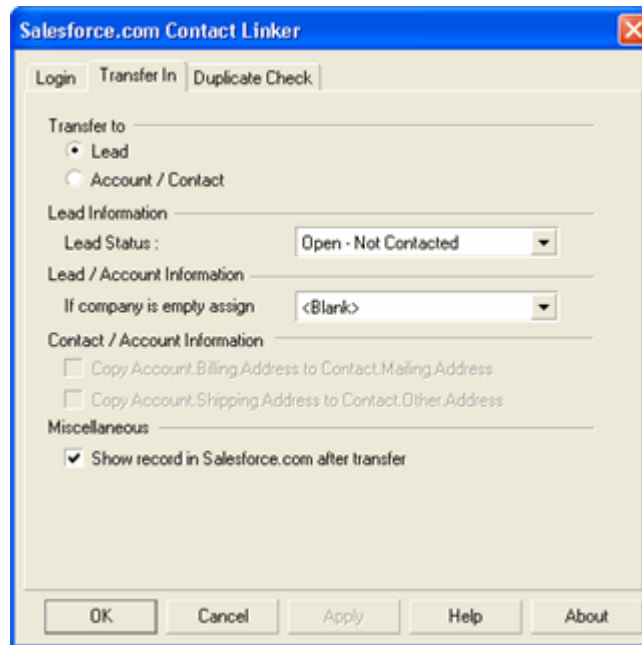
Figure 24: Setup to Transfer In to salesforce.com

Under **Transfer to,** select the section to which the address is to be transferred.

- **Lead:** Select this option to save the address in the Lead section
- **Account** / **Contact:** Select this option to save the address in the Account and Contact section

If you select to transfer into the Lead section, you can setup the **Lead Status** under **Lead Information**. You can select any one of the following statuses from the drop-down list:

- **Open – Not Contacted**
- **Working – Contacted**
- **Closed – Converted**
- **Closed – Not Converted**

Select the appropriate option to indicate the current status of the transferred contact.

> The above option is enabled only if you have selected to transfer to the Lead section.

Under **Lead / Account Information,** you can assign to transfer a value if the Company value is empty in the contact record.

- **Leave Blank:** Select this option to leave the Company name blank after transfer.
- **First Name, Last Name:** The contact Name is transferred to the Company field. **Example:** If the first name is *William* and last name is *Stevenson*, then the Company value is saved as *William Stevenson*.

- **Last Name, First Name:** The contact Name is transferred to the Company field. **Example:** If the first name is *William* and last name is *Stevenson*, then the Company value is saved as *Stevenson William*.

Under **Contact / Account Information**, you can select the sections in the Contact and Account sections to save the addresses.

- **Copy Account.Billing Address to Contact.Mailing Address**: Select this checkbox to transfer a copy of Account Billing Address to the Contact Mailing Address fields of salesforce.com.

- **Copy Account.Shipping Address to Contact.Other Address**: Select this checkbox to transfer a copy of the Account Shipping Address information to the Contact.Other Address fields of salesforce.com.

The above option is enabled only if you have selected to transfer to the Account / Contact section.

Show record in salesforce.com after transfer: Select this checkbox to view the contact details after transfer is completed.

4.1.3. Check for Duplicates

You can setup the duplicate check to avoid transferring duplicate contacts to salesforce.com. AddressGrabber provides various options to handle the duplicate contacts.

Click **Duplicate Check** tab to define the duplicate check criteria.

The duplicate check is performed for the Lead section or the Account section according to the setup made to Transfer In.

If you have selected to transfer to the **Lead** section in the **Transfer In** tab, then the Duplicate check is performed for the Lead section.
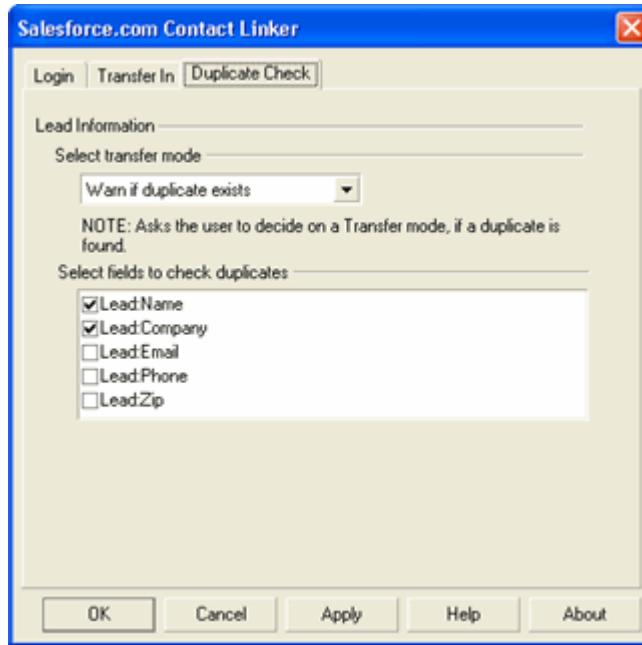
Figure 25: Check for Duplicates in Lead Section

Under **Select transfer mode**, select one of the following options:

- **Add as new** to add the duplicate as a new contact to your database.

- **Update if duplicate exists** to update the existing contact in your database.

- **Warn if duplicate 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:

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.

- **Cancel if duplicate exists** to cancel transferring the duplicate contact to your database.

When you select any of the above options except **Add as new,** the fields under **Select fields to check duplicates** are made available. Select a single field or multiple fields to check for duplicate values.

Click **OK** to save the settings.

If you have selected to transfer to the Account / Contact section, then the duplicate check is performed for the Account / Contact Information.
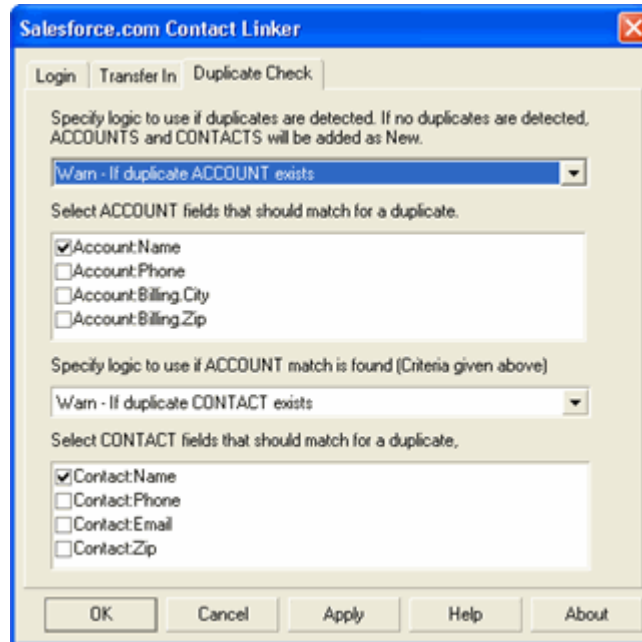
Figure 26: Check for Duplicates in Account Section

Here, the duplicates are checked for the Account section. You need to select the mode to handle the duplicates, if found, for the Account section. Based on the selected option, you can select the mode for the Contact section.

Select the mode for the Account section.

- **Add as new** to add the duplicate record as a new contact.

- **Warn – If duplicate ACCOUNT exists** to get a warning message when a duplicate record is found. A **Contact Linker** dialog box appears with the following options to handle the duplicate contact.

