eMail-Lead Grabber

GMSQL 2008

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User Guide

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Contents

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 may receive sales leads through email, online forms and third party websites.

You need to maintain the leads in a database for efficient follow-up. In addition, you need to immediately respond to the prospects to prevent losing the leads.

eMail-Lead Grabber GMSQL transfers the data available in the email form into your GoldMine database automatically. This enables you to eliminate manual data entry, to 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.

What is on the CD?

The eMail-Lead Grabber GMSQL 2008 CD contains the following:

Item	Description
eMail-Lead Grabber GMSQL Installation files	Files required to install eMail-Lead Grabber GMSQL 2008.
Quick Start Guide	Quick Start Guide provides a short tour about the Software.
ReadMe.Txt	Text file that provides technical information.
Sample Web Form Email Messages	To get familiar with the product, you can use the sample messages to test the transfer of information.
Sample Templates	You can test the transfer of information using the sample templates.

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.

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 Email Content:** You can save the email contents as a text file and attach to the transferred contact record.
- **Auto-distribute Email:** 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.

Supported Applications

eMail-Lead Grabber GMSQL 2008 supports the following applications:

- GoldMine 8.x / 7.5.x / 7.x / 6.x / 5.x
- GoldMine 8.x / 7.x – Web Import

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

- Microsoft Outlook 2007/2003/2002/2000
- Outlook Express 5.5/5.0/4.72/4.71
- GoldMine Email Center
- Windows Messaging 4.0
- Netscape Communicator 4.7/4.5/4.04
- AOL and Other email clients

1. 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.

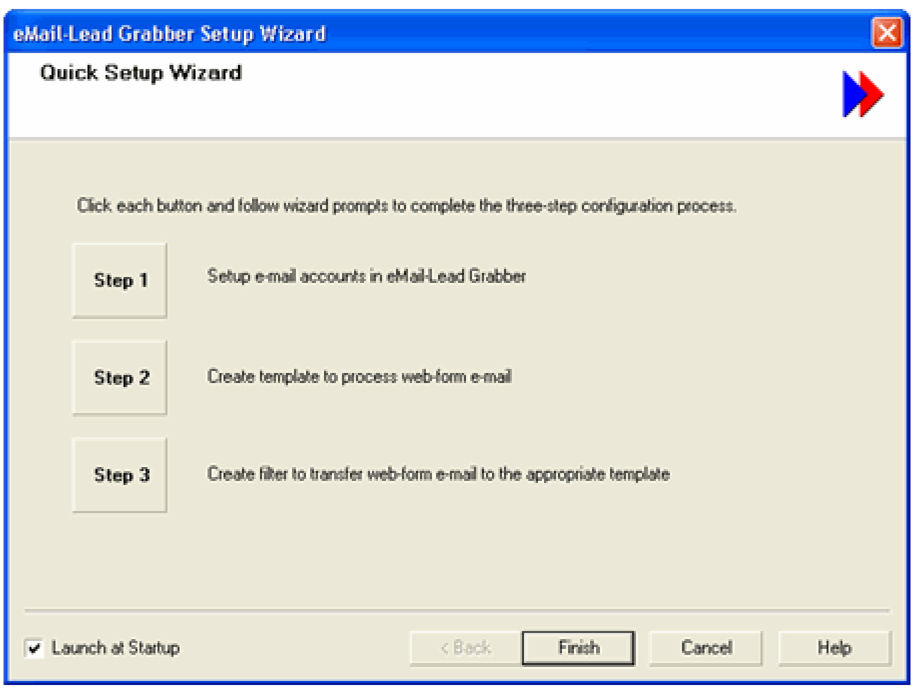

Figure 1: Setup Wizard

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 3 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 10 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 16 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.

2. eMail-Lead Grabber - Components

eMail-Lead Grabber contains three major components.

eMail-Lead Grabber GMSQL: 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.

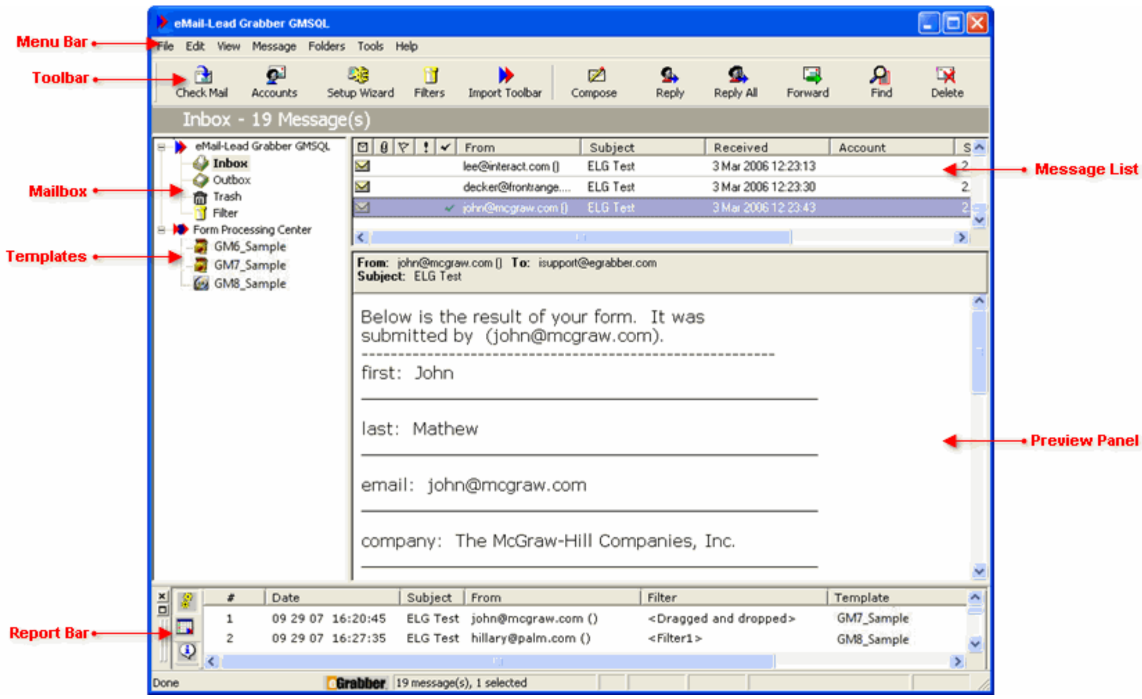

Figure 2: eMail-Lead Grabber Window

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.

3. 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.

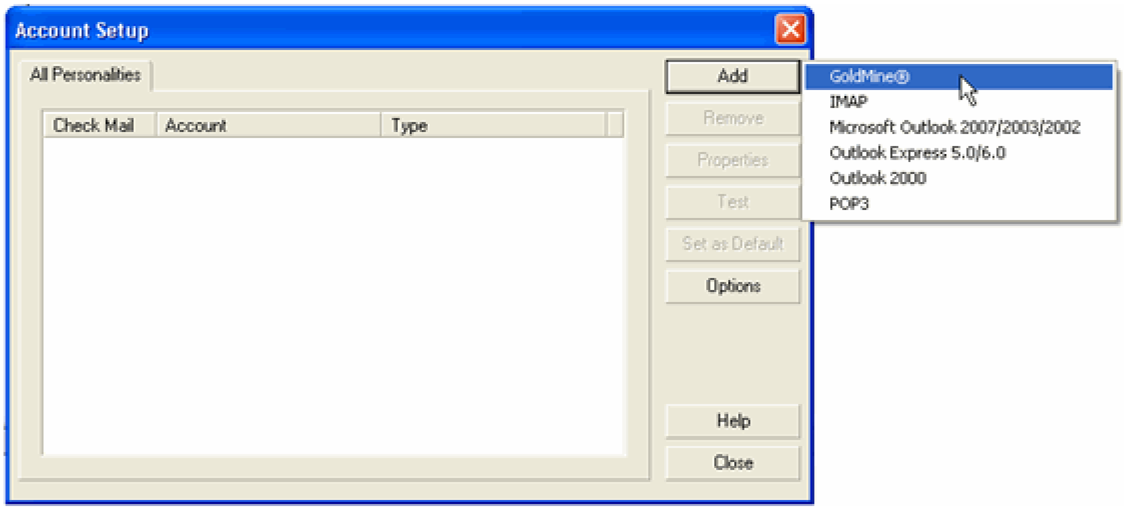

Figure 3: Account Setup

You can setup to download from the following email clients.

- GoldMine
- IMAP
- Microsoft Outlook
- Outlook Express
- POP3

3.1. Setup to download from GoldMine

To download the email from GoldMine,

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

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

Under **GoldMine Login Details**,

- Click **Get Values from GoldMine** to retrieve the following details automatically.
    - **Sys Dir:** Installation path of the GoldMine and the location of the License database file.
    - **Gold Dir:** Location of the Calendar database file that contains a record for each scheduled activity.
    - **Common Dir:** Location of the Contact database file that contains the main fields of contact records.
    - **User Name:** Login name of your GoldMine database.
- **Password:** Enter your GoldMine database password.

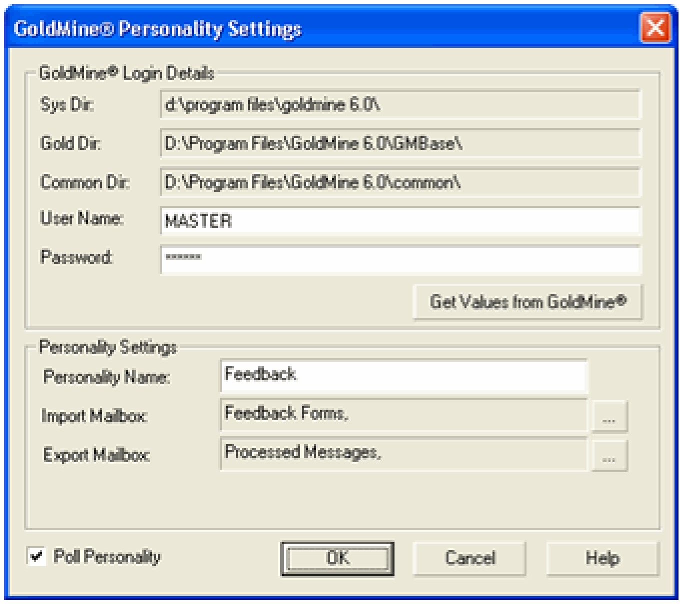

Figure 4: Personality Settings - GoldMine

Under **Personality Settings,**

- **Personality Name:** Enter a name for the email messages to be downloaded. This name is provided to differentiate specific type of messages when you receive different type of email forms. For Example, you can provide the personality name as "Feedback Forms" to download the email forms that contain feedbacks.
- **Import Mailbox:** Click the ... button to select the mailbox from which you want to download the email forms.
- **Export Mailbox:** Click the ... button to select the mailbox to which you want to save the processed email forms. After downloading email from GoldMine, the email forms are moved to the Export Mailbox. You can create a new folder to save the processed email forms.
- **Poll Personality:** Select this option to download the email from GoldMine to eMail-Lead Grabber Inbox automatically.

Click **OK.**

3.2. 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:

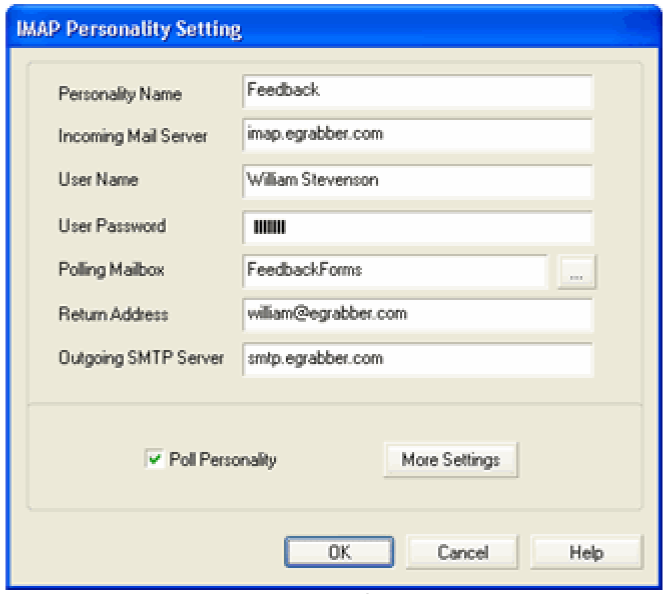

Figure 5: Personality Settings - IMAP

- **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:

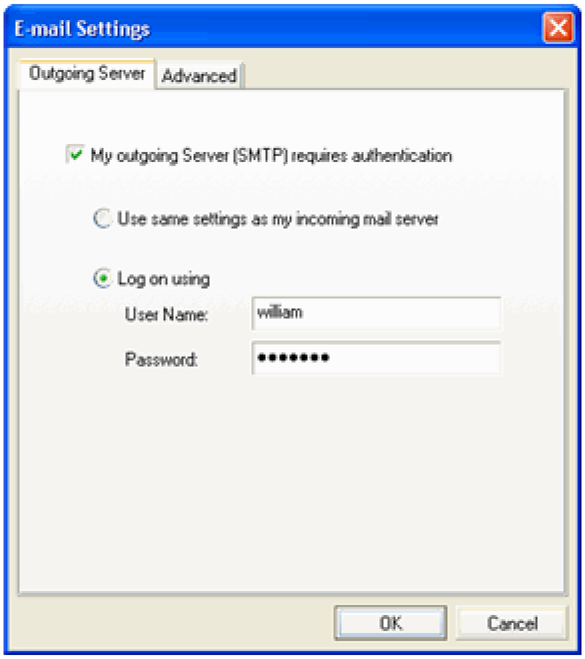

Figure 6: Email settings - Outgoing Server

Select **My Outgoing Server (SMTP) requires authentication** to ensure SMTP server authentication before sending email. 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:
  - **User Name:** Enter the user name of your SMTP server.
  - **Password:** Enter the password of your SMTP server.

Click **OK** to save the settings.

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

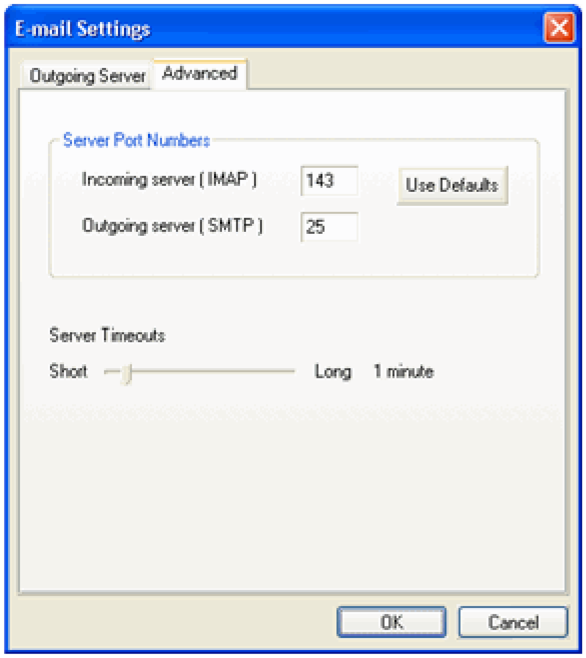

Figure 7: Email settings - Advanced

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.

3.3. Setup to download from Microsoft Outlook

To download the email from Microsoft Outlook,

In the **Account Setup** dialog box,

Click **Add** > **Outlook 2007** / **2003** / **2002** to download from Microsoft Outlook 2007 / 2003 / 2002.

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

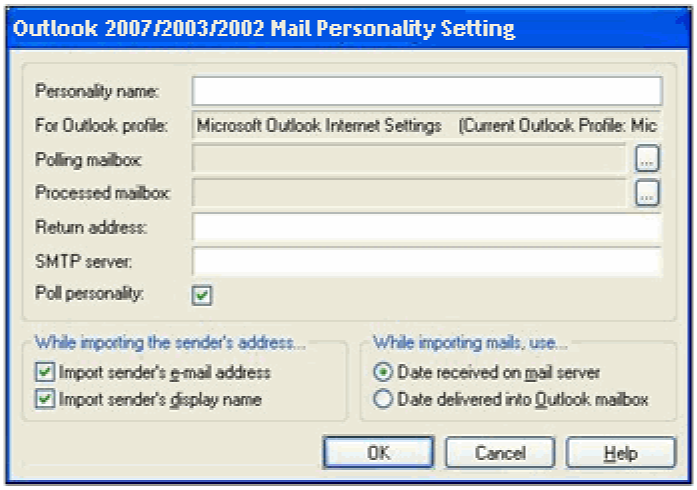

Figure 8: Personality Settings - Outlook 2007 / 2003 / 2002

- **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.**

Click **Add > Microsoft Outlook** to download from Microsoft Outlook 2000.

In the **Outlook Mail Personality Settings** dialog box, the details to be entered are similar to Outlook 2007 / 2003 / 2002, except the following:

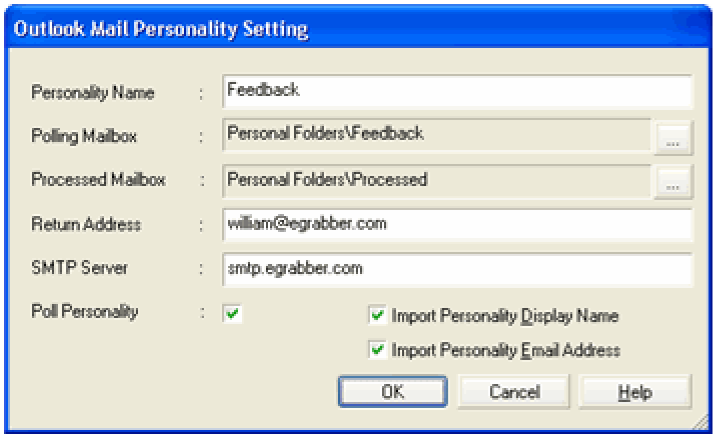

Figure 9: Personality Settings – Outlook 2000

- **Import Personality Display Name:** Select this option to display the sender's display name in the **From** column of eMail-Lead Grabber Inbox.
- **Import Personality Email Address:** Select this option to display the sender's email ID in the **From** column of eMail-Lead Grabber Inbox.

