

"Quickest way to transfer email leads into your GoldMine® database"

Quick Start Guide

Takes only a few minutes to read...



1340 S. De Anza Blvd., Suite #106

San Jose, CA 95129

Phone: (408) 872-3103 • Fax: (408) 861-9601

Welcome to eMail-Lead Grabber GMSQL 2008!

Thank you for choosing eMail-Lead Grabber GMSQL. To get started immediately, we have included this Quick Start Guide. It takes only few minutes to read this guide and you can start using the software.

If you have purchased the software with the CD, here is the list of items you will find on your CD:

- ◆ eMail-Lead Grabber GMSQL Installation file.
- ◆ Quick Start Guide (Opens with Acrobat Reader).
- ◆ Read Me (ReadMe.txt).
- ◆ Sample form email messages.
- ◆ Sample template.

Contents

| | |
|--|-----------|
| About eMail-Lead Grabber GMSQL..... | 1 |
| System Requirements | 1 |
| Email Software Supported | 1 |
| GoldMine Versions Supported | 1 |
| Installing the Software..... | 2 |
| Registering the Software..... | 3 |
| Using eMail-Lead Grabber GMSQL | 3 |
| Step 1: Set up Email Account | 3 |
| Set up Outlook..... | 4 |
| Set up POP3 | 5 |
| Step 2: Create a Template..... | 5 |
| Step 3: Set up Filters | 10 |
| Setup to download messages..... | 12 |
| Process through Filters..... | 13 |
| Transfer from your Email client | 13 |
| Technical Support..... | 15 |
| Copyright, License and Trademark..... | 15 |

About eMail-Lead Grabber GMSQL

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, avoid hassle in processing the web forms and to follow up the leads efficiently.

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

System Requirements

- Pentium III
- 128 MB RAM
- 100 MB Free Space in Hard Disk
- Operating System:
 - Microsoft Windows Vista
 - Microsoft Windows XP
- Internet Explorer 5.5 or higher

Email Software Supported

- ◆ Microsoft Outlook 2007 / 2003 / 2002 / 2000
- ◆ Outlook Express 6.x / 5.x
- ◆ Other Source Applications Supported: Clipboard, Selected Text, Windows Explorer files (TXT, RTF, HTM/HTML)

GoldMine Versions Supported

- ◆ GoldMine 8.x / 7.x – Web Import
- ◆ GoldMine 8.x / 7.5.x / 7.x Corporate Edition, with SQL.
- ◆ GoldMine 6.x Corporate Edition, with SQL and dBASE.
- ◆ GoldMine 6.x Business Contact Manager Corporate Edition, with SQL and dBASE.
- ◆ GoldMine FrontOffice Sales & Marketing Version 5.x, with SQL and dBASE.

Installing the Software

To install eMail-Lead Grabber GMSQL:

- ◆ If you have the CD, double-click the installation file in the eMail-Lead Grabber GMSQL folder. Else, visit <http://www.goldmineaddons.com/products/reg-pages/egb-elgsql-reg.asp> to download the installation file.
- ◆ The Install Shield wizard guides you through the installation process.
- ◆ During installation, ensure that your GoldMine application is open.
- ◆ Installation wizard prompts you to log on to GoldMine database.



Figure 1: Login - GoldMine Database

- ◆ Click **Get GoldMine Details**. The entire database details about GoldMine are automatically retrieved.
- ◆ **Password**: Enter the GoldMine database password.
- ◆ Click the **Login** button. The message *“Logged in Successfully”* is displayed in the Status area.
- ◆ Click **Apply** and **OK**.

When you finish the wizard, you have successfully installed the software.

Registering the Software

After installation, **eGrabber Product Registration** dialog box appears. If you have purchased the software or registered for a trial version, you should have received the License Key via email.

- ◆ **Purchased the software:** If you have purchased the software, type or paste the Purchase Key under "Please type or paste your License Key here" and then click **Register Now**.
- ◆ **Use the Trial version:** If you have registered for a trial version, type or paste the Trial key under "Please type or paste your License Key here" and then click **Register Now**.
- ◆ The message "**Successfully registered**" appears under the **Status** area. Click **Continue** to start using the Software.