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.

- **Update ACCOUNT Details – If duplicate ACCOUNT exists** to update the existing contact.

- **Don't Change ACCOUNT Details – If duplicate ACCOUNT exists** to leave the Account information unchanged. For example, assume that an Account name with 'eGrabber' already exists in the database. Now, if a contact with same Account name but containing different address details is transferred, then the Account information remains the same and not modified. The duplicate check is continued with the Contact section.

- **Cancel Transfer – If duplicate ACCOUNT exists** to cancel the transfer process.

When you select any of the above options except **Add as new,** the fields under **Select ACCOUNT fields that should match for a duplicate** are made available. Select a single field or multiple fields to check for duplicate values.

When you select any of the options except **Add as new** and **Cancel Transfer** the options under **Specify logic to use if ACCOUNT match is found** are enabled. Select the mode for the Contact section.

- **Add as new** to add the duplicate record as a new contact.

- **Warn – If duplicate CONTACT exists** to get a warning message when a duplicate record is found. A **Contact Linker** dialog box appears with the following options to handle the duplicate contact.

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.

- **Update CONTACT Details – If duplicate CONTACT exists** to update the existing contact.

- **Don't Change CONTACT Details – If duplicate CONTACT exists** to leave the Contact information unchanged. For example, assume that a Contact name with 'eGrabber' already exists in the database. Now, if a record with same Contact name but containing different address details is transferred, then the Contact information remains the same and not modified. (That is the transfer is cancelled.)

After selecting the appropriate options, click **OK** to save the settings.

4.2. Transfer into salesforce.com

To transfer the contact:

- Highlight the contact information to be transferred.

- Click the salesforce.com 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 salesforce.com database.

Figure 27: Contact transferred to salesforce.com

Ensure that you have already logged into salesforce.com

> 📝 The address text is transferred to the **Description** field in the Leads section of salesforce.com

5. Transfer using PC Recruiter

You can transfer your addresses into the online Address Management System. You need to have already setup an account with PC Recruiter.

5.1. Setup Transfer Options for PC Recruiter

Before transferring addresses into PC Recruiter, you need to setup the following:

Download grabber.exe from

http://www.egrabbersupport.com/submissions/PCR/grabber.exe

> [OR]

http://office.pcrecruiter.com/grabber.exe

Save grabber.exe in your PC Recruiter server in the following path:

\\inetpub\wwwroot\pcrbin

Now right click the PC Recruiter Icon in the toolbar and select **Link Options** to setup the options.

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

5.1.1. Login to PC Recruiter

To transfer addresses into PC Recruiter using AddressGrabber, you have to setup the following:

In the **PC Recruiter Transfer Options** dialog box, enter the following details in the **Login** tab:
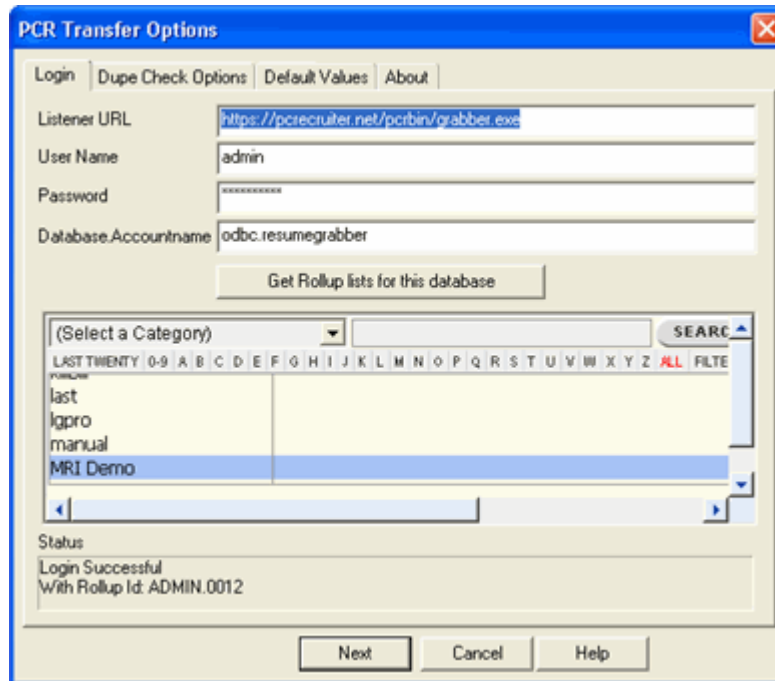

Figure 28: Login to PCR

Enter the following data.

Listener URL: The URL must be entered according to the server hosted by you.

For database hosted on Main Sequence Technologies (MST):

If you have hosted your database on Main Sequence Technologies (MST), then your URL appears as follows:

URL for MST Server: https://pcrecruiter.net/pcrbin/grabber.exe

> If your system is protected with security settings, the above URL may not function properly. In such cases, change the URL as http://pcrecruiter.net/pcrbin/grabber.exe

For database hosted on your server:

If you have hosted your database on your own server, then your URL appears as shown in the following example:

Example URL for your server: http://yourservername.com/pcrbin/grabber.exe

In the above example, replace yourservername.com with your server name.

User Name: Enter your PC Recruiter database user name.

Password: Enter your PC Recruiter database password.

Database.Accountname (Profile):

For database hosted on Main Sequence Technologies (MST):

- If you have hosted your database on MST, the account name is your PC Recruiter id that appears in the PC Recruiter URL.

- For example, if the PC Recruiter URL is as follows,

- http://www.pcrecruiter.net/pcrbin/default.asp?uid=import109.merwingroup, your database is 'import109' and your account name is 'merwingroup'.

- Hence, in the above example, the Database.Accountname is import109.merwingroup.

For database hosted on your server:

- If you have hosted your database on your own server, enter the Database.Accountname as database.txt, where database is the database name that appears on the PC Recruiter Login screen.

Rollup List:

- Click the **Get Rollup lists for this database** button.

- Your Rollup List is displayed.

- Select your Rollup ID from the list and click **Next**.

The message **'Login Successful'** is displayed in the **Status** area and the dialog box moves to the **Dupe Check Options.**

> Once you have associated AddressGrabber with a database, you can transfer addresses to the selected database only. If you want to transfer to another PCR database, you need to purchase a new License Key.

5.1.2. Check for Duplicates

You can setup the duplicate check to avoid transferring duplicate contacts to PC Recruiter. AddressGrabber provides various options to handle the duplicate contacts.

