

# Quick Start Guide

Takes only a few minutes to read...



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## Welcome to AddressGrabber Suite!

Thank you for choosing AddressGrabber Suite. To help you get started quickly we have included this starter's guide. It takes only a few minutes to read this guide and you can start using the product.

If you have purchased the software with the CD, you can find the following in the CD:

- AddressGrabber Suite Installation files.
- Quick Start guide – Opens with Adobe Reader.
- Sample addresses.
- Demo of the Product.
- Readme.txt.

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Now, let us get started.

## About AddressGrabber Suite

AddressGrabber Suite quickly captures contact information from documents, email, and web pages to your Address Book in just one click.

AddressGrabber Suite automatically captures contact information [Salutation, Name, Company, Title, Address, Phone, Fax, Email and Website] and transfers the information into ACT! 2010 / 2009 / 2008 / 2007 / 2006.

This software enables you to lookup for contacts in your address book and to add activities, notes, or history to the contact.

## System Requirements

- Pentium III PC or higher, 128 MB RAM or as required by the OS, 30 MB Free Space in Hard Disk to install and run the software.
- Operating System Supported:
  - Microsoft Windows Vista (32-bit) Enterprise Edition
  - Microsoft Windows XP (Service Pack 2.0)
- Works with...
  - ACT! 2010 / 2009 / 2008 / 2007 / 2006

## Installing the Software

- If you are installing from a CD, double click the setup file in the AddressGrabber Suite folder.
- If you have downloaded the product, run the program from the folder where you have stored the installation files. You can download from <http://www.actaddons.com/products/reg-pages/egb-suite-reg.asp>
- Installation wizard guides you through rest of the process.
- Click **Finish** to complete the wizard. You have now successfully installed the software.

## Registering the Software

After Installation, the **eGrabber Product Registration** dialog box appears on your screen.

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



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

- Type or paste the License Key under "**Please type or paste your License Key here**" and then click **Register Now**.
- The message "**Successfully Registered**" appears under Status. Now click **Continue** and start using the software.

[OR]

- Click **Continue** to evaluate the product for 3 days.



\*\*The trial version is fully functional, but limited to be used for 10 days or for 50 transfers whichever is earlier.

## Demo Version

After the trial period expires, the software continues to work in the demo version. In the demo version, only limited features are available and other features are disabled. You need to register the software with the purchased License Key to utilize the complete functionality of the software.

In the demo version, the following features continue to work in AddressGrabber Suite.

- **Lookup:** You can lookup a contact with the Company Name as the input.
- **Notepad:** The electronic notepad can be opened to enter temporary notes.
- **ACT! Time Zone:** Displays the current time of the selected contact in ACT! database. In the demo version, the time lookup works only if the contact in ACT! consists of a valid phone number.
- **Timer:** The timer is used to estimate the time spent with a contacts.
- **My Contact:** Designate most frequently used contact as My Contact.
- **Current Record:** Displays the currently opened record in ACT! database in the Lookup box.

The other features are disabled in the demo version. If you try to use other features, you get a message prompting that the feature is restricted.

You can purchase the software to get the complete functionality

## Using AddressGrabber Suite

AddressGrabber Suite is displayed as a floating toolbar that can be dragged to any part of the screen. The toolbar consists of Action Buttons that can be used to capture contact information and to add activities, notes, to lookup etc.

When minimized, the software is displayed as a Taskbar Icon. You can right click the Taskbar Icon to make use of the options available in the toolbar.

### AddressGrabber Suite Toolbar

Use AddressGrabber Suite toolbar to lookup contacts in the database and transfer contacts from documents, email, and web pages into the database.

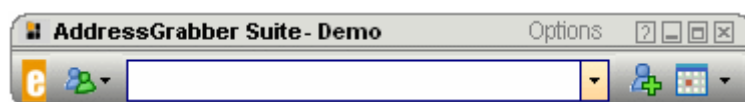


Figure 1: AddressGrabber Suite Toolbar

The AddressGrabber Suite Toolbar contains the following:

**Options:** Click here to view the AddressGrabber Suite Options that enable you to modify the settings and to change other options.