The trial version is fully functional, but limited to be used for 10 days. You can transfer details from 100 email messages during the trial period.

- ◆ **Evaluate for 3 days:** Click **Continue Trial** to evaluate the software for 3 days.

Using eMail-Lead Grabber GMSQL

After registration, a setup wizard is launched. You can set up eMail-Lead Grabber in a few minutes according to your needs by using the wizard.

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

- ◆ [Step 1: Set up Email Account](#)
- ◆ [Step 2: Create a Template](#)
- ◆ [Step 3: Set up Filters](#)

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

Step 1: Set up Email Account

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

Set up Outlook

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



Figure 2: eMail-Lead Grabber Toolbar - Select Accounts

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

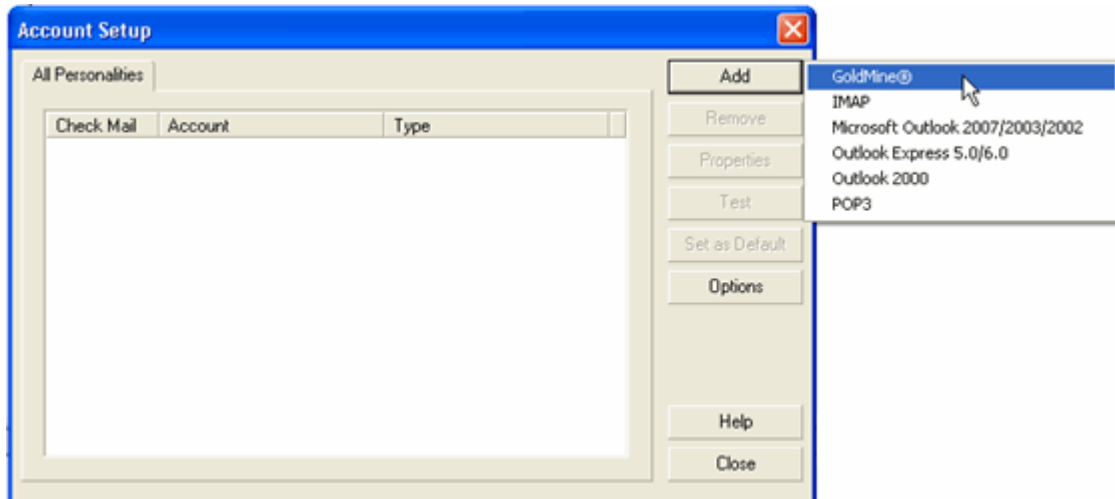


Figure 3: Account setup

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

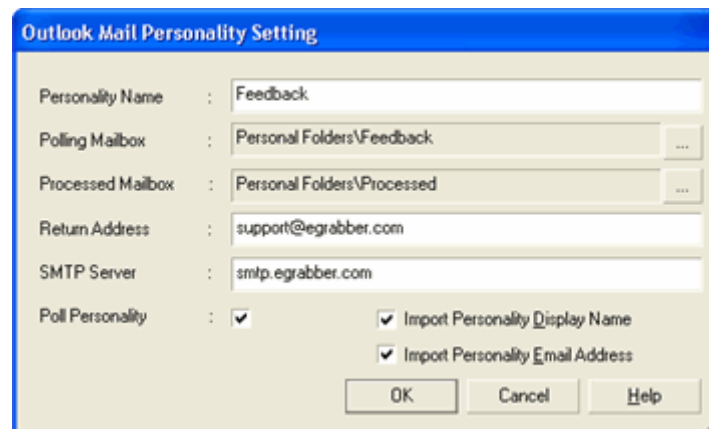


Figure 4: Personality settings for Outlook

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

Set up POP3

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

Step 2: Create a Template

Right-click on the Web form Email and click **Create Template>Advanced Mode** to launch the TemplateMaker.

