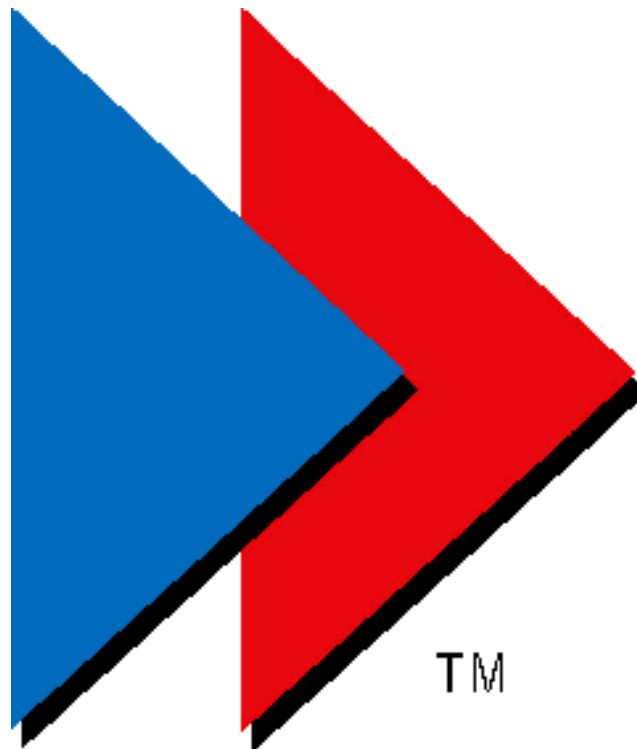


eMail-Lead Grabber

Business 2020



User Guide

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Preface

Your website may contain different online forms like survey forms, feedback forms, enquiry forms, registration forms and so on. When a form is submitted online, the data in the form is sent as email to your default email client.

You need to extract the contact details and other information from the email forms and save the data in your database application for follow up.




eMail-Lead Grabber Business transfers the data available in the email form into your database automatically. This enables you to eliminate manual data entry, avoid hassle in processing the web forms and to follow up the leads efficiently.

This guide explains you how to setup eMail-Lead Grabber to transfer data from the email forms to your application.

This is a one-time setup and then eMail-Lead Grabber starts transferring the email data automatically into your destination application.

Conventions

The following conventions are used in the guide:

Convention	Description
Figures	Illustrations to understand the features of eMail-Lead Grabber.
Cross-reference	Cross-references are provided as hyperlinks for easy navigation.
	Note: Important or supplemental information.
	Tip: Suggestions that are supportive.
	Warning: A caution message.

1. Key Features

- **Automatic data entry:** Transfers contact details from different web forms into your database application automatically.
- **Works with existing Forms:** eMail-Lead Grabber is independent of scripts used in your web site and works with your existing web forms.
- **Works with existing Email setup:** eMail-Lead Grabber can download email from your existing Email client. You can also send email using eMail-Lead Grabber.
- **Checks for duplicates:** eMail-Lead Grabber can check for duplicate records while transferring into your contact manager.
- **Schedule Activities:** You can schedule activities automatically for the transferred contact.
- **Imports email from different sources:** Using the Import Toolbar component, you can import email from popular email clients / server / Windows Explorer into different applications.
- **Exports data as CSV files:** Export the form details to text files in tab separated or comma separated formats. This can be imported into any application that supports these formats.
- **Send Automatic response:** You can send customized auto-responses to a contact. By merging values in the email with a pre-defined message, you can customize this auto-response.
- **Save E-mail Content:** You can save the email contents as a text file and attach to the transferred contact record.
- **Auto-distribute E-mail:** You can distribute the email to your sales team members using Round Robin Forwarding for effective follow-up.
- **Search for Keywords:** You can search for any keyword related to your business activity in the transferred email form. The search results can be saved in the specified fields of your database.
- **Handle Bounce email:** When an email is bounced, you can mark the bounced email ID in your database. This enables you to avoid future correspondence with the invalid email ID.

2. Supported Applications

eMail-Lead Grabber Business 2020 supports the following applications:

- ◆ 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)
- ◆ Microsoft Excel 2019 / 2016 / 2013 / 2010 / 2007 / 2003
- ◆ Microsoft Outlook 2019 / 2016 / 2013 / 2010 / 2007 / 2003
- ◆ Data Export

You can download the email forms from the following email clients:

- ◆ Microsoft Outlook 2019 / 2016 / 2013 / 2010 / 2007 / 2003
- ◆ AOL and Other email clients

3. eMail-Lead Grabber – Setup Wizard

After installation, the Setup Wizard appears that guides through the setup process of eMail-Lead Grabber.

The Setup Wizard consists of three steps.

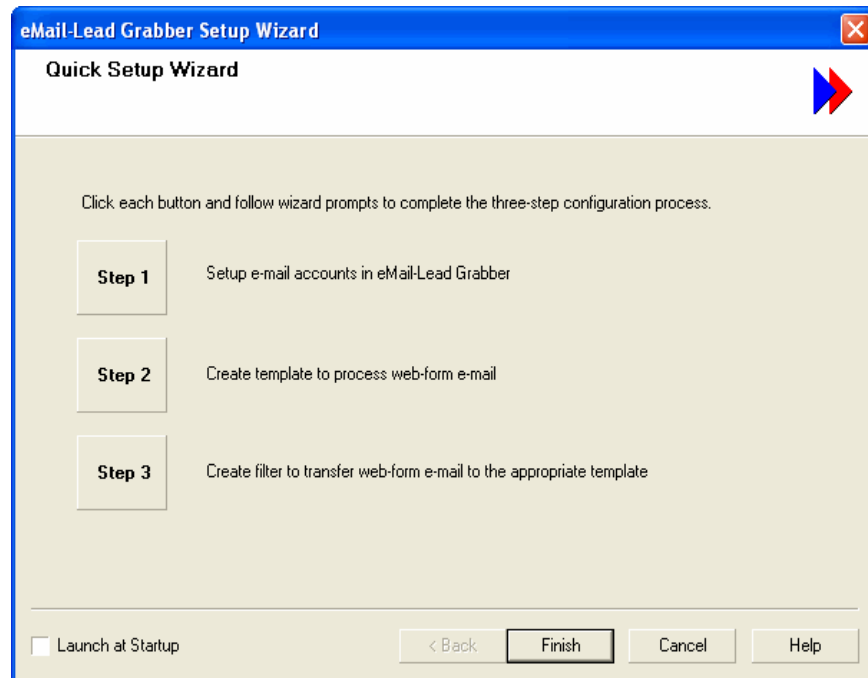


Figure 1: Setup Wizard

Step 1: Click here to setup eMail-Lead Grabber to download email messages from your default email client. The setup email wizard appears and guides you through the process of downloading email messages from selected email client. Refer to [Chapter 5](#) for downloading email from various email clients. The settings that appear in the wizard are similar to the options explained in this chapter.

Step 2: Click here to launch the Template Wizard that guides you through the process of creating a template. You need to create a template to map the fields that appear in your email form with the fields available in your destination. Refer to [Chapter 12](#) for creating templates.

Step 3: Click here to create a filter. The Create Filter wizard guides you through the process of creating a filter with specific criteria and to setup the actions to be performed when the condition is satisfied. You need to create a filter to separate appropriate email messages and to transfer them to relevant templates.

Refer to [Chapter 18](#) to setup a filter. The settings that appear in the Create Filter wizard are similar to the options explained in this chapter.

Launch at Startup: By default this option is selected. Whenever you launch eMail-Lead Grabber, the Setup Wizard is launched. Clear this checkbox to disable the wizard being displayed. You can access this wizard from the **File > Quick Setup Wizard** menu.



You can also **Cancel** this wizard and setup the options manually.

For best results, you can complete the above steps sequentially. Once you finish the wizard steps, eMail-Lead Grabber automatically downloads the email forms from your default email client, filters appropriate messages and transfers the contact details to selected destination application.

4. eMail-Lead Grabber - Components

eMail-Lead Grabber contains three major components.

eMail-Lead Grabber Business: Once you install and launch eMail-Lead Grabber, this window is displayed. This window appears similar to an email client and contains mailboxes like Inbox, Outbox and Trash. You can download your email messages into the **Inbox** available in eMail-Lead Grabber. You can also check for mail, send, reply to and forward email as you do with an email client.

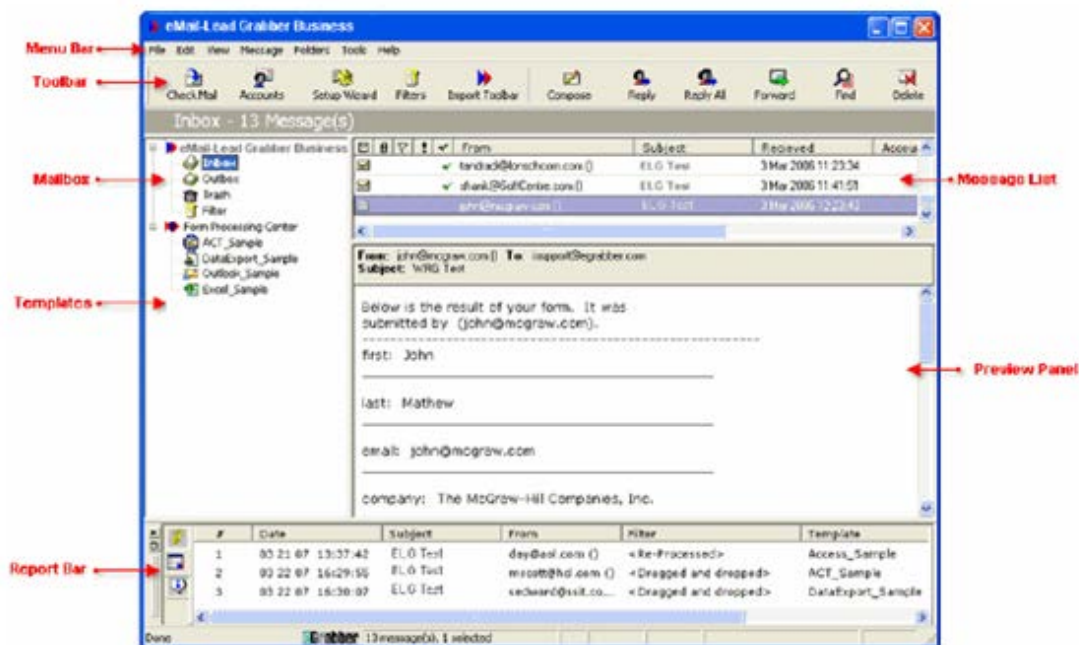


Figure 2: eMail-Lead Grabber Window

The eMail-Lead Grabber also contains **Form Processing Center** that displays the templates. You can launch the TemplateMaker, Import Toolbar and create filters from this window.

You can setup to download the email forms from your default email client into the **Inbox** available in eMail-Lead Grabber.

Import Toolbar: You can use the Import Toolbar to transfer the email from your email client to Inbox in eMail-Lead Grabber or directly to your application.

TemplateMaker: You can use this component to create templates. The templates enable you to map the fields available in your email form with the fields in your application.

These components are explained in detail in the following sections.

5. Setup to download email into eMail-Lead Grabber

You can download the email forms from your default email client into eMail-Lead Grabber **Inbox**.

Click the **Accounts** option available in the eMail-Lead Grabber toolbar.

[OR]

Click **Tools > Accounts**.

In the **Account Setup** dialog box, click **Add** and select your email client.

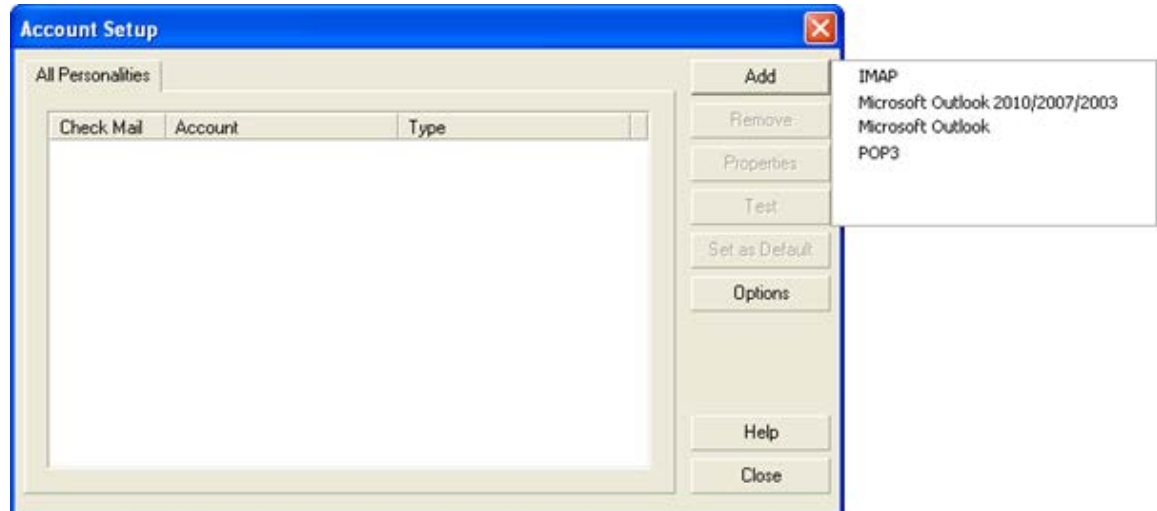


Figure 3: Account Setup

You can setup to download from the following email clients.

- ♦ [IMAP](#)
- ♦ [Microsoft Outlook](#)
- ♦ [POP3](#)

5.1. Setup to download using IMAP Server


To download the email using IMAP server,

Click **Add > IMAP** in the **Account Setup** dialog box.

In the **POP3 Personality Settings** dialog box, enter the following details:



Figure 4: Personality Settings - IMAP

- ◆ **Personality Name:** Enter a name for the email messages to be downloaded.
- ◆ **Incoming Mail Server:** Enter your Incoming mail server name.
- ◆ **User Name:** Enter login name of your IMAP account.
- ◆ **Password:** Enter your IMAP account password.
- ◆ **Polling Mailbox:** Click the  button to select the mailbox from which you want to download the email forms.
- ◆ **Return Address:** Enter your email address.
- ◆ **Outgoing SMTP Server:** Enter your Outgoing mail server name.
- ◆ **Poll Personality:** Select this option to download the email from POP3 server to eMail-Lead Grabber Inbox automatically.
- ◆ **More Settings:** Click here to configure the SMTP server to send mail. As you click **More Settings**, the **E-mail Settings** dialog box is displayed.

In the **Outgoing Server** tab, make the following settings:

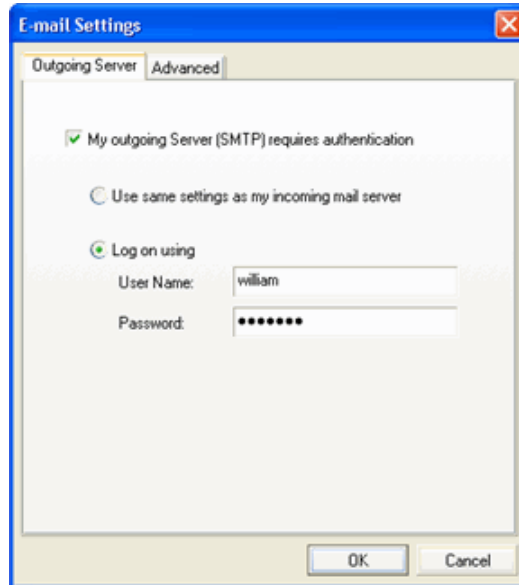


Figure 5: Email settings - Outgoing Server

Select **My Outgoing Server (SMTP) requires authentication** to ensure SMTP server authentication before sending e-mail. Specify the method of authentication by selecting any one of the following options:

- ◆ Select **Use Same Settings as my incoming mail server** if you want to use the login and password details of incoming mail server (POP3).
- ◆ Select **Log on using** if the SMTP server requires a different user name and password. Enter the following details:
 - a. **User Name:** Enter the user name of your SMTP server.
 - b. **Password:** Enter the password of your SMTP server.

Click **OK** to save the settings.

In the **Advanced** tab, you can make the following settings:

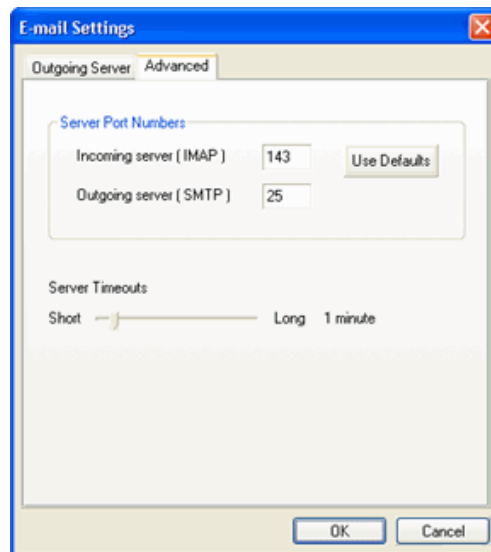


Figure 6: Email settings - Advanced

Under **Server Port Numbers**,

- **Incoming Server (IMAP):** The port number of your Incoming Server (IMAP) is displayed by default.
- **Outgoing Server:** The port number of your Outgoing Server (SMTP) is displayed by default.

Click **Use Defaults** to use the default port numbers.



You can also change the port numbers.

Under **Server Timeouts**, specify the time interval by moving the slider. (The time varies from 30 seconds to 6 minutes). The time indicates how long to wait for a response from the server. Specify short time if your server is fast and long-time if the server is slow or busy.

Click **OK** to save the settings.

5.2. Setup to download from Microsoft Outlook



To download the email from Microsoft Outlook,

In the **Account Setup** dialog box,

Click **Add > Outlook 2019 / 2016 / 2013 / 2010 / 2007 / 2003** to download from Microsoft Outlook 2019 / 2016 / 2013 / 2010 / 2007 / 2003.

In the **Outlook Mail Personality Settings** dialog box, enter the following details:

Figure 7: Personality Settings - Outlook

- ◆ Mail Personality
- ◆ **Personality name:** Enter a name for the email messages to be downloaded.
- ◆ **Polling Mailbox:** Click the  button to select the mailbox from which you want to download the email forms.
- ◆ **Processed Mailbox:** Click the  button to select the mailbox to which you want to save the processed email forms.
- ◆ **Return address:** Enter your email address.
- ◆ **SMTP server:** Enter your outgoing mail server name.

- ◆ **Poll personality:** Select this option to download the email from Outlook to eMail-Lead Grabber Inbox automatically.
- ◆ **Import sender's e-mail address:** Select this option to display the sender's email ID in the **From** column of eMail-Lead Grabber Inbox.
- ◆ **Import sender's display name:** Select this option to display the sender's display name in the **From** column of eMail-Lead Grabber Inbox.
- ◆ **Date received on mail server:** Select this option so that the Received Date in the Inbox is retrieved from the date on which mail is received by the mail server.
- ◆ **Date delivered into Outlook mailbox:** Select this option so that the Received Date in the Inbox is retrieved from date on which mail is received by Outlook mailbox.

Click **OK**.

5.3. Setup to download using POP3 Server

To download the email using POP3 server,

Click **Add > POP3** in the Account Setup dialog box.

In the **POP3 Personality Settings** dialog box, enter the following details:

Figure 8: Personality Settings - POP3

- ◆ **Personality Name:** Enter a name for the email messages to be downloaded.
- ◆ **Login Name:** Enter login name of your POP3 account.
- ◆ **Password:** Enter your POP3 account password.
- ◆ **Return Address:** Enter your email address.
- ◆ **Incoming (POP3) Mail Server:** Enter your Incoming mail server name.
- ◆ **Outgoing (SMTP) Mail Server:** Enter your Outgoing mail server name.
- ◆ **Delete mail from server after download:** Select this option to delete the messages available in your POP3 server after downloading them into eMail-Lead Grabber.

- ◆ **Poll Personality:** Select this option to download the email from POP3 server to eMail-Lead Grabber Inbox automatically.
- ◆ **Ignore Incoming mail above:** Enter size limitation for incoming messages. The messages that exceed the size you have defined here are not downloaded into eMail-Lead Grabber.
- ◆ **More Settings:** Click here to configure the SMTP server to send mail. As you click **More Settings**, the **E-mail Settings** dialog box is displayed.

In the **Outgoing Server** tab, the settings are similar to the IMAP settings. Refer to [IMAP](#) for details.

In the **Advanced** tab, you can make the following settings:

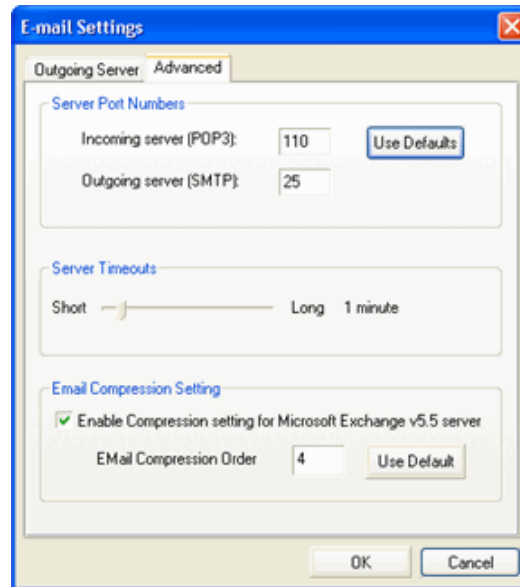



Figure 9: Email settings - Advanced

Under **Server Port Numbers**,

- **Incoming Server:** The port number of your Incoming Server (POP3) is displayed by default.
- **Outgoing Server:** The port number of your Outgoing Server (SMTP) is displayed by default.

