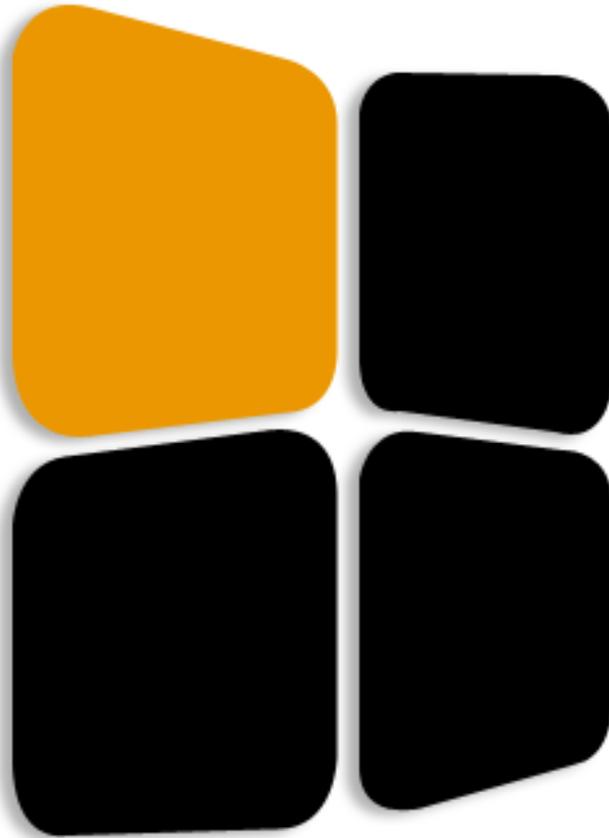


AddressGrabber Suite



User Guide

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Preface

This guide provides step-by-step instructions on how to use AddressGrabber Suite effectively to manage your contacts. To start with, you can work with the sample addresses provided with the Software. Follow the conventions for better understanding of the product.

Conventions

The following conventions are used in this guide:

Convention	Description
Figures	Illustrations that represent screenshots in AddressGrabber Suite.
Cross-reference	Cross-references are provided as hyperlinks.
	Note: Important or supplemental information.
	Tip: Suggestion that is supportive.
Example	Instances that help to understand a feature.
	Warning: A caution message.

1. About AddressGrabber Suite

AddressGrabber Suite automatically captures contact information [Salutation, Name, Company, Title, Address, Phone, Fax, Email and Website] and transfers the information into ACT!

AddressGrabber Suite also helps you to lookup for contacts in your address book and to add activities, notes, or history to selected contacts.

The features of AddressGrabber Suite are:

- **Speeds up data-entry:** Eliminates manual typing and automates data entry that saves your valuable time.
- **Eliminates data-entry hassle:** Eliminates the need to move from one field to another to fill in the details. With AddressGrabber Suite, the entire data can be placed in the Smart Pad and transferred to appropriate fields.
- **Eliminates errors:** Manual Entry may lead to type errors and data being entered into wrong field. AddressGrabber Suite eliminates manual data entry.
- **Speeds up contact lookup:** Provides a Smart Lookup box that enables you to search for a contact just by typing part of Contact name, company, or email.
- **Process multiple data:** Enables to enter multiple details and transfer the data into corresponding fields with a single click.
- **Update & Backup Information:** When you update details in the Contact Manager, AddressGrabber Suite automatically updates the current contact with the new information and saves the old information in notes/history tab as Backup.
- **Automatic Conversion to local time:** When scheduling an activity, automatically converts a different time zone to local time. For **Example**, if your client wants to call at Eastern Time, and you are in Pacific Time, your local time at Pacific Time is saved in the activity schedule.
- **Automatic Address Verification:** When entering contacts, automatically verifies the postal address by referring to the USPS website.
- **Keeps track of time spent:** Automatically keeps track of how much time is being spent on each contact – to ensure that all time is billed.
- **Electronic Notepad:** AddressGrabber Suite helps you manage your voice mails and commitments. Handles temporary commitments that are to be taken care, but are not big enough to be entered in a Contact Manager.
- **ACT! Time Zone:** Displays the current time along with time zone corresponding to the location of the selected contact.

2. Using AddressGrabber Suite

AddressGrabber Suite is displayed as a floating toolbar that can be moved to any part of the screen. The toolbar contains Action Buttons that can be easily added or removed.

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

You can maximize AddressGrabber Suite to view in the Standard Mode. Data can be temporarily entered in the text box or the Smart Box and then can be transferred to the destination application later. You can also add activities, notes, and history to selected contacts by entering text in the Smart Box that is available in the standard mode toolbar.

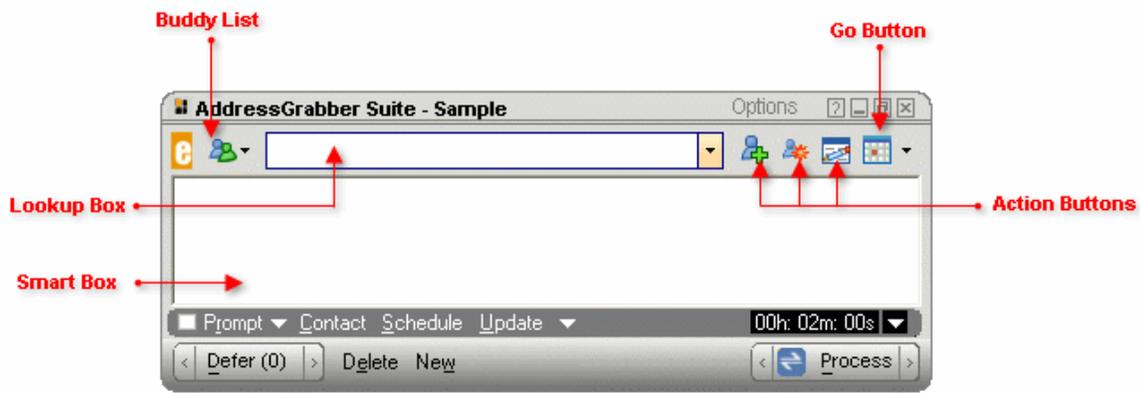


Figure 1: AddressGrabber Suite Toolbar

The title bar displays the following:

- ◆ **Options:** Click here to view the AddressGrabber Suite Options that enable you to modify the settings and various options. Refer to [Chapter 2.1](#) for more details.
- ◆ **Minimize:** Click here to display AddressGrabber Suite as a Tray Icon.
- ◆ **Maximize/Restore:** Click here to toggle the AddressGrabber Suite Toolbar between the Standard and Compact modes.
- ◆ **Close:** Click here to close the Toolbar.

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 number - Email' format.

Click the **Lookup** box to view the previous searches. Click a contact displayed in this box and use the **Action Buttons** to schedule activities with the corresponding contact in your database.

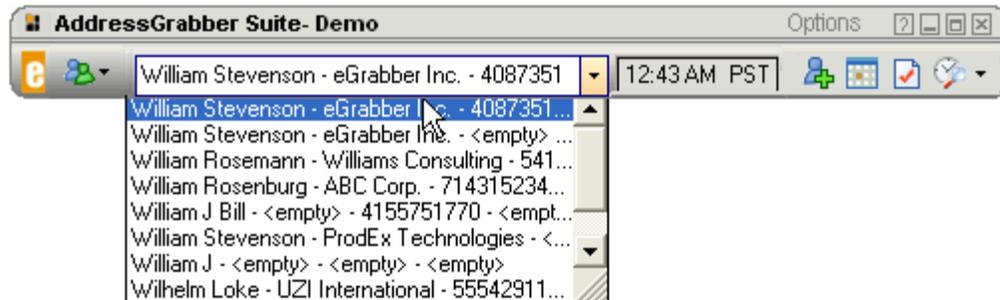


Figure 2: Lookup Box displaying the Search Results

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 execute 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.

The Action buttons are discussed in detail in [Chapter 2.2](#)

Standard Mode Options

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.

When you navigate through contacts in ACT!, the corresponding contact is automatically displayed in the **Lookup** box. Click the title bar to synchronize the contacts.