**Minimize:** Click here to minimize the Toolbar.

**Maximize/ Restore:** Click here to toggle the AddressGrabber Suite Toolbar between the Standard and Compact modes.

**Close:** Click here to display AddressGrabber Suite as a Taskbar Icon.

#### Smart Lookup:

You can search for a contact by entering a part of the name, company, or email. The Smart Lookup function searches the database for the contact and displays the closest match to the searched data in the Lookup box in the 'Contact Name – Company – Phone – Email' format.

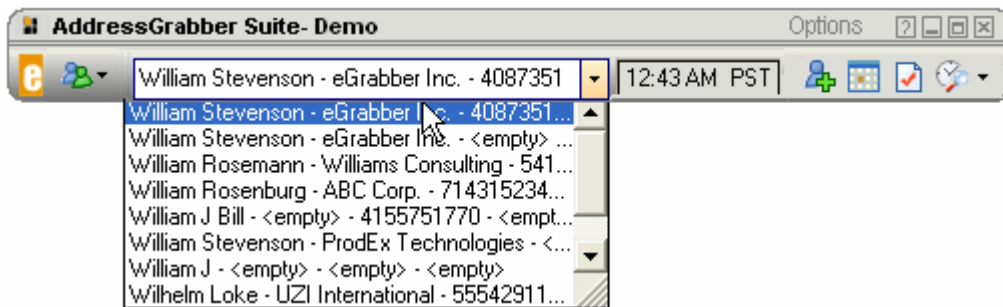


Figure 2: Lookup box displays found results

**Time Zone Display:**

The current time along with the time zone in the location of the selected contact is displayed next to the Lookup box. The time is calculated based on the Time Zone Settings.

**Action Buttons:**

The toolbar contains Action Buttons that enable you to perform various functions like add or update a contact, to lookup for a contact in your destination, to add Activities, Notes, History and more. You can also customize to add or remove these buttons.

You can also find a **Notepad** option to open a text file where you can save additional information.

**Standard Mode Options**

Click the **Maximize** button to view the toolbar in the Standard mode.

In the Standard Mode, the toolbar displays a **Smart Box** that enables you to type any text related to Activity, Notes or History and you can transfer this text to your destination. Data can be temporarily entered in the Smart Box and then transferred to the destination application later.

**Advanced Mode Options**

In the toolbar, click **Options > Toolbar Options > Advanced Toolbar** to view the toolbar in the advanced mode.

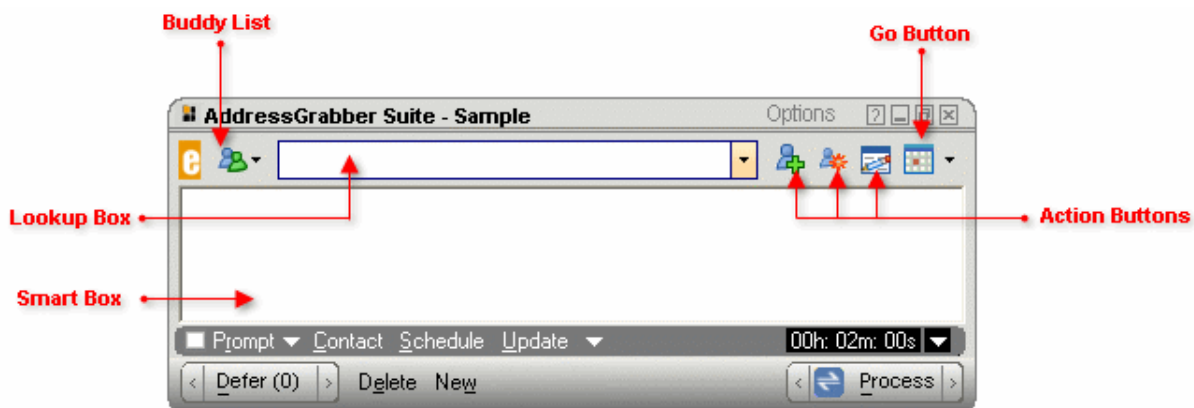


Figure 3: AddressGrabber Suite Toolbar – Advanced Mode

In the advanced mode, you can find options at the bottom of the toolbar to manipulate the data entered in the Smart Box.

These options include **Contact, Schedule, Prompt, Clear, Defer** and so on. The **Process** button enables you to transfer the entire data in the Smart Box to various fields. You can assign appropriate fields to the text and then click the Process button to transfer the data to corresponding fields.