Click **Use Defaults** to use the default port numbers.

 You can also change the port numbers.

Under **Server Timeouts**, specify the time interval by moving the slider. (The time varies from 30 seconds to 6 minutes). The time indicates how long to wait for a response from the server. Specify short time if your server is fast and long-time if the server is slow or busy.

Under **Email Compression Setting**, select the **Enable Email Compression Settings** checkbox to download e-mail from Microsoft Exchange v5.5 Server.

- Enter the **Email Compression Order** number to download the complete email from Microsoft Exchange. You can increase or decrease the compression order number according to the size of your Microsoft Exchange server. The default number is 4.

Click **OK** to save the settings.

6. Download email into eMail-Lead Grabber

After you have setup your Account, you can start downloading email forms from your email client.

To download the email forms manually,

- Click **Check Mail** in the **eMail-Lead Grabber Business** toolbar.

[OR]

- Click **Check Mail** in the **File** menu.

The email forms are downloaded from your email client as you have setup and saved in eMail-Lead Grabber Inbox.

To download the email forms automatically, you need to setup the **Miscellaneous** option.

- Click **Tools > Options**.
- In the **Miscellaneous Setup** dialog box, make the following settings:

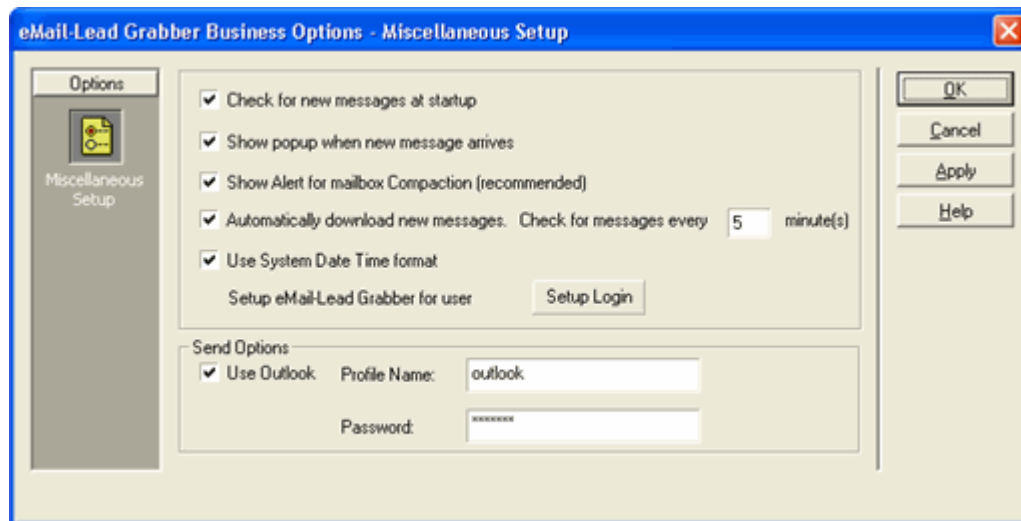



Figure 10: Miscellaneous Setup

- **Check for new messages at startup:** Select this option to check for email whenever you launch eMail-Lead Grabber.
- **Show popup when new message arrives:** Select this option to be notified whenever you receive new email.
- **Show Alert for mailbox Compaction:** Select this option to get a message for compaction whenever your mailbox exceeds a limit of 45 MB. This option is selected by default. To disable the warning message, you can clear this checkbox.
- **Automatically download new messages:** Select this option to check for email at specified time interval. Enter the time in minutes in the space provided.
- **Use System Date Time format:** Select this option to display the date as per your System settings. If this option is not selected, then the date is displayed in the default format as '**MM/DD/YY**'.
- Click **Setup Login** to setup login restrictions for eMail-Lead Grabber.

- In the User Login **dialog box that appears**, enter User Name and Password
 - Re-enter the password in **Confirm Password**.
 - Click **OK**.
- **Use Outlook:** Select this checkbox to send email using Microsoft Outlook. Enter the Profile Name and Password to send email through secured authentication.

Click **OK** to save the settings.

Now the email is checked automatically in the specified time interval.

 Ensure that the **Poll Personality** checkbox is selected in the **Personality Settings** to download the email. If you enter the time interval as zero (0), then email is not checked.

Next, you need to create a template to process the downloaded email messages and to transfer the details to your destination. Refer to [TemplateMaker](#) to create a template.

7. Working with eMail-Lead Grabber

eMail-Lead Grabber window contains the following to manipulate the messages.

- ◆ Menu bar
- ◆ Toolbar
- ◆ Status bar
- ◆ Report bar

You can make use of the above components to send, reply or forward the messages. You can launch the Import Toolbar that can be used to download messages from other email clients. You can also launch the Template Maker to create templates.

7.1. eMail-Lead Grabber - Menu bar

The eMail-Lead Grabber menu bar contains the following commands:

File Menu

Option	Function
Check Mail	Checks e-mail and download new e-mail to the Inbox.
New Folder	Create a new folder in Email Center.
New Mailbox	Create a new mailbox in Email Center.
Print	Print selected message.
Quick Setup Wizard	Launch the Setup Wizard
Show Import Toolbar	Launch the eMail-Lead Grabber- Import Toolbar.
Show Template Wizard	Launch the Template Wizard to create templates.
Show Template Maker	Launches TemplateMaker to create templates.
Exit	Quit eMail-Lead Grabber.

Edit Menu

Option	Function
Undo	Reverts the last performed action.
Cut	Removes the selected text and places it in the Clipboard.
Copy	Copies the selected text to the Clipboard.

Paste	Inserts the contents of Clipboard.
Find	Opens the Find Message dialog box and enables you to search for messages.
Select All	Selects all the contents of a message.

View Menu

Option	Function
Toolbar	Show or Hide the eMail-Lead Grabber Toolbar.
Status Bar	Show or Hide the Status Bar.
Report Bar	Show or Hide the Report Bar.
Folder View	Show or Hide the folders displayed in the Folders view.
Task Status	Show the Task Status tab displayed in the Report Bar.
Process Status	Show the Process Status tab in the Report Bar.
Errors	Show the Errors tab in the Report Bar.
Refresh View	To update and reflect the changes made to the folders displayed in the current view.

Message Menu

Option	Function
Compose	Create a new message.
Reply	Reply to the sender of the selected message.
Reply All	Reply to all in the TO and CC columns of the selected message.
Forward	Forward selected message.
Delete	Delete selected messages.
Import Messages	Import messages from the default email client.

Folders Menu

Option	Function
Inbox	Displays the Inbox.
Outbox	Displays the Outbox.
Trash	Displays the Trash.
User Folders	Select the sub folders and mailboxes within folders, if available.
Form Processing Center	Displays all the templates. Click the template name to view the messages processed using the same.

Tools Menu














Option	Function
Filters	Create a new filter or edit an exiting filter.
Accounts	Create a new e-mail account in eMail-Lead Grabber.
User Setup	Setup login restrictions to eMail-Lead Grabber. Enter a user name and password to login to eMail-Lead Grabber.
Stationery	Create, Edit, or Delete Stationery.
Register / Unregister Template	Add or remove templates from the Form Processing Center .
Backup/Compact	Launches Dr. Mailbox to maintain your mailboxes.
Options	View the Options dialog box to provide mail settings for all your e-mail accounts.

Help Menu

Option	Function
Help Topics	Launches the Help.
eGrabber on the Web	Access Live Update, Online User Guide and FAQs from eGrabber website.
Demo	Launches demo on the product.
Register/Unregister Product	Register or unregister eMail-Lead Grabber.
About eMail-Lead Grabber	Displays eMail-Lead Grabber version and copyright information.

7.2. eMail-Lead Grabber - Toolbar

The eMail-Lead Grabber toolbar contains the following commands:

Option	Function
 Check Mail	Check for new email manually.
 Accounts	Setup Accounts.
 Setup Wizard	Launch Setup Wizard.
 Filters	Setup Filters.
 Import Toolbar	Launch Import Toolbar.
 Compose	Create new email message.
 Reply	Reply to the sender of the selected message.
 Reply All	Reply to all in the TO and CC columns of the selected message.
 Forward	Forward selected message.
 Find	Opens the Find Message dialog box and enables you to search for messages.
 Delete	Delete selected messages.
 Re-Process	Re-process an email message
 Help	Launches Help

7.3. eMail-Lead Grabber - Status bar

The status bar displays the total number of messages and the number of messages selected in the current folder.

7.4. Report bar

The report bar displays the status of the processed messages and error messages. This bar contains three tabs as follows:

Task Status:

Click  or View>**Task Status** to view this tab.



Figure 11: Task Status

The task status displays the background activities like retrieving email from your email client, processing messages through filters, templates, etc. This tab also displays the progress of a task in percentage.



Right-click the Task Status and select **Abort Task** to stop a task being processed.

Process Status:

Click  or View>**Process Status** to view this tab.


#	Date	Subject	From	Filter	Template	Status/Error
1	12 11 07 15:32:18	ELG Test	mark@gm.com ()	<Dragged and dropped>	GM6_Sample	Skipped Transfer...
2	12 11 07 15:43:05	ELG Test	mark@gm.com ()	<Dragged and dropped>	GM6_Sample	Skipped Transfer...
3	12 11 07 15:49:28	ELG Test	mark@gm.com ()	<Dragged and dropped>	GM6_Sample	Skipped Transfer...
4	12 11 07 16:12:32	ELG Test	mark@gm.com ()	<Re-Processed>	GM6_Sample	Transfer Successful

Figure 12: Process Status

The following details are displayed in the **Process Status** tab:

Column	Description
Date	Date and time of process.
Subject	Subject of the processed e-mail.
From	The sender's email ID of the processed e-mail.
Filter	Name of the filter used for processing the e-mail.
Template	Name of the template used for processing the e-mail.

Status\Error	<p>Displays the Transfer Status.</p> <p>If the transfer is successful, the message “Transfer Successful” is displayed.</p> <p>If the transfer fails then the error message is displayed with the reason for failure.</p> <p>If the transfer is skipped then “Skipped Transfer” is displayed.</p> <p>If the e-mail is processed and not transferred then “Process Successful” is displayed.</p>
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 To save the processed details, right-click in the Process tab and select **Save Status Log**. To clear the text, right-click and select **Delete** or **Delete All**.

Errors:

Click  or **View>Errors** to view this tab.

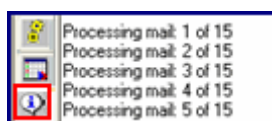



Figure 13: Errors tab

The errors that occurred during the background process are displayed here.

 To clear the error messages, right-click and select **Delete**.

7.5. Shortcut Menus

Right-click on any part of the eMail-Lead Grabber window to access the shortcut menus.

The shortcut menus vary according to the selected area. For example, if you right click the message grid, you can access the shortcut menu as shown in [Figure 19](#)

You can use these shortcut menus to quickly access the commands that are available in the menu bar and the toolbar.

8. Using Import Toolbar

You can download email messages from other email clients using the Import Toolbar.

To launch the Import Toolbar,

- ◆ Click the **Import Toolbar** Icon in the eMail-Lead Grabber Toolbar.

[OR]

- ◆ Click **File > Show Import Toolbar**.

The Import Toolbar appears as shown in [Figure 14](#).



Figure 14: Import Toolbar

You can select the source from which the email messages to be downloaded from the drop-down list that appears on the left panel.

The options available in this list are:

- ◆ Selected Text
- ◆ Text in Clipboard
- ◆ Windows Explorer
- ◆ Outlook

If you are using an email client other than the applications listed above, then you can use the Selected Text / Text in Clipboard / Windows Explorer options to download the email messages.

The right panel displays the option Inbox and the templates created.

Select the option **Inbox** to download the messages to eMail-Lead Grabber Inbox or the template to directly transfer the details from the selected message to selected destination application. You can find the option to create a template in this drop-down list.

Refer to [Chapter 11](#) for details on creating a template.

9. Customize Import Toolbar

You can customize the source and destination options available in the Import Toolbar.

Click  that appears in the center of the Toolbar to launch the **Options** dialog box.

In the **Options** dialog box, you can setup the source, destination and miscellaneous options.

9.1. Add / Remove Source Application

In the **Options** dialog box, click the **Input Source** option to add or remove the source applications that are displayed in the Import Toolbar.

The available source applications are displayed in the dialog box.

To add an application to the toolbar,

Select the application displayed under **Available Sources** and click the **Add** button.

The application is now displayed under **Selected Sources**.

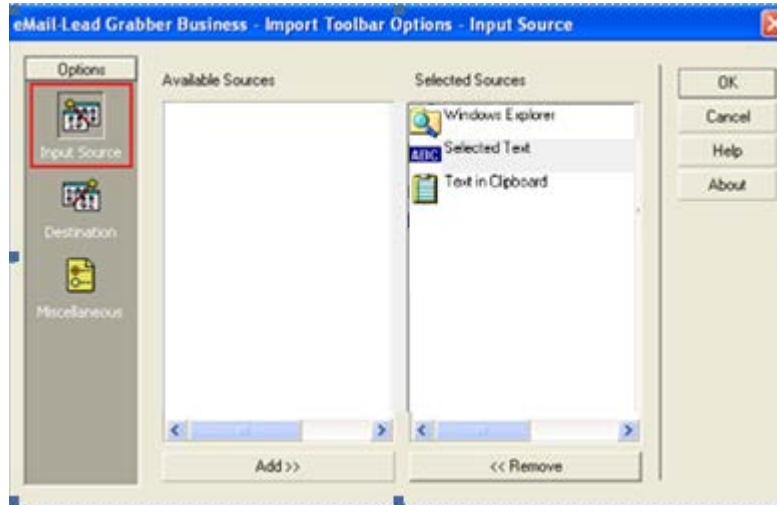


Figure 15: Add / Remove Source Applications

To hide an application being displayed in the toolbar,

Select the application displayed under **Selected Sources** and click the **Remove** button.

The application is now displayed under **Available Sources**.

Click **OK** to save the settings.

The applications listed under **Selected Sources** are displayed in the drop-down list on the left panel of the toolbar.

9.2. Add / Remove Destination Application

In the **Options** dialog box, click the **Destination** option to add or remove the templates that are displayed in the Import Toolbar.

The available templates are displayed in the dialog box.

To add a template to the toolbar,

Select the template displayed under **Available Templates** and click the **Add** button.

The template is now displayed under **Selected Templates**.

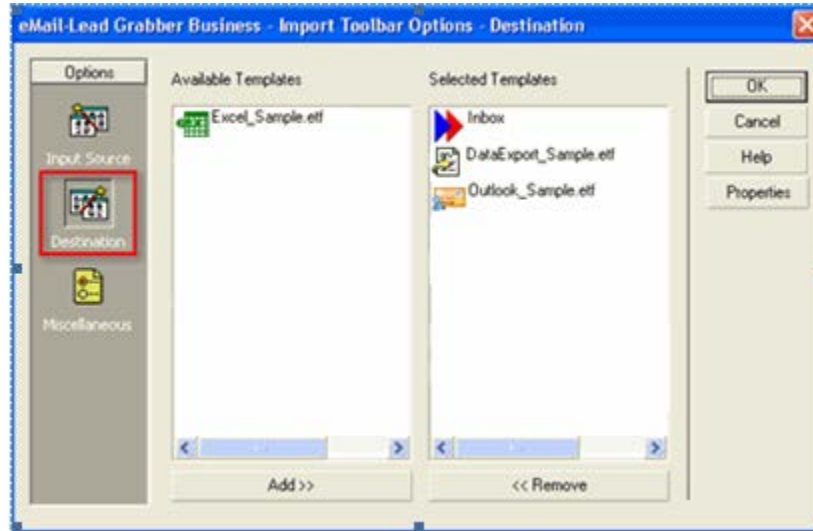


Figure 16: Add / Remove Templates

To hide a template being displayed in the toolbar,

Select the template displayed under **Selected Templates** and click the **Remove** button.

The template is now displayed under **Available Templates**.

Click **OK** to save the settings.

The templates listed under **Selected Templates** are displayed in the drop-down list on the right panel of the toolbar.

9.3. Miscellaneous Setup

In the **Options** dialog box, click **Miscellaneous** to setup other options.

In the **Miscellaneous** dialog box, you can setup the following options:

Show Transfer Window: Select this check box to display a transfer window. The transfer window appears whenever you process email messages; this window displays the status and number of messages processed.

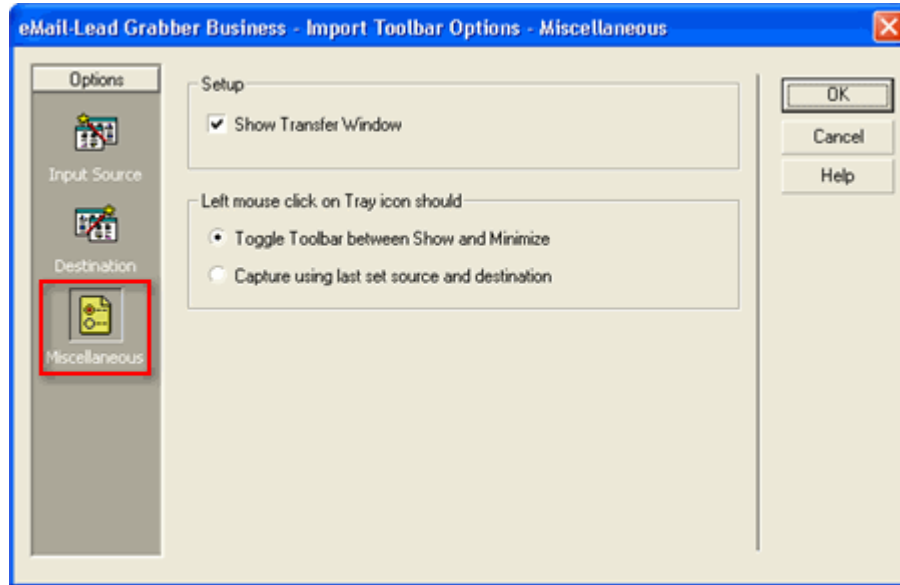


Figure 17: Import Toolbar - Miscellaneous Setup

Under **Left mouse click on Tray icon should**,

- **Toggle Toolbar between Show and Minimize:** Select this option so that when you click on the Tray Icon, the Import Toolbar is shown or minimized.
- **Capture using last set source and destination:** Select this option so that when you click the Tray Icon, the email messages are transferred with the last settings selected in the Import Toolbar.

Click **OK** to save the settings.


10. Download email using Import Toolbar

Select your email client from the Source list of the Import Toolbar. If your email client is not available in the list, select your message manually and select the option Selected Text in the toolbar. You can also transfer information from documents available in a folder by selecting the option Windows Explorer.

Select the option Inbox in the Destination list to transfer the messages to the eMail-Lead Grabber Inbox. To transfer the messages directly to your destination, select the relevant template.

Now click the **Go** button in the toolbar.

The selected messages are transferred according to the selected settings.

 You can create a new template by selecting the option **Create Template** from the destination list.

After downloading the email messages to eMail-Lead Grabber Inbox, you need to create templates for transferring the information into your destination.

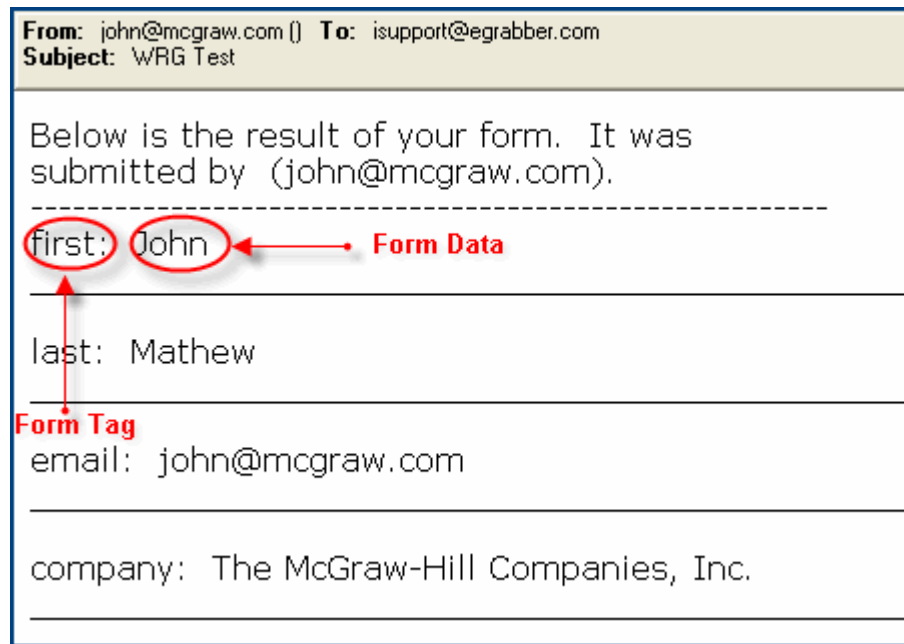
11. TemplateMaker

Your email form contains two major components: Form Tags and the form data.

- Form tags are the fields available in your email form.
- Form data is the value filled in by the visitor.
- You need to map the form tags with the database fields.

While transferring, the form data is transferred into the mapped fields in the selected application.

The mapping of fields varies according to the selected destination.



The image shows an email interface with a header bar containing the following text: **From:** john@mcgraw.com () **To:** isupport@egrabber.com **Subject:** WRG Test. Below the header, a message reads: "Below is the result of your form. It was submitted by (john@mcgraw.com)." A dashed line separates this message from the form content. The form consists of several fields: "first: John", "last: Mathew", "email: john@mcgraw.com", and "company: The McGraw-Hill Companies, Inc.". Red annotations highlight the "first:" label as a "Form Tag" and the "John" value as "Form Data".

