# 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
Ľ.	Note: Important or supplemental information.
9	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.

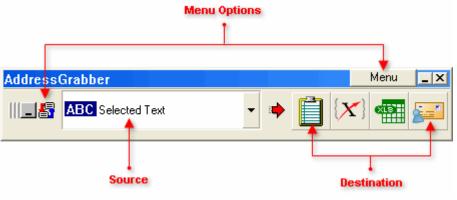


Figure 1: AddressGrabber Toolbar

 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.

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 <b>eGrabber Product Registration</b> 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 following table describes the options available in the Menu:

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.

AddressGrabber Options - Source Links	
Options   Source Links   Destination   Inks   Miscellaneous	<u>Ω</u> k <u>C</u> ancel <u>H</u> elp
Customize Extraction	

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.

AddressGrabber	Options - Destination Links	
Options Source Links Destination Links Miscellaneous Customize Extraction	CardScan 7.05   P Excel 2007/2003/2002/2000   P My Address   P Outlook 2007/2003/2002/2000   P PC Recruiter   P Salesforce.com   T ext in Clipboard	<u>Q</u> k <u>C</u> ancel <u>H</u> elp

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.

AddressGrabbe	r Options - Miscellaneous	
AddressGrabbe	r Options - Miscellaneous         Address Extractor Setup         Confirm extraction results before sending         Left mouse click on Tray icon should         Toggle Toolbar between Show and Minimize         Capture Address         Startup Settings         Do not show Splash screen on Startup         Transfer Log         View       Delete	<u></u> <u></u> ancel <u></u> <u>H</u> elp
Links	Transfer Log View Delete	

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 <u>Chapter 3</u> 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.

 $rac{1}{3}$  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.

AddressGrabber Options - Customize E	Extraction	
AddressGrabber Options - Customize E Options Use Form Fields Use Use Use Use Use Use Use Remove E-mail Header Add/Hide Application	Setup Form Fields Text Removal Add Keywords	Qk Qancel Help

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.

Setup Form Fields			
Step 1: Select form fields extraction meth The Setup Form Fields Wizard helps you customize Address& This wizard will take you through the steps of mapping the dat	abber to transfer Web Forms into your Destination Application.		
Form Field Entry     Auto - Extract Mode     Manual Mode     Preview / Edit Existing Settings	Description: Use the Auto Extract Mode if you want the wizard to automatically extract the Form Fields from your Web Form.		
Click here to quickly learn how to capture and transfer sample Web Forms.			
	< Back Next > Cancel Help		

Figure 6: Select form fields extraction method

#### Click Next.

#### Step 2: Paste your form

Paste or type your web form in the space.

Setup Form Fields	
Step 2: Paste your form below The Web Form pasted here must be similar to those you wish to transfer with AddressGrabber.	
Consultant: Chip Fudge Address: 151 South Locust Hill Dr 604 City: Lexington State: KY Zity: 40517 Day Phone: 513-616-0010 E ve Phone: 659-268-0899 Email: jbrach@uky.edu How long looking: Less Than One Month Source: Franchisechoices	
<u>x</u>	>
< Back Next> Cancel	Help
Caricel	Пор

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.

Setup Form Fields
Step 3: Select field separator on your form
The field separator is automatically displayed here. If it has not been detected, enter the separator in the edit box.
Field separator for form =
< Back Next> Cancel Help

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.

Address	Grabber Info 🛛 🛛 🕅
٩	Map field names automatically?
	Yes No

Figure 9: Message box to map fields

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

Edit Form Fields	Map Automatically	Clear Mapping		
Form Fie	lds	Application Fields		Values
Consultant:	Cik	k here to map Consultant:		= Chip Fudge
Address:	Ad	dress		= 151 South Locust Hill Dr 604
City:	City	(		= Lexington
State:	Ste	te		= KY
Zip:	Zip	1		= 40517
Day Phone:	Cik	k here to map Day Phone:		= 513-616-0010
Eve Phone:	Cik	k here to map Eve Phone:		= 859-268-0899
Email:	Em	ai		= jbrach@uky.edu
How long looking:	Clic	k here to map How long look	ing:	= Less Than One Month
Source:	Clic	k here to map Source:		= Franchisechoices

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 lcons 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.