Click **Dupe Check Options** tab to define the duplicate check criteria.
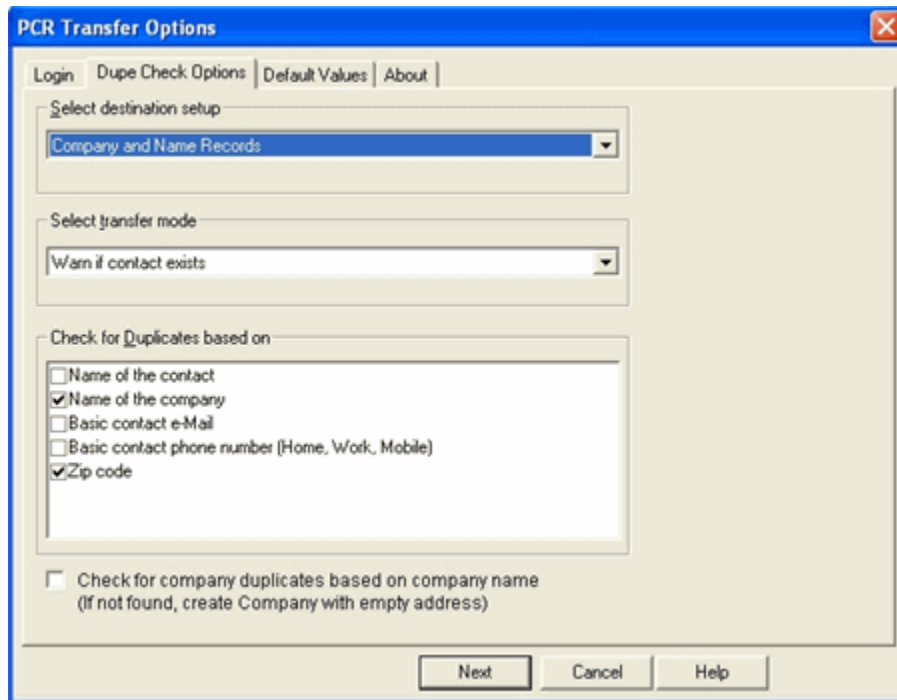
Figure 29: Check for Duplicates - PCR

Under **Destination Setup**, select the type of the Contact Record to which you want to transfer the address details.

Option	Function
Company Records	The contact transferred is saved as a Company Record.
Name Records	The contact transferred is saved as Individual Record.
Company and Name Records	Contact is saved as both Company and Individual Record. This option is selected by default.

Under **Select transfer mode,** select the required method to transfer duplicate contacts.

Method	Function
Add as new	Adds the duplicate contact as a new contact to your database
Update if contact exists	Updates the existing contact in your database
Warn if contact exists	Shows a Contact Linker dialog box that displays different options to handle the duplicate contact. This method is selected by default.
Skip if contact exists	Cancels transferring the duplicate contact to your database.

Under Check for duplicates in Contact based on, select the fields for which the values to be checked for duplicates. The values of the fields selected here are checked during the transfer process. These options are enabled when you select any of the transfer modes except **Add as new.**

Select field...	To check for...
Name of the contact	Values of the first name and last name fields in the transferred address. This option is selected by default.
Name of the company	Value of the company field in the transferred address. This option is selected by default.
Basic contact e-Mail	Email address of the contact in the transferred address. This option is selected by default.
Basic contact phone number [Home, Work, Mobile]	Phone number of the contact in the transferred address.
Zip code	Zip code of the contact in the transferred address.

Check for Company duplicates based on company name: This option is applicable only for the Company records. When this checkbox is selected, the Company records are checked for duplicates based on the Company Name only. If this option is not selected, then duplicate check is performed based on Company Name and City.

The Company Names are linked or created based on the following scenario:

Context	If checkbox is selected	If checkbox is not selected
Company Duplicate Check Criteria	Based on Company Name only.	Based on Company Name and City.
Company already exists	Link the incoming record to the existing Company Name.	Link the incoming record to the existing Company Name.
Company not found	Create a Company with empty address details and link the incoming record to the newly created Company Name.	Create a Company with incoming address details and link the incoming record to the newly created Company Name.
Two or more companies exist with same name	Link the incoming record to the first matching company.	Link the incoming record to the first matching company.

If the checkbox is not selected and a contact is transferred with different address details, the record is transferred as follows:

- If the incoming City matches the existing Company record,

  - Company details are updated with the incoming record.

  - A new Contact is created under the existing Company Name.

- If the incoming City is different from the existing record,

  - A new Company is created with the incoming details.

  - A new Contact is created and linked to the newly created Company.

The duplicate check setup works based on the combination of selected fields. That is, if you have selected the Name and Email fields to check for duplicates, then the check is performed using AND condition. Hence, even if one field is not matching the existing data, it is not considered as duplicate and transferred to PCR database as a new record.

In addition, if the incoming field is empty, then the duplicate check is performed based on the other fields excluding the empty field. However, if the existing record has an empty field and the incoming record contains value for that field, then the incoming data is not considered as duplicate and transferred as new record.

Consider the following example: (Assume that Name and Email are selected to be checked for duplicates).

Incoming Record	Existing Record	Transfer Process
William Stevenson william@egrabber.com	William Stevenson william@egrabber.com	Here the incoming values exactly match the existing values and hence the incoming record is considered as duplicate.
W. Stevenson william@egrabber.com	William Stevenson william@egrabber.com	Here, although the email ID matches, the name seems to be different. Hence, the incoming record is not considered as duplicate and transferred to PCR as a new record.
William Stevenson ----	William Stevenson william@egrabber.com	Here, the incoming email ID is empty. Hence, the email field is not considered for the duplicate check process. The check is performed only for the Name. Since the name matches, this record is considered as duplicate.
William Stevenson william@egrabber.com	William Stevenson ----	Here the existing email ID is empty. However, the incoming record contains both name and email ID. This is not considered as duplicate and added as a new record.

If you have selected Name and Phone as the fields to be checked for duplicates, the Work Phone, Home Phone and the mobile numbers are checked for duplicates. In this case, the Phone numbers are checked using the OR condition. That is out of the three phone numbers available for a contact, even if one number matches exactly, it is considered for the overall duplicate check.

Consider the following example: (Assume that Name and Phone are selected to be checked for duplicates).

Incoming Record	Existing Record	Transfer Process
William Stevenson Work: (408) 826-7777 Home: (408) 735-1234	William Stevenson Work: (408) 826-7777 Home: (408) 735-2244	The incoming Name and Work Phone match exactly. Although the Home Phone is different, the record is considered as duplicate. (Within the phone numbers, even if one number matches, it is considered for duplicate check.)

After selecting the appropriate options, click **Next** to save the settings and the dialog box moves to add default values.

5.1.3. Add Default Values

You can assign default values to the **Company** field in PCR database.

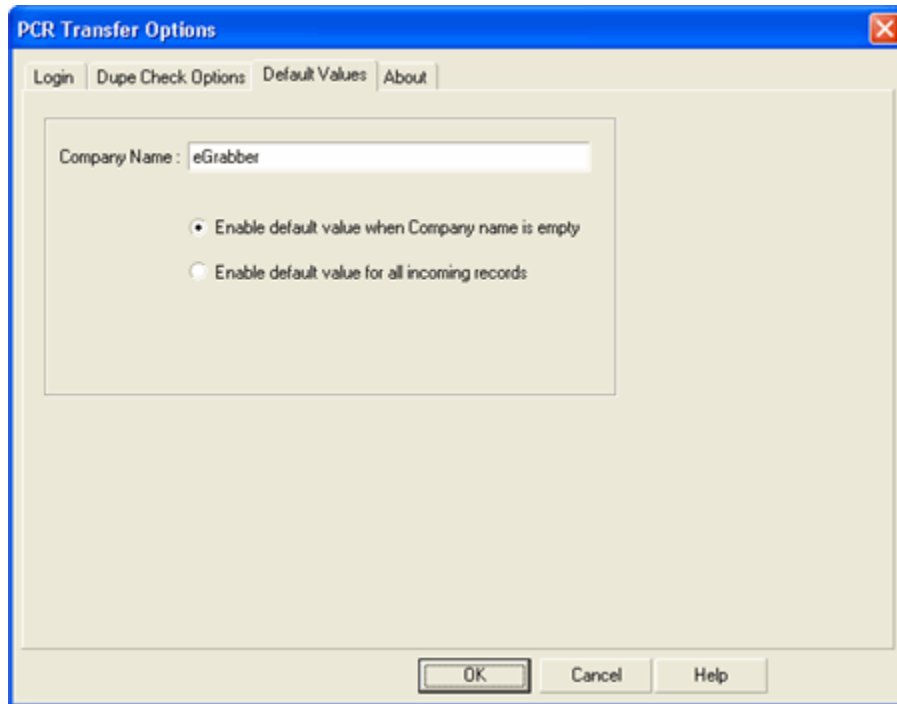Click **Default Values** tab to assign the pre-defined values.

