

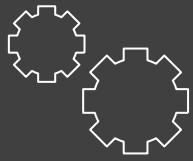


LeadGrabber



URDHVA TECH

Version 4.0.1



KEY FEATURES

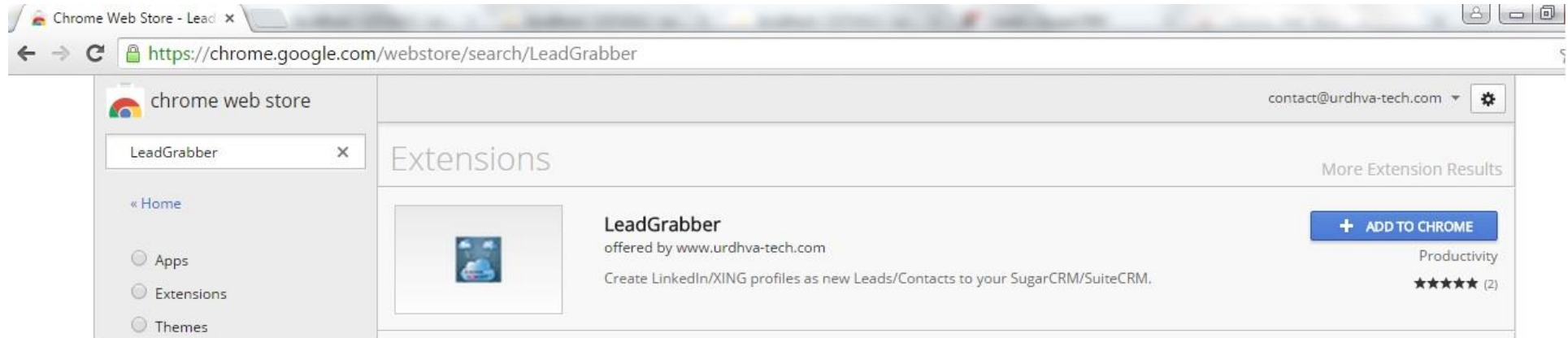
- ✓ Import LinkedIn profile to SugarCRM or SuiteCRM
- ✓ Import Xing profile to SugarCRM or SuiteCRM
- ✓ Identify the duplicate records and allow user to merge record.
- ✓ Get the profiles either Contact or Lead in to SugarCRM or SuiteCRM
- ✓ Assign Lead directly to Sales User
- ✓ Relate profile to specific Target List
- ✓ Jump to view the record in CRM at a click of button

Introduction

LeadGrabber is Chrome Extension which is free to download. Transferring LinkedIn® and XING® profile information to SugarCRM or SuiteCRM. The extension only fetches the information that is publically available on the LinkedIn / XING user's page.

How to get the plugin?

- The extension is available at Chrome extension market. Search for Lead Grabber in chrome web store.



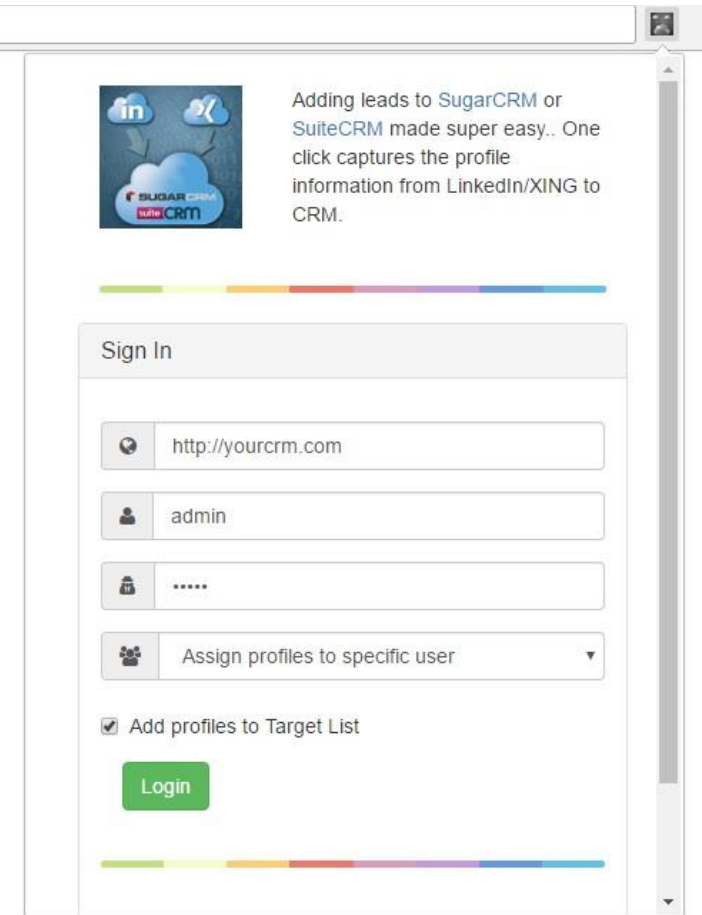
Click on ADD TO CHROME button. It will be installed automatically.

