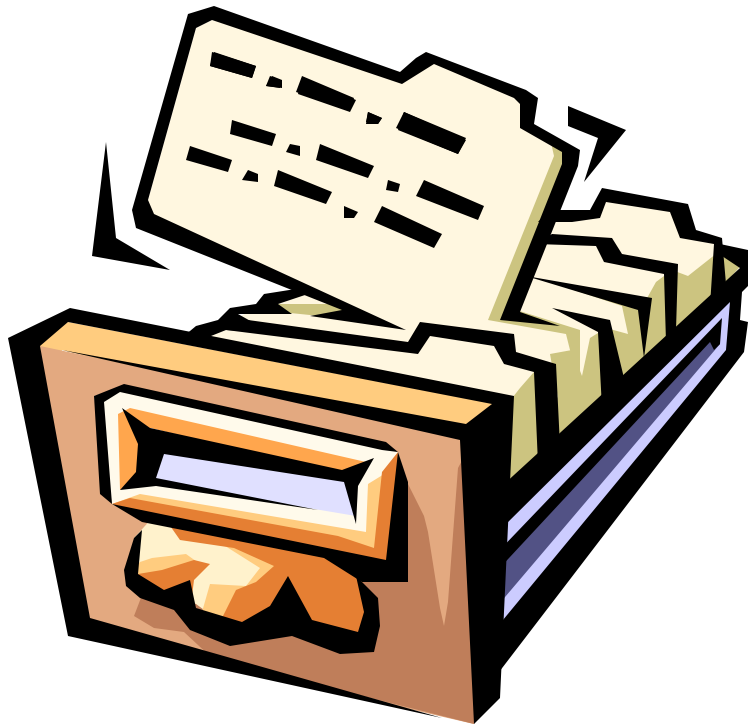


# *eConvert for Outlook*

*V2.1*



Convert ANY email into contacts with  
the click of a button!

By PersonalCRM Inc.

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## Introduction

The purpose of eConvert for Outlook is to convert e-mails with data into Outlook Contacts. Import WEB Submissions, resumes, personal data, lists, addresses, and just about any text e-mail into an Outlook Contact. In addition, you can create events (todo, call, meetings) for each conversion with the conversion data attached as an event detail for best record keeping.

## Application

EConvert for Outlook is ideal for anyone that receives contact information via e-mail and wants to convert the contact information from standard Text Format into Outlook Contact Format. The information is converted on command. No more retyping information into the contact database, simply eConvert-it!

## Major features of eConvert for Outlook

- Easy Use** Convert WEB submissions or email data into Outlook contacts without retyping.
- PIM Supported** EConvert for Outlook supports Outlook 2000 or later
- Easy Setup** Setup all fields that have to be parsed and entered into the Outlook Database. From our tests, we've been able to parse any field combination from Label-driven fields to full addresses to Line labels.
- Immediate Results** You can immediately discover the results by using the test window. No longer do you have to wait until the leads are streaming in to discover where you went wrong.
- MAPI Compliant** Fully compatible with Outlook Automatic e-mail-to-Contact matching makes internet contact management a breeze to perform.
- Duplicate Checking** Incoming data is automatically checked against existing contacts so that no duplicate contacts are created.
- Free Trial** Out free trial allows you to analyze and test this product's great capabilities.

## Installation

Execute the self-extracting eConvert for Outlook executable to install it on the system. You will need [MDAC 2.6](#) installed in your system in order to run eConvert for Outlook.

Once installed, the software will run by executing it. If you are running eConvert for Outlook, you will need to setup the database in the settings menu.

To access all settings, right click over the eConvert for Outlook icon on the system tray.

If you desire for the system to run on the background, you must enable Background Conversions in the settings menu.

Enter the Setup Import Sources menu to setup your import sources and their respective lead parsing mechanisms. Remember, you can do it in any order that you want.

You must have Outlook 2000 installed in order to be able to use eConvert for Outlook.

