

# Advanced Internet Services

## w/ Smart Data Collector

v.2.0

Another efficient and affordable ACT! Add-On by



<http://www.exponencial.com>

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## Purpose of the add-on:

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Advanced Internet Services allows to query internet based directories by simply clicking a button. You may connect to phone directories, map services, search engines, industry directories in a snap and grab relevant information to update a current contact or create a new contact.

## How it works

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Once your database is open, simply run *Advanced Internet Services* and choose the Internet Service you want to connect to. The program will automatically query the service with the proper data from the currently active contact of your ACT! database.

## Installation procedure

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Download the program file from our [download page](#) and double-click it to start the installation. Follow the instructions and once the installation is completed, run ACT! and open your database.

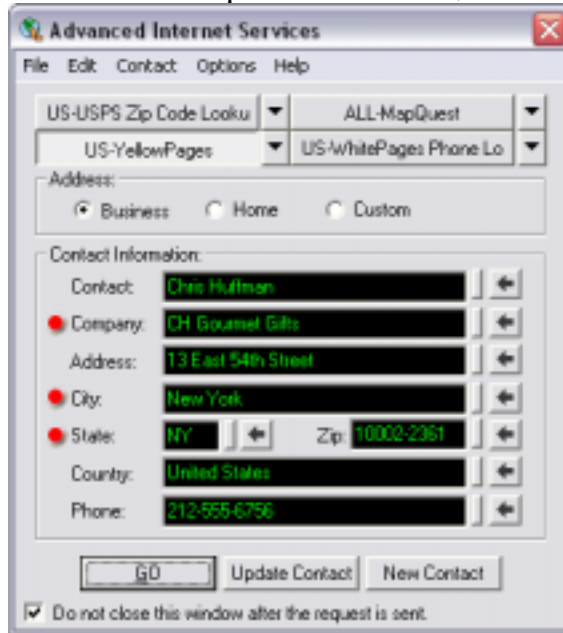
An icon will be automatically added to your Contact view toolbar.

In the event this installation process failed, click the Windows *Start* button, go under *Programs*, locate the *Exponencial ACT! Add-Ons* group and click *Advanced Internet Services*. The main window will be displayed. Go to the *Options / Integrate with ACT!* menu and add icons or menu items to your ACT! screens as needed. When prompted, accept that ACT! be re-started.

When ACT! re-starts, whatever icons or menu items you asked to be created will be there to launch *Advanced Internet Services*.

## Using preset services

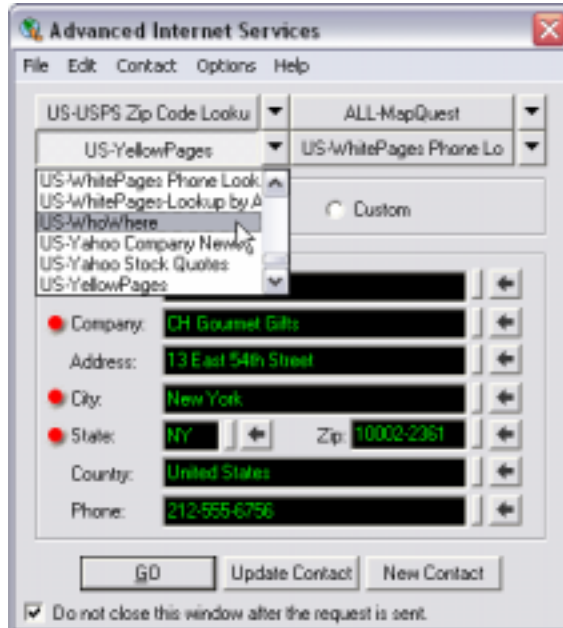
A number of popular Internet services (I. S.) are already preset. Simply click the preset button of the service you want to connect to. When a pre-set is selected, it will appear recessed.



*The red dot to the left of a field indicate that this field will be sent to the I.S.*

Then click the GO button and your web browser will connect to the I. S. and display the results. It could be a map of your client's facilities, her/his entries in the phone book or in an industrial directory.

**NOTE:** If the service you want to connect to is not one of the 4 buttons or if the button is blank, click one of the down arrow buttons and select the service from the list.



Then press the Go button.

### Editing the information sent to the IS: use of the clear button

Sometimes sending too many fields or sending information that is too detailed will make the I. S. return no result. Or it might be that the information contained in your database does not match the one contained in the I. S. database.