If any text is available in the Smart Box, then the 'synchronize' option is disabled. However, if you restore the toolbar to the compact mode, then the 'synchronize' option is enabled and displays the contact in **Lookup** Box.

 You can disable the 'synchronize' option in the [Miscellaneous](#) Settings.

Advanced Mode Options:

In the advanced mode, the **Process** button is available that 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.

You can also make use of **Contact**, **Schedule**, **Prompt**, **Defer** and other options to manipulate the data entered in the Smart Box. Refer to [Chapter 2.4](#) for more details about Advanced Mode Options.

2.1. AddressGrabber Suite Options

Click **Options** in the AddressGrabber Suite Toolbar to modify the settings and change other options. The following table describes the available options:

Options	Function
Settings	Opens the Settings dialog box where you can customize the default options in AddressGrabber Suite .
Reindex	You can re-index the ACT! database by using this option.
Show History	Displays information about the processed and deferred data. You can view the following details: <ul style="list-style-type: none"> ➤ Processed Data: Details of data transferred into ACT! by using the Process button. ➤ Deferred Data: Details of deferred data saved in a RTF file.
Toolbar Options	Displays different options to display the Toolbar in various modes. The available options are: <p>Toolbar Always in Front: Select this option to display the Toolbar always in front of all the open windows.</p> <p>Show Advanced/Standard Toolbar: Toggles the Toolbar between Advanced / Standard Mode.</p> <p>Hide Toolbar: Minimizes the Toolbar to the Tray Icon.</p>
eGrabber on Web	Displays links to Web Pages about AddressGrabber Suite , other eGrabber Products, Purchase Information FAQs and "Tell a Friend".
About AddressGrabber Suite	Displays information about AddressGrabber Suite version number, copyright and contact information. <p>In the dialog box that appears, click the System tab to view your system configuration details</p> <p>Click the License tab to view your license information.</p>
Help	Opens the Help Topics.
Demo	Launches a Demo about AddressGrabber Suite.
Sample	Click here to access sample addresses. You can test the transfer of data to your destination with the sample addresses.
Support	You can send your feedback, suggestions, or any error

	<p>report. Select any one of the following options:</p> <p>Feedback: Click here to open a Feedback form. You can fill this form with feedback and suggestions and send the same to the AddressGrabber Suite Team.</p> <p>Report an Issue: Click here to report any error or problem you encountered when using AddressGrabber Suite.</p>
Register / Unregister AddressGrabber Suite	Opens eGrabber Product Registration dialog box to register or unregister the product.
Live Update	Live Update service is used to instantly update AddressGrabber Suite with the latest files and the service packs.
Exit AddressGrabber Suite	Quits AddressGrabber Suite.



The same options are available when you right click the Tray Icon. You can also find an additional option **Capture It!**. This option is available in the Action Button **Go** in the Toolbar. Refer to Action Buttons for more details.

2.2. Action Buttons

AddressGrabber Suite Toolbar contains Action Buttons that can carry out various functions.

The Action Buttons enables you to add or update a contact, schedule activities, add notes or history to contacts and so on.



Figure 3: Action Buttons

The toolbar contains the following buttons:



Buddy List:

You can add the most frequently interacted contacts in the buddy list. Instead of looking up for a contact, you can easily open a contact from the buddy list. You can also update and schedule activities to the selected contacts easily.

Click the **Buddy List** to make use of the following options:

Button	Function
 My Contact	<p>Assign the most frequently used Contact as My Contact. When you click this option for the first time, a dialog box appears where you can Lookup and select the My Contact.</p> <p>You can change or edit the My Contact by using Miscellaneous Settings.</p> <p>When you click this option, the contact is opened in the database and also displayed in the Lookup Box.</p>
 Current Record	<p>Click this option to transfer data to the currently opened record. Once you click this option, the currently opened record in ACT! is displayed in the Lookup Box.</p>
 Add to Favorite List	<p>You can add the frequently used contacts to the favorites list. The contacts added to this list are displayed in the Buddy list below the already available options.</p> <p>When you click a contact in the favorites list, the contact is opened in the database and also displayed in the Lookup Box.</p>



Only the Looked Up Contacts are added to Favorites List. You can add upto 20 records in the Favorites List.

After selecting the contact by using any one of the above options, you can update or schedule activities to the contact by using the following Action Buttons.



Go - Button:

The **Go** button can execute different functions. Click the arrow next to this button to perform the following functions.

Button	Function
 Add Contact	Transfers the Contact Information; from your email, documents, web pages or the data entered in the Smart Box as a new Contact to your database
 Update Contact	Updates the looked up Contact with selected text or text entered in the Smart Box . If no contact is looked up, the text is processed as per the options you have setup in the Destination Setup .
 Add Activity	Adds the selected text or the text entered in the Smart Box as activity to the looked up Contact in the database. If no contact is looked up, the activity is scheduled as per the options you have setup in the Destination Setup .
 Add Notes	Adds the selected text or the text entered in the Smart Box to the Notes tab of the looked up Contact in the database. If no contact is looked up, the activity is scheduled as per the options you have setup in the Destination Setup .
 Add History	Adds the selected text or the text entered in the Smart Box to the History tab of the looked up Contact in the database. If no contact is looked up, the activity is scheduled as per the options you have setup in the Destination Setup .
 Lookup Time Zone	Displays the current time of the selected contact, when the contact is available in a different time zone. See: Lookup Time Zone for more details.
 Display Contact Clock  Hide Contact Time Zone	Shows / Hides the Time Display next to the Lookup box. See: Contact Clock for more information.
 Open Notepad...	Opens a text file named Notes.Txt to save any additional information. Each time you open the file, the Current date and time is displayed on the top of the file with the previously entered information. The new information you enter is added to the top of the file.
 Transfer Options...	Opens the Link Options dialog box to customize the settings before transferring data to your database.
 Hide Preview  Show Preview	Hides / Shows the Address Confirmation Window before transferring the data to your database. You can verify and edit the extracted. Contact information in this window
 Add Remove Buttons ▶	Click this option to access a submenu. You can show or hide the Action Buttons in the Toolbar by selecting relevant options in this menu

 In the **Add/Remove Buttons** menu, the options toggle between **Show/Hide** the corresponding Buttons. Select accordingly to Show / Hide the Buttons. illustrates the available options in this submenu.

You can use the **Action Buttons** to lookup for a contact in your database and add additional information to the looked up contact quickly.

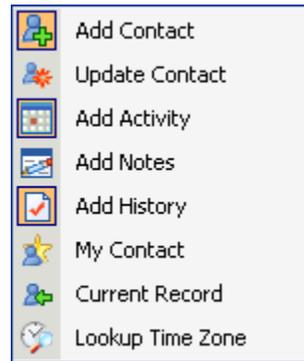


Figure 4: Add/Remove Buttons

To schedule activities or add notes to a contact in your database, you have to follow a procedure in the database. You have to fill in the appropriate fields like date, time, type of activity etc., to schedule an activity that may exploit most of your time.

By using the **Smart Box**, you can enter the activity in plain text, and AddressGrabber Suite automatically recognizes this text and transfers the data to corresponding fields including date and time in you database.

 Ensure that your database is open when you execute the functions using the Action Buttons.

2.3. Standard Mode Options

Click the **Maximize** button in the AddressGrabber Suite Toolbar to view the **Standard Mode Options**.

You can find a **Smart Box** where you can type your text like activity, history, or notes and then transfer the same to your database. After entering the text, click the relevant Action Buttons to transfer the data to corresponding Contact.

2.4. Advanced Mode Options

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

You can find the following options at the bottom of the toolbar. Use these options to manipulate the text entered in the Smart Box.

Prompt: Select this option to display the following prompts in the Smart box.

- ◆ **Contact:** <Enter Contact Name>
- ◆ **Schedule:** <Enter Activity>
- ◆ **Regarding:** <Enter Reference Text>
- ◆ **Alarm:** <Enter Alarm Time>
- ◆ **Notes:** <Enter Notes>

The data you enter next to the prompts are transferred to respective fields in your database. If a contact is already looked up in the application, then the name of the contact automatically appears next to the **Contact** Prompt. You can edit this contact name.