Social media

- Lately social media is being used widely to reach to likeminded people and LinkedIn has been the best for reaching to trusted and well versed professionals over internet.
- There is an old saying "Time is money" – we extend it and say "Invest it wisely".
- Invest more time to hunt the best people on LinkedIn and less – way less time on actually saving it to your CRM system!
- All saved time on data-entry can be best utilize in getting to know your leads better – call them – email them – anything, get the ball rolling.
- The small – teeny tiny – extension to your Google Chrome will save you time = money.
- The public information pulled and stored includes – First Name, Last Name, Company Name, Title, Phone, Mobile, Website, and Email address, isn't it great?
- After success of Lead grabber for LinkedIn®, we are now extending the facility to grab the leads from another social media, i.e. XING®.

LeadGrabber Configuration

- Locate the icon of Lead Grabber on your browser. Click and fill required credentials for SugarCRM or SuiteCRM. If your credentials are correct, you are done!



The screenshot shows a web browser window. The main content area displays the Google India homepage with the Google logo, a search bar, and buttons for "Google Search" and "I'm Feeling Lucky". Below the search bar, there is a line of text in multiple languages: "Google.co.in offered in: हिन्दी बांग्ला डेलुगु मराठी தமிழ் ગુજરાતી ಕನ್ನಡ മലയാളം ਪੰਜਾਬੀ". On the right side of the browser, there is a sidebar. At the top of the sidebar, there is a logo for "LeadGrabber" which includes icons for LinkedIn and XING, and text that says "Adding leads to SugarCRM or SuiteCRM made super easy.. One click captures the profile information from LinkedIn/XING to CRM." Below this is a horizontal bar with a rainbow gradient. Underneath the bar is a "Sign In" section. It contains four input fields: the first is for the CRM URL with the placeholder "http://yourcrm.com", the second is for the username with the placeholder "admin", the third is for the password with the placeholder ".....", and the fourth is a dropdown menu labeled "Assign profiles to specific user". Below these fields is a checkbox labeled "Add profiles to Target List" which is checked. At the bottom of the sign-in section is a green "Login" button. Another horizontal bar with a rainbow gradient is at the very bottom of the sidebar.

- ❖ CRM URL: http://site_url (w/o index.php)
- ❖ User Name: Valid user name of system

❖ Password: Valid password of user

❖ Assign User:

- Assign profiles to specific user
- Assign profiles to yourself

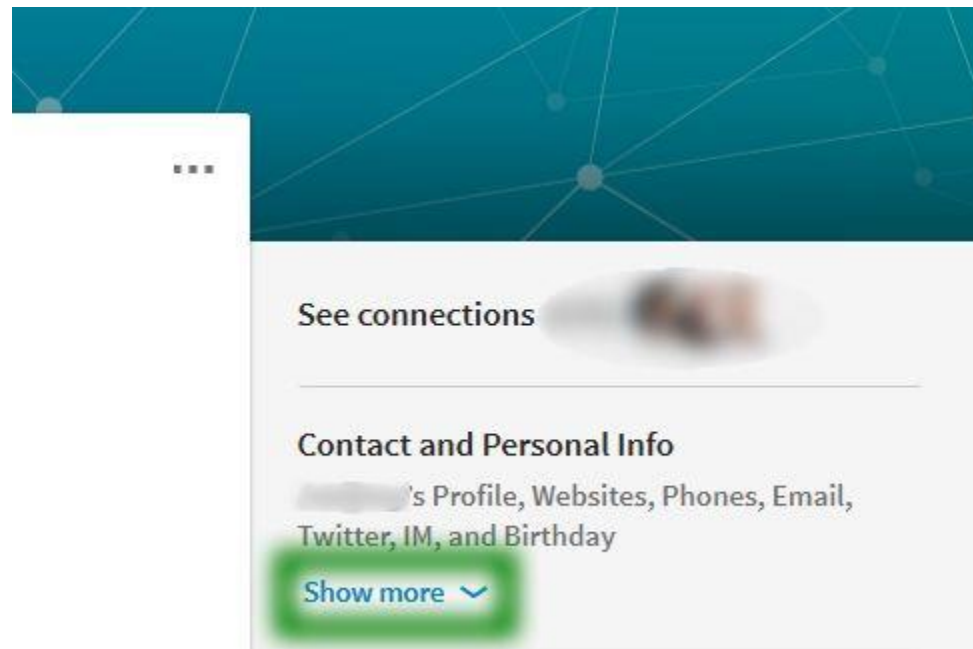
❖ Add profiles to Target List: If you wish to add created Lead or Contact to specific **target list**. You will have list of Target List from CRM.

Usage of the Extension


- Browse to a LinkedIn / Xing user profile and you will have blue Lead Grabber Icon click on that icon on add-on bar.
- Add on will grab the information from the profile and populate data on Lead Grabber popup. You can edit any information before sending it to SugarCRM / SuiteCRM.
- At the bottom of popup you will have dropdown option to "Save as" Lead/Contact.


The screenshot shows a LinkedIn profile for Clint Oram, Co-founder and CMO of SugarCRM. The profile includes a header with the LinkedIn logo, a search bar, and navigation links (Home, My Network, Jobs, Messaging, Notifications, Me). Below the header is a banner image and a profile picture. The main section displays the name 'Clint Oram', title 'Co-founder and CMO, SugarCRM', and location 'San Francisco Bay Area'. There are 'InMail' and 'Connect' buttons. Below this is a section for 'Clint's Posts & Activity' showing a post about 'Four Steps to Beating the Big Boys and Challengi...'. To the right, a 'Lead Grabber' extension popup is open, titled 'Populate fields to CRM'. It contains a form with fields for 'Clint', 'Oram', 'Co-founder and CMO, S', 'SugarCRM', 'Phone', 'Mobile', 'Website', 'clint@sugarcrm.com', 'Primary Address Country', 'Experience', 'CMO', 'Lead Source Description', 'Tech Fest Meet up', and 'Administrator'. A 'Save As' button is at the bottom of the popup, with a dropdown menu showing 'Lead' and 'Contact' options. The background also shows a 'Connect co-worker' section with a 'Add your position' button and a 'People Also Viewed' section with profiles of Larry Augustin and Jennifer Nance Stagnaro.


- Once you click on Save as **Lead/Contact**, you will have message "Lead created successfully". You will have link for opening record into CRM next to "Done" button. Once record is saved, icon of Lead Grabber turns it to **green color** for that profile only and it won't allow you to enter it again.
- If you checked **Add profiles to target list** during setting screen, you will have dropdown of available target list to select. It will automatically add created Lead or Contact to selected target list.
- **Recently LinkedIn has redesigned its site.** It is complete redesigned with a simpler, app-like look and updated search features.
- With the changes made by LinkedIn in showing profiles in a new way, You may have noticed that on new profile layout all the information are not prepopulated at once. You have to keep scrolling down the profile to see more information which loads rest of the profile information. Also you have to click on 'Show more' which loads up Phones, Emails, Public profile URL etc.