Setup Form Fields		X
Step 2: Enter form f	fields Ir Web Form along with the field separator.	
Form Field Names	See example below	
Customer Name: Email: Phone: Country: ZIP:	<ul> <li>Example</li> <li>Customer Name : William Stevenson Phone Number : (408) 872-3103 E-mail : sales@egrabber.com form fields + separator Form Field Name</li> <li>The Form Field Names must be entered in the following format</li> <li>Customer Name : Phone Number : E-mail :</li> </ul>	
	< Back Next> Cancel Help	

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.

etup Form Fields							
	n fields in form to A Fields individually or have the Map Automatically	y mappe	d by cli	cking "Map	Automatica	M.	
	Form Fields			Appl	cation Field	s	
Customer Name:		Compan	Y			-	
Emailt		Email					
Phone:		Phone					
Country:		Country					•
ZP:		Country Dept. Email Email 1 Ext Ext First Nar Job Title Last Nar Mobile Name	ne	~			
		< Back		Finish	Can	cel	Help

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 lcons 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.

ield's value is not found in the Web F	orm.	
Field Names		Edit form field names.
Salutation	Last Name	(One form field name per line )
Name	is mapped to	LastName
First Name		Last_Name
Last Name		
Job Title		
Company		
Dept.	~	
Address		
Address 1		
City		~
State		< >
Zip		Enter Default Value
Country		
Phone	<u>-</u>	Transfer Default Value

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.

Setup Form Fields Into Outlook 2007/2003/2002/2000				
He	ep 2: Preview / Edit field names and so re you can add new Form Field Names or edit existing on d's value is not found in the Web Form.			Destination : 💴
0.	tlook 2007/2003/2002/2000 Field Names			Edit form field names. (One form field name per line )
Pa	iger	-	Referred By	
R	eferred By		is mapped to 🗾	website
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			
S	elect User Fields			~
S	elect User Fields			< >
S	elect User Fields			Enter Default Value
S	elect User Fields			
2	alect Liser Fields	-		Transfer Default Value
		[	< Back Finish	Cancel Help

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.

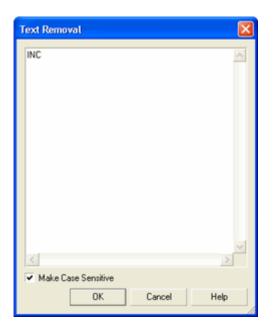


Figure 15: Text Removal

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 Ireeves@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.

Add Keywords Setting	5	
Associate Keywords For F Field Names	ield Names Enter Title Key	Words
Salutation	RAC	~
First Name		
Last Name		
Title		
Company		
Division		
Address		
Address 1		
City		
State		
Country		
		~
	<	>
	OK Canc	el Help

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.

AddressGrabber	Options - Format Contact E-mail Address Address1 City Company Country Department First Name Job Tite Last Name Name Salutation State Web Site	Case • None Upper Cower Sentence Upper/Lower Mode • None • Spand • Abbreviate	Qk Çancel Help
Format Add/Hide Application	Preview 14471 Big Bas	rin Way,Suite E	

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

Contact E E-mail E-mail	E-mail Format None Firstname Lastname Lastname, Firstname E-mail
Preview	william@egrabber.com

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.

AddressGrabber	Options - Add/Hide Application	ns	X
Options Customize Extraction Format Add/Hde	Available Applications: CardScan 7.0.5 Excel 2007/2003/2002/2000	Selected Applications: Outlook: 2007/2003/2002/200 PC Recruiter $\{\chi \}$ Salesforce.com	<u>Ω</u> k <u>C</u> ancel <u>H</u> elp
Applications My Address	Add >>	/ Hide Applications >>	

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.

Options	Personal		_	Address				1.1	01	r
Autor Mechanist C	First Name	jwiliam		14471 Bi	ig Basin '	Way,	Suite E		<u>0</u> k	ļ
	Last Name	Stevenson							Cancel	Į.
A.	Job Title	Sales Manager							Help	
Format	Company	eGrabber Inc.		City	Saratog	ga				
	Phone			State	CA	Zip	95070			
Add/Hide	Fax			Country	USA					
Applications	Mobile			E-mail	sales@	egra	bber.com			
AB	Pager			Web Site	www.e	grabt	per.com			
My Address	New		Sa	ve			Delete			
O.E.M.	Set this a	address as default		Select Cor	ntact W	illiam	Stevensor 👻	i I		

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:

Address	irabber Parse Result			
Salutation	First Name	Last	Name	Destination: 🕅
	William	Stev	enson	
Contact	User Fields Transfer In Format			
Company	eGrabber Inc.	Phone		Ext
Job Title	Sales Manager	Phone1		Ext
Dept.		Fax		
Address	14471 Big Basin Way,Suite E	Mobile		
		Pager		
City	Saratoga	E-mail	sales@egrabber.	com
State	CA	E-mail1	william@egrabber	.com
Zip	95070 Country USA	Web Site	www.egrabber.co	m
Verity A	ddress	Т	ransfer to Lead	
	rm Fields 🔽 Use Format Options			Settings 🛛 👻
Saratoga,	ager nc. Basin Way,Suite E			~
	Iransfer	Cancel	Parse Again	Help

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.

Address Verification Request
Pollowing is the Original Address:
COMPANY: eGrabber Inc. ADDRESS: 14471 Big Basin Way,Suite E
: CITY : Saratoga STATE : CA ZIP : 95070
Below is the correct ZIP+4 code for the original address
Official Postal Format
COMPANY: EGRABBER INC. ADDRESS: 14471 BIG BASIN WAY STE E
CITY : SARATOGA
STATE : CA ZIP : 95070-6182
Apply USPS format (UPPER CASE)
Do you want to replace the original address?
Yes No

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 <u>Chapter 2</u> 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 <u>Chapter 2</u> 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 <u>Format Options</u> 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.

La 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 lcon is not available in the Toolbar, add the lcon by using the Add/Hide Applications window.

#### 4.1.1. Login to salesforce.com

In the Link Options dialog box, click the Login tab.

Salesforce.co	m Contact Link	er		×
Login Trans	fer In Duplicate Ch	heck		
User Name :	william@egrabber.c	com		
Password :	*****			
	Login			
Status :	Logged in success	fully		
Remember	r Password			
	rd will not be saved assword, please se			
OK	Cancel	Apply	Help	About

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.

Salesforce.com Contact Link	er	
Login Transfer In Duplicate Ch	neck	
Transfer to Lead Account / Contact		
Lead Information		
Lead Status :	Open - Not Contacted	•
Lead / Account Information		
If company is empty assign	<blank></blank>	•
Contact / Account Information	ess to Contact. Mailing Address Idress to Contact. Other Address	
Show record in Salesforce.		
OK. Cancel	Apply Help	About

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.

Salesforce.com Contact Linker	×
Login Transfer In Duplicate Check	
Lead Information Select transfer mode	
Warn if duplicate exists 💌	
NOTE: Asks the user to decide on a Transfer mode, if a duplicate is found.	
Select fields to check duplicates	
✓Lead:Name ✓Lead:Company □Lead:Email □Lead:Phone □Lead.Zip	
OK Cancel Apply Help Abou	

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.

Salesforce.com Contact Linker	×
Login Transfer In Duplicate Check	
Specify logic to use if duplicates are detected. If no duplicates are detected, ACCOUNTS and CONTACTS will be added as New.	
Warn - If duplicate ACCOUNT exists	
Select ACCOUNT fields that should match for a duplicate.	
Account:Name Account:Phone Account:Billing.City Account:Billing.Zip	
Specify logic to use if ACCOUNT match is found (Criteria given above)	
Warn - If duplicate CONTACT exists	
Select CONTACT fields that should match for a duplicate,	
Contact:Name Contact:Phone Contact:Email Contact:Zip	
OK Cancel Apply Help About	

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.

sales force.co	Software.	My Setup   Traini	
ew Lead   New Account   Ne	ew Contact   New Opportunity   New Porecast   New Case	New Solution   New Doc	ument   New Task
Search	옷 Lead: Chip Fudge	Cust	onize Page 🕧 H
Search for keywords:			
	Edit Delete Convert	Clone Printabl	e View
Search		Discourse F.A.	0.040.0040
	Lead Owner: Pooja Karuna [Change]	Phone: 51	3-616-0010
	Lead Owner: Poola Karuna [Change] Name: Chip Fudge	Mobile:	3-010-0010
+ Advanced Search			3-616-0010
+ Advanced Search	Name: Chip Fudge	Mobile: Fax:	ach@uky.edu
+ Advanced Search Recent Items	Name: Chip Fudge Company: <blank> [Search]</blank>	Mobile: Fax:	
+ Advanced Search Recent Items L <sup>2</sup> <u>Chip Fudon</u> L <sup>2</sup> <u><blank< u=""></blank<></u>	Name: Chip Fudge Company: <8liank> [Search] Title: Consultant	Mobile: Fax Email <b>ju</b> r	ach@uky.edu
+ Advanced Search Recent Items 북 Chip Fudge 북 sBlank> 북 sBlank>	Name: Chip Fudge Company: <blank> [Search] Title: Consultant Lead Source:</blank>	Mobile: Fax Email: <b>jbr</b> Website:	ach@uky.edu
+ <u>Advanced Search</u> Recent Items 과 <u>Chip Fudge</u> 객 <u>cBlank</u> :	Name Chip Fudge Company: <blank> [Search] Title Consultant Lead Source Industry:</blank>	Mobile: Fax Email <u>Bu</u> Website Lead Status: Op	ach@uky.edu