## Transfer Addresses to ACT!

You can transfer contact information to ACT! 2010 / 2009 / 2008 / 2007 / 2006 from documents, emails, and web pages. The procedure explained in the following sections is common for ACT! 2010 / 2009 / 2008 / 2007 / 2006.

Click **Transfer Options** in the Action Button **Go** available in the toolbar.

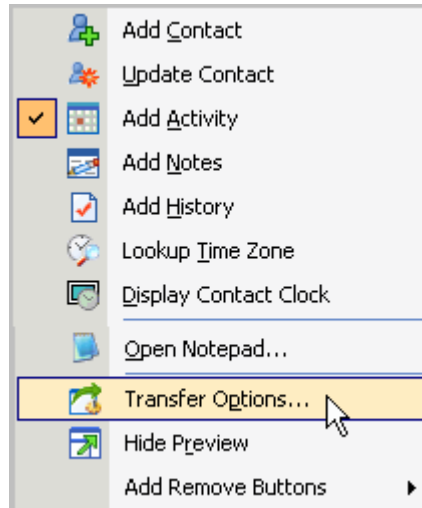


Figure 4: Transfer Options

In the **ACT! Link Options** window that appears, you can setup the following options before transferring the information.

### Database Login

In the **ACT! Link Options** window, click **Login** to transfer the captured information more accurately. Ensure that ACT! is already open in your system.

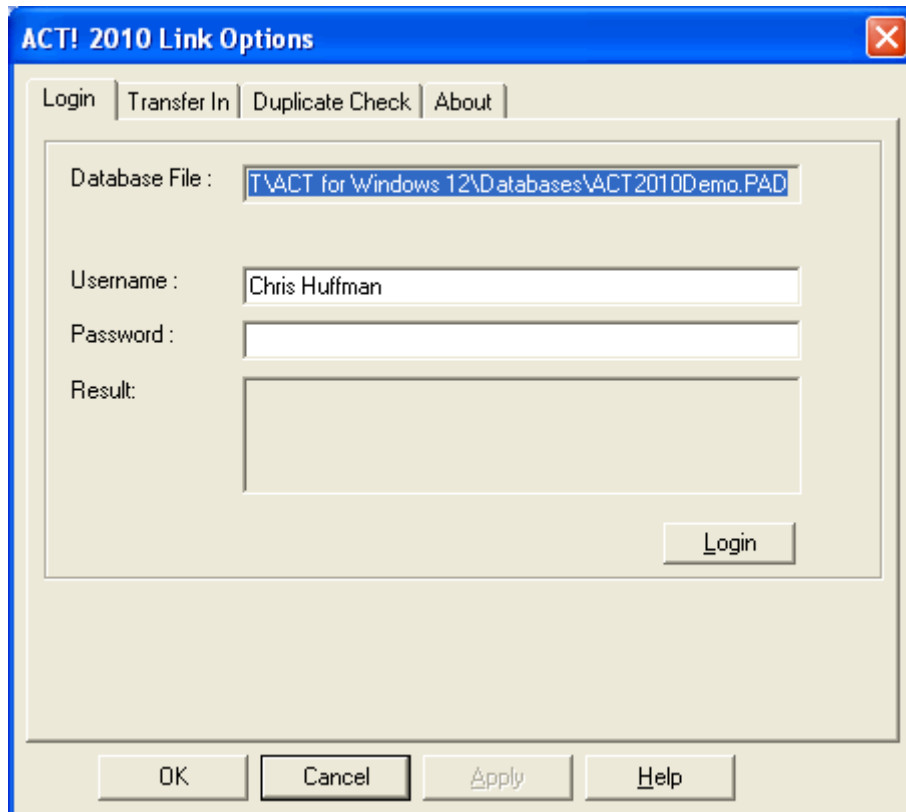


Figure 5: Database Login

In the **Login** tab, enter the following details.

- **Database File:** The database name and path of the opened ACT! database is automatically displayed
- **UserName:** Enter the login name of your ACT! .
- **Password:** Enter the password to access your database.
- Click **Login** to get access to database.

The message **Login Successful** appears in the Result area. If correct details are not provided, then the message **Login Failed** is displayed.

Click **Apply** to save the settings.

## Transfer Company

You can setup to transfer the contact information either to the Business or Home section of ACT!. Click the **Transfer Company** tab in **ACT! Link Options** dialog box.