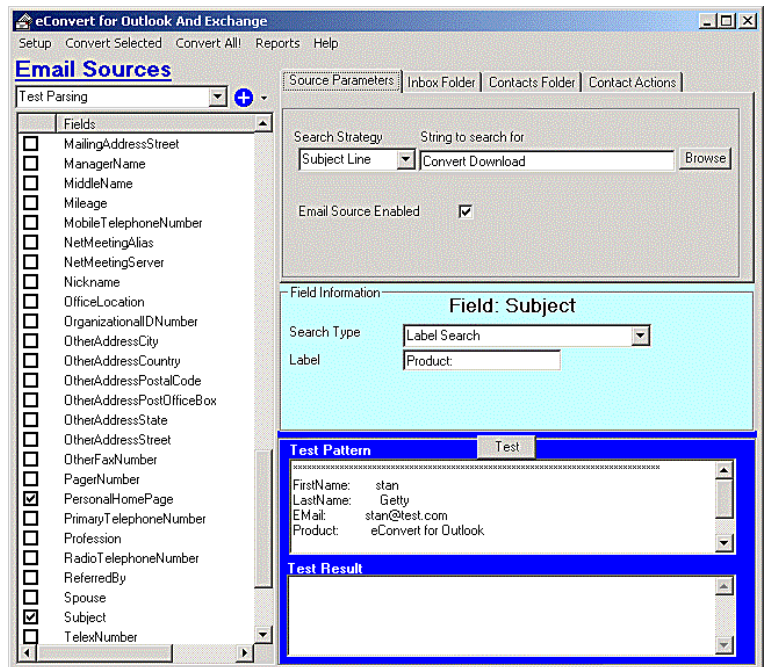
## The Main Import Screen

The main import screen is the interface that shows you how eConvert for Outlook works. All the options are accessible through this screen.

**Email Sources:** an Email Source is the source from where you get the field from the WEB submit or from the e-mail. Each web has various forms that submit data for you. Each form can be considered an email source.

Email sources are identified by the text on the *Subject Line* or by the *Email To* part of the email. If the email subject line text matches the Subject Search Key, then that e-mail is identified to come from that particular Email Source and scanned accordingly.

Note: If you have 2 Email Sources with the same subject search key, only one email source will be activated.



## The list of Available Fields

The list of available fields that are available for scanning is listed here. Simply click on the checkbox to enable these fields to be scanned. To remove, simply click on the checkbox and the fields will not be processed.

The list of fields include the standard Outlook 2000 fields plus any user-defined fields. Fields that are generated by Outlook 2000 and that are read-only will not appear in this list because these fields are system generated and can not be modified by eConvert for Outlook.



## Source Information

The source information panel is a Tab folder where you setup the general behavior of eConvert for Outlook 2000.

### a. Source Parameters

Here you setup how you want to identify the emails and whether this source is enabled or not.

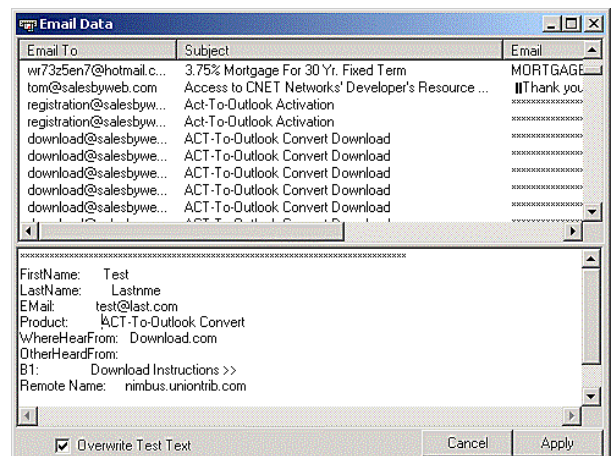
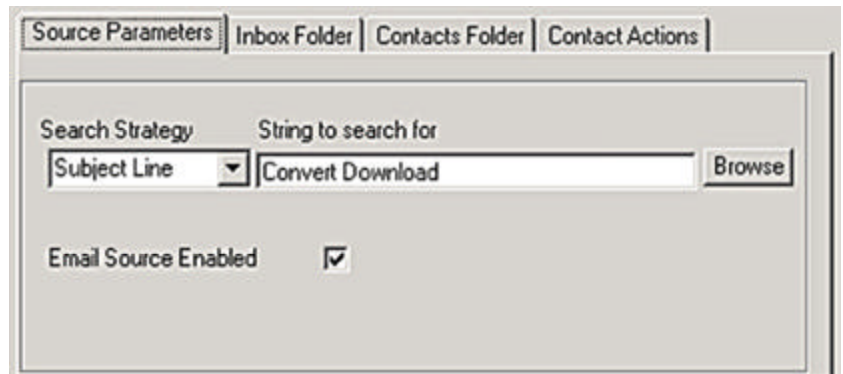
- ◆ Search Strategy:
  - eConvert provides you with 2 means of identifying email from a source:

- By Email To. If you setup an email to receive for example, resume applications, you'd apply this feature here.
- Subject Line. If you want to identify the email by subject line, enter the subject line identification here i.e. Leads.

- ◆ Email Source Enabled. This flag enables/disables scanning for a particular email source.

- ◆ Browse Button. The browse button displays a window that shows a list of emails in your mailbox. From this list, you can select the email you want to search when you convert.

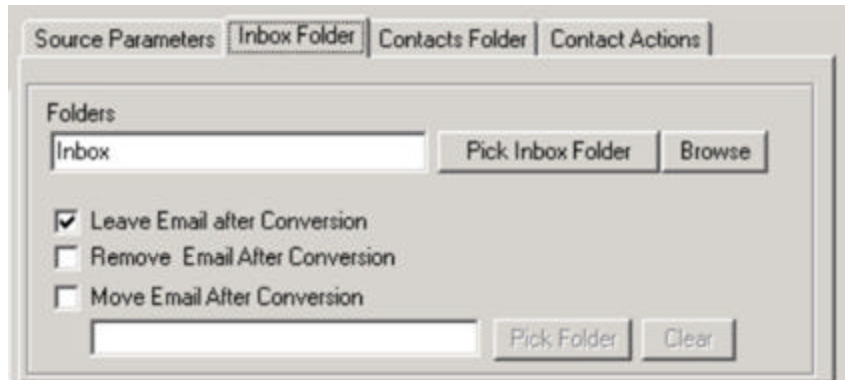
**Apply Button:** When you click apply, eConvert will look at what search strategy you have and set the correct parameter in the String to Search For. In addition, if the



Overwrite flag is set, the test text in the main form is overwritten.

***b. Inbox Folder.***

In this folder, you setup the email inbox and the appropriate actions when emails are converted. You can pick any inbox folder that is available in your Outlook.



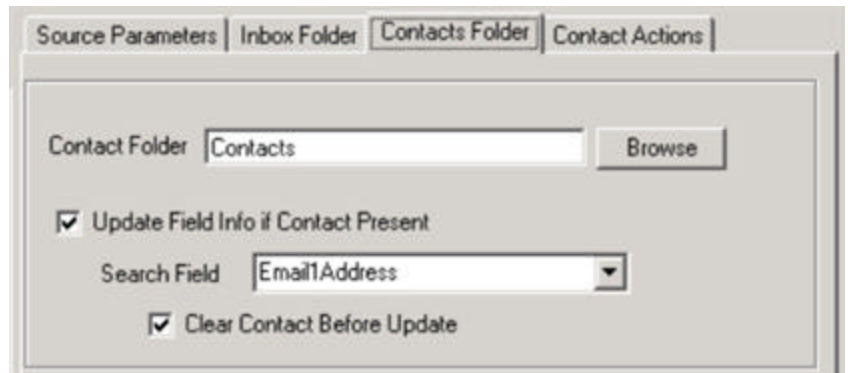
When an email is identified, you have 3 options to process the email:

- 1- Leave the email after conversion. Don't do anything to the email.
- 2- Remove the email after conversion. Remove the email after you are done converting it. The email is deleted from Outlook.
- 3- Move Email After Conversion. You can setup an email folder to store the converted email. After conversion, the email is moved to the folder.