Click **OK.**

3.4. Setup to download from Outlook Express

To download the email from Outlook Express,

Click **Add > Outlook Express** in the Account Setup dialog box.

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

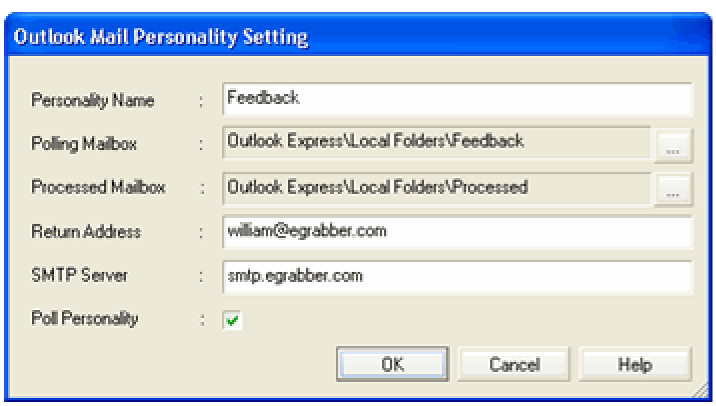

Figure 10: Personality Settings – Outlook Express

- **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 Express to eMail-Lead Grabber Inbox automatically.

Click **OK.**

When you download email from Outlook Express or Outlook, the email messages are deleted from the selected folder. So, it is recommended not to use your Inbox as the Polling mailbox.

Create a separate folder in your email client to save the email leads. You can set a filter to automatically move the email leads to the specific folder or drag and drop the email leads from your Inbox to the folder. You can use this folder as the Polling Mailbox.

3.5. 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:

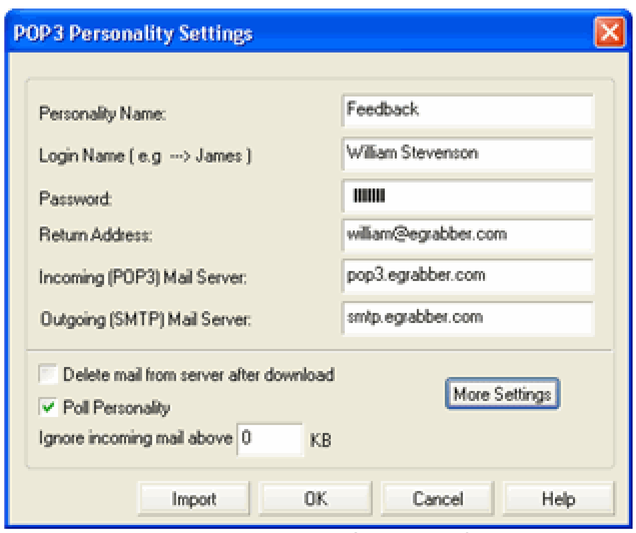

Figure 11: Personality Settings - POP3

- **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:

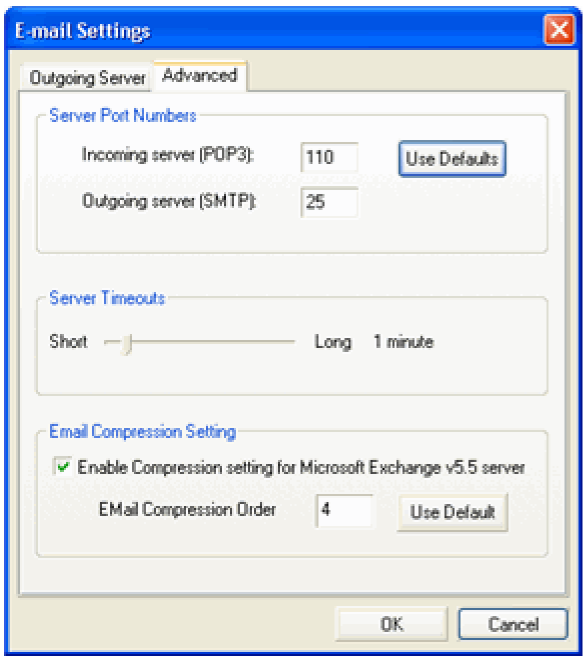

Figure 12: Email settings - Advanced

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 email 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.

3.6. Personality Settings

After you enter details and save the personality settings, the personality name is displayed in the **Account Setup** dialog box.

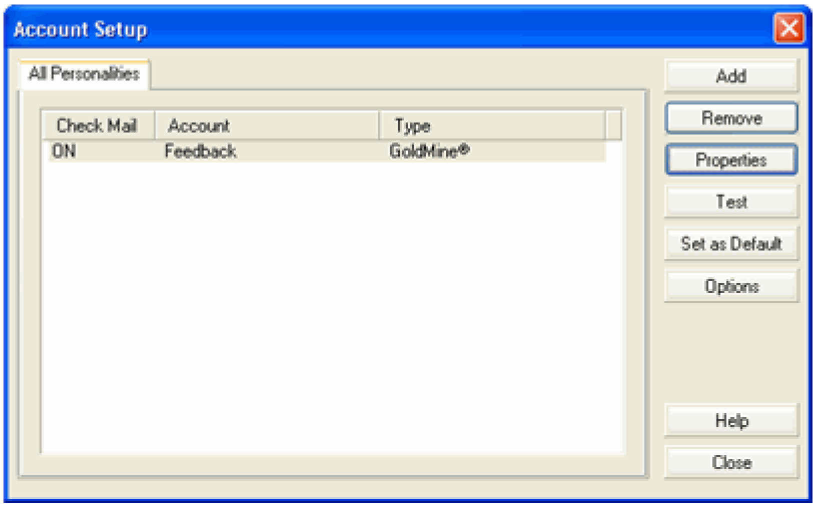

Figure 13: Account Setup for GoldMine

- Click **Remove** to delete the personality settings.
- Click **Properties** to edit the settings.
- Click **Test** to test the settings. The email forms are downloaded to the eMail-Lead Grabber Inbox.
- **Set as default:** Click here to make the selected personality name as your default account. When you reply to a message or send an auto-response, this account is used for sending the email.
- **Options:** Click here to open the **Miscellaneous Setup** dialog box. You can setup to check for email messages automatically. This option is explained in detail in the next section.

Click **Close.**

You can also make use of **Step 1** in the setup wizard to download the email messages. The wizard provides step-by-step instructions to complete the setup.

4. 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 GMSQL** 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:

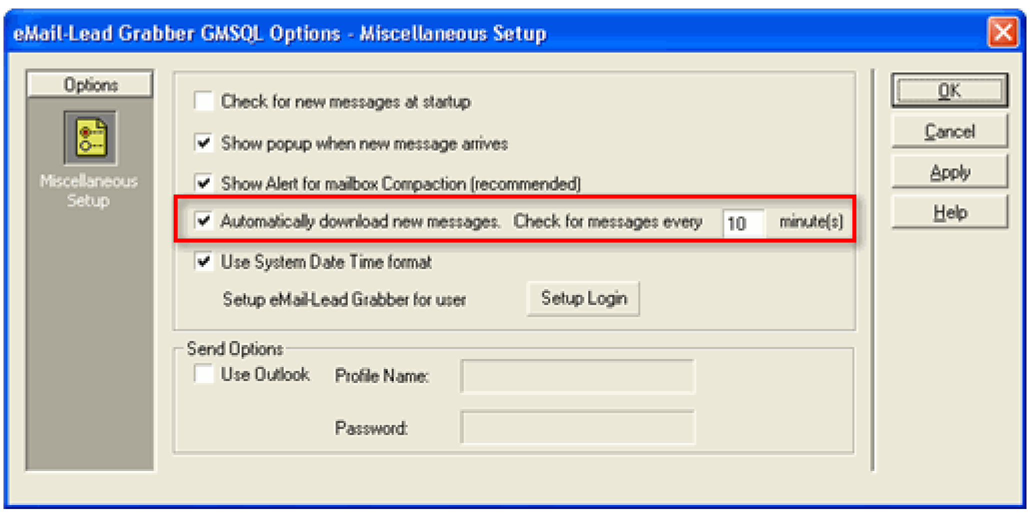

Figure 14: Miscellanous Setup

- **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, e**nter 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.

5. 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.

5.1. eMail-Lead Grabber - Menu bar

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

File Menu

Option	Function
Check Mail	Check for email and download new email into 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 email 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	Launch Dr. Mailbox to maintain your mailboxes.
Options	View the Options dialog box to provide mail settings for all your email 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.

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

5.2. eMail-Lead Grabber - Status bar

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

5.3. 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 15: 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.

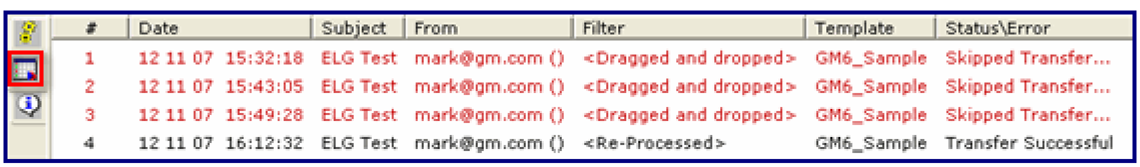

Figure 16: Process Status

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

Column	Description
Date	Date and time of process.
Subject	Subject of the processed email.
From	The sender's email ID of the processed email.
Filter	Name of the filter used for processing the email.
Template	Name of the template used for processing the email.
Status\Error	Displays the Transfer Status. If the transfer is successful, the message "Transfer Successful" is displayed. If the transfer fails then the error message is displayed with the reason for failure. If the transfer is cancelled then "Skipped Transfer" is displayed. If the email is processed and not transferred then "Process Successful" is displayed.

To save the processed details, right-click in the Process tab and select **Save Status Log**. To clear the text, righ-click and select **Delete** or **Delete All**.

Errors:

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

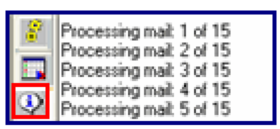

Figure 17: Errors tab

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

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

5.4. 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 23

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

6. 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 18.

Figure 18: 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 Express
- Outlook
- GoldMine
- Windows Messaging
- Netscape Communicator

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.

7. 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.

7.1. 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**.

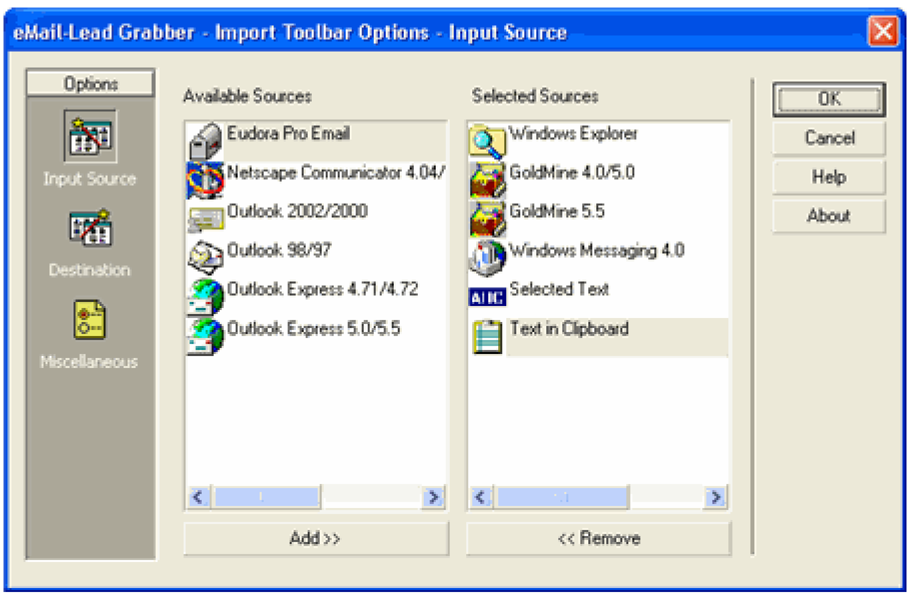

Figure 19: Add / Remove Source Applications

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.

7.2. 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**.

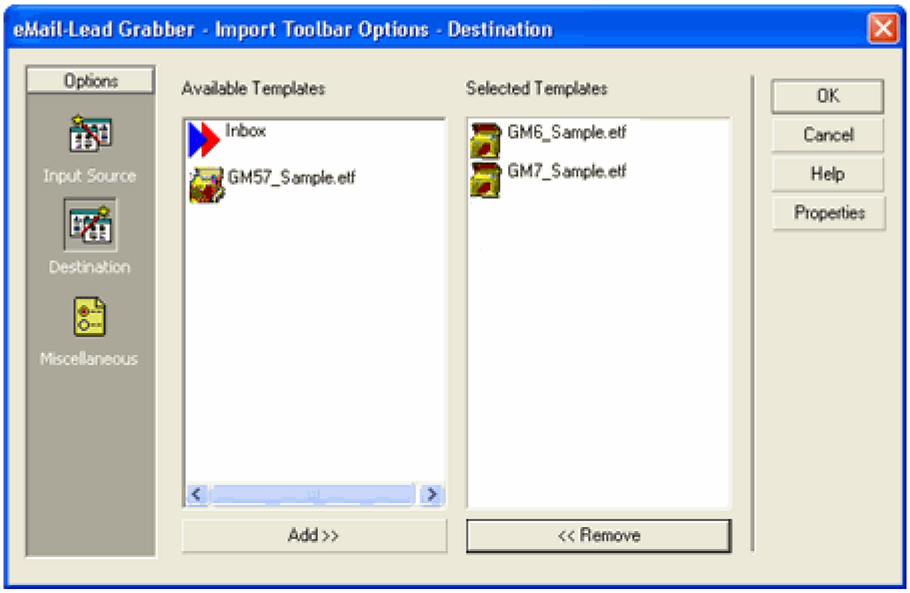

Figure 20: Add / Remove Templates

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.

7.3. 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.

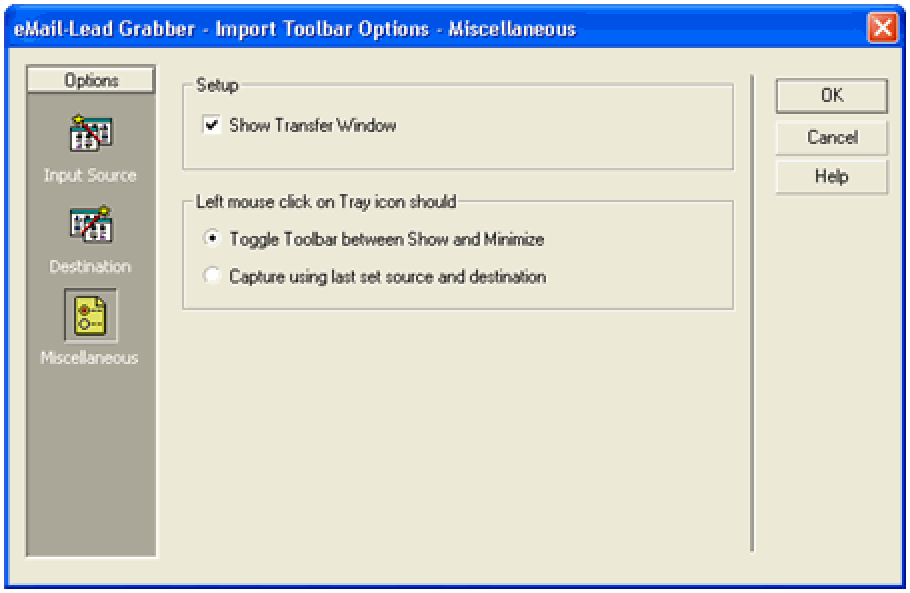

Figure 21: Import Toolbar - Miscellaneous Setup

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.

8. 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 bys 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.

9. 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.