When the looked up contact and the contact entered in the prompt are different, the contact in the Prompt is given the priority.



If the Smart Box already contains any data when you click **Prompt**, a message box appears warning you that the data in Smart Box will be cleared. Click **OK** to continue with prompt or **Cancel** to retain the data in Smart Box.

Contact:

Click to assign the text in the Smart Box as a Referral Contact. When you click the **Process** button, the data in the Smart Box is processed as follows:

- The text in the Smart Box is added to the Notes section of the looked up contact.
- The text in the Smart Box is added as a new contact. The looked up contact name is added to the **Referred By** field of the newly created contact.

Schedule:

Click to schedule the text in the Smart Box as Activity.

- The text is added as activity to the looked up contact when you click the **Process** button.

Update:

Click to update a contact. As you click the down arrow in this button, you can view two more options:

- **Enable History:** Select to transfer the text in the Smart Box to the History tab.
- **Enable Notes:** Select to transfer the text in the Smart Box to the Notes section.

To update a Contact,

- Type the text to be updated in the Smart Box.
- Select the text and click **Update** option in the Standard Mode Toolbar.
- Click the **Process** button to update the looked up contact.

If you click **Update** without selecting the text, then the **AddressGrabber Suite - Update Contact** dialog box appears.

- This dialog box consists of all the address fields. Enter the data to be updated in appropriate fields.

Figure 5: Enter details to Update Contact

- Click **OK**.
- The text you entered in the **Update Contact** dialog box appears in the Smart Box.
- Click the **Process** button to update the looked up contact.



If you try the update option and click the **Process** button without a looked up contact, you get an error message. This message prompts you to lookup for a contact.

Defer:

Click this option to open a new page where you can defer a task. Use the Navigation buttons to view the previous or next page. This option also shows the number of deferred items.

Click the down arrow to view the deferred items. This list displays up to 10 deferred items. The deferred data is also saved as an RTF file, which can be viewed under the **Show History** option.

Delete:

Click to delete the text entered in the Smart Box. If the Smart Box contains deferred data, the data is also deleted from the corresponding deferred log. Similarly, if the text refers to processed data, then the data is removed from the corresponding process log.

New:

This option enables you to enter new text in the Smart Box. Once you click here, the data in the Smart Box and Lookup Box is removed. If you have selected **template mode** in the [Miscellaneous settings](#), then the text is cleared and the template is displayed with title Schedule and Add Contact (Referral).

Process:

Click to transfer multiple details related to a selected contact in ACT!. Enter different types of details like meeting, call, reference, update a field and other activities. Right-click on the text and assign the corresponding field or activity to the selected text. Now as you click the Process button, the text in the Smart Box is transferred into corresponding fields or scheduled as corresponding activity in single click. Refer to [Chapter 2.7](#) for more details.

Timer:

The Standard Toolbar also displays a timer at the lower right end of the toolbar. Click on the down arrow to Reset or Start / Pause this timer.



Figure 6: Timer

You can use this option to estimate the time spent with a particular contact. When you schedule an activity to a contact, the time spent is also transferred to the Notes tab of the contact.

2.5. Display ACT! Time Zone

You can add Time display next to the **Lookup** box in the AddressGrabber Suite toolbar.

Click the drop-down arrow next to the **Go** button and select the option **Display Contact Clock**.

Now the current time along with the time zone in the location of the currently opened contact in ACT! is displayed next to the **Lookup** box.



Figure 7: Contact Clock

As you navigate through the contacts in ACT!, the corresponding time is displayed for the selected contact.

2.6. Lookup Time Zone

You can lookup the time zone of selected contact information.

The time is calculated based on the following attributes:

- Country
- State
- City
- Phone Numbers
- US Zip code
- Time Zone

You need to select the contact details that contain any one of the above parameters.

Select a contact in ACT! or highlight a contact in any other source like documents, web pages and others. You can also enter the contact details in the Smart Box. Now click **Lookup Time Zone** button in the toolbar. You can add this button to the toolbar using the Add/Remove Buttons option.

The **Lookup Time Zone** dialog box appears displaying the input text, the current time of the selected contact, time zone of the selected contact and the time difference in hours.



Figure 8: Lookup Time Zone

The time is calculated based on your system clock.

2.7. Process Multiple Data

Use the Process Button in the Standard Mode Toolbar to transfer the entire data in the Smart Box into appropriate fields in your application.

Example:

Enter multiple data in the smart box.

Right click on the text to assign corresponding field as shown in [Figure 9](#).

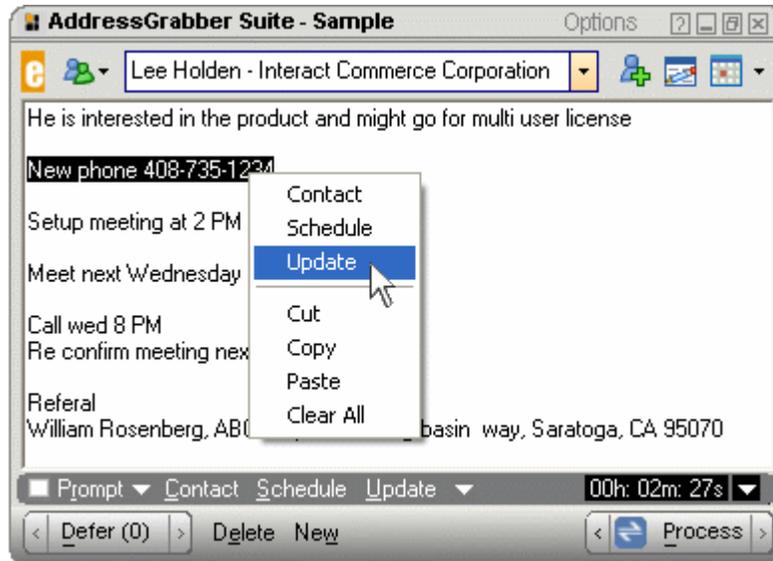


Figure 9: Assign Fields to text

Now the data appears as shown in [Figure 10](#).

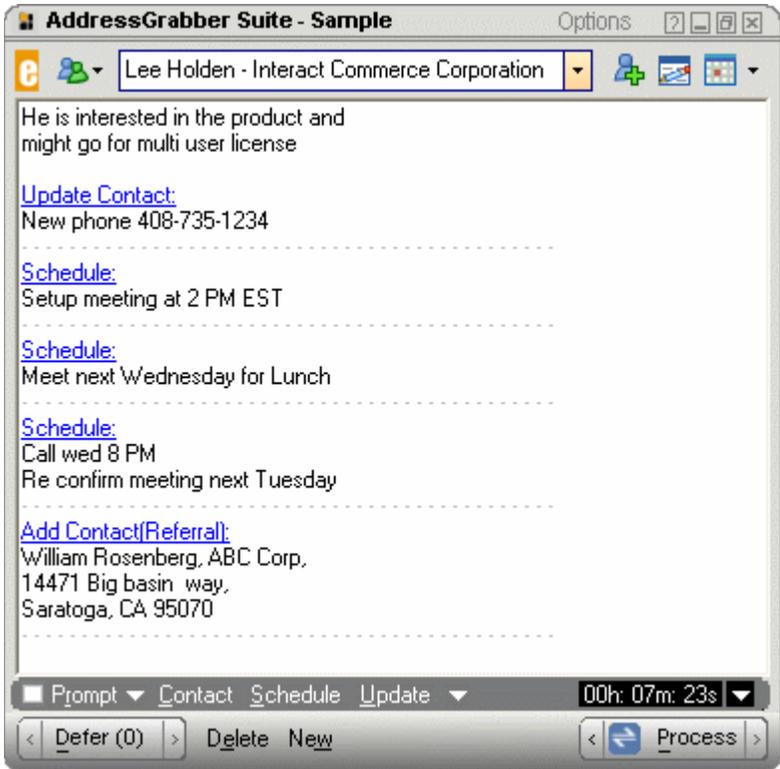


Figure 10: Data with assigned fields

Now click the **Process** button.

The data in Smart Box is transferred to corresponding fields and a Progress bar appears indicating the process of data along with the respective activity and the contact name.