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:

PCR Transfer Option	; · · · · · · · · · · · · · · · · · · ·	Ν		
Login Dupe Check Op	tions Default Values About			
Listener URL	https://pcrecruiter.net/pcrbin/grabber.exe	-		
User Name	admin	_		
Password	xxxxxxxxx			
Database.Accountname	odbc.resumegrabber	_		
	Get Rollup lists for this database			
(Select a Category) LAST TWENTY 0-9 A B Present last Igpro manual MRI Demo I Status Login Successful With Rolup Id: ADMIN.(	C D E F O H I J K L M N O P Q R S T U V W X Y Z ALL FLTE			
	Next Cancel Help			

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.

PCR Transfer Options
Login Dupe Check Options Default Values About Select destination setup Company and Name Records
Select transfer mode
Warn if contact exists
Check for Duplicates based on Name of the contact
Name of the company     Basic contact e-Mail     Basic contact phone number (Home, Work, Mobile)
Check for company duplicates based on company name (If not found, create Company with empty address)
Next Cancel Help

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 <u>Contact Linker</u> 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	William Stevenson	The incoming Name and Work Phone match exactly. Although the
Work: (408) 826-7777	Work: (408) 826-7777	Home Phone is different, the record is considered as duplicate.
Home: (408) 735-1234	Home: (408) 735-2244	
		(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.

PCR Transfer Options	
Login Dupe Check Options Default Values About	
Company Name : eGrabber • Enable default value when Company name is empty • Enable default value for all incoming records	
OK Cancel Help	

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.

