

Quickest way to transfer email leads into your GoldMine database

Quick Start Guide

Takes only a few minutes to read...



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Welcome to eMail-Lead Grabber Business 2010!

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

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

- ◆ eMail-Lead Grabber Business Installation file
- ◆ Quick Start Guide
- ◆ Read Me (ReadMe.txt)
- ◆ Sample form e-mail, e-mail message and addresses

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Now, let us get started.

About eMail-Lead Grabber Business

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

System Requirements

- Pentium II/III + Processor, 128 MB RAM.
- 50 MB hard disk space to install the program and 100 MB free space to run the program
- Operating System:
 - Microsoft Windows Vista
 - Microsoft Windows XP

Source E-mail Software Supported

- ◆ Microsoft Outlook 2007/2003/2002/2000
- ◆ Outlook Express 6.0/ Outlook Express 5.x
- ◆ Other Source Applications Supported: Clipboard, Selected Text, Windows Explorer files (TXT, RTF, HTM/HTML)

GoldMine Versions Supported

- ◆ GoldMine 8.x / 7.x / 6.x / 5.x

Installing the Software

To install your new eMail-Lead Grabber Business:

- ◆ If you have the CD, double-click the eMail-Lead Grabber Business installation file in the eMail-Lead Grabber Business folder. Else, visit <http://www.goldmineaddons.com/products/registration/egb-wrg-reg.asp> to download the installation file.
- ◆ The Installation wizard provides step-by-step procedures to install the software. During Installation, select the "Destination Application" to install. To select GoldMine, select the checkbox next to GoldMine.

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

Registering the Software

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

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

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

Extend Trial Version: We also provide a Trial Extension Key so you can use eMail-Lead Grabber for a few more days before you make a decision to buy it. You can extend the evaluation period only once.

Using eMail-Lead Grabber Business

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

- ◆ [Step 1: Setup Email Account](#)
- ◆ [Step 2: Create a Template](#)

◆ [Step 3: Setup Filters](#)

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

Step 1: Setup Email Account

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

Setup Outlook

- Click **Accounts** on the eMail-Lead Grabber toolbar.