Contact and Personal Info


 [Redacted] 's Profile
[Redacted]
[Redacted]


 Website
[Redacted]

 Phone
[Redacted]

 Email
[Redacted]

 Twitter
[Redacted]

 IM
[Redacted]

 Birthday
[Redacted]

These values will be saved into CRM's "Description" field.

- With this restriction of loading data, The LeadGrabber will only be able to retrieve data that is available on the page. So if you are looking for retrieving more information of the profile you have to preload all the information on the screen by scrolling down and clicking on 'Show more', Before you send the profile information to CRM.

➤ LeadGrabber will also save following listed LinkedIn profile section into CRM's "Description" field.

- ❖ Experience
- ❖ Patents
- ❖ Featured Skills & Endorsements
- ❖ Languages
- ❖ Education
- ❖ Certifications
- ❖ Publications
- ❖ Volunteering Experience & Causes



Search



Home



My Network



Jobs



Messaging



Notifications



Me



2nd

Clint Oram

Co-founder and CMO, SugarCRM

SugarCRM • California Polytechnic State University-San Luis Obispo
San Francisco Bay Area • 500+

InMail

Connect

See more

Highlights

1 Mutual Connection

You and Clint both know J

Clint's Posts & Activity

5,441 followers

+ Follow



Four Steps to Beating the Big Boys and Challengi...
Clint Oram on LinkedIn



Next-gen CRM: Changing the customer relations game in the Digital Age | #theCUBE -...
Clint liked



We are hiring in Munich and Sydney. Looking for those who are, or who want to be, CRM...
Clint shared



The Trump administration just had a 'let them eat cake' moment on national TV

Contact and Personal Information



Clint's Profile
linkedin.com



Twitter
sugarclint

Show less

Profile added to CRM.

Clint

Oram

Co-founder and CMO, S

SugarCRM

Phone

Mobile

Website

clint@sugarcrm.com

Primary Address Country

Experience
CMO

Lead Source Description

Tech Fest Meet up

Administrator

Done View In CRM



Find your next opportunity

Update your profile

People Also Viewed



Larry Augustin • 2nd
CEO at SugarCRM



Jennifer Nance Stagnaro • 3rd
CMO at Stagnaro Strategic Marketing

DetailView In CRM

Accounts

Contacts

Opportunities

Leads

Calendar

Reports

Quotes

Documents

Emails

Campaigns

Calls

Meetings

Tasks

Notes

Forecasts

Cases

Targets

Search

Q

0

Co

Clint Oram

☆

Following

Edit

Title

Co-founder and CMO, SugarCRM

Department

Account Name

SugarCRM

Tags

Primary Address

Fax

Twitter Account

Description

Experience

CMO

SugarCRM

Apr 2004 – Present * 12 yrs 11 mos * Cupertino, CA

CMO & Head of Corporate Development June 2016 - presentLeading marketing and corporate development strategy across the marketing and alliances teams.CTO & Head of Business Development 2012 - June 2016Led technology and corporate development strategy including alliances, channel sales and business development teams.CTO & VP Products 2008 - 2012Led product...

more

Reports To

Lead Source

Campaign

Language Preference

English (US)

Date Modified

02/09/2017 02:34pm by Administrator

Date Created

02/09/2017 02:34pm by Administrator

Mobile

Do Not Call

☐

Email

clint@sugarcrm.com

Alternate Address

Office Phone

D&B Principal Id

Sync to Mail Client

☐

Assigned to

Administrator

Teams

Global (Primary)

Merge Duplicate

- While saving new record, if similar email address is found with the Account Name or Primary Address Country for Leads and if similar email address is found with the Primary Address Country for Contacts into the SugarCRM / SuiteCRM, LeadGrabber will warn you about possible duplication.

You will have list of duplicate records to merge with existing record. You can also either cancel it out or ignore the duplication and create new record.

The screenshot shows a LinkedIn profile for Larry Augustin, CEO at SugarCRM. A modal window titled "Duplicate Found" is overlaid on the right side of the profile. The modal contains the following information:

There are just 1 number(s) of record exist with
Email Address : **clint@sugarcrm.com**
Account Name : **SugarCRM**

Name	Account Name	Country	Email	Merge
Clint Oram	SugarCRM		clint@sugarcrm.com	Merge

At the bottom of the modal, there are two buttons: "Close" and "Ignore Duplicate And Create New".