From: john@mcgraw.com () **To:** isupport@egrabber.com
Subject: WRG Test

Below is the result of your form. It was submitted by (john@mcgraw.com).

first: John **Form Data**

last: Mathew

Form Tag email: john@mcgraw.com

company: The McGraw-Hill Companies, Inc.

Figure 18: Example for an Email Form

You can create the templates in two methods:

- 2) Wizard Mode
- 3) Advanced Mode

12. Create Template in Wizard Mode

Launch the Template Wizard by any one of the following methods:

- Click **Step 2** in the Setup Wizard

[OR]

- Select any email that contains all the form tags, right-click and select **Create Template in Wizard Mode**. (Refer [Figure 19](#))

[OR]

- Right-Click the Form Processing Center and select **Create Template Wizard Mode**.

[OR]

- Click **File > Show Template Wizard**.

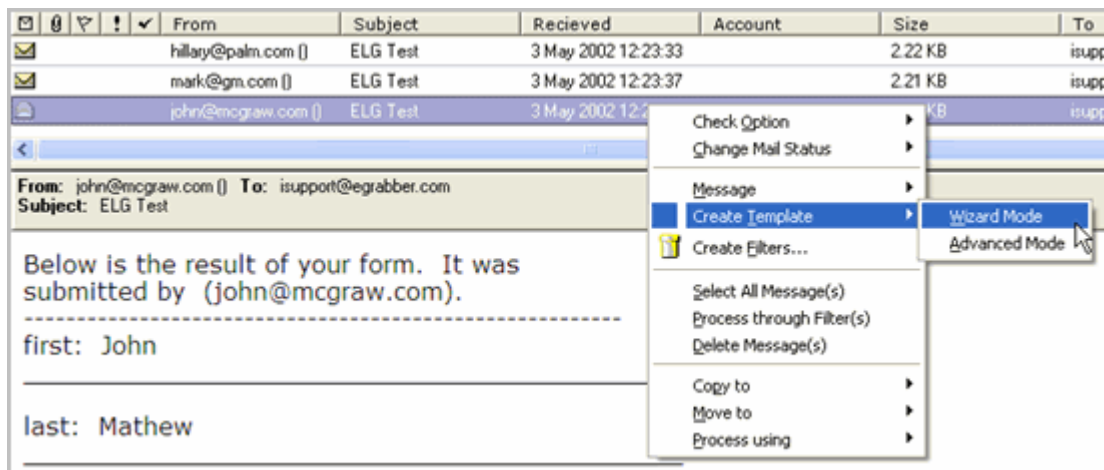
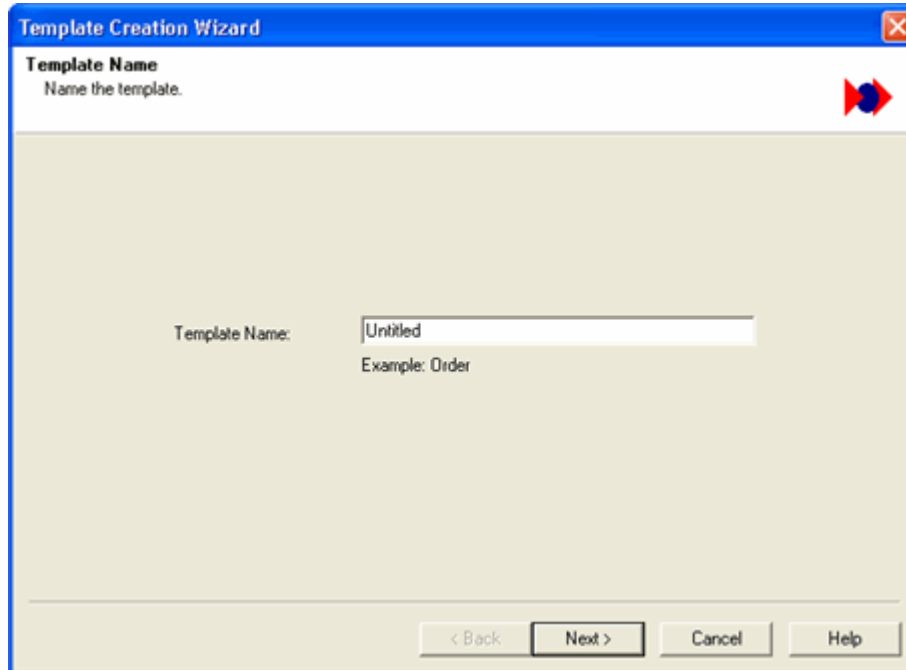


Figure 19: Create Template

The **Template Creation Wizard** is launched and this wizard guides you through the process of creating a template.

12.1. Name the Template

The first step is to name the template. Enter a name and click **Next**.



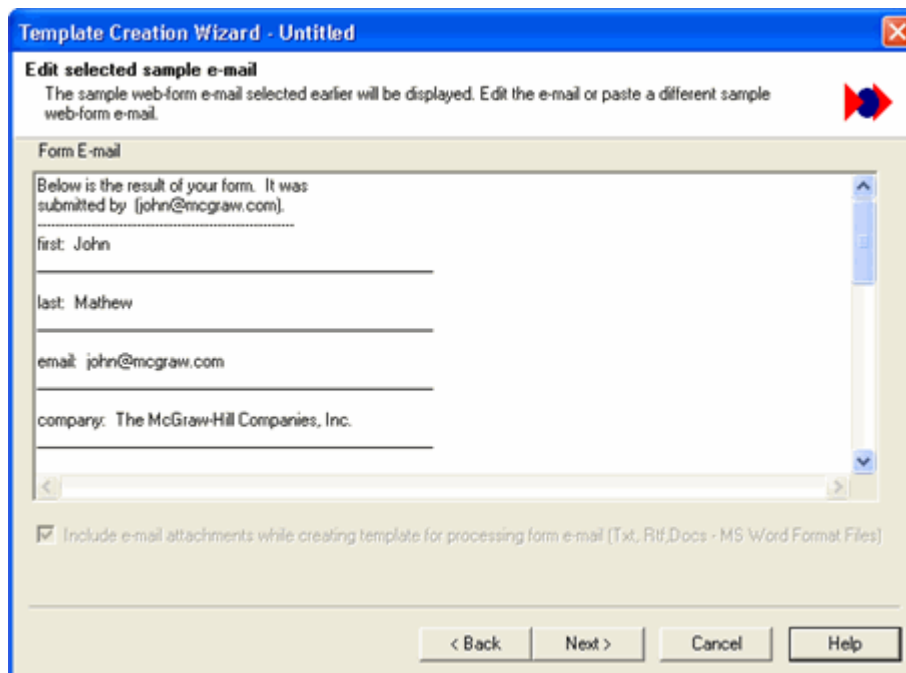
The image shows a 'Template Creation Wizard' dialog box. The title bar is blue with the text 'Template Creation Wizard' and a close button. The main area has a light beige background. At the top, it says 'Template Name' and 'Name the template.' Below this is a large empty space. In the center, there is a label 'Template Name:' followed by a text input field containing the word 'Untitled'. Below the input field, it says 'Example: Order'. At the bottom, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

Figure 20: Enter Template Name

12.2. Edit Sample Email

The next step is to view and edit the email form. The selected email text appears in the wizard.

If you have launched the template wizard by using the **File > Show Template Wizard** option, then the wizard space appears blank. You need to copy and paste your email text that contains all the form tags and data (Refer to [Figure 18](#)).



The image shows a 'Template Creation Wizard - Untitled' dialog box. The title bar is blue with the text 'Template Creation Wizard - Untitled' and a close button. The main area has a light beige background. At the top, it says 'Edit selected sample e-mail' and 'The sample web-form e-mail selected earlier will be displayed. Edit the e-mail or paste a different sample web-form e-mail.' Below this is a large text area with a scroll bar. The text inside the text area is: 'Form E-mail', 'Below is the result of your form. It was submitted by (john@mcgraw.com).', 'first: John', 'last: Mathew', 'email: john@mcgraw.com', and 'company: The McGraw-Hill Companies, Inc.'. At the bottom of the text area, there is a checkbox labeled 'Include e-mail attachments while creating template for processing form e-mail (Txt, Rtf, Docs - MS Word Format Files)'. At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Cancel', and 'Help'.

Figure 21: View and edit the sample Email

You can verify the details and edit them, if required and click **Next**.

12.3. Extract tags from Email

The next step is to extract the form tags from the email.

You can extract the tags by any one of the following methods:

Extract Form Tags Automatically: This option is selected by default. The form tags are extracted automatically from the selected email.

The Form Tag separator is displayed automatically next to **Tag and Field Separator**. You can also enter the tag separator manually. Select the **TAB** checkbox if there is a tab separator appearing in between the form tags and the form data.



Tag Separator is the character that separates the form tag and the form data.

Manual Entry of Form Tags: Select this option to manually enter the form tags from your web form.

XML Form E-mail: This option is selected by default if your form email is in XML format.

Figure 22: Extract form tags

Select the relevant option and click **Next**.

12.4. Customize Anchor Text

The next step is to customize the anchor text. The form tags need to be marked as anchor text for mapping the fields.

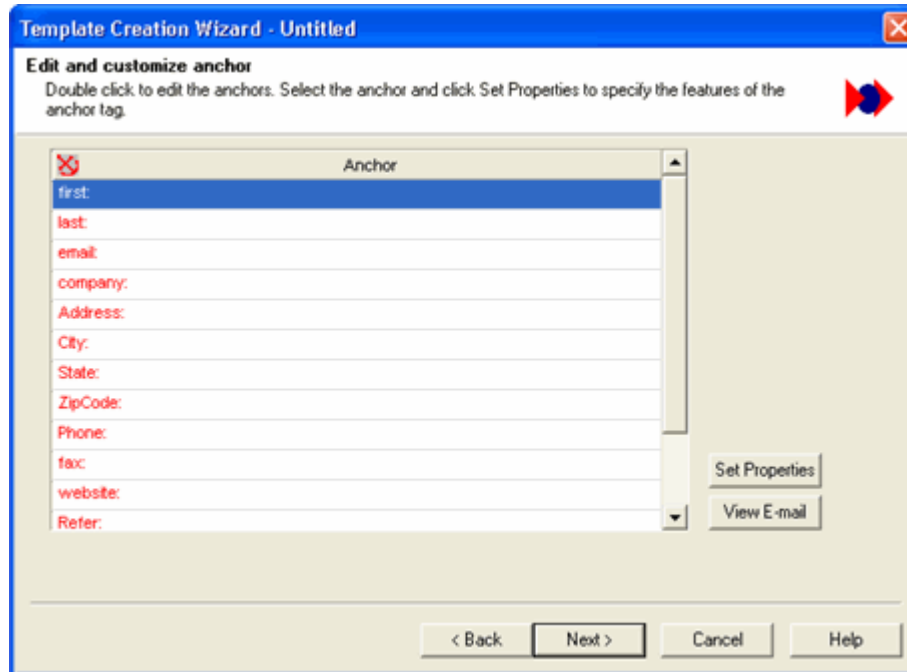


Figure 23: Edit Anchor Text

If you have selected the option **Manual Entry of Form Tags**, you need to enter the anchor text manually. Else, the form tags are marked as anchor text automatically and displayed.

Select an anchor text and click **Set Properties** to define the properties for the anchor text. Refer to [Setup Anchor Properties](#) for more details.

Click **View E-mail** to view the sample email for reference.

After customizing the anchor text, click **Next**.

12.5. Select Destination Application

The next step is to select your destination application.

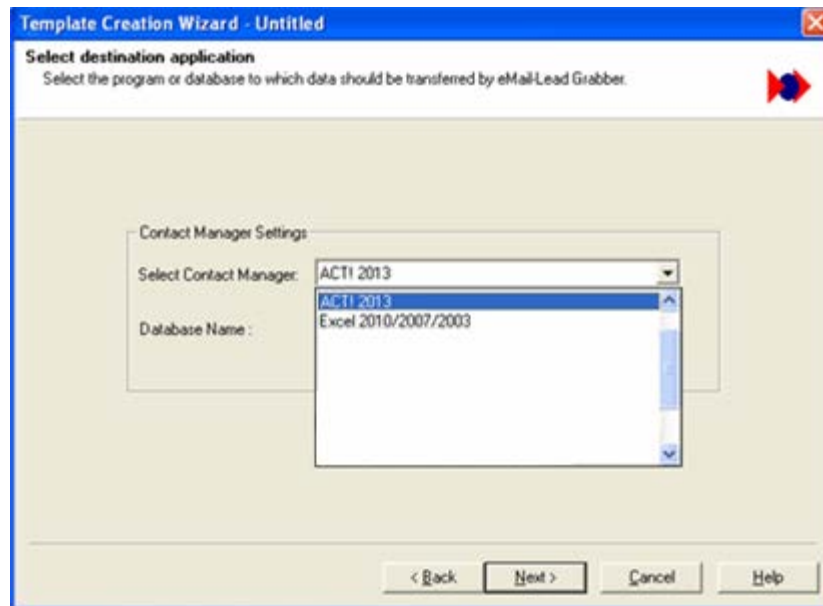


Figure 24: Select Destination Application

Select the appropriate destination application from the **Select Contact Manager** list, and click **Next**.

The next step in the wizard varies according to the selected destination.

The following applications are supported:

- ◆ ACT!
- ◆ Microsoft Excel
- ◆ Microsoft Outlook

12.6. Create Template for ACT!

You can create template for the following versions of ACT!.


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

Select your version of ACT! from the **Contact Manager** list (Refer [Figure 24](#)) and click **Next**.

12.6.1. Login to ACT!

In the next step you need to login to the ACT! database.

Enter the following details in the **Login** dialog box.

- ◆ **Database Path:** Click  and select the Database path of ACT! database. You can also select **Use currently open database** to detect and display the currently opened ACT! database automatically.
- ◆ **UserName:** Enter the login name of ACT! database.
- ◆ **Password:** Enter the password to access your database.

Click **Login** to get access to database.

The message “**Login Successful**” appears in the Result area.

The screenshot shows the 'Template Creation Wizard - ACT' dialog box. The title bar is blue with a close button. The main area is titled 'Database Information' and contains the instruction 'Select the database and provide the login information for the database'. There is a red double-headed arrow icon on the right. The form includes a 'Database File' field with a text box containing 'ents\ACT\ACT For Windows 9\ndatabases\MyDemo.psd' and a browse button. Below it is a checked checkbox 'Use currently opened database'. There are 'Username' and 'Password' text boxes, both containing 'demo'. A 'Result' text box displays 'Login Success'. A 'Login' button is at the bottom right of the form. At the bottom of the dialog are '< Back', 'Next >', 'Cancel', and 'Help' buttons.

Figure 25: Login to ACT!

After logging in successfully, click **Next**.

12.6.2. Select User Fields

The next step is to select the user fields.

The screenshot shows the 'Template Creation Wizard - ACT' dialog box. The title bar is blue with a close button. The main area is titled 'User Fields selection' and contains the instruction 'Please select the user fields. You can map only the selected fields in your template'. There is a red double-headed arrow icon on the right. The form has a section titled 'Please select the fields' containing a table with two columns: 'Field Label' and 'Internal column name'. The table is empty. Below the table are 'Refresh', 'Select all', and 'Clear all' buttons. At the bottom of the dialog are '< Back', 'Next >', 'Cancel', and 'Help' buttons.

Figure 26: Select User Fields

In this dialog box, all the user fields available in ACT! are displayed as Field Label with the corresponding Internal column name.

Click **Refresh** if the user fields are not displayed.

Select the checkbox next to the user fields to map the data from the email message. Click **Select all** or **Clear all** to select or deselct all the user fields.

After selecting appropriate user fields, click **Next**.

12.6.3. Map Fields

The next step is to map the database fields available in your ACT! database.

After mapping the appropriate fields click **Next**.

12.6.4. Map Email Header Information

The next step is to extract the email header information and save them in user fields.

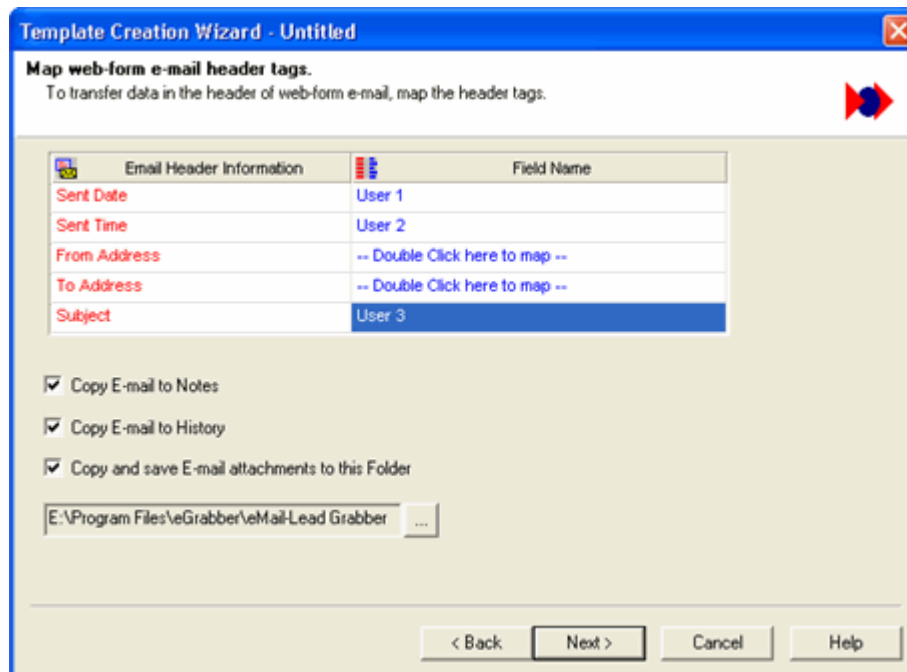


Figure 27: Map Email Header Information - ACT!

You can save the following information from the email:


- ◆ Sent Date.
- ◆ Sent Time.
- ◆ From Address of the email.
- ◆ To Address of the email.
- ◆ Subject of the email message.

Double-click and select the appropriate field to save the above information.

Copy E-mail to Notes: Select this checkbox to copy the contents of the email message to the Notes section of ACT!.

Copy E-mail to History: Select this checkbox to copy the contents of the email message to the History tab of ACT!.

Copy and save E-mail attachments to this Folder: Select this checkbox to save the email attachments.

Click  to browse and select the folder to save the attachment files.

After making appropriate settings, click **Next**.

12.6.5. Setup to transfer company details

The next step is to transfer the company records.

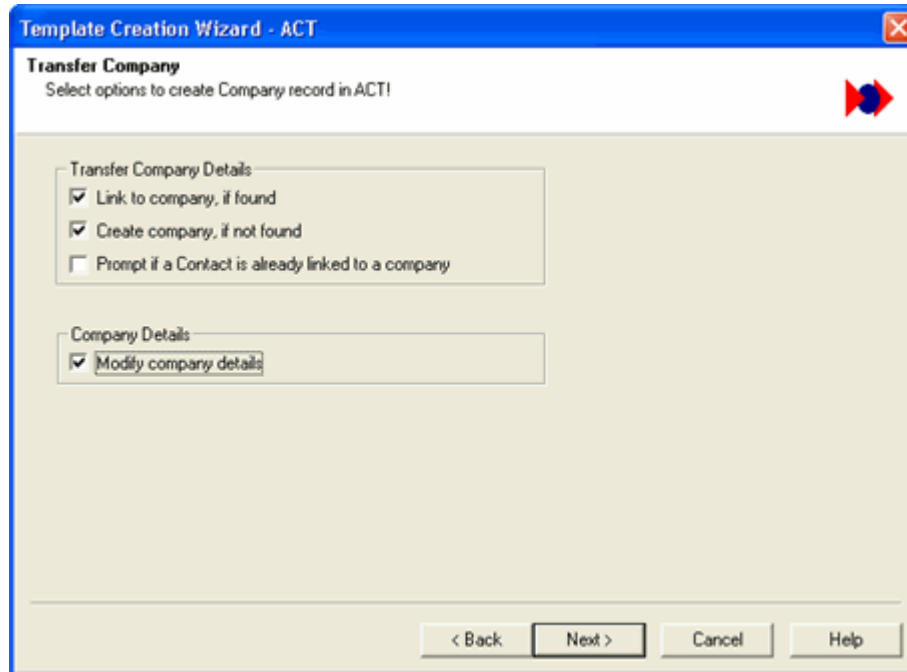


Figure 28: ACT! - Transfer Company Details

You can select the following options:

Link to Company, if found: Select this option to link the contact information to an existing company (if found) in ACT!

Create Company, if not found: Select this option to create a new company (if not found) in ACT! and link the contact information to that company.

Prompt if a Contact is already linked to a Company: Select this option to get a message if the contact is already linked to a company.

Modify company details: Select this option to update the company details on ACT! with the new details being transferred.

After selecting appropriate options, click **Next**.

12.6.6. Setup to check for duplicates

The next step is to setup to check for duplicates.