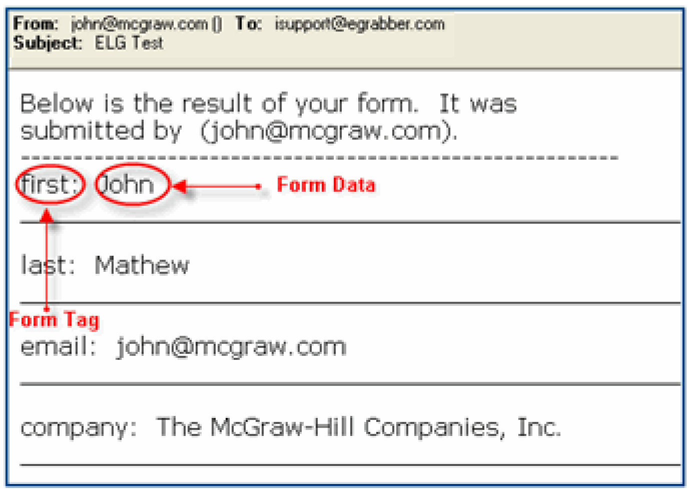

Figure 22: Example for an Email Form

You can create the templates in two methods:

1) Wizard Mode
2) Advanced Mode

10. 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 > Wizard Mode.** (Refer Figure 23)

[OR]

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

[OR]

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

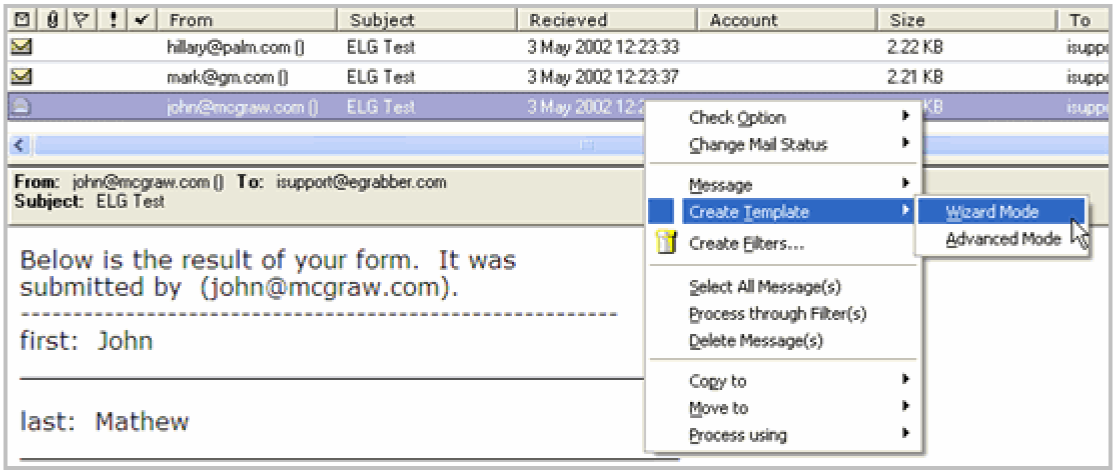

Figure 23: Create Template

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

10.1. Name the Template

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

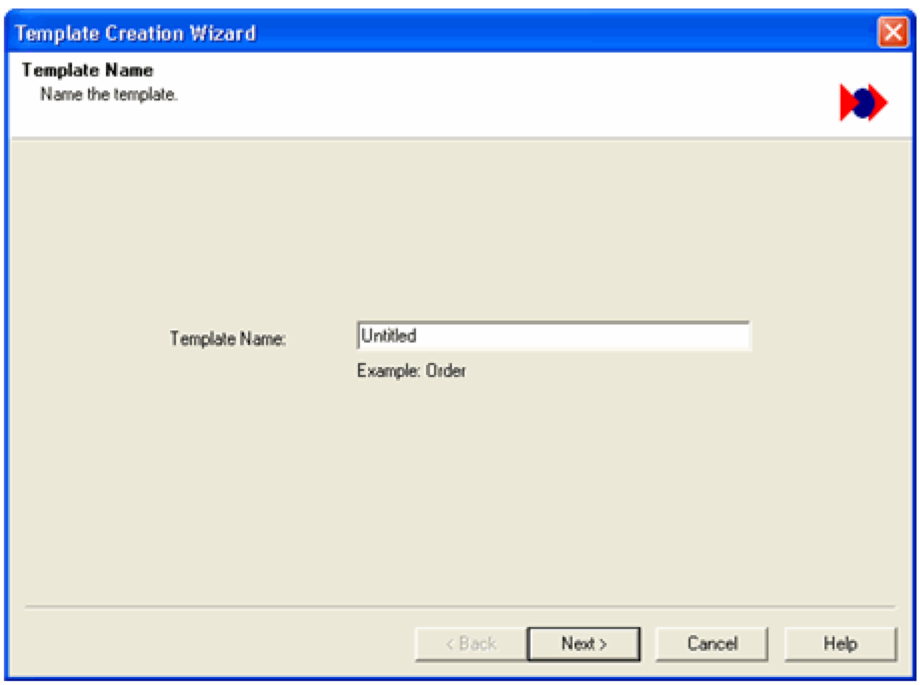

Figure 24: Enter Template Name

10.2. 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 22).

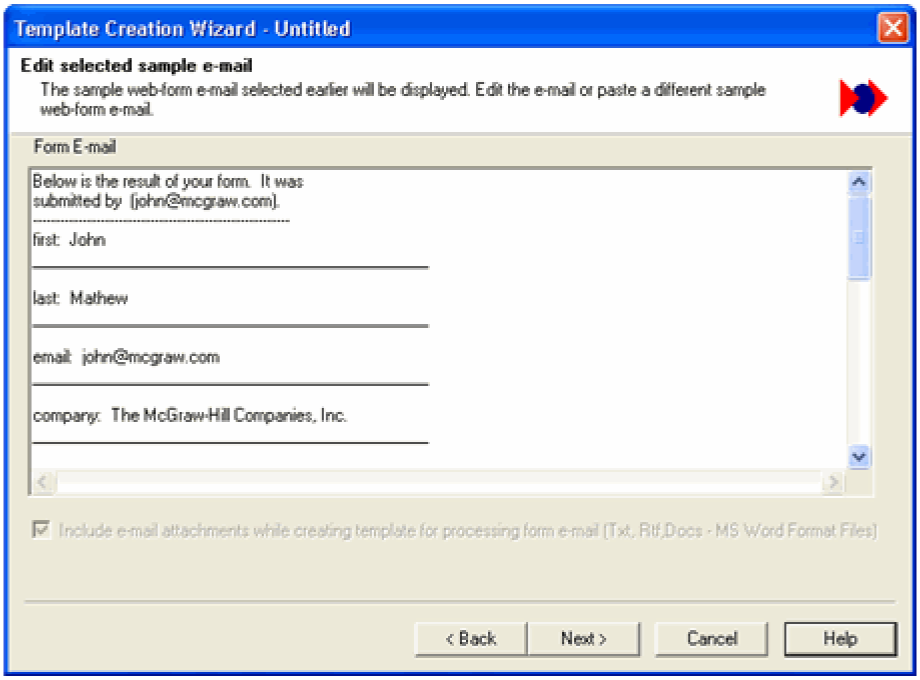

Figure 25: View and edit the sample Email

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

10.3. 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.

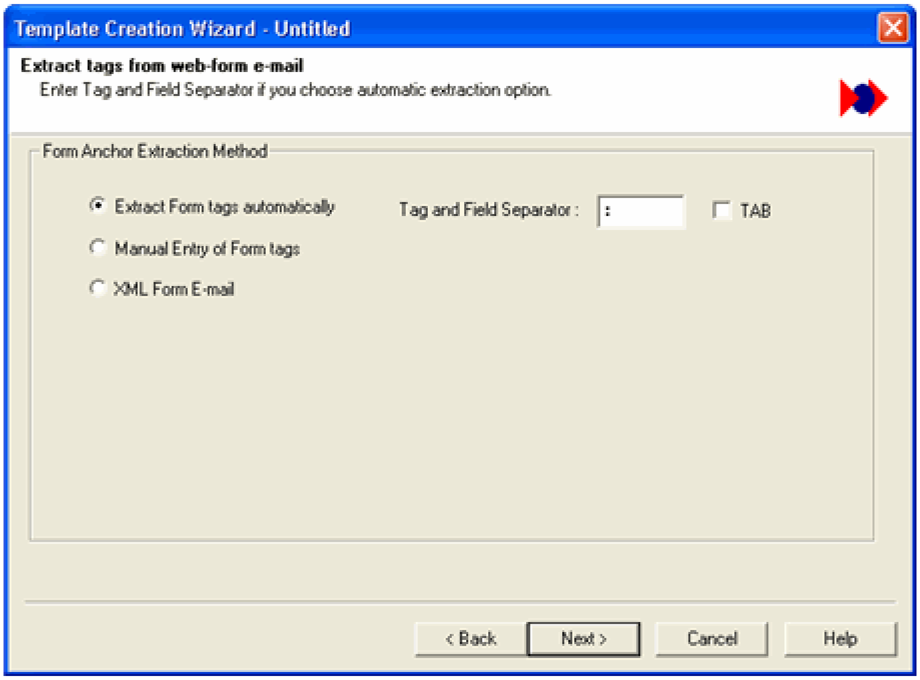

Figure 26: Extarct form tags

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

10.4. 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.

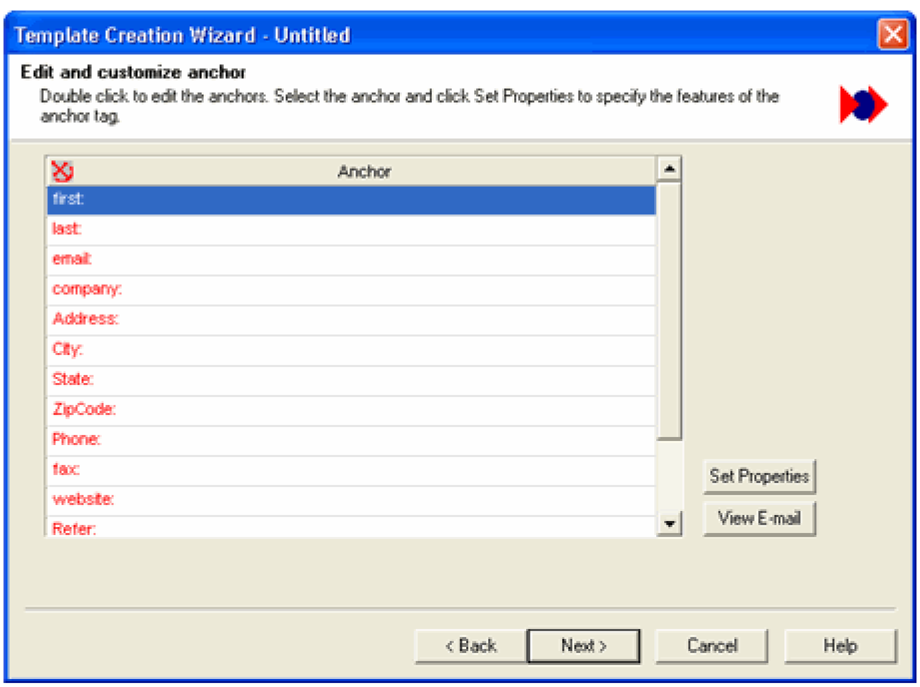

Figure 27: Edit Anchor Text

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**.

10.5. Select Destination Application

The next step is to select your destination application.

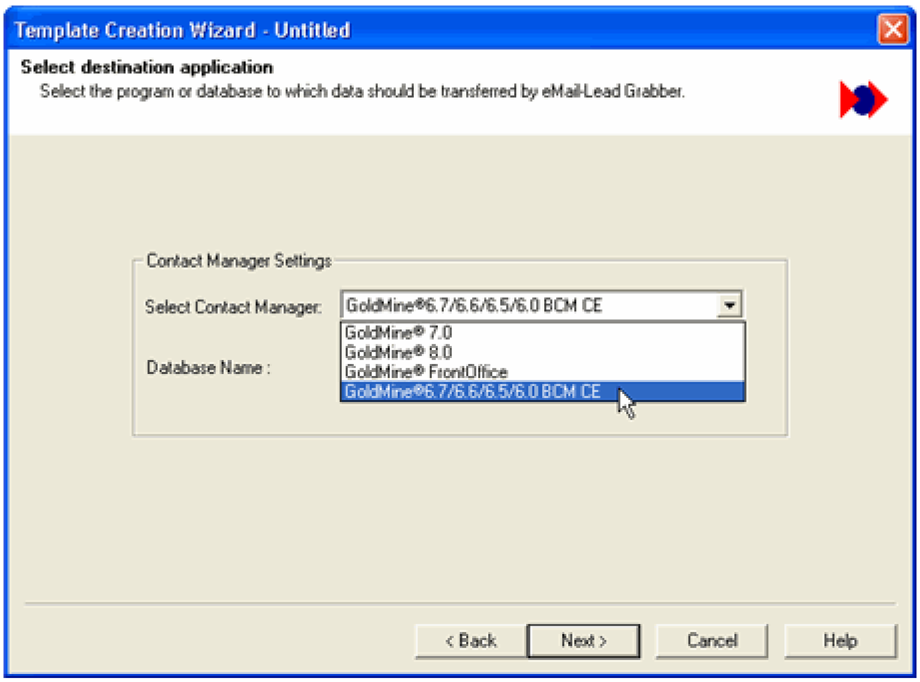

Figure 28: Select Destination Application

You can create template for the following versions of GoldMine.

- GoldMine 8.x / 7.5.x / 7.x / 6.x / 5.x

Select your version of GoldMine from the **Contact Manager** list and click **Next**.

10.6. Login to GoldMine

In the next step you need to login to the GoldMine database.

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

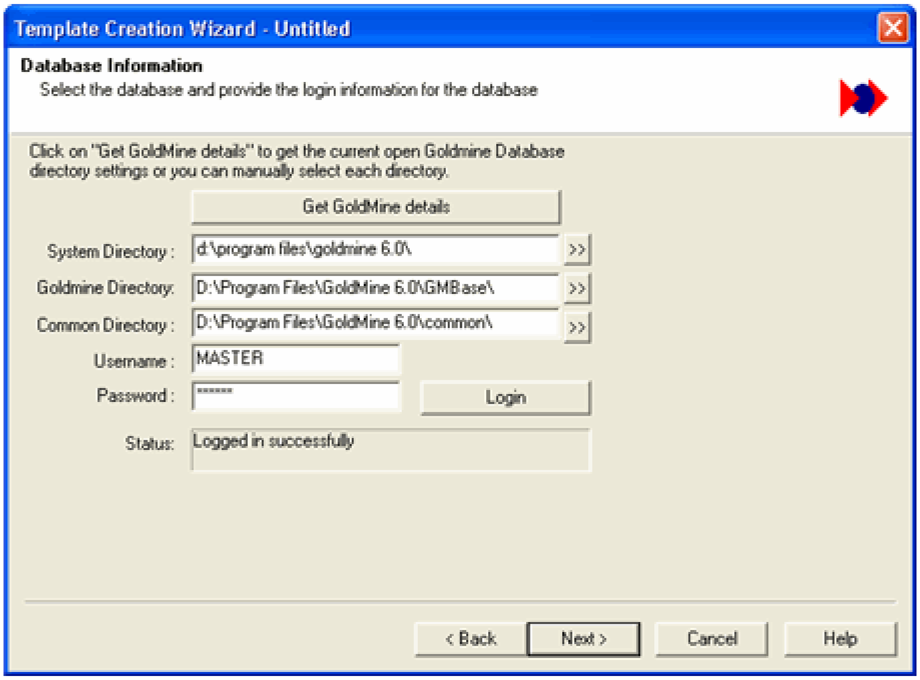

Figure 29: Login to GoldMine

Click **Get GoldMine Details** button.

The following login details are automatically retrieved from GoldMine database and displayed.

- **System Directory:** Installation path of the GoldMine and the location of the License database file.
- **GoldMine Directory:** Location of the Calendar database file that contains a record for each scheduled activity.
- **Common Directory:** Location of the Contact database file that contains the main fields of contact records.
- **UserName:** Login name of your GoldMine database.

Password: Enter the password to access your database.

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

The message "**Logged in Successfully**" is displayed.

Click **Next**.

10.7. Select Details

In the next step, you can select the details fields to which you can transfer data from your email form. All the fields from the details tab of your GoldMine database are displayed under **Select Detail Fields.**

Select the checkbox next to a detail field name. The detail field displayed is the name of the profile record entry, like Credit Card Number.

Click **Select All** to select all the fields displayed. All the field names are selected.

To deselect all the fields, click **Clear All**.

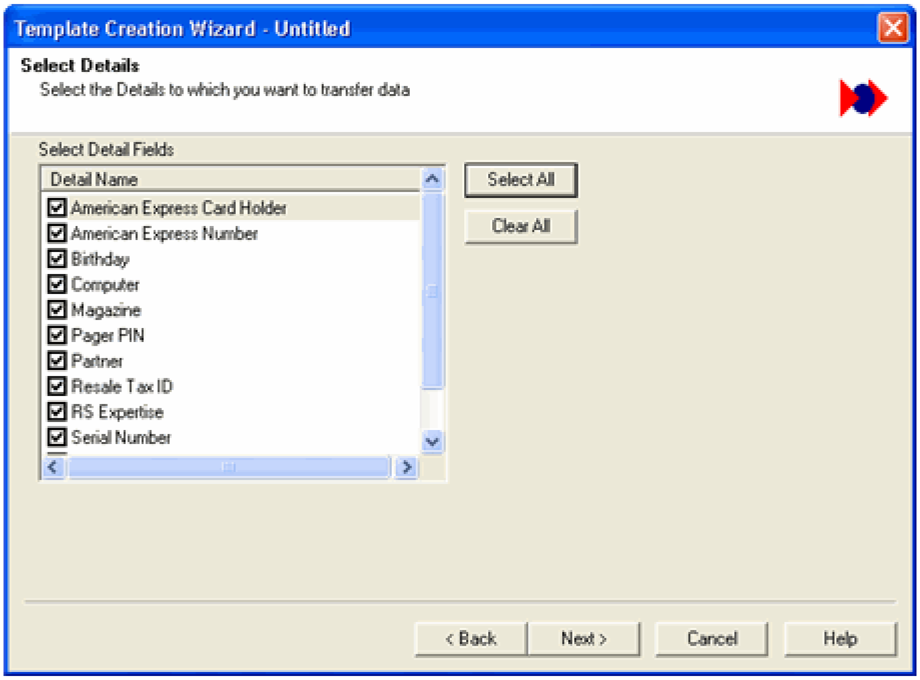

Figure 30: Select Details - GoldMine

You can select a maximum of 10 detail fields.