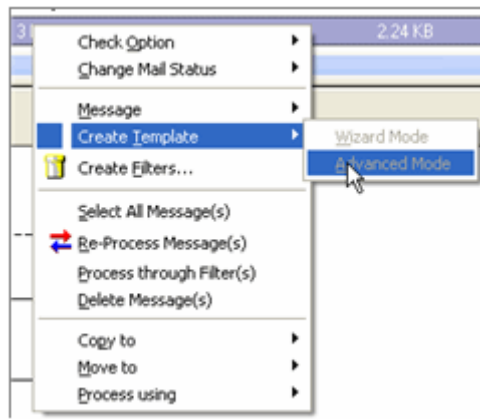


Figure 5: Create Template in Advanced Mode

Create New Template

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

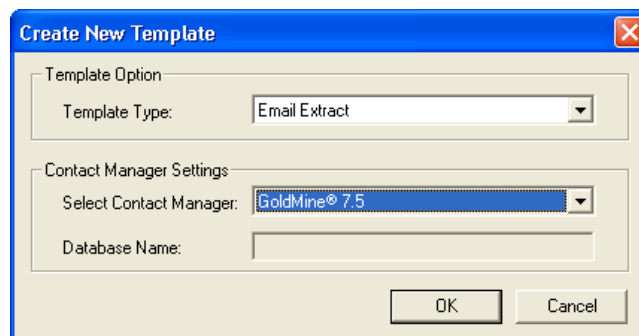



Figure 6: Create Template for GoldMine

Login to GoldMine

- In the **Login** window that appears, click **Get GoldMine Details**
- Enter your login information
- Click **Login**. The message “**Logged in Successfully**” appears in the **Status** box.
- Click **Next**