You may work around this by editing the information sent to the I. S.:

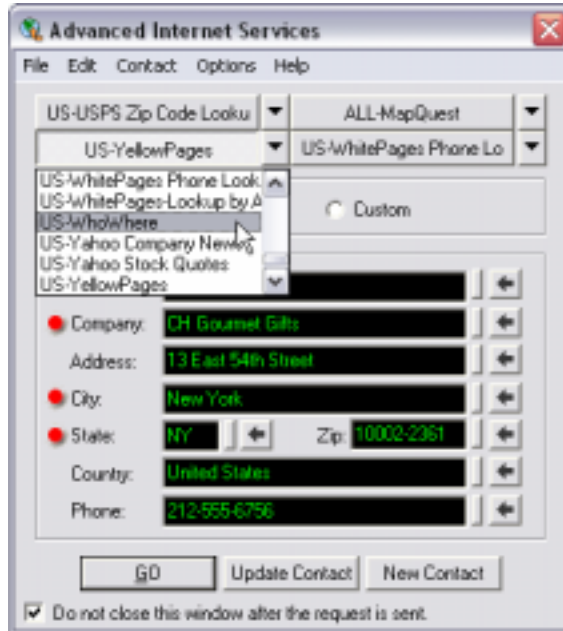
- o simply click in the field you want to edit and type
- o use the Clear buttons to the right of each field. Clicking once on the button will clear the data. Clicking again will refresh the field with the data contained in ACT!



For instance, you may have entered "ABC Technologies" in your database when the actual company name in the I. S. directory might be "ABC Internet Technologies". In this case, the I. S. may return a "no result found" message. You might want to edit the company field to read "ABC" and submit your request again.

### Changing presets

To assign a different I. S. to a preset button, click on the dropdown arrow to the right of the preset button. A list of installed presets will appear: select the one you want.



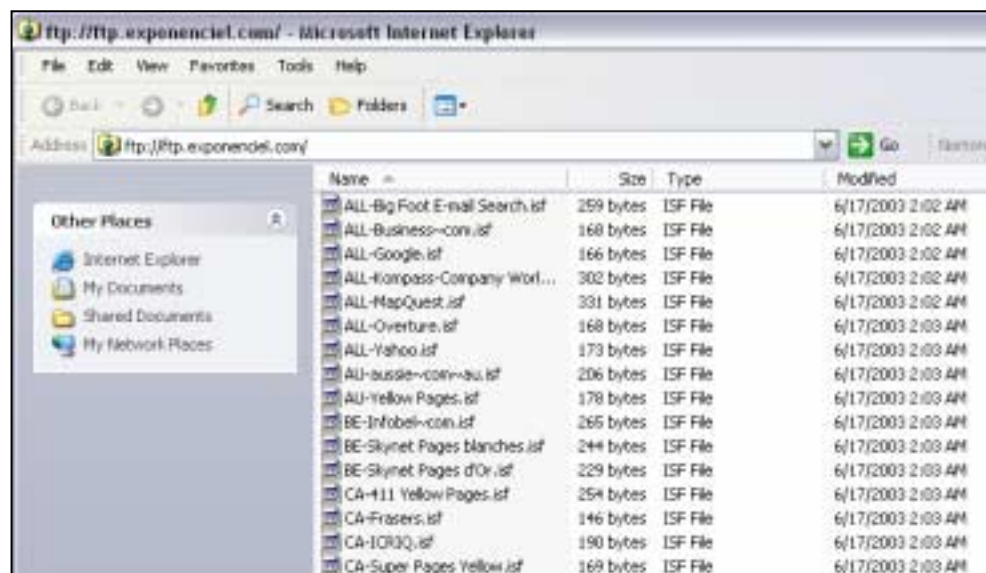
## Downloading more presets

If the I. S. you would like to connect to does not appear in the list of installed presets, you may want to check if it is available on our server. Go to the *Services* menu and choose *Manage presets*.



Click the *Get List from Server* button (below the list on the left side) and the add-on will retrieve the list of all presets uploaded to our server. If the preset you are looking for is there, select it and click *Install*. A message will confirm that the installation was completed.