***c. Contacts Folder***

In the contacts folder you get to choose where the converted contacts get deposited and what actions to take when a contact is found as a duplicate.

The search field is the field you define where eConvert for Outlook should search for duplicate contacts.

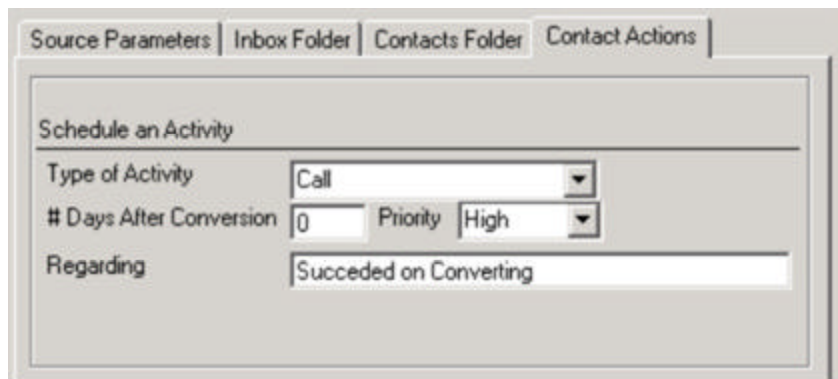


***d. Contact Actions***

EConvert provides you with two major actions that you can take when an email is converted into a contact, namely, set a field in the contact or schedule an activity for the converted contact.

***Schedule an Activity***

This is a very powerful feature in eConvert. When you import a contact, you can schedule a meeting,



call, or a todo from the date the contact has been imported. **When you schedule an activity, eConvert inserts the text of the imported email into the details field of the activity.** Hence, when you schedule an activity you keep a historical and textual record of when the contact was inserted into the database.

## Field Import Information and strategy

EConvert for Outlook provides users with extensive, independent field scanning methodology unrivaled in the industry. Select which fields you want to scan for and eConvert will do it independent of order and positioning.

EConvert provides you with 3 easy to use scanning methodologies and with 2 advanced scanning options if you need them:

1. **Label Search.**

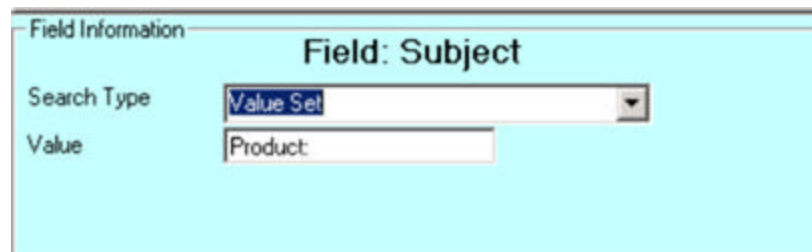
In this methodology, you simply specify the label to look for and the system does the rest.



The screenshot shows a dialog box titled 'Field Information' with the field name 'Field: Subject'. It has two input fields: 'Search Type' with a dropdown menu currently showing 'Label Search', and 'Label' with a text box containing 'Product:'.

2. **Value Set.**

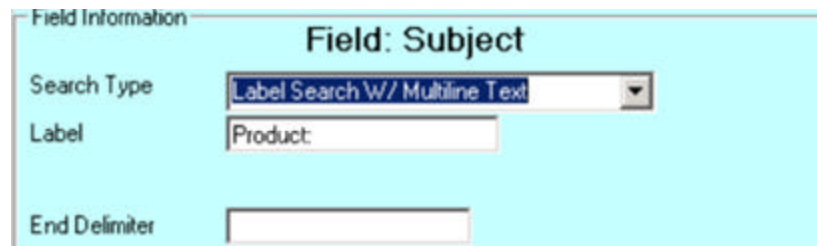
Here you specify what value you want to set a field to. This is independent of any of the other values being scanned.