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

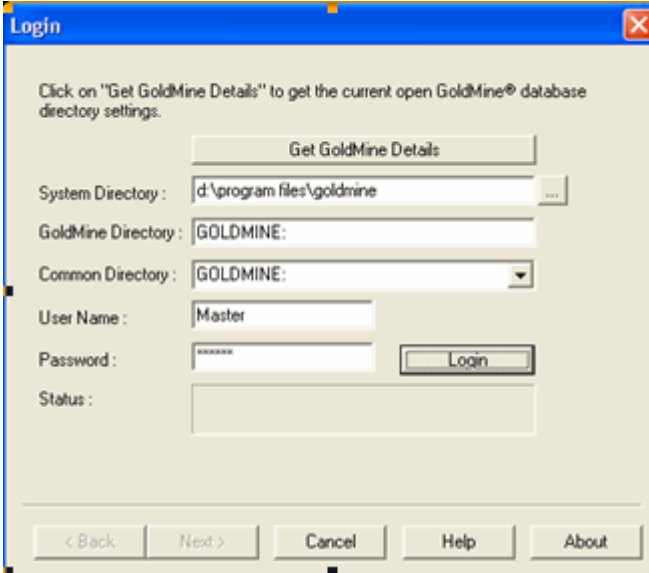


Figure 7: Login to GoldMine

Select Detail Fields

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

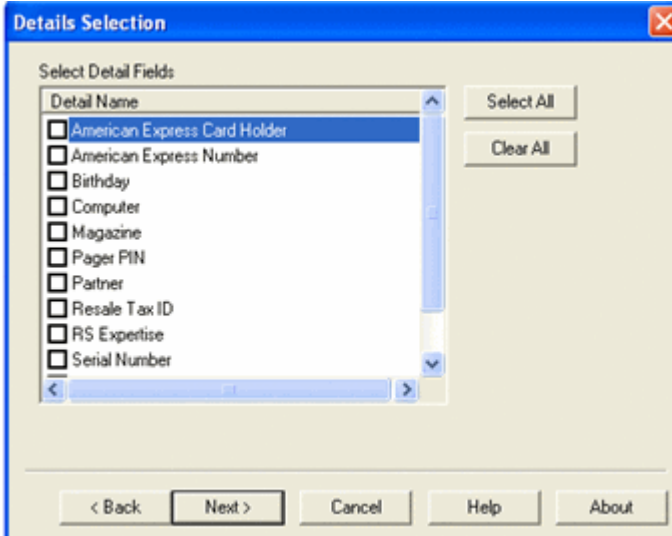


Figure 8: Select Details

Select User Fields

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

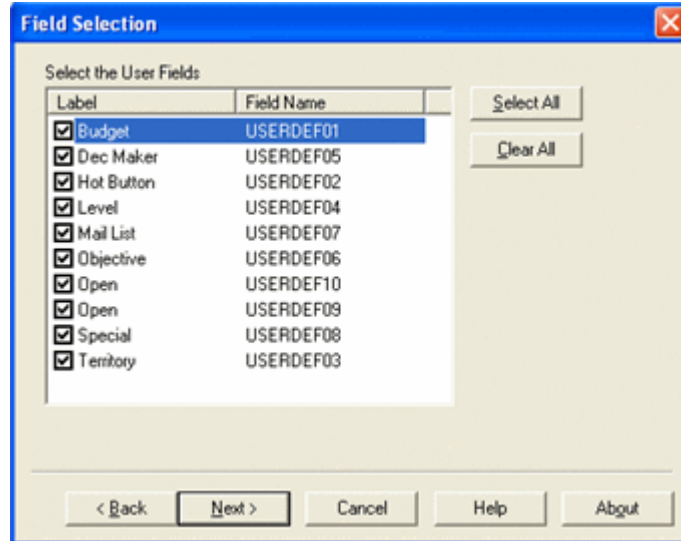


Figure 9: Select User Fields

Duplicate Check Setup

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

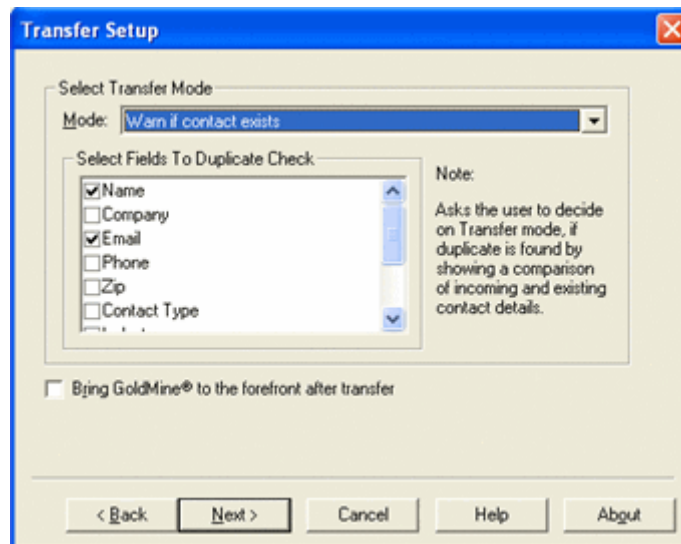


Figure 10: Check for Duplicates

Attach a Process

- In the **Processes** window, if you want to attach a process, select the **Attach Process after transferring records to GoldMine** checkbox.
- Select the processes to be attached to a contact and click **Next**.