Figure 30: Add Default Values

In the **Default Values** tab, enter a value for the **Company Name**. Whenever a record is transferred, the default value is saved in the company field based on the following options:

- **Enable default value when Company name is empty:** Select this option to transfer the default value when the **Company** field is empty in the incoming record. This option is selected by default.

- **Enable default value for all incoming records:** Select this option to transfer the default value whenever a record is transferred. Here even if the incoming record contains value for **Company** field, the default value is transferred to PCR database.

Click **OK** to save the settings.

5.2. Transfer into PC Recruiter

To transfer the contact:

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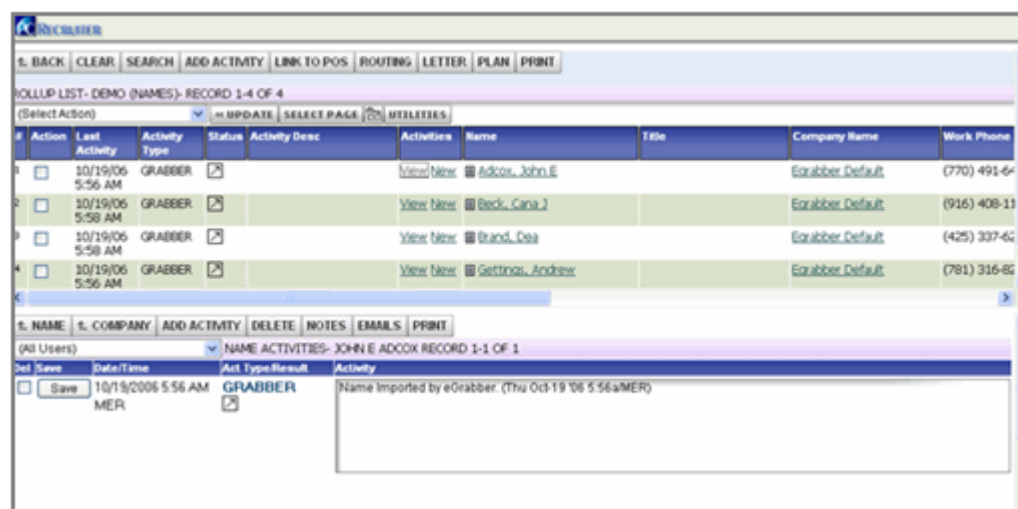- The Contact is transferred into PCR database.

Figure 31: Contact transferred to PCR

6. Transfer using Big Biller

You can transfer your addresses into Big Biller - the online Address Management System. You need to have already setup an account with Big Biller.

You can use Big Biller as destination only.

6.1. Setup Transfer Options for Big Biller

You can setup the following transfer options for Big Biller.

- Login to Big Biller
- Setup to transfer from or to different address sections, i.e., Home /Business / Both.
- Check for Duplicates.

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

6.1.1. Login to Big Biller

In the **Big Biller Link Options** dialog box, enter the following details in the **Login** tab:

Figure 32: Login to Big Biller

- **Email Address**: Enter the email ID used to login to Big Biller.

- **Password**: Enter the Big Biller account password.

Click Login and wait till the **"Login successful"** message appears in the **Status** area.

Remember Password: Select this checkbox to save the password in your system so that you need not provide the details each time you are transferring to Big Biller.

Click **OK** to save the settings.

6.1.2. Setup to Transfer In

You can customize AddressGrabber to add an individual contact or company-contact record. Further you can transfer contact address to the work address, home address, or both sections of the contact record in Big Biller.

In the **Big Biller Link Options** dialog box, click the **Transfer In** tab.
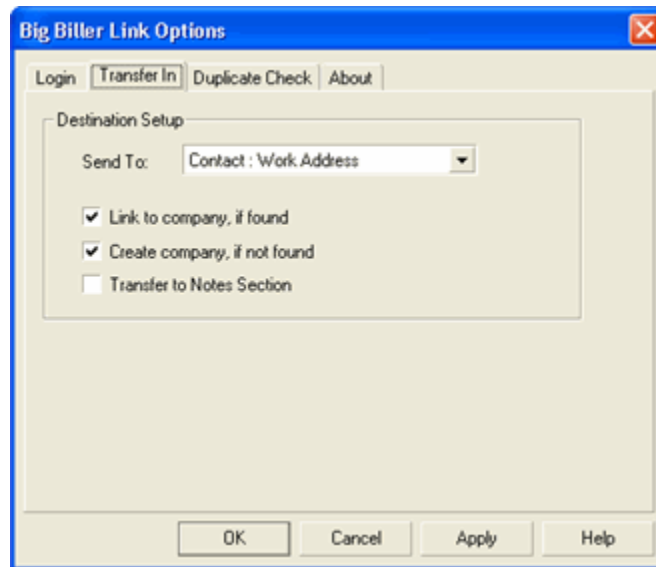
Figure 33: Setup to Transfer In

- In **Send To:** drop down list, select

  - **Contact: Work Address**, to transfer to the Work section.

  - **Contact: Home Address**, to transfer to the Home section.

  - **Contact: Work and Home Address**, to transfer to both the sections.

- Select **Link to Company**, **if found** checkbox to link the contact details to the existing company, if found. This option is selected by default.

- Select **Create Company**, **if not found** checkbox to create a new company, if not found and transfer the contact details.

- Select **Transfer to Notes** Section checkbox to save the captured contact information in the 'Notes' section of Big Biller database.

Click **OK** to save the settings.

6.1.3. Check for Duplicates in Big Biller

You can setup the duplicate check to avoid transferring duplicate contacts to Big Biller. ListGrabber provides various options to handle the duplicate contacts.

In the **Big Biller Link Options** dialog box, click the **Duplicate Check** tab to define the duplicate check criteria.
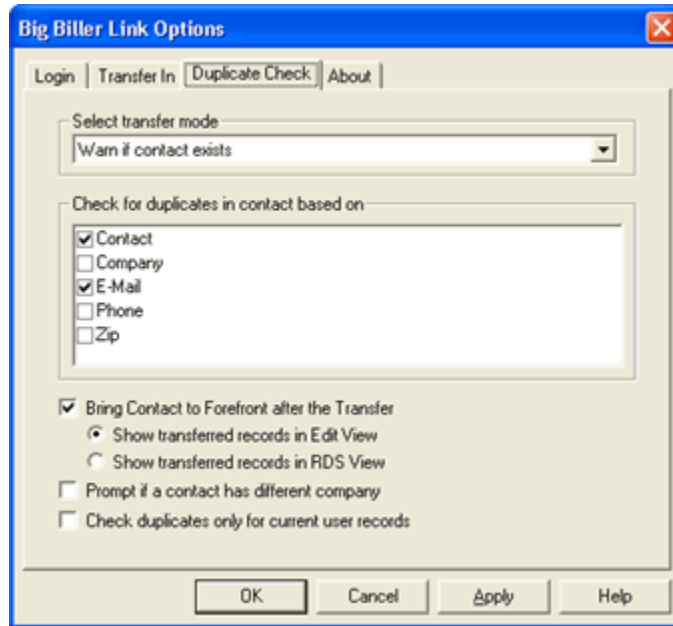
Figure 34: Big Biller – Duplicate Check Setup

Under **Select transfer mode**, select the required method to transfer duplicate contacts.

