

AddressGrabber

Business 2010



User Guide

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Preface

This guide explains in detail about the features of AddressGrabber Business 2010. You can find step-by-step instructions to work with the software.

To start with, you can work with the sample addresses provided with the software.

Refer to the Quick Start Guide to install and register the software.

Follow the conventions used in this guide for better understanding of the features.



What is on the CD?

The AddressGrabber Business 2010 CD contains the following:

Item	Description
Installation Files	The files required for installing AddressGrabber Business.
Quick Start Guide	Quick Start Guide provides a short tour about the Software.
Read me (Readme.Txt)	Text file that provides technical information.
Sample Addresses	Sample addresses to test transfer of information.

Conventions

The following conventions are used in this guide:

Convention	Description
	Note: Important or supplemental information.
	Tip: suggestions that are supportive.

1. About AddressGrabber Business

Using AddressGrabber Business, you can transfer addresses from any source that contains addresses into various applications. AddressGrabber extracts the information like Name, Phone, Address, E-mail, Zip and so on. This extracted information can be transferred into appropriate fields in your application.

You can extract addresses from email, documents, web pages or from any address book and transfer the information into various applications.

1.1. Features

- Streamlined process of web form transfer.
- Schedule activities to a contact that enables you to follow your leads quickly.
- Transfer addresses to online web forms
- Verify addresses with USPS website.
- Format the information before transferring into your application.
- Remove unwanted characters while capturing addresses from web forms or email signatures.
- Check for duplicates while transferring into database application like ACT!, GoldMine, Outlook etc.
- Transfer default values to the contact and user fields in ACT!, GoldMine, and Outlook.

1.2. Supported Applications

AddressGrabber business supports various applications like CRM packages, Contact Managers, Accounting Packages, Shipping Packages, Label Printers etc.

Refer to http://www.goldmineaddons.com/products/adgrab_biz.asp for details about the applications that are supported by AddressGrabber Business.

Apart from these applications, you can also use the Data Export to transfer addresses. The data is saved in Comma Separated Values (CSV) format. The CSV file can be imported into any application that supports this format.

1.3. AddressGrabber Toolbar

After installation, AddressGrabber is launched as a floating toolbar. AddressGrabber can be minimized to appear as System Tray Icon.

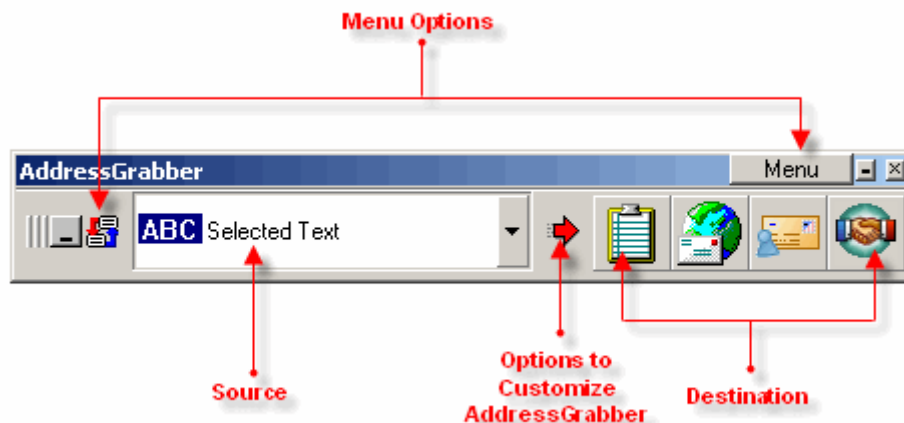


Figure 1: AddressGrabber Toolbar

- From the left pane of the toolbar, you can select the **Source** from which you want to transfer the addresses.
- The **Destination** Applications are displayed in the right pane as Icons.
- You can add or remove the destination icons by using the Menu Options. You can customize the default settings by using the Menu Options.

The following table describes the options available in the Menu:

Menu Option	Function
Options	Customize the default settings. Refer Chapter 2 for more details.
Minimize toolbar	Minimize AddressGrabber toolbar to the System Tray.
Toolbar Always in front	Toolbar always appears in front of other open applications.
Show Smaller / Larger toolbar	Change the size of the toolbar.
Show Transfer Log	View the transferred details saved in a log file.
Sample	Sample list of address to test the transfer.
About AddressGrabber	Displays information about AddressGrabber Business like version number, copyright and contact information.
Help Topics	Launches the Online Help.
Demo	Launches a demo about AddressGrabber.
Info and Support	Opens the Technical support page from the eGrabber website.
Register / Unregister	Opens eGrabber Product Registration dialog box to register or unregister the product.
Live Update	Live Update service is used to instantly update AddressGrabber with the latest files and the service packs.
Exit AddressGrabber	Quits AddressGrabber Business.



The same menu options are also available when you right-click the System Tray Icon.

2. Customize AddressGrabber

Using the AddressGrabber Options, you can

- Configure the transfer options for source and destination application.
- Add or hide destination applications in the toolbar.
- Customize settings to transfer web forms.
- Format the Contact Information.
- Setup miscellaneous options.

2.1. AddressGrabber Options

To launch the AddressGrabber Options,

- Click **Menu / Options** in the AddressGrabber toolbar.

[OR]

- Click  in the AddressGrabber toolbar.

[OR]

- Right click the System Tray Icon and select **Options**.

The AddressGrabber Options window contains the following:

Click	To Do...
Source Links	Customize the Source Application before transferring the information
Destination Links	Customize the Destination Application before transferring the information.
Miscellaneous	Setup Additional Options.
Customize Extraction	Setup web forms before transferring into destination application.
Format	Format the contact information, phone/fax, email etc., before transferring to your database.
Add / Hide Applications	Add or remove applications displays in the AddressGrabber toolbar.
My Address	Enter your personal details and you can transfer these details into the destination application if required.

2.2. Customize Source Application

You can add a Source Application to the AddressGrabber toolbar.

- In the **Source Links** window, select the application and click **OK**.
- The application is listed in the toolbar.

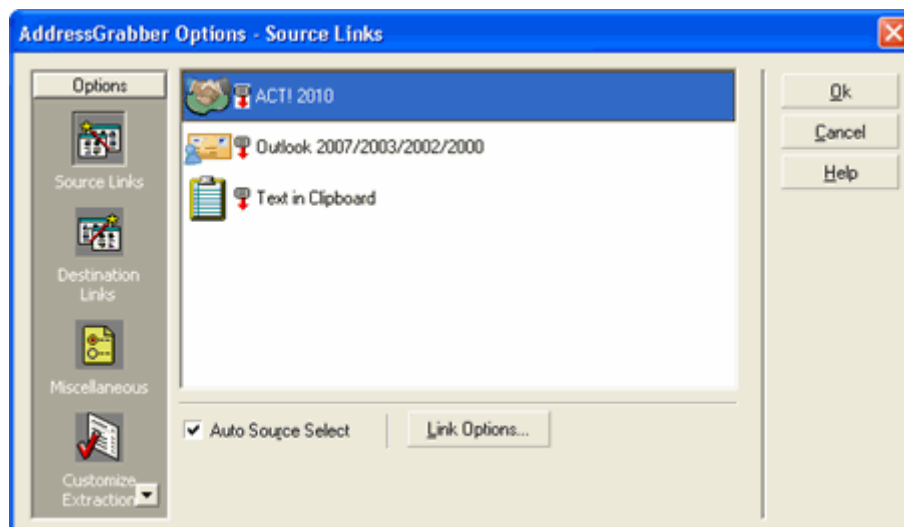


Figure 2: Source Links

Auto Source Select: Select this option so that AddressGrabber automatically detects the source application and displays in the AddressGrabber toolbar.

Example: Open your Outlook and AddressGrabber Toolbar automatically displays Microsoft Outlook as the Source.

Link Options for Source Application

- Select your source application and then click **Link Options**.
- The **Link Options** dialog box opens for the selected source application and the modes of transferring addresses vary for each application.
- **Link Options** customize the settings for your Source application before transferring into your destination application.

The Link Options for various applications are explained in later chapters.

2.3. Customize Destination Application

You can add or remove a destination icon to the AddressGrabber toolbar.

You can also use the **Link Options** to customize the transfer settings of the destination application.

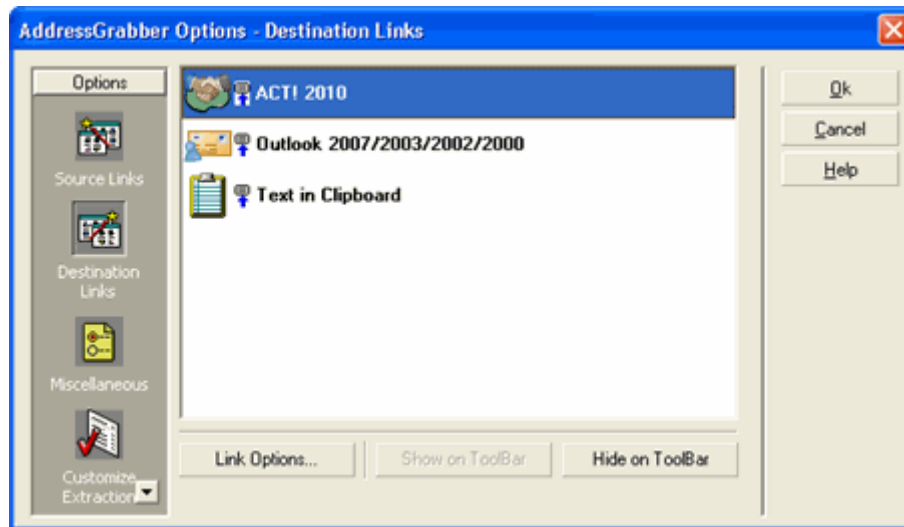


Figure 3: Destination Links

To Add an Icon

- In the **Destination Links** window, select the appropriate destination application and click **Show on ToolBar**.
- Click **OK**.

Now the selected destination appears in the toolbar.

To Remove an Icon

- In the **Destination Links** window, select the appropriate destination application and click **Hide on ToolBar**.
- Click **OK**.

Now the selected destination is removed from the toolbar.

Link Options for Destination Application

- Select your destination application and then click **Link Options**.
- The **Link Options** dialog box opens for the selected destination application and the modes of transferring addresses vary for each application.
- **Link Options** customize the settings for your destination application before transferring the contact details.

The Link Options for various applications are explained in later chapters.

2.4. Miscellaneous Settings

You can customize your System Tray con and other options by using the **Miscellaneous** settings.

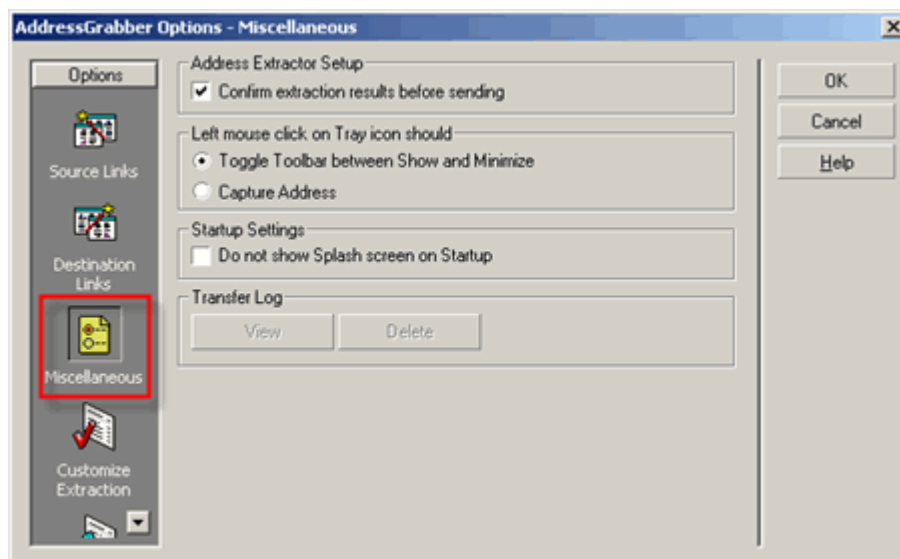


Figure 4: Miscellaneous Settings

You can setup the following options:

Under **Address Extractor Setup**,

- **Confirm extraction results before sending:** This option is selected by default. Select or clear this option to show or hide the Parse Results Window.



While transferring addresses, a Parse Results Window appears with the details of extracted Contact details. You can verify the details, edit them if required, format the details, and then transfer the information into the destination. Refer to [Chapter 3](#) for more details about Parse Results Window.

Under **Left Mouse Click on Tray Icon should**,

You can customize the left mouse click on the system tray icon.

- **Toggle toolbar between show and minimize:** This option is selected by default. Select this option to maximize or minimize the toolbar when you left mouse click on the system tray icon.
- **Capture Address:** Select this option if you want to transfer address from the currently selected source to destination.



Move the Mouse Pointer over the System Tray Icon to view the currently selected source and destination.

Under **Startup Settings**,

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

Under **Transfer Log**,

After transferring the information, the details of transfer status and other information related to the process are saved in a log file. The log file contains transferred details like Date, Time, Source, Destination, Incoming Address, Web form etc.

- Click **View** to view the contents of log file.
- Click **Delete** to remove the log file.



The transfer details are appended to the log file. When the file size becomes 500 KB, a new log file is generated. The old log file is not deleted. You can delete these files by using the miscellaneous settings.



You can also view the log files from the toolbar. Click **Menu / Show Transfer Log** to view the log files.

Click **OK** to save settings.

2.5. Customize to transfer web forms

AddressGrabber can transfer addresses from various web forms into your applications. The method of extraction of address from web form can be customized.

You need to map the web form tags to your application to transfer the data accurately.

You can setup the following options before transferring from web forms.

- Map web form tags automatically or manually.
- Transfer default values to the contact and user fields of your applications.
- Handle unwanted characters in the address.
- Find and Replace keywords to rectify fields that are misinterpreted.
- Remove E-mail junks from the header.

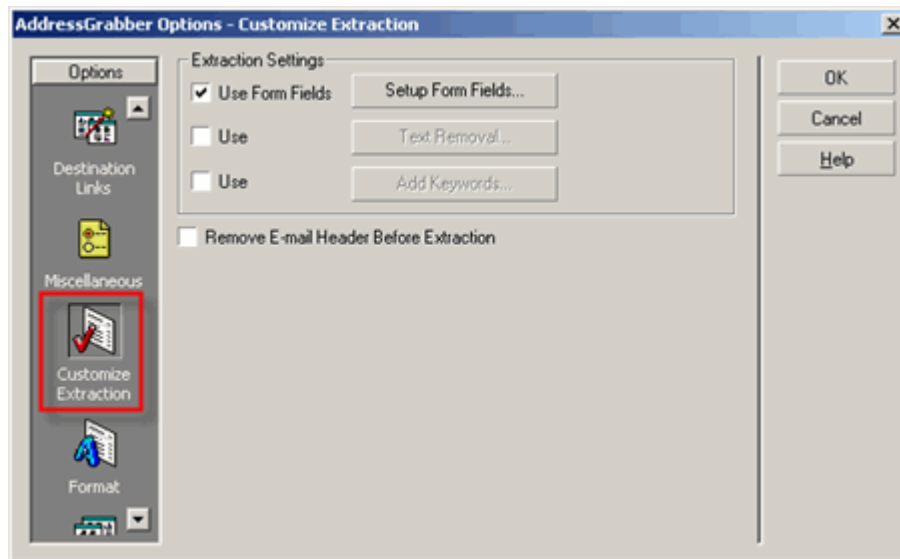


Figure 5: Customize Extraction

2.5.1. Use Form Fields – Setup Form Fields

Click **Setup Form Fields** to launch the form wizard that guides you to map form tags globally for all applications. This ensures high accuracy while transferring data from web forms.

There are three modes of mapping in **Form Field Extraction Method**:

- **Auto - Extract mode:** Automatically maps your web form tags.
- **Manual Mode:** Enter form tags manually.
- **Preview / Edit Existing Settings mode:** You can add form tags and set default values for Contact and User fields.

Using Form wizard you can

- Map Form tags manually or automatically.
- Add default values to the Contact fields.

Map form tags automatically for all applications

Step 1: Select form fields extraction method

Select **Auto-Extract Mode** under **Form Field Entry**.

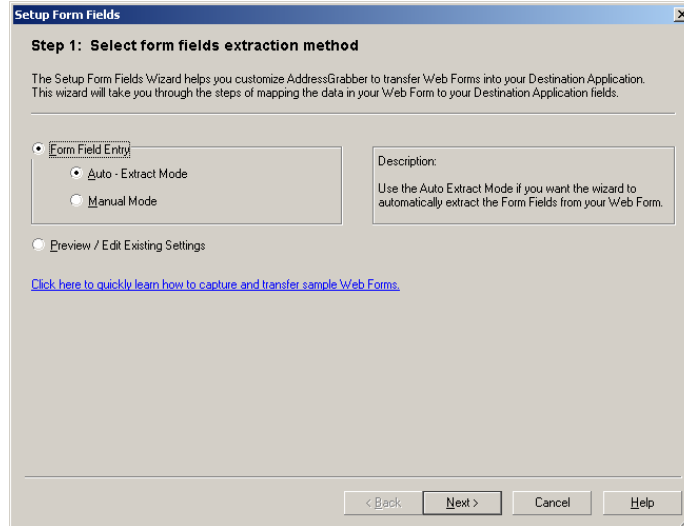


Figure 6: Select form fields extraction method

Click **Next**.