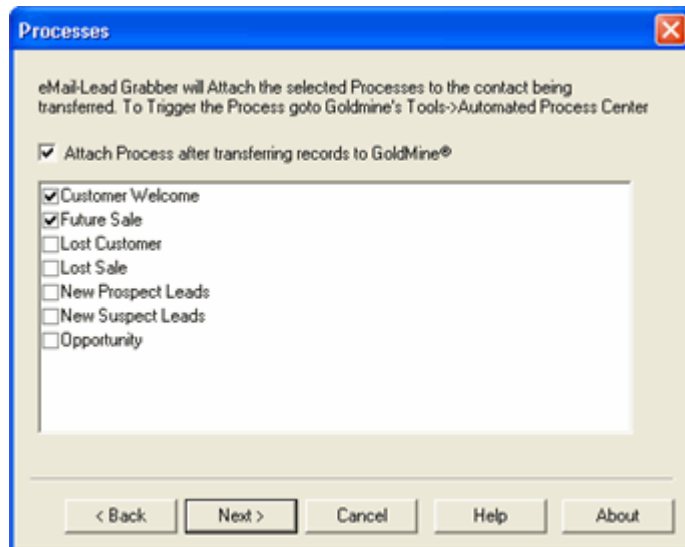


Figure 11: Attach Process

Schedule Activities

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

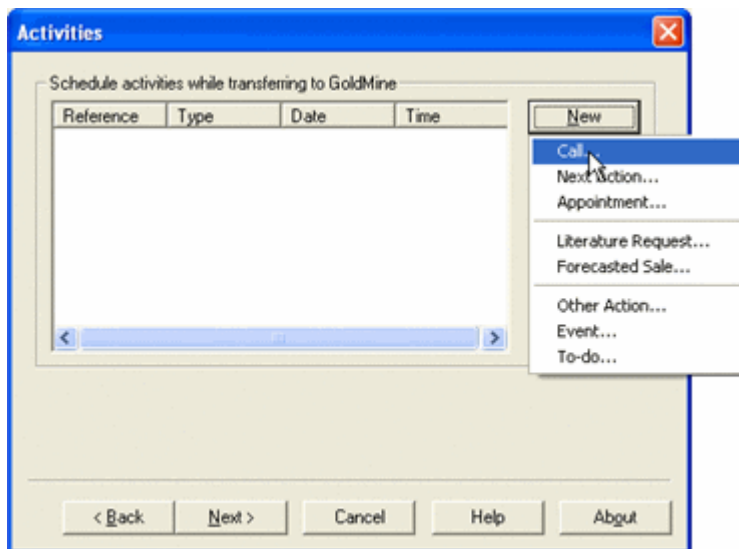


Figure 12: Schedule Activities

Miscellaneous Setup

- The **Miscellaneous Settings window** enables you to customize miscellaneous details. Select the required settings and click **Finish**.

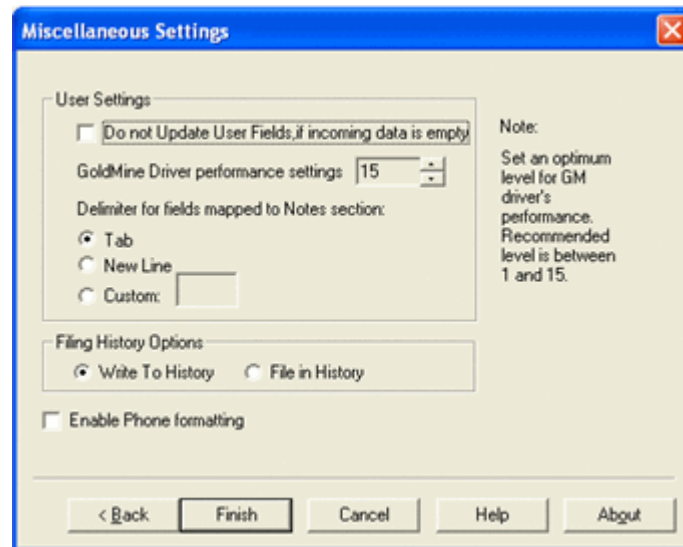



Figure 13: Miscellaneous Settings

Mapping the Fields

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

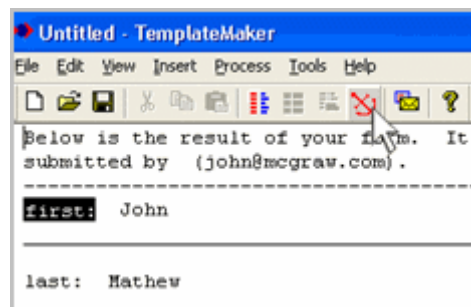


Figure 14: Mapping the fields

Mapping the Values

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

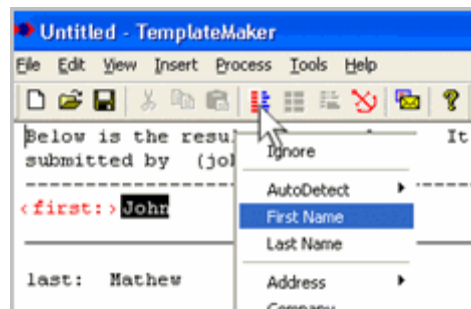


Figure 15: Mapping the values

Repeat the steps until all your tags and values have been mapped to their respective fields in the GoldMine database.