If you are unable to connect to our FTP server using the method described above (for instance, because you are using a proxy server and the add-on is not able to resolve it), click the *Manual connection* button to have your web browser connect to our server. Once the connection is established, you'll see something like this:



To install one of the presets you see on the server, select it, do a right-click and choose *Copy* (or *Copy to Folder...*) and copy the file to your presets directory (if you installed the program to the default location, your preset directory is : c:\Program Files\Exponencial\Advanced Internet Services\Presets).

## Grabbing information from the web

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Once the information you are looking for is displayed in your browser, you may use Advanced Internet Services to grab information from that page and update or create an ACT! contact. You may selectively grab information to update one field of the contact or grab multiple lines or information: simply highlight the information you want to grab and click one of the grab button (the buttons with an arrow next to each field).

If you highlight data on more than one line, the *Smart Data Collector* will automatically be started when you click one of the grab buttons.

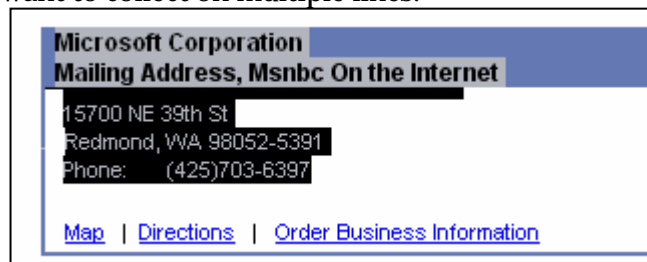
If you have difficulties understanding the following procedures, watch the tutorials that can be accessed from the *Online help* menu.

### Collecting information to update one field at a time

Simply highlight the text in the web page and click the Grab button ( ← ) next to the field you want to copy the information to.

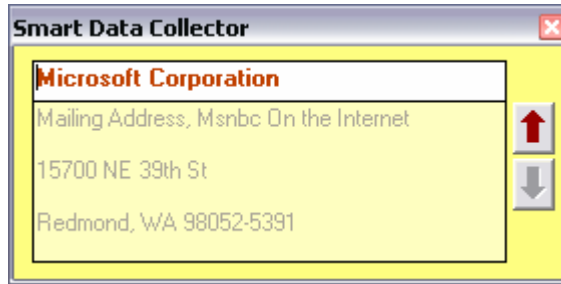
### Collecting information with the Smart Data Collector

The *Smart Data Collector* is automatically launched when you highlight more than one line. So highlight the data you want to collect on multiple lines.



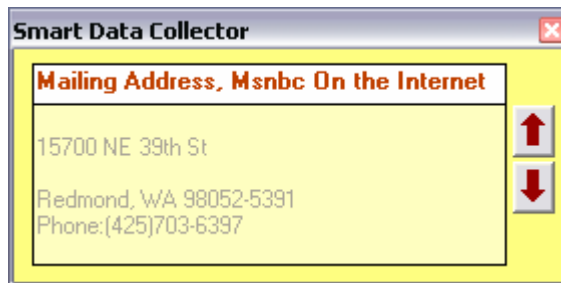
Don't worry if you grabbed too many lines of text.

Then click any Grab button to launch the *Smart Data Collector*.



### Moving data to a field

The data you highlighted is now entered in the *Smart Data Collector*. The first line is in the white box. This is the information that will be copied to the field of your choice the next time you click one of the Grab buttons. In the case shown here, you would click the Grab button of the Company field. After you do, the white box automatically displays the next line.



### Moving to the next line without collecting information

Sometimes the line is of no interest. Click the Up arrow of the *Smart Data Collector* or click anywhere on the *Advanced Internet Services* window to go to the next line. Blank lines are automatically skipped.

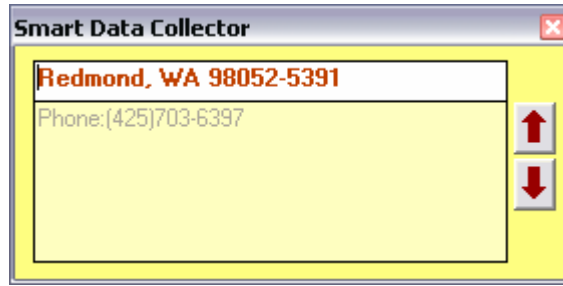


Since this is the address, click the Grab button next to the address field.

### Collecting combined City, State, Zip information

The next line displays City, State and Zip.