To handle duplicate records, select any one of the following options:

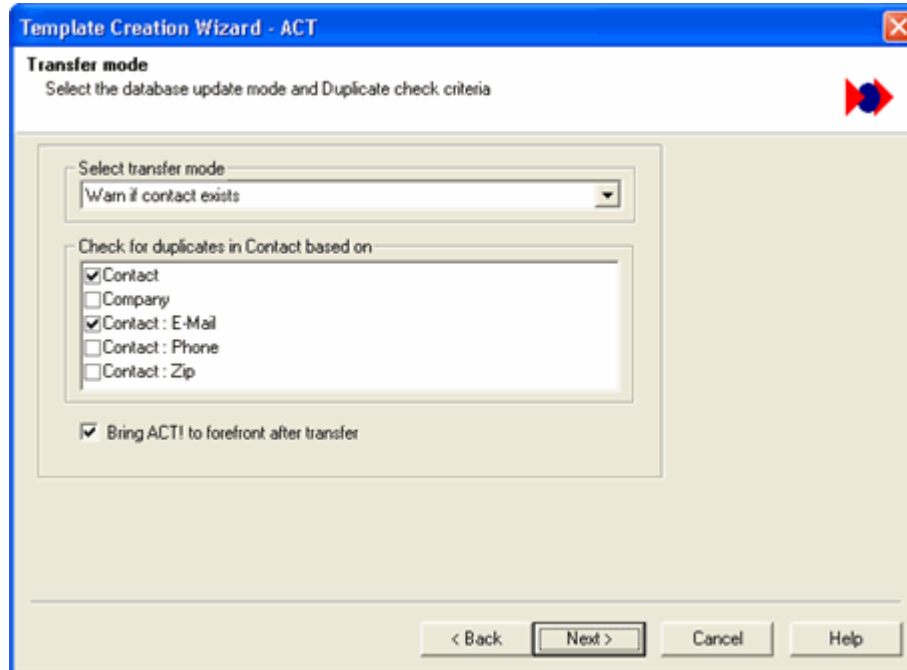


Figure 29: ACT! - Check for Duplicates

Under **Select transfer mode**,

- Select **Add as new** to add the duplicate as a new contact to your application.
- Select **Update if only one contact exists** to update the existing contact in your application. This option updates the contact when only one duplicate contact is available in your database. If more than one duplicate record is found, the transfer process is cancelled.
- Select **Always update first duplicate record** to update the existing contact in your application. This option updates the first found existing record when more than one duplicate record is found.
- Select **Warn if contact exists** to get a warning message when you transfer a duplicate contact to ACT!. During the transfer of a duplicate contact, a Validate Duplicates dialog box appears as shown in [Figure 30](#).
- Select **Cancel if contact exists** to cancel transferring the duplicate record.

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

- **Contact:** Check first and last name of the Contact.
- **Company:** Check the value of the company field.
- **Contact: E-mail:** Check the e-mail address.
- **Contact: Phone:** Check the phone number of the contact.
- **Contact: Zip:** Check the Zip Code of the contact.

Bring ACT! to Forefront after transfer: Select this option to display the contact record after the transfer process.

Validate Duplicates

When you select **Warn if contact exists** option, the **Validate Duplicates** dialog box is displayed when a duplicate contact information is transferred.

In the **Validate Duplicates** dialog box, the existing field values and the new incoming values are displayed in a tabular format. All the contacts with the duplicate values are displayed. You can browse between the contacts and choose to either update the existing contact or add the duplicate as a new contact.

Field Name	Existing Field Value	Field Value in EMail (New)	Select
First Name	John	John	ACCEPT
Last Name	Mathew	Mathew	ACCEPT
Contact	John Mathew	John Mathew	ACCEPT
Company	The McGraw-Hill Compani...	The McGraw-Hill Compani...	ACCEPT
Title			ACCEPT
Department			ACCEPT
Address 1	1221 Sixth Ave.	1221 Sixth Ave.	ACCEPT
Address 2			ACCEPT
Address 3			ACCEPT
City	New York	New York	ACCEPT
State	NY	NY	ACCEPT
Zip	10020	10020	ACCEPT
Country			ACCEPT
Home Address 1			ACCEPT
Home Address 2			ACCEPT
Home City			ACCEPT
Home State			ACCEPT
Home Zip			ACCEPT
Home Country			ACCEPT
Phone	+1 (212) 5122563	212-512-2563	ACCEPT

Creation Date: 01/22/2007 Last Modified: 01/22/2007 ☐ Reject All

Mode of Transfer
☒ Update ☐ Add as New

Transfer Cancel Help

Figure 30: Validate Duplicates

The following details are displayed in the dialog box:

Field Name	Existing Field Value	Field Value in E-mail (New)	Select
Displays all the fields available in the database of your destination application.	Displays the existing values available in your database.	Displays the new incoming values available in the Email Form.	Click to toggle between ACCEPT or REJECT . By default, ACCEPT is displayed.

The **Creation Date** and **Last Modified** display the created and last modified dates of the existing record.


Compare the values, and select the status as **ACCEPT** or **REJECT** to accept or reject the new values.

Select **Reject All** to reject all the changes.

Under **Mode of Transfer**,

- ◆ To update the existing record, select **Update**.
- ◆ To add the incoming values as a new record, select **Add as New**.

Click **Transfer** to transfer the record as per the settings you have made.

 You can click the navigation buttons (<< or >>) to browse the records that contain duplicate values. These buttons are enabled only when the database contains more than one duplicate record.

Click **Cancel** to skip the transfer.

After selecting appropriate mode to check for duplicates, click **Next**.

12.6.7. Schedule and attach Activity

Next, you can setup to schedule activities like “Meetings, Calls” etc for the transferred contacts.

You can attach, schedule, and prioritize activities like “Call, Meeting, To-do” for all contacts transferred to your ACT! database.

The attached activities are displayed in the Activities tab of the transferred contact in ACT! .

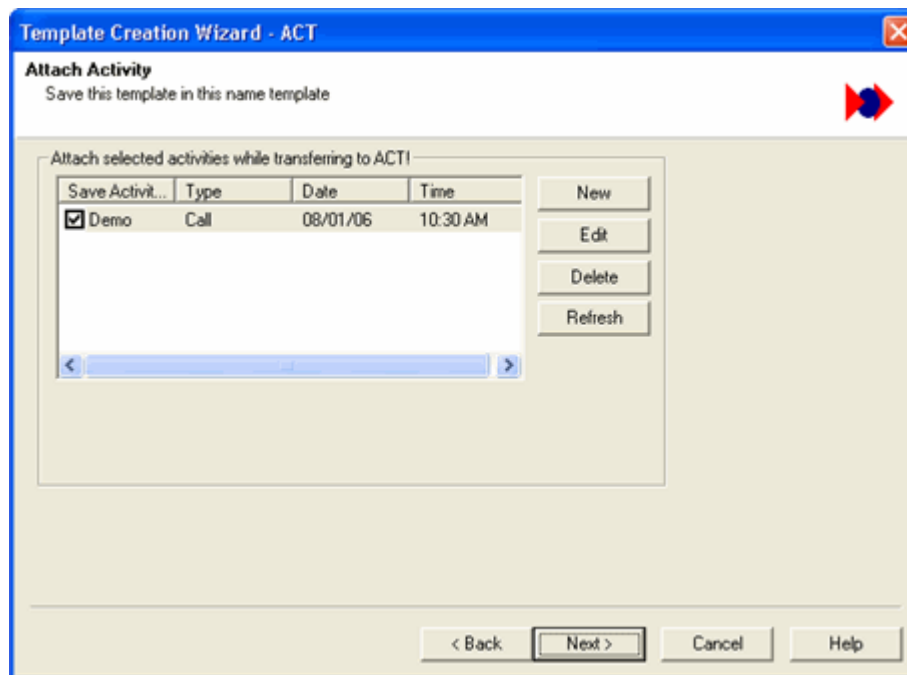


Figure 31: Schedule and attach Activity in ACT!

Click the **New** button to create a new activity. In the **Activity Settings**, setup the following options to create a new activity.

Figure 32: Activity Settings - ACT!

- ◆ **Activity type:** Select activity (Call, Meeting, or To-do) from the list.
- ◆ **No of Days:** Enter the number of days counting from the present day when you want to perform the activity. For Example, type 30 days to execute the activity on the 30th day counting from the present day.
- ◆ **Time:** Enter the time when you want to perform the activity. The current system time is displayed by default. Enter a time or click the down arrow to select time. The **Time** selector displays time slots with difference of 30 minutes.
- ◆ **Duration:** Enter the duration of the activity. For *Example*, if your calls last for 45 minutes, then type 45 in the Duration box.
- ◆ **Scheduled With:** The name of the contact to which you have scheduled the activity is displayed when you transfer records to ACT!.
- ◆ **Regarding:** Select from the list or type a description for the activity.
- ◆ **Priority:** Select **High**, **Medium** or **Low** from the list to prioritize your activity.
- ◆ **Ring alarm:** Set an alarm to remind you of scheduled activity. Select a time from the list. For *Example*: If you select 5 minutes from this list, the alarm pops up 5 minutes before the time at which the activity has been scheduled.
- ◆ **Save activity as:** Enter a name to save the activity.
- ◆ **Confirm before transfer:** Select this option to view the scheduled activity when the contact information is transferred to ACT!
- ◆ **Schedule this activity for:** The existing database user names are displayed in this drop-down list. You can select the user name from this list. The activity is attached to the selected user name.

Click **OK** to save the settings.



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

Click **Refresh** to update the changes made to activities.

To edit an activity:

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

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

To delete an activity:

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

- ◆ Click **Delete**.
- ◆ Click **OK**.

After creating required activities, click **Next**.

The next step is to save the email contents to a text file and attach the file to the destination. Refer to [Attach Email Contents](#) to proceed with subsequent steps.


12.7. Create Template for Microsoft Excel

Select the option **Excel 2019/2016/2013/2010/2007/2003** from the Contact Manager list (Refer [Figure 24](#)) and click **Next**.

In the next step you can select to transfer the information to an existing or new Excel File.

12.7.1. Select an Excel File

Transfer to an existing Excel Workbook: Select this option to transfer contact details 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.

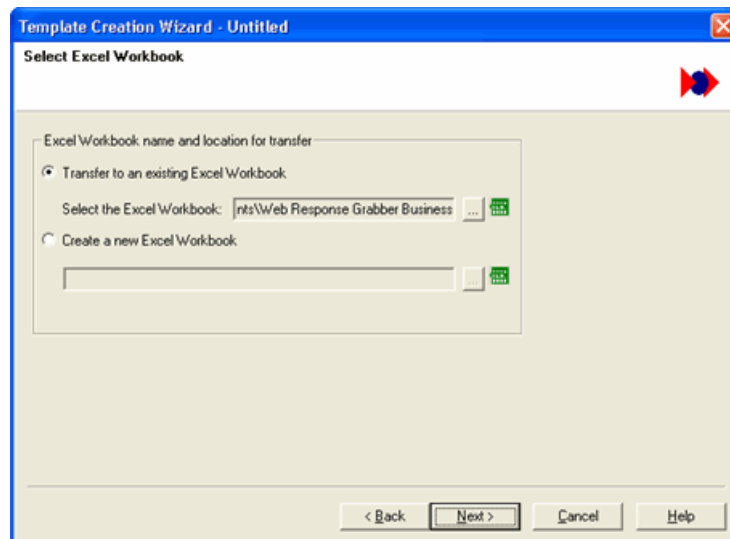


Figure 33: Select / Create Excel File

12.7.2. Select Fields in Excel

When you select an existing Excel file and click **Next**, the **Select Fields** dialog box appears as shown in [Figure 34](#).

The left pane displays all the sheets in the file and the right pane displays the column headings present 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 data from the email form.

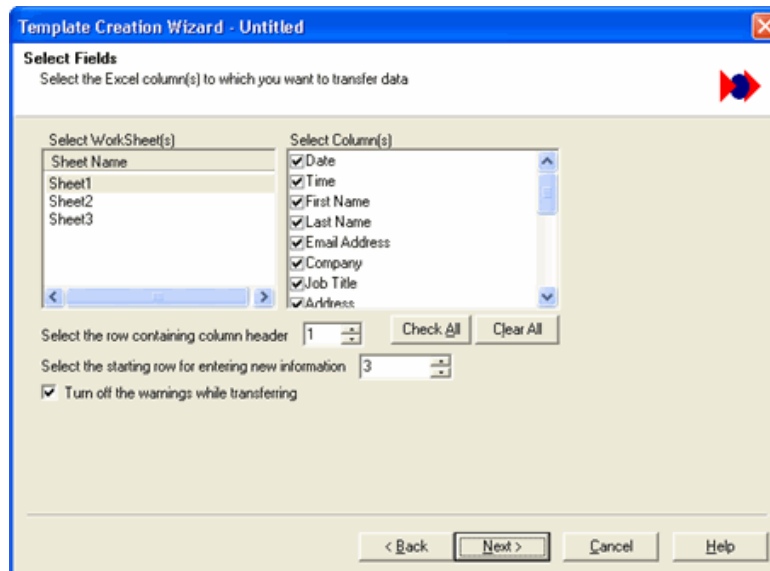




Figure 34: Select Excel Fields

 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 start inserting 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.

A sample excel file is shown in [Figure 35](#) that illustrates the row numbers and column headings.

Row Number that contains Column Headings

	A	B	C	D
1	First Name	Last Name	Email Address	Company
2				
3				
4				
5				

Column Headings

Row Number to start inserting new record

Figure 35: Sample Excel File

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


Clear All: 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 map the fields.

12.7.3. Create an Excel File

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

Click  next to this option.

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

Click **Next** to Create Excel Fields.

12.7.4. Create Excel Fields

After creating a new Excel File, you have to create column headings.

By default, three sheets of the new Excel file are displayed in the left pane.

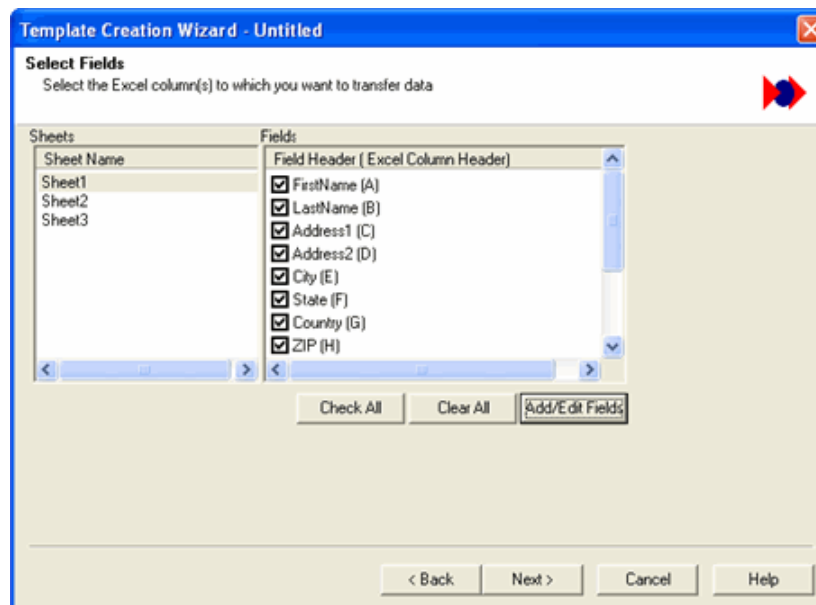


Figure 36: Create Excel Fields

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** dialog box. You can also edit the fields. *Click **OK*** to save the data.



Figure 37: 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.

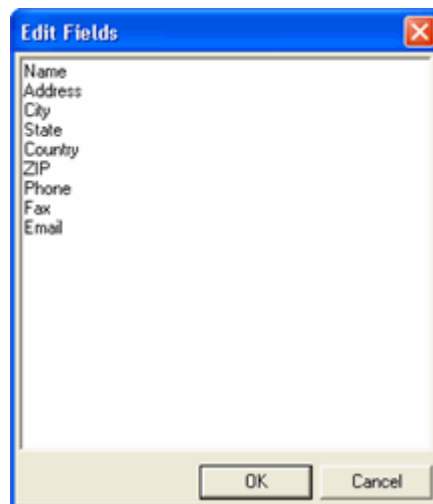


Figure 38: Add / Edit Excel Fields

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

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

Select 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.

12.7.5. Map Fields

The next step is to map the database fields available in your Excel Sheet.

After mapping the appropriate fields click **Next**.

12.7.6. Map Email Header Information

The next step is to extract the email header information and save them in user fields.

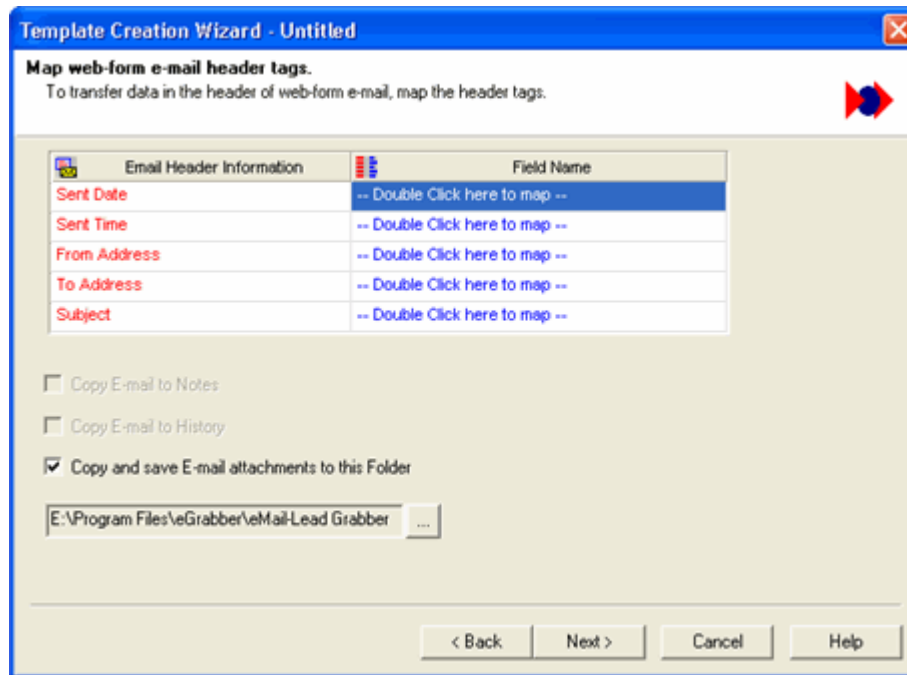


Figure 39: Map Email Header Information - Excel

You can save the following information from the email:


- ◆ Sent Date.
- ◆ Sent Time.
- ◆ From Address of the email.
- ◆ To Address of the email.
- ◆ Subject of the email message.

Double-click and select the appropriate field to save the above information.

Copy E-mail to Notes: This option is not available for Excel.

Copy E-mail to History: This option is not available for Excel.

Copy and save E-mail attachments to this Folder: Select this checkbox to save the email attachments.

Click  to browse and select the folder to save the attachment files.

After making appropriate settings, click **Next**.

12.7.7. Miscellaneous Setup

In the next step select the field to which you can link your email attachment from the drop-down list.

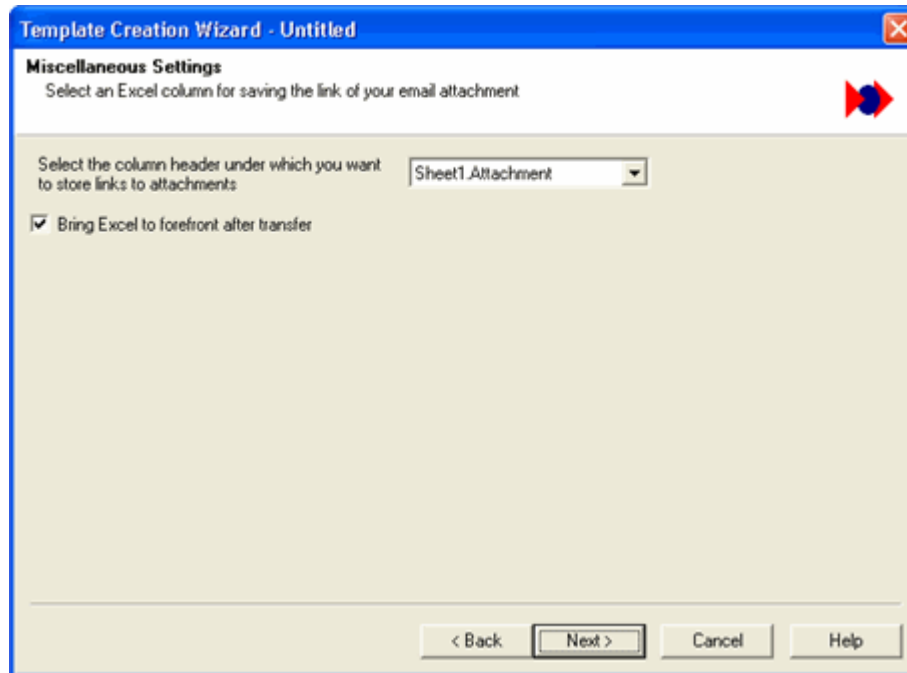


Figure 40: Miscellaneous Settings - Excel

Bring Excel to forefront after transfer: Select this option to display the Excel file with the inserted contact information after transfer and click **Next**.

The next step is to save the email contents to a text file and attach the file to the destination. Refer to [Attach Email Contents](#) to proceed with subsequent steps.

12.8. Create Template for Outlook

Select the option **Outlook 2019/2016/2013/2010/2007/2003** from the Contact Manager list (Refer [Figure 24](#)) and click **Next**.

In the next step, you need to select the Contact folder to transfer the information.

12.8.1. Select Folder

Select the folder that contains the contact records.

Selected Contact Folder: This option displays the default Contact folder that contains your contact information.

Always transfer to selected contact folder: Under this list select the folder where you want to transfer the contact information from email forms.

After transfer, contacts are created in the selected folder.