Click **File > Save** to save the template. The template is now listed in the Form Processing Center.

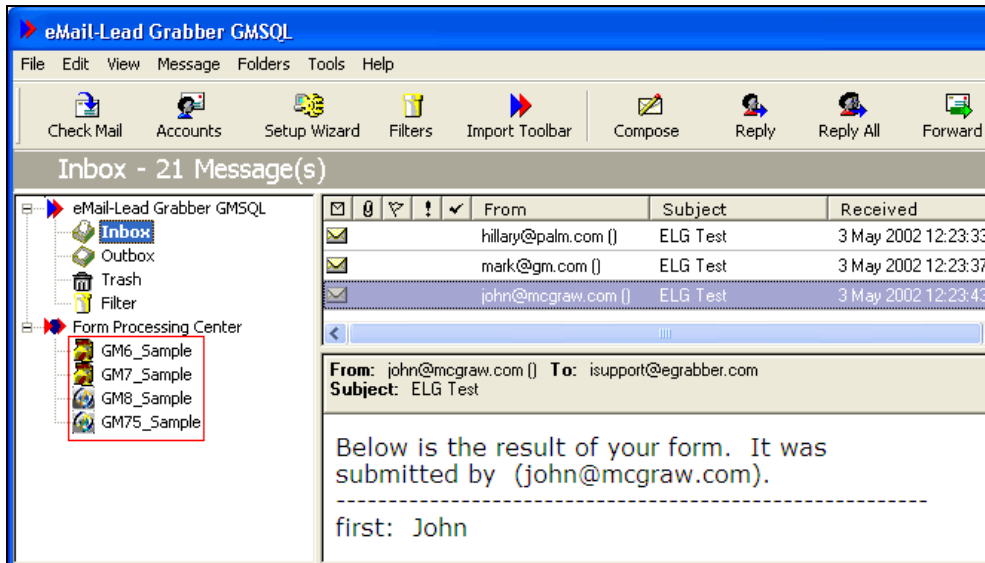


Figure 16: Templates added to Form Processing Center

Step 3: Set up Filters

Click **Filters** on the eMail-Lead Grabber toolbar



Figure 17: Filter Setup

Click **New** on the bottom left and type a name for the filter.