Method	Function
Add as New	Adds the duplicate contact as a new contact.
Update if contact exists	Updates the existing contact.
Warn if contact exists	Shows a Contact Linker dialog box that displays different options to handle the duplicate contact. This method is selected by default.
Cancel if contact exists	Cancels transferring the duplicate contact.

Under **Check for Duplicates based on**, select the fields for which the values to be checked for duplicates. The values of the fields selected here are checked during the transfer process.

Select field...	To check for...
Contact	Values of the first name and last name fields in the transferred contact. This option is selected by default.
Company	Value of the company field in the transferred contact. This option is selected by default.
Email	Email address of the contact. This option is selected by default.
Phone	Phone number of the contact.
Zip	Zip code of the contact.

Bring Contact to Forefront after the Transfer: Select this checkbox to view the transferred contact.

- **Show transferred records in Edit View:** Select this option to view the transferred contact in the Edit mode of Big Biller. This option is selected by default.

- **Show transferred records in Edit View:** Select this option to view the transferred contact in the Resume data Sheet view of Big Biller.

Prompt if a contact has different company: Select this checkbox to get a message when the incoming contact has a different company with other details remaining the same. A Contact Linker dialog box appears with different options to handle the duplicate contact.

Check duplicates only for current user records: Select this checkbox to search for duplicates only in the current user database. If this option is not selected, the duplicate check is performed for all the user database.

> The above option is applicable only if the current user has the permission to view other users' database. Otherwise, irrespective of the above option being selected or not, duplicate check is performed for the current user only.

Click **OK** to save the settings.

Contact Linker for Big Biller

While transferring to Big Biller, if the incoming contact is already found in the database, but with a different company name, the following dialog box is displayed.
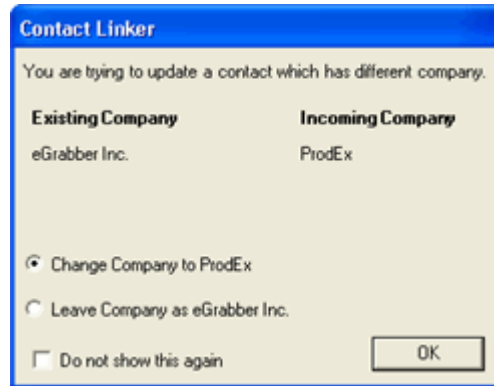

Figure 35: Contact Linker – Big Biller

You are prompted to select between two options:

- **Change Company to "Incoming Company Name"**: The contact is linked to the incoming Company Name.

- **Leave Company as "Existing Company Name"**: The existing Company Name is retained. (That is the existing record is not modified).

Select the appropriate option and click **OK** to proceed.

Do not show this again: Select this checkbox to disable the dialog box being displayed. When this option is selected, the contact is automatically linked to the incoming Company Name without displaying the above message.

> The above option can be enabled again by selecting the **Prompt if a contact has different company** checkbox in the duplicate check setup.

6.2. Transfer into Big Biller

To transfer the contact:

- Highlight the contact information to be transferred.

- Click the Big Biller 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 Big Biller.

Figure 36: Address transferred to Big Biller

After transferring the address, the Big Biller database is displayed with the last transferred contact details.

While transferring, if more than one Company is found in the database with different contact details, then the incoming contact is not linked to any of the companies.

7. Transfer using Microsoft Outlook

You can transfer addresses using the following versions of Outlook.

- Outlook 2007 / 2003 / 2002 / 2000

You can use Outlook as both source and destination.

7.1. 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.

7.1.1. Setup to Transfer In

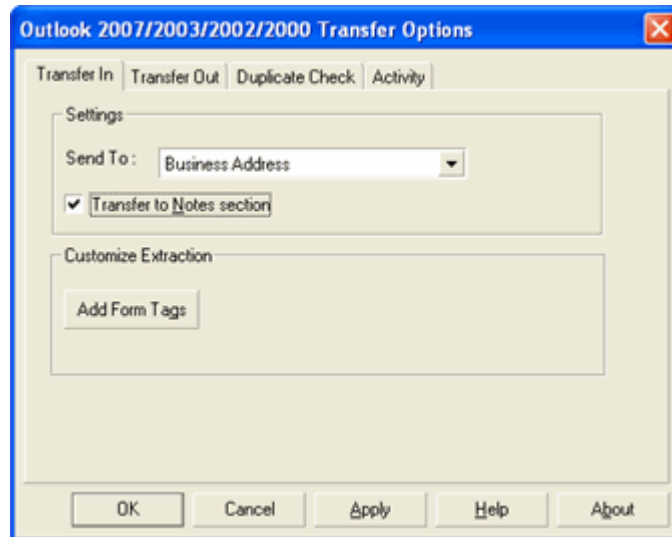In the **Link Options** dialog box, click the **Transfer In** tab.

Figure 37: 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 for more details on mapping web form tags.

Click **OK** to save the settings.

7.1.2. Setup to Transfer Out

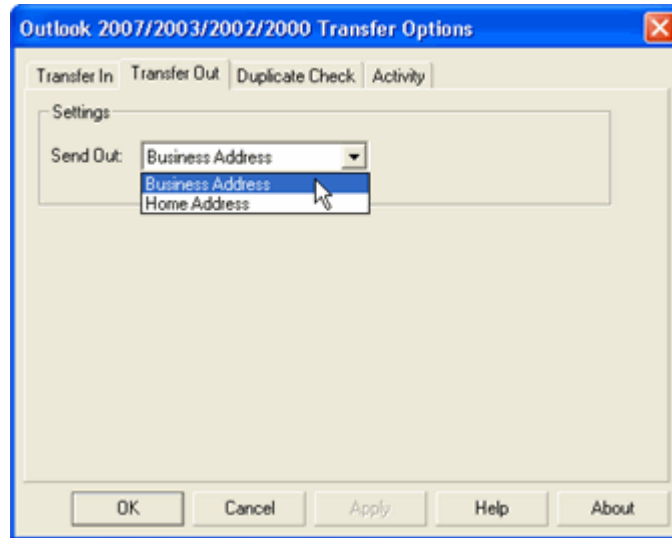In the **Link Options** dialog box, click the **Transfer Out** tab.

Figure 38: 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.**

7.1.3. Setup to check for duplicates

You can check for duplicate records while transferring to Outlook.

In the **Link Options** dialog box, click the **Duplicate Check** tab.