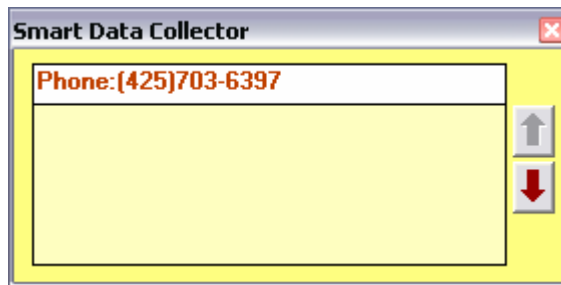
Since this configuration is often found on the Internet, provided the *Enable US address auto-recognition* checkbox is checked under the *Country* tab of the *Options/Preferences* window (it is checked by default), the *Smart Data Collector* is able to parse the information in the 3 appropriate fields. Click the grab button of the zip field to update the 3 fields at a time.

If you had City, State, you would click the grab button of the State field.

Combined fields	Click the grab button of the
City, State	State field
City, State, Zip	Zip field

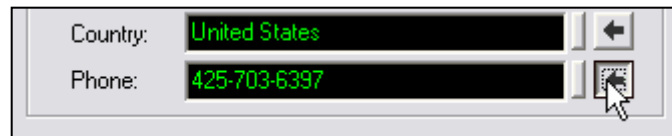
**Removing labels**

Most labels are automatically removed by the *Smart Data Collector* when they are at the beginning of a line. For instance, the "Phone:" label shown here will not be copied to your phone field.



### Phone field formatting

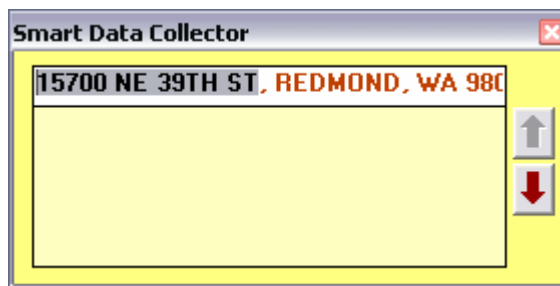
When moving data to any phone field, *Smart Data Collector* will use ACT! format phone fields. In this particular case, when you click the grab button of the phone field, here is the information that gets moved to the Phone field:



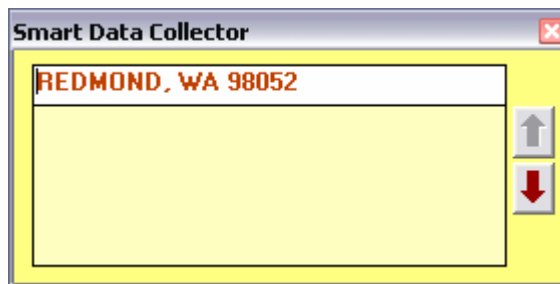
A screenshot of a form with two input fields. The first field is labeled 'Country:' and contains the text 'United States'. The second field is labeled 'Phone:' and contains the text '425-703-6397'. To the right of each field is a small square button with a left-pointing arrow, which is the 'grab' button. A mouse cursor is shown clicking the 'grab' button of the 'Phone' field.

### Moving only part of a line to a field

Some Internet services make it more difficult by combining a lot of information on one line. To grab only part of the line, simply highlight the part you want to move to the field in the white box, as show below and click the grab button of the target field.



Once the information is copied, it is removed from the white box so that you may continue data collection.



Note that the *Smart Data Collector* automatically removes unwanted characters like punctuation in front of data it moves to the white box: the comma is now gone even though it was not moved to the target field.

### Undoing a grab command

If you want to undo a grab command, go to the *Edit* menu and choose *Undo last grab*.

## Updating your ACT! contact

When you are done grabbing the information, click the *Update ACT!* button to update the current contact with the information contained in the Advanced Internet Services window.

### **Important note:**

When you click the *update ACT!* button, any change you made to any field (whether you grabbed information from the I.S., retyped a field to send it to the I.S. or cleared a field) will be sent to ACT!.

If you updated your ACT! contact and want to undo the changes, go to the *Edit* menu and choose *Undo Update ACT!*.

## Creating a new ACT! contact

If instead of updating the current ACT! contact, you would rather create a new contact with the grabbed information, simply click the *New Contact* button.