Step 2: Paste your form

Paste or type your web form in the space.

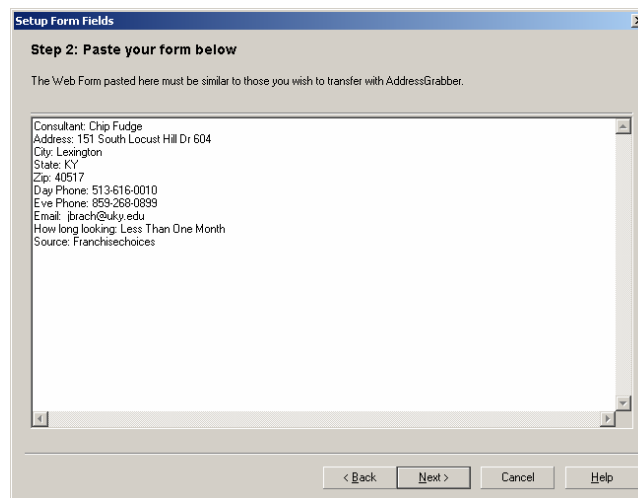


Figure 7: Paste your form

Click **Next**.

Step 3: Select field separator on your form

The separator is detected automatically from the web form and displayed next to **Field separator for form text**. If the separator is not detected type the separator of your web form.

Example:

Form Tag	Form Data
Refer:	Submit

In this example, : **[Colon]** is the separator.

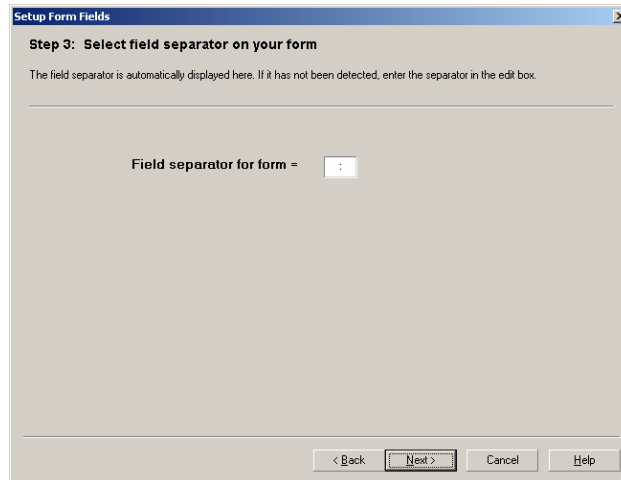


Figure 8: Select field separator on your form

Click **Next**.

Step 4: Map Field Names in Form to fields in destination application

After you click **Next**, a message box appears prompting to Map field names automatically.

- Click **Yes** to map the field tags automatically.
- Click **No** to map the tags manually.

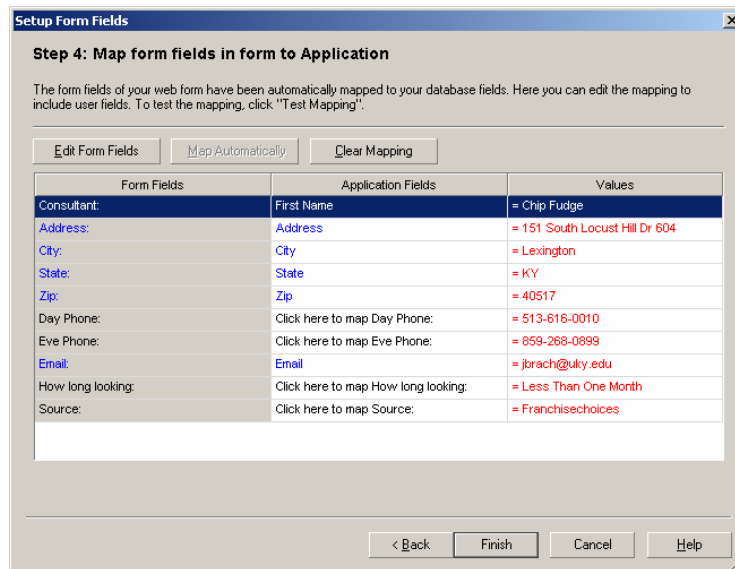



Figure 9: Map form fields

This window displays three columns.

- **Form Fields:** Displays the form tags available in the web form.
- **Application Fields:** Displays the field names that are mapped to the web form tags.
- **Values:** Displays the values from the web form data that you have pasted in Step 2.


 To map a field manually, click the option **Click here to map...** under **Application Fields**.

- Click **Edit Form Fields** and select the tag to modify the tags according to your requirements.

Example:

To change the tag name **Jobtitle** to **Designation**,

- Click **Edit Form Fields**.
- Select the **Jobtitle** field and enter **Designation**.
- Click **Finish Edit Form Fields** to save the changes.
- The tag Jobtitle is now displayed as **Designation**.
- Click **Map Automatically** to map the web form tags automatically to your destination application.
- Click **Clear Mapping** to remove the entire mapping.
- To remove the mapping for a single tag, click the relevant field under **Application Field Names** and select **Ignore map**.

 You can also access the Setup Form Fields wizard from the toolbar. Right-click the ACT!, and GoldMine Icons in the AddressGrabber toolbar. Use the **Test Mapping** option to test the mapped values.

Click **Finish**. If duplicate tags are detected in the form, a message appears prompting whether to remove the duplicate tags. Click **Yes** to remove the duplicate tags.

Map Tags Manually for all applications

Step 1: Select form fields extraction method.

- Select **Manual Mode** under **Form Field Entry**. (Refer Figure 6).

Step 2: Enter form fields

- Enter your web form tags (field names) in the left pane along with the separator. You can enter multiple field names.

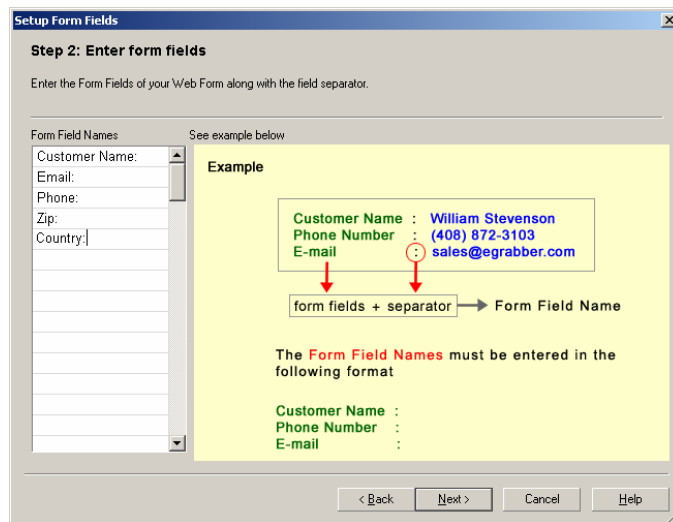


Figure 10: Enter form fields

- Click **Next**.

Step 3: Map field names in form to Application

- You can map the fields either manually or automatically.

On the left is *the Field Name On Form* that shows all the tags of your web form. On the right, you can map to destination application fields.

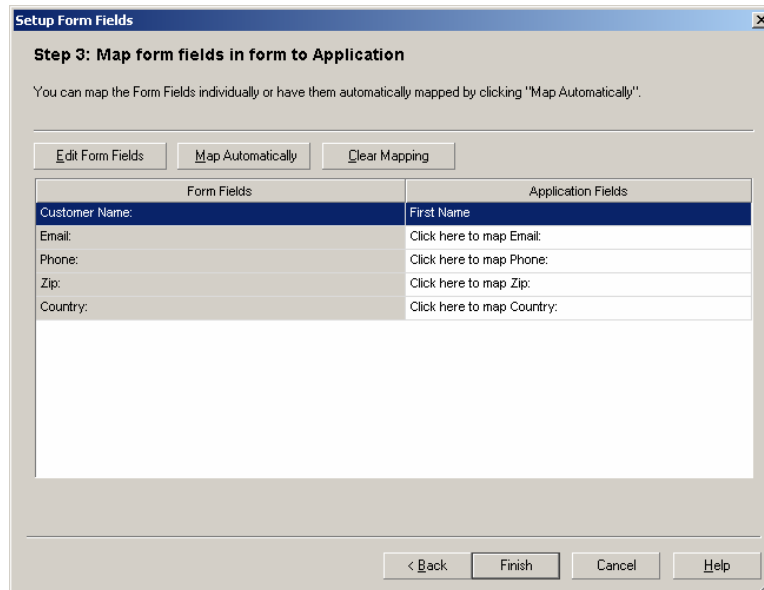


Figure 11: Map field names in form to Application


This window displays two columns.

- Form Fields:** Displays the form tags available in the web form.
- Application Fields:** Displays the field names that are mapped to the web form tags.
- Click **Map Automatically** to map web form tags automatically to your destination application.



To map a field manually, click the option **Click here to map...** under **Application Fields**.

- Click **Edit Form Fields** and select the tag to modify the tags according to your requirements.
 - Example:**
To change the tag name **Jobtitle** to **Designation**,
 - Click **Edit Form Fields**.
 - Select the **Jobtitle** field and enter **Designation**.
 - Click **Finish Edit Form Fields** to save the changes.
 - The tag Jobtitle is now displayed as **Designation**.
- Click **Map Automatically** to map the web form tags automatically to your destination application.
- Click **Clear Mapping** to remove the entire mapping.
- To remove the mapping for a single tag, click the relevant field under **Application Field Names** and select **Ignore map**.

 You can also access the Setup Form Fields wizard from the toolbar. Right-click the ACT! and GoldMine icons in the AddressGrabber toolbar. It also has **Test Mapping** option, which helps to test the mapped values to your applications.

Click **Finish**. If duplicate tags are detected in the form, a message appears prompting whether to remove the duplicate tags. Click **Yes** to remove the duplicate tags.

Preview, Edit and add default values to form tags

Step 1: Select form fields extraction method

- Select Preview/Edit Existing (Refer Figure 6).

Step 2: Preview / Edit field names and set default values

- The field names common to all applications are displayed under **FieldNames**.
- Select the field name to be edited and the possible form field names are displayed under **Edit form field names**:
- **Example:** The field name **Last Name** can be mapped to the following form field names.
 - Last Name
 - Last
 - Lastname
- You can edit the form field names. You can also add other possible field names to this list. **Example:** Last-Name.

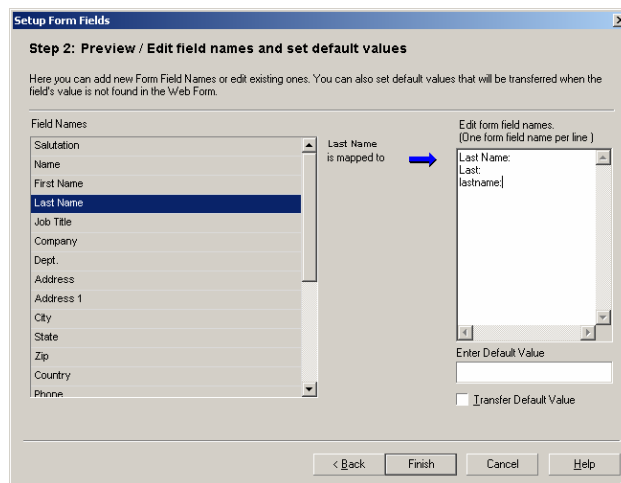


Figure 12: Preview/ Edit field names and set default values

- **Enter Default Value:** Enter the default value to be assigned to the selected field.
- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish**.

Adding Form Tags and assign default values to the User Fields

Apart from the standard address fields, you can add form tags and assign default values to the user fields of applications such as ACT! and GoldMine.



You can add a maximum of 15 user fields to ACT! and GoldMine

- Right-click the corresponding destination icon in the toolbar and select **Link Options**.
- In the **Link Options** window, click the **Transfer In** tab
- Click **Add Form Tags**.

The **Setup Form Fields** for the selected application appears.

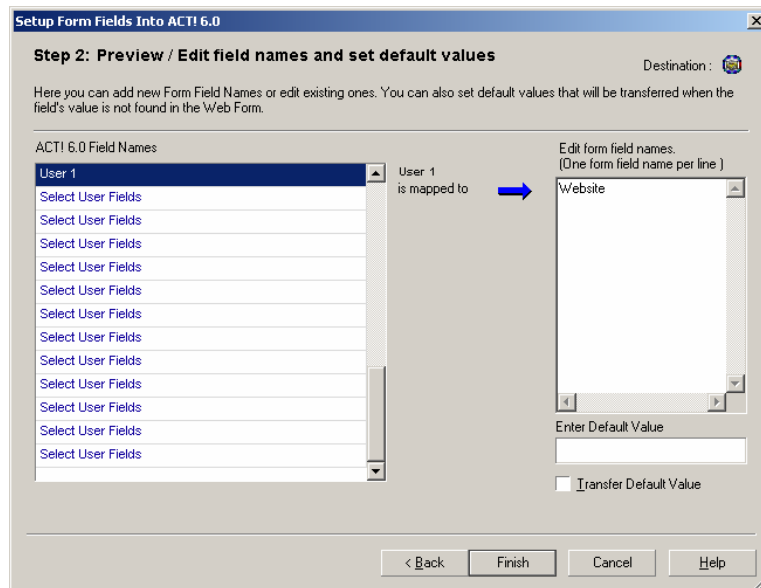


Figure 13: Setup form fields for user fields – for ACT!

- Under Field names, click and select the user field name. Enter the corresponding form tag under **Edit form field names**.
- **Enter Default Value:** Enter the default value to be assigned to the selected field.
- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish**.

2.5.2. Use - Text Removal

You can remove unwanted characters and text from the web Form.

- Click **Text Removal** to open Text Removal dialog box.
- Enter the text you want to remove.
- Click **OK**.



Figure 14: Text Removal

Example:

If your web form contains text “INC”, enter the text in the Text Removal dialog box. When you transfer addresses to your destination application the text “INC” is ignored.

Make case sensitive: Select this option to make the search case sensitive. Text that exactly matches the case alone is ignored.

2.5.3. Use - Add Keywords

You can remove the misinterpreted details while capturing information from web forms.

The Setup Form Fields Wizard guides you to map tags automatically or manually for your web forms.

In exceptional cases, the contact details may be misinterpreted.

To process the addresses accurately, Click **Add Keywords**.

In the **Add Keywords Settings** dialog box that appears, select a field in the left pane and type a keyword for a particular field. You can also enter multiple keywords for identification.

Example:

Mr. Lawrence Reeves, **RAC**
 8675 N.L. 98 Terrace
 Miami FL 33016
 305-826-7777
lreeves@worldnet.att.net

In this case, ‘Lawrence Reeves RAC’ is identified entirely as “Last Name, First Name” in AddressGrabber, whereas ‘RAC’ is the designation.

Using **Add Keywords**, you can map the value ‘RAC’ to the Title field in your destination application.

In the **Add Keywords Settings** dialog box, select the field **Title**, and enter **RAC** in the right pane.

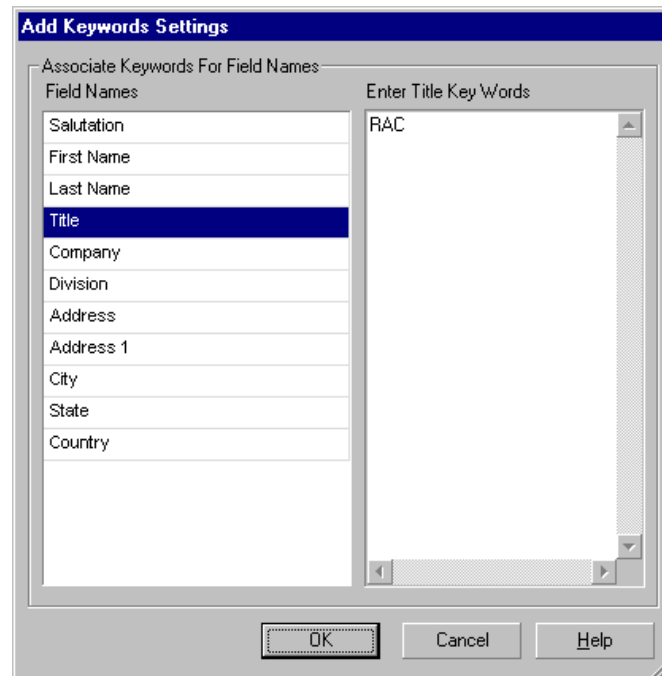


Figure 15: Add Keywords Settings

Click **OK**.