Click **Next**.

10.8. Select User Fields

In the next step, you can select the user fields to transfer data from the email.

All the user fields available in GoldMine are displayed under **Label.** The internal field name of the user fields is also displayed.

Select the checkbox next to a user field name.

Click **Select All** to select all the fields displayed. All the field names are selected.

To deselect all the fields, click **Clear All**.

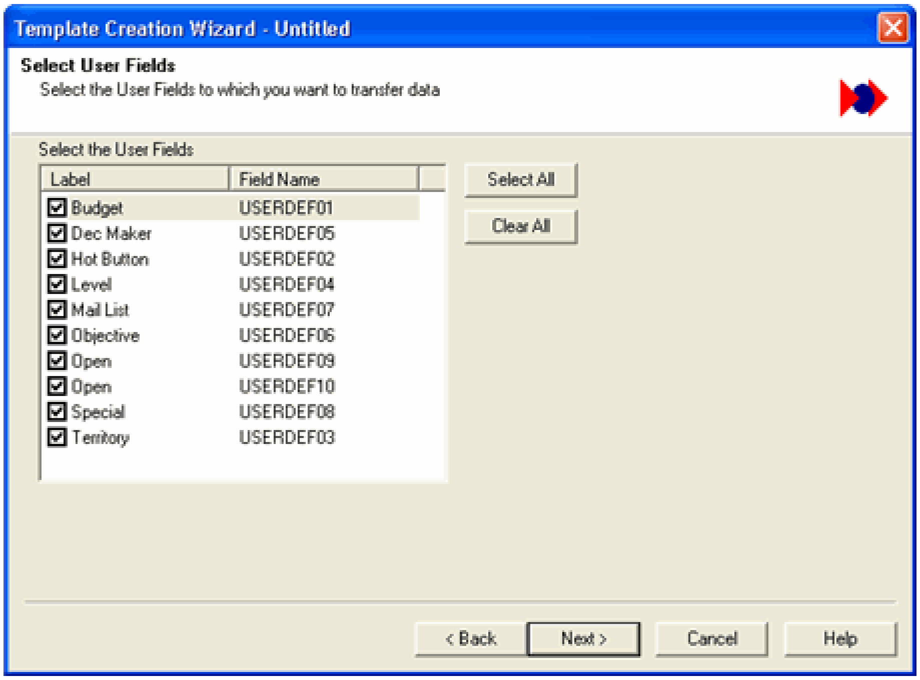

Figure 31: Select User Fields – GoldMine

You can select a maximum of 397 user fields.

Click **Next**.

10.9. Map Fields

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

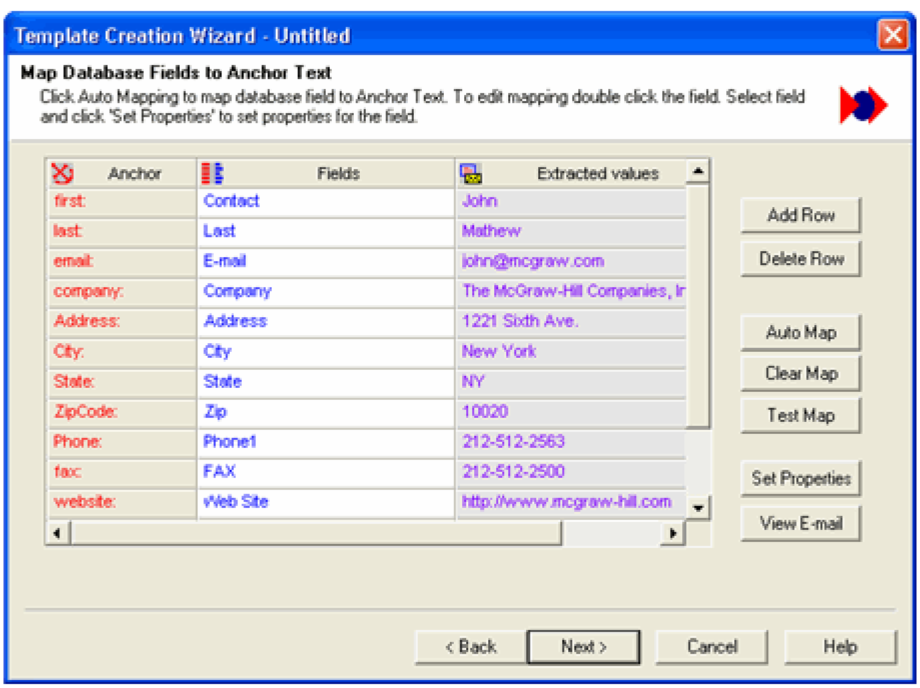

Figure 32: Map Fields

Double-click the **Fields** row and select the appropriate database field to map the field manaually.

Click **Auto Map** to map the fields automatically.

Click **Clear Map** to remove the mapping.

Click **Test Map** to view the extracted values from the email.

Select a field and click **Set Properties** to define properties for the selected field. Refer to Setup Field Properties for more details.

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

To add or remove a form tag, click **Add Row** or **Delete Row** respectively.

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

10.10. Map Email Header Information

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

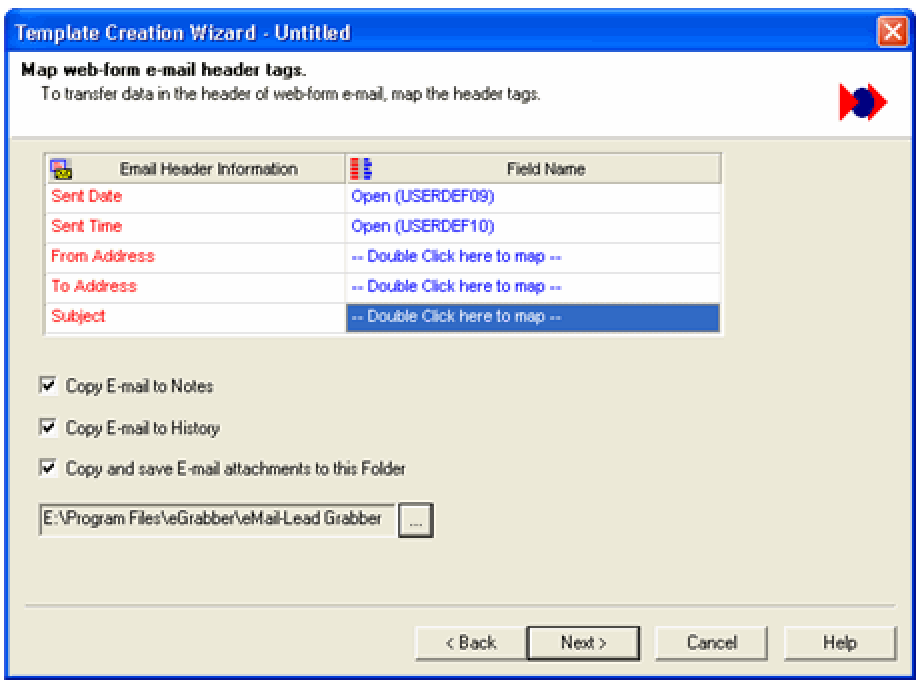

Figure 33: Map Email Header Information

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 tab.

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

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**.

10.11. Setup to check for duplicates

The next step is to setup to check for duplicates.

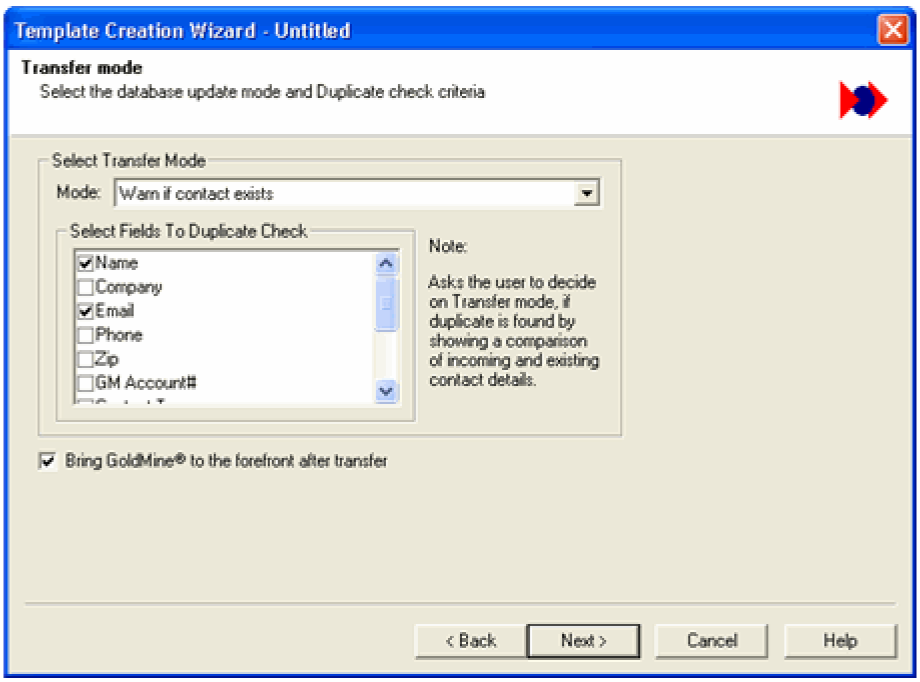

Figure 34: GoldMine - Check for Duplicates

Under **Select Transfer Mode,** select any one of the following options to handle duplicate records.

- Select **Always Add as New Contact** to add the duplicate as a new contact to your application.
- Select **Warn if contact exists** to get a warning message when you transfer a duplicate contact. During the transfer of a duplicate contact, a Validate Duplicates dialog box appears to handle the duplicate records. Refer to
- Select **Always update first duplicate** 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 **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 **Only Update existing contact** to update existing contacts only. This option checks for a duplicate record and if no match is found, then the transfer process is cancelled. The contact is not added as a new record.
- Select **Cancel if contact exists** to cancel transferring the duplicate record.

When you select any of the above options except **Always Add as New Contact,** the fields under **Select Fields To Duplicate Check** are made available.

Select a single field or multiple fields to check for duplicate values.

Bring GoldMine to the forefront after transfer: Select this option to display the contact record after the transfer process.

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

Validate Duplicates

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

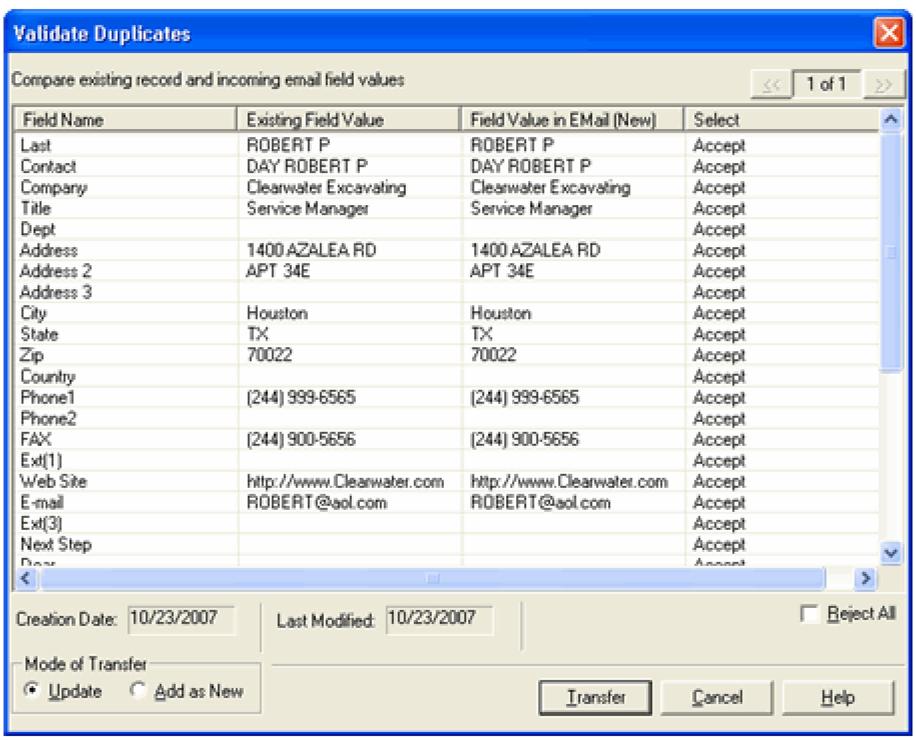

Figure 35: Validate Duplicates

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**.

10.12. Schedule Activity

The next step is to schedule activities for the transferred contact records.

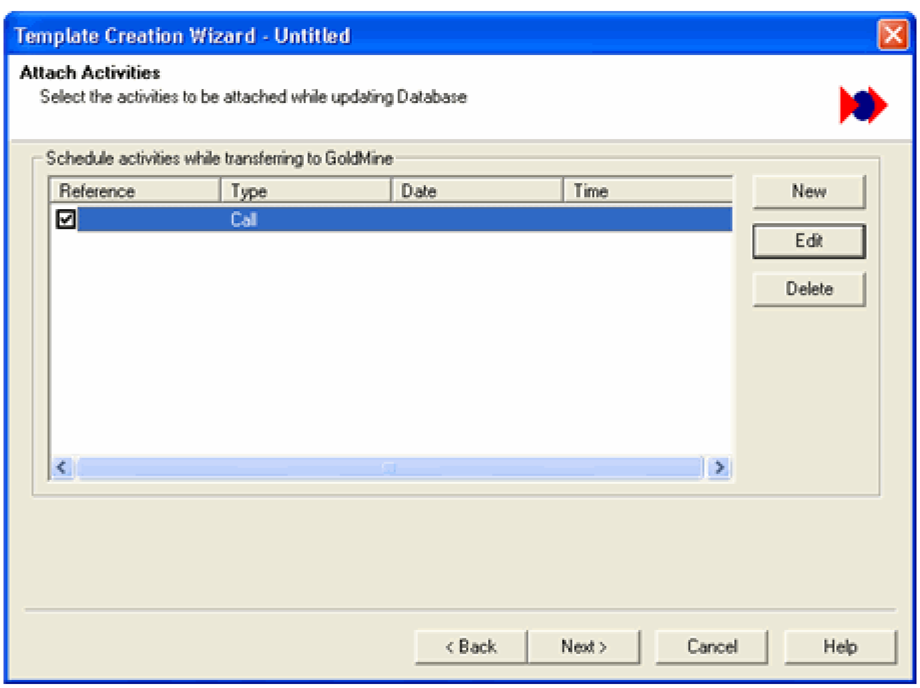

Figure 36: Attach Activities to GoldMine

Click **New and select an activity to be scheduled from the menu:**

- Call
- Next Action
- Appointment
- Literature Request
- Forecasted Sale
- Other Action
- Event
- To-do

Setup to Schedule Call, Next Action, Appointment, Other Action, Event

The process is similar for the following activities:

- Call
- Next action
- Appointment
- Other action
- Event

When you select any of the above activities, a Schedule window is displayed. The Schedule window consists of **Detail** and **Users** tabs, and you can set up the following parameters:

Detail Tab

When scheduling a Call, Next Action, Appointment, Event, or Other Action, the Schedule window displays the **Detail** tab by default.

In the **Detail** tab, you can setup the following options:

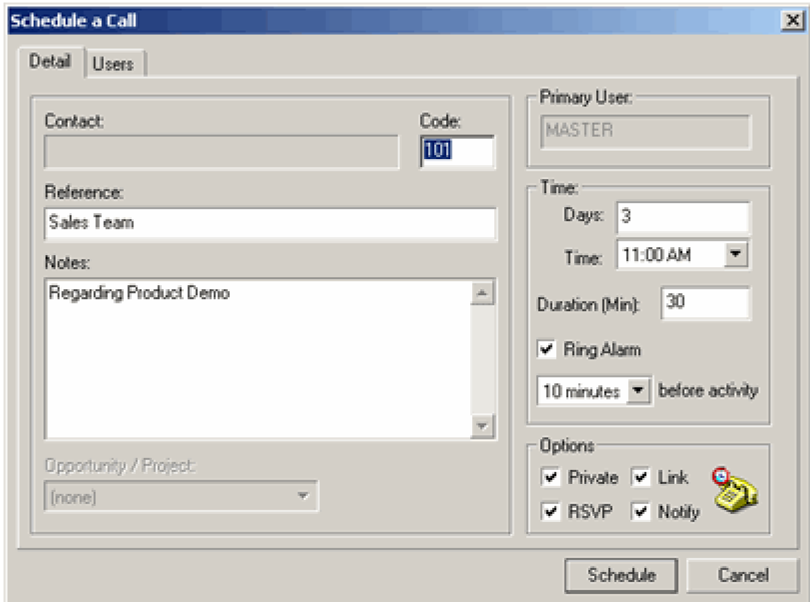

Figure 37: Schedule a Call in GoldMine - Detail tab

- **Contact:** While transferring, name of the contact being transferred is automatically displayed here.
- **Code**: Enter the Job code, or other identifier, to categorize the activity.
- **Reference**: Enter brief description about the activity.
- **Notes**: Enter any additional text related to the activity.
- **Opportunity/Project:** This option is currently not available.
- **Primary User:** After transfer, the GoldMine user name to which activity is to be scheduled is displayed here. The user name is displayed based on the settings in the Users tab.
- **Days:** Enter the number of days counting from the present day to perform the activity. For example if you type 30 days then the activity is executed on the 30th day counting from the present day.
- **Time:** Enter a time or click the arrow to select time. The Time selector shows the time slots with a difference of 30 minutes.
- **Duration:** Enter the time duration of the activity. For example, if your calls last for 45 minutes, then type 45 in the Duration box.
- **Ring Alarm:** Set an alarm to remind you of the 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.
- **Private:** Select this option to make your activity private. Now the activity is available only to the selected user.