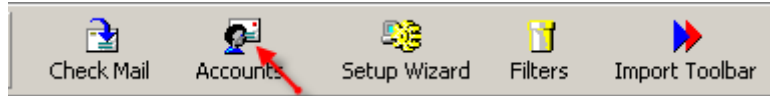


Figure 1: eMail-Lead Grabber Toolbar - Select Accounts

- Click **Add > Microsoft Outlook** to add an Outlook email account

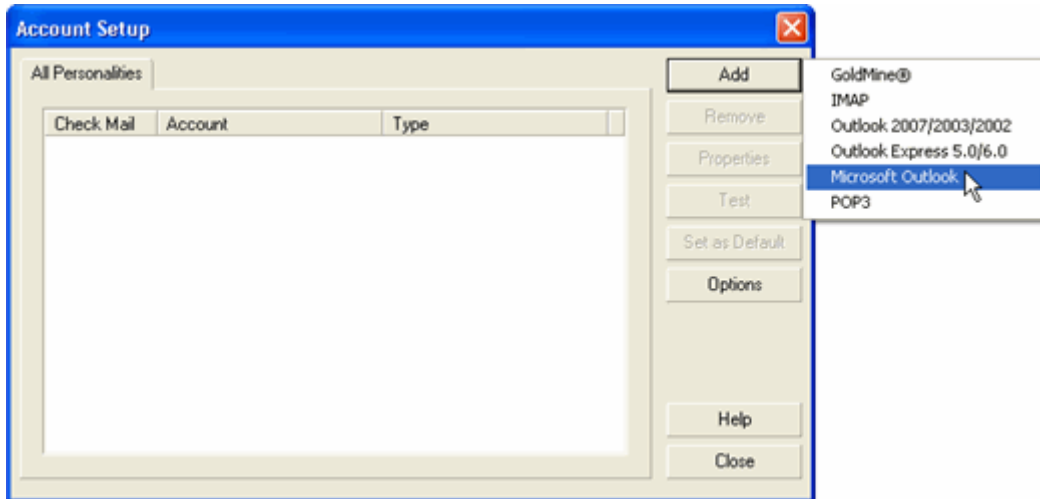


Figure 2: Account setup

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

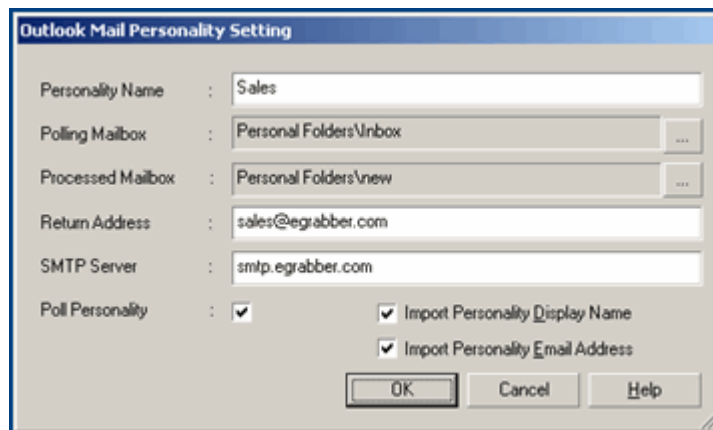


Figure 3: Personality settings for Outlook

- Click **OK** to save the settings.

Setup POP3

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

Step 2: Create a Template

1) Create Template in Advanced Mode:

- Right Click on the Web form Email, Point to **Create template** and click **Advanced Mode** to launch the template maker.

2) Create New Template:

- In the **TemplateMaker** window, click **File> New** to create a new template.
- In the **Template Type** list, select **Email Extract**
- In the **Select Contact Manager** list, select the appropriate GoldMine version
- Click **OK**



Figure 4: Create Template for GoldMine

3) Login to get GoldMine details:

- In the **Login** window that appears, Click **Get GoldMine details**.
- Enter your login information
- Click **Login**. The message "**Logged in Successfully**" appears in the **Status** box.

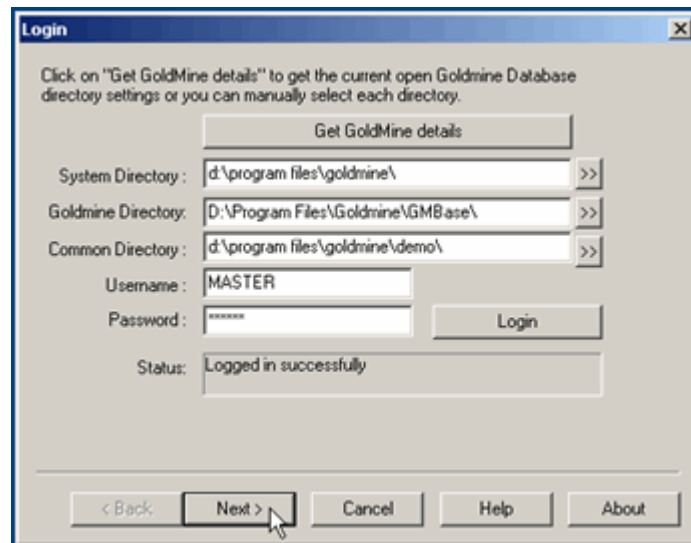



Figure 5: Login to GoldMine

- Click **Next**

 **Note:** Ensure that your GoldMine database is open to get the details

4) Select Detail Fields:

- In the **Details Selection** window that appears, select the Detail fields under **Detail Name** where you want to transfer the information.