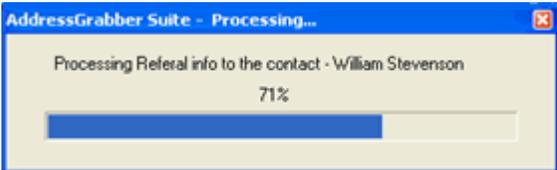


Figure 11: Progress Bar – Processing data

After the process is complete, the contact is updated with corresponding fields and activities.

3. Customize AddressGrabber Suite

You can customize the contact information being transferred to your database. You can change the format, the default settings like timing to be scheduled for an event, alarm time etc.

Click **Options > Settings** in the Toolbar to open the **Settings** dialog box and you can change the following options.

Click	To do...
 HotKeys	Enable / Disable Shortcut Keys.
 Destination Setup	Setup your Destination and transfer options.
 Miscellaneous	Setup additional options like setting My Contact and other settings.
 Format Options	Format the contact information, phone/fax, email etc., before transferring to your database.
 Default settings	Setup the time to be scheduled for an event, alarm time and other options.

The contact information is transferred according to the customized settings you have setup in this window.

3.1. Shortcut Keys

Click **Options > Settings** in the Toolbar. Click **Hot Keys** to open the Hot Keys window.

This window displays the list of functions with the already setup shortcut keys displayed next to the functions.

 The shortcut key overrides any other function in the computer that uses the same key setup in AddressGrabber Suite. If you want to use a shortcut key for the other function, you can disable the corresponding key in AddressGrabber Suite.



Figure 12: Enable / Disable Hot Keys

Select / Clear the checkbox next to the function, to enable / disable the shortcut key.

Click **OK** to save the settings.

3.2. Destination Setup

You can select the destination and setup the transfer options for the selected destination.

Click **Options>Settings** in AddressGrabber Suite Toolbar.

In the window that appears, Click **Destination Setup**.

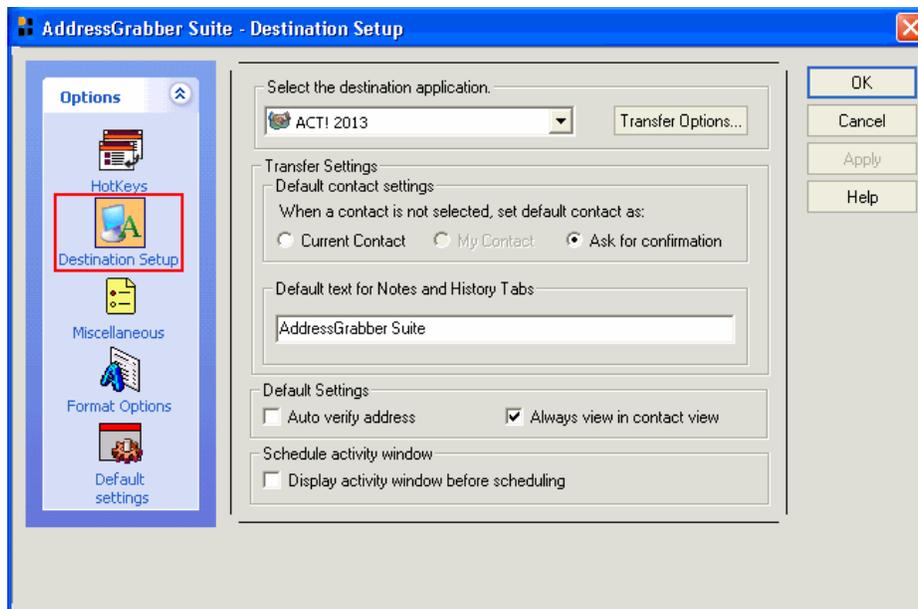


Figure 13: Destination Setup

Under **Select the destination application**, select your destination from the list.

- Click **Transfer Options** to setup the [Database Login](#), [Transfer setup](#) and [Duplicate Check](#).

Under **Transfer Settings**,

Select one of the following options, when you try to update a contact or schedule an activity without selecting a lookup contact.

- **Current Contact:** The data is processed automatically to the currently selected contact.
- **My Contact:** The data is processed automatically to the contact setup as "My Contact".
- **Ask for confirmation:** A dialog box appears prompting you to select any one of the following options:

Select	To do...
Add as new contact	Adds the incoming contact as a new record to ACT!
Update current contact	Updates the currently open record in ACT!
Skip transfer	Cancels the process

- Select the **relevant** option and click **OK**.

Under **Default text for Notes and History Tabs**,

- Enter the text that can be added to the Notes and History tab of the looked up contact, whenever you add or update a contact, schedule an activity or modify other details

Under **Default Settings**,

- Select **Auto verify Address** to verify the address being transferred with the USPS website.
- Select **Always view in contact view** to view the transferred contact in the Contact View of ACT!.



You must have already selected the option **Confirm extraction results before sending** in the [Miscellaneous](#) Setup to enable the **Auto Verify Address** option.

Under **Schedule activity window**,

- Select **Display activity window before scheduling** to display the Confirmation Window in ACT! when you schedule an activity using the **Process** button. If this option is not selected, then the activity is scheduled without displaying any confirmation window.



The above option displays or hides the confirmation window only when you are transferring multiple data using the **Process** button. When you schedule an activity using the **Add Activity** button, the confirmation window is always displayed by default.

Click **OK** to save the settings.

3.3. Miscellaneous setup

You can setup various options in the **Miscellaneous** setup.

Click **Options > Settings** in the Toolbar. Click **Miscellaneous** to open the dialog box.

In the window that appears, you can setup the following options:

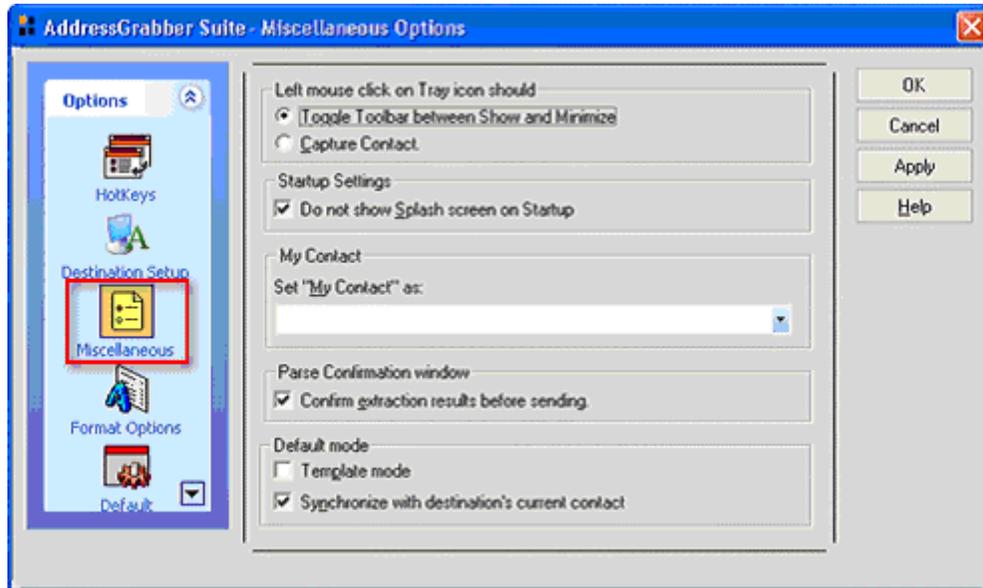


Figure 14: Miscellaneous Setup

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 AddressGrabber Suite Toolbar is shown or hidden.
- **Capture Contact**: Select this option so that when you click on the Tray Icon, AddressGrabber Suite performs the function of the **Go** Button.

For **Example**, if you have selected **Update Contact** as the **Go** Button, you can click the Tray Icon to update a contact. If you change the **Go** button as **Add Activity**, then you can click the Tray Icon to schedule an activity to a contact.

Under **Startup Settings**,

- **Do not show Splash screen on Startup**: Select this option to hide the Startup screen that appears when you launch AddressGrabber Suite.