Now the value 'Lawrence Reeves' is transferred to the **Name** field of your destination and 'RAC' to the **Title** field.

2.5.4. Remove E-mail Header Before Extraction

Select this option to remove the email header information like Date, time, Sender address, etc. that appears in a web form.

2.6. Format Options

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

Click **Format** to setup to format the following options:

2.6.1. Format Contact Fields

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

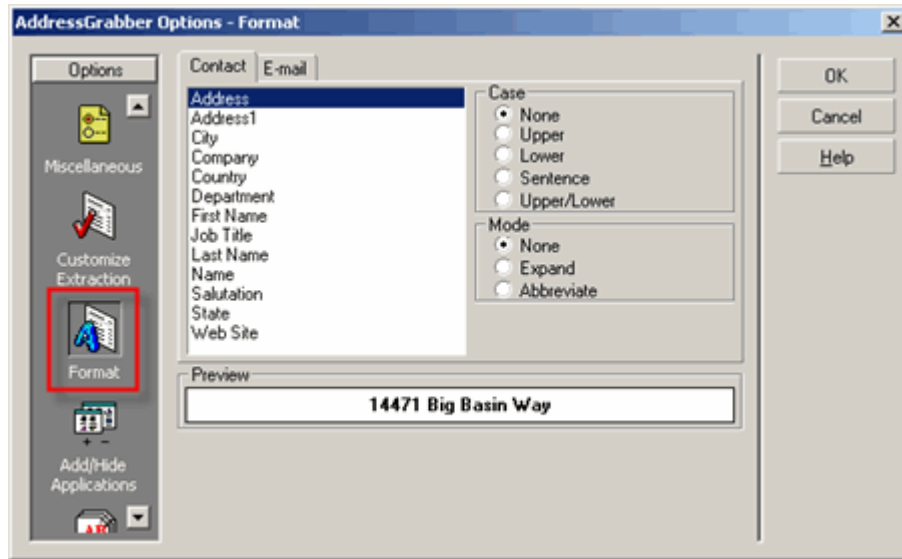



Figure 16: Format Contact Fields

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

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

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

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

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

The text is formatted as shown in the table:

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

Click **OK** to save settings.

2.6.2. Format E-mail field

Click the **E-mail** tab

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

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

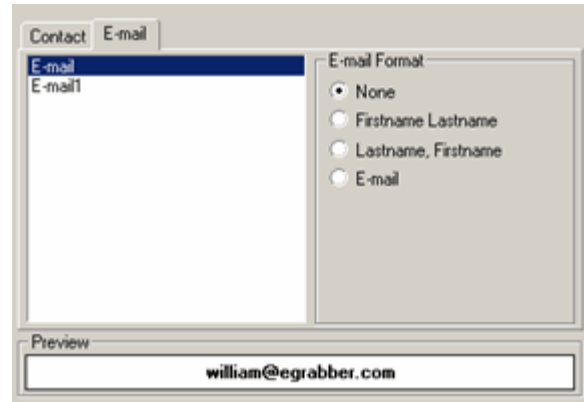


Figure 17: Format Email field

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

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

Example: If the first name is "William" and last name is "Stevenson" then the e-mail address is assigned as "William Stevenson <william@egrabber.com>".

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

Example: If the transferred name is "William Stevenson" then the e-mail address is assigned as "Stevenson William <william@egrabber.com>".

E-mail: Transfers only the e-mail ID to your destination. **Example:** <<william@egrabber.com>>.

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

2.7. Add / Hide Applications

At the time of installation, AddressGrabber automatically detects the applications available in your System and displays them in the AddressGrabber Toolbar.

You can use the **Add / Hide Applications** window to detect the applications after the installation of AddressGrabber. You can also add or hide the application icons displayed in the toolbar.

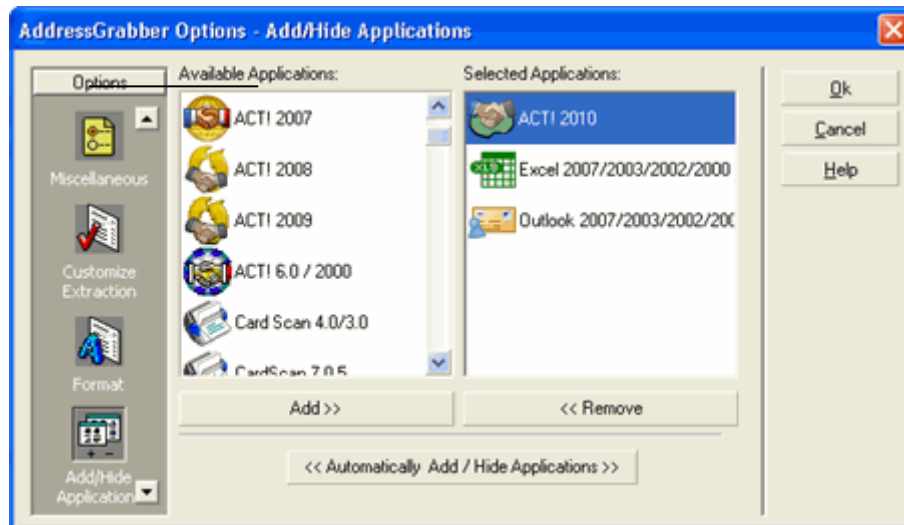


Figure 18: Add/ Hide Applications

Click **<<Automatically Add/Hide Applications>>** to automatically detect the applications installed in your system.

To add an application icon to the toolbar, select the application under **Available Applications** and click **Add>>**.

To remove an application icon from the toolbar, select the application under **Selected Applications** and click **<<Remove**.

Click **OK** to save the settings.

2.8. My Address – Save your personal details

Click **My Address** to save your personal details. This option already contains the information you have entered during installation. You can use this information as return address for correspondence.

You can edit the details and add more addresses in the **My Address** window.

You can select **My Address** as Source in the AddressGrabber toolbar and transfer the addresses to any destination.

- Click **New** to create a new address.
- Enter the details.
- Click **Save** to save the details.
- Click **Delete** to remove an address.

The screenshot shows the 'AddressGrabber Options - My Address' dialog box. It features a left-hand sidebar with several icons: 'Options', 'Customize Extraction', 'Format', 'Add/Hide Applications', and 'My Address'. The 'My Address' icon is highlighted with a red rectangular box. The main area of the dialog is divided into two columns: 'Personal' and 'Address'. The 'Personal' column contains text boxes for 'First Name' (filled with 'William'), 'Last Name' (filled with 'Stevenson'), 'Job Title' (filled with 'Sales Manager'), 'Company' (filled with 'eGrabber Inc.'), 'Phone', 'Fax', 'Mobile', and 'Pager'. The 'Address' column contains text boxes for 'Address' (filled with '14471 Big Basin Way'), 'Suite E', 'City' (filled with 'Saratoga'), 'State' (filled with 'CA'), 'Zip' (filled with '95070'), 'Country' (filled with 'USA'), 'E-mail' (filled with '"William Stevenson" <sa>'), and 'Web Site' (filled with 'www.egrabber.com'). At the bottom of the dialog, there are three buttons: 'New', 'Save', and 'Delete'. Below these buttons, there is a checkbox labeled 'Set this address as default' which is currently unchecked, and a 'Select Contact' dropdown menu showing 'William Stevenson'.

Figure 19: My Address

You can select a contact from the **Select Contact** list to view the corresponding details.

Select **Set this address as default** to make the currently selected address as default while transferring to destination applications.

3. AddressGrabber Parse Result Window

When you transfer contact information, the AddressGrabber Parse Result Window appears displaying the extracted contact details from the source text. You can verify and edit the extracted information and then transfer the data to your destination.

The AddressGrabber Parse Result Window contains the following tabs:

The screenshot shows the 'AddressGrabber Parse Result' window with the following data:

Salutation	First Name	Last Name	Destination
	William	Stevenson	

Below the header are tabs: **Contact** | User Fields | Activity | Format

Company	eGrabber Inc.	Phone		Ext	
Job Title	Sales Manager	Phone1		Ext	
Dept.		Fax			
Address	14471 Big Basin Way	Mobile			
	Suite E	Pager			
City	Saratoga	E-mail	sales@egrabber.com		
State	CA	E-mail1	william@egrabber.com		
Zip	95070	Country	USA		
		Web Site	www.egrabber.com		

Buttons: Verify Address

Options: Use Form Fields Use Format Options Settings ▾

Notes

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

Buttons: Transfer, Cancel, Parse Again, Help

Figure 20: AddressGrabber Parse Results window

Contact tab

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

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

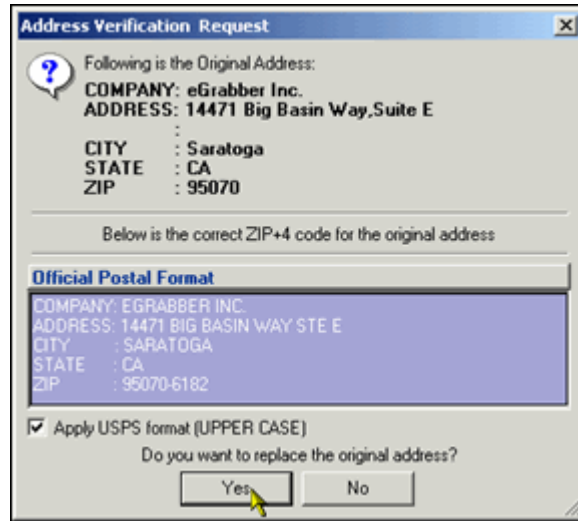


Figure 21: Address Verification - Result

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



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

- ◆ **Use Form Fields:** When you transfer address from a web form, select this option to transfer the mapped web form tags to the corresponding fields in your destination application. Refer to [Chapter 2](#) for more details on mapping web form tags to destination fields.
- ◆ **Use Format Options:** Select/clear this option to apply/not apply the format you have setup.
- ◆ **Settings:** Click here to modify the default settings. When you click here, a menu appears with the following options:
 - **Options:** Opens AddressGrabber Options window. Refer [Chapter 2](#) for more details on Options.
 - **Link Options:** Opens the Link Options window for the selected destination application. You can customize the transfer options according to the selected application.
 - **Hide / Show Processes Page:** To remove or display the Processes tab.
 - **Hide / Show Activities Page:** To remove or display the Activities tab.
 - **Hide / Show Format Page:** To remove or display the Format tab.
 - **Display parse result window:** To show / hide the Address Parse Result window.
- ◆ **Transfer:** Click this option to transfer the contact information to your destination.
- ◆ **Cancel:** Click this option to close the window without transferring the information.
- ◆ **Parse Again:** Click here to capture the information again. You can use this option when you have any changes in the Address Confirmation Window, and you want to revert to the original information.

User Fields tab

Displays default values of user fields you have entered for ACT!, GoldMine, and Outlook.

Refer to [Adding default values to the user fields](#) for more details.

Processes tab


Displays Processes attached to the contact while transferring to GoldMine. You can also attach new processes in this tab.

Activities tab

Displays Activities attached to the contact while transferring to ACT! or GoldMine. You can add, edit or delete the activities in this tab.

Format tab

Click this tab to format the values of the Contact and Email fields in the address. The same options are also available in the [Format Options](#) window. You can setup to format all the addresses being transferred by using the **Format Options**. If you want to change the format for a specific address, use the **Format** tab in the **Confirmation** Window.

 The Contact tab and the Format tab are displayed for all the applications. The other tabs are displayed or hidden according to the selected destination application.

User Fields tab: Displayed for ACT!, GoldMine, and Outlook.

Processes tab: Displayed for GoldMine.

Activities tab: Displayed for ACT!, GoldMine and Outlook.

4. Check for Duplicates

You can check for duplicate information while transferring to database applications like ACT!, GoldMine, and Outlook.

Right click the destination icon in the toolbar and select **Link Options**.

In the **Link Options** window, click the **Transfer Setup** or the **Duplicate Check** tab.

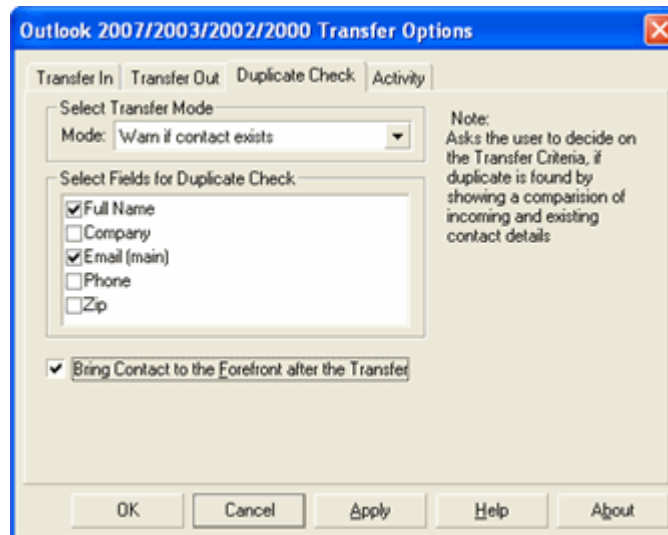


Figure 22: Check for duplicates – Outlook

Under **Select Transfer Mode**,

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

Example:

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

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

Example:

Incoming Candidate Address	Existing Candidate Address	Transfer Mechanism
William Stevenson 14470, Big Basin Way, Saratoga, CA 95070, USA	William Stevenson 14471, Big Basin Way, Saratoga, CA 95071, USA	The existing contact is updated with the incoming contact.

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

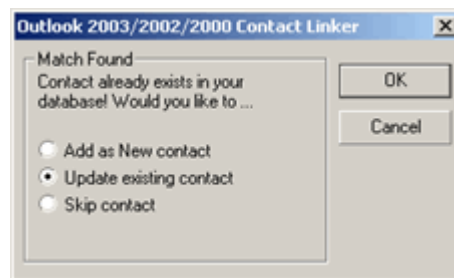



Figure 23: Contact Linker - Outlook

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

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

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

When you select any of the above options except **Always add as new contact**, the fields under **Select Fields for Duplicate Check** are made available. Select a single field or multiple fields to check for duplicate values.

The values of the selected fields are checked while transfer and if the data is already found in the destination application, then the duplicate record is handled according to the selected transfer mode.

Example for Duplicate Check: Set the Option “Warn if Contact Exists “ and select the fields “Name” & “E-mail”.

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

- **Bring Contact to the forefront after the transfer:** Select this option to view the transferred Contact.

Click **OK**.



The tab to check for duplicates appears as either **Transfer Setup** or **Duplicate Check**, according to the selected destination application.

5. Transfer using Contact Managers

You can transfer addresses using the Contact Managers like ACT!, GoldMine and Outlook. You can also setup the transfer options according to your requirements.

5.1. ACT!

You can transfer contact information using the following versions of ACT!.

- ACT! 2010 / 2009 / 2008 / 2007 / 2006 / 2005 / 2000 (6.0)


You can use ACT! as both source and destination.

5.1.1. Setup Transfer Options for ACT!

You can setup the following transfer options for ACT! using the **Link Options**.

- Setup to transfer from or to different address sections, i.e., Home /Business / Both.
- Setup Form tags while transferring from web forms.
- Check for Duplicates.
- Schedule Activities for transferred contact.

Right click the ACT! Icon in the toolbar and select **Link Options** to setup ACT!

 If the ACT! Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Login

When you select ACT! 2010 / 2009 / 2008 / 2007 / 2006 / 2005 / 2000 (6.0) as destination, you need to login to the database to ensure accurate transfer of data.

- In the **Link Options** window, click the **Login** tab.

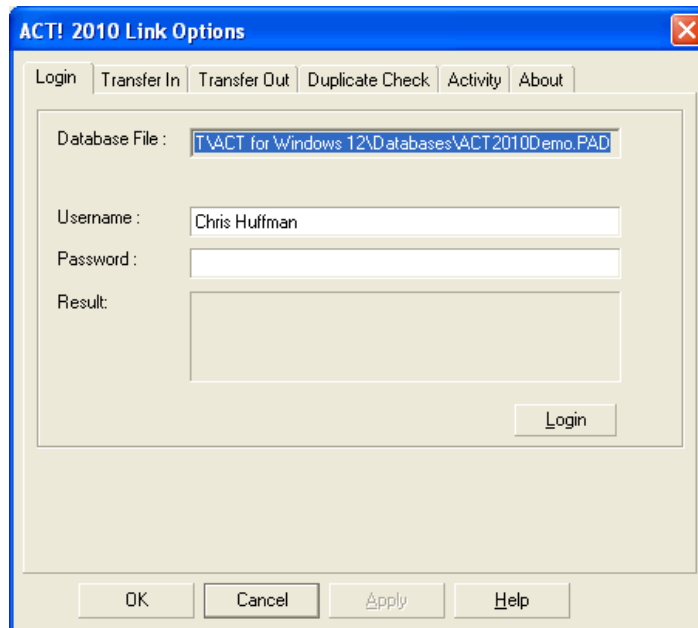



Figure 24: Login to ACT!