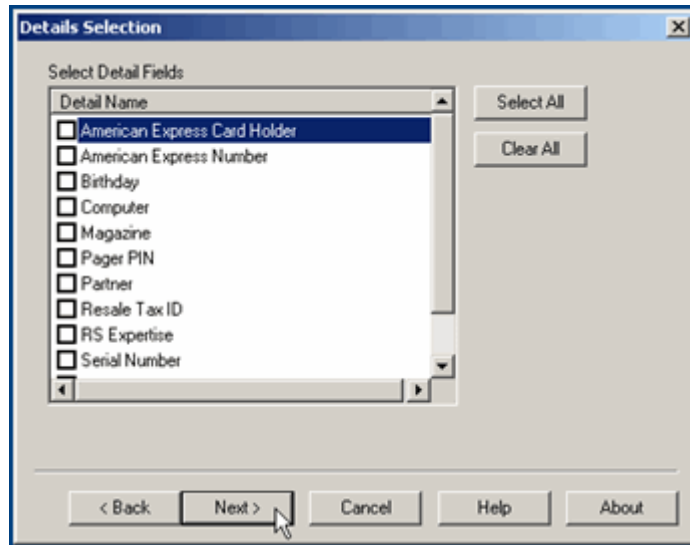


Figure 6: Select Details

- Click **Next**

5) Select User Fields:

- In the **Field Selection** window, select the **User Defined Fields** where you want to transfer information.
- Click **Next**.

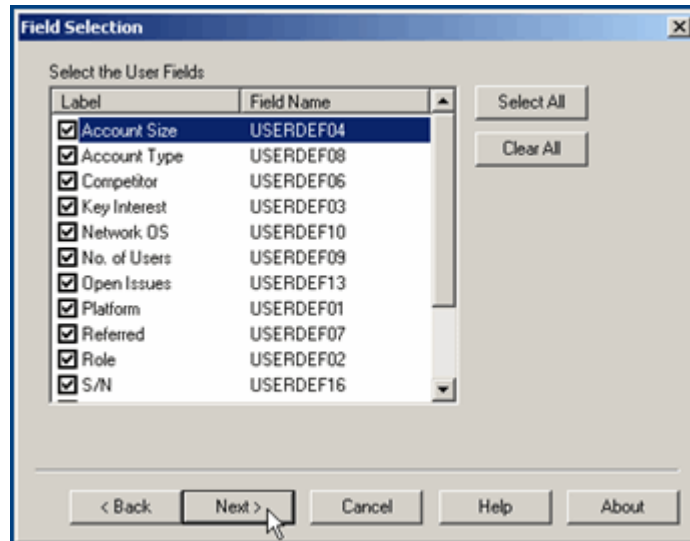


Figure 7: Select User Fields

6) Duplicate Check Setup:

- In the **Transfer Setup** window, Select the Fields to check for duplicates.
- Select the **Mode** or action to perform when a duplicate is found. Click **Next**

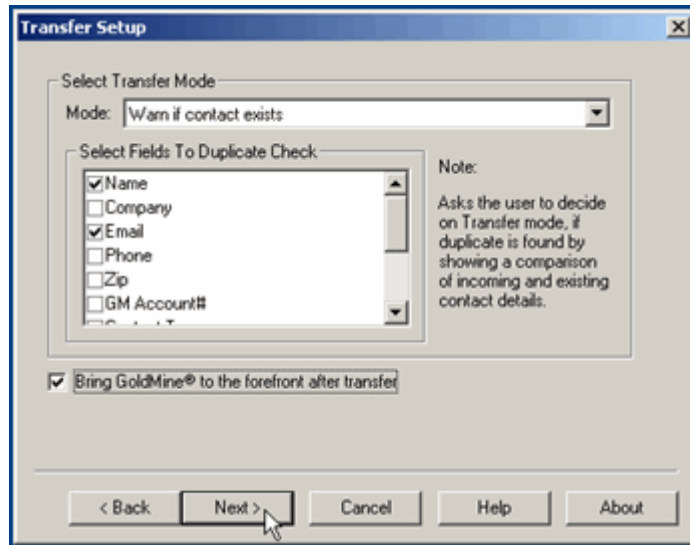


Figure 8: Check for Duplicates

7) Attach a Process:

In the **Processes** window, if you want to attach a process select **Attach a Process after transferring records to GoldMine®** checkbox

