

Quickest way to transfer email leads into your ACT! database

Quick Start Guide

Takes only a few minutes to read...



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Welcome to eMail-Lead Grabber Business 2020!

Thank you for choosing eMail-Lead Grabber Business. To help you get started quickly we have included this starter's guide. It takes only a few minutes to read this guide and start using the product.

Contents

About eMail-Lead Grabber Business	1
System Requirements	1
Source E-mail Software Supported	1
ACT! Versions Supported	1
Installing the Software	1
Registering the Software	1
Using eMail-Lead Grabber Business	2
Step 1: Setup Email Account	2
Setup Outlook	2
Setup POP3	3
Step 2: Create a Template	3
Step 3: Setup Filters	7
Process through Filters	8
Transfer Form E-mail from your e-mail client	9
Technical Support	10
Copyright, License and Trademark	10

Now, let us get started.

About eMail-Lead Grabber Business

eMail-Lead Grabber Business captures contact information and other details present in e-mail, web pages, word documents, text files and transfers them into ACT! database. A single click transfers all the contact details intelligently into your database.

System Requirements

- Pentium IV or higher, 1 GB RAM or higher
- 2 GB free hard disk space to run the program
- Operating Systems:
 - Microsoft® Windows 10 Professional & Enterprise (32 bit and 64 bit)
 - Microsoft® Windows 8.1 Professional & Enterprise (32 bit and 64 bit)
 - Microsoft® Windows 7 Professional Edition (32 bit and 64 bit)
 - Microsoft® Windows Vista® Enterprise Edition (32 bit and 64 bit)

Administrator rights in Windows 10 / Windows 8.1 / Windows 7 / Windows Vista

Source E-mail Software Supported

- Microsoft Outlook 2019/2016/2013/2010/2007/2003
- Other Source Applications Supported: Clipboard, Selected Text, Windows Explorer files (TXT, RTF, HTM/HTML)

ACT! Versions Supported

 ACT! 2020/2019/2018/2017/2016/2015/2014/2013/2012/2011 (Works with Professional, Premier & Ultimate Desktop Versions only. Starter Edition and Cloud Editions are not supported)

Installing the Software

The following section describes how to install your new eMail-Lead Grabber Business:

- Visit <u>http://www.egrabber.com/emailleadgrabberbusiness/trial.html</u> to download the installation file.
- Run the program from the folder where you have stored the installation files.
- The installation wizard provides step-by-step procedures to install the software. During Installation, select the "Destination Application" to install. To select ACT!, select the checkbox next to ACT!.

The default Installation path is C:\Program Files\eGrabber\eMail-Lead Grabber Business. When you finish the wizard, you have successfully installed the software.

Registering the Software

If you have purchased eMail-Lead Grabber, enter your registration key in **eGrabber Product Registration** dialog box and click **Register Now** button.

If you have downloaded a free trial version of eMail-Lead Grabber, you can:

- Use the full featured trial version without registering for THREE days.
- Register your free trial using the license key e-mailed to you and extend your trial period for another TEN days.

Extend Trial Version: We also provide a Trial Extension Key so you can use eMail-Lead Grabber for a few more days before you make a decision to buy it. You can extend the evaluation period only once. Contact eGrabber at <u>sales@egrabber.com</u> or call 1-866-299-7314 for the Trial Extension key. **Buy Product:** Click <u>here</u> to buy the product.

Using eMail-Lead Grabber Business

The eMail-Lead Grabber follows a 3-step setup process.

- Step 1: Setup Email Account
- Step 2: Create a Template
- Step 3: Setup Filters

After launching eMail-Lead Grabber, cancel the Quick Setup Wizard.

Step 1: Setup Email Account

The two most common email accounts used with eMail-Lead Grabber are Outlook and POP3. Though it is recommended to use Outlook because of its better organization, you can also use POP3 if that email account is dedicated to lead emails from third party websites.

Setup Outlook

Click Accounts on the eMail-Lead Grabber toolbar.