- Enter ACT! database login details.
 - **Database Path:** Name and path of the currently opened database is displayed.
 - **User Name:** Enter the login name of your ACT! database.
 - **Password:** Enter the ACT! database password.
- Click **Login**.
- The message **Login Successful** is displayed.
- Click **Apply**.

 In ACT! 2010 / 2009 / 2008 / 2007, Transfer of addresses is not possible in the following cases:

- ◆ If the security level for the user in ACT! 2010 / 2009 / 2008 / 2007 has been set as Browse.
- ◆ If the login access for the user has been set as Inactive.
- ◆ If the user has upgraded from previous version of ACT! and not converted the database from previous version to latest version of ACT!.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.

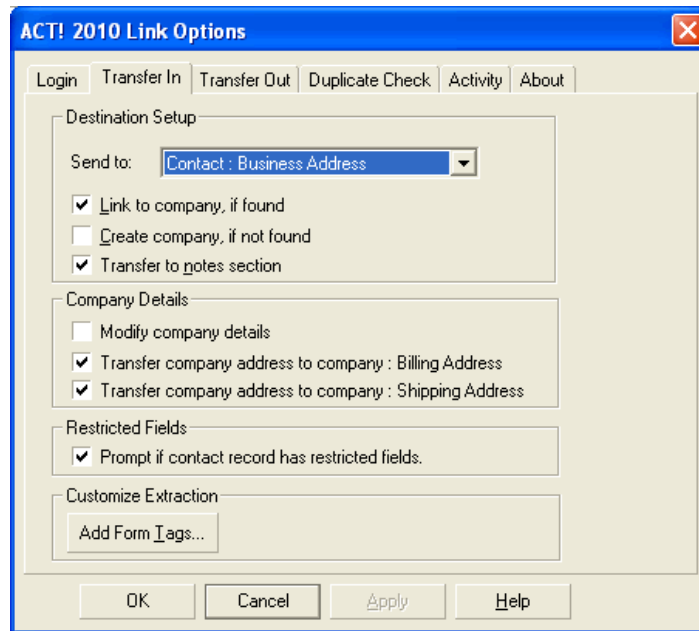


Figure 25: Setup Transfer In - ACT!

Under Destination Setup:

- From the **Send To:** list select,
 - ◆ **Contact: Business Address** to add the contact information as the contact's primary address. This option is selected by default.
 - ◆ **Contact: Home Address** to transfer the contact information in the 'Home Address' tab of ACT contact record.
 - ◆ **Contact: Business and Home Address** to transfer the contact information to both the primary address and the 'Home Address' section of ACT!.

The following options are available in addition for ACT! 2010/2009/2008/2007/2006/2005.

- Select **Link to Company, if found** option if you want the contact record to be linked to existing company in ACT!
- Select **Create Company, if not found** to create a new company record in ACT! and link the contact information that is being transferred to that company.
- Select **Transfer to Notes section** to add the contact record in the 'Notes' of ACT!.

Under Company Details:

- Select **Modify Company Details** to update the existing company record in ACT! with the new record being transferred.
- Select **Transfer Company Address to Company: Billing Address** and / or **Transfer Company Address to Company: Shipping Address** if you want the address to be transferred to the appropriate sections in the 'Address' tab of ACT! company record.

Under Customize Extraction,:

- Click **Add Form Tags...** to map the form tags while transferring data from a web form.



In ACT! 6.0/2000, you can find the **Add Form tags** option in the Transfer Setup tab.

Refer to [Chapter 2](#) for more details on mapping web form tags.

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

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

Click **OK** to save the settings.

Setup to Transfer Out

In the **Link Options** window, click the **Transfer Out** tab.

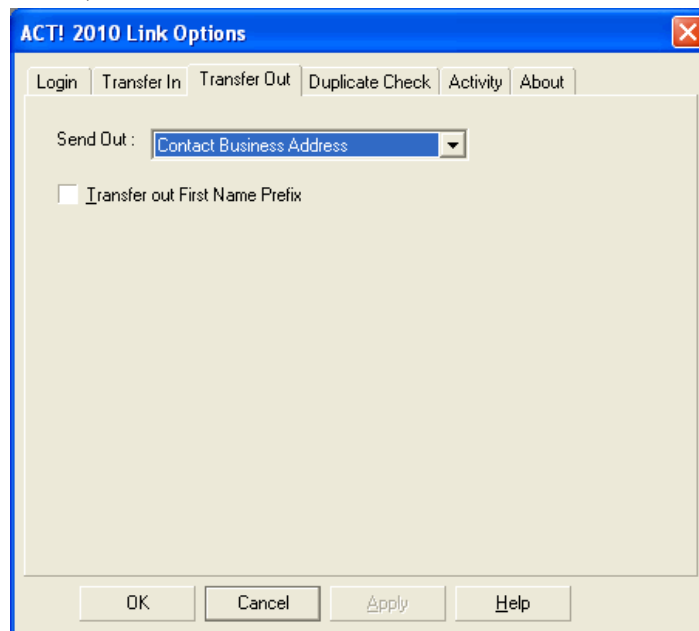



Figure 26: Setup Transfer Out - ACT!

- From the **Send To:** list select,
 - ◆ **Contact: Business Address** to transfer contact information from the Business Section. This option is selected by default.
 - ◆ **Contact: Home Address** to transfer the contact information from the Home Section.

- **Transfer out First Name Prefix:** Select this option to transfer the details in the salutation field. Use this option to create form letters, mailing labels, envelopes, or catalogs using mail merge in [Microsoft Word](#).

 In ACT! 6.0 / 2000, the above option is displayed as **Transfer out Salutation Field**.

Setup to check for duplicates

In the **Link Options** window, click the **Duplicate Check** tab.

Select the Transfer Mode and the fields to be checked for duplicates.

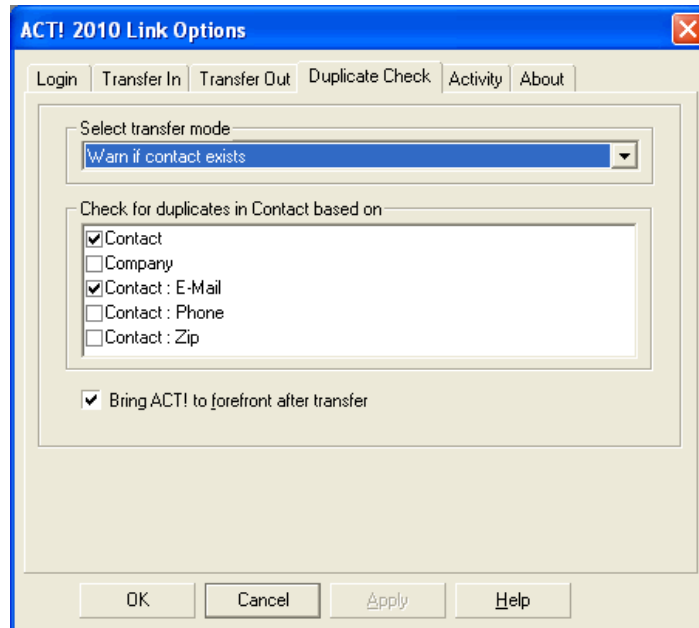



Figure 27: Setup Duplicate Check - ACT!

Refer to [Chapter 4](#) for more details about the Duplicate Check.

 In ACT! 6.0/2000, the duplicate check options are available under the **Transfer Setup** tab. You can also find the **Add Form tags** option in this tab to map the form tags.

Setup to Schedule Activity

You can attach, schedule and prioritize activities like "Calls, Meetings, Appointments" for the contacts transferred to ACT!. The activity created and scheduled for the transferred contact is displayed in the Activity tab of the contact in ACT!. You can attach activities for a single or multiple contact(s).

In the **Link Options** window, click the **Activity** tab.

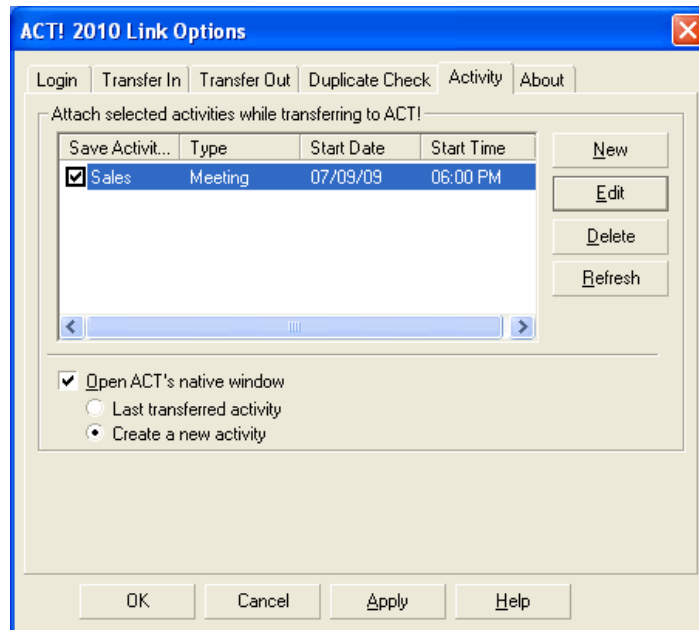


Figure 28: Activity Setup - ACT!

To create a new activity:

Click **New**. In the **Activity Settings** window, enter the following settings:

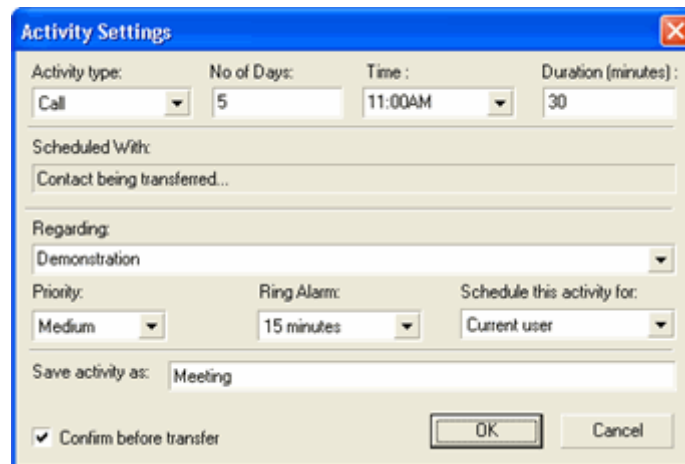


Figure 29: Create a New Activity in ACT!

Activity type: Select an activity "Call", "Meeting", or "To-do" from the list.

No of Days: Enter the number of days counting from the present day when you want to perform the activity. For **Example**, if you type 5 days then it executes the activity on the 5th day counting from the present day.

Time: Enter the time to perform the activity. The current system time is displayed by default. 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 you want the activity to last. For **Example**, if your calls last for 30 minutes, then type 30 in the Duration box.

Scheduled With: The name of the contact to which you have attached and scheduled the activity is displayed when you transfer records to ACT!.

Regarding: Select a description for the activity from this list.

Priority: Select **High**, **Medium** or **Low** from the list to prioritize your activity.

Ring alarm: Set an alarm to remind you of a scheduled activity. Select a time from the list. For **Example:** If you select 30 minutes from this list, the alarm displays an alert message 30 minutes before the time at which the activity has been scheduled.

Save activity as: Enter a name to save the activity.

Confirm before transfer: Select this option to view the scheduled activity when the contact information is transferred to ACT!

Schedule this activity for: This option is available for ACT! 2010 / 2009 / 2008 / 2007 only. The existing database user names are displayed in this drop-down list. You can select the user name from this list. The activity is attached to the selected user name.

Click **OK** to save the settings.



The name of the activity is displayed under **Attach selected activities while transferring to ACT!**. You can create more activities by repeating the above steps. You can **select/clear** the activity names to activate/deactivate the process during transfer of addresses.

To edit an activity:

- Select the activity displayed under Attach selected activities while transferring to ACT!
- Click **Edit** and make changes in the Activity Settings.
- Click **OK**.

To delete an activity:

- Select the activity displayed Attach selected activities while transferring to ACT!
- Click **Delete**.
- Click **OK**.

Click **Refresh** to reflect any changes made in activity schedule.

Open ACT's native window: Select this option to display **Schedule Activity** window when the information is transferred to ACT!

- **Last transferred activity:** Select this option to view **Schedule Activity** window with the activity you have setup in the Activity tab. You can modify the settings before transferring to the application.
- **Create a new activity:** Select this option to schedule a new activity in the **Schedule Activity** window.

Click **OK** to save the settings.



You can schedule activities in the same method for ACT! 2006 / 2005 / 2000 (6.0)

5.1.2. Transfer from ACT!

You can transfer contacts from ACT! and the e-mail client to any destination application.

- Open ACT! and select the contact record to be transferred.
- Ensure that ACT! icon is selected as Source in the AddressGrabber toolbar

- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

5.1.3. Transfer into ACT!

You can transfer the contact as:

- New individual contact
- New company contact

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the ACT! Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into ACT! into the Business / Home / Both the sections according to the option you have setup in the **Transfer In** tab.



Ensure that ACT! is open.

5.2. GoldMine

You can transfer addresses using the following versions of GoldMine.

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

You can use GoldMine as both source and destination.

5.2.1. Setup Transfer Options for GoldMine

You can setup the following transfer options for GoldMine using the **Link Options**.

- Setup Form tags while transferring from web forms.
- Check for Duplicates.
- Schedule Processes
- Schedule Activities for transferred contact.

Right click the GoldMine Icon in the toolbar and select **Link Options** to setup GoldMine. A setup wizard opens and guides you through the setup process.



If the GoldMine Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Login

As you click **Link Options**, the **login** window appears.

Figure 30: Login to GoldMine

Click **Get GoldMine Details** and the following details are retrieved automatically:

- **System Directory:** Displays the location and path of your GoldMine application.
- **GoldMine Directory:** Displays the location and path of your calendar database.
- **Common Directory:** The common Directory option automatically locates your database of GoldMine you are currently accessing.
- **Username:** The username of GoldMine database is displayed here.

Password: Enter your GoldMine database password and click **Login**.

The message **Logged in successfully** appears in the Status area.

Click **Next**.

Setup to check for Duplicates

In **Transfer Setup** window select the transfer mode and fields to be checked for duplicates.

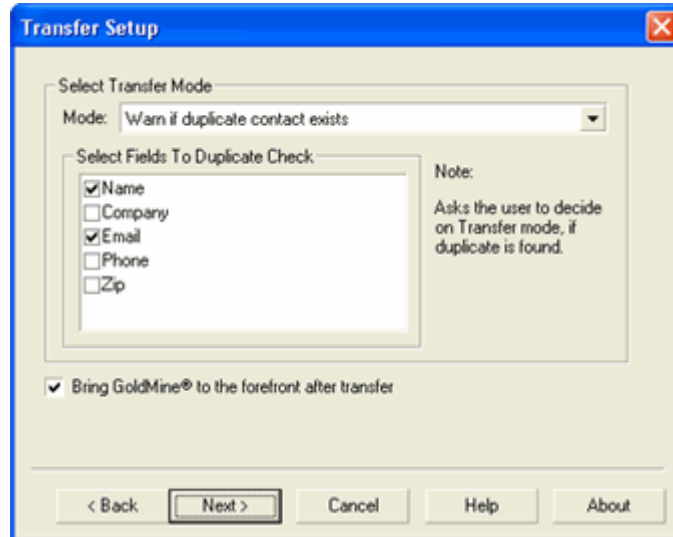


Figure 31: Duplicate Check – GoldMine

Refer to [Chapter 4](#) for more details about the Duplicate Check.

Setup to Transfer In

Here you can customize settings to automatically attach Phone/Fax area codes, attach notes to a contact, add map tags and set default values while transferring web forms to your database.

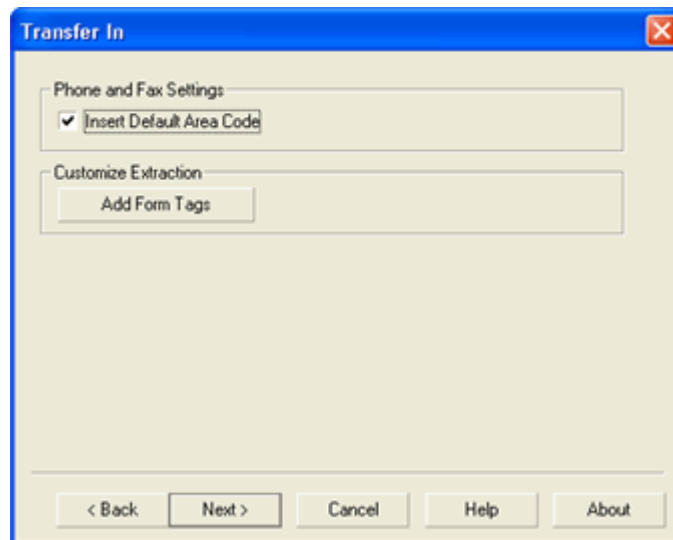


Figure 32: Setup to Transfer In – GoldMine

Select	To do ...
Insert Default Area Code	Automatically pick up the missing area code of Phone and Fax if available in the source application.
Add Form Tags	Map the web form tags to the fields available in GoldMine. Refer to Chapter 2 for more details on mapping web form tags.
Transfer to Notes section	Transfer the original text of the captured information to the notes section in GoldMine for future reference.