Under **My Contact**,

- **Set "My Contact" as**: Select a looked up contact as **My Contact** from this list.

Under **Transfer Settings**,

Select one of the following options, when you try to update or schedule an activity without selecting a lookup contact.

- **Current Contact:** The data is processed automatically to the currently selected contact.
- **My Contact:** The data is processed automatically to the contact setup as "My Contact".
- **Ask for confirmation:** A dialog box appears prompting you to select any one of the following options:

Select	To do...
Add as new contact	Adds the incoming contact as a new record to ACT!
Update current contact	Updates the currently open record in ACT!
Skip transfer	Cancels the process.

- Select the relevant option and click **OK**.

Under **Parse Confirmation Window**,

- Select **Confirm extraction results before sending** checkbox to view the Address Confirmation Window whenever you transfer a contact.

Under **Default mode**,

- **Template mode:** In the Standard Mode Toolbar, you can click **New** to clear the text available in the Smart Box and to enter new text. Select this option to enter new text with a standard template. When you click **New** with this option enabled, the text in Smart Box is cleared and a new template is opened that displays the title **Schedule** and **Add Contact (Referral)**.
- **Synchronize with destination's current contact:** When you select this option, the looked up contact in the Lookup Box is synchronized with the currently opened contact in ACT!



Click the title bar in the AddressGrabber Suite toolbar to synchronize the looked up contact.

Click **OK** to save the settings.

3.4. Format Options

You can setup to change the format of the contact information before transferring to your database.

Click **Options > Settings** in AddressGrabber Suite Toolbar.

In the window that appears, Click **Format Options** to setup to format the following options:

3.4.1. Format Contact Fields

In the **Contact** tab, all the contact fields are displayed.

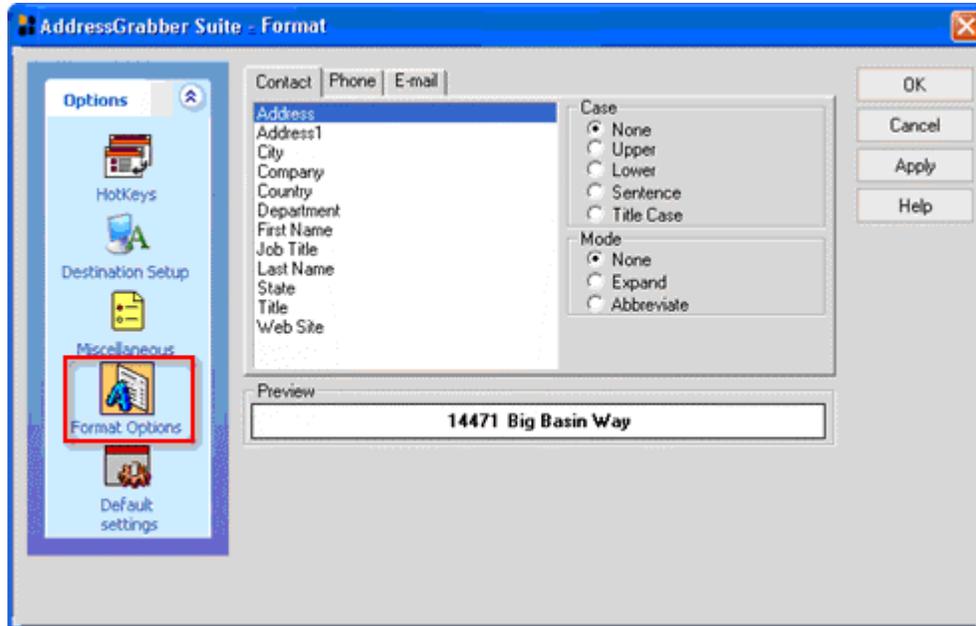


Figure 15: Format Contact Fields

Select any field to format. **Example: Company.**

Under Case, select a format to change the case of the text. Assume that the value for Company is eGrabber Inc. The text is formatted as shown in the table.

Case	Output
None	eGrabber Inc. (Value is not formatted)
Upper Case	EGRABBER INC.
Lower Case	egrabber inc.
Sentence Case	Egrabber inc.
Title Case	Egrabber Inc.

 Note: You can select multiple fields by pressing **Shift + Down arrow** and select a format. The selected format is applied for all the selected fields. The option **None** is selected by default

Under Mode, select a format to display the text in expanded or abbreviated mode. Assume that the value for Company is **eGrabber Inc.**

The text is formatted as shown in the table:

Mode	Output
None	eGrabber Inc. (Value is not changed)
Expand	EGRABBER INCORPORATE (value is expanded)
Abbreviate	EGRABBER INC. (Value is abbreviated)

Click **OK** to save settings.

3.4.2. Format Phone/Fax fields

Click the **Phone** tab

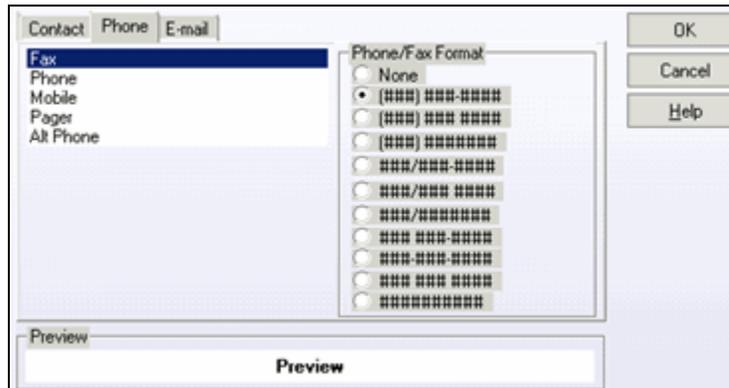


Figure 16: Format Phone/Fax fields

In the window that appears, select a field to format. **Example:** *Work Phone*.

Select a format for the field under the **Phone/Fax Format**. Click **OK**.

3.4.3. Format E-mail field

Click the **E-mail** tab

You can setup format option for two e-mail fields. Select a field under the E-mail Tab. **Example:** *E-mail*.

Select a format for the e-mail field under the E-mail Format.

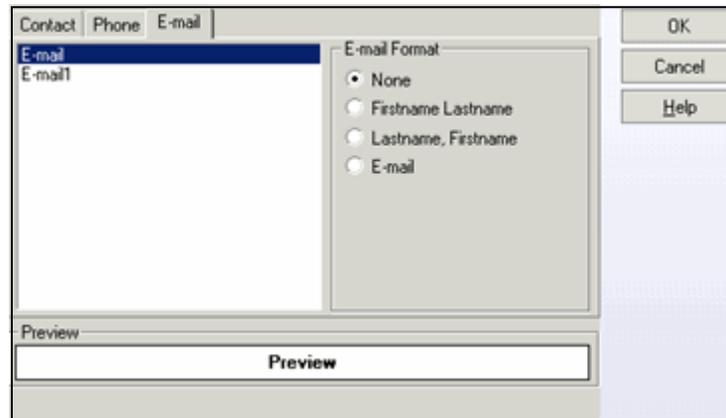


Figure 17: Format Email field

None: This option is selected by default. Select this option to transfer the value as it appears in the selected contact information.

First Name Last Name: Assign the Contact's First Name and Last Name along with e-mail address.

Example: If the contact's first name is "William" and last name is "Stevenson" then the e-mail address is assigned as "William Stevenson <wsteve@hotmail.com>".

Last Name, First Name: Assign the Contact's Last Name and First Name along with e-mail address.

Example: If the transferred contact's name is "William Stevenson" then the e-mail address is assigned as "Stevenson William <wsteve@hotmail.com>".

E-mail: Transfers only the e-mail address value to your database. **Example:** <wsteve@hotmail.com>.

Click **OK**. The contact information is transferred to your database in the formatted mode.

3.5. Modify Default Settings

You can specify the settings so that AddressGrabber Suite accurately identifies the schedule you type in the **Smart Box**.

Click **Options > Settings** in the Toolbar. Click **Default Settings** to open the **Default Time Settings** window.