Select the processes to be attached to a contact. Click **Next**

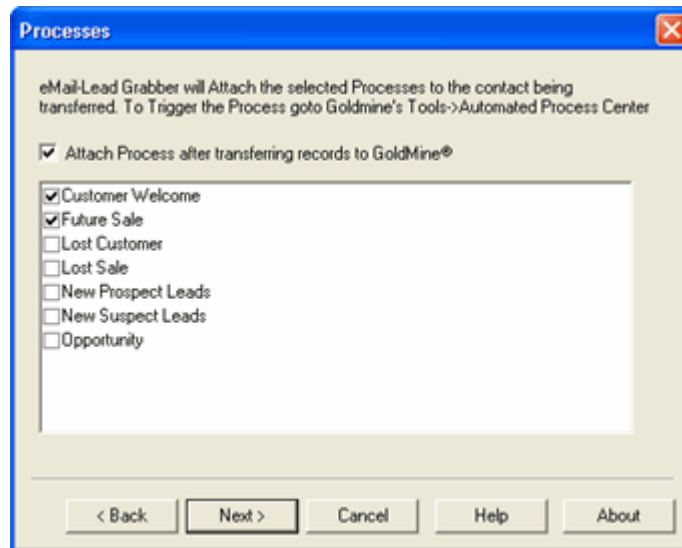


Figure 9: Attach Process

8) Schedule Activities:

In the Activities window, you can schedule activities when transferring contacts into GoldMine. Click New and select the type of activity to be scheduled.

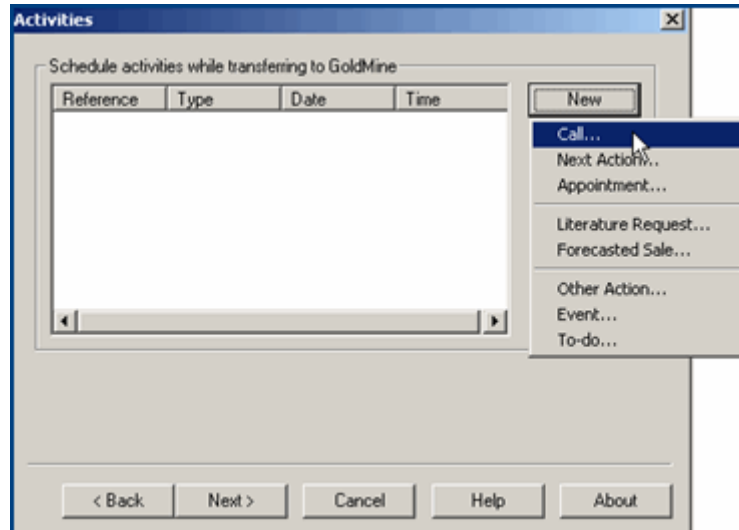


Figure 10: Schedule Activities

Click **Next**

9) Miscellaneous Setup

- The **Miscellaneous Settings window** allows you to customize miscellaneous details. Select the required settings. Click **Finish**

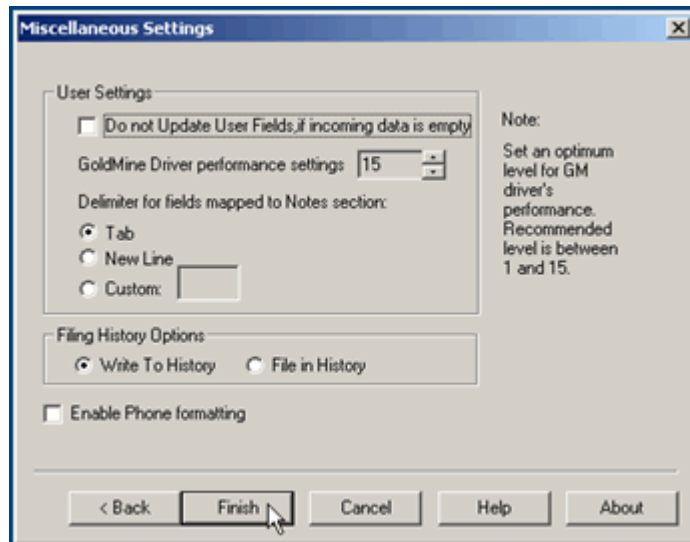



Figure 11: Miscellaneous Setup

10) Mapping the fields:

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

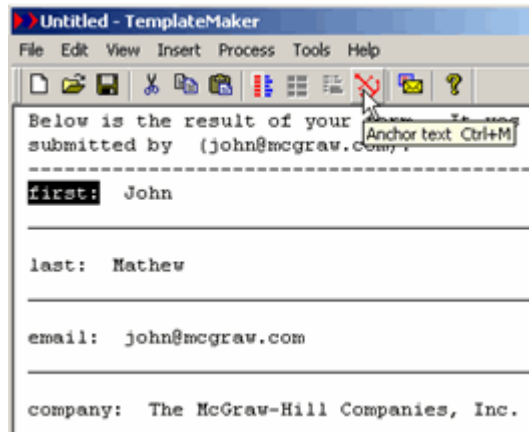


Figure 12: Mapping fields

11) Mapping the Values:

Select the Tag Value (in this case “John”) then click on the **Insert Field** button and select the appropriate field in GoldMine.

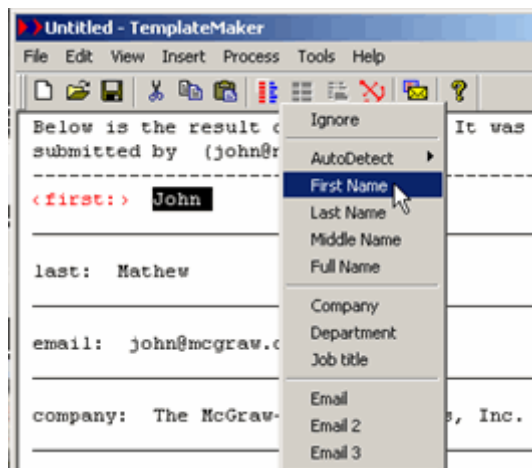


Figure 13: Mapping values

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

Step 3: Setup Filters

- 1) Click **Filters** on the eMail-Lead Grabber toolbar
- 2) In the **Filter Setup** window, Click **New** and type a name for the filter.