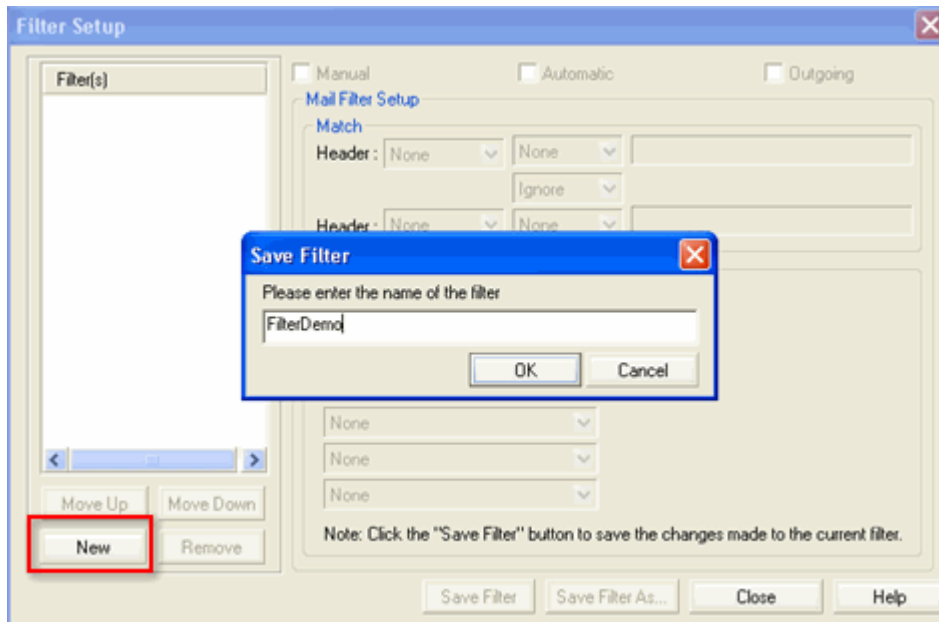


Figure 18: Create Filter

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

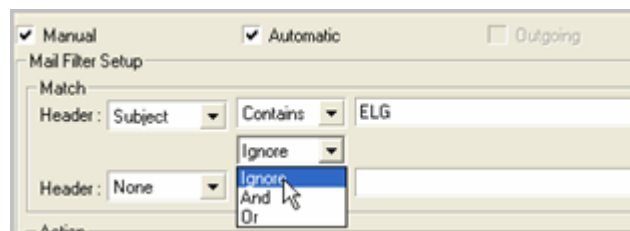


Figure 19: Setup Filter Condition

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

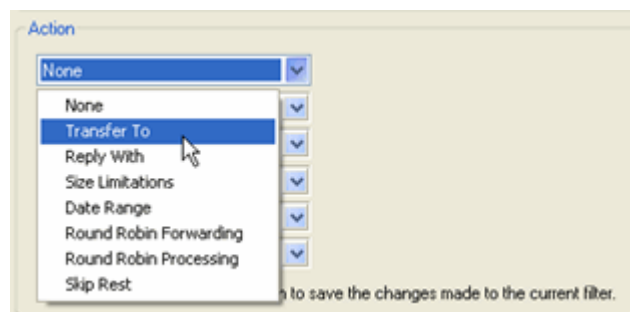


Figure 20: Setup Filter Action

In the pop-up window that appears, select the template to which you want to process the emails and click **Add**.

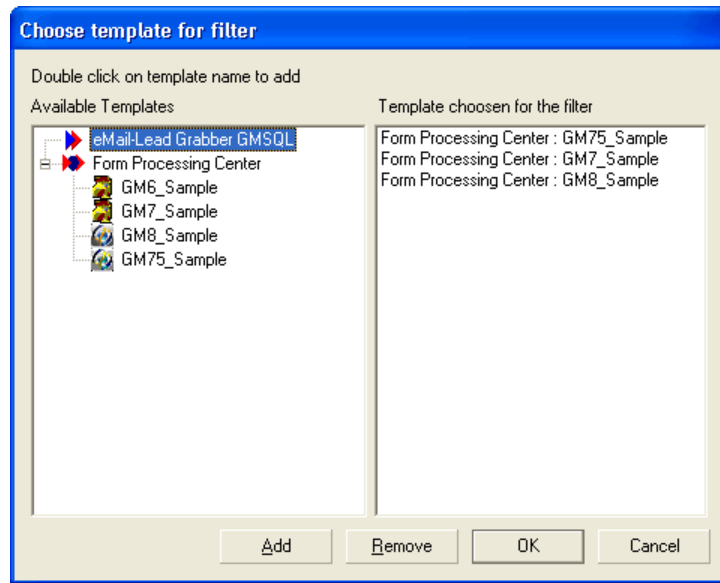


Figure 21: Select Templates

Save the filter and close the window.

Setup to download messages

After finishing the setup of all the options, set the timer to check for new emails. Click **Tools>Options** and select the option **Automatically download new messages** and set the time interval to check for new emails.