> After transfer, other users can view information about the activity type, date, and user in the Pending tab of the contact records. The Reference column indicates that the user designated to the activity is private. In the Calendar, other users can view the activity, but cannot view the other details.

- **RSVP:** Select this option to notify when the assigned user completes the scheduled activity.

- **Link:** Select this option to attach the activity to the contact record.
- **Notify:** Select this option to send an email message to user for whom the activity is scheduled, or when a scheduled activity is changed.
- Click **Schedule** to create the activity.

After transfer, activities are automatically scheduled for the contacts transferred to your database. You can view the newly scheduled activity in the **Pending** tab of the transferred contact.

Users tab

In the **Users** tab, you can assign the scheduled activity to the selected users or user groups.

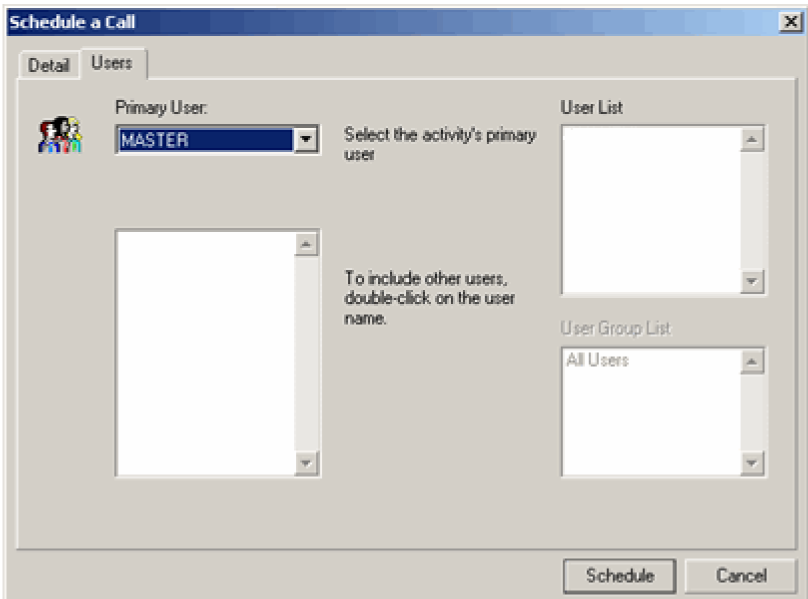

Figure 38: Schedule a Call in GoldMine - Users tab

- **Primary User:** Select the primary user from the list.
- **User List:** Displays the list of all the users. To select a user, double-click the user name. The user name is moved to the list under the selected distribution list.
- **User Group List:** Displays all the user groups.
- Click **Schedule** to assign the scheduled activity to the selected users.

Setup to Schedule Forecasted Sale

A forecasted sale is an estimate to record the anticipated close date of a pending sale with a contact. This is different from other activities. You can enter the sale amount, probability of the sales etc., in this activity.

In the Schedule a Forecasted Sale dialog box, you can setup the following options:

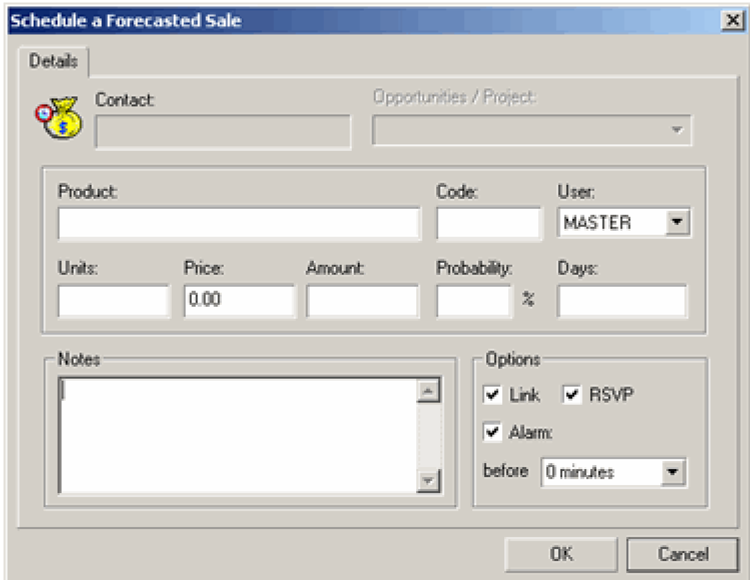

Figure 39: Schedule Forecasted Sale in GoldMine

- **Contact:** While transferring, name of the contact being transferred is automatically displayed here.
- **Opportunity/Project:** This option is currently not available.
- **Product:** Enter the name of the product or service that the prospect is expected to purchase.
- **Code:** Enter the Job code, or other identifier, to categorize the activity.
- **User:** Select the user to assign the activity.
- **Units:** Enter the number of units of product that the prospect is expected to purchase.
- **Price:** Enter the cost of each unit.
- **Amount:** The total cost is automatically calculated (Units * Price) and displayed.
- **Probability:** Enter the percentage of likelihood of the contact making this purchase.
- **Days:** Enter the number of days counting from the present day to perform the activity. For example, if you type 30 days then the activity is executed on the 30th day counting from the present day.
- **Notes:** Enter any additional text related to the activity.
- **Link:** Select this option to attach the activity to the contact record.
- **RSVP:** Select this option to notify when the assigned user completes the scheduled activity.
- **Alarm:** Set an alarm to remind you of the 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.
- Click **Schedule** to create the activity.

After transfer, activities are automatically scheduled for the contacts transferred to your database. You can view the newly scheduled activity in **Pending** tab of the transferred contact.

Setup to Schedule Literature Request

If your company has brochures, price lists, and other types of mass-printed documentation, you can schedule an activity to send this literature to one or more contacts in your GoldMine database.

You can schedule a literature request to a user, reminding them to send literature and a cover letters to contacts.

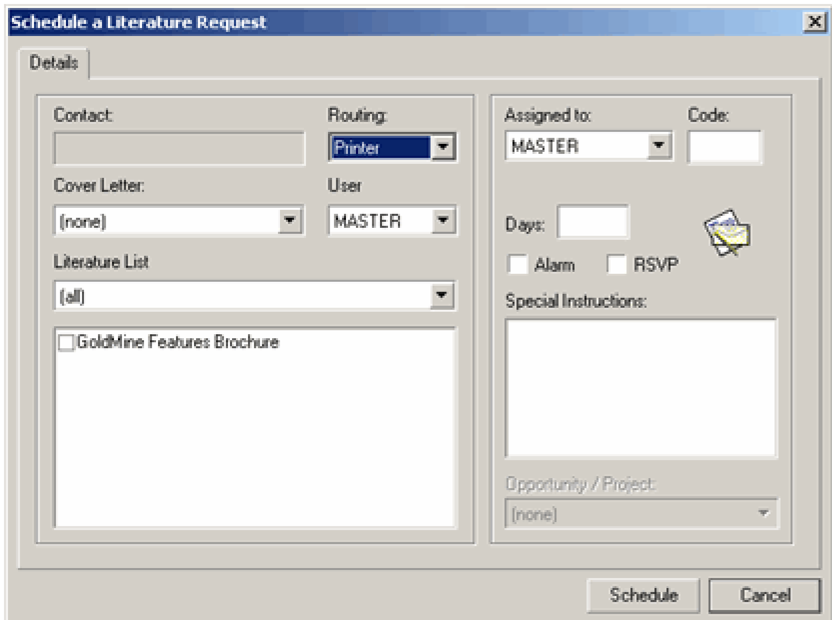

Figure 40: Schedule Literature Request in GoldMine

- **Contact:** While transferring, name of the contact being transferred is automatically displayed here.
- **Routing:** Select the mode of delivery from the following:
  - Printer
  - FAX
- **Cover Letter:** Select a form letter to be sent as a cover letter along with the literature. The templates displayed in this list are based on the selected user.
- **User:** Select the user name to view the corresponding document templates in the Cover Letter list.
- **Literature List:** Select from the list of literature options created in the Literature Fulfillment Center. The items included in the list are displayed in the text window below.
- **Assigned to:** Select the user name to assign the activity.
- **Code:** Enter the Job code, or other identifier, to categorize the activity.
- **Days:** Enter the number of days counting from the present day to perform the activity. For example, if you type 30 days then the activity is executed on the 30^{th} day counting from the present day.
- **Alarm:** Set an alarm to remind you of the 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.

- **RSVP:** Select this option to notify when the assigned user completes the scheduled activity.
- **Special Instructions:** Enter special instructions required to fulfill the request, such as packing or shipping instructions.
- **Opportunity/Project:** This option is currently not available.
- Click **Schedule** to create the activity.

After transfer, activities are automatically scheduled for the contacts transferred to your database. You can view the newly scheduled activity in **Pending** tab of the transferred contact.

Setup to Schedule To-Do list

You can schedule activities without specific deadline in a To-Do list.

In the **Schedule a To-do** dialog box, you can setup the following options:

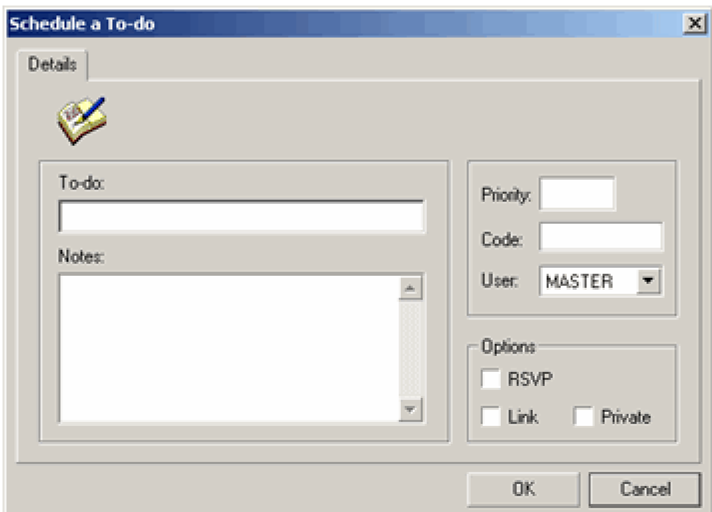

Figure 41: Schedule To-Do in GoldMine

- **To-do:** Enter a brief description for the to-do activity.
- **Notes:** Enter any additional text related to the activity.
- **Priority:** Enter a number from 1-9 to setup priority level for the activity.
- **Code:** Enter the Job code, or other identifier, to categorize the activity.
- **User:** Select the primary user whose calendar will be updated after scheduling the To-Do list. To display a list of available GoldMine users, click on the arrow to the right of the field. . Only those users available in your database are displayed here.
- **RSVP:** Select this option to notify when the assigned user completes the scheduled activity.
- **Link:** Select this option to attach the activity to the contact record.
- **Private:** Select this option to make your activity private. Now the activity is available only to the selected user.

After transfer, other users can view information about the activity type, date, and user in the Pending tab of the contact records. The Reference column indicates that the user designated to the activity is private. In the Calendar, other users can view the activity, but cannot view the other details.

Click **Schedule** to create the activity.

After transfer, activities are automatically scheduled for the contacts transferred to your database. You can view the newly scheduled activity in **Pending** tab of the transferred contact.

The created activities are displayed under **Schedule activities while transferring to GoldMine.**

To Edit Activity,

- Select the Activity displayed and click **Edit.**
- Make the required changes in the Activity Settings and click **OK.**

To Delete Activity,

- Select the Activity displayed and click **Delete**.
- Click **OK.**

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

10.13. User Settings while updating GoldMine

In the next step, you can setup the options while updating existing records as follows:

Do not Update User Fields, if incoming data is empty: Select this option so that the data in GoldMine User Field is not modified when:

- You have selected to update an existing record.
- Existing record contains data in the user fields.
- Incoming matching record does not contain user field data.

GoldMine performance setting: Set an optimum level for GoldMine driver's performance. You can select any value between 1 and 15.

Delimiter for fields mapped to Notes section:

If you have mapped more than one form tag to the **Notes** section, you can separate the data by a TAB, a Line or any custom character.

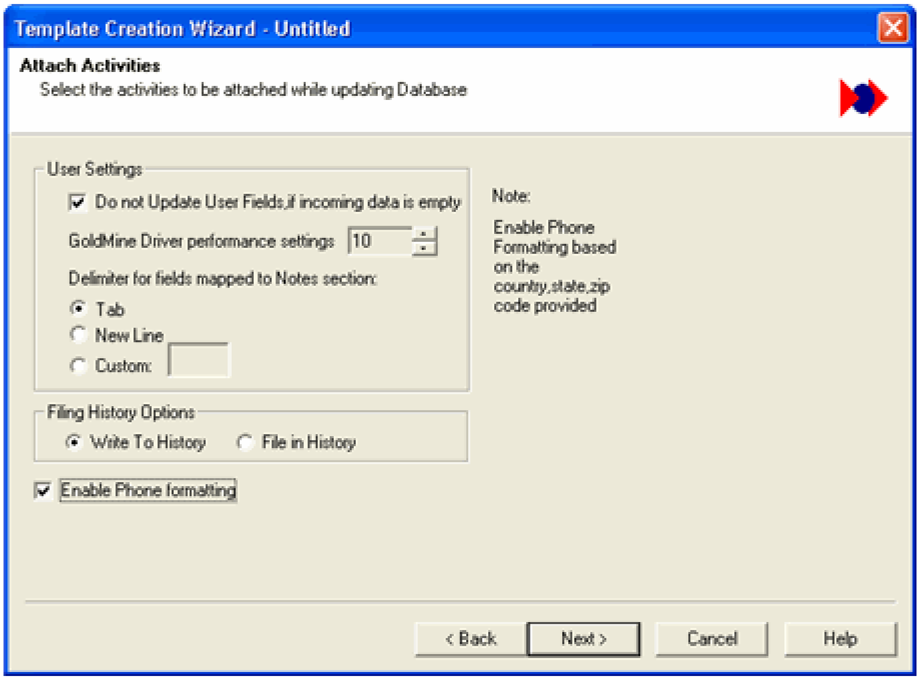

Figure 42: User Settings for GoldMine

Under **Filing History Options,** select the method to save data in the History tab of your GoldMine database.

- **Write to History:** Select this option to save an entry in the History tab.
- **File in History:** Select this option to file the email message in the GoldMine Email Center.

Select **Enable Phone formatting** to save the phone numbers in standard US format.

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

10.14. Setup to attach Process

In the next step, you can attach process to the transferred contact.

Select **Attach Process after transferring records to GoldMine** to enable the processes.

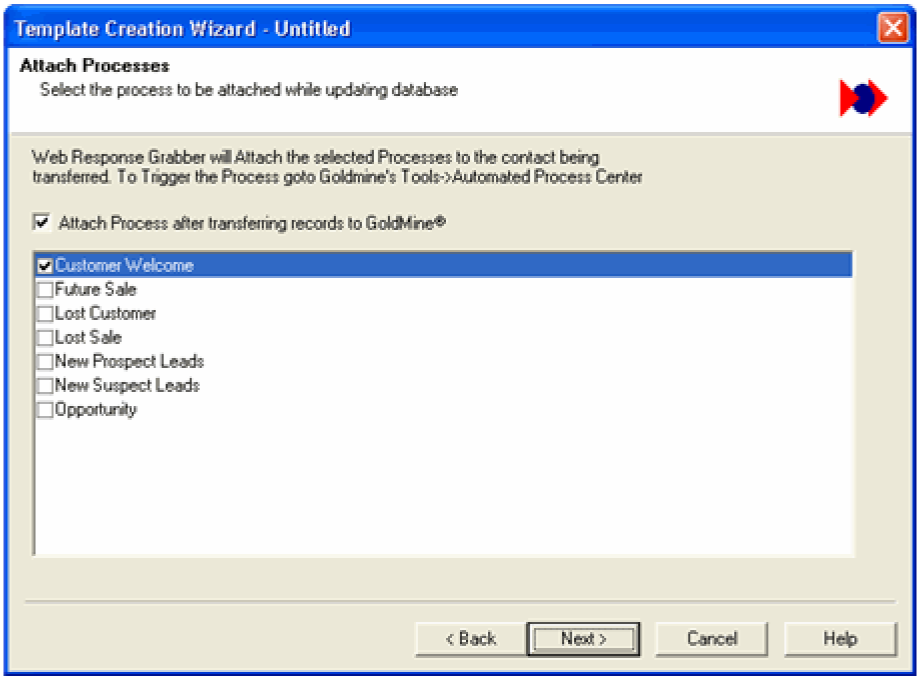

Figure 43: Attach Process to GoldMine

All the automated processes created in your database are displayed. Select the checkbox that appears next to the automated process.

> If you have not created any automated processes in your database, then no process is displayed in this dialog box.

While transferring a contact, the process is attached to the **Tracks** tab in GoldMine. If you are in the **Scan Continuously** mode, then the process is executed automatically and is attached to the **Pending** Tab of the transferred Contact.

Click **Next**.

The next step is to save the email contents to a text file and attach the file to the destination.

10.15. Attach Email Contents

You can save the email contents in a text file.