RATER								
K CLEAR S	EARCH AD	O ACTIV	TY LINK TO POS R	OUTING LETTE	R PLAN PRINT			
LIST- DEMO (	NAMES)- RE	CORD 1-	4 OF 4					
Action)			DATE SELECT PAGE	aurumes				
n Lest Activity	Activity Type	Statum	Activity Desc	Activities	Name	Title	Company Name	Work Phone
10/19/06 5:56 AM	GRABBER	Ø		Mener Nener	B Adcox, John E		Ecrabber Default	(770) 491-6
10/19/06 5:58 AM	GRABBER	Ø		View New	Beck, Cana J		Egrabber Default	(916) 408-1
10/19/06 5:58 AM	GRADBER	Ø		View New	B Brand, Dea		Ecrabber Default	(425) 337-62
10/19/06 5:56 AM	GRABBER	Ø		View New	Gettings, Andrew		Egrabber Default	(781) 316-8
								>
E 1. COMPA	NY ADD A	CIMIY	DELETE NOTES E	AALS PRINT				
ers)		► N40	A ACTIVITIES- JOHN	E ADCOX RECOR	D 1-1 OF 1			
ave 10/19/0 MER	2006 5:56 A	⊴ GR	ABBER	e Imported by eO	rabber. (Thu Oci-19 '06 5.56	aMER)		
	LIST- DEMO ( Activity 20/19/06 5:56 AM 20/19/06 5:58 AM 20/19/06 5:58 AM 20/19/06 5:58 AM 20/19/06 5:58 AM 20/19/06	K         CLEAR         SEARCH         AD           LIST-DEMO (MAMES)         RE         Activity         Res           n         Last         Activity         Rep           n         Last         Activity         Rep           10/19/06         GRABBER         5:58 AM         20/19/06         GRABBER           5:58 AM         20/19/06         GRABBER         5:58 AM           10/19/06         GRABBER         5:58 AM	K CLEAR SEARCH ADD ACTIV LIST- DEMO (NAMES) RECORD 1 Actor) I I ACTIVITY Status Actor) I I Activity Status 10/19/06 GRABBER 2 20/19/06 GRABBER 2 5/58 AM 10/19/06 GRABBER 2 5/58 AM	K CLEAR SEARCH ADD ACTIVITY LINK TO POS R LIST- DEMO (NAMES): RECORD 1-4 OF 4 Actor) V (HUPDATE SELECT PACE) Actory Status Activity Desc Activity Status Activity Desc SCS AM 20/19/06 GRABBER 2 5:58 AM	K     CLEAR     SEARCH     ADD ACTIVITY     LINK TO POS     ROUTING     LETTER       LIST- DEMO (NAMES)- RECORD 1-4 OF 4     Activity     SELECT PAGE (2) INTELLITES       n     Last     Activity     Select PAGE (2) INTELLITES       10/19/06     GRABBER     Minum Minum       20/19/06     GRABBER     Minum Minum <td>K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES): RECORD 1-4 OF 4       Activity       SEARCH       Activity       SEARCH       Activity       Record 1-4         Activity       Status       Activity Desc       Activities       Name         10/19/06       GRADBER       Status       Activity Desc       Activities       Name         20/19/06       GRADBER       View New       Blacks., John E       View New       Blacks., John E         20/19/06       GRADBER       View New       Blacks., Cana.)       View New       Blacks., Cana.)         5:56 AM       View New       Blacks., Cana.)       View New       Blacks., Cana.)         20/19/06       GRADBER       View New       Blacks., Cana.)       View New         20/19/06       GRADBER       View New       Blacks., Cana.)       View New         20/19/06       GRADBER       View New       Blacks., Cana.)       View New       Blacks., Cana.)         20/19/06       GRADBER       View New       Blacks., Andrew       View New       Blacks., Andrew         20/19/06       GRADBER       Name Activity       Nathe Activity       Activity       Acti</td> <td>K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES)- RECORD 1.4 OF 4       Activity       SECOND 1.4 OF 4       Activity       SECOND 1.4 OF 4         Activity       Yue       WILLING       Activity Basic       Activities       Name       Tale         10/19/06       GRABBER       Minumbient       Backow       John E       Signal       Signal         20/19/06       GRABBER       Minumbient       Backow       Back       Cana J       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal       Signal       Signal       Signal       Signal       Signal       Signal&lt;</td> <td>K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES): RECORD 1-4 OF 4       Address       Address       RECORD 1-4 OF 4         Address       V       In UPDATE       SELECE PAGE       Inteleficies       Inteleficies         In       Last       Activity       Status       Activity Desc       Activities       Name       Title       Company Name         10/19/06       GRABBER       Inteleficies       Memory Name       Inteleficies       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       Inteleficies       Excluder Default       Excluder Default       Excluder Default         5:56 AM       Status       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Status       View Name       Inteleficies       Excluder Default       Exclude</td>	K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES): RECORD 1-4 OF 4       Activity       SEARCH       Activity       SEARCH       Activity       Record 1-4         Activity       Status       Activity Desc       Activities       Name         10/19/06       GRADBER       Status       Activity Desc       Activities       Name         20/19/06       GRADBER       View New       Blacks., John E       View New       Blacks., John E         20/19/06       GRADBER       View New       Blacks., Cana.)       View New       Blacks., Cana.)         5:56 AM       View New       Blacks., Cana.)       View New       Blacks., Cana.)         20/19/06       GRADBER       View New       Blacks., Cana.)       View New         20/19/06       GRADBER       View New       Blacks., Cana.)       View New         20/19/06       GRADBER       View New       Blacks., Cana.)       View New       Blacks., Cana.)         20/19/06       GRADBER       View New       Blacks., Andrew       View New       Blacks., Andrew         20/19/06       GRADBER       Name Activity       Nathe Activity       Activity       Acti	K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES)- RECORD 1.4 OF 4       Activity       SECOND 1.4 OF 4       Activity       SECOND 1.4 OF 4         Activity       Yue       WILLING       Activity Basic       Activities       Name       Tale         10/19/06       GRABBER       Minumbient       Backow       John E       Signal       Signal         20/19/06       GRABBER       Minumbient       Backow       Back       Cana J       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal       Signal         20/19/06       GRABBER       Minumbient       Back       Cana J       Signal       Signal       Signal       Signal       Signal       Signal       Signal       Signal       Signal<	K       CLEAR       SEARCH       ADD ACTIVITY       LINK TO POS       ROUTING       LETTER       PLAN       PRINT         LIST- DEMO (NAMES): RECORD 1-4 OF 4       Address       Address       RECORD 1-4 OF 4         Address       V       In UPDATE       SELECE PAGE       Inteleficies       Inteleficies         In       Last       Activity       Status       Activity Desc       Activities       Name       Title       Company Name         10/19/06       GRABBER       Inteleficies       Memory Name       Inteleficies       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Inteleficies       Inteleficies       Excluder Default       Excluder Default       Excluder Default         5:56 AM       Status       View Name       Inteleficies       Excluder Default       Excluder Default         5:56 AM       Status       View Name       Inteleficies       Excluder Default       Exclude