After selecting the required options, click **Next**.

Attach Processes in GoldMine

You can attach processes follow up the contact.

In the Processes window, select **Attach Process after transferring records to GoldMine®** to enable the list of processes.

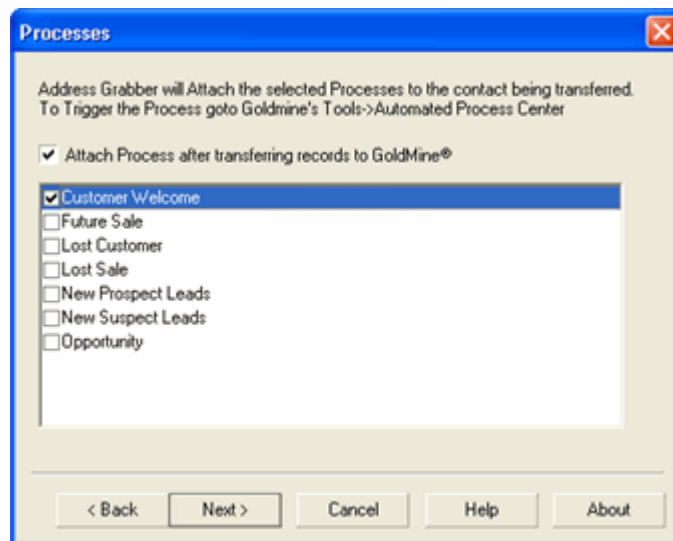



Figure 33: Attach processes to GoldMine

Select the process to be attached for a contact.

After the transfer, the process is triggered to a contact and is attached in the Tracks tab of GoldMine database.

Click **Next**.

 To schedule processes, you must have the **Schedule rights** option enabled in GoldMine > File > Configure > User's Settings.

Schedule activities to a contact

In the Activities window, you can create an activity and attach to a contact.

Click **New** and select the type of activity to be scheduled.

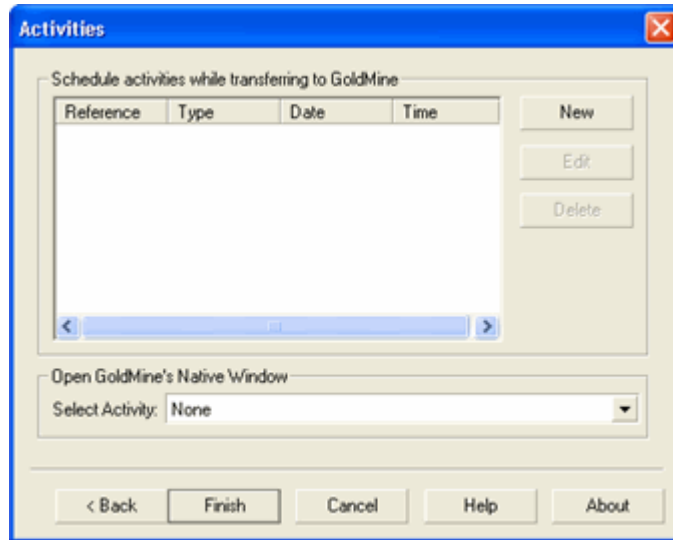


Figure 34: Attach Activities to a contact

The following activities are available:

Activity	Description
Call	To schedule call for a contact in the future.
Next Action	To schedule manual tasks, such as sending literature, delivering samples and shipping products etc.
Appointment	To schedule, date-specific meetings with contacts. Appointments can also be used to schedule conference calls.
Literature Request	To schedule fulfillment and shipping of brochures, price lists and other types of mass-printed documentation to contacts.
Forecasted Sale	To schedule activities indicating the anticipated close date of a pending sale with one of your contacts.
Other Action	To schedule miscellaneous activities that fall outside the other activity categories defined in GoldMine.
To-do	To prioritize the activities that do not have an activity date and appear on a separate To-do list, rather than the date-based Scheduled Activities windows.
Event	To have date-specific activities scheduled for one or more days, such as conferences and conventions.

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

To edit an activity, select the activity from the list and click **Edit**.

To delete an activity, select the activity from the list and click **Delete**.

Open GoldMine's Native window: Select this option to display **Schedule Activity** window when the information is transferred to GoldMine.

Select the required activity from **Select Activity** list. While transferring a contact, the selected activity window appears in GoldMine. You can edit the settings for the activity and then transfer the details into Goldmine.

After creating the required activities, click **Finish**.

Now you can transfer addresses from or into GoldMine.

5.2.2. Transfer from GoldMine

You can transfer contacts from GoldMine into any destination application.

- Open GoldMine and select the contact record to be transferred.
- Ensure that GoldMine is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

5.2.3. Transfer into GoldMine

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the GoldMine Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into GoldMine database.



Ensure that GoldMine is open.

5.3. Outlook

You can transfer addresses using the following versions of Outlook.

- Outlook 2007/2003/2002/2000


You can use Outlook as both source and destination.

5.3.1. Setup Transfer Options for Outlook

You can setup the following transfer options for Outlook using the **Link Options**.

- Setup to transfer from or to different address sections, i.e., Home /Business / Both.
- Setup Form tags while transferring from web forms.
- Check for Duplicates.
- Schedule Activities for transferred contact.

Right click the Outlook Icon in the toolbar and select **Link Options** to setup Outlook.

 If the Outlook Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.

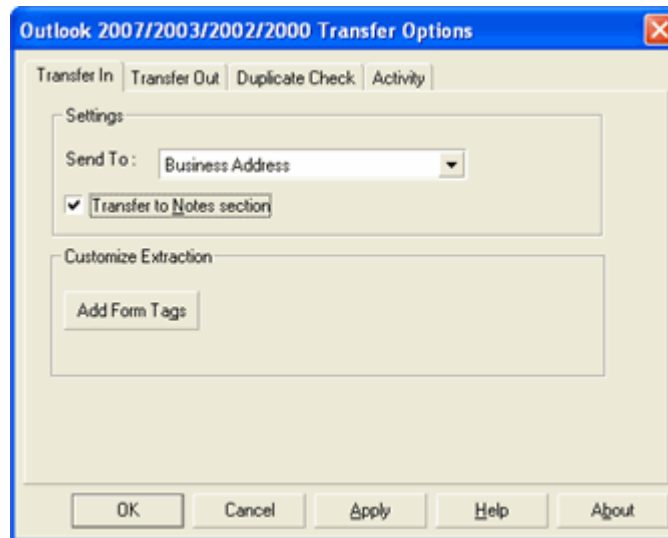


Figure 35: Outlook - Transfer In Setup

Under Settings:

- From the **Send To:** list select,
 - ◆ **Business Address** to transfer the contact information as the primary address. This option is selected by default.
 - ◆ **Home Address** to transfer the contact information in the 'Home Address' tab
 - ◆ **Both Addresses** to transfer the contact information to both the primary address and the 'Home Address' section.
- **Transfer to Notes section:** Select this option to add the contact record to the '**Notes**' section.

Under Customize Extraction,:

- Click **Add Form Tags...** to map the form tags while transferring data from a web form.

Refer to [Chapter 2](#) for more details on mapping web form tags.

Click **OK** to save the settings.

Setup to Transfer Out

In the **Link Options** window, click the **Transfer Out** tab.

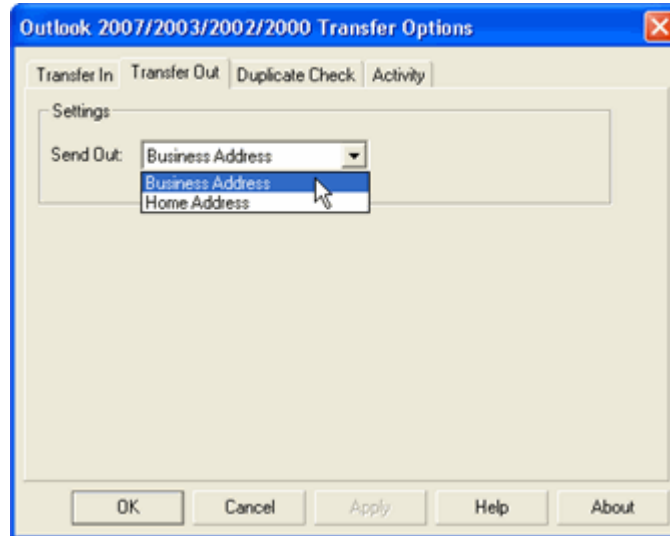


Figure 36: Outlook – Transfer Out Setup

- From the **Send Out:** list select,
 - ◆ **Business Address** to transfer contact information from the Business Section. This option is selected by default.
 - ◆ **Home Address** to transfer the contact information from the Home Section.
- Click **OK**.

Setup to check for duplicates

In the **Link Options** window, click the **Duplicate Check** tab.

Select the Transfer Mode and the fields to be checked for duplicates.

Refer to [Chapter 4](#) for more details about the Duplicate Check.

Setup to Schedule Activity

You can attach, schedule and prioritize activities like " Appointments, Task, Journal" for the contacts transferred to Outlook. The activity created and scheduled for the transferred contact is displayed in the Activity tab of the contact in Outlook.

In the **Link Options** window, click the **Activity** tab.

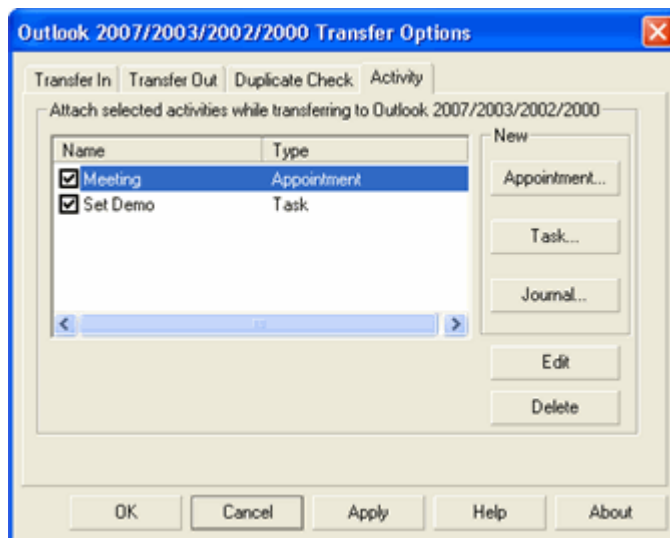


Figure 37: Schedule Activity - Outlook

Schedule Appointments, Journals and Tasks

You can attach and schedule Appointments, Tasks, and Journal Entries for the contacts transferred to your application. The activity created and scheduled for the transferred contact is displayed in the **Activity** tab of the contact in Outlook.

Click the **Appointment**, **Task**, or the **Journal** buttons to create new activities.

The name of the activity is displayed under **Attach selected activities while transferring to Outlook 2007/2003/2002/2000**. You can create more activities by repeating the above steps. You can select/clear the activity names to activate/deactivate the process during transfer of addresses.

As you transfer records to Outlook, this activity is attached and is scheduled displaying the name of the transferred contact under Contacts.

To edit an activity:

- Select the activity displayed under **Attach selected activities while transferring to Outlook 2007/2003/2002/2000**.
- Click **Edit** and make changes in the Settings.
- Click **OK**.

To delete an activity:

- Select the activity.
- Click **Delete**.
- Click **OK**.

5.3.2. Transfer from Outlook

You can transfer contacts from Outlook Address Book or from Outlook email into any destination application.

- Open Outlook Address Book or email and select the contact record to be transferred.
- Ensure that Outlook is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.

- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option “Both addresses” in the **Transfer In** tab of the destination **Link Options**.

5.3.3. Transfer into Outlook

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Outlook Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into Outlook Address Book.



Ensure that Outlook is open.

6. Transfer using Accounting Packages

You can transfer addresses using the Accounting Packages like QuickBooks. You can also setup the transfer options according to your requirements.

6.1. QuickBooks

You can transfer addresses using the following versions of QuickBooks.

- QuickBooks Enterprise 2009 / 2008 / 2007 / 2006
- QuickBooks Premier 2009 / 2008 / 2007 / 2006
- QuickBooks Pro 2009 / 2008 / 2007 / 2006

You can use QuickBooks as both source and destination.

6.1.1. Setup Transfer Options for QuickBooks

You can setup AddressGrabber to transfer addresses to Customer: Jobs, Vendors, Employees, and Other Names in QuickBooks Premier. You can also transfer addresses from Invoices, Purchase Orders, Sales/Receipts, Estimates, Credit Memos/ Refunds, Writer Checks and Sales Order.

Right click the **QuickBooks** Icon in the toolbar and select **Link Options**.



If the **QuickBooks** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.



Figure 38: QuickBooks Premier – Transfer In tab

- **Send To:** Select the list to which the address to be transferred. The available options are:
 - Customer: Jobs
 - Vendors
 - Employees
 - Other Names
- **List by:** Select the option by which the address to be referred in QuickBooks. The available options are:
 - First Name Last Name
 - Last Name First Name
 - Company.
- **Address Type:** Select the type of address. The available options are:
 - Bill To
 - Ship To
 - Both
- **Open Transferred Address:** Select this option open the QuickBooks in Edit mode after the transfer.
- Click **OK**.

Setup to Transfer Out

In the **Link Options** window, click the **Transfer Out** tab.

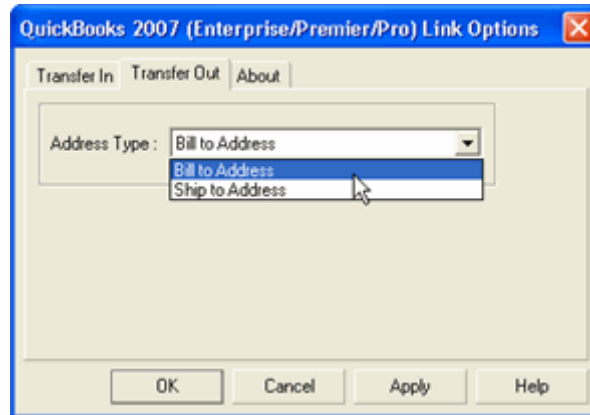


Figure 39: QuickBooks – Transfer Out tab

- **Address type:** Select the address section from which the address is to be transferred. The available options are:
 - Ship To
 - Bill To
- **Show message during transfer:** Select this option to display alerts for procedures when you transfer from Purchase Orders, Invoices, Estimates, Cash Sales, Credit Memos/ Refunds, Write Checks and Sales Order.
- Click **OK**.

6.1.2. Transfer from QuickBooks

You can transfer contacts from QuickBooks into any destination application.

- Open QuickBooks and select the contact record to be transferred. Double-click to open the address.
- Ensure that QuickBooks is selected as Source in the AddressGrabber toolbar.
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.




If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option “Both addresses” in the **Transfer In** tab of the destination **Link Options**.

6.1.3. Transfer into QuickBooks

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the QuickBooks Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.

- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into QuickBooks.

 Ensure that QuickBooks is open.

Check for Duplicates

AddressGrabber checks for duplicate record based on the name of the contact record being transferred. When a duplicate record is found, the **List Duplicates** window appears with the following options:

- **Field Name:** The contact fields in QuickBooks Pro are displayed.
- **Existing Field Values:** Existing contact field values are displayed.
- **Incoming Field Values (New):** The values in the contact being transferred. You can edit the data in this column
- **Select:** Select **ACCEPT** in this column to save the changes made in the **Incoming Field Values (New)** column.

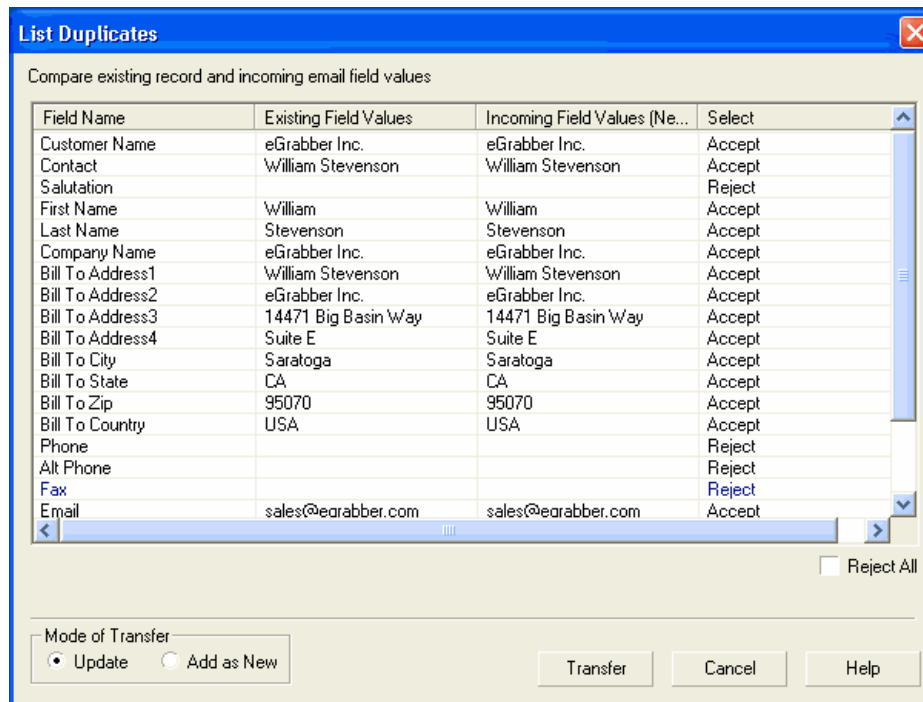



Figure 40: List Duplicates

- **Reject All:** Select this option to cancel the changes.
- **Update:** Select this option to update the existing record.
- **Add as New:** Select this option to add the contact as a new record.