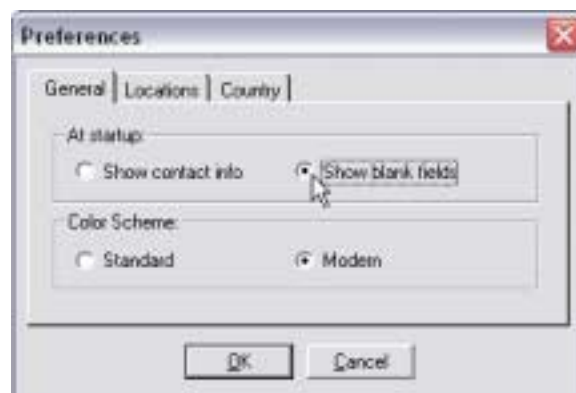
## Clearing all fields – Loading current contact information

To clear all fields of the *Advanced Internet Services* window at once, maybe before collecting information to create a new contact (see above), go to the *Contact* menu and choose *Clear all fields*.

To load (or reload) the current contact information in the fields of the Advanced Internet Services window, go to the *Contact* menu and choose *Load all fields*.

## Always starting with blank fields

By default, when you start Advanced Internet Services, the fields are automatically loaded with data from the current ACT! contact. Even though you may blank all fields using the *Contact/Clear all fields* command, if you are using Advanced Internet Services mainly to create new contacts, you probably would rather start with blank fields directly. You may instruct the program to do so under the General tab of the Preferences window (*Options|Preferences*).



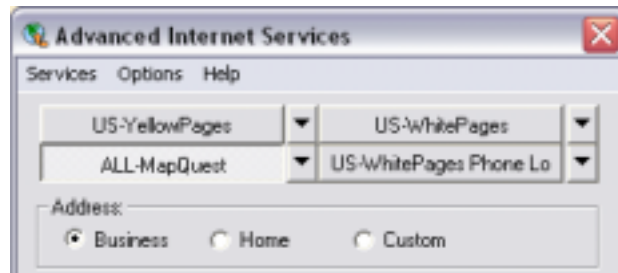
## Different kinds of services

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You can have 3 types of services in *Advanced Internet Services*.

### Address-based service

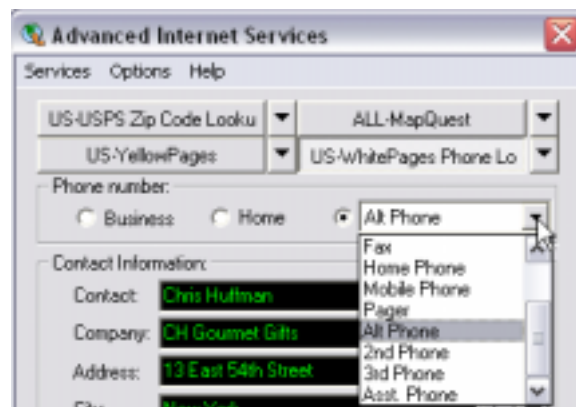
If you select an Address-based service, *Advanced Internet Services* will automatically give you the option to choose between the Business address, Home address and a custom address to be sent to the I. S.



The Custom address fields can be defined in the New service window or Edit service window (see *Editing a service below*).

### Phone-based service

If you select a Phone-based service, *Advanced Internet Services* will automatically give you the option to choose between the Business phone #, Home phone # and any other phone-formatted field contained by your database to be sent to the I. S.



### Other type service

The other type of service simply does not offer the phone number or address selection.

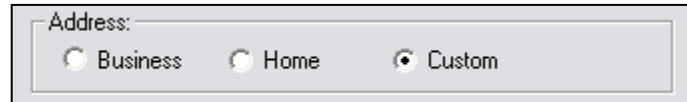
## Editing a service

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To edit a service, simply choose the item "Edit a Service" under the Services menu.

By default, the window shows the settings of the currently active service but you may change it using the top dropdown box.