In this window, you can specify the following options:

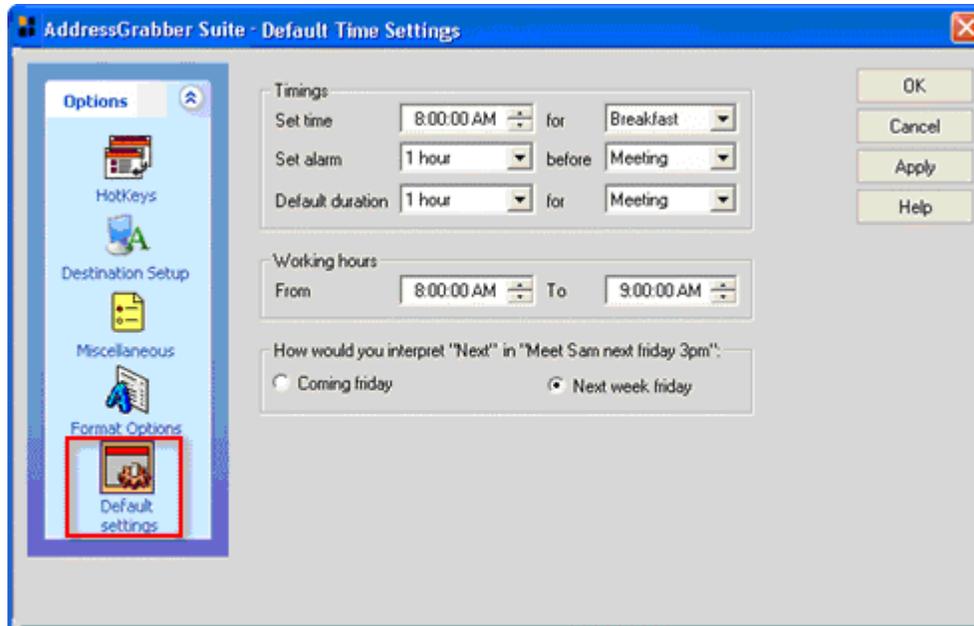


Figure 18: Modify Default Settings

Under **Timings**,

- ◆ **Set time:** Select the time at which the specific event to be scheduled (Select from Breakfast, Lunch, Tea or Dinner and the time). By default, the time is displayed as **8:00 AM** for **Breakfast**.
- ◆ **Set alarm:** Set the alarm notification for an activity by specifying the hours before which you need to be reminded of the activity. By default, the alarm is set for 1 hour and the activity is set as Meeting.
- ◆ **Default duration:** Set the average duration of your activity. By default, the duration is set for 1 hour and the activity is set as Meeting.

Under **Working hours**, specify the beginning and ending time of your working hours, so that the time you enter in the **Smart Box** is automatically detected as A.M. or P.M. By default, these timings are set as 8:00 AM and 9:00 AM respectively.

 Ensure that **To** time is always greater than **From** time.

Under **How would you interpret "Next" in "Meet Sam next Friday 3pm"**,

- ◆ **Coming Friday:** Set the scope of the word **Next** to be interpreted as the immediate occurrence of the day.
- ◆ **Next week Friday:** Set the scope of the word **Next** to be interpreted as the occurrence of the day by next week. This option is selected by default.

Click **OK** to save the settings.

4. Transfer to ACT!

After you have setup all the options, you can start transferring the contact information from your source document to ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011.

Before transferring the information you have to login into the database and you can setup to check for duplicates to avoid transferring duplicate entries.

 The procedure explained in the following section is common to ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011.

4.1. Database Login

Ensure that you have already opened ACT! in your system. You have to again login from AddressGrabber Suite to transfer the contact information more accurately.

Click **Transfer Options**, which is available in

- ◆ The Action Button **Go**
(OR)
- ◆ Right Click the Tray Icon, click **Capture It!**
(OR)
- ◆ Click **Options > Settings** and select **Destination Setup**.

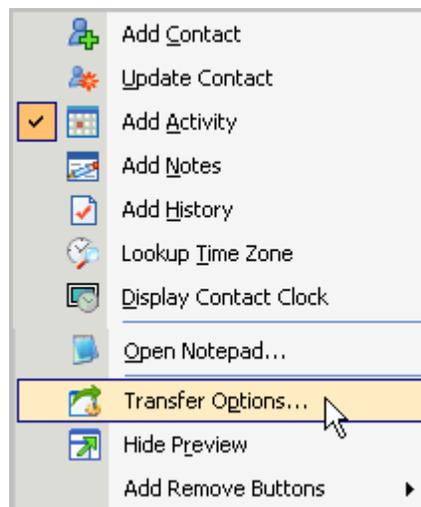


Figure 19: Transfer Options

The **ACT! Link Options** dialog box appears.

Click the **Login** tab and enter the following details:

Figure 20: Database Login

- ◆ **Database File:** The database name and path of the opened ACT! database is automatically displayed.
- ◆ **UserName:** Enter the login name of your 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. If the exact details are not provided, then the message **Login Failed** is displayed.

If **ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011** is your destination; transfer of records is not possible in the following cases:

- If the security level for the user in ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 has been set as **Browse**.
- If the login access for the user has been set as **Inactive**.
- If you have upgraded from previous version of ACT! and not converted the database from the previous version to latest version of ACT!.

Click **OK** to save the settings.

4.2. Transfer Company Setup

You can setup to transfer the contact information either to the Business or Home section in ACT!.

Click the **Transfer Company** tab in **ACT! Link Options** dialog box.

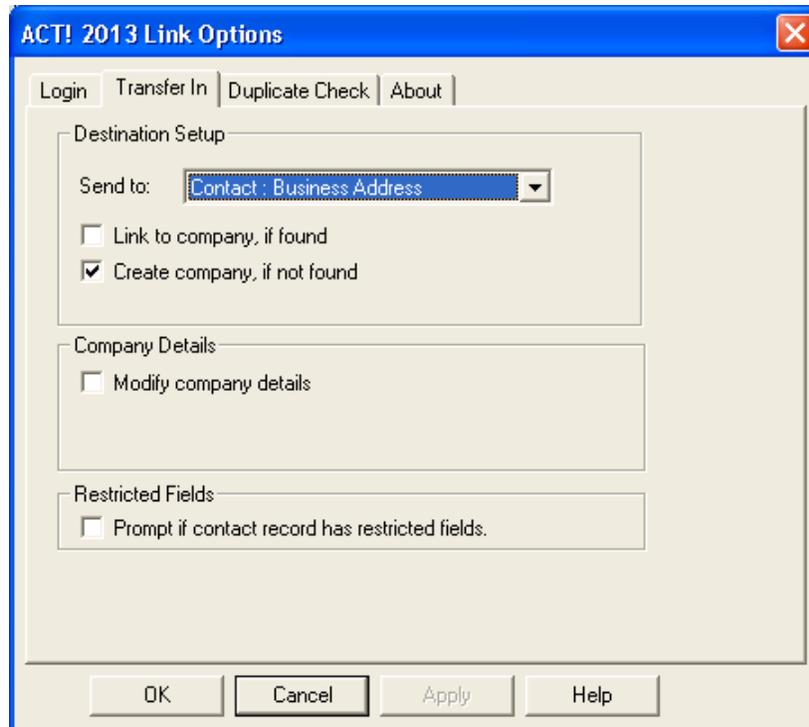


Figure 21: Transfer Company Setup

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 company details on ACT! With the new details being transferred.

If you have selected ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 as your destination, you can find the following option in addition:

- Select **Prompt if contact record has restricted fields** to get a warning message if ACT! 2019 / 2018 / 2017 / 2016 / 2015 / 2014 / 2013 / 2012 / 2011 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 **OK** to save the settings.

4.3. Check for duplicates

You can setup the duplicate check to prevent transferring duplicate contact information to ACT!.

AddressGrabber Suite provides various options to handle the duplicate records.