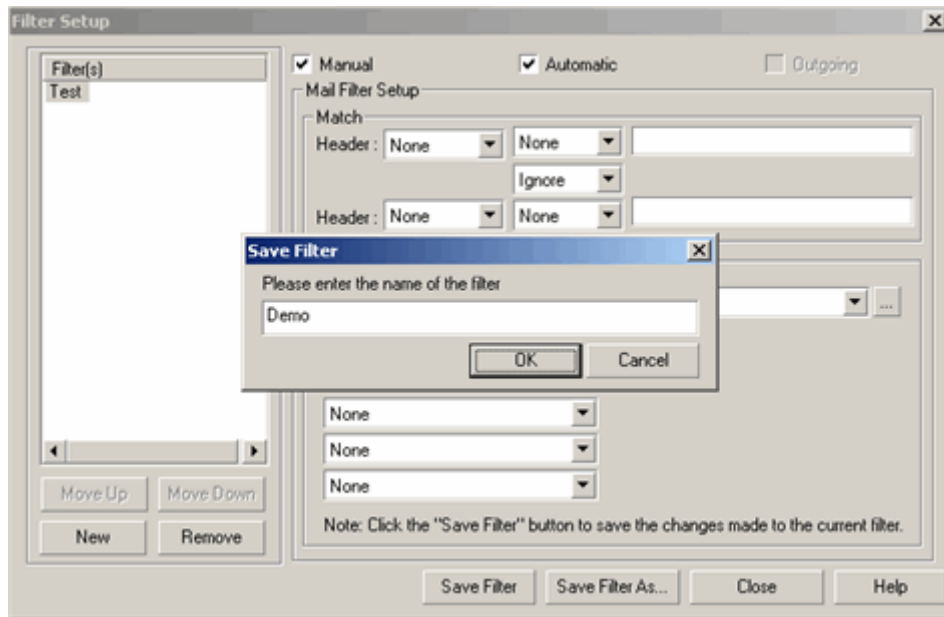


Figure 14: Create Filter

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

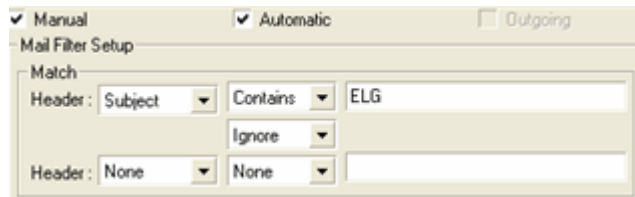


Figure 15: Filter - setup criteria

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

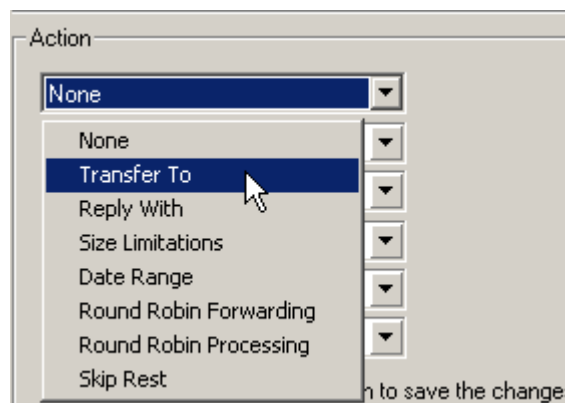


Figure 16: Filter - Setup Action

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

Process through Filters

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

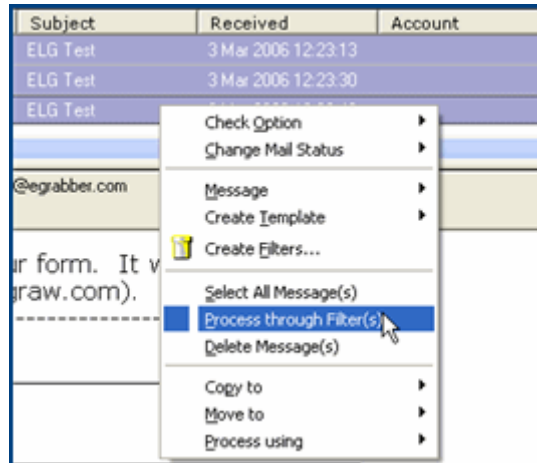




Figure 17: Process through Filters

- Click the  **Task Status** tab in the Status report at the bottom displays the percentage of progress that takes place during the transfer process.
- Click the  **Process Status** tab and the last column displays “Transfer Successful” if the form e-mail is successfully transferred to your database. The selected form e-mail is processed by the Sample Template and transferred to create new Contacts in GoldMine ® database. If your database is open, then the transferred contact is displayed in front of the window.

Transfer Form E-mail from your e-mail client

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

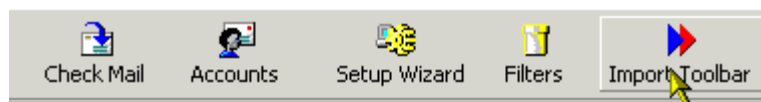


Figure 18: Select Import Toolbar

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

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

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

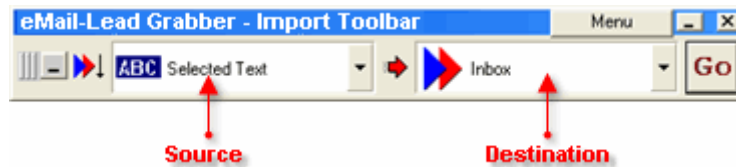



Figure 19: Import Toolbar

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

For more details, refer to Online Help

Technical Support

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

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