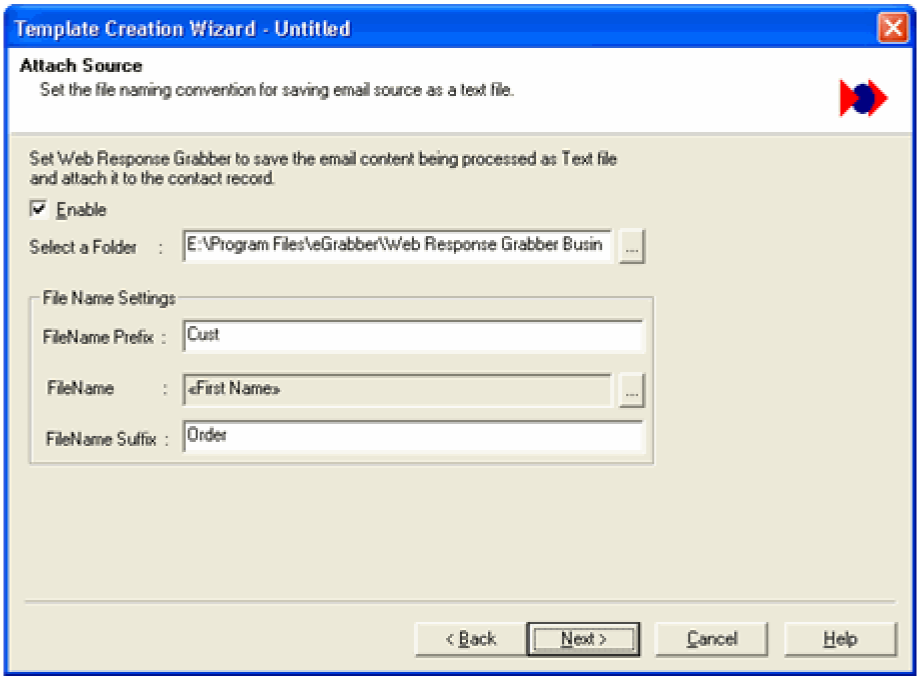

Figure 44: Save the email contents

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)

Is 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 email, the attachment name gets incremented and is saved as Cust-Wiliam-Order1.txt, Cust-Wiliam-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.**

10.16. Keyword Search

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

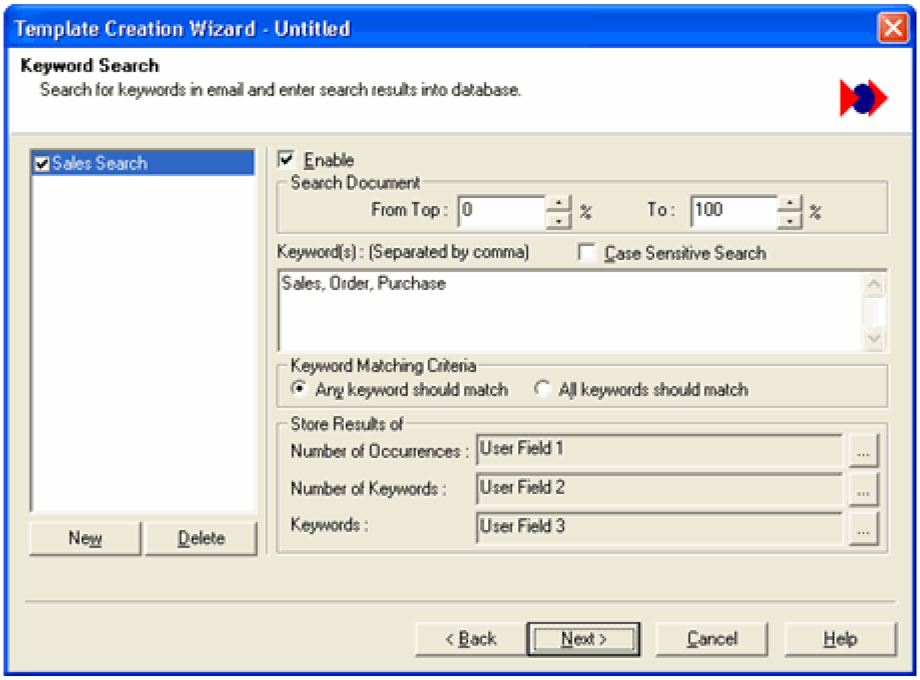

Figure 45: Keyword Search

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

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

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

Under Seacrh 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 seacrhed 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**.

10.17. Select Mail Merge Template

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

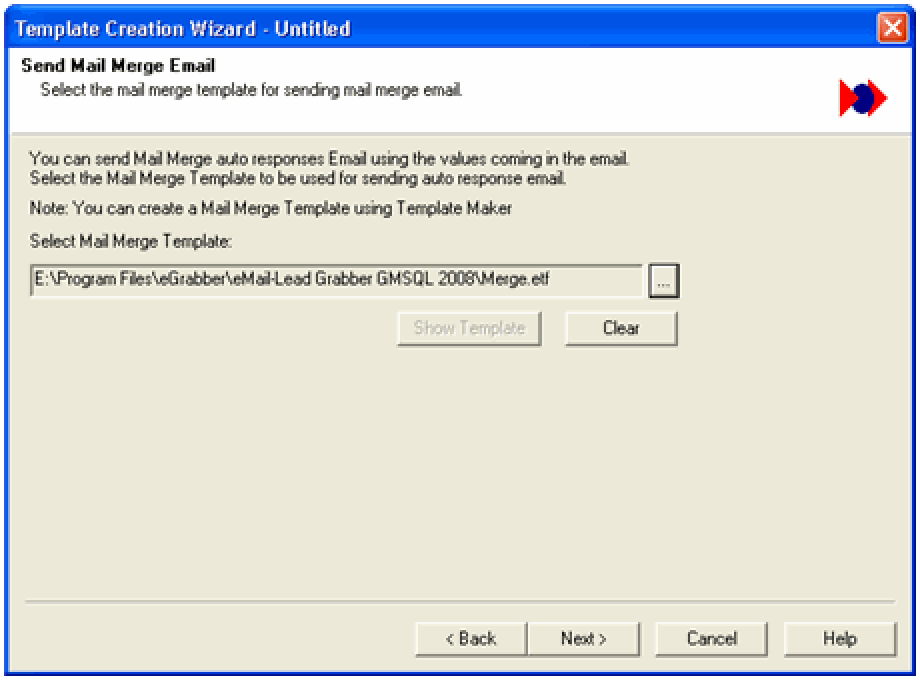

Figure 46: Select Mail Merge Template

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

Refer to Chapter 12 for more details on Mail Merge Template.

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

10.18. Assign Pre-defined Values

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

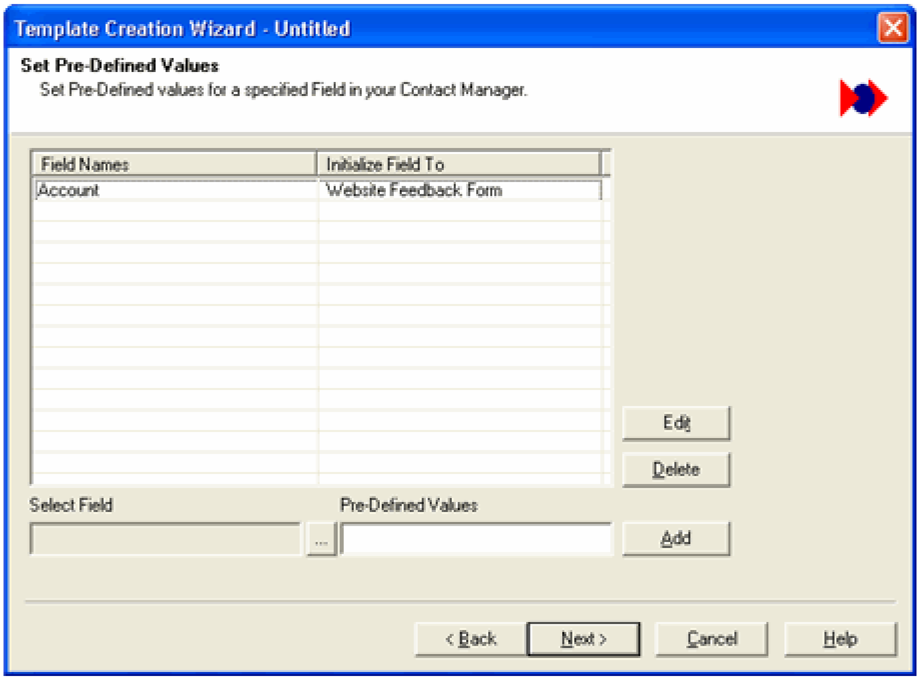

Figure 47: Assign default values

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**.

10.19. Save the Template

The next step is to save the template.

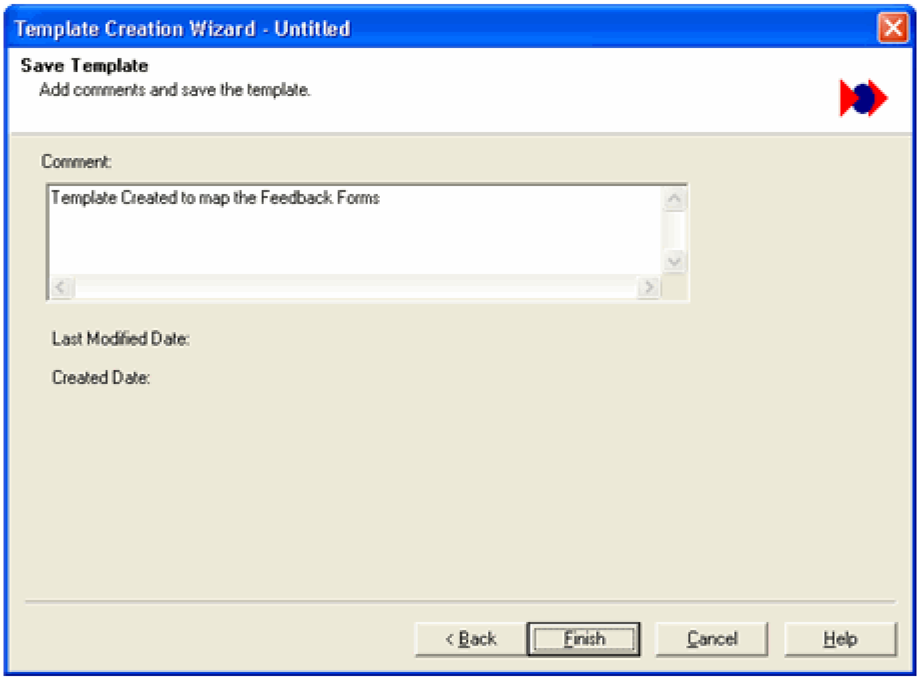

Figure 48: Save the template

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.

11. 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 50)

  [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.

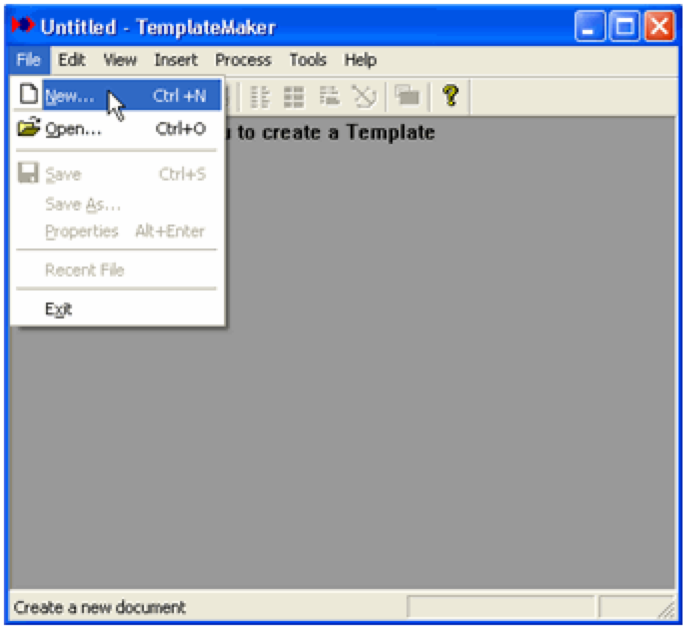

Figure 49: Create Template from TemplateMaker

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

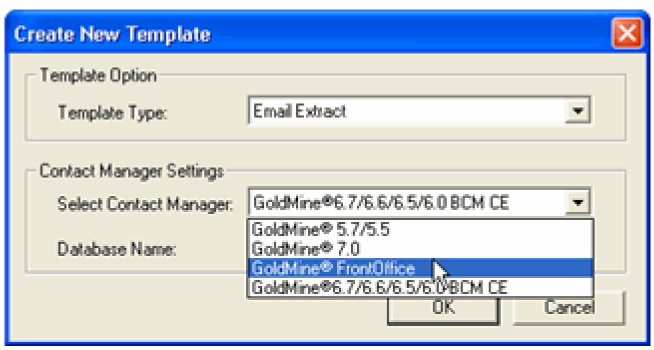

Figure 50: Create Template

From the **Select Contact Manager** list, select your destination application and click **OK.** You need to setup the link options.

The settings are similar to the options explained in **Chapter 10** 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 10.

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.

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

The following section explains the steps to map the fields.

11.1. Map Fields

After you have setup the link options, 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 22) 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 51.

The fields available in the selected GoldMine database are displayed. Select the field to which the Form Data is to be transferred.

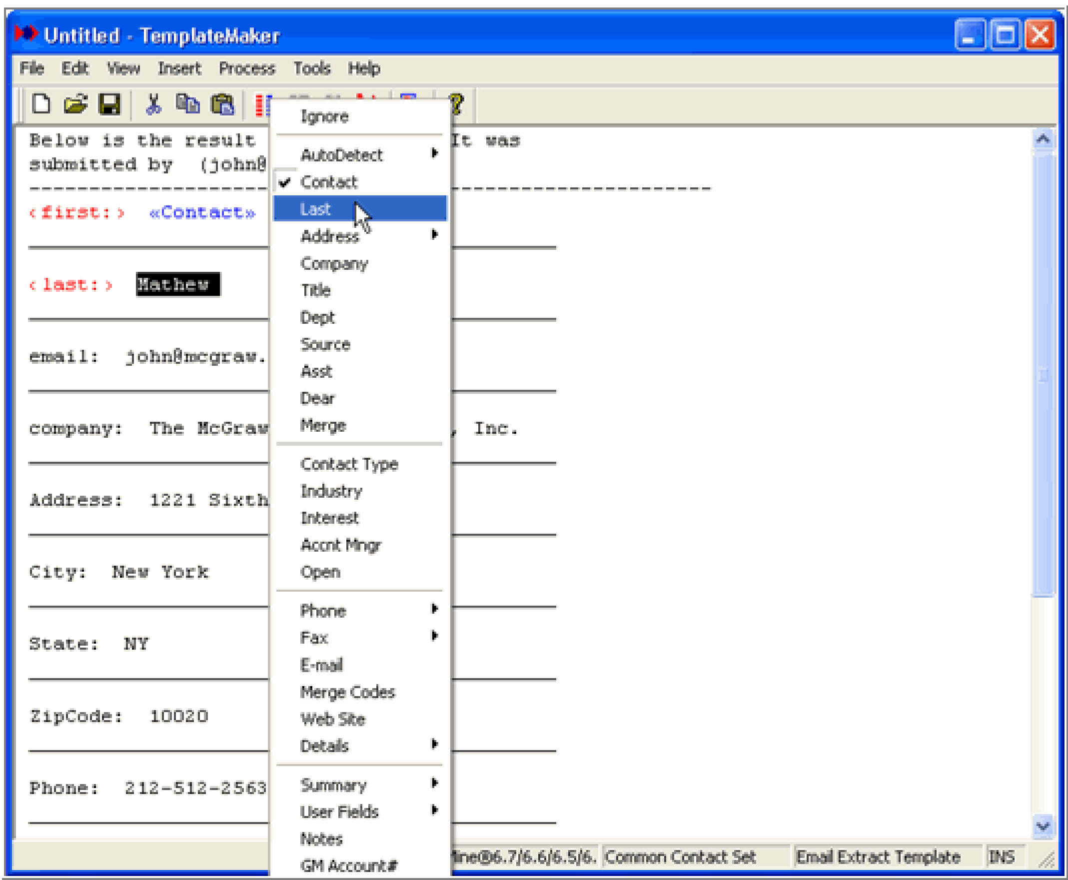

Figure 51: Map Fields

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

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

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.

12. 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.

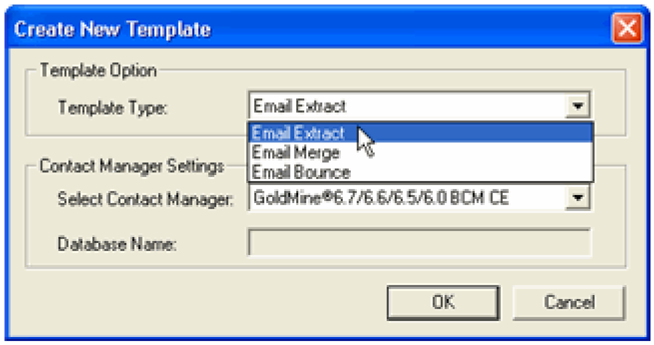

Figure 52:Select Template Type

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 10 for details on the Link Options.

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 53.