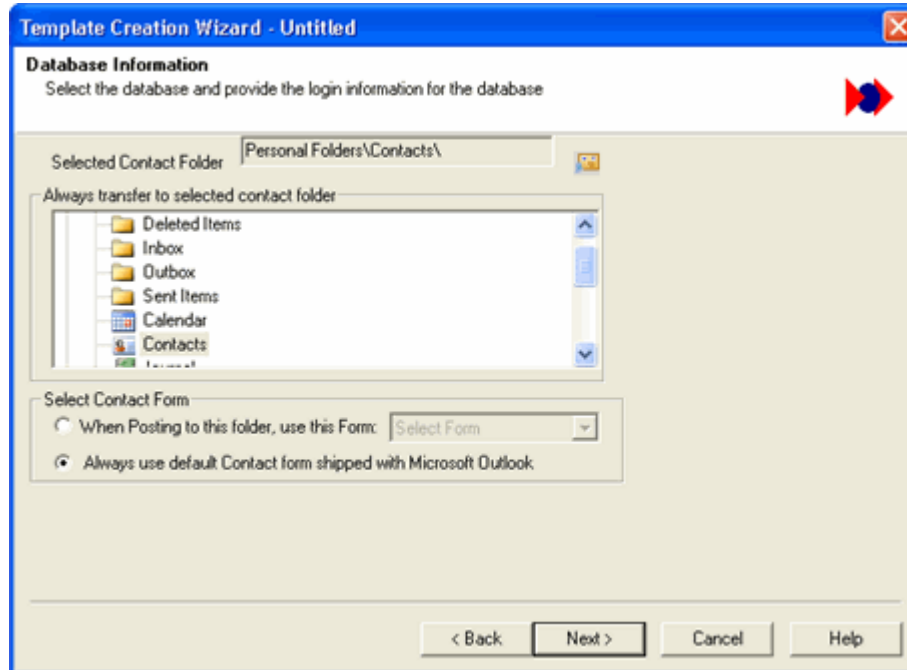


Figure 41: Select Folder in Outlook



The selected folder must contain contact items and must be your default address book in Outlook

Select Contact Form: Every contact folder in Outlook is associated with a form. The form could be your customized form or the default contact form provided by Outlook.

- ◆ **When Posting to this folder, use this Form:** Select your customized form from this list. This customized form is used to create contacts in Outlook.
- ◆ **Always use default Contact form shipped with Microsoft Outlook:** Select this option to use the default contact form to create contacts in Outlook.



Customized forms are listed only when you have used them for creating contacts in Outlook

After selecting relevant options, click **Next**.

12.8.2. Filing Information

In the next step, you can specify the format in which the contact information is filed and displayed.

Select the filing method from the **File As** drop-down list.

Template Creation Wizard - Untitled

Filing Information
Select the filing Method for the contact and default mailing address

File As :

Default mailing address :

< Back **Next >** Cancel Help

Figure 42: Filing Information - Outlook

For example, assume that your email form contains the following values:

- First Name: William
- Middle Name: J.
- Last Name: Stevenson
- Company: eGrabber

This information is filed according to the option you select from the list, as shown in the table below:

Options	Contact Filed in Outlook
Last Name, FirstName MiddleName (This option is selected by default)	Stevenson, William J
FirstName MiddleName LastName	William J Stevenson
Company	eGrabber
LastName, FirstName MiddleName (Company)	Stevenson, William J (eGrabber)
Company (LastName, FirstName MiddleName)	eGrabber (Stevenson, William J)

Default mailing address: Select the address section from this drop-down list. The available options are Business, Home and Other Address. The selected address is set as the mailing address for the contacts.

After selecting relevant options, click **Next**.

12.8.3. Map Fields

The next step is to map the database fields available in your Outlook Address Book.

After mapping the appropriate fields click **Next**.

12.8.4. Map Email Header Information

The next step is to extract the email header information and save them in user fields.

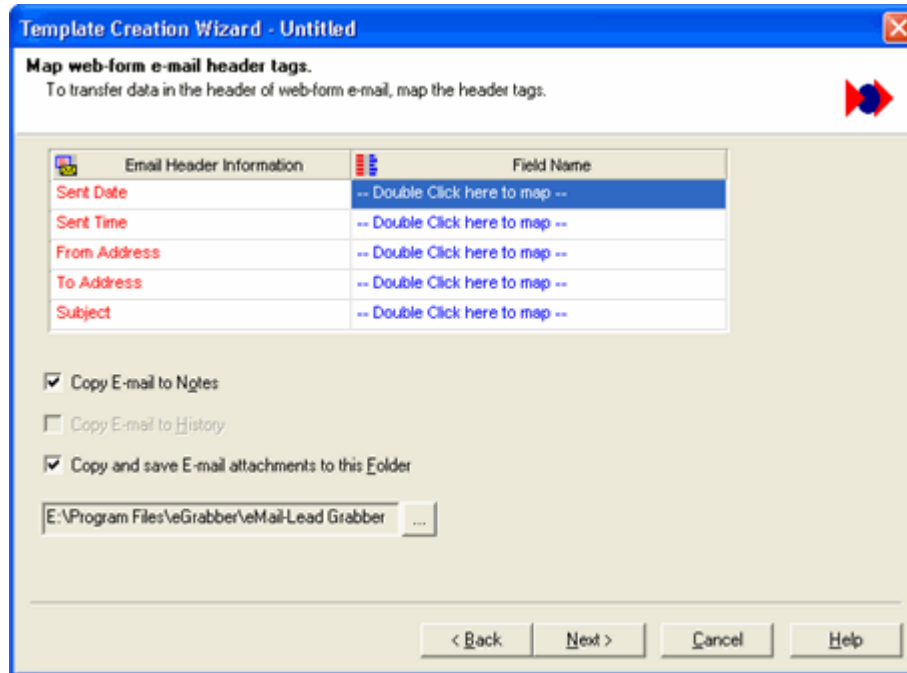


Figure 43: Map Email Header Information – Outlook

You can save the following information from the email:


- ◆ Sent Date.
- ◆ Sent Time.
- ◆ From Address of the email.
- ◆ To Address of the email.
- ◆ Subject of the email message.

Double-click and select the appropriate field to save the above information.

Copy E-mail to Notes: Select this checkbox to copy the contents of the email message to the Contact window in Outlook

Copy E-mail to History: This option is not available for Outlook.

Copy and save E-mail attachments to this Folder: Select this checkbox to save the email attachments.

Click  to browse and select the folder to save the attachment files.

After selecting appropriate fields, click **Next**.

12.8.5. Setup to check for duplicates

The next step is to setup to check for duplicates.

To handle duplicate records, select any one of the following options:

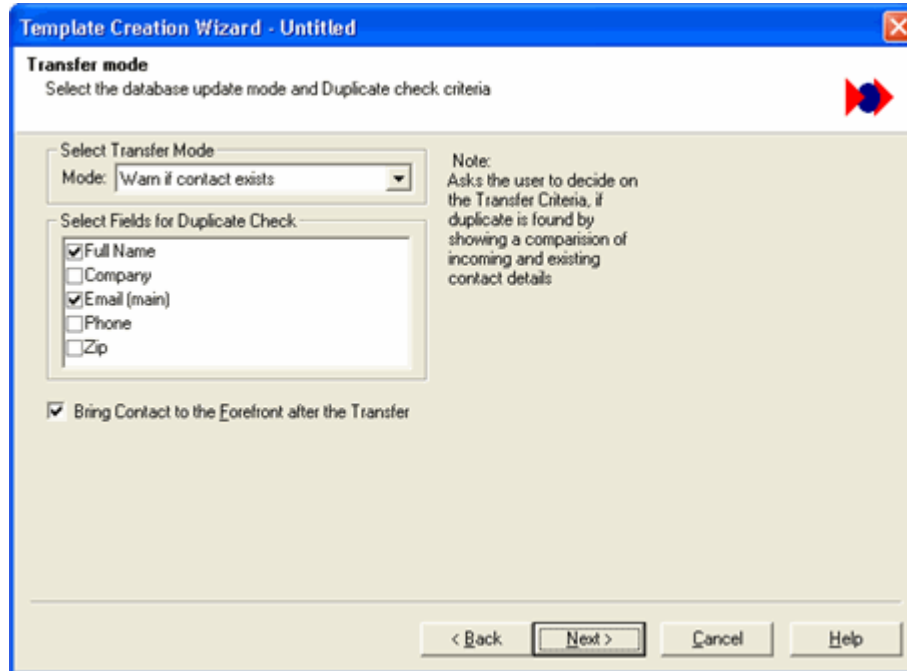


Figure 44: Outlook - Check for Duplicates

Under **Select transfer mode**,

- Select **Always add as a new contact** to add the duplicate as a new contact to your application.
- Select **Update if contact exists** to update the existing contact in your application.
- Select **Warn if contact exists** to get a warning message when you transfer a duplicate contact to Outlook. During the transfer of a duplicate contact, a Validate Duplicates dialog box appears as shown in [Figure 30](#).
- Select **Cancel if contact exists** to cancel transferring the duplicate record.

When you select any of the above options except **Always add as a 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.

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

After selecting relevant options, click **Next**.

12.8.6. Schedule Activity

In the next step you can schedule and attach activities to the transferred contact records.

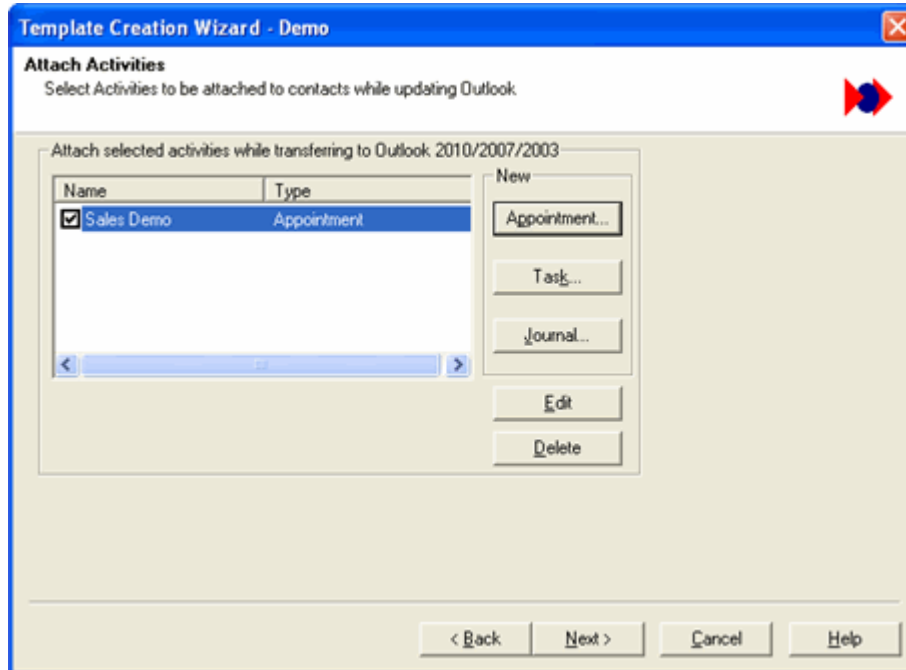


Figure 45: Schedule Activity – Outlook

Schedule Appointments, Journals and Tasks

You can attach and schedule Appointments, Tasks, and Journal Entries 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. You can attach activities for a single or multiple contacts.

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 in the **Appointment Item** dialog box:

Figure 46: 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.

After transfer, this activity is attached and scheduled displaying the name of the transferred contact under Contacts.

To attach a Task:

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

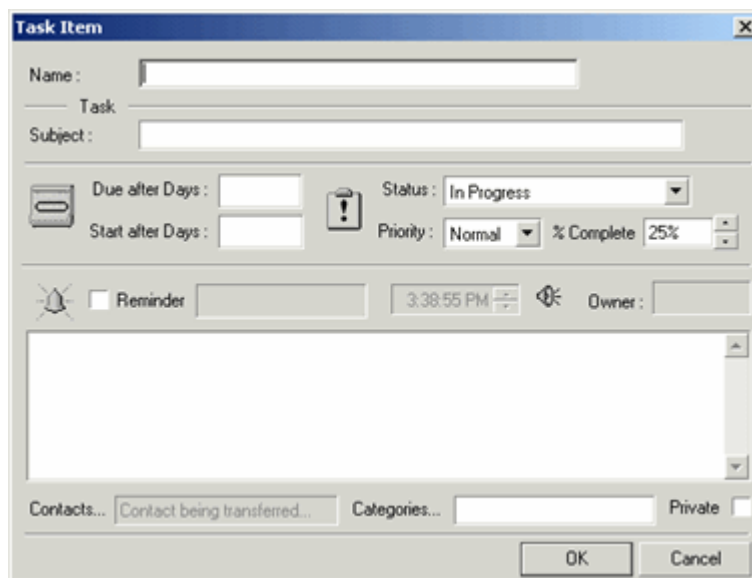


Figure 47: Attach Task in Outlook

- ◆ **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. The Owner's name is displayed under **Owner** in the Task dialog box.

To Attach a Journal:

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

Enter the following details in the **Journal Entry** dialog box:

Figure 48: 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.

As you transfer records to Outlook, this activity is attached and is scheduled displaying the name of the transferred contact under Contacts. The Company name is extracted from the email and is displayed under Company in the **Journal Entry** dialog box.



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

After creating appropriate activities to be scheduled, click **Next**.

The next step is to save the email contents to a text file and attach the file to the destination. Refer to [Attach Email Contents](#) to proceed with subsequent steps.

12.9. Attach Email Contents

You can save the email contents in a text file.

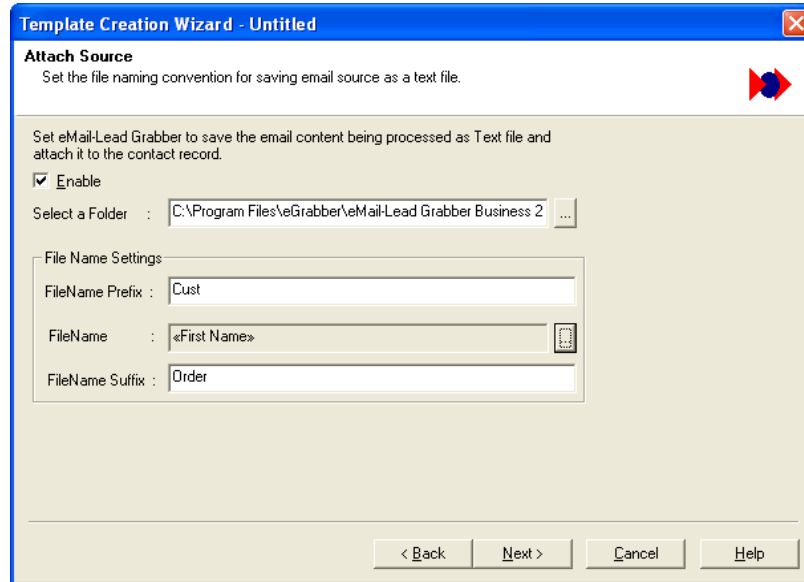



Figure 49: Save the email contents

Select the **Enable** checkbox to make use of the options.


Click  next to **Select a Folder** to browse and select the folder to save the text file.

FileName Prefix: Enter a text to appear before the file name. (Example: Cust)

FileName: Click  to select a database field that is saved as the file name. (Example: FirstName)

FileName Suffix: Enter a text to appear after the file name. (Example: Order)

If the first name is "William", then the file is saved as Cust-William-Order.txt.

 If filename is not specified, then the attachment is saved as "untitled" in the specified folder.

When you transfer multiple form e-mail, the attachment name gets incremented and is saved as Cust-William-Order1.txt, Cust-William-Order2.txt and so on.

The maximum length of a filename can be 50 characters. If the filename exceeds this limit then it is automatically truncated to the first 50 characters.

After selecting relevant options, click **Next**.

12.10. Keyword Search

The next step is to setup to search for specific keywords in the email.

Figure 50: Keyword Search

For example, you can search for keywords related to sales to identify the customers and save the search results in selected fields.

Select the **Enable** checkbox to make use of the options.

Click **New** to create a name for the search. Enter the name and click **OK**.

Under Search Document, you can specify the percentage of the section to be searched.

Enter the starting section as percentage in the **From Top:** box and the end section percentage in the **To:** box. The percentage is calculated based on the number of characters available in the email message.


Under **Keywords**, enter the terms to be searched for in the email message.



Select **Case Sensitive Search** to search for terms that match the upper and lower case letters exactly.

Under **Keyword Matching Criteria**, select the method to search for the keywords.

- ♦ **Any keyword should match:** the result is saved in the selected field if one of the searched keywords is available in the email message.
- ♦ **All keywords should Match:** The result is saved in the selected field only if all the searched keywords are available in the email message.

Under **Store Results of**, select the database fields to save the following search results:

- ♦ **Number of Occurrences:** Click  and select the field to save the number of times the keyword occurs in the email.

- ◆ **Number of Keywords:** Click  and select the field to save the total number of searched keywords.
- ◆ **Keywords:** Click  and select the field to save the searched keywords.

After selecting the relevant options, click **Next**.

12.11. Select Mail Merge Template

The next step is to attach a Mail Merge Template to the created template.

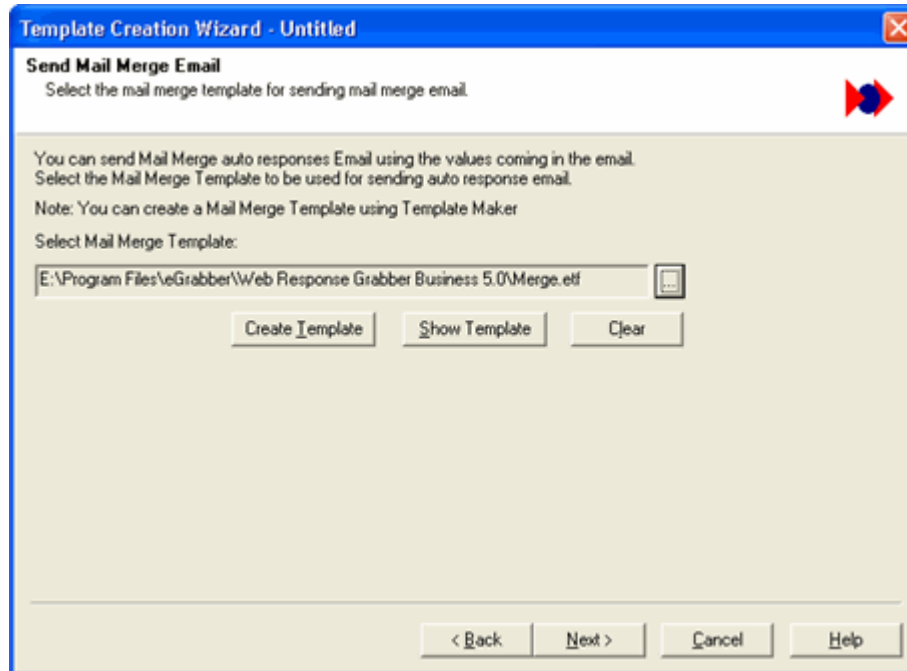



Figure 51: Select Mail Merge Template

- ◆ Click  to browse and select a mail merge template.
- ◆ Click **Create Template** to create a new mail merge template.
- ◆ Click **Show Template** to view the selected template.
- ◆ Click **Clear** to remove the selected template.

Refer to [Chapter 14](#) for more details on Mail Merge Template.

After selecting the relevant template, click **Next**.

12.12. Assign Pre-defined Values

The next step is to assign default values to specific fields.

Field Names	Initialize Field To
Account	Website Feedback Form

Select Field: Pre-Defined Values:

Buttons: Edit, Delete, Add, < Back, Next >, Cancel, Help

Figure 52: Assign default values

Click to select the field and enter the value in **Pre-Defined Values**. Click **Add** to add the values.

Now, whenever you transfer contact information from an email form, the default value is saved in the selected field.

For example, you can assign the value **Website Feedback Form** to the field **Account** in the database.

Click **Edit** to modify the default value and **Delete** to remove the value.

After adding appropriate values, click **Next**.

12.13. Save the Template

The next step is to save the template.

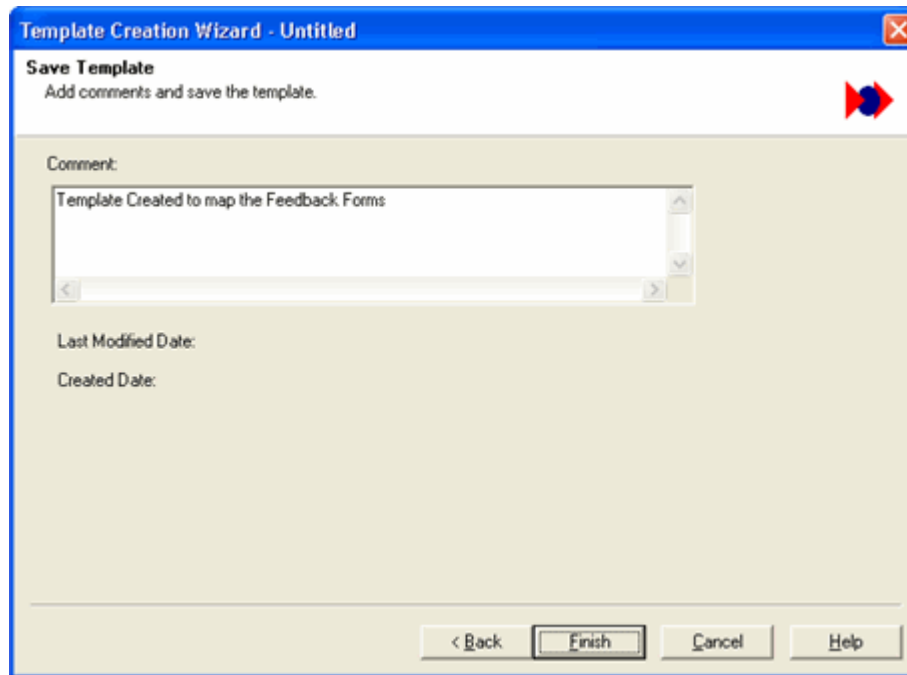


Figure 53: Save the template

Enter any additional information as **Comment** and click **Finish** to save the template.