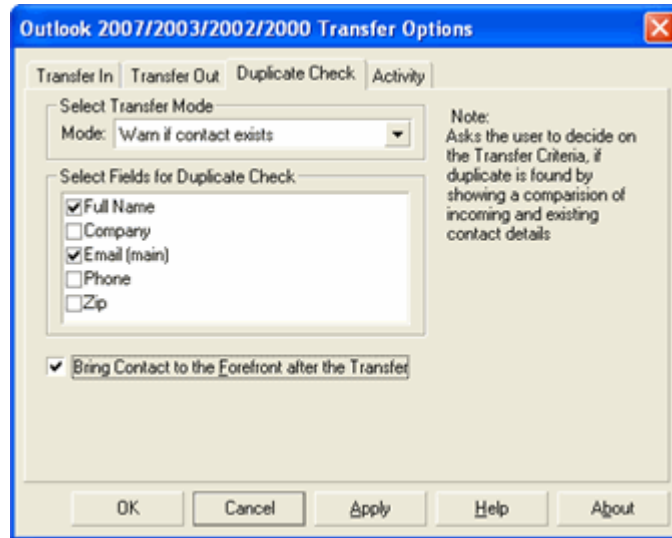Select the Transfer Mode and the fields to be checked for duplicates.

Figure 39: 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:
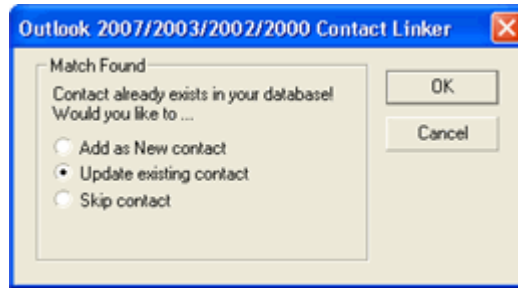
Figure 40: Contact Linker – Outlook

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** to save the settings.

7.1.4. 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.

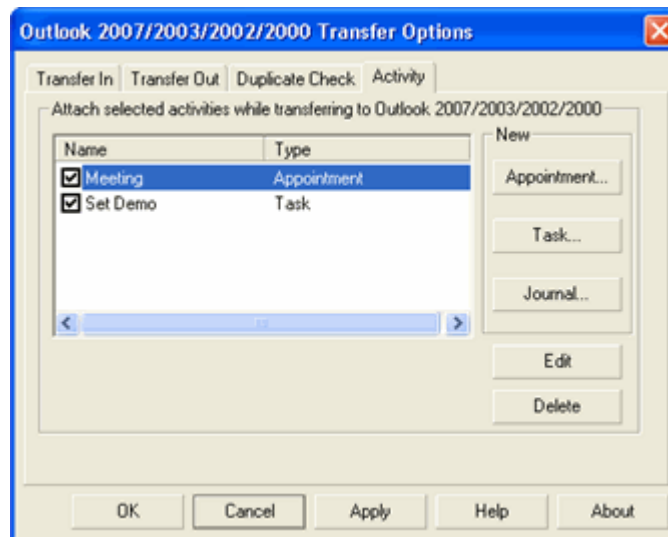In the **Link Options** dialog box, click the **Activity** tab.

Figure 41: Outlook - Schedule Activity

7.1.5. 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.

To attach an Appointment:

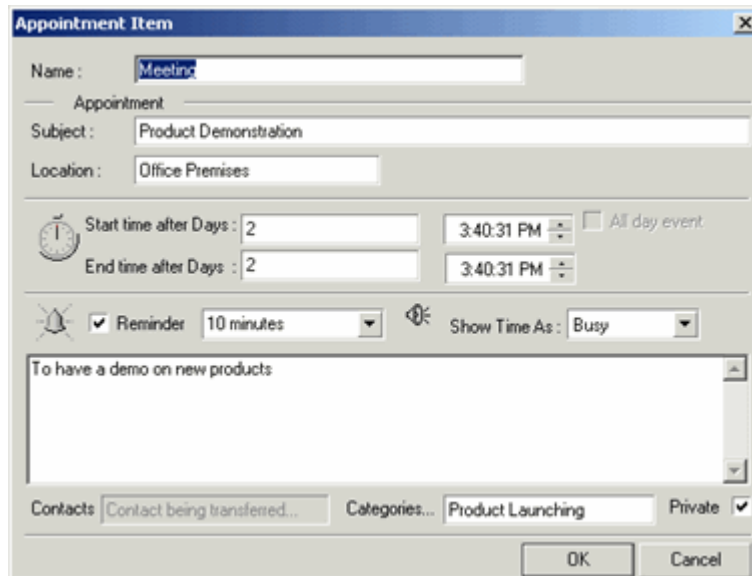Click **Appointment** in the **Activity** tab.

Enter the following details:

Figure 42: Attach Appointment in Outlook

Name: Enter the Appointment name related to your contact.

Subject: Enter a short description.

Location: Enter the location.

Start Time after days: Enter the number of days counting from the present day when you want to perform this particular activity. For Example, if you enter 30 days then it executes the activity only on the 30th day counting from the present day.

End Time after days: Enter the duration time when you want the appointment to end for that contact. For Example, if you enter 40 days then it ends the activity only on the 40th day counting from the present day.

Reminder: Select this option and set the time duration you want the reminder to occur before the appointment.

Show Time as: Select from the list to view your appointment time as Busy/ Free/ Tentative or Out of Office. This enables others to view your appointment time as specified, when transferred to Outlook.

Enter a detailed description of your activity in the space provided.

Categories: Specify a category related to your Appointment. You can specify an item from the Master Category List supplied by Outlook or you can enter a new category specific to the activity.

Private: Select this option to make your Appointment private.

Click **OK** to save the Appointment.

To attach a Task:

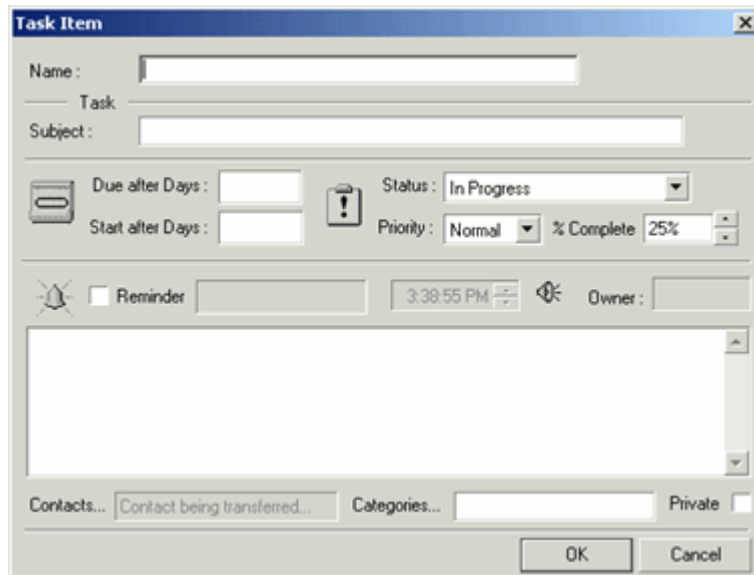Click **Task** in the **Activity** tab. Enter the following details:

Figure 43: Attach Task in Outlook

- **Name**: Enter the name of the Task Item.

- **Subject**: Enter a short description of the Task.

- **Due after days**: Enter the duration time you want the task to end for that contact. For Example, if you enter 40 days then it ends the activity only on the 40th day counting from the present day.