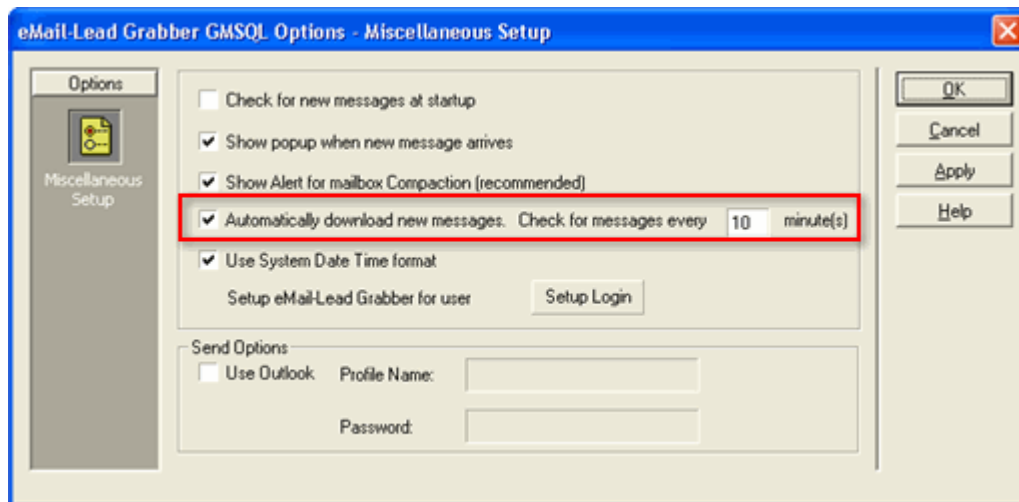


Figure 22: Setup to download messages

Process through Filters

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

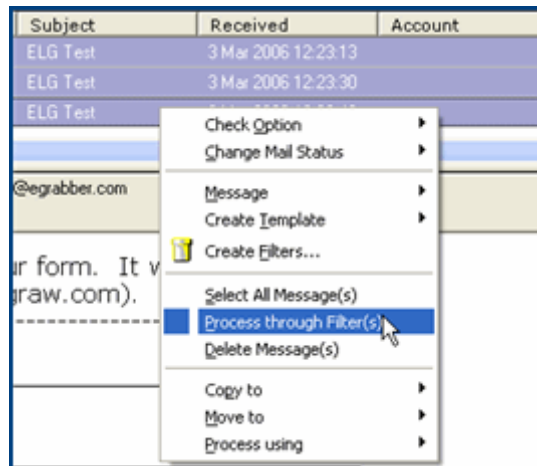




Figure 23: Process through Filters

The  **Task Status** tab in the Status report at the bottom displays the percentage of progress during the transfer process.

Click the  **Process Status** tab and the last column displays "Transfer Successful" if the form email is successfully transferred to your database. The selected form email is processed by the Sample Template and transferred to create new Contacts in GoldMine database.

If your database is open, then the transferred contact is displayed in front of the window.

Transfer from your Email client

If your Email client is not supported by eMail-Lead Grabber, you can use the Import Toolbar to download the email into the Inbox or to the database using appropriate templates.

Click **Import Toolbar** on the eMail-Lead Grabber toolbar.




Figure 24: Launch Import Toolbar

- Select the email from the Inbox of your Email client.
- Select your Email Client from the **Source** list of the Import Toolbar.
- Select the Inbox or appropriate template from the **Destination** list of the Toolbar.
- Click **GO**.

The selected email is processed creating new contacts in your database.




Figure 25: Import Toolbar

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

You can also:

- ◆ Transfer web form email and populate details tab, user fields, key fields, Notes field and summary fields in GoldMine database.
- ◆ Auto-schedule activities and automated processes for the contact record.
- ◆ Generate ticket numbers for the contact record.
- ◆ Auto-Record email content to Notes tab, attachments to Links tab and email to History tab of the transferred contact.
- ◆ Lookup values in email and auto assign Record Owners/Account Managers/Contact Groups to contact record.
- ◆ Automatically create an additional contact for the primary contact.

And more...

 Refer to Help Topics or User Guide for more information.

Technical Support

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

Fax: (408) 861-9601

E-mail: support@egrabber.com

Web: <http://www.goldmineaddons.com/products/email-lead-grabber-gmsql.asp>

Copyright, License and Trademark

Information in this documentation is subject to change without notice. The software described in this manual is furnished under a license agreement. In no event will eGrabber be liable for any damages resulting from any defects or from the use of information contained herein. No part of this manual or the software may be reproduced translated or transmitted in any form or by any means electronic or mechanical including photocopying or recording for any purpose without the prior written permission of eGrabber. You may make one backup copy of the program for your own use. The program is protected under the copyright laws that pertain to computer software. It is illegal to make copies of the software without written permission from eGrabber. In particular it is illegal to give a copy of the program or your spare set of disks to another person.

Copyright 1999 – 2009 eGrabber. All rights reserved.

eMail-Lead Grabber GMSQL is a trademark of eGrabber. Other products mentioned in this manual are trademarks of their respective holders.