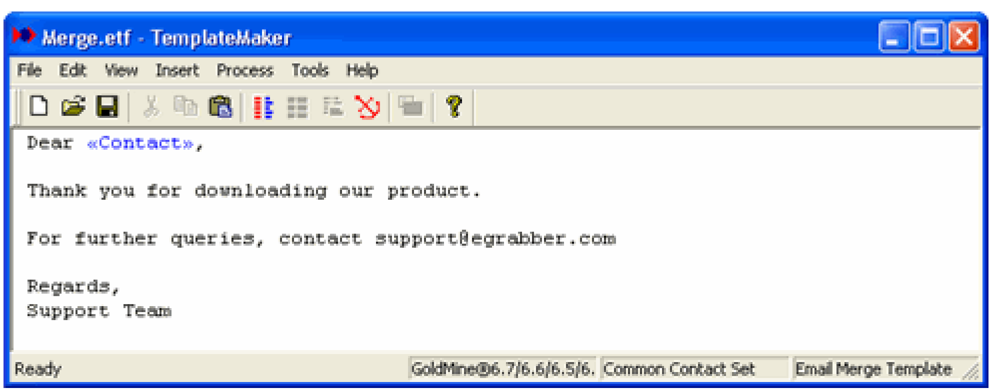

Figure 53: Mail Merge Template

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.

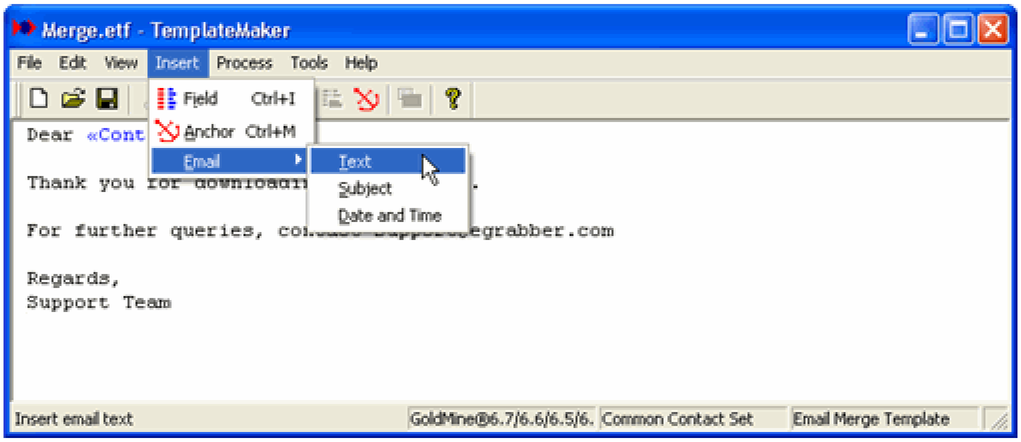

Figure 54: Insert details from received Email in Merge Template

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 10 for details on attaching the Merge Template to Email Extract Template.

13. 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 52).

13.1. 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 55.

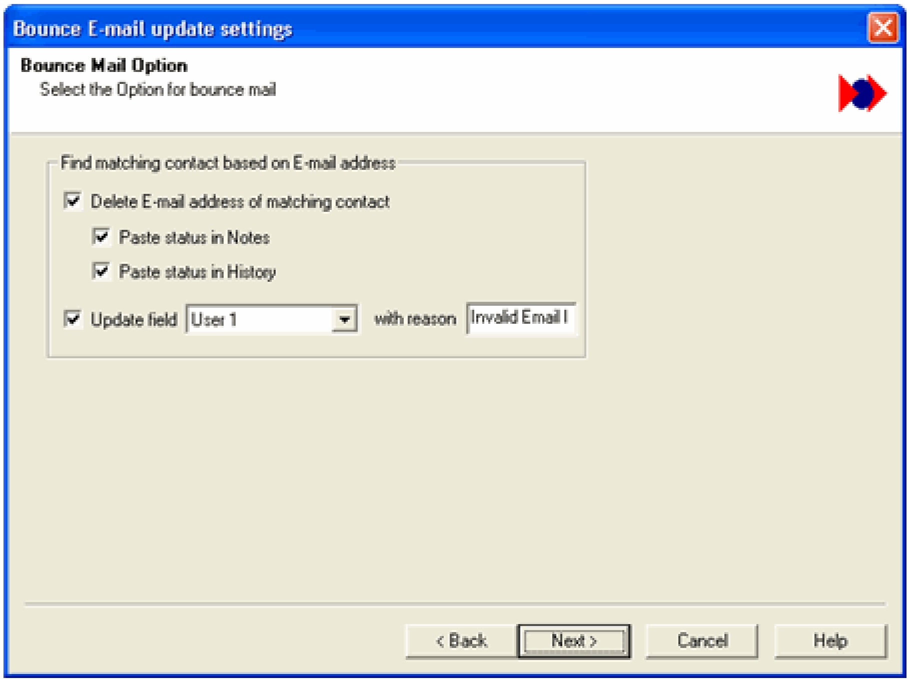

Figure 55: Bounce Email Settings

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.
    - **Paste status in Notes:** Select this checkbox so that the changes are saved in the **Notes** section for future reference.
    - **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.**

13.2. Exclude Email List

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

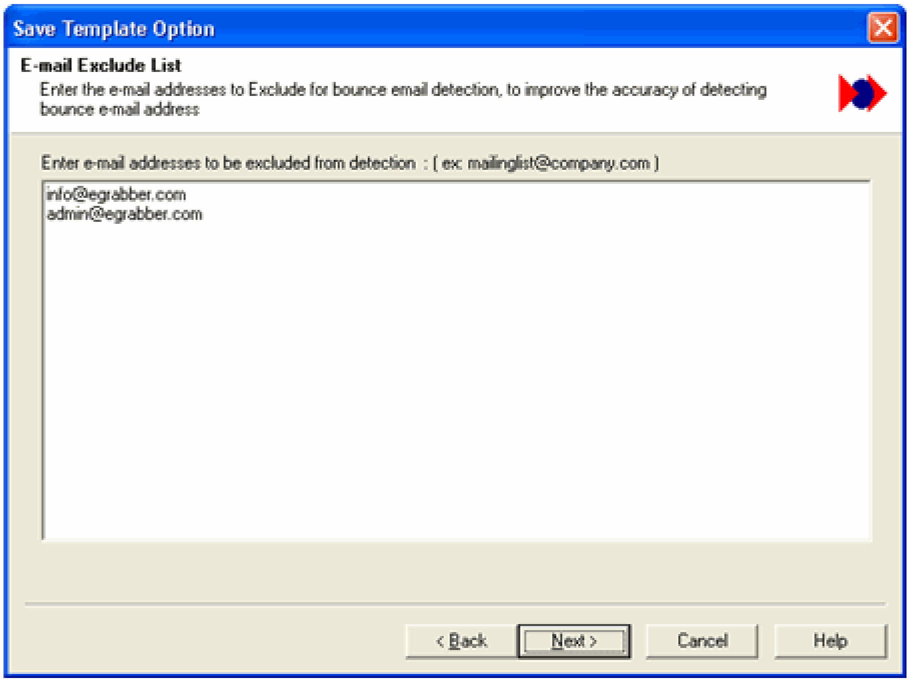

Figure 56: Email Exclude List

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.

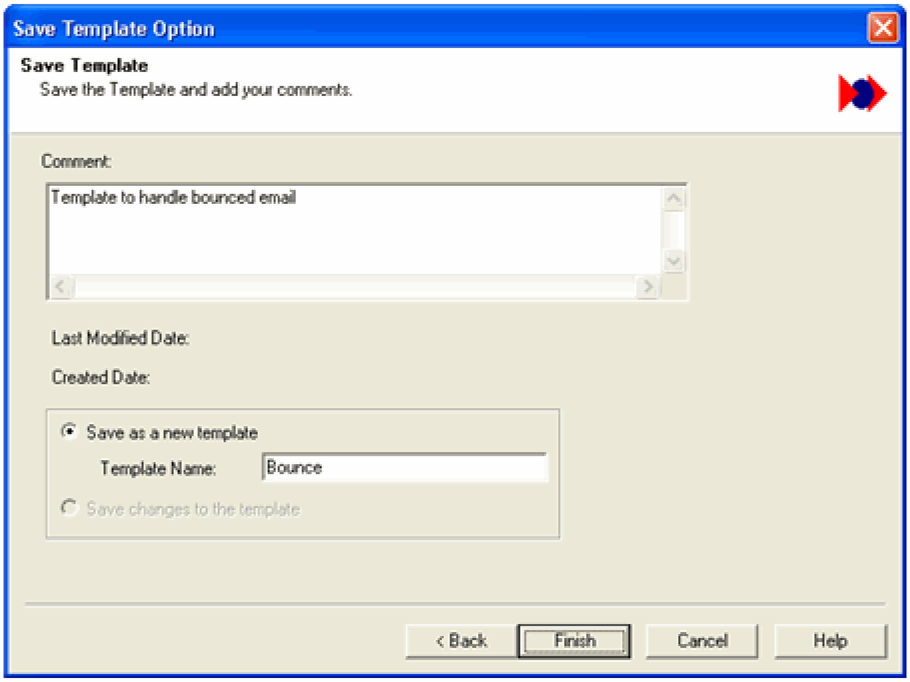

Figure 57: Save the Bounce Template

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.

14. 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 58 that illustrates TemplateMaker with a template created for GoldMine 7.0

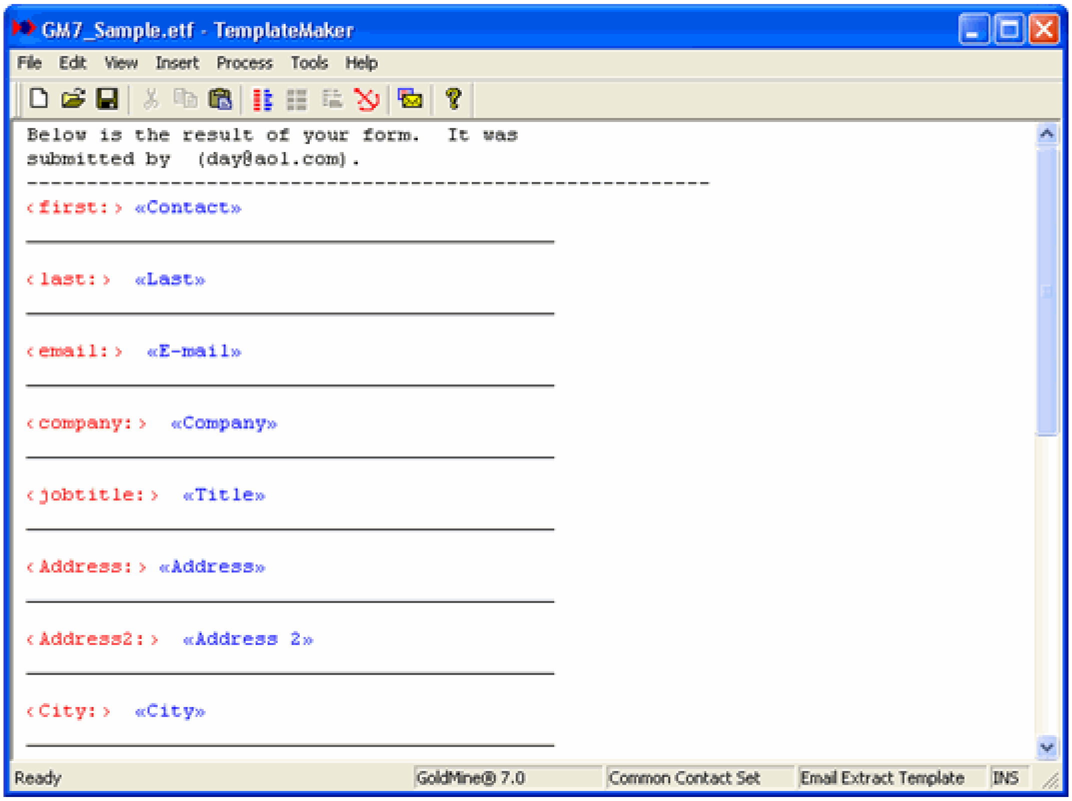

Figure 58: TemplaterMaker

14.1. 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 Email fields.

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.
Set Process	Attaches automated processes.
Lead Source	This feature is currently not available.
Set Activity	Schedule activities while transferring contact records.
Email Header	Setup Email Header values for sending email using mail merge. This option is enabled for an Email Merge Template only.
Attach Source	Save the email contents in a text file.
Keyword Search	Search for specific keywords and save the search results in selected fields.
Mail Merge	Attach a Mail Merge Template to the currently opened Email Extract Template. This option is enabled for an Email Extract Template only.
Set Predefined Values	Assign pre-defined default values to specific fields.

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.

14.2. 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.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.

15. 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.

15.1. 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:

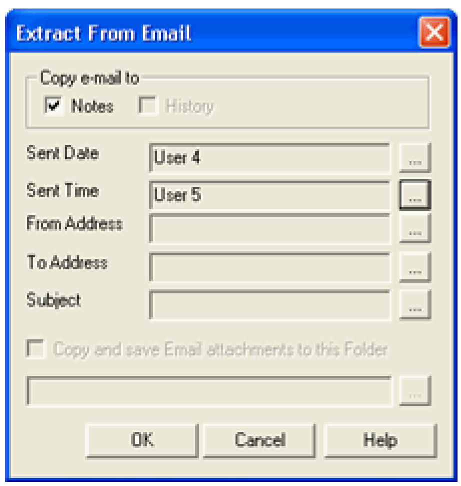

Figure 59: Extract from Email

Notes: Select this checkbox to save the email text in the **Notes** tab of selected database. 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.

15.2. 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:

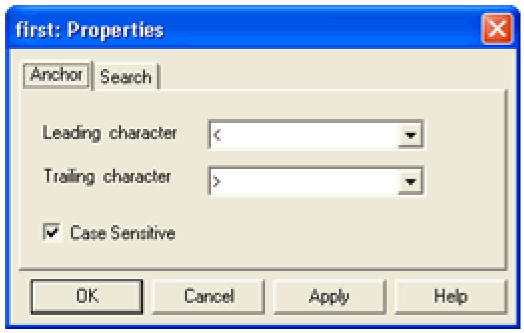

Figure 60: Anchor Properties

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.

15.3. 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.

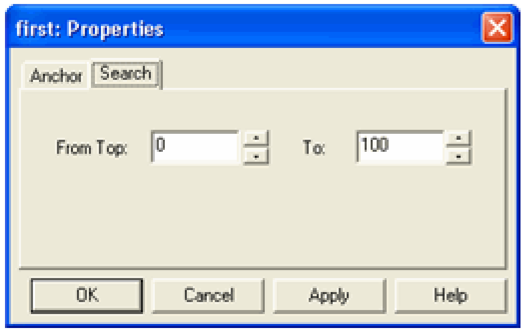

Figure 61: Search Properties

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.

15.4. 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:

15.4.1. 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:

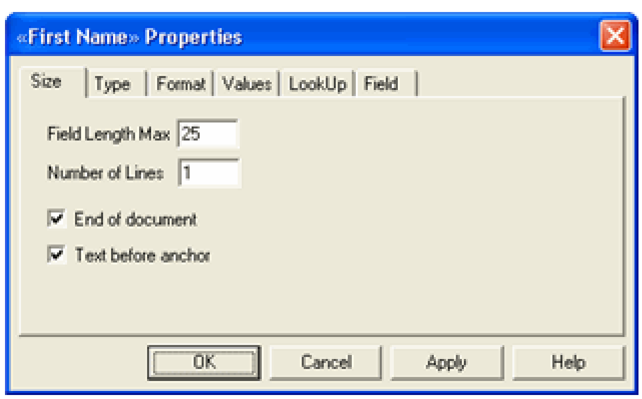

Figure 62: Properties - Size

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.

15.4.2. 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.

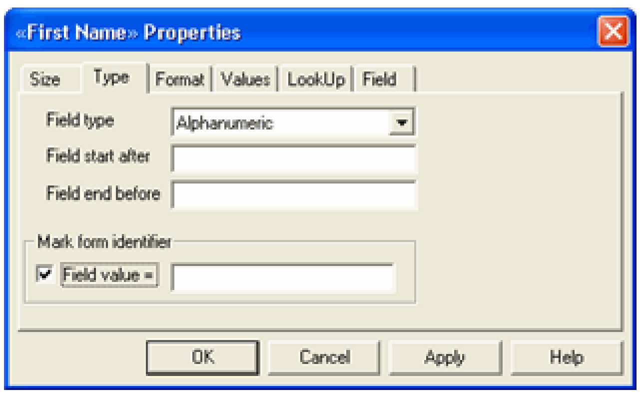

Figure 63: Properties - Type

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.

15.4.3. Format

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

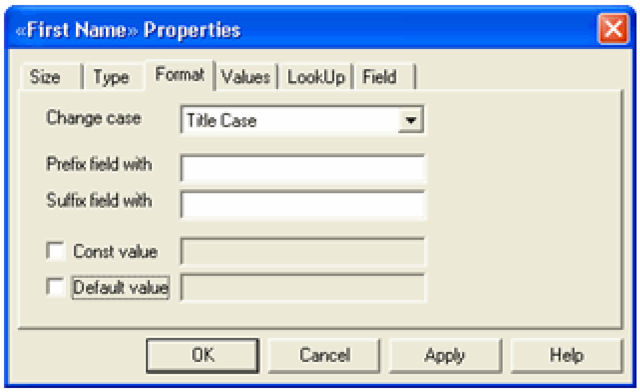

Figure 64: Properties – Format

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.

15.4.4. 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**.