- **Start after days**: Enter the number of days counting from the present day when you want to perform this particular activity. For Example if you enter 30 days then it executes the activity only on the 30th day counting from the present day.

- **Status**: Select the status as **Completed/In Progress/Not Started/Waiting for Someone else/Deferred** related to your task.

- **Priority**: Select the priority as **High/Low/Normal** relevant to the task.

- **%Complete**: Specify the percentage of progress related to the task.

- **Reminder**: Select this option and set the date and time when you want Outlook to remind you about the task.

- **Enter** a detailed description of your task.

- **Categories**: Specify a category related to your Task. You can specify an item from the Master Category List supplied by Outlook or you can enter a new category specific to the activity.
- **Private**: Select to make your task entry private.
- Click **OK** to save the Task.

As you transfer records to Outlook, this Task is attached to the transferred contact.

To Attach a Journal:

Click **Journal** in the **Activity** tab.

Enter the following details:

Figure 44: Attach Journal in Outlook

Name: Enter a name for your Journal entry.

Subject: Enter short description related to your Journal entry.

Entry Type: Select the entry that is related to your contact from this list.

Start Time after days: Enter the number of days counting from the present day when you want to perform this particular activity. *For Example, if you enter 30 days then it executes the activity only on the 30th day counting from the present day.*

Duration: Select the time duration required to execute the activity.

Enter a detailed description for the journal entry in the space provided below Duration**.**

Categories: Specify a category related to your Journal Entry. You can specify an item from the Master Category List supplied by Outlook or enter a new category.

Private: Select to make your journal entry private.

Click **OK** to save the Journal.

The name of the activity is displayed under **Attach selected activities while transferring to Outlook 2007/2003/2002/2000.** 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 2007/2003/2002/2000.**
- Click **Edit** and make changes in the Settings.
- Click **OK.**

To delete an activity:

- Select the activity.
- Click **Delete.**
- Click **OK.**

7.2. 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**.

7.3. 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**.

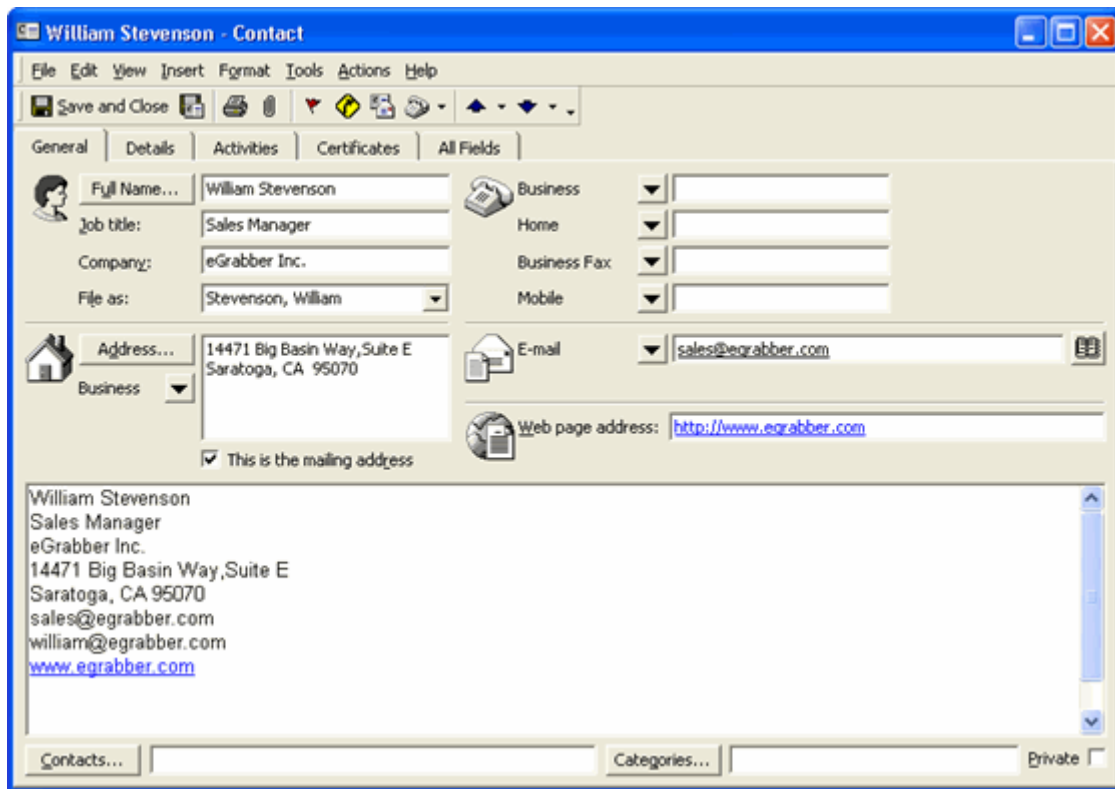- The Contact is transferred into Outlook Address Book.

Figure 45: Contact transferred to Outlook

Ensure that Outlook is open.

8. Transfer using Microsoft Excel

You can transfer addresses using Excel 2007/2003/2002/2000.

You can use Excel as destination only.

8.1. 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.
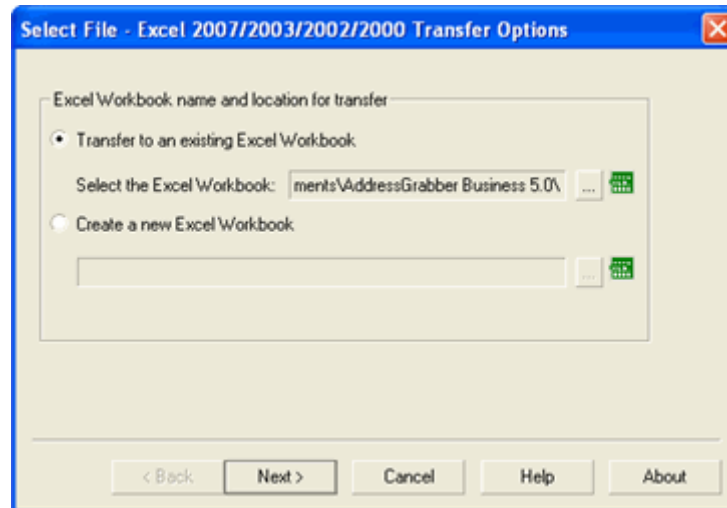
Figure 46: Excel – Select / Create a File

8.1.1. 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.

8.1.2. 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.
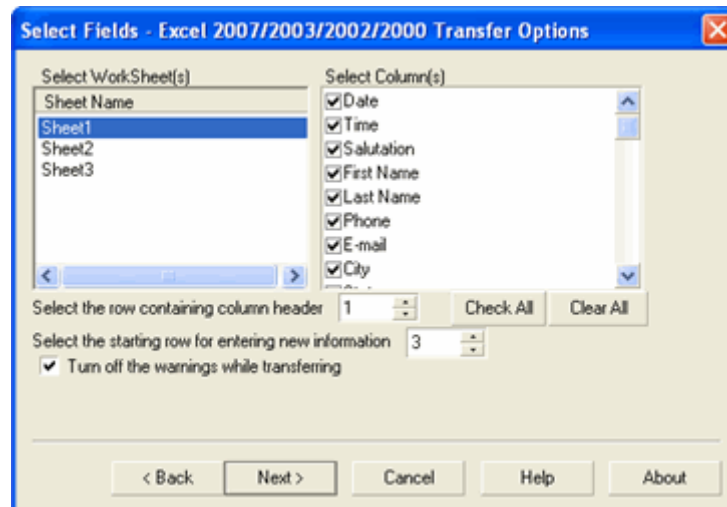
Figure 47: Select Excel Fields

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 [Map Fields](#).