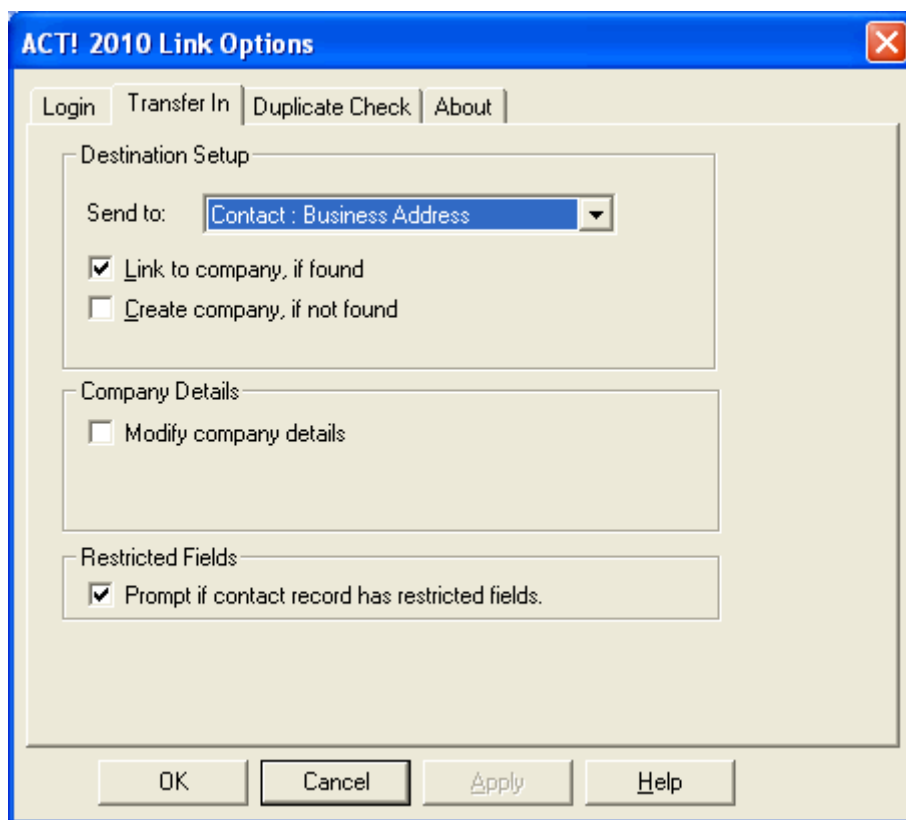


Figure 6: Transfer Company details

- In the **Send To:** list, select the relevant option to transfer your contact information.
  - **Contact: Business Address:** This option is selected by default. The information is added as the primary address in ACT!
  - **Contact: Home Address:** Select this option to transfer the information to the Home Address tab of ACT!
  - **Contact: Business and Home Address:** Select this option to transfer the information to the primary address as well as to the Home Address tab of ACT!.
- **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.

- **Modify Company Details:** Select this option to update the existing company record in ACT! with the new record being transferred.



The following option is available for ACT! 2010 / 2009 / 2008 / 2007 only.

- Select **Prompt if contact record has restricted fields** to get a warning message if ACT! 2010 / 2009 / 2008 / 2007 database contains any user-restricted fields.
  - In the warning message that appears, click **Yes** to transfer the record. The information is transferred to all the fields except the restricted fields. The restricted fields are left blank for the transferred record.
  - Click **No** to cancel the transfer of record.

Click **Apply** to save the settings

## Check for Duplicates

You can setup the duplicate check to avoid transferring duplicate contact information to ACT!. AddressGrabber Suite provides various options to handle the duplicate records.