The template you have created appears under the Form Processing Center in the eMail-Lead Grabber Window.

You can also use the TemplateMaker to create the templates in advanced mode.

13. Create Template in Advanced Mode

Launch the TemplateMaker by any one of the following methods:

- Select any email that contains all the form tags, right-click and select **Create Template in Advanced Mode**. The Create New Template dialog box is displayed. (Refer [Figure 55](#))

[OR]

- Right-Click the Form Processing Center and select **Create Template Advanced Mode**.

[OR]

- Click **File>Show TemplateMaker**.

The **TemplateMaker** window is opened. In this window, click **File>New** to create a template.

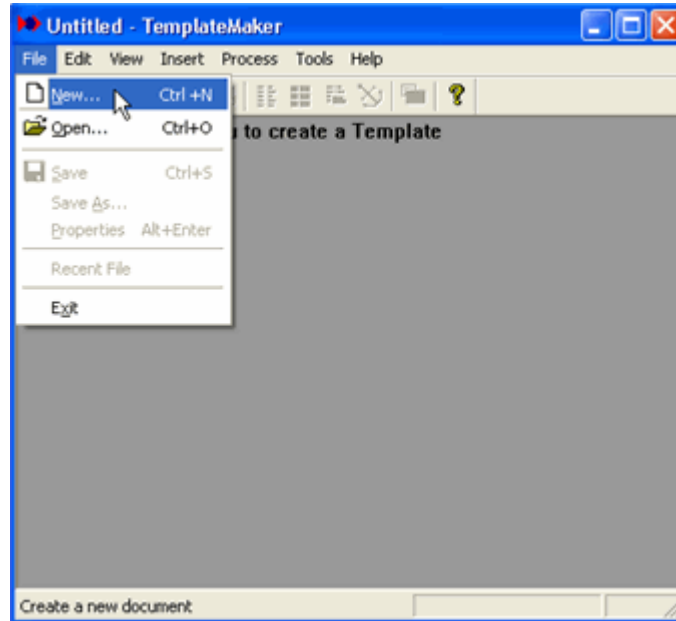


Figure 54: Create Template from TemplateMaker

The **Create New Template** dialog box is displayed.

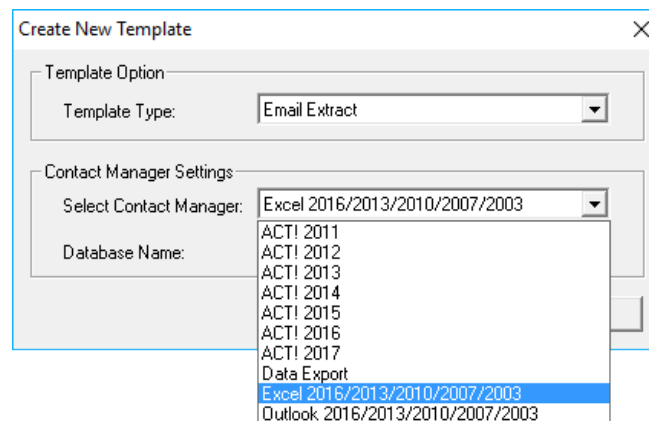


Figure 55: Create Template

From the **Select Contact Manager** list, select your destination application and click **OK**.

The settings are similar to the options explained in Chapter 12 to create a template in wizard mode. The setup options vary according to the selected destination. Refer to the section for creating templates for your destination in [Chapter 12](#).

The difference between creating templates in wizard and advanced mode is mapping the fields. You need to map the form tags as anchor text and the form data as database fields manually while creating a template in advanced mode.

The following section explains the steps to create a template in advanced mode for Data Export and mapping the fields. You can follow the similar method to map fields for other destination applications.

13.1. Create Template for Data Export

In the **Create New Template** dialog box, (Refer [Figure 55](#)) select **Data Export** from the Contact Manager list and click **OK**.



The Data Export option is not available when you create a template in wizard mode.

The **Link Options** dialog box appears where you can setup to export the form data as Comma Separated or Tab Separated values to a text file. This data can be imported to any application that supports these formats.

In the **Data Export Link Options** tab, enter the following:

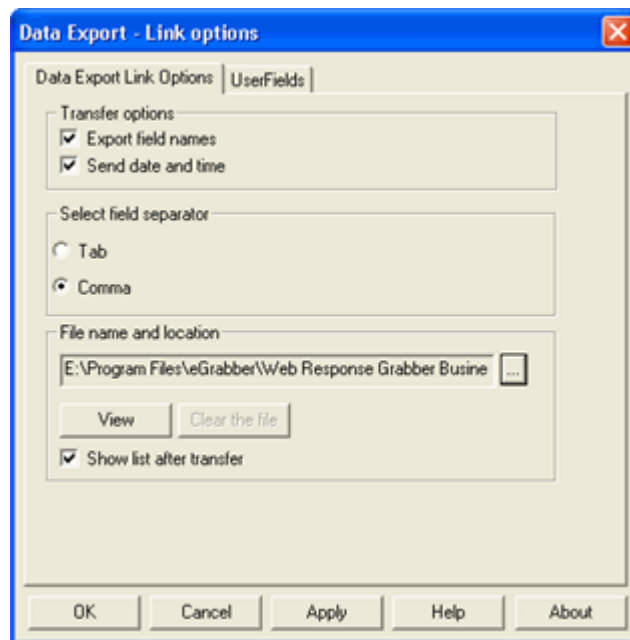


Figure 56: Data Export - Link Options


Under **Transfer Options**, you can select the fields to be exported along with the data.

- ◆ **Export field names:** Select this option to export the field names (*Name, Address, City and so on*) that are saved as headers for the fields in the text file. If you do not want to have headers, clear this option.
- ◆ **Send date and time:** Select this option to export the date and time of transfer.

Under **Select field separator**, you can select the format in which the data is to be transferred.

- ◆ **Tab:** The data is separated by a Tab space and exported.
- ◆ **Comma:** The data is separated by a comma and exported.

Under **File name and location**, you can select the file name and path to save the exported file.

Click  and select the location. Enter the filename and click **Save**.

View: Click to view the file that contains the transferred data. The file displays data only after transfer.

Clear the file: Click to delete the contents of the file.

Show list after transfer: Select this option to open the file after transferring the data.

Click **Apply** to save the settings.



The **Export field names** option is enabled only when the destination file is not containing any data. Click **Clear** to delete the contents of the file so that this option is enabled.

13.1.1. Add or Remove User Fields

eMail-Lead Grabber enables you to create user fields in the CSV file. You can map the user field to fields in your email form and export values to your CSV file.

Example: If the email form contains the field **Referred By**, the field can be mapped to **User1** in the CSV file. During the transfer, the value of the **Referred By** field is transferred to **User1** field in your CSV file.

Click **UserFields** tab in the **Data Export - Link Options** dialog box to add or remove user-defined fields.

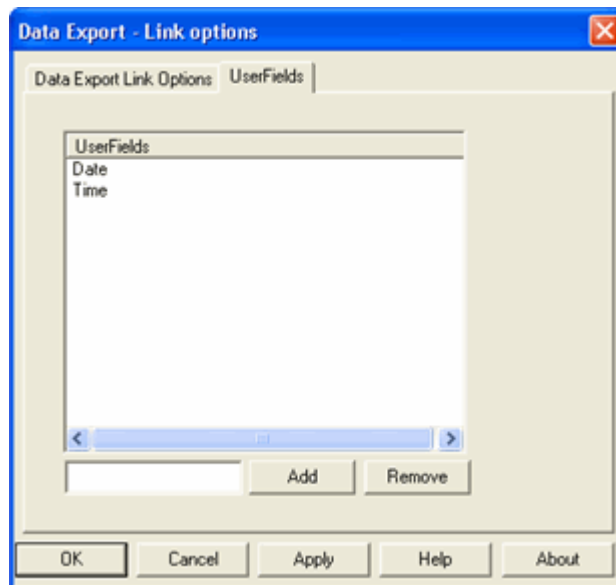


Figure 57: Add or Remove UserFields in Data Export

To Add User Field:

Enter the name of the field in the text box provided before the **Add** button. *Example: Referred By.*

Click **Add**. The field entered is displayed under **UserFields**. Click **Apply** to save.

To Delete User Field:

Select the user field name displayed under **UserFields**.

Click **Remove**. The user field name is removed from **UserFields**.

Click **Apply** to delete.





You can add or delete the user fields only when the destination file is not containing any data. Click **Clear** in the **Data Export Link Options** tab, to delete the contents of the file.

Click **OK** to save the settings and to map the fields.

13.2. Map Fields for Data Export

After you have setup to export to a text file, the selected email text appears in the TemplateMaker. If you have created the template by using the **File > New** option, then the template appears blank. You need to copy and paste your email text that contains all the form tags and data (Refer to [Figure 18](#)) in the template.

In the Template Maker, select the Form Tag including the separator (In the example shown, “:” is the separator). Now click  to mark the form tag as Anchor text.

Select the form data and click  to map the corresponding database field as shown in [Figure 58](#).

The fields you have setup for Data Export are displayed. Select the field to which the Form Data is to be transferred.

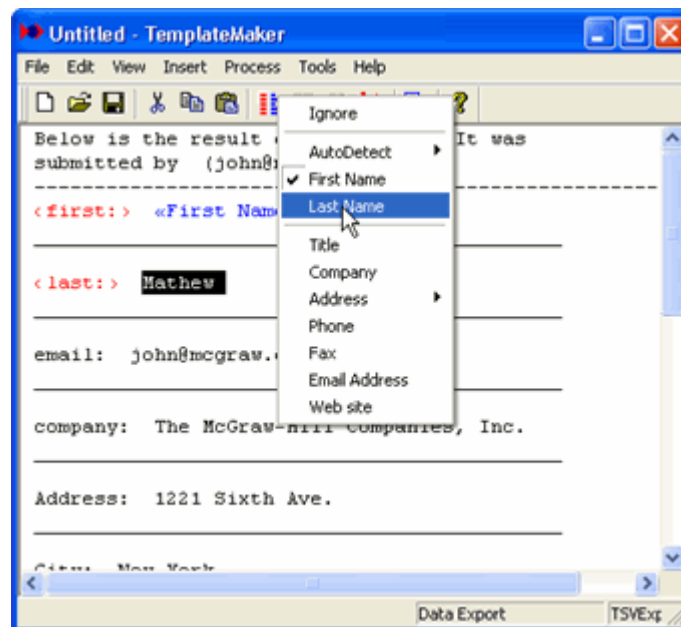



Figure 58: Data Export - Map Fields

After mapping all the tags and fields, click **File>Save** to save the template.

Enter a name for your template and click **OK**.

 You can use the same procedure to map the fields for other destinations.

Close the Template Maker and you can find the name of the template being displayed under the Form Processing Center in the eMail-Lead Grabber window.

Next, you can setup a Filter to transfer the messages to relevant templates.

14. Mail Merge Template

You can create a template to send automatic reply to the email messages processed by your templates. This automatic reply can be customized for every prospect by using the concept of mail merge.

To create a mail merge template, click **File > New** in TemplateMaker. In the **Create New Template** dialog box, select the Template Type as **Email Merge** and select your destination from the Contact Manager list.

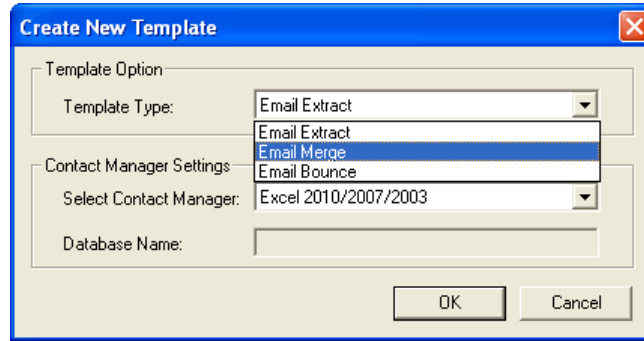



Figure 59: Select Template Type

According to the selected destination, the **Link Options** dialog box appears and you need to fill in the details. These options are discussed under the Create Template in Wizard Mode section. Refer [Chapter 12](#) for details on the Link Options for your destination.

After you complete the Link Options, a blank template appears and you need to enter the pre-defined message in this window.

Click  Insert Field Icon to insert the fields from your database in appropriate places as shown in [Figure 60](#).

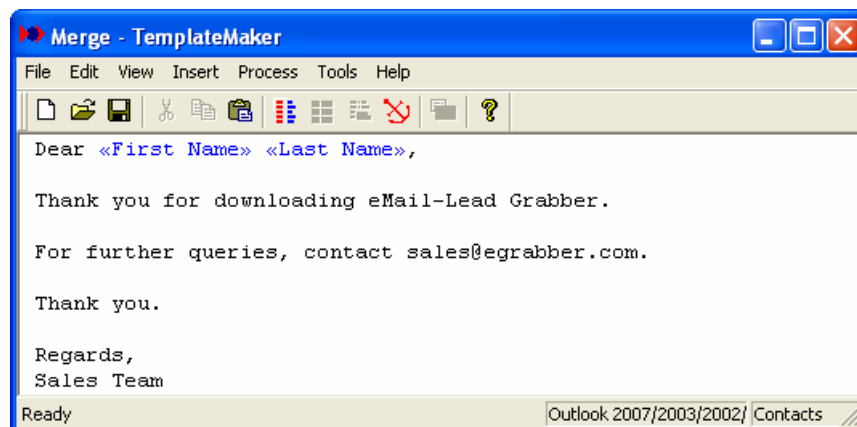


Figure 60: Mail Merge Template

To insert the details from the received message, click **Insert > Email** and select the appropriate options as follows:

- ◆ **Text:** To insert the contents of the received message.
- ◆ **Subject:** To include the subject line of the received message.
- ◆ **Date and Time:** To include the date and time.

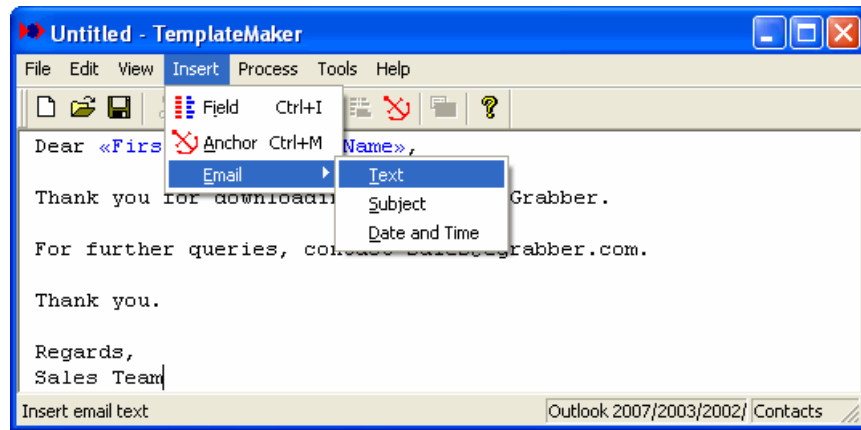


Figure 61: Insert details from received Email in Merge Template

For every received message, the Merge Template sends an automatic customized reply.

You can attach the Merge Template to the Email Extract Template so that whenever a message is processed by the template, a reply message is sent automatically. Refer to [Chapter 12.13](#) for details on attaching the Merge Template to Email Extract Template.

15. Bounce Template

Your email to a prospect may be bounced sometimes due to various reasons. If the email is bounced because the email ID is invalid, then you need to delete the invalid email ID from your contact manager to avoid future correspondence.

You can create an Email Bounce Template and transfer the bounced email using this template. This template automatically identifies and deletes the invalid email ID from your contact manager.

To create a Bounce Template, click **File > New** in TemplateMaker. In the **Create New Template** dialog box, select the Template Type as **Email Bounce** and select your destination from the Contact Manager list (Refer to [Figure 59](#)).

You can create a Bounce Template for the following destination applications only:

- ◆ ACT!
- ◆ Outlook

15.1. Bounce Email Settings

The Link Options dialog box appears according to the selected destination. After you login to the database and enter other settings, the Bounce Mail Option dialog box appears as shown in [Figure 62](#).

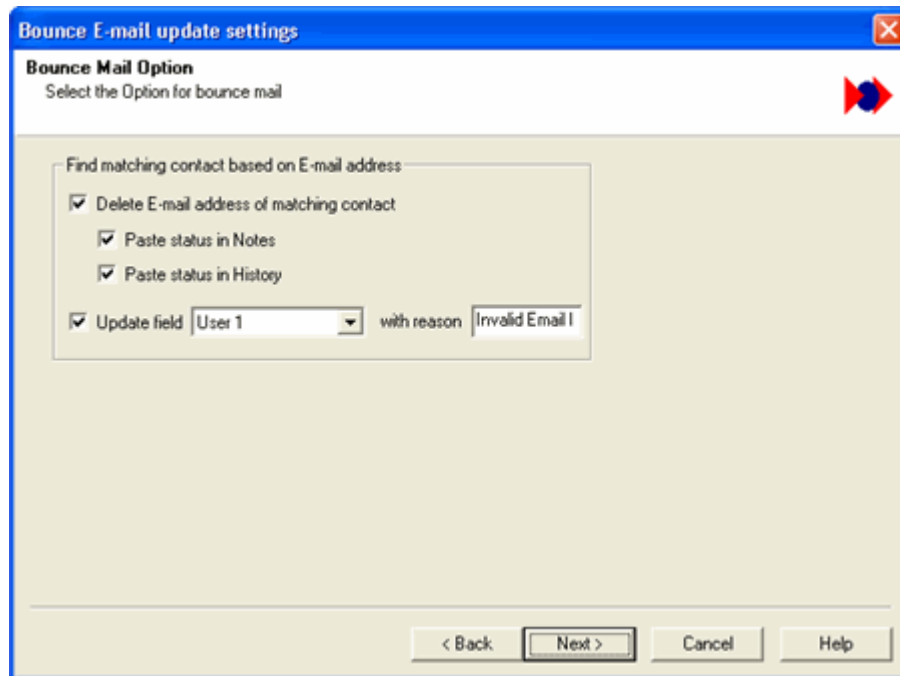


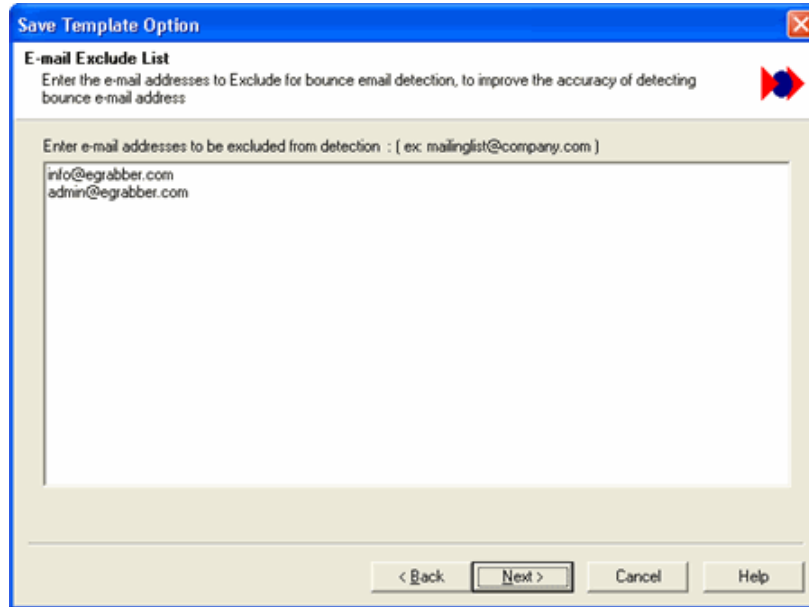
Figure 62: Bounce Email Settings

In this dialog box, enter the following details.

- ◆ **Delete E-mail address of the matching contact:** Select this checkbox to remove the invalid email ID from your database.
 - a. **Paste status in Notes:** Select this checkbox so that the changes are saved in the **Notes** section for future reference.
 - b. **Paste status in History:** Select this checkbox so that the changes are saved in the **History** section for future reference. This option is not available for Outlook.
- ◆ In the **Update Field** drop-down list, select the database field where you can save the reason for deleting the email ID. Enter the reason in the **With Reason** field. For example, save the reason as 'Invalid Email ID' in the 'User 1'.
- ◆ Click **Next**.