The screenshot shows a dialog box titled 'Field Information' with the field name 'Field: Subject'. It has two input fields: 'Search Type' with a dropdown menu currently showing 'Value Set', and 'Value' with a text box containing 'Product:'.

3. **Label Search with Multi-Line Text.**

This option is used when you are looking for a label but you get multiple lines



The screenshot shows a dialog box titled 'Field Information' with the field name 'Field: Subject'. It has three input fields: 'Search Type' with a dropdown menu currently showing 'Label Search W/ Multiline Text', 'Label' with a text box containing 'Product:', and 'End Delimiter' with an empty text box.

when the data comes in. In this context, you want to scan from the label until you encounter the text delimiter which could be another label or the end of text, namely <EOT>.

4. **Label Search Pro**

Label search pro opens the world to do complex scans of data from emails as described below.

## 5. Line Instance Search

The same as Label Search Pro but the search starts on a particular line.

The field information panel is where you setup the fields to scan for in Line Instance Search and in Label Pro Search.

For each field that you choose to import from the email, you have to setup its Field Information data. One of the benefits of this strategy is that field information can be entered in no particular order and it may be scanned independently of results from other field scans.

The screenshot shows a 'Field Information' panel for a field named 'Subject'. It contains several input fields and a dropdown menu. The 'Search Type' dropdown is set to 'Line Instance Search'. The 'Instance #' field contains the value '0'. The 'Label' field contains 'Product:' and the 'Bookmark' field is empty. The 'Begin Delimiter' and 'End Delimiter' fields are empty. The 'Delimiter #' field contains '0'. The 'In-String Delimiter' and 'In-String Word Pos.' fields are empty.

## Field Processing

Fields are processed in two stages: first, the text is selected to be processed; second, the field is extracted from the selected text. Literally, the system first defines which selection of characters to analyze (Selecting Text), and then extracts the relevant field to process.

## Selecting Text

First you want to position the search into a particular text area.

If all labels are unique in the email, this may not be necessary, however, you can't always depend on the uniqueness of labels. Hence, a more comprehensive way to search text.

- ◆ **Search Bookmark**: Specifies where to start processing i.e. Company Information, Personal Information, etc.. It positions the beginning of the search. Consider it as a unique place where to start the search, like a book mark. If no search bookmark is necessary, simply leave this field empty.
- ◆ **Search Type**. Once the search bookmark has been found, we now must search for the data to process.
  - **Label Search**. This indicates that the text selected is label driven i.e. Address:, City: . The system then marks the end of the label as the starting point. With this search type you must to specify the label.
  - **Label**: The label to look for when doing a Label Search
  - **Line Instance Search**. In some cases, you don't have a label to rely on. Hence, you can specify the system to go to a particular line after a bookmark (or from the beginning) and start the field processing there.
  - **Line Instance Number**: The number of lines to skip before getting to the text that we want to process.

## Single Field Processing

After having reached the field to be processed, the system then needs the data to scan through the test that follows. This data can be retrieved using a variety of simple settings to scan through the text:

- ◆ *Begin Delimiter*. This is a character that identifies where to start processing the field. For example, if you are looking for San Francisco in 234 Street, San Francisco, CA 94000, USA, the begin field delimiter would be a comma ",". If you were looking for State, the Begin Delimiter would still be a comma ",", but it would be the second one. The begin delimiter indicates to the system where to begin. If absent, the system will start scanning either right after the label (in Label Search) or at the beginning of the line (Line Instance Search).
- ◆ *Delimiter #*. Specifies the number of the delimiter. As specified above, if you are looking for the State, you'd use "," as Begin Field Delimiter and Delimiter # as 2 since it is the second iteration of the specified field delimiter.
- ◆ *In String Delimiter*. Once you've found the beginning of the field, you may want to specify an end of the text. To find San Francisco on our example, the string delimiter would be another comma ",", If you have multiple lines, you can use the next label as the Delimiter or if you want to parse until the end of the text, use <eot>. If no in string delimiter is specified, the system assumes the end of the text is the end of the line.
- ◆ *End Delimiter*. Unless Specified otherwise, this means the end of the text line. If you want the text to span across many lines, use the next label as your End Delimiter. This allows you to have multi-line data to be scanned.
- ◆ *In String Word Position*. If you want to start at a particular word on a string, specify here. This allows you to jump to a word number on the string.