 If you select **Add as New**, edit the duplicate data in **Incoming Field Values (New)**. You cannot transfer an identical record.

- Click **Transfer**.

7. Transfer using Shipping Packages

You can transfer addresses using the Shipping Packages like FedEx.

7.1. FedEx

You can transfer contact information using the following versions of FedEx.

- FedEx Ship Manager QuickShip 5.2
- FedEx Ship Manager

You can use FedEx as destination only.

7.1.1. Transfer into FedEx

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the FedEx Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.

The Contact is transferred into FedEx.

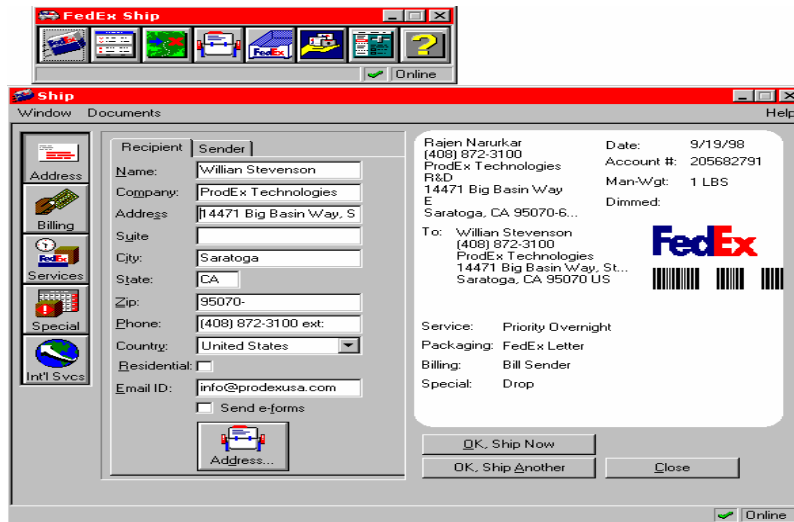


Figure 41: Address created in FedEx

 Ensure that FedEx is open.

8. Transfer using E-mail Clients

You can transfer addresses using E-mail Clients such as Outlook and Outlook Express.

8.1. Outlook Express

You can transfer addresses using the following versions of Outlook Express.


- Outlook Express 5.0/ 4.72/ 4.71

You can use Outlook Express as both source and destination.

8.1.1. Setup Transfer Options for Outlook Express

You can setup to transfer addresses to different sections in Outlook Express.

Right click the **Outlook Express** icon in the toolbar and select **Link Options**.

 If the Outlook Express Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.

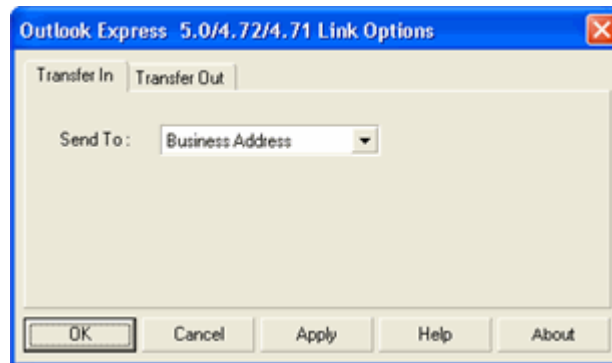


Figure 42: Outlook Express – Transfer In tab

- From the **Send To:** list select,
 - ◆ **Business Address** to transfer the contact information as the primary address.
 - ◆ **Home Address** to transfer the contact information in the 'Home Address' tab.
 - ◆ **Both Addresses** to transfer the contact information to both the primary address and the 'Home Address' section.
- Click **OK**.

Setup to Transfer Out

In the **Link Options** window, click the **Transfer Out** tab.

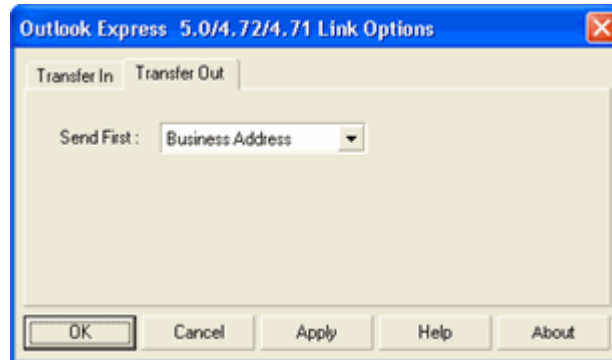


Figure 43: Outlook Express – Transfer Out tab

- From the **Send First:** list select,

- ◆ **Business Address** to transfer contact information from the Business Section. This option is selected by default.
- ◆ **Home Address** to transfer the contact information from the Home Section.

Click **OK**.

8.1.2. Transfer from Outlook Express

You can transfer contacts from Outlook Express Address Book or from Outlook Express email into any destination application.

- Open Outlook Express Address Book or email and select the contact record to be transferred.
- Ensure that Outlook Express is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

8.1.3. Transfer into Outlook Express

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Outlook Express Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into Outlook Express Address Book.



Ensure that Outlook Express is open.

9. Templates

You can create templates to transfer addresses using Clipboard, DYMO Label Software and Microsoft Word.

9.1. Working with Templates

Templates are used to add, modify, or edit settings for the fields you transfer to Clipboard, DYMO Label Software, and Microsoft Word.

Right click the **Destination** Icon in the toolbar and select **Link Options**.

In the **Link Options** window of the selected application, Click **Edit**.

You can create, edit, and delete templates here.

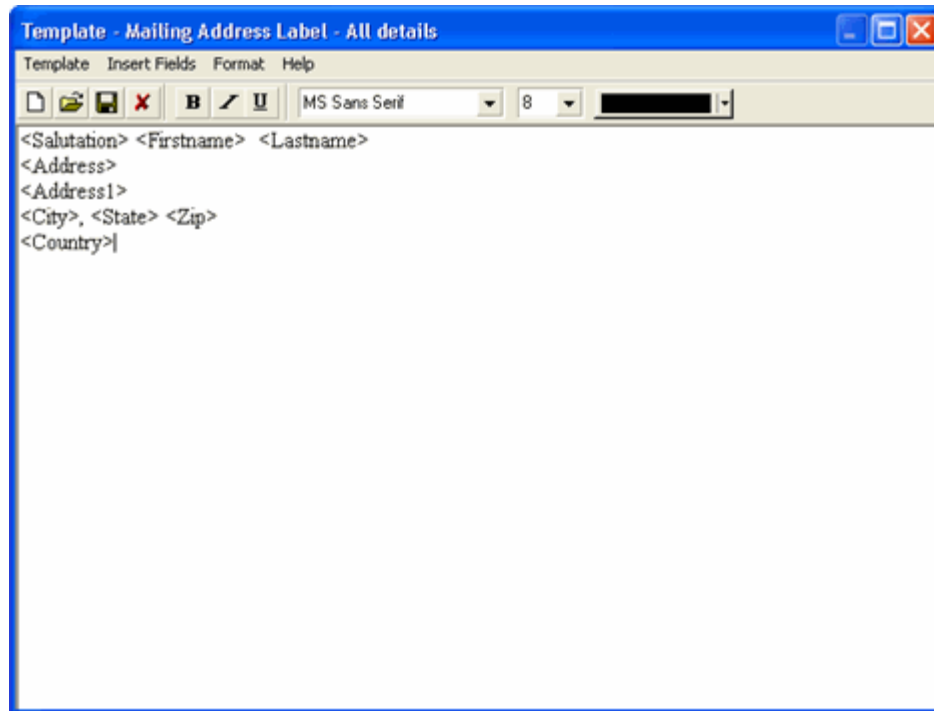


Figure 44: Template

Menu Options in Template

Template Menu

- **New:** Create a new template.
- **Open:** Open an existing template.
- **Delete:** Delete the template.
- **Save:** Save the template.
- **Save As:** Save the template in other name.
- **Exit:** Close the template window

Insert Fields menu

- <Firstname> <Lastname> <Jobtitle> <Department> <Company> <Address1> <Address2> <City> <State> <Zip> <Country> <E-mail> <E-mail2> <Phone1> <Ext1> <Phone2> <Ext2> <Fax> <Mobile> <Pager> <Web>

Select a field to be included in a new or existing template.

The selected field is automatically inserted in the template.








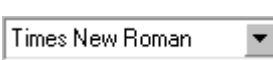


Format menu

- **Word Wrap:** Automatically wraps the fields in the next line instead of a continuous lining of fields.
- **Font:** You can change the font, size of the fields.

Help menu

- **Help:** Displays Help Topics
- **About:** Displays Information about Version of Template.

Toolbar Options in Template

Click...	To do this...
	Create a new template.
	Open an existing template.
	Save the template.
	Delete a template
	Format the text as Bold.
	Format the text as Italics.
	Underline the text.
	Select the font
	Select the font size
	Select the color for template.

Creating a New Template

- Click **Add** in the Template window.
- Enter a name in the **Enter Template Name:** box for the new template
- Enter the format and order of the fields in the **Enter Template Format:** window.
- Click **Save**.
- Click **OK** to close the Template window.

You can use only the following Fields in a Template.

- Firstname
- Lastname
- Salutation
- Job-Title
- Department
- Company
- Address
- Address1
- City
- State
- Zip
- Country
- E-mail
- E-mail1
- Phone
- Ext
- Phone1
- Ext1
- Fax
- Mobile
- Pager
- Web-Site

Figure 45: Template Fields supported

You can rearrange the order of fields.

You can create more number of templates by repeating the above steps.

10. Transfer using Microsoft Office Applications

You can transfer addresses using Microsoft Excel, Microsoft Word, and Word Perfect.

10.1. Microsoft Excel


You can transfer addresses using Excel 2007/2003/2002/2000.

You can use Excel as destination only.

10.1.1. Setup Transfer Options for Excel

You can setup to transfer into a new or existing Excel File.

Right click the **Excel** Icon in the toolbar and select **Link Options**.

 If the **Excel** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

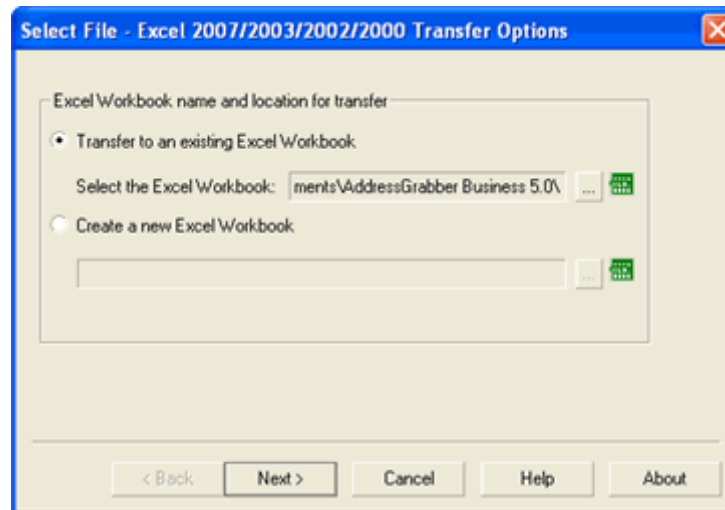



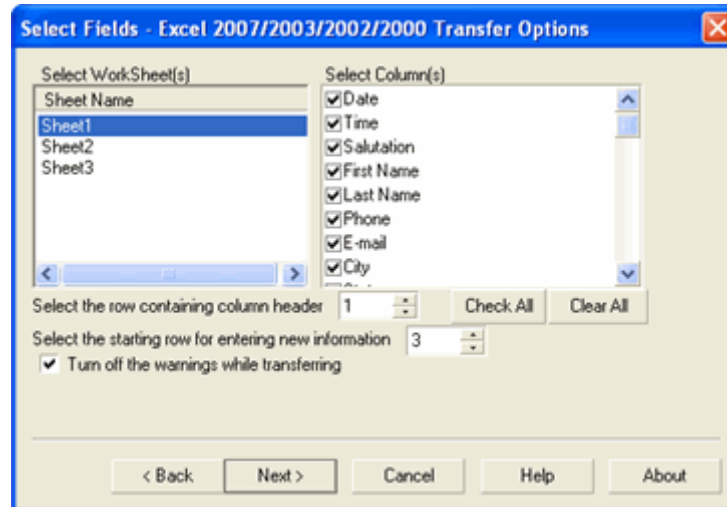
Figure 46: Excel – Select / Create a File

Setup to transfer to an existing Excel file

- **Transfer to an existing Excel Workbook:** Select this option to transfer addresses to an existing Excel file.
- **Select the Excel Workbook:** Click  next to this option to open an existing Excel file.
- Browse and locate your Excel file.
- Select the file and click **Open**.
- Click **Next** to Select Fields in the existing Excel File.

Select Fields in Excel

When you select an existing Excel file and click **Next**, the **Select Fields** dialog box appears where you can select the sheet and column headings.




The left pane displays all the sheets in the file and the right pane displays the column headings available in the selected sheet.

From the left pane, select the sheet(s) to which you want to transfer your records. The first sheet is selected by default.


The column headings present in the first row of the sheet are displayed by default in the right pane.

Select the fields to which you want to transfer the address details.

 You can select multiple sheets from your Excel File. **Example:** Select Sheet1 and select the fields of this sheet in the right panel. To select the next sheet click on Sheet2 and select fields from this sheet. When you select Sheet2, the already selected Sheet1 appears in blue color.

Select the row containing the column header: Select the row number that holds the column headings, if no fields are displayed under Select Column(s).

Select the starting row for entering new information: Select the row number from where you want to insert the transferred records.

 The values of the row numbers can be different for each sheet.
Example: For Sheet1 row numbers can be 3,4 and for Sheet 2 the row numbers can be 2,3.

Check All: Click here to select all the column headings.

Clear: Click here to remove the selection of all the column headings.

Turn off the warnings while transferring: Select this option to hide the warning messages during transfer.

Click **Next**.

To continue with the next step refer to [Map Fields](#).

Setup to transfer to a new Excel File

Create a new Excel Workbook: Select this option to transfer addresses to a new Excel file.

Click  next to this option.

Enter the name of your Excel file.

Click **Save**. A new Excel file is created with the specified name.

Click **Next** to Create Excel Fields.

10.1.2. Create Excel Fields

After creating a new Excel File, you have to create column headings.

By default, three sheets of the new Excel file are displayed in the left pane.

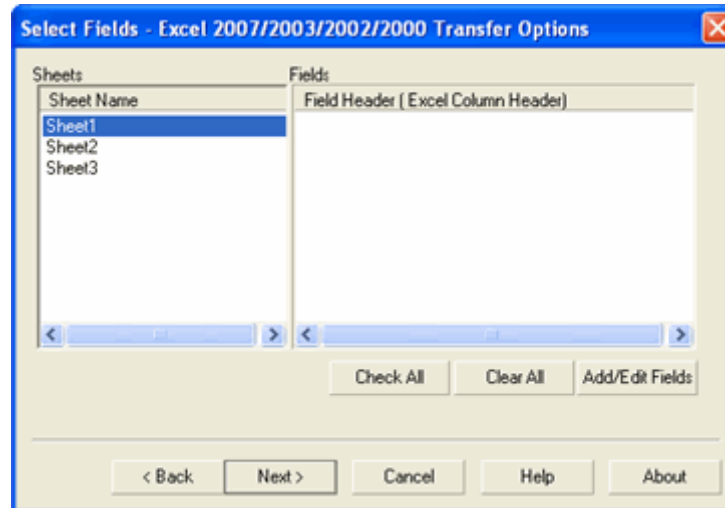


Figure 47: Create Excel Fields

Select a sheet from the list to which you want to transfer your records. The first sheet is selected by default.

Click **Add/Edit Fields** to create column headings for the selected sheet.

Enter your field names in the **Edit Fields** window. You can also edit the fields. Click **OK** to save.