Figure 1: eMail-Lead Grabber Toolbar

 Click Add > Microsoft Outlook 2019/2016/2013/2010/2007/2003 to add an Outlook email account

Il Personalities			Add	IMAP
Check Mail	Account	Туре	Remove	Microsoft Outlook 2010/2007/2003 Microsoft Outlook
			Properties	POP3
			Test	
			Set as Default	
			Options	
			Help	
			Close	

Figure 2: Account Setup

Enter your account details and select the Polling and processed mailbox. The polling mailbox is
the mailbox in Outlook that contains all your leads. It is recommended that if you do not have a
separate mailbox for leads, then you create one. You can use the Outlook filters to filter the
leads or simply drag all your leads into the newly created mailbox. The processed mailbox is an
empty mailbox to save all the processed email.

Outlook 2010/2007/2003 Mail Personality Setting

Personality name:	Sales		
For Outlook profile:	Outlook (Current Outlook Profile: Outlook)		
Polling mailbox:	Personal Folders\Inbox\		
Processed mailbox:	Personal Folders\Outbox\		
Return address:	sales@egrabber.com		
SMTP server:	smtp.egrabber.com		
Poll personality:			
While importing the sender's address			
✓ Import sender's <u>e</u> -mail address ● Date received on <u>mail server</u>			
Minimport sender's d	© Date delivered into <u>O</u> utlook mailbox	×	
	OK Cancel <u>H</u> elp		

Figure 3: Personality Settings for Outlook

Click OK to save the settings.

Setup POP3

- Click Accounts on the eMail-Lead Grabber toolbar.
- Click Add > POP3 to add a POP3 email account
- Enter your account details
- Click OK to save the settings

Step 2: Create a Template

- 1) Create Template in Advanced Mode:
 - Right Click on the Web form Email, Point to Create template and click Advanced Mode to launch the template maker.



Figure 4: Create Template

- 2) Create New Template:
 - In the **TemplateMaker** window, click **File> New** to create a new template.
 - In the Template Type list, select Email Extract.
 - In the Select Contact Manager list, select the appropriate ACT! Version.

Click OK.

Create New Template		×
Template Option Template Type:	Email Extract	
– Contact Manager Settings – Select Contact Manager:	ACTI 2013	
Database Name:		
	OK Cancel	

Figure 5: Create Template for ACT!

- 3) Enter your User Name and password.
- 4) Click Login. When successfully logged in click OK.

Login User field selection Transfer Company Duplicate Check Activity About Database File : [T\ACT for Windows 12\Databases\ACT2010Demo.PAD Image: Username : [Chris Huffman Password : [Image: Username : [Login] Image: Username : [Login]	CT! 2013 Link (Options
If each of without it is doubless out to be address out to be addre	Login User field s	election Transfer Company Duplicate Check Activity About
Login	Username : Password :	<u>U</u> se last opened database
OK Cancel Apply Help		

Figure 6: ACT! Login

- 5) Select User Fields
- In the Link Options Window that appears, click User Field Selection tab
- Select the Fields to which you want to transfer the information. If the fields are not displayed, click **Refresh** to view the fields.

CT! 2013 Link O	ptions	2
Login User field se	election Transfer Company Duplicate Check Activity	About]
Please select the I	elds	
Field Label	Internal column name	
<		
	<u>Refresh</u> Select all Clear all	
OK	Cancel Apply Help	

Figure 7: Select User Fields

- 6) Duplicate Check Setup:
 - In the **Duplicate check** tab, select the Fields to check for duplicates.
 - Select the **Mode** or action to perform when a duplicate is found.
 - Click OK.

Select transfer mode		
Warn if contact exists		<u>.</u>
Check for duplicates in Co	ontact based on	
Contact		
Company		
Contact : E-Mail		
Contact : Phone		
	hallos hanalas	
 Bring ACT! to forefrom 	t after transfer	

Figure 8: Setup Duplicate Check

7) To set Predefined values, click **Process > Set Predefined values**.



Figure 9: Select to set predefined Values

8) In the Set Predefined values window, select the field to which you want to specify a predefined value by clicking the "..." button and enter the Predefined value on the right.

Field Names	Initialize Field To	
		Edit
		Delete
		Delete
	Pre-Defined Values	
Select Field		
Select Field ID/Status	Web Lead	Add

Figure 10: Setup Predefined Values

9) Mapping the fields:

Highlight the tag (in this case "first:") and mark it as an anchor by clicking on the \bigotimes icon.