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

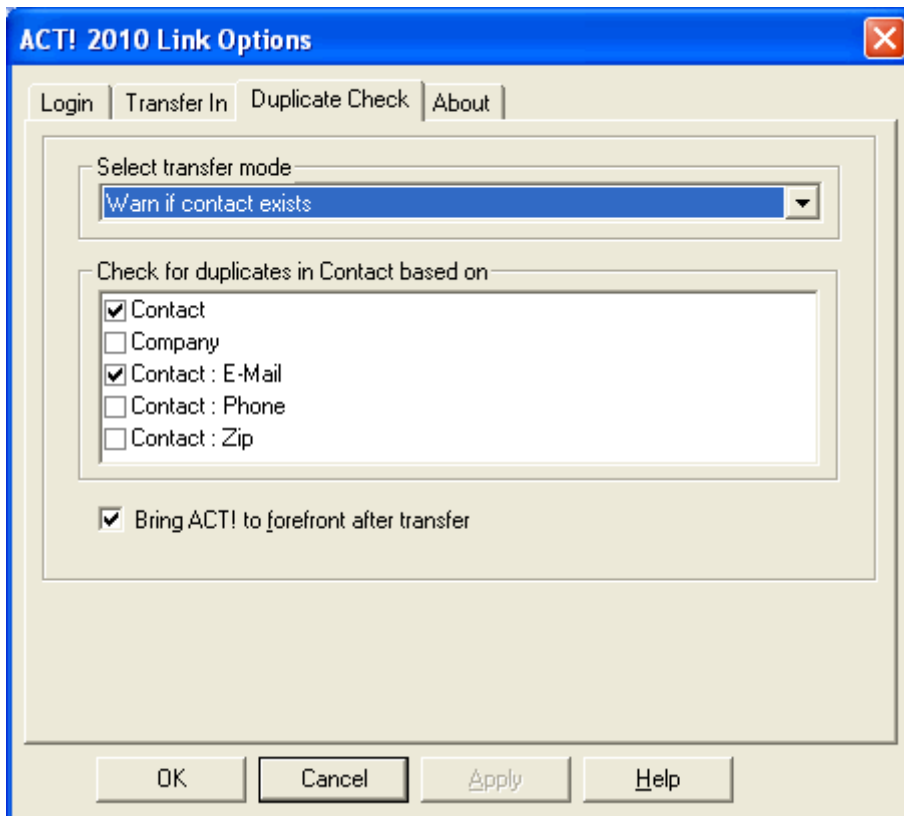


Figure 7: Setup Duplicate Check


- Under **Select transfer mode**, select the required method to transfer duplicate contacts. Example: Select the method “Warn if contact exists”. A warning message appears when a duplicate contact is transferred. You can either update or skip the duplicate contact
- Under **Check for duplicates in Contact based on**, select the fields for which the values to be checked for duplicates. The values of the fields selected here are checked during the transfer process.
- **Bring ACT! to forefront after transfer:** Select this option to view the contact record created by AddressGrabber Suite after the transfer process.
- Click **Apply** to save your settings.

## Transfer a contact to ACT!

Select your contact information from your source.



Figure 8: Selected Contact Information

Now click the  Add Contact Button in the toolbar. The **AddressGrabber Suite – Confirmation window** appears displaying the extracted contact details.

Salutation	First Name	Last Name	
	William	Stevenson	
<b>Contact Info</b>   Format			
Company	eGrabber Inc.	Phone	Extr:
Job Title	Sales Manager	Phone1	Extr:
Dept		Fax	
Address	14471 Big Basin Way	Mobile	
	Suite E	Pager	
City	Saratoga	Email	sales@egrabber.com
State	CA	Email1	william@egrabber.com
Zip	95070	Country	USA
		Web	www.egrabber.com
Verify Address			
<input checked="" type="checkbox"/> Use Format Options <input checked="" type="checkbox"/> Display parse result window			
<b>Captured Text:</b>			
William Stevenson Sales Manager eGrabber Inc. 14471 Big Basin Way, Suite E Saratoga, CA 95070 sales@egrabber.com william@egrabber.com			
Transfer   Cancel   Parse Again   Help			

Figure 9: Address Confirmation Window

You can verify and edit the details in this window. You can also verify the address with the USPS website to get the official postal address. You can also format the contact information in this window. Now click **Transfer** to save the contact information in ACT!.