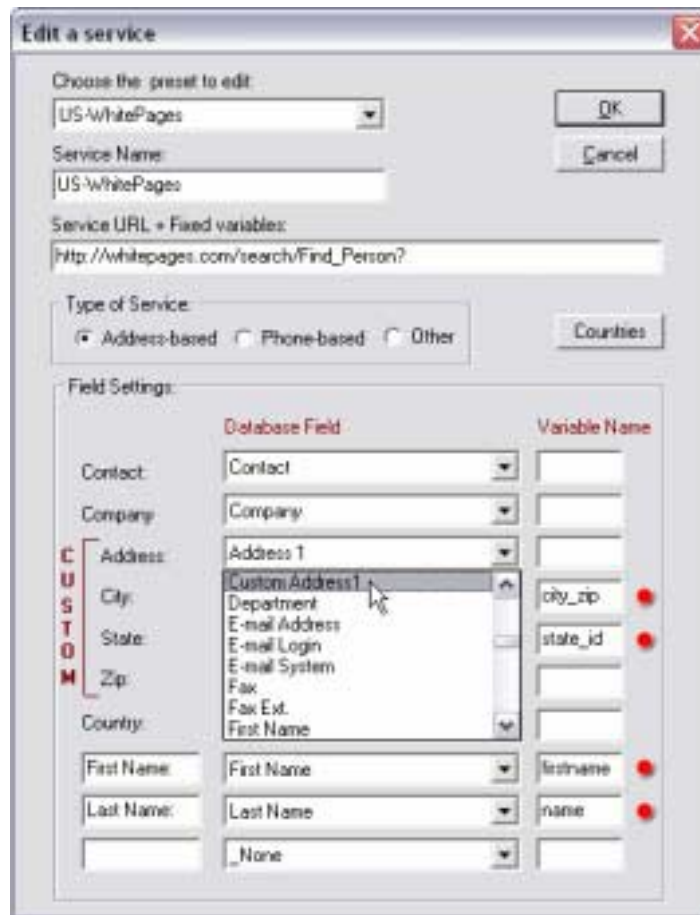
If you have another sets of address fields (besides the Business and Home address), you may use this option to edit Address-based presets in order to define the fields associated with the Custom address option.



Address:

Business  Home  Custom

Then change the Address, City, State and Zip field to your set of address fields



**Edit a service**

Choose the preset to edit:  
 US-WhitePages [OK] [Cancel]

Service Name:  
 US-WhitePages

Service URL + Fixed variables:  
 http://whitepages.com/search/Find\_Person?

Type of Service:  
 Address-based  Phone-based  Other [Countries]

Field Settings:

	Database Field	Variable Name
Contact:	Contact	
Company:	Company	
<b>C</b> Address:	Address 1	
<b>U</b> City:	CustomAddress1	city_zip
<b>S</b> State:	Department	state_id
<b>T</b> Zip:	E-mail Address	
	E-mail Login	
	E-mail System	
	Fax	
	Fax Ext.	
Country:	First Name	
First Name:	First Name	firstname
Last Name:	Last Name	name
	_None	

Editing a service may be useful also if you are missing a field in the Advanced Internet Services window. Let's say you want to use the Thomas Regional directory to grab the number of employees. If you have a # of employees field, add it to the Thomas Regional settings as follows:

The screenshot shows a settings window with four rows of controls. Each row has a label on the left, a dropdown menu in the middle, and a text input field on the right. The second row is highlighted, showing the label '# of empl:' and the dropdown menu set to '# of employees'.

Country:	Country	
Phone	Phone	
# of empl:	# of employees	
	_None	

## Creating a new service

If you can't find the preset you need, you may create it yourself. For this go to the *Services* menu and choose *New service*. Here is the *New Service* window.

The screenshot shows the 'New Service' dialog box. It has a title bar with a close button. The dialog contains several sections: 'Service Name' with a text field and 'OK'/'Cancel' buttons; 'Service URL + Fixed variables' with a text field; 'Type of Service' with radio buttons for 'Address-based' (selected), 'Phone-based', and 'Other'; 'Field Settings' with a table of fields; 'Countries File Location' with a text field and a browse button; and 'Default Country' with a text field.

	Database Field	Phone Format	Variable Name
Contact:	Contact		
Company:	Company		
C U S T O M M Address:	Address 1		
City:	City		
State:	State		
Zip:	Zip		
Country:	Country		
Custom1	_None		
Custom2	_None		
Custom3	_None		

It may seem complex at first. It is not always that difficult.

The best way to create a new service is to connect to the service and create a request. Then note the URL of the result page. Most of the time, you will be able to deduce from this URL how to set up your new service.

For example, imagine you want to connect to hotbusinesses.com directory. On this (fake) web site, you may search for businesses by name. When you do a search, the result page URL is: *http://www.hotbusinesses.com/search.cgi?name=CH Gourmets Gifts&n=20*

You could deduce from this URL that:

- "Service URL and Fixed variables" is *http://www.hotbusinesses.com/search.cgi?n=20*
- The variable name for the company field is "name"

### How did we come to this conclusion?

As a rule, variables are entered after the ?. So everything left to the ? including the ? is part of the URL. Then each variable is displayed using the format *var\_name=field\_value* and separated from the next with a &.