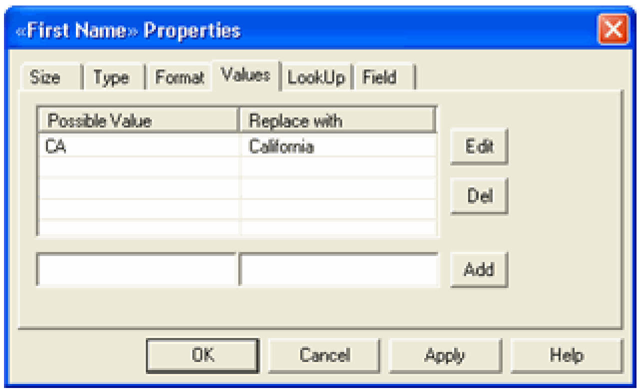

Figure 65: Properties – Values

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.**

15.4.5. 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.

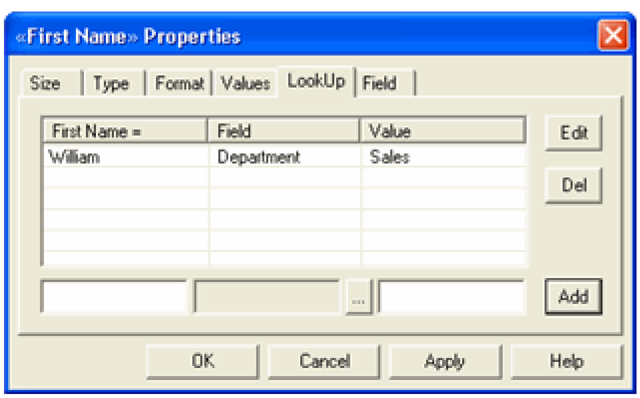

Figure 66: Properties – LookUp

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.**

15.4.6. Field

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

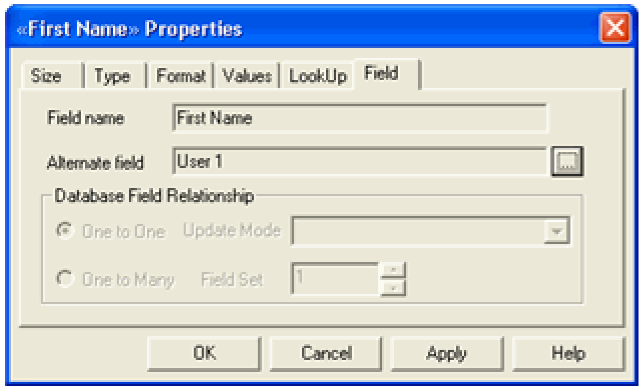

Figure 67: Properties – Field

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.

Database Field Relationship:

This option is enabled for GoldMine Business Contact Manager only that can integrate SQL database.

When your email form contains multiple values for a single field or multiple details for a single contact, you can use this option to map the fields and transfer them.

One to One: You can select this option when you receive multiple values for a single field.

For example, assume that your form contains the following data:

FirstName: William

Last Name: Stevenson

Source: Others

Source: Search Engine

Note that the field **Source** contains two values, **Others** and **Search Engine.**

When you map the form tag **Source** as anchor text twice, the second tag is marked as **Source1.** You can map the form data to the same field twice and the second value is marked as **Source:1**.

After Mapping, your template appears as follows:

‹FirstName:› «Contact»

‹Last Name:› «Last»

‹Source:› «Source»

‹Source:¦1› «Source:1»

After selecting the **One to One** option, in the **Update Mode** list, you can select either one of the following options:

- Select the **Concatenate** option to append the multiple values in the field. If you select this option, then the value is saved as “Others, Search Engine” in the field “Source”.
- Select the **Lookup and Replace** to replace the existing values with the modified data. In this case, the first value is replaced with the second value.

One to Many: Select this option when your email form contains multiple details for a single contact. You can transfer the multiple details to user fields for the same contact.

For example, assume that your Order Form contains following data.

```
Item: eMail-Lead Grabber Business
Quantity: 1
Description: Single user license
Item: eMail-Lead Grabber GMSQL
Quantity: 2
Description: Single user license
Bill to:
First Name: James
Last Name: Webber
E-mail: James@auction.com
```

The contact **James Webber** is to be transferred to your destination. Note that there are two values for the fields ‘Item’, ‘Quantity’, and ‘Description’. Now you need to save these details in the details tab of the contact James Webber.

You can map the values for the same fields. After mapping, the template appears as shown below:

‹Item:›«Item.Reference» (First Item)

‹Quantity:›«Item.Qty»

‹Description:›«Item.Notes»

‹Item:¦1›«Item.Reference:1» (Second Item)

‹Quantity:¦1›«Item.Qty:1»

‹Description:¦1›«Item.Notes:1»

‹Bill to:›«Ignore»

‹First Name:›«Contact»

‹Last Name:›«Last»

‹E-mail:›«E-mail»

After mapping, select the **Field Properties** for the second item (Example: «Item.Reference:1») as **One to Many** and enter **1** in the **Field Set** option.

If you have one more item for the same field (Example: «Item.Reference:2), then you need to set this option to **2**.

Similarly, select the second item for other fields and set the **Field Set** option to 1. For more number of items, set this option accordingly.

After transfer, the details for the single contact are transferred to your GoldMine database as shown in Figure 68

Figure 68: Data transferred to Details tab

You may receive multiple values for fields available in Registration Forms and Feedback Forms. You can use the database relationship option to transfer these values.

Click **OK** to save the settings.

15.5. 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**.

15.6. 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.

16. 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.

16.1. 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.

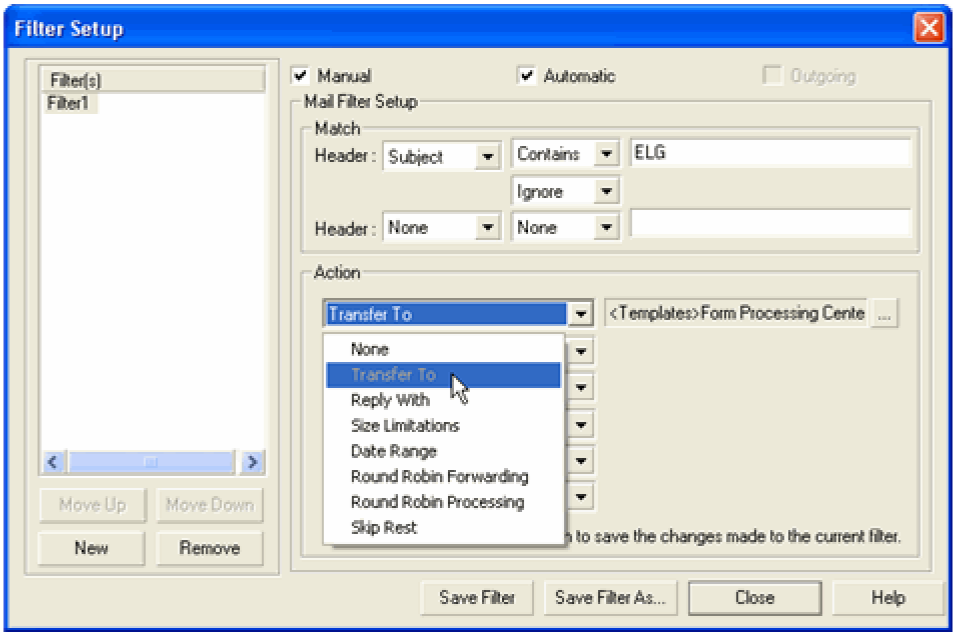

Figure 69: Setup Filter

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.

16.2. 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 69 the messages with the subject line that contains the text "ELG" are processed through the filter.

16.3. 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.

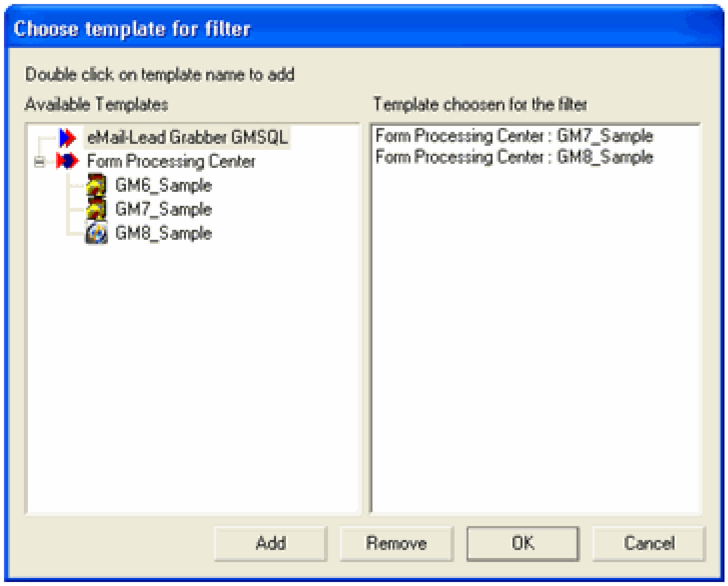

Figure 70: Select templates

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 choosen 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 the filter processes a message, a response is sent to the sender of the message as per the settings you have made in the Stationery file. Refer to 16.4 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:

- wiiliam@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 71.

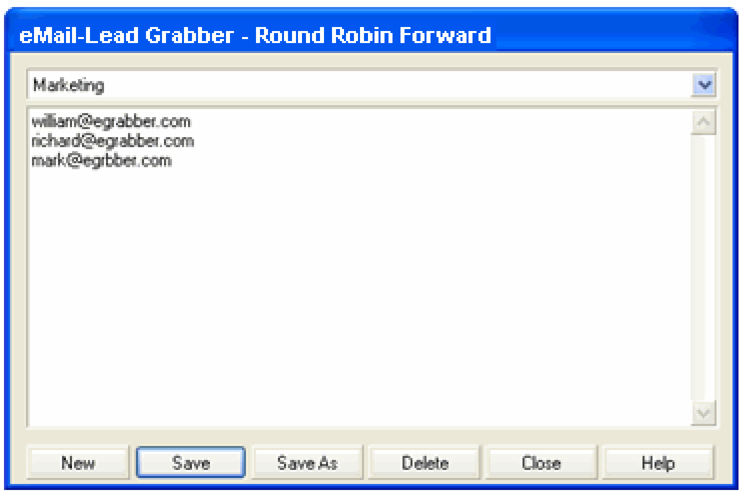

Figure 71: Round Robin Forwarding

- 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.

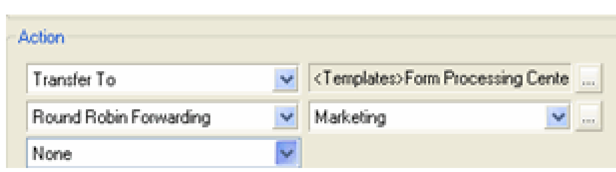

Figure 72: Round Robin Forwarding selected in Filter Action

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:

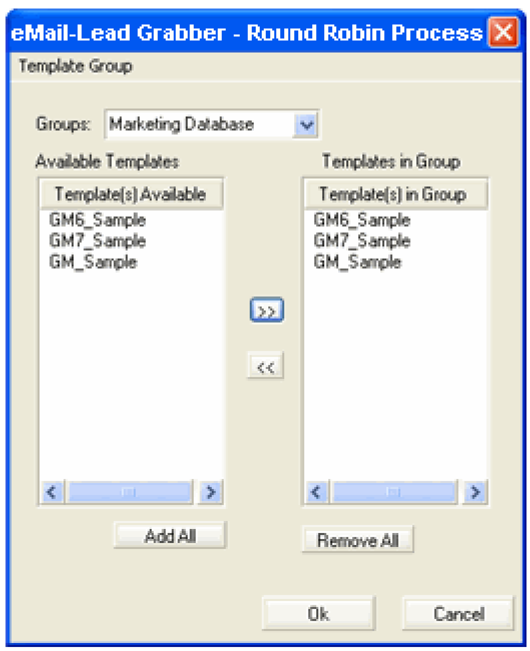

Figure 73: Round Robin Processing

- 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.

In the above example, the first message is processed through GM6_Sample; the second message through GM7_Sample and the third message is processed through GM_Sample. The fourth message is again processed through GM6_Sample and the cycle is repeated.

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

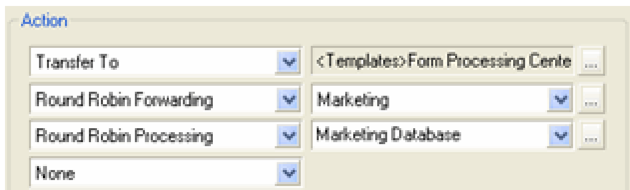

Figure 74: Round Robin Processing selected in Filter Action

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 **WRG Test** 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 doest 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.

16.4. 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.

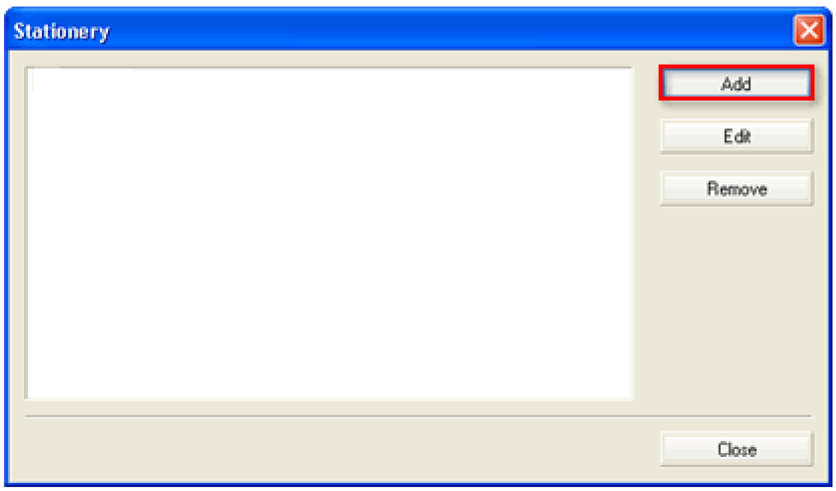

Figure 75: Create Stationery

A new message window appears as shown in Figure 76.

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

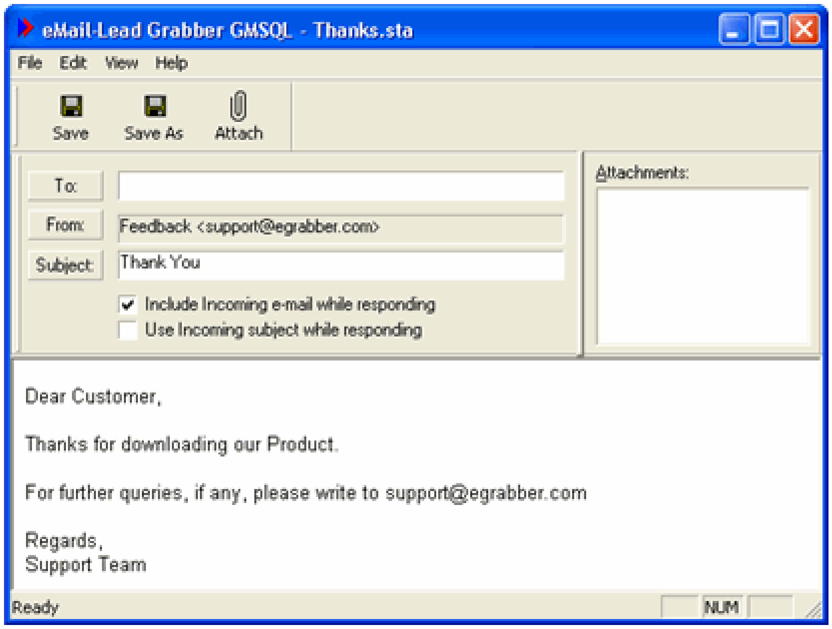

Figure 76: Sample Message to be sent as Auto Response

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.

16.5. 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.

17. 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.

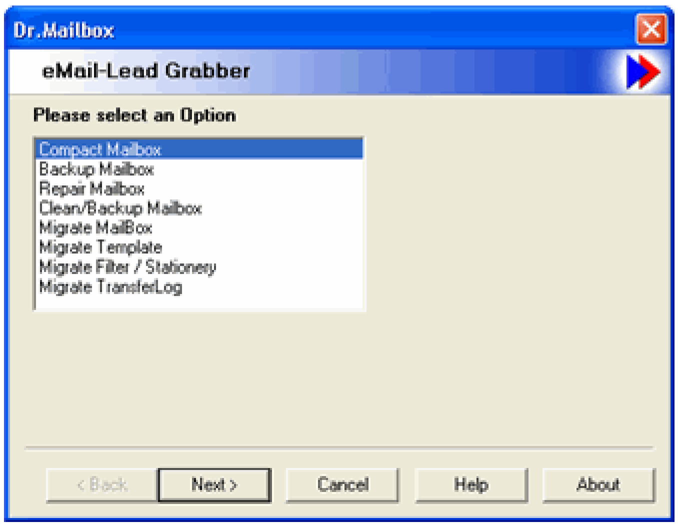

Figure 77: Dr. Mailbox to mainatin the Mailbox

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 you mailbox is overloaded with 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.

18. 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.

19. 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 78: Ready Reckoner

20. License Agreement

This legal document is an Agreement between you, the end user, and eGrabber (THE COMPANY). By installing this software, you are agreeing to become bound by the terms of this agreement, which includes a software license and disclaimer of warranty.

This agreement constitutes the complete agreement between you and the company. If you do not agree to the terms of this agreement, do not install the software. Promptly return the package and the other items that are part of this product to the place where you obtained them for a full refund.

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8. REVERSE ENGINEERING - You may not yourself or through a third party reverse engineer, decompile or disassemble the software except, and only to the extent such activity is expressly permitted by applicable laws notwithstanding this limitation.

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