Click **Transfer Options** in the **Go** button in the Toolbar

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

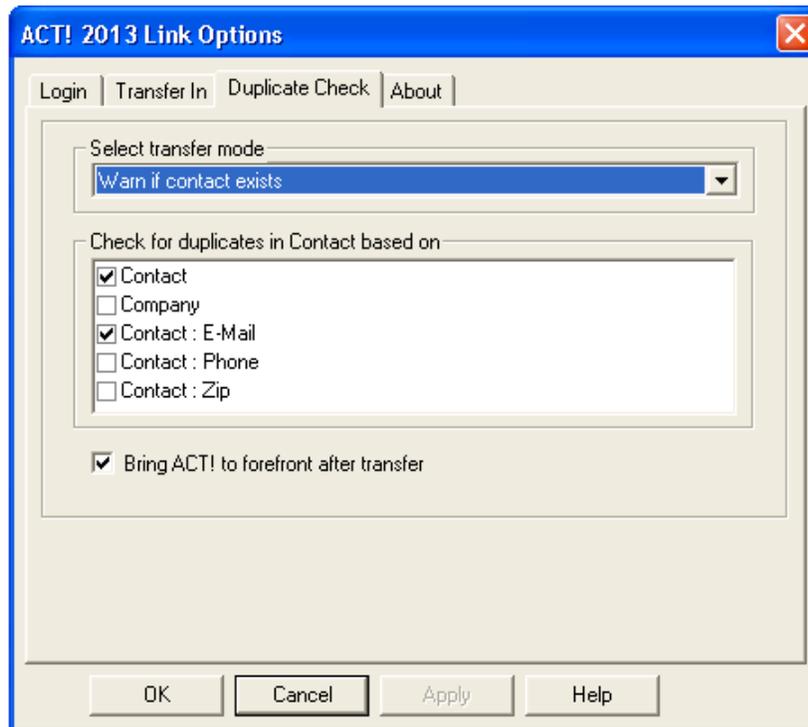


Figure 22: Setup to check for duplicates

Under **Select transfer mode**,

- (a) Select **Add as new** to add the duplicate record as a new contact to your database.

Example:

Incoming Address	Existing Address	Transfer Mechanism
William Stevenson 14471, Big Basin Way, Saratoga, CA 95070, USA	William Stevenson 14471, Big Basin Way, Saratoga, CA 95070, USA	A new contact "William Stevenson" is created in ACT! database.

- (b) Select **Update if contact exists** to update an existing contact in your database.

Incoming Address	Existing Address	Transfer Mechanism
William Stevenson 14470, Big Basin Way, Saratoga, CA 95070, USA	William Stevenson 14471, Big Basin Way, Saratoga, CA 95071, USA	The existing contact is updated in your database as the address has changed for the incoming contact.

- (c) Select **Warn if contact exists** to receive a warning message when you transfer a duplicate contact to your database. During the transfer of a duplicate contact, a **Contact Linker** dialog box appears with the following options:



Figure 23: Contact Linker

Select	To...
Add as New contact	Adds the duplicate record as a new record in your database.
Update existing contact	Updates an existing record with the new incoming details in your database.
Skip contact	Cancel transferring the duplicate record to your database.

 If more than one contact exists in the database that matches the incoming record, then the **Update** option is disabled in the above dialog box. In this case, you can select to add the duplicate record as a new record or cancel transferring the record to your database.

- (d) Select **Cancel if contact exists** to cancel transferring the duplicate contact to your database.

When you select any of the above options except **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.

- ◆ **Name:** 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.

Example for Duplicate Check: Set the Option “Warn if contact exists “and select the fields “Name” & “E-mail””.		
Incoming Candidate Address	Existing Candidate Address	Transfer Mechanism
William Stevenson 14471, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	William Stevenson 14471, Big Basin Way, Saratoga, CA USA 95070 Support@egrabber.com	Although name of the incoming contact matches the existing contact, the email is different. Therefore, a new contact is created in your database.
Robin Williams 14471, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	Robin Williams 14871, Big Basin Way, Saratoga, CA USA 95070 Sales@egrabber.com	In this case, the name and e-mail of the existing contact match the incoming contact. A Contact Linker dialog box appears displaying different options. You can select to update the existing contact or add it as a new contact or cancel transferring the duplicate contact to your database.

Bring 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.

After you have setup the options, you can transfer the contact information to ACT!.

4.4. Transfer a new contact

Select the contact information from your source like document, email, or web page. You can also provide the contact details in the **Smart Box** in AddressGrabber Suite Toolbar.



Figure 24: Contact Information selected

In the AddressGrabber Suite Toolbar, click the **Add Contact** button.

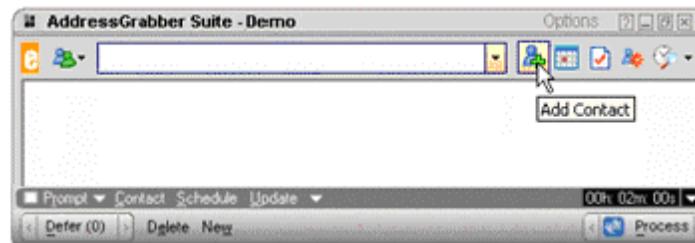


Figure 25: Add a Contact

The **AddressGrabber Suite - Confirmation Window** appears where you can verify the contact details. You can also verify the address with the USPS website and format the contact information. Refer to [Chapter 4.5](#) for more details about the Address Confirmation Window.

 A screenshot of the 'AddressGrabber Suite - Confirmation Window'. The window has a blue title bar with a close button. The main area contains a form with the following fields:

Salutation	First Name	Last Name
	William	Stevenson

 Below this is a tabbed interface with 'Contact Info' and 'Format' tabs. The 'Contact Info' tab is active and contains:

Company	eGrabber Inc.	Phone		Extrc	
Job Title	Sales Manager	Phone1		Extrc	
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		

 Below the form is a 'Verify Address' button. Underneath are two checked checkboxes: 'Use Format Options' and 'Display parse result window'. A section titled 'Captured Text:' contains a text area with the following text:


```
William Stevenson
Sales Manager
eGrabber Inc.
14471 Big Basin Way,Suite E
Saratoga, CA 95070
sales@egrabber.com
william@egrabber.com
```

 At the bottom of the window are four buttons: 'Transfer' (with a person icon), 'Cancel', 'Parse Again', and 'Help'.

Figure 26: Address Confirmation Window

Click **Transfer** in the Confirmation Window.

A new contact is created in ACT! either in primary address or in the Home Address tab according to the options, you have setup in **Transfer Company**.

If you have selected the option **Bring ACT! to forefront after transfer** in the **Duplicate Check** tab, the contact created in ACT! is displayed in front of all the windows.

Contact Detail		View Groups/Companies...
Company	eGrabber Inc. ...	Address
Contact	William Stevenson ...	14471 Big Basin Way
Salutation	William Key Contact <input type="checkbox"/>	Suite E
Title	Sales Manager	
Department		City
Phone	Ext	Saratoga
Mobile		State
Fax		CA
Alternate		ZIP Code
		95070
		Country
		United States
		Web Site
		www.egrabber.com
		E-mail
		sales@egrabber.com

Figure 27: Contact created in ACT!

 You can hide the Confirmation Window by selecting the option **Hide Preview** in the Action Buttons available in the Toolbar. The contact information is directly transferred to ACT! without displaying the Confirmation Window.

4.5. AddressGrabber Suite – Confirmation Window

When you transfer contact information, the **AddressGrabber Suite - Confirmation Window** appears displaying the extracted contact details from the source text. Refer to Figure 26 that illustrates this window. You can verify and edit the extracted information and then transfer the data to your database.

Contact Info: This tab appears by default and displays the extracted contact information. You can edit this information. In the bottom of the window, the captured text is displayed.

- ◆ **Verify Address:** Click this option to verify the address details with the USPS website. When a matching record is found, the official Postal address format is displayed.

Address Verification Request

Following is the Original Address:
COMPANY: eGrabber Inc.
ADDRESS: 14471 Big Basin Way,Suite E
 :
CITY : Saratoga
STATE : CA
ZIP : 95070

Below is the correct ZIP+4 code for the original address

Official Postal Format

COMPANY: EGRABBER INC.
 ADDRESS: 14471 BIG BASIN WAY STE E
 CITY : SARATOGA
 STATE : CA
 ZIP : 95070-6182

Apply USPS format (UPPER CASE)
 Do you want to replace the original address?
 Yes No

Figure 28: Address Verification - Result

Click **Yes** to replace the captured address with official postal address. Select **Apply USPS Format (UPPER CASE)** to replace the address in Upper Case.