This means that there are 2 variables here: one is called name and is tied to the company name and one is n and its value is 20. Since this value of 20 does not come from our ACT data, it is a fixed variable. Therefore it must be added to the Service URL.

So our new *Hotbusinesses* service settings would look like this:

The screenshot shows a 'New Service' dialog box with the following fields and settings:

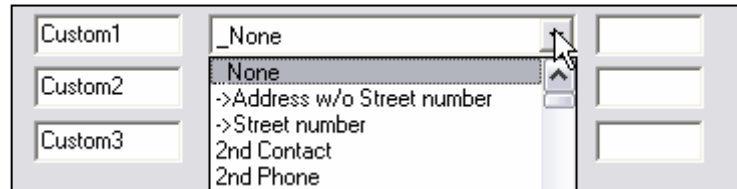
- Service Name:** hotbusinesses.com
- Service URL + Fixed variables:** http://www.hotbusinesses.com/search.cgi?n=20
- Type of Service:**  Address-based,  Phone-based,  Other
- Field Settings:**

	Database Field	Phone Format	Variable Name
Contact	Contact		
Company	Company		name
Address	Address 1		
City	City		
State	State		
Zip	Zip		
Country	Country		
Custom1	_None		
Custom2	_None		
Custom3	_None		
- Countries File Location:** (empty field with a browse button)
- Default Country:** (empty field)

## Special fields for address-based services

You may use up to 3 custom fields besides the address fields. Depending on the type of service created, you have special fields available for custom fields.

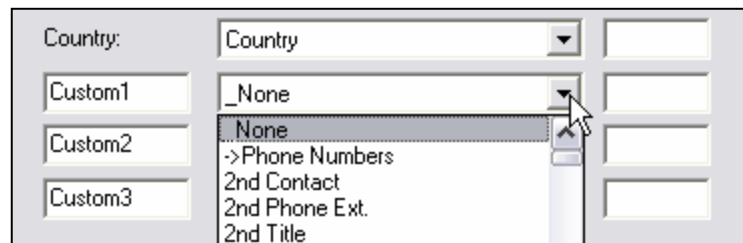
When you create or edit an **address-based service**, the 3 custom fields have a couple of special fields listed at the top of the dropdown list:



The field "->Street number" is made of any numeric digits starting the first line of the address of any. The field "->Address w/o Street number" is the rest of the address field. These 2 fields might be useful for I. S. doing Phone lookup by address for instance.

## Special fields for phone-based services

When you create or edit a Phone-based service, the 3 custom fields dropdown lists therefore do not display any phone fields but rather a generic "->Phone numbers" field.



Since some Phone-based I.S. will ask that you split the area code from the rest of the number, you have the option to select the digits of the phone number that you want included in each field.

Here is how these custom fields can be set up in the New service or Edit service window.



When you select "->Phone Numbers", an extra text box appears to its right where you may enter the format of the phone number. Since the I. S. do not want any not-numeric characters, enter the digit positions separated with commas.

For a US type phone number, area code would be "1,2,3" and the local phone # would be "4,5,6,7,8,9,10" (without quotes).



Ex: the phone number is (212)555-1234

1,2,3 returns: 212

4,5,6,7,8,9,10 returns 5551234

Note: Phone directories are not phone-based services but rather address-based services (since you need an address to find a phone number).

## Countries File

Note that most I.S. needing country names use codes for countries, like US for United States, UK or GB for United Kingdom. To establish a link between these codes and the data contained in your database, create a text file with the same structure as the "countries\_mapquest.txt" and "countries\_yahoo.txt" files located in the add-on folder and associate them to your I. S. settings using the Countries File Location box at the bottom of either the New service or Edit service window.

**Note:** If you can't figure out how to create a new service, then let us know at [support@exponencial.com](mailto:support@exponencial.com) and we might be able to create that service for you and add it to our FTP server.

## Adding an icon or a menu item to ACT! to launch Advanced Internet Services

As with any of our add-ons, go to the *Options / Integrate with ACT!* menu to display this window and add icons or menu items as needed. Menu items are added to the Tools menu.



## Support

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For support, please contact [support@exponencial.com](mailto:support@exponencial.com).

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