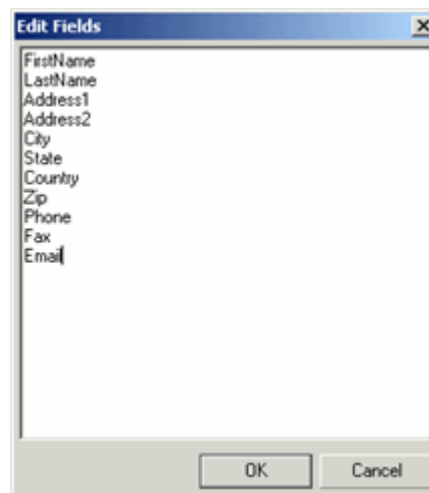


Figure 48: Add / Edit Excel Fields

The field names are displayed under **Fields**.

By default, all the column headings are selected. You can select/clear the fields.


Check All: Click here to select all the column headings.

Clear All: Click here to remove the selection of all the column headings.

Click **Next** to map the fields.

Map Excel Fields

After selecting the excel fields, you can map the fields of your Excel Sheet to the internal fields used by AddressGrabber.

 If you have provided the field names in the Excel file, the same as the internal fields used by AddressGrabber, then the contact field names are automatically mapped with the Excel column headers.

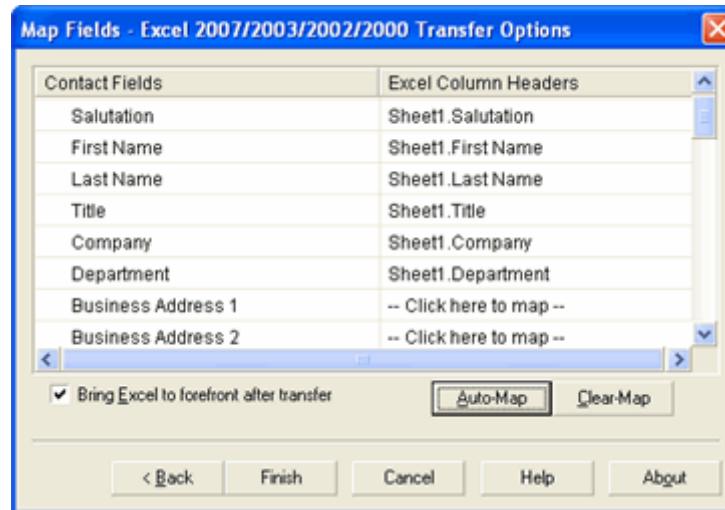


Figure 49: Map Excel Fields

Excel Column Headers: Select column heading that you want to map to the contact field.

Example: Map "Sheet1.City" field to "City".

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

Click **Clear-Map** to clear all the mappings.


Select **Bring Excel to forefront after transfer** to view the Excel Sheet with transferred contact.

Click **Finish** to save the settings.

10.1.3. Transfer into Excel

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Excel Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into Excel Work Book.

 Ensure that Excel Sheet is open.

10.2. Microsoft Word


You can transfer addresses using Word 2007/2003/2002/2000.

You can use Word as destination only.

10.2.1. Setup Transfer Options for Word

You can set to transfer addresses to a mail merge document or to insert in the cursor position of a word document.

Right click the Word Icon in the toolbar and select **Link Options**.

 If the Word Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

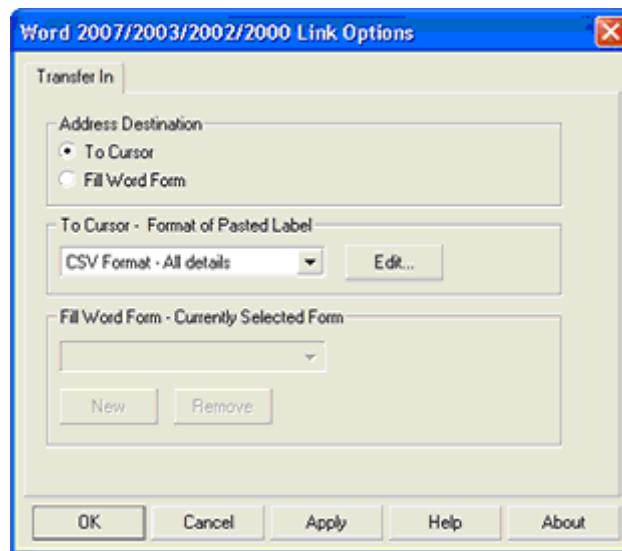



Figure 50: Link Options - Word

Under **Address Destination**, select

- **To Cursor:** To transfer to the cursor position in Word Document.
 - ◆ Select the Template format from To Cursor - Format of pasted label.

 Click **Edit** to add or edit the templates.

- **Fill Word Form:** To transfer to a mail merge document.
 - ◆ Select the mail merge document from Fill Word Form – Currently Selected Form.
 - ◆ Click **Remove** to delete the currently displayed form.
 - ◆ Click **New** to add a new Mail Merge document.
 - The **Add Forms** dialog box appears. Select the mail merge document and click **Open**.
 - In the **Form Alias** dialog box enter the form name and click **OK**.
- Click **OK** to save the settings.

10.2.2. Transferring Addresses to Cursor Position in Word Document

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Word Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred to Word Document.

10.2.3. Transferring Addresses to Mail Merge Document

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the Word Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred to Word Document.

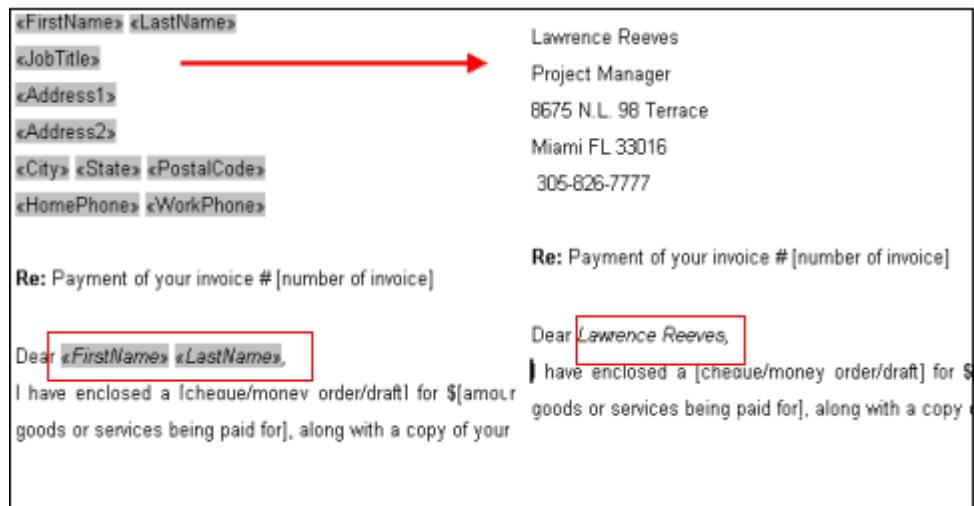


Figure 51: Address Transferred to Mail Merge Document

10.2.4. Create a Form Letter

Setup the main document in Word.



Refer to the Help Topics in Microsoft Word for details to setup a main document for mail merge.

The following field names can be added to form letter. The fields in the **For Return address** column must be manually created and added to the Word Data Source.

For To address	For Return address
First Name	MyFirstName
Last Name	MyLastName
JobTitle	MyJobTitle
Company	MyCompany
Address1	MyAddress1
Address2	MyAddress2
City	MyCity
State	MyState
PostalCode	MyPostalCode
Country	MyCountry
WorkPhone	MyWorkPhone
Web	MyWebsite

If you want to add Return address in your form letter, insert the fields (from the Return address column) in the appropriate places.

On transferring an address to this document, relevant fields from **My Address** application are filled up in the Return address fields.

To fill a different address as your return address, change the default address setup [in My Address](#) application.

11. Transfer into Online Web forms

You can transfer addresses into your Online Web forms using FormFill.

11.1. FormFill

You can map the web form tags to corresponding fields and transfer the addresses.


11.1.1. Setup Transfer Options for FormFill

You can map the form tags and assign default values to the fields in the web form.

Open your online Web form.

Figure 52: Online Web Form

Right click the **FormFill** Icon in the toolbar and select **Link Options**.

 If the **FormFill** Icon is not available in the T toolbar, add the Icon by using the **Add/Hide Applications** window.

Map Form Tags

To transfer addresses to Online Web forms, map the tags from the fields available in your source application to the Online Web form tags.

You can map the tags automatically or manually.

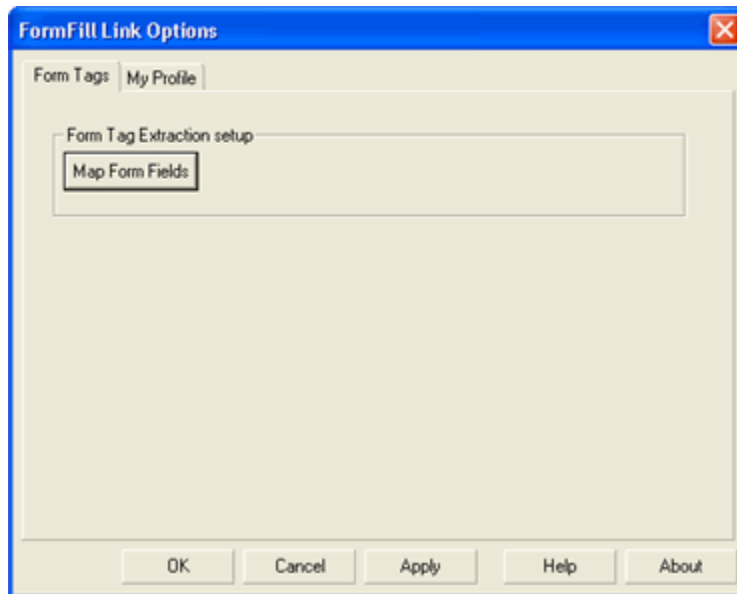


Figure 53: FormFill - Link Options

Map tags automatically

In the Link Options window, click **Map Form Fields**.

Step 1: Select form fields extraction method

Select **Automatically Extract** and click **Next**.

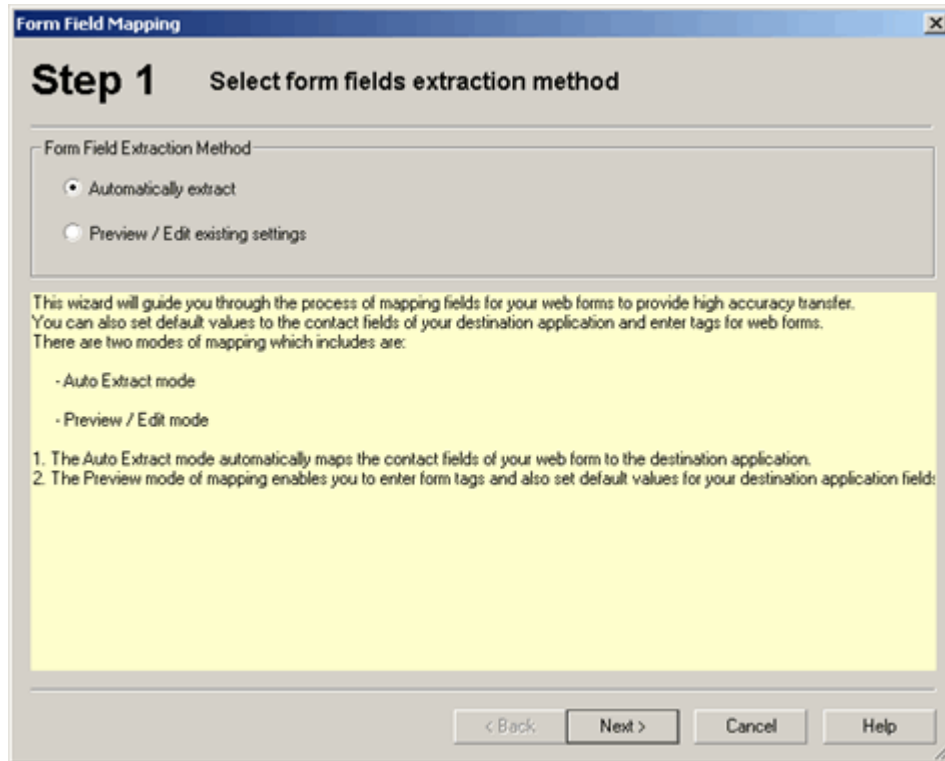


Figure 54: Map Tags Automatically

Step 2: Map field names in form to Application

The Online Web form tags are automatically mapped to the predefined tags of AddressGrabber.

Form Field Mapping

Step 2 Map field names in form to Application

Select Web Form

eGrabber Resellers - Microsoft Internet Explorer

Field Name On Form	Mapped Fields	Values to enter
(name) Name	Name (FN LN)	
(email) Email	E-mail	
(jobtitle) Job Title	Job Title	
(phone) Phone	Phone	
(extension) Ext	Ext	
(company) Company	Company	
(website) Website	Web Site	
(address1) Address	Address_line1	
(city) City	City	
(state) State	State	
(zip) Zip	Zip	

Show Internal Tags Show Mapped Fields

Save Map Delete Saved Maps Map Automatically Clear Test Map

< Back Finish Cancel Help

Figure 55: Map Field Names

- Under **Select Web Form**, the URL of currently active online form is displayed. Click the down arrow to view the list of URLs opened in multiple browsers. You can select another form from this list. The mapped fields are automatically updated according to the selected web form.
- **Field Name on Form**: Displays the tags of the currently active web form.
- **Mapped Fields**: Click to map the fields.
- **Values to enter**: Add values to be transferred.
- **Show Internal Tags**: Select to display the internally built-in tags in the web forms. By default, this option is selected.
- **Show Mapped Fields**: Select this option to view the mapping of web form fields to the pre-defined fields.
- **Save Map**: Click to save the mapping.
- **Delete Saved Maps**: Click to delete the entire mapping of the form.
- **Map Automatically**: Click to map the fields automatically.
- **Clear**: Click to clear the mapping.
- **Test Map**: Enter sample data under **Values to enter** and click here to test the transfer.

Click **Finish**.

Special Fields supported in Form Fill

Apart from the standard contact details, you can also map special fields to the web form tags. Click any field under **Mapped Fields** to select the special fields and map them to the web form fields.

AddressGrabber supports the following special fields:

Special Fields	Consist of:
Address Block	Address1, Address2, Address3, City, State, Zip and Country.
Mailing Address with Title	Salutation, First Name, Last Name, Job Title, Company, Address1, Address2, Address3, City, State, Zip and Country.
Mailing Address without Title	Salutation, First Name, Last Name, Company, Address1, Address2, Address3, City, State, Zip, Country.
Mailing Address (All Details)	Salutation, First Name, Last Name, Job Title, Company, Address1, Address2, Address3, City, State, Zip, Country, Phone, Fax, Mobile, Pager, E-mail id and Website.
All Details with Tags	Transfers all the fields with the tagged information to the selected web form field.

When you map a special field to a web form field, all the fields that are available in the special field are transferred to the selected web form field.



You can also view the special fields in the **Form Info** tab of AddressGrabber Parse Results window during transfer.

Map tags manually

In the Link Options window, click **Map Form Fields**.

Step 1: Select form fields extraction method

Select **Preview/ Edit extract settings** and click **Next**.

Step 2: Map field names in form to Application

Select a tag in left pane and in the right pane type your web form tag or field.

You can enter a single tag per line. Press **Enter** and enter multiple tags for a pre-defined field to save web form mapping for various forms.

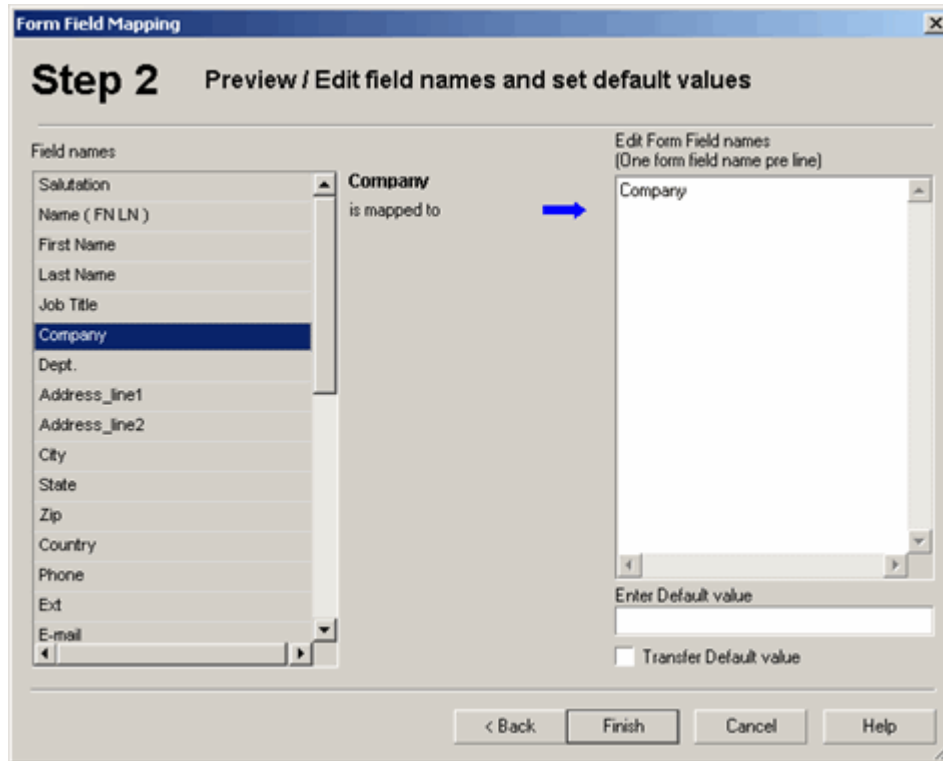


Figure 56: Preview/ Edit Tags

- **Enter Default Value:** Enter the default value to be assigned to the selected field.
- **Transfer Default Value:** Select this option to transfer the default value to the corresponding field.