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.

If the Big Biller Icon is not available in the Toolbar, add the Icon by using the Add/Hide Applications window.

# 6.1.1. Login to Big Biller

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

Big Biller Link Opt	ions	
Login Transfer In	Duplicate Check About	
Credential Details		
Email Address:	william@egrabber.com	
Password:	13333	
Status:	Login Success	
	Remember password     Login	
	OK Cancel Apply He	dp

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.

The **Remember Password** option is enabled only when your login is successful.

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.

Big Biller Link Op	itions 🛛 🔀
Login Transfer In	Duplicate Check About
Destination Setup	p
Send To:	Contact : Work Address
<ul> <li>Link to co</li> </ul>	mpany, if found
Create co	mpany, if not found
Transfer t	o Notes Section
L	
	OK Cancel Apply Help

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.

Big Biller Link Options	R
Login Transfer In Duplicate Check About	
Select transfer mode	
Warn if contact exists	
Check for duplicates in contact based on	
Contact	
E-Mail	
Zp	
<ul> <li>Bring Contact to Forefront after the Transfer</li> <li>Show transferred records in Edit View</li> <li>Show transferred records in RDS View</li> <li>Prompt if a contact has different company</li> <li>Check duplicates only for current user records</li> </ul>	
OK Cancel Apply Help	

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 <u>Contact</u> <u>Linker</u> 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.

Contact Linker					
You are trying to update a contact which has different company.					
Existing Company Incoming Company					
eGrabber Inc.	ProdEx				
Change Company to ProdEx					
<ul> <li>Leave Company as eGrabber Inc.</li> </ul>					
Do not show this again	OK				

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.

Big Biller'					raining   Contact Us   L 26 3
tesume Data Sheet (RDS)				Main Menu Planner P Find   Modify Search   Peop	
	Hot Lists   Edit   Del	Notes   Attachments   Re-	sume   Email   New Activity	rind ( moonly ocaren (r cop	Record 2 of 12
Contact Information	The East Pear (Pear)		wner: Suyambu TSM		1000101111
John E. Adcox - API850853		Entered. 11/20/07 C	wrier. Suyamou row	People Status:	
				Yrs of Exp:	
Home Address Map	Work Ad			Last Contact:	
		Evans Dale Circle a, GA 30340-4810		Next Contact:	
		adcox@mindspring.com			
		0) 491-6477			
Skills, Industries & Disciplines		.,			
Skills		Industry Codes			Disciplines
		industry codes			Disciplines
Education		ducation Comments:			
	6	ducation Comments:			
Relocation Information					
Willing to Relocate: No Relocation States:	Pay Relocation Fees: No	Relocate Se	sif Only: No	Own Home: No	Travel:
Employment / Compensation Informati		011	R . 4	Concept Colored Mil	
Company	Position Title	Start	End	Current Salary: \$0 Desired Salary: \$0	
				Minimum Salary: \$0	
				CompComments:	
Current Company Details				Total Comp: \$0	
Parent:	Work Type:			Pay Rate: \$0.00	
Division:	Employed: No			Bill Rate: \$0.00	
Department:	Products:			Min Hourly: \$0.00	
Job Change:					
General Comments					
General Information					
Desired Position Title:	Po	sition Type:		Source From:	
Minimum Fee:	Needs S	ponsorship: No		Visa Type:	
Security Clearance: No		curity Code:		Assistant:	
Interviewed Br Phone: No	Interview	Interviewed By Mail: No		Interviewed In Person: No	1

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.