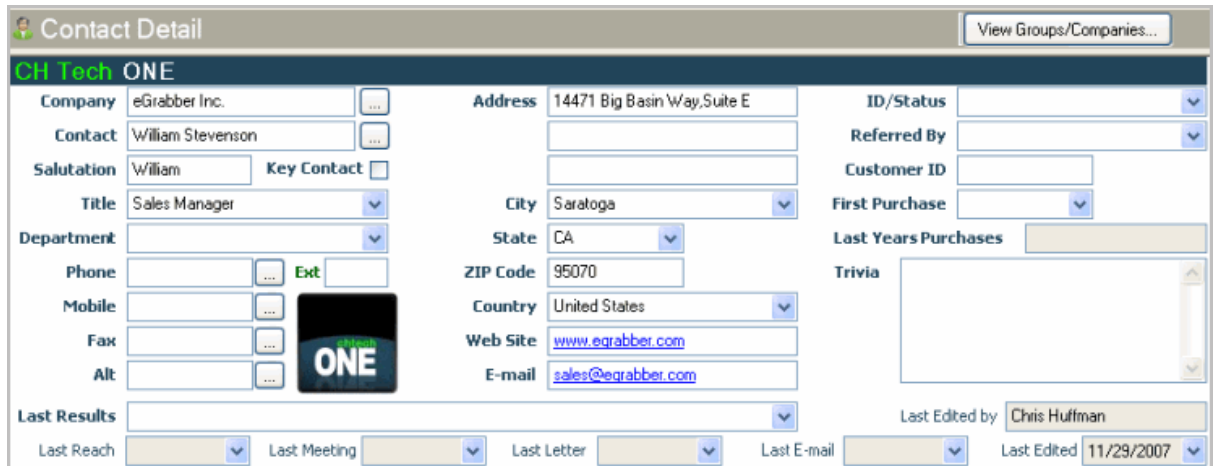


Figure 10: Contact transferred into ACT!

## Schedule Activities

You can add Activity, History, or Notes to a selected contact by using the **Smart Box** in the toolbar.

Lookup the Contact to which the activity is to be scheduled. Enter the activity to be scheduled in the **Smart Box** and click **Add Activity** in the toolbar.

The activity is transferred to the selected contact in ACT!

## Process multiple data

Enter different activities in the **Smart Box**. Now right-click on each item to assign a field to the selected text as shown in Figure 11.

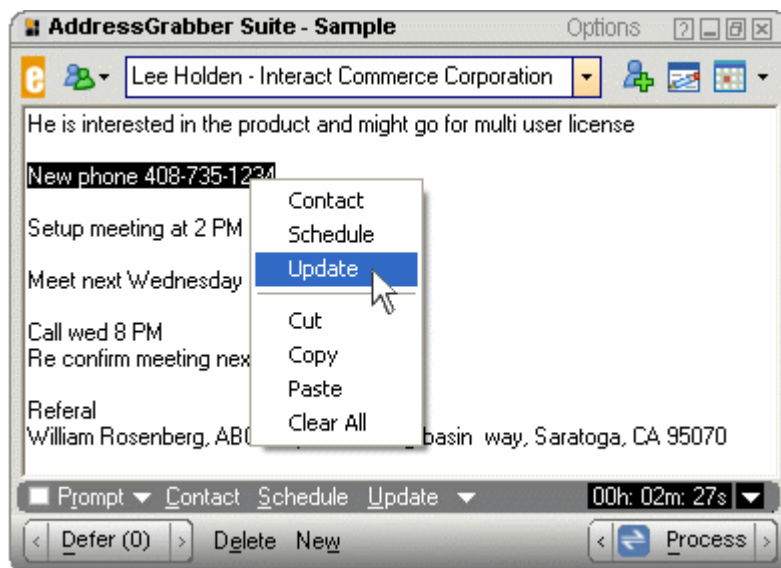


Figure 11: Assign fields to text

After assigning fields to corresponding text, the Smart Box appears as shown in Figure 12.



Figure 12: Data with assigned fields

Now click the **Process** button to transfer the data to corresponding fields in ACT! .

With AddressGrabber Suite, you can also:

- Lookup a contact easily.
- Update existing contact with new details.
- Add frequently interacted contacts to buddy list.
- Add Notes and History to selected contacts.
- Find a contact and add Activity.
- Customize settings to change the format of contact information.
- Set timer to estimate the time spent with a particular contact.
- Setup time to be scheduled for an activity.
- Setup alarm time.
- Display the current time for the looked up contact.
- Lookup the time zone of selected contact.

In addition, lots more.



Refer to the help topics and user manual for more details about AddressGrabber Suite.

## Technical Support

**Telephone:** (408) 872-3103 Weekdays 8 AM - 5 PM PST

**Fax:** (408) 861-9601

**E-mail:** [support@egrabber.com](mailto:support@egrabber.com)

**Website:** <http://www.actaddons.com/products/2005/egrabber-suite.asp>

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