Click **Finish**.

11.1.2. Transfer addresses into Online Web Form

- Open your Online Web form.
- Highlight the contact information to be transferred.
- Click the **FormFill** Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.

AddressGrabber Parse Result

Salutation: [] First Name: Lee Last Name: Holden Destination: []

Form Info | Contact | Format

Select web form: http://www.egrabber.com/resellers/signup.htm


eGrabber Resellers - Microsoft Internet Explorer

Field Name On Form	Mapped Fields	Values to enter
(name) Name	Name (FN LN)	Lee Holden
(email) Email	E-mail	lee@interact.com
(company) Company	Company	Interact Commerce Corpo
(jobtitle) Job Title	Job Title	
(phone) Phone	Phone	480.610.7444
(fax) Fax	Fax	480.610.7789
(website) Website	Web Site	
(address1) Street Address	Address_line1	8800 N. Gainey Center Dr
(address2) Street Address	Address_line2	
(city) City	City	Scottsdale
(state) State	State	AZ
(zip) Zip/Postal Code	Zip	85258
(sales_name) Name	Name (FN LN)	Lee Holden

Show Map options
 Show Internal Tags
 Show Mapped Fields

Figure 57: AddressGrabber Parse Results window - FormFill

- Verify and Edit the details if required.
- Click **Transfer**.

 The **Form Info** tab appears only when you are transferring into Online Web Forms. The **Contact** and **Format** tabs contain the same options as available for other applications.

The address is transferred to your Online Web form.

The screenshot shows a Microsoft Internet Explorer browser window titled "eGrabber Resellers - Microsoft Internet Explorer". The browser's address bar and navigation buttons (Back, Forward, Stop, Refresh, Home, History) are visible at the top. Below the browser window is a web form with the following fields and values:

Name *	Lee Holden	Street Address	8800 N. Gainey
Email *	lee@interact.com		
Company	Interact Commerce	City	Scottsdale
Job Title		State	AZ
Phone	480.610.7444	Country	United States
Fax	480.610.7789	Zip/Postal Code	85258
Website	www.egrabber.com		

Below the main form, there is a section titled "Please fill in Sales Contact at your company:" with a sub-form containing a "Name" field with the value "Lee Holden".

Figure 58: Address transferred to Online Web Form

Transfer Personal details

You can transfer your personal information to any online web form.

In the **Link Options** window, click the **My Profile** tab.

Enter your personal information.

The screenshot shows a dialog box titled "FormFill Link Options" with a "My Profile" tab selected. The dialog is divided into two main sections: "Personal" and "Address".

Personal		Address	
First Name	William	Street Address	14471, Big Basin Way
Last Name	Stevenson		
Title	Sales Manager	City	Saratoga
Division		State	CA Zip 95070
Company	eGrabber	Country	U.S.
Phone	408 - 872 3102	Email	steve@egrabber.com
Fax	408 - 872 3109	Web Site	www.egrabber.com
Mobile			
Pager			

At the bottom of the dialog, there are buttons for "OK", "Cancel", "Apply", "Help", and "About".

Figure 59: Enter your personal details in My Profile tab

Click **OK**.

Whenever required, this personal information can be transferred to any online web form.

- Open Online Web form.
- Map the Online Web Form Tags.
- Right click the **FormFill** Icon in the AddressGrabber toolbar and select **Send My Profile**.

The information you have entered in **My Profile** tab is automatically transferred to your Online Web form.

12. Print addresses using AddressGrabber

You can print addresses using DYMO Label printer.

We will see first to store default address for transferring using My Address Book that comes along with the product.

12.1. DYMO LabelWriter


You can transfer contact information using DYMO LabelWriter 6.0

You can use DYMO LabelWriter as destination only.

12.1.1. Setup Transfer Options for DYMO LabelWriter

You can setup a template to transfer addresses and select a printer to print the addresses.

Right click the **DYMO LabelWriter** Icon in the toolbar and select **Link Options**.

 If the **DYMO LabelWriter** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Transfer In

In the **Link Options** window, click the **Transfer In** tab.

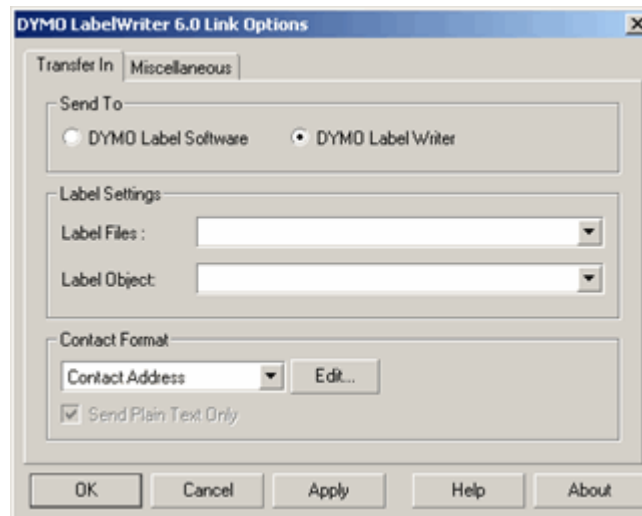


Figure 60: DYMO LabelWriter - Transfer In

Under **Send To:**

- **DYMO Label Software:** Select to capture and save the addresses that can be printed later.
- **DYMO Label Writer:** Select to print the labels directly.

Under Label Settings,

- **Label Files:** Select the template to be used to transfer into DYMO Label Software main window.
- **Label Object:** The objects are displayed in this list based on the selected template. Select the Object to which the address is to be transferred.

Under Contact Format,

- Select the format in which the addresses to be transferred from the list.
- Click **Edit** to create your own template format.

Click **OK**.

Miscellaneous Setup

In the **Link Options** window, click the **Miscellaneous** tab.

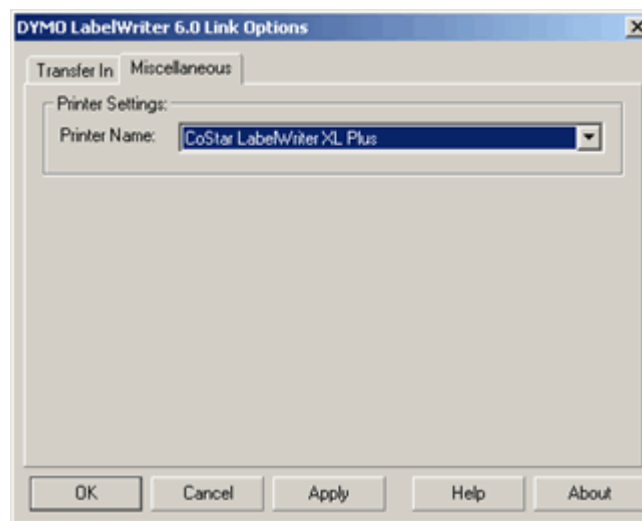


Figure 61: DYMO LabelWriter - Miscellaneous setup

From the **Printer Name** list, select the printer to be used for printing the labels.

Click **OK**.

12.1.2. Transfer into DYMO Label Software

- Highlight the contact information to be transferred.
- Click the DYMO LabelWriter Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into DYMO Label Software in the selected Label Format.



Notes:

- ◆ To view the transferred address, the DYMO LabelWriter must be maximized.
- ◆ In DYMO Label Software, when the **Label File** selected and the Label displayed in DYMO Label Software are not the same, then the address is not transferred. Open DYMO Label Software and ensure that the correct label is appearing for the selected template.

12.1.3. Print Labels in DYMO LabelWriter

- Highlight the contact information to be transferred.
- Click the DYMO LabelWriter Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The address is printed in DYMO printer in the selected label format.



You can print label objects for Addresses only.

13. Exporting addresses using Data Export

You can export the addresses to a text file as Commas Separated or Tab Separated file. This text file can be imported to any application that supports the CSV format.

13.1. Setup to Export Addresses

You can setup to export with a specific separator, file name to save the exported data and other options.

Right click the **Data Export** Icon in the toolbar and select **Link Options**.



If the **Data Export** Icon is not available in the Toolbar, add the Icon by using the **Add/Hide Applications** window.

Setup to Export

In the **Link Options** window, click the **Data Export Link Options** tab.

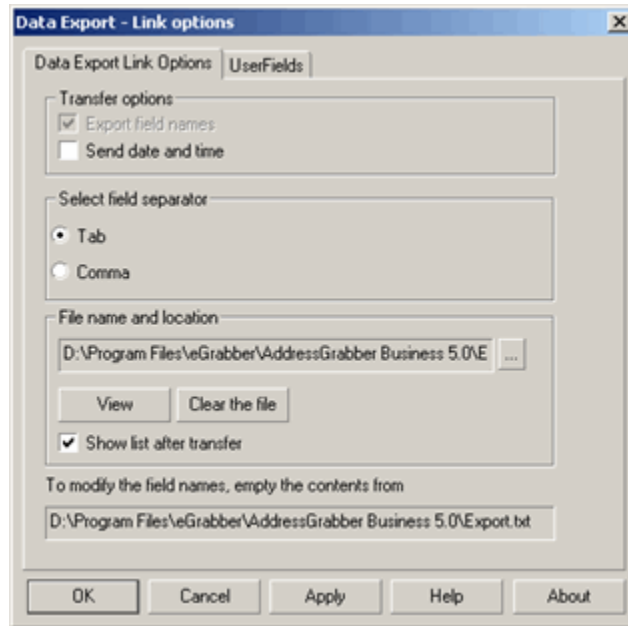


Figure 62: Data Export Link Options


Under **Transfer Options**, you can select the fields to be exported along with the data.

- **Export field names:** Select this option to export the field names (*Name, Address, City and so on*) that are saved as headers for the fields in the destination file. If you do not want to have headers, then clear this option.
- **Send date and time:** Select this option to export the date and time of transfer.

Under **Select field separator**, you can select the format in which the contact details are to be transferred.

- **Tab:** The data is separated by a Tab space and exported.
- **Comma:** The data is separated by a comma and exported.

Under **File name and location**, you can select the file name and path to save the exported file.

Click  and select the location. Enter the filename and click Save.

View: Click to view the file that contains the contact details. The file displays data only after transfer.

Clear the file: Click to delete the contents of the file.

Show list after transfer: Select this option to open the file after transferring the contact.

Click **Apply** to save the settings.



The **Export field names** option is enabled only when the destination file is not containing any data. Click **Clear** to delete the contents of the file so that this option is enabled.

Add / Remove User Fields

In the **Link Options** window, click the **UserFields** tab.

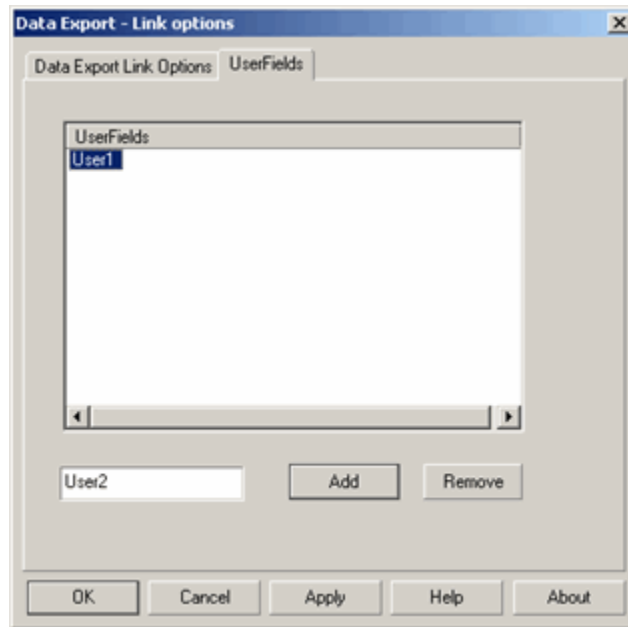



Figure 63: Data Export - User Fields


To Add User Field:

- Enter the name of the field in the text box provided before the Add button. **Example:** User1
- Click **Add**. The field entered is displayed under **UserFields**.
- Click **Apply** to save.

 You can create 18 user-defined fields in this tab.

To Delete User Field:

- Select the user field name displayed under **UserFields**.
- Click **Remove**. The user field name is removed from **UserFields**.
- Click **Apply** to delete.

 can add or delete the user fields only when the destination file is not containing any data. Click **Clear** in the **Data Export Link Options tab**, to delete the contents of the file.

13.1.1. Exporting addresses

- Highlight the contact information to be transferred.
- Click the **Data Export** Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.

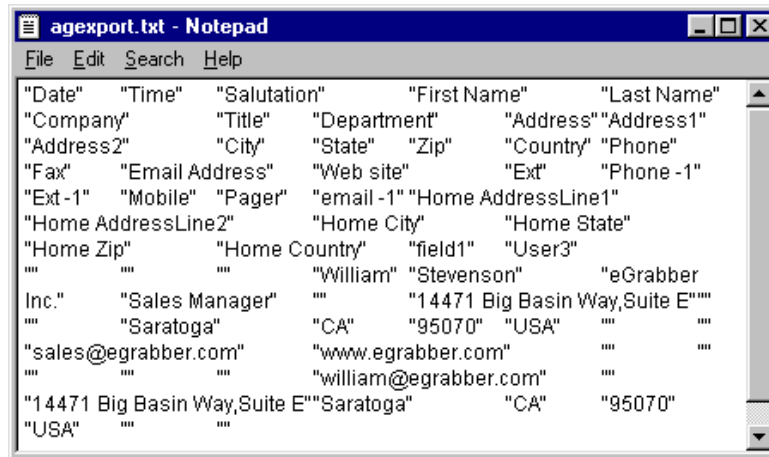


Figure 64: Address transferred to Data Export file

The selected address information is transferred to a text file in CSV format.

14. Transfer using other applications


You can transfer addresses using other applications like Clipboard and Notepad.

14.1. Clipboard

Clipboard can be used as both source and destination.

14.1.1. Setup transfer options for Clipboard

Right click the **Clipboard** icon in the toolbar and select **Link Options**.

 If the **Clipboard** icon is not available in the Toolbar, add the icon by using the **Add/Hide Applications** window.

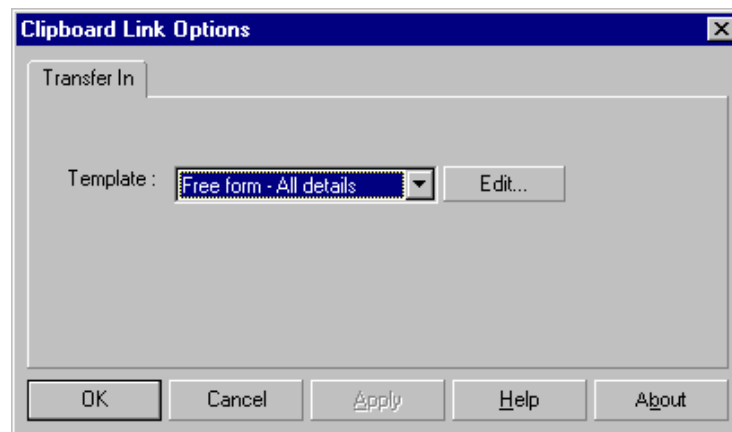


Figure 65: Clipboard Link Options

- Select a template from the **Template for RTF format** list and click **OK**.
- Click **Edit** to create a new template.
- Click **OK**.

Refer [Chapter 11](#) for more details on creating a template.

Now you can transfer addresses from any source application to Clipboard.

14.1.2. Transfer from Clipboard

You can transfer contacts from Clipboard into any destination application.

- Copy an address to Clipboard.
- Ensure that Clipboard is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

14.1.3. Transfer into Clipboard

To transfer the contact:

- Highlight the contact information to be transferred.
- Click the **Clipboard** Icon in the AddressGrabber toolbar.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The Contact is transferred into Clipboard in the selected template format.



The data in Clipboard can be re-directed to any application.

14.2. Notepad

Notepad can be used as a source application.

- Ensure that Notepad is selected as Source in the AddressGrabber toolbar
- Click the destination icon in the toolbar to which the address should be transferred.
- **AddressGrabber Parse Result window** is displayed.
- Verify and Edit the details if required.
- Click **Transfer**.
- The contact is transferred to the selected destination application.



If your destination application supports double address section, then you can transfer addresses to both the sections (Business and Home). Select the option "Both addresses" in the **Transfer In** tab of the destination **Link Options**.

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