 The USPS address format is normally displayed in Upper Case. If you want to transfer addresses in the original format or in the format you have setup in the **Format Options**, then clear this option.

- ◆ **Use Format Options:** Select/clear this option to apply/not apply the format you have setup.
- ◆ **Display parse result window:** Select/clear this option to show / hide the Address Confirmation window.

Format: Click this tab to format the values of the Contact, Phone/Fax, and Email fields in the address. The same options are also available in the **Settings** Dialog Box. Refer to [Format Options](#) for more details.

 You can setup to format all the addresses being transferred by using the **Format Options**. If you want to change the format for a specific address, use the **Format** tab in the **Confirmation** Window.

Transfer: Click this option to transfer the contact information to your database.

Cancel: Click this option to close the window without transferring the information.

Parse Again: Click here to capture the information again. You can use this option when you have made any changes in the Address Confirmation Window, and you want to revert to the original information.

4.6. Update an existing contact

When duplicate contact information is transferred, an existing contact is updated with the new details according to the options you have selected in the duplicate check.

You can also manually update a contact by typing the details in the **Smart Box**.

Ensure that you have selected the contact to be updated in ACT!.

After entering the details in the **Smart Box**, click the **Update Contact** button in the Toolbar.

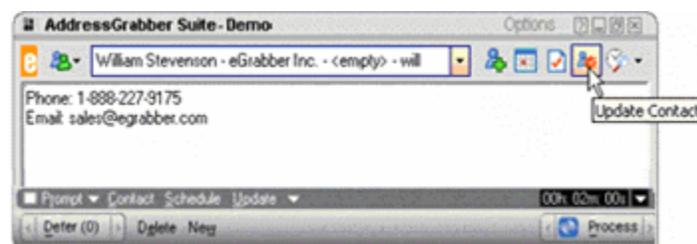


Figure 29: Update a Contact

The **AddressGrabber Suite - Confirmation Window** appears displaying the details that you have entered in the Smart Box. You can verify and edit the details.

Click **Transfer** to update the selected contact in ACT! with the new details. The existing information in the updated contact is transferred to the History section of ACT!.

- If you have not selected any contact in ACT!, the data is updated according to the settings you have made in the [Destination setup](#).
- If you have selected the option **Ask for confirmation** in the **Miscellaneous** setup, then a dialog box appears prompting you to select any one of the following options:

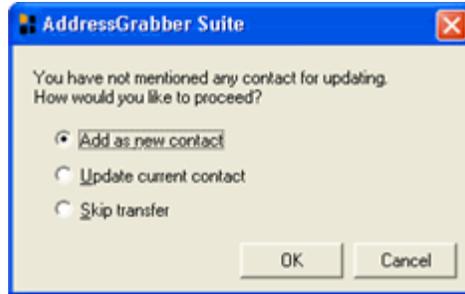


Figure 30: Window that appears when no contact is selected

Select	To do...
Add as new contact	Adds the incoming contact as a new record to ACT!
Update current contact	Updates the currently open record in ACT!
Skip transfer	Cancels the process.

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

 You can hide the Confirmation Window by selecting the option **Hide Preview** in the Action Buttons available in the Toolbar. The contact information is directly transferred to ACT! without displaying the Confirmation Window.

4.7. Schedule Activities

You can enter your activities, notes, or any other details to be added to the contact in ACT! in the Smart Box.

Example: Meeting at 11:00 AM.

You can add the activities to selected contact in ACT!, or to a contact in your Buddy List.

Click **Add Activity** in the Toolbar to add the text in the **Activities** tab of ACT!.

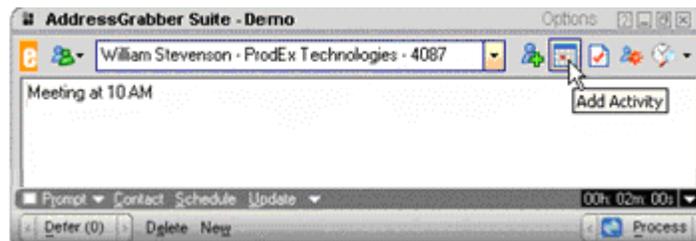


Figure 31: Adding an Activity

You can also schedule the activity along with the time zone.

For **Example**, you can mention the time as 11:00 AM Eastern Time. If you are in the Pacific Time zone, the time is converted according to your time zone, i.e. 8:00 AM and saved in ACT!.

You can also schedule the activities by mentioning the contact name in the activity.

Example: *Meeting with William at 11:00 AM.*

AddressGrabber Suite automatically looks up for the contact "William" and adds the activity. If more than one record is found, a window appears listing all the duplicate records as shown in Figure 32.

You can select the relevant record from this **Duplicates Found** window and click **OK**. The activity is added to the selected record.

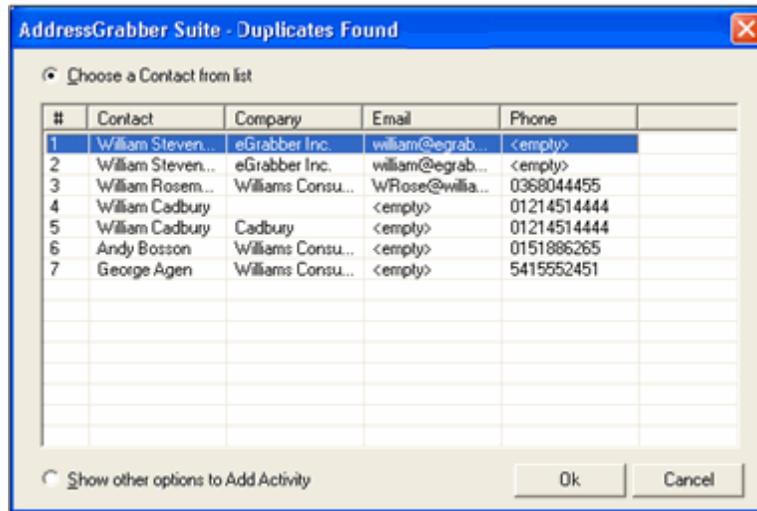


Figure 32: Add Activity - Duplicates Found

Show other options to Add Activity: Select this option to open the dialog box as shown in Figure 33, where you can select any one of the following options:



Figure 33: Window that appears when no contact is selected

Select	To do...
Create contact and Add Activity	Create a new contact and add activity.
Add Activity to "My Contact"	Add the activity to contact designated as "My Contact" in Buddy List.
Add Activity to "Current Record"	Add the activity to currently open record in ACT!

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

- If you have not selected any contact in ACT!, the data is scheduled according to the settings you have made in the [Destination setup](#).
- If you have selected the option **Ask for confirmation** in the **Miscellaneous** Setup, then the above dialog box (Figure 33) appears and you can select the required option.

Click **Add History** in the Toolbar to add the text in the **History** tab.

Click **Add Notes** in the Toolbar to add the text in the **Notes** tab.

- If you have not selected a contact while adding History or Notes, then the data processed according to the settings you have made in [Destination setup](#).
- If you have selected the option **Ask for confirmation** in the **Miscellaneous** Setup, then a similar dialog box (Figure 33) appears for History and Notes. You can select the required option to handle the data.

5. List of Shortcut Keys

To access the options in the Toolbar:

Option	Shortcut Keys
Contact	ALT + C
Schedule Activity	ALT + S
Update Contact	ALT + U
Process	ALT + P
Defer	ALT + D
Prompt	ALT + R
Delete	ALT + E
New	ALT + W
Options	ALT + O

To execute the actions:

Function	Shortcut Keys
Add Contact	CTRL + SHIFT + C
Add Activity	CTRL + SHIFT + A
Add History	CTRL + SHIFT + S
Update Contact	CTRL + SHIFT + U
Add Notes	CTRL + SHIFT + N
Time Zone Lookup Clock	CTRL + SHIFT + T

 You can make use of the Shortcut Keys even when AddressGrabber Suite is minimized as Tray Icon.

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