Figure 11: Map Fields

10) Mapping the Values:

Select the Tag Value (in this case "John") then click on the Insert Field button and select the appropriate field in ACT!.

Untitled - TemplateMaker				
File Edit View Insert Process Tools Help				
0 📽 🖬 👗 🐿 🚳 👫	H 💷 🚫 🔛	8		
Below is the result (Ignore	It was		
submitted by (john8r	AutoDetect >			
(first:) John	First Name			
	Last Name "6			
	Middle Name			
last: Mathew	Full Name			
	Company			
email: john@mcgraw.c	Department Job title			
	300 000			
company: The McGraw-	Email	, Inc.		
	Email 2 Email 3			
	Char 3			

Figure 12: Map Values

- 11) Repeat Steps 9 and 10 until all your tags and values have been mapped to their respective fields in the ACT! Database.
- 12) Click **File > Save** to save the template. The template is now listed in the Form Processing Center.

Step 3: Setup Filters

- 1) Click Filters on the eMail-Lead Grabber toolbar
- 2) Click **New** on the bottom left and type a name for the filter.

er Setup				1
Filter(s) Test	Manual Mail Filter Setup	 Automatic 	Cutgoing	
	Header : None	None Ignore		٦
	Header : None	None		
54	ave Filter	×		
	Please enter the name of the	ne filter		
	Demo		·	4
		OK Cancel		
	None	-		
< >	None			
	None			
Move Up Move Down				
New Remove	Note: Click the "S	ave Filter" button to save the chang	es made to the current filte	я.
	S	ave Filter Save Filter As	Close He	elp

Figure 13: Create Filters

- 3) Setup filters to work in both Manual and Automatic modes by selecting both the options
- 4) Select the matching condition for the email to be filtered, just as you would in an email filter. The example below filters all the emails that have the text "ELG" in the Subject line. You can also setup a second condition by repeating the above steps. If you do not have a second condition, select **Ignore**.

Manual Mail Filter Setup	V Automatic	Cutgoing
Match Header: Subject		
	Ignore 💌	
Header : None	▼ None ▼	

Figure 14: Filter - setup criteria

5) Next, select the action to be performed when the emails satisfy the condition set above. For example, to process the email with the test template setup in Step 2, select **Transfer To**.

Action	
None	
None	•
Transfer To	
Reply With 서	
Size Limitations	•
Date Range	-
Round Robin Forwarding	
Round Robin Processing	•
Skip Rest	h to save the changes

Figure 15: Filter - Setup Action

- 6) In the pop-up window that appears, select the template to which you want to process the emails. Click **Add.**
- 7) Save the Filter and Close the window.

Process through Filters

Select the messages to be processed in the **Messages** window. To select all the messages, press **Ctrl+A**. Right click and select **Process through Filters**

- The Task Status tab in the Status report at the bottom displays the percentage of progress that takes place during the transfer process.
- Click on the Process Status tab and the last column says "Transfer Successful" if the form e-mail is successfully transferred to your database. The selected form e-mail is processed by the Sample Template and transferred to create new Contacts in ACT! ™ database.

If your database is open, then the transferred contact is displayed in front of the window.

Transfer Form E-mail from your e-mail client

- Refresh the Sample Template
- Click Import Toolbar on the eMail-Lead Grabber toolbar



Figure 16: Select Import Toolbar

Select the e-mail from the Inbox of your e-mail client

- Select your e-mail program from the Source list of the Import Toolbar
- Select the Sample Template from the **Destination** list of the toolbar
- Click GO

The selected e-mail is processed creating new contacts in your database.



Note: You can transfer from popular e-mail clients like Outlook. You can transfer from AOL and others by selecting the source as "Selected Text ". You can also transfer documents stored in folders by selecting the source as " Windows Explorer".

For Step-by-Step instructions on how to use the product refer to Online Help or download the user guides from <u>http://www.egrabber.com/emailleadgrabberbusiness/support.html</u>.

Technical Support

Telephone: (408) 872-3103 Weekdays 8:30 AM - 4:30 PM Pacific Time Fax: (408) 861-9601 E-mail: <u>support@egrabber.com</u> Web: <u>http://www.egrabber.com/emailleadgrabberbusiness/</u>

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