15.2. Exclude Email List

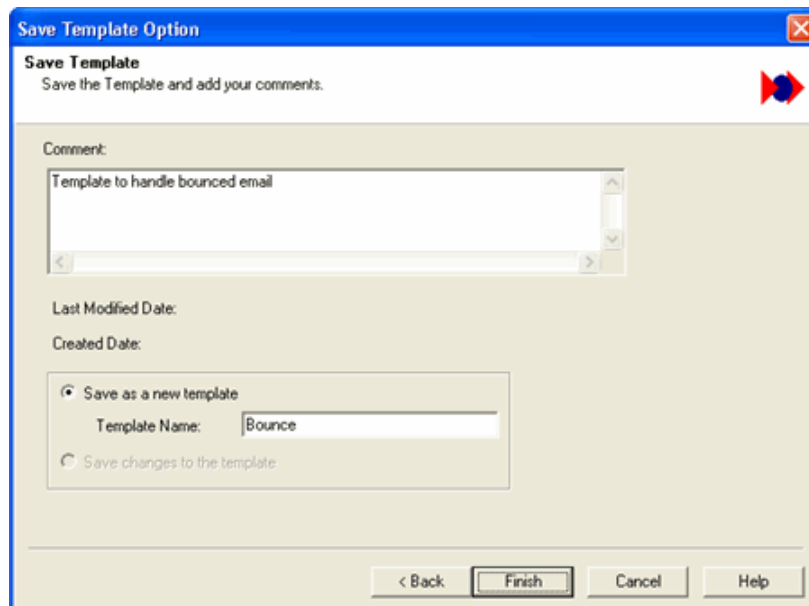
In the Next dialog box, you can enter the Email Ids that can be excluded from the list of bounced email.



The dialog box is titled "Save Template Option" and has a sub-header "E-mail Exclude List". Below the sub-header, it says "Enter the e-mail addresses to Exclude for bounce email detection, to improve the accuracy of detecting bounce e-mail address". There is a text area with the prompt "Enter e-mail addresses to be excluded from detection : [ex: mailinglist@company.com]" and two example email addresses: "info@egrabber.com" and "admin@egrabber.com". At the bottom, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

Figure 63: Email Exclude List

The email IDs entered in this list are not deleted from the database even if they are bounced. Click **Next** and the **Save Template** dialog box is displayed.



The dialog box is titled "Save Template Option" and has a sub-header "Save Template". Below the sub-header, it says "Save the Template and add your comments." There is a text area for "Comment:" with the text "Template to handle bounced email". Below the text area, there are labels for "Last Modified Date:" and "Created Date:". There are two radio buttons: "Save as a new template" (which is selected) and "Save changes to the template". Below the "Save as a new template" radio button, there is a label "Template Name:" and a text box containing the word "Bounce". At the bottom, there are four buttons: "< Back", "Finish", "Cancel", and "Help".

Figure 64: Save the Bounce Template

Enter your comments and a name for the template and click **Finish** to save the template.

Now this Bounce Template appears under the Form Processing Center.

Whenever you receive a bounced email, drag and drop the email to the Bounce Template. This template searched for a matching contact in your database, deletes the email ID and saves the changes in the Notes section.

This avoids any future correspondence with the invalid email ID when you are using merge template for sending messages all the contacts.

You can also setup a filter that identifies the bounced email and transfers the message to the Bounce Template.

16. Working with TemplateMaker

The TemplateMaker window contains the following to process the templates.

- ◆ Menu bar
- ◆ Toolbar
- ◆ Status bar

You can make use of the above components to create, edit or delete the templates. You can test a template for proper mapping of fields.

You can also setup the properties of the Anchor text and the Field mapped by using the Template Maker.

Refer to [Figure 65](#) that illustrates TemplateMaker with a template created for ACT!.

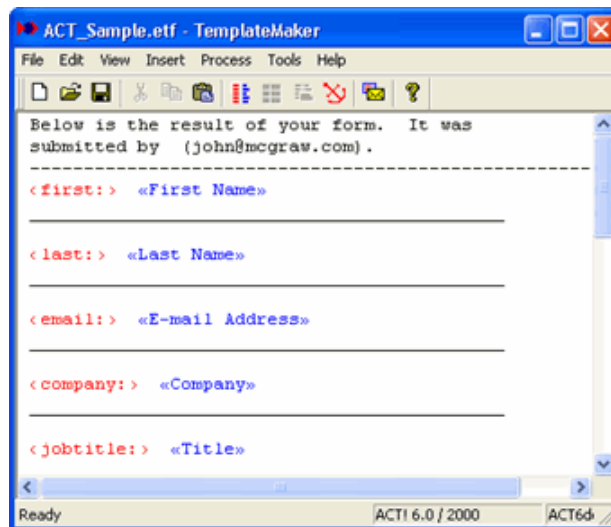


Figure 65: TemplaterMaker

16.1. TemplateMaker - Menu Bar

The TemplateMaker menu bar contains the following commands:

File Menu

Option	Function
New	Create a new template.
Open	Open an existing template.
Save	Save a template.
Save As	Save template with a different name.
Properties	Displays details about the template like Location, Size, Database etc.
Exit	Quit TemplateMaker.

Edit Menu

Option	Function
Undo	Reverts the last performed action.
Cut	Removes the selected text and places it in the Clipboard.
Copy	Copies the selected text to the Clipboard.
Paste	Inserts the contents of Clipboard.
Select All	Select all the contents in the Template.
Find	Search for a specific text in the Template.
Find Next	Look for the next occurrence of the searched text in the Template.

View Menu

Option	Function
Toolbar	Show or hide the Toolbar.
Status bar	Show or hide the Status bar.
Anchor Properties	Select Anchor text to enable this command. You can modify the properties of the selected Anchor text.
Field Properties	Select the Field text to enable this command. You can modify the properties of the selected database field.

Always On Top	To display TemplateMaker in front of all open windows.
---------------	--

Insert Menu

Option	Function
Field	Insert database fields
Anchor	Insert Anchor text.
Email	Insert E-mail fields to create E-mail Merge Template.

Process Menu

Option	Function
Refresh database	Update the database settings.
Extract from Email	Extract additional information from the email text and save them in the user fields. The email text can be saved to Notes tab.
Duplicate Check	Setup to check for duplicates. This option is enabled for ACT! and Outlook templates only.
Set Process	Attaches automated processes.
Lead Source	This feature is currently not available.
Set Activity	Schedule activities while transferring contact records. This option is enabled for ACT! Outlook templates only
Email Header	Setup email header values in an Email Merge Template.

Tools Menu













Option	Function
Mark Form Identifier	Set an identifier text for the template to process an email. Once the identifier text is set, a message that contains the identifier text alone is processed by the template.
Set/ Change Password	Setup a password for the template.
Test Template	Test the template with a sample email for appropriate mapping of fields.
Delete Templates	Delete the selected template.
Options	Launches the Options dialog box to change the settings.

Help Menu

Option	Function
Help	Launches Help Topics.
Send Template	If you encounter any problem with a template, click here to send the template attached to an email message to eGrabber support. Our support team would contact you to solve the problem.
About TPLMaker	Displays information like version number, copyright and license details.

16.2. TemplateMaker – Toolbar

The TemplateMaker **Toolbar** contains the following commands:

Option	Function
	Create a new template.
	Open an existing template.
	Save a template.
	Removes the selected text and places it in the Clipboard.
	Copies the selected text to the Clipboard.
	Inserts the contents of Clipboard.
	Insert database fields.
	Select Anchor text to enable this command. You can modify the properties of the selected Anchor text.
	Select the Field text to enable this command. You can modify the properties of the selected database field.
	Insert Anchor text.
	Extract additional information from the email text and save them in the user fields. The email text can be saved to the Notes tab.
	Launch Help.



The options available in the Menu bar and the Toolbar can also be accessed when you right-click the template.

16.3. TemplateMaker – Status Bar

The TemplateMaker Status bar displays the following details:

- ◆ Name of the destination application.
- ◆ Database Name or File Name to which the email data is to be transferred.

17. Customize TemplateMaker

You can customize the TemplateMaker settings to extract additional information from the email message, to setup the anchor text properties, database field properties, setup a password to protect the template etc.

17.1. Extract from Email

To extract and save additional information from the email message,

- ◆ Click **Process > Extract from Email**

[OR]

- ◆ Click  in the toolbar.

In the **Extract From Email** dialog box that appears, make the following settings:

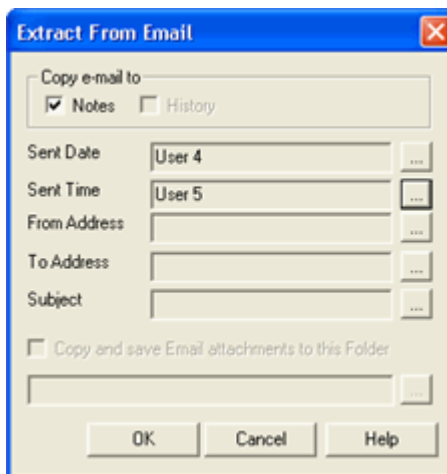



Figure 66: Extract from Email

Notes: Select this checkbox to save the email text in the **Notes** tab of selected database. If you are transferring to Excel or Data Export, you can save the email text to a specific column in Excel or specific location in the text file.

The additional information like date, time, sender's email address, TO address, subject text can be saved to user fields in your destination application.


Click  next to the additional details displayed in the dialog box to select the user field. While transferring, the additional information is transferred to the selected user field.

Click **OK** to save the settings.

17.2. Setup Anchor Properties

Some form tags may contain additional characters. You can mark the form tags as anchor text, and setup the anchor properties to search for these additional characters.

For Example, if your form tag appears as **<first>**, then the symbols **<** and **>** are the leading and trailing characters respectively. While transferring, the template needs to identify the text containing these characters. You can setup the leading and trailing characters in the Anchor Properties.

To setup the properties for anchor text, select the text and click  or click **View > Anchor Properties**.

In the **Properties** dialog box that appears, enter the following:

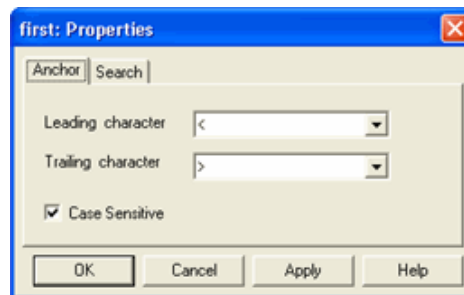


Figure 67: Anchor Properties

Leading Character: Enter the character that appears before the form tag. Example: **<**

Trailing Character: Enter the character that appears after the form tag. Example: **>**

Case Sensitive: Select this checkbox to search for form tags that match the upper and lower case letters exactly.

Click **OK** to save the settings.

Now the template automatically searches for form tags that contain the special characters and transfers the data accurately.

17.3. Search by using Percentage

You can search for a certain section of the email message for the form tags and transfer the details. Use this option when your email text contains information other than form tags. Enter the percentage of the section to be searched by the template in the **Search** tab of the **Properties** dialog box.

Enter the starting section as percentage in the **From Top:** box and the end percentage in the **To:** box. The percentage is calculated based on the number of characters available in the email message.

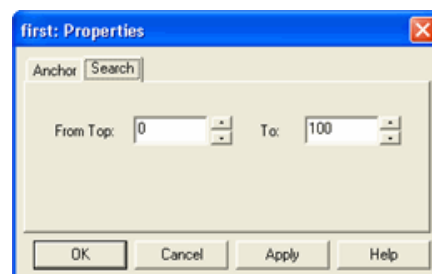


Figure 68: Search Properties

Click **OK** to save the settings.

Now the template searches for form tags available in the specific section and transfers the details. This saves time when your email form contains additional information that can be excluded while transferring to your application.

17.4. Setup Field Properties

You can setup the properties for the database fields to ensure that they are transferred with specific details accurately.

You can setup the maximum field length, field type, format and other attributes.

Select a database field and click  or click **View > Field Properties**.

In the Properties dialog box that appears, you can setup the following:

17.4.1. Size

By default, the **Size** tab appears when you open the **Properties** dialog box.

Enter the following to limit the size of the data to be transferred:

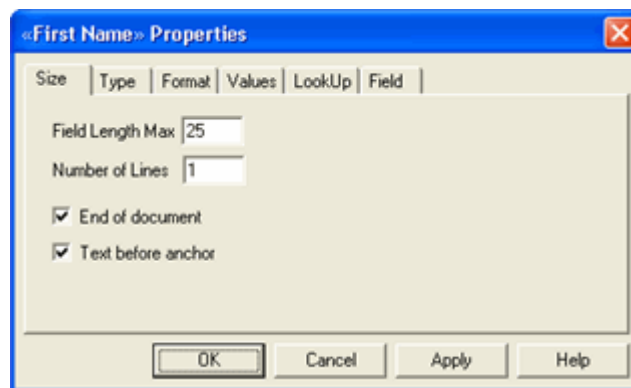


Figure 69: Properties - Size

Field Length Max: Enter the maximum number of characters to be transferred for the selected field. For example, if you enter 15 in this box, then the first 15 characters of the form data are transferred to the selected field.

Number of Lines: Enter the number of lines used by your form data. If your form data is wrapped to two lines, then enter the value as **2**, to transfer the entire data. If you enter the value as **1**, then the data that appears in the first line of the form alone is transferred.

End of document: Select this checkbox to include all the data that appear after the selected field till the end of the form.

Text before anchor: Usually, the form data appears after the form tag. You mark the form tag as anchor and the form data as field. If your email form is containing the form data followed by the from tag, then select this checkbox.

For example, if your form contains data as follows:

William: FirstName.

In the above example, William is the form data and FirstName is the anchor. The value **William** is to be transferred to the database field. Select the **Text before anchor** option to ensure that the data is transferred properly.

Click **OK** to save the settings.

17.4.2. Type

In the **Type** tab, you can setup the data type of the field. You can ensure that you are transferring only appropriate data to your application.

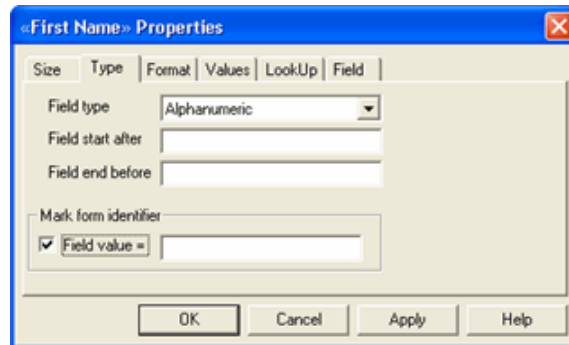


Figure 70: Properties - Type

Field Type: Select the appropriate data type of the field being transferred. For example, if you setup the Phone field type as Numeric, and the field in email form contains alphabets, then the corresponding data is not transferred.

Field start after: Enter the character that you want to exclude from a form data that appears prior to the data while transferring to particular field. For example, if the form data contains a value **\$1000** and you want to transfer only the value **1000** excluding the character **\$**, then enter **\$** in this box.

Field end before: This option is similar to the previous one. Enter the character that you want to exclude from a form data that appears after the data while transferring to particular field. For example, if the form data contains a value **1000#** and you want to transfer only the value **1000** excluding the character **#**, then enter **#** in this box.

You can mark a value for a particular database field so that the email message is processed only when the field contains specific value. For example, you can process the message only if the field Company contains the value eGrabber.

Under **Mark Form identifier**, select the **Field value** checkbox to enter the value **eGrabber** in the text box. Refer to [Mark Form Identifier](#) section for marking a text from any part of the email message.

Click **OK** to save the settings.

17.4.3. Format

Click the **Format** tab to format the data being transferred. You can setup to transfer the data in specific format.

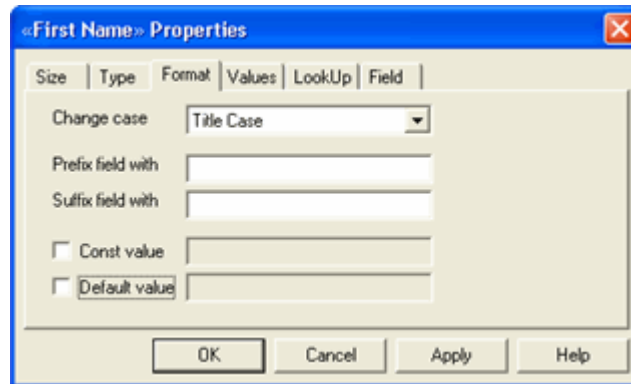


Figure 71: Properties – Format

Change case: From the drop-down list, select the format in which the field value is to be transferred. 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 Case	EGRABBER INC.
Lower Case	egrabber inc.
Sentence Case	Egrabber inc.
Title Case	Egrabber Inc.

The value is transferred in the selected format to the database field.

Prefix field with: Enter a text that is added before the transferred data. For example, you can add salutation (like Mr. / Ms./ Dr.) to a name as prefix. The name is transferred with the added salutation.

Suffix field with: Enter a text that is added after the transferred data. For example, you can add the currency symbol "\$" after a number being transferred.

Const value: You can setup a constant value for a specific field. This value is automatically saved in the specified field, independent of the data contained in the email form. Select this checkbox and enter the constant value in the box.

Default value: You can setup a default value for a specific field. When the email form is not containing any data for this field, then the default value is saved in this field.

Click **OK** to save the settings.

17.4.4. Values

In the **Values** tab, you can replace a value with relevant data.

For example, if the form data contains the value for State as **CA**, then you can replace the text with **California**.

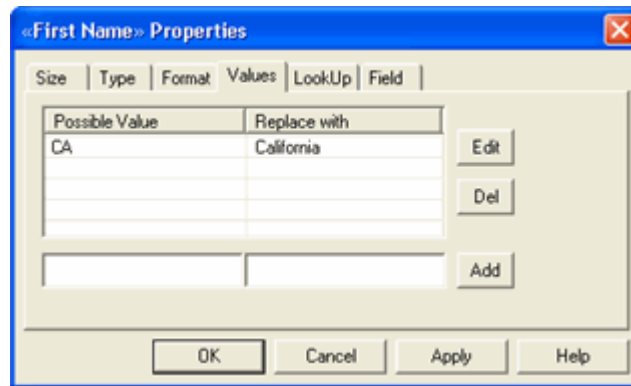


Figure 72: Properties – Values

In the text boxes that appear before the Add button, enter the value that appears in the email form and the value to be replaced.

Click **Add** to include the values. You can add any number of data by repeating the steps. To edit the values, select the text and click **Edit**. To remove the values, select the text and click **Del**.

17.4.5. Lookup

You can search for a particular value for a field and save a related value to another field. For example, for the name field containing value William, you can add the value Sales to the field Department.

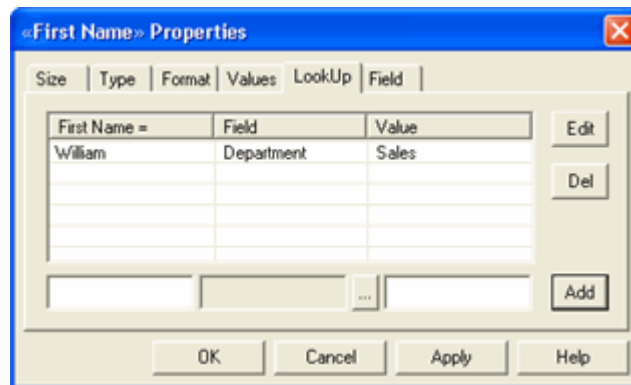



Figure 73: Properties – LookUp

Enter the value of the field to be looked up in the first box, click  to select the field for which the value is to be added and enter the value to be added in the last box.

Click **Add** to include the data entered. To edit the values, select the text and click **Edit**. To remove the values, select the text and click **Del**.

17.4.6. Field

In the **Field** tab, you can save the values from a form tag into an additional field.

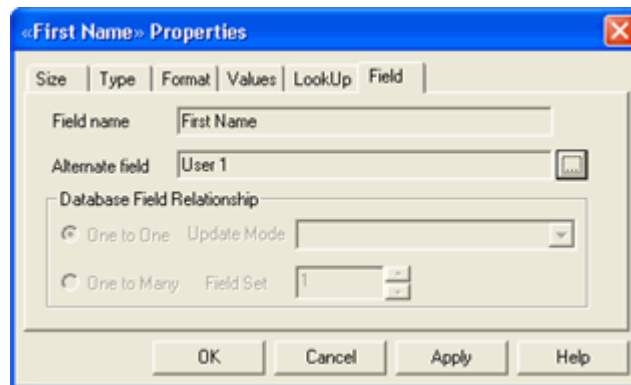



Figure 74: Properties – Field

The Field Name column automatically displays the selected database field name. In the **Alternate field** column, click  to select the additional field where the value is to be transferred.

17.5. Mark Form Identifier

You can mark a specific text to identify an email form. The template searches for the marked text in the email form and the email message is processed only if the text is found. This ensures that only the appropriate messages are processed by the template.

To setup a form identifier, select the text available in your email form and click **Tools > Mark Form Identifier**.

To mark the form identifier for a database field, refer to the settings for [Type](#) tab under the section **Setup Field Properties**.

17.6. Protect Template

You can protect your template being edited by other users by assigning a password.

Click **Tools > Set/Change Password**.

- ◆ In the **Add Password** dialog box, enter the password in **New Password**.
- ◆ Re-enter the password in **Verify Password** for confirmation and click **OK**.

Save the changes to the template and close the template.

Now if you try to open the template, you are prompted to enter the password.

To change the password, click **Tools > Set/Change Password**.

- ◆ In the **Change Password** dialog box, enter the password in **New Password**.

Re-enter the password in **Verify Password** for confirmation and click **OK**.



Password is case sensitive. Ensure that you provide the exact password text.

18. Setup Filter

You can setup a filter that can check the email form for certain criteria. The messages that satisfy the specified criteria alone are processed and transferred to destination. You can also send an automatic response to every message that is processed by a filter.

18.1. Create Filter

To create a filter,

Click the **Filter** icon in the toolbar

[OR]

Click **Tools > Filters**

In the Filter Setup dialog box that appears, click **New** to create a new filter.