From our experience, the options above will scan just about any data entry.

## Hints on Field Scanning

- ◆ Scan each field separately with clear patterns. Coordinate with the provider of the data and request changes on the delivery and format of the e-mail to match your needs.
- ◆ Test. Copy a lead and paste it into the test screen. Run tests to see if your rules match the format of the test screen.
- ◆ Setup a master field scanner. When creating field scanning mechanisms for other e-mail data sources, simply copy the parameters from similar setups, change the Search String and adapt the field setup
- ◆ Change the web page if necessary. If you have setup a web page that provides you with leads and you are finding them impossible to scan, change the web page format into a field format or a simpler format.
- ◆ Delete the email. After scanning, remove the email from the mailbox (it goes into the delete folders). This alleviates the system from scanning the same e-mail multiple times.

- ◆ Push for a standardized format. Don't allow people to simply send you e-mail ad-hoc. If you can, setup a web page that is used for submission of information. This enables you to control the format and setup filters to scan and integrate the data into your contact database.

## Test Pattern

The test pattern offers you with a quick and easy way to see if your field extractions work well. Simply paste the email content into the top panel (Test Pattern) and click Test. The lower panel indicates the result of the field setup.

A field that resulted in an empty scan, will simply come up as blank.



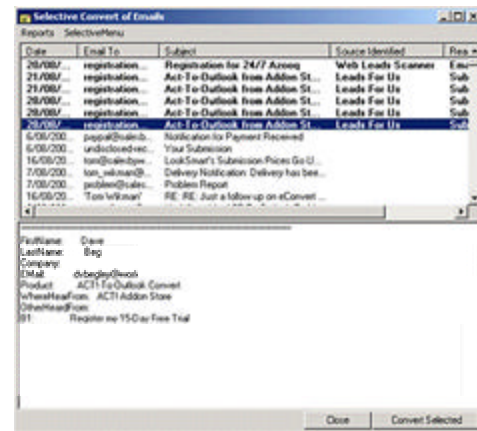
## Execution

Econvert provides you with 2 means of converting emails: one, by looking at the email matches and converting them i.e. Selective Conversion, and second, go through all the emails in the inbox and convert them all.

### Selective Conversion

In Selective Conversion you get a screen that lists all the emails in the specified inbox. The emails are sorted according to the Search Identifier and the emails that have been identified as data to process is bolded. To convert, select the email and press Convert Selected. For more than one conversion, select multiple emails and press Convert Selected.

The system will then provide you a status screen of the conversion process.



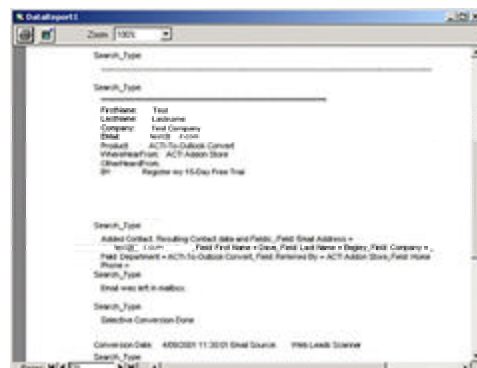
### Convert All

By pressing the Convert All button, eConvert scans all the emails in the setup email mailbox and converts them.

## Reports

EConvert keeps track of the input emails that resulted on conversions. By pressing the reports button, the reports is displayed and it can either be printed, exported, or used as an analysis tool.

To clear the reports, press clear reports and all the data is erased from the database.



## **Background Processing**

Due to Outlook's Security patch, background processing is not available on V2.1 of eConvert for Outlook.

## **Further Information**

For further information access our support web at <http://www.personalcrm.com> or e-mail us at [sales@personalcrm.com](mailto:sales@personalcrm.com)