Transfer In Transfer Out Duplicate Check Activity Settings Send To : Business Address Transfer to Notes section Customize Extraction	×
Send To : Business Address	
✓ Transfer to <u>Notes</u> section	
- Customine Extraction	
Add Form Tags	
OK Cancel Apply Help About	۲

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.

Outlook 2007/2003/2002/2000 Transfer Options	3
Transfer In       Transfer Out       Duplicate Check       Activity         Settings         Send Out:       Business Address         Business Address         Home Address	
OK Cancel Apply Help About	J

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.

Outlook 2007/2003/2002/2000 Transfer Op	tions 🛛 🕅
Transfer In       Transfer Out       Duplicate Check       Activity         Select Transfer Mode       Mode:       Warn if contact exists       Image: Contact exists         Select Fields for Duplicate Check       Image: Company       Image: Company       Image: Company         Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company         Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company       Image: Company	Note: Asks the user to decide on the Transfer Criteria, if duplicate is found by showing a comparision of incoming and existing contact details
OK Cancel Apply	Help About

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	William Stevenson	A new contact "William Stevenson"	
14471, Big Basin Way,	14471, Big Basin Way,	is created.	
Saratoga, CA 95070, USA	Saratoga, CA 95070, USA		

(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	William Stevenson	The existing contact is
14470, Big Basin Way,	14471, Big Basin Way,	updated with the incoming contact.
Saratoga, CA 95070, USA	Saratoga, CA 95071, USA	

(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:

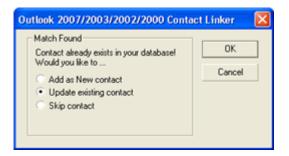


Figure 40: Contact Linker – Outlook

Add as New contactAdds the duplicate record as a new record in your database.Update existing contactUpdates an existing record with the new incoming details in your database.Skin contactCancel transferring the duplicate record to your	Select	To do
details in your database.	Add as New contact	
Skip contact Cancel transferring the duplicate record to your	Update existing contact	
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	William Stevenson	Although name of the incoming		
14471, Big Basin Way,	14471, Big Basin Way,	contact matches the existing contact, the email is different.		
Saratoga, CA	Saratoga, CA	Therefore, a new contact is created		
USA 95070	USA 95070	in your database.		
Sales@egrabber.com	Support@egrabber.com			

Robin Williams	Robin Williams	In this case, the name and e-mail
14471, Big Basin Way,	14871, Big Basin Way,	of the existing contact match the
Saratoga, CA	Saratoga, CA	incoming contact. A Contact Linker dialog box appears displaying
USA 95070	USA 95070	different options. You can select to
Sales@egrabber.com	Sales@egrabber.com	update the existing contact or add it
- 0	- 0	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.

Outlook 2007/20	03/2002/2000 Transfer Options	
	er Out Duplicate Check Activity ctivities while transferring to Outlook 2007/2	
Name	Туре	New
Meeting	Appointment	Appointment
Set Demo	Task	
		Task
		Journal
<		
,		Edit
		LOK
		Delete
-		
OK	Cancel Apply H	elp About
06	Calcal Appy H	ADOUR

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:

Appointment	Item				×
Name :	Meeting				
Appoin					
Subject :	Product Demonstration				
Location :	Office Premises				
	time after Days : 2			M 🕂 🗆 Alī da	ay event
Endt	ime after Days : 2		3:40:31 P	м÷	
- <u>)</u> 🗹 P	Reminder 10 minutes	<b>→</b> 0€	Show Time	As : Busy	•
To have a de	mo on new products				*
					*
Contacts Co	ntact being transferred	Categories	Product La	unching	Private 🔽
			[	OK	Cancel

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:

Task Item	X
Name : Task	
Due after Days :         Status :         In Progress           Start after Days :         Priority :         Normal         % Complete         25%	÷
Beminder 3.38:55 PM 🔆 Owner :	
	*
	Ŧ
Contacts Contact being transferred Categories Privat	e [
OK Cano	el

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:

Journal Entry			_		×
- Journal Entry					
Subject :					
Entry Type : Co	nversation	▼ Compa	ny:		
Start time after Da	ys: 0	3:41:06 PM	÷ [	Start Timer	1 🦳
Duration :	0 minutes		<b>v</b>	End Timer	
					*
					-
Contacts	tact being transferred	Categories			Private 🗌
				0K	Cancel

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**.

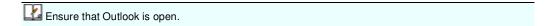
# 7.3. Transfer into Outlook

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.