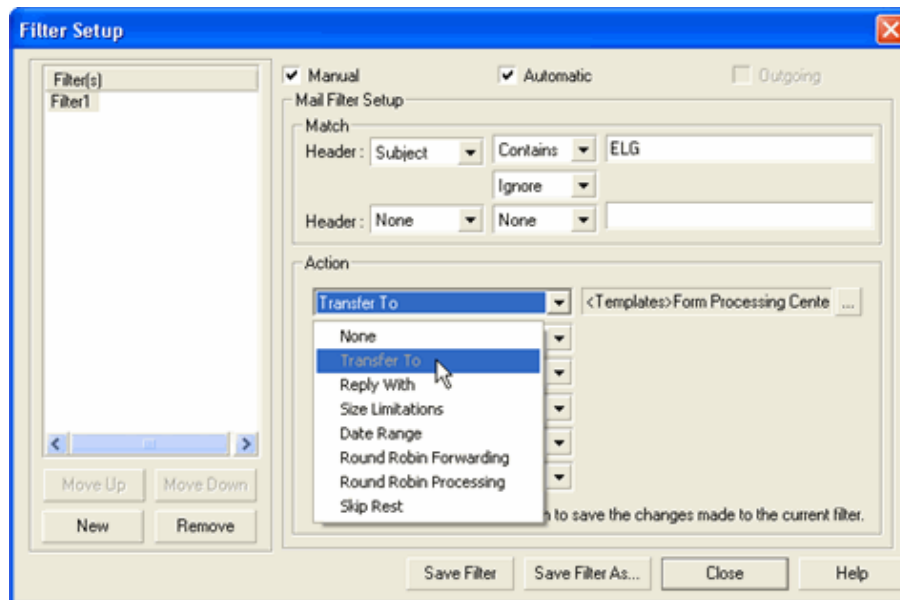


Figure 75: Setup Filter

Enter a name for the Filter.


Select the **Manual** checkbox to process the messages manually.

Select the **Automatic** checkbox to process the incoming messages automatically.

18.2. Setup Criteria

Under **Match Filter Setup**, specify the filter criteria.

Select the relevant column to be checked in the email message from the **Header** drop-down list. The available options are: From, To, Subject, Content, Account.

Select the matching condition from the next drop-down list. The available conditions are: Contains, Does not Contain, Is, Is not, Starts with, Ends with, Is in List. If you select the option Is in List, you need to create a text document that contains list of words to be searched in the email message. After selecting the option, click  next to the box and select the text file that contains the list of words.

Enter the text to be matched in the next box.


In the example shown in [Figure 75](#), the messages with the subject line that contains the text “ELG” are processed through the filter.

18.3. Setup Actions

Once the messages satisfy the specified condition, you need to specify the action to be performed. You can transfer the messages that satisfy specific condition to specified templates.

Under **Action**, click the down arrow to select the action to be performed. The following options are available in the drop-down list.

Transfer To

Select this option to transfer the message to selected templates. Click  to open the **Choose template for filter** dialog box.

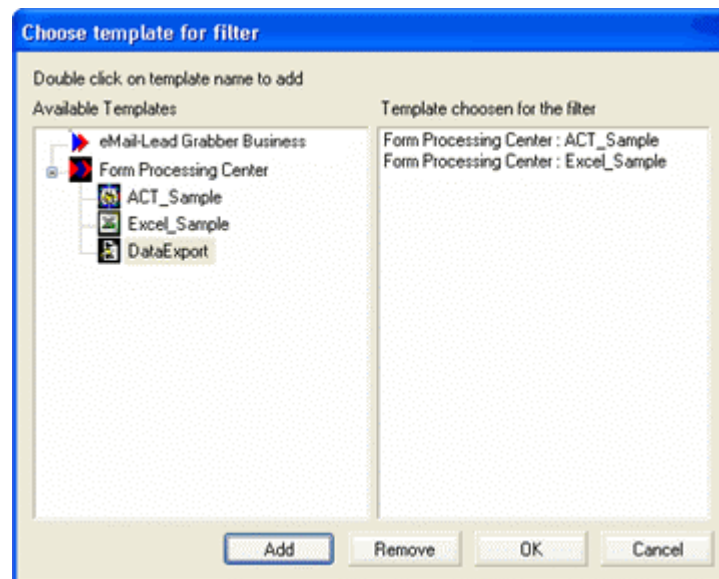


Figure 76: Select templates

In the dialog box, the templates are displayed under Available Templates.

Select the relevant template and click **Add**.

Now the template is displayed under **Template chosen for the filter**.

To remove a template select the chosen template and click **Remove**.

Click **OK** to save the settings.

Reply with

Select this option to send an automatic response to the processed email message. You need to create Stationery for sending the auto response. Select the Stationery file from the drop-down list. Whenever a message is processed by the filter, a response is sent to the sender of the message as per the settings you have made in the Stationery file. Refer to [18.4 Create Stationery](#) section for more details.

Size Limitations

You can setup to limit the size of the email message to be processed. You need to specify the maximum size limit. For example, if you specify the size as 1000 KB, then messages exceeding the size 1000 KB are not processed by the filter.

Date Range

You can use the **Date Range** option so that messages that contain dates within the specified range alone are processed. Enter the **From** and **To** dates to specify the date range.

Round Robin Forwarding


You can use this option to distribute the email messages to your team members in a repetitive cycle.

This enables you to distribute work among your team members effectively.

For example, assume that the marketing team consists of three members with email IDs as follows:

- ♦ william@egrabber.com
- ♦ richard@egrabber.com
- ♦ mark@egrabber.com

Now Round Robin Forwarding can be setup so that William received the first email, Richard receives the second, Mark – the third and William again receives the fourth email. This cycle is repeated.

In the Filter Action, select **Round Robin Forwarding** from the list. In the next box, click  to open the **Round Robin Forward** dialog box.

Click **New** to create a new set of email ID list. Enter the email IDs one below the other and click **Save**. Enter a name for the group of email IDs and click **OK**. Now the dialog box appears as shown in [Figure 77](#).

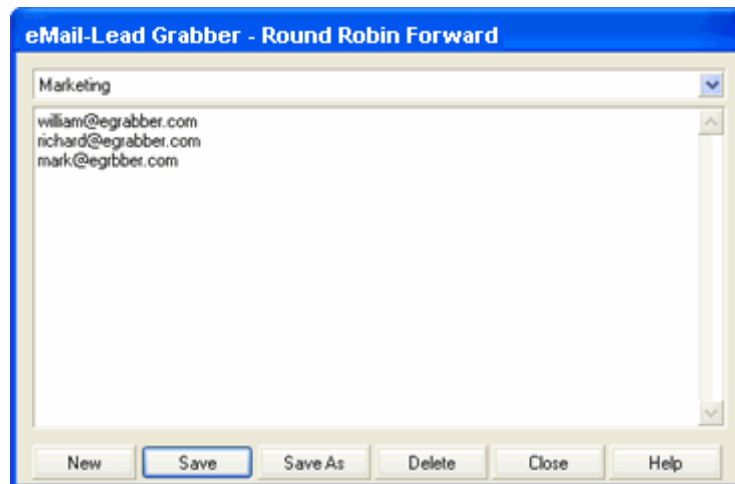


Figure 77: Round Robin Forwarding

- ♦ Click **New** to create another group.
- ♦ Click **Save As** to save the group with a different name.
- ♦ Click **Delete** to remove the group.
- ♦ Click **Close**.

Now the created groups are available in the drop-down list next to the Round Robin Forwarding Action.

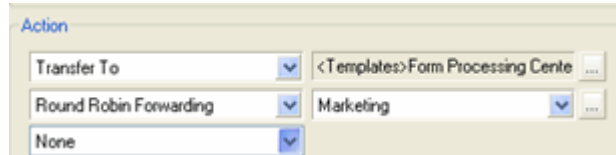


Figure 78: Round Robin Forwarding selected in Filter Action

Select the required group and save the filter.

Now whenever a message is processed by the filter, it is also sent to the marketing team member for follow-up.

Round Robin Processing

You can use this option to transfer the email messages to various templates in a repetitive cycle.

Round Robin Processing enables you to process the messages through a set of selected templates in a cycle. The messages that satisfy the Filter Criteria can be processed through different templates.

In this method, you can process the first message through first template, second message through the second template and so on. If you have specified three templates, then the fourth message is processed through the first template and this cycle is repeated.

When you are distributing email messages to the team members, they can maintain different database for saving the contacts. You can create different templates and map them to respective database maintained by your team members and use Round Robin Processing to save the contact details in corresponding database.

This enables your team members to follow up with the contact in their database effectively.

In the **Filter Setup**, select **Round Robin Processing** from the **Action** list.

Select the Template Group from the available list. To create a new group, click next to the option.

In the **Round Robin Process** window that appears, setup the following options:

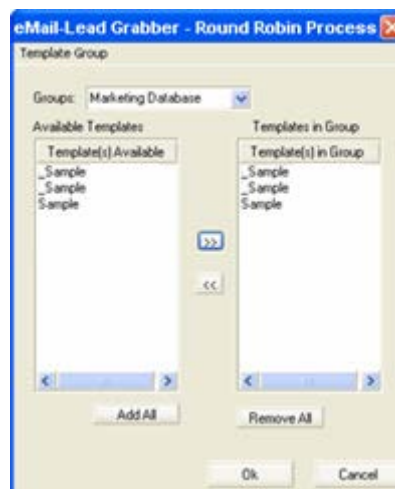




Figure 79: Round Robin Processing

- ◆ Select the name of the group from **Groups** list.
- ◆ To create a new group, click **New** on the **Template Group** menu.
- ◆ Enter a name for the group.
- ◆ Under **Available Templates**, Select the Templates to be added to the group and click .
- ◆ The added Templates are displayed under **Templates in Group**. To remove a Template from this list, select the Template and click .
- ◆ To add all the Templates to the group, click **Add All**.
- ◆ To remove all the Templates from the group, click **Remove All**.
- ◆ To save the group, click **Save** or **Save As** on the **Template Group** menu.
- ◆ To delete a group, select the group name from the list and click **Delete** on the **Template Group** menu.

Click **Close** on the **Template Group** menu.

Now the created groups are available in the drop-down list next to the **Round Robin Processing** Action.

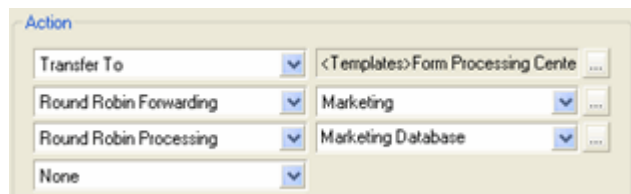


Figure 80: Round Robin Processing selected in Filter Action

Select the required group and save the filter.

Now whenever a message is processed by the filter, the contact details are saved in corresponding database for effective follow-up.

Skip Rest

When you have setup multiple filters, an email message is processed through all the filters one by one. If you want to stop processing a message that satisfies a condition through all the filters, you can select this option.

For example, assume that you have the following filters.

- ◆ Filter1
- ◆ Filter2
- ◆ Filter3

In Filter1, if the subject of an incoming email contains the text **eMail-Lead Grabber** then the email to transferred the specified template.

If you want to stop the message being processed through Filter2 and Filter3, then select the option **Skip Rest**.

If a message satisfies the specified condition, then it is not processed by rest of the filters. If the message does not satisfy the condition, then it is processed by the other filters.

When you use multiple filters, the **Skip Rest** action enables fast processing of email by the relevant filter and avoids unnecessary processing of email by the other filters.

Repeat the above steps to create more number of filters.

18.4. Create Stationery

When you receive an email form from a prospect, you need to send a response to the message. Instead of sending these reply messages for each and every email form, you can create a Stationery with customized message and link the Stationery with the Reply To action in Filter Setup.

Whenever an email message is processed through the filter, the Reply To option sends an automatic response to the message by using the selected Stationery.

Click **Tools> Stationery**.

In the **Stationery** dialog box, click **Add** to create new Stationery.

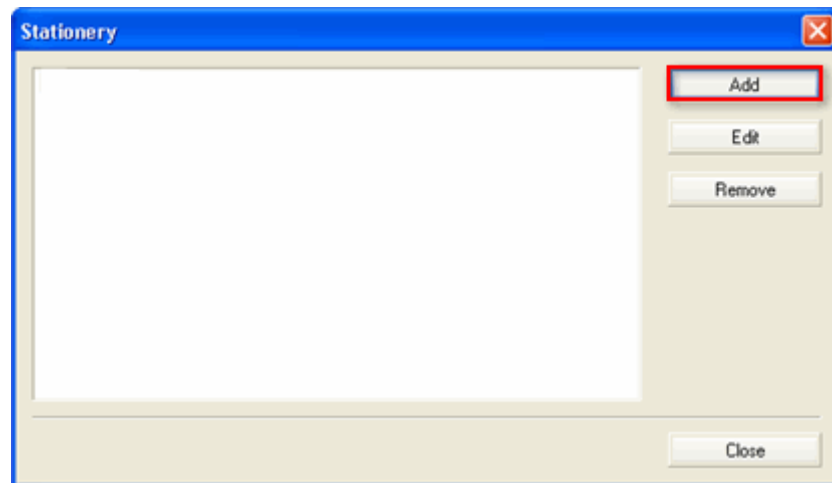


Figure 81: Create Stationery

A new message window appears as shown in [Figure 82](#).

The **From** column automatically displays the email ID you have provided in the Account Setup. If you have created more than one account, then you can select the account from the drop-down list. The response message is sent using the selected account.

In the **TO:** column, enter the email ID of the recipient. If you are attaching the Stationery to a filter, then the TO: address is automatically detected.

Enter a **Subject** line.

The checkbox **Include Incoming email while responding** is selected by default. This option includes the text of the original message while sending the auto response. You can clear this checkbox if you do not want to include the original message.

Use Incoming subject while responding: Select this checkbox to include the subject line of the incoming email in the auto response. The **Subject** line is disabled when you select this option.

Type your message text and save the Stationery. Click **Save** or **Save As** and enter a file name to save the Stationery. The Stationery files are saved with the extension .sta

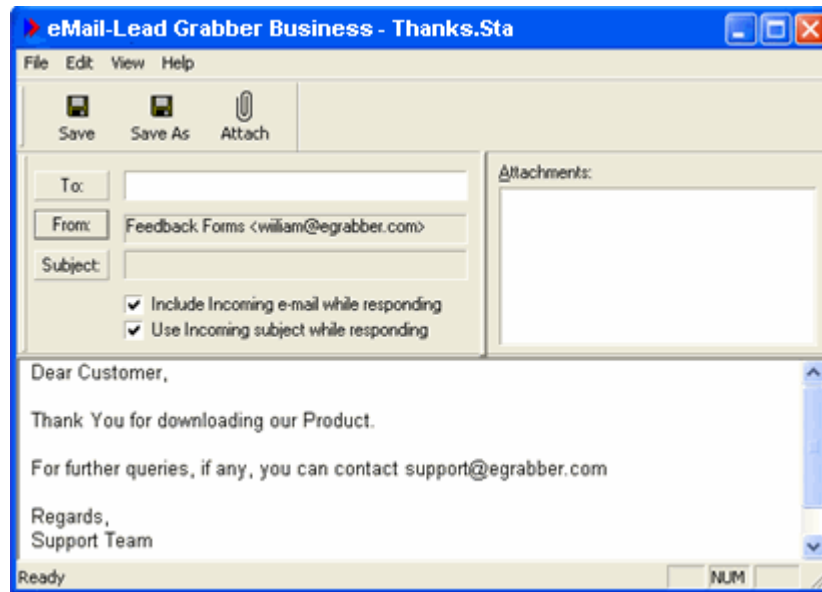


Figure 82: Sample Message to be sent as Auto Response

Click **Attach** to browse and select a document that can be attached to the sent messages. For example, you send your company's brochure as attachment along with all the responses.

If you want to send an email message to an individual immediately, enter all the details and click **File > Send**.

Once you save the Stationery file, the filename appears in the **Stationery** dialog box.

To modify the details of a Stationery, select the appropriate filename and click **Edit**. To delete a Stationery, select the filename and click **Remove**.

After creating required Stationery files, you can attach them to the **Reply With** action in appropriate filters. Whenever a message is processed by the corresponding filter, an auto response is sent to the sender of the email message by using the selected Stationery.

Refer to the [Filters–Reply With](#) section for attaching the Stationery file to a filter and send automatic responses to all the processed messages.

18.5. Working with filters

To process a message through filters, select the message in the eMail-Lead Grabber Inbox. To process all the messages, select all the messages by pressing **CTRL + A**.

Now right-click in the message grid and select the option **Process through Filters**. The messages are processed through all the filters you have created.

If you have selected the **Automatic** checkbox while creating a filter, then whenever a new message is downloaded into eMail-Lead Grabber Inbox, the message is automatically processed by the filter.

19. Maintenance of eMail-Lead Grabber

As you receive more number of messages, your mailbox may occupy more space in the hard disk and it becomes difficult to manage large number of messages.

You can use Dr. Mailbox utility to backup the old messages and to compact the mailbox. Dr Mailbox is a wizard based utility to compact, backup, repair, clean / backup and migrate Mailboxes.

This enables you to clear the hard disk space and to manage the messages in eMail-Lead Grabber Inbox efficiently.

Click **Tools > Backup / Compact** to open the Dr. Mailbox utility.

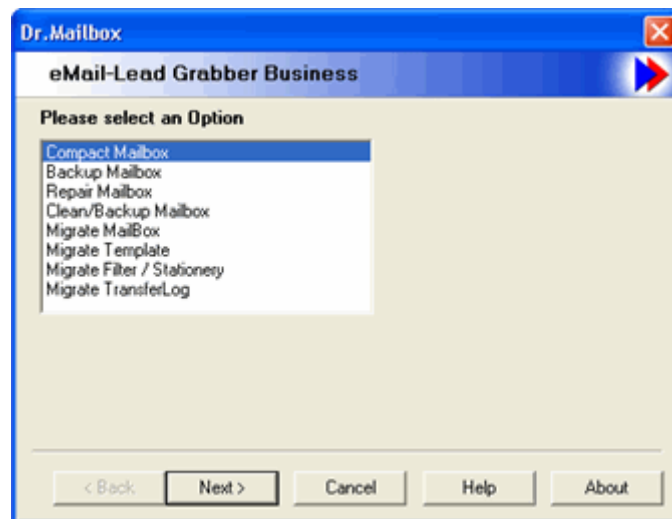


Figure 83: Dr. Mailbox to maintain the Mailbox

In the dialog box, select one of the following options and click **Next**:

Compact Mailbox: To compact the mailboxes that exceed the size limit. The mailboxes that exceed 45 MB size appear in red color in the next dialog box and require compaction. These mailboxes are selected by default for compaction.

Backup Mailbox: To have a backup copy of the mailboxes.

Repair Mailbox: To find and fix the errors.

Clean/Backup Mailbox: To clear the messages in the selected mailbox and copy a backup of the mailbox.

In the next dialog box, the mailboxes available in eMail-Lead Grabber are displayed. Select the mailboxes to be processed by selecting the check box that appears prior to the Mailbox.

Click the appropriate option.

Since eMail-Lead Grabber needs to be closed during the compaction/backup process, a message appears prompting you to close eMail-Lead Grabber.

Click **Abort** to stop the compaction process.

Click **Finish**.

Once the compaction / backup is completed, eMail-Lead Grabber is launched automatically.

Migrate Mailbox

You can use this option to import mailbox (with *.ebx extension) into eMail-Lead Grabber from a different email application.

Select **Migrate MailBox** and click **Next**.

Click **Browse** and select the mailbox to be imported into eMail-Lead Grabber.

Since eMail-Lead Grabber needs to be closed during the migration process, a message appears prompting you to close eMail-Lead Grabber.

Click **Finish**.

Migrate Template

You can use this option to import templates (with *.etf extension) created in previous versions of eMail-Lead Grabber into the current version.

Select **Migrate Template** and click **Next**.

Click **Browse** and select the template to be imported into eMail-Lead Grabber.

Since eMail-Lead Grabber needs to be closed during the migration process, a message appears prompting you to close eMail-Lead Grabber.

Click **Finish**.

Whenever your mailbox is overloaded with a large number of messages, launch the Dr. Mailbox utility to compact, backup and make more space in your hard disk. This improves the efficiency of eMail-Lead Grabber.

20. Automatic Processing of email

Now that you have setup to download the messages, setup the filter and created a template for your destination, just launch eMail-Lead Grabber and minimize the application.

If you have setup to download and filter the messages automatically, then you need not intervene with the application.

eMail-Lead Grabber automatically downloads the email messages whenever you receive an email form from your website, filters them and transfers the contact and additional details to your destination application.

If you have attached Stationery to the filter, then an automatic response is sent to the processed messages.

This enables you maintain all the leads generated from your web form and to follow-up with the leads.

21. Ready Reckoner

The following list provides the shortcut keys for your ready reference.

eMail-Lead Grabber	
To do...	Press
Filter	CTRL+T
Check Mail	CTRL+M
Compose Mail	CTRL+N
Reply To	CTRL+R
Reply All	CTRL+Y
Forward	CTRL+W
Delete Mail	CTRL+D
Quick Setup Wizard	CTRL+Q
Print	CTRL+P
Help	F1

Template Maker	
To do...	Press
Create New Template	CTRL+N
Open Template	CTRL+O
Save Template	CTRL+S
Insert Anchor	CTRL+M
Insert Field	CTRL+I
Set/Change Password	CTRL+W
Field Properties	CTRL+P
Anchor Properties	ALT+A
Template Properties	ALT+ENTER
Refresh Database	CTRL+R
Mark Form Identifier	CTRL+K
Duplicate Check	F7
Set Process	F8
Set Activity	F10
Send Template	ALT+N
Find	CTRL+F
Test Template	CTRL+T
Delete Templates	CTRL+D
Email Header	CTRL+H
Help	F1

Figure 84: Ready Reckoner

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