8.1.3. 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.

8.1.4. 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.
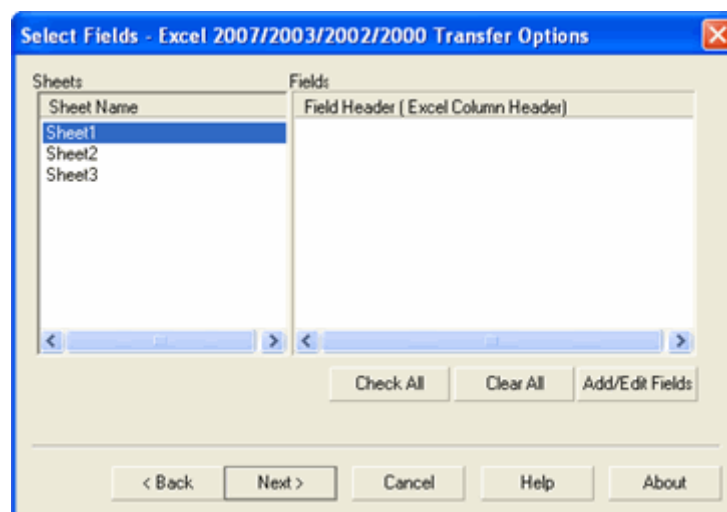
Figure 48: Create Excel Fields

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.
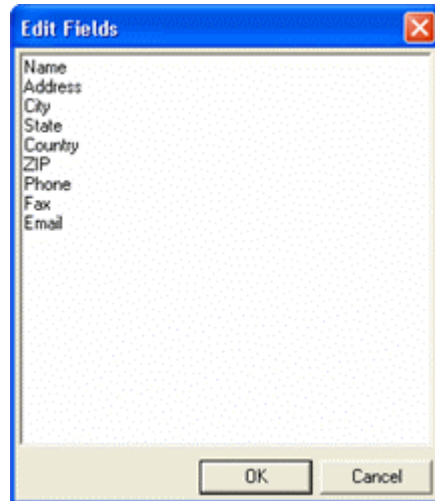
Figure 49: Add / Edit Excel Fields

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.

8.1.5. 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.
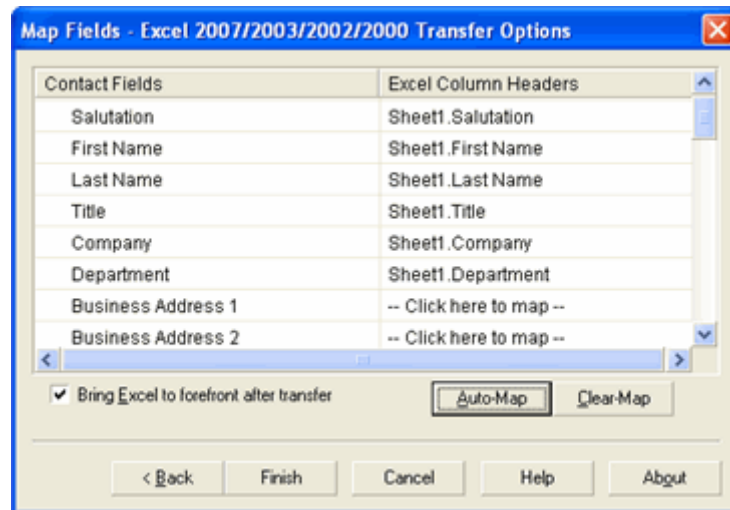
Figure 50: Map Excel Fields

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.

8.2. 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.

Figure 51: Contact Transferred to Excel

Ensure that Excel file is open.

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.
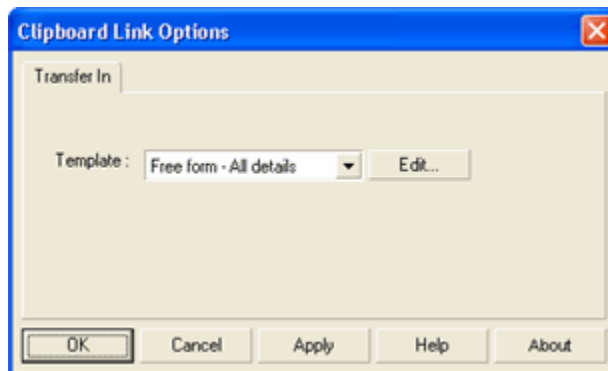

Figure 52: Clipboard Link Options

- Select a template from the **Template for RTF format** list and click **OK**.

- Click **Edit** to create a new template.

- Click **OK**.

Refer Templates 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.

10. Templates

You can create templates to transfer addresses using Clipboard.

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

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

In the **Link Options** dialog box, Click **Edit.**

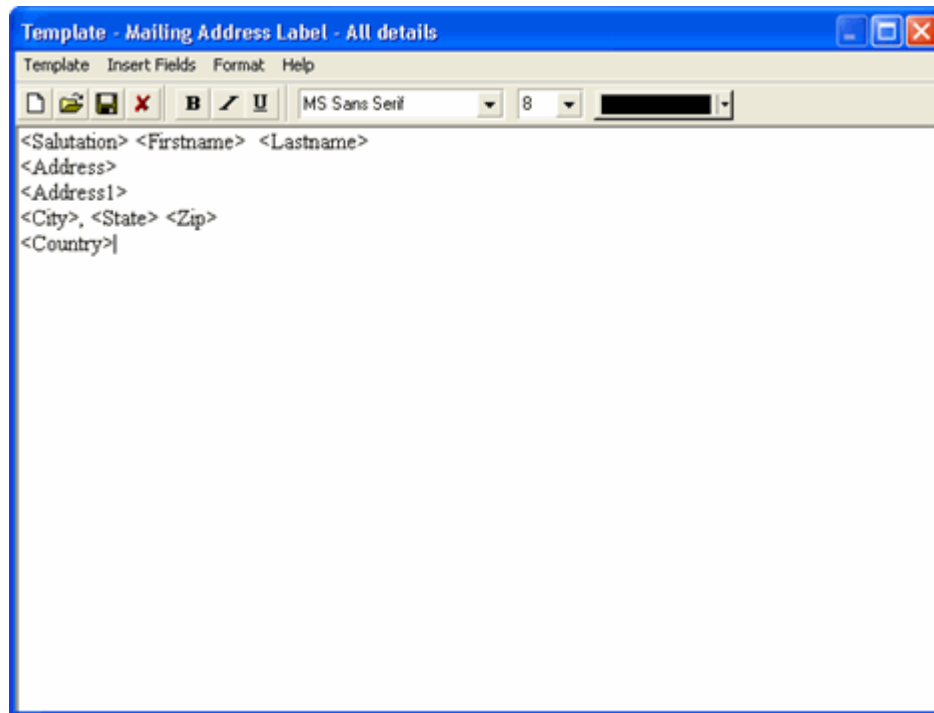You can create, edit, and delete templates here.

Figure 53: 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 54: Template Fields supported

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

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