💷 William Stevenson - Contact	
Elle Edit View Insert Format Iools Actions Help	
💂 Save and Close 🛃 🚳 🔋 🔻 🔣 🔛 🔹 🔺 + 🛧 - 🗸 -	
General Details Activities Certificates All Fields	
Ful Name William Stevenson Susiness	
Lob title: Sales Manager Home	
Company: eGrabber Inc. Business Fax	
File as: Stevenson, William 💌 Mobile 💌	
Address Business Addres	
This is the mailing address	
William Stevenson	
Sales Manager eGrabber Inc. 14471 Big Basin Way,Suite E	
Saratoga, CA 95070 sales@egrabber.com william@egrabber.com <u>www.egrabber.com</u>	
www.egradder.com	-
	×
Contacts Categories	Private 🗐

Figure 45: Contact transferred to Outlook



# 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 lcon is not available in the Toolbar, add the lcon by using the Add/Hide Applications window.

Excel Workbo	ook: ments\A	ddressGrabber F	Business 5.0\	🔠	
new Excel Worl	kbook				
				- 200	
		rew Excel Workbook			Excel Workbook ments VAddress Grabber Business 5.01

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.

Select Fields - Excel 2007/2003	/2002/2000 Transfer Options	×
Select WorkSheet(s) Sheet Name Sheet1 Sheet2 Sheet3 Select the row containing column heade Select the starting row for entering new i Turn off the warnings while transfer	information 3	
		-
< Back Next >	Cancel Help About	

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.

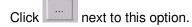
**Turn off the warnings while transferring**: Select this option to hide the warning messages during transfer.

#### 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.



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.

S	elect Fields - Excel 2007/2	003/2002/2000 Transfer Options 🛛 🛛 🕅
1	Sheets Sheet Name	Fields
	Sheet1 Sheet2	Field Header (Excel Column Header)
	Sheet3	
		< >
		Check All Clear All Add/Edt Fields
	< Back Ne	xt> Cancel Help About

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.

Salutation	Sheet1.Salutation				
First Name	Sheet1.First Name				
Last Name	Sheet1.Last Name				
Title	Sheet1.Title				
Company	Sheet1.Company				
Department	Sheet1.Department				
Business Address 1	Click here to map				
Business Address 2	Click here to map	×			
< III.	>				
Bring Excel to forefront after transfer <u>Auto-Map</u> <u>Clear-Map</u>					

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.

	A	В	С	D	E	F	G	Н	1	J
1	Date	Time	Salutation	First Name	Last Name	Phone	E-mail	City	State	Address1
2	1/12/2008	13:33:09		Dea	Brand	(425) 337-6218	dea7@comcast.net	Everett	WA	13618 55th Dr SE
3	1/12/2008	13:33:10		Tara	Buck	(757) 256-8325	tara@yahoo.com	Valley Village	ĊA	11721 1/2 Hartsook St
4	1/12/2008	13:33:19		John E.	Adcox	(770) 491-6477	johnadcox@mindspring.com	Atlanta	GA	2806 Evans Dale Circle
5	1/12/2008	13:33:20		Andrew	Gettings	(781) 316-8266	AndyGett@Excite.com	Arlington	MA	8 Windsor Street
6										

Figure 51: Contact Transferred to Excel

Lensure 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 App	olications
window.	

Clipboard Lin	k Options	
Transfer In		
Template :	Free form - All details 💌 📕	dit
rempione .	Free form - All details  E	QK
ΟΚ	Coursel Analy	Hala Abard
UK	Cancel Apply	Help About

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 <u>Templates</u> 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.

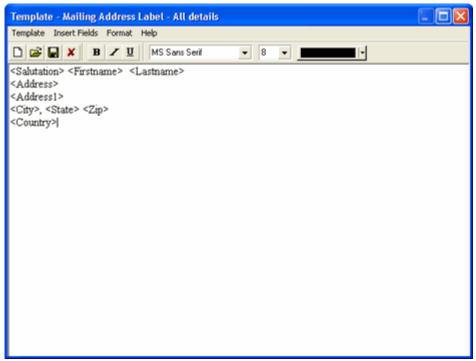


Figure 53: Template

# 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
D	Create a new template.
<b></b>	Open an existing template.
	Save the template.
×	Delete a template
B	Format the text as Bold.
Ι	Format the text as Italics.
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.



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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