The background profile shows Larry Augustin's profile picture, name, title, and company. Below the profile picture, it says "2nd" and "Follow". The "Experience" section lists his role as CEO at SugarCRM from May 2009 to Present (7 yrs 10 mos). The "Member of the Board of Directors" section lists his role at Appcelerator from May 2009 to Present (9 yrs 4 mos).

www.linkedin.com/in/larryaugustin/

in Search

Home My Network Jobs Messaging Notifications Me


2nd

Larry Augustin
CEO at SugarCRM
SugarCRM • Stanford University
San Francisco Bay Area • 500+ 

Follow


Experienced entrepreneur and venture capitalist who enjoys helping fellow entrepreneurs build their companies. Primarily interested in helping early stage startups build their business plan, raise funding, and recruit a ... [See more](#)

Experience


CEO
 SugarCRM
May 2009 – Present • 7 yrs 10 mos


SugarCRM makes CRM Simple. As the world's leading provider of open source customer relationship management (CRM) software, SugarCRM applications have been downloaded more than seven million times and currently serve over 600,000 end users in 80 languages. Over 6,000 customers have chosen SugarCRM's On-Site and Cloud Computing services over proprietary alternatives. SugarCRM has been recognized for its customer success and product innovation by CRM Magazine, InfoWorld, Customer Interaction Solutions and Intelligent Enterprise.


[See less](#)

Member of the Board of Directors
 Appcelerator
May 2009 – Present • 9 yrs 4 mos

Contact and Personal Information

 Larry's Profile
[linkedin.com](#)

 Website
[lmaugustin.com](#)


 Twitter
[lmaugustin](#)


[Show less](#)

Merge with existing record from CRM.

CRM Field	LinkedIn Field
Clint	Larry
Oram	Augustin
Co-founder and CMO, S	CEO at SugarCRM
SugarCRM	SugarCRM
Phone	Phone
Mobile	Mobile
Website	http://lmaugustin.com
	clint@sugarcrm.com
Primary Address Country	Primary Address Country
Experience	Summary
CMO	Experienced
Lead Source Description	Lead Source Description

People Also Viewed

 **Clint Oram** • 2nd
Co-founder and CMO, SugarCRM

 **Fred Gewant** • 3rd

vimeo business
Grow your business
[Join now](#)

Here you can merge field one-to-one with existing records by just click on arrow key. You will have control over merge records while duplicate found!

Create Lead/Contact via Xing

The screenshot shows the Xing profile of Lars Hinrichs, a Premium member. The profile includes a photo, name, title 'Founder & Executive Geek', company 'HackFwd Hamburg, Germany', and role 'Executive'. It also displays statistics: 999+ Contacts, 95% Activity, and 0 Match. A sidebar on the left contains navigation links like 'Profile details', 'Other web profiles', 'Contacts', and 'Groups'. A 'Haves' section lists skills and interests such as 'new finance product - for geeks only', 'good network', 'entrepreneurial expertise', 'social networking', 'Web2.0', 'contacts', and 'investments'. A 'Wants' section lists 'Europe's most passionate geeks' and 'talents for a new company'. A CRM overlay is visible on the right, titled 'Profile added to CRM.', which contains a form for adding contact information. The form includes fields for Name (Lars Hinrichs), Title (Founder & Executive Geek), Company (HackFwd), Phone, Mobile, Email, Website (http://hackfwd.com), Primary Address Country, and a dropdown for Lead Source (Tech Fest Meet up). It also has a 'Lead Source Description' field and a 'Done' button.

richs

Find jobs, contacts, events... Advanced Search Find new

> Lars Hinrichs

Lars Hinrichs PREMIUM
Founder & Executive Geek
HackFwd Hamburg, Germany
Executive

999+ Contacts 95% Activity 0 Match

Follow me on Twitter: <http://twitter.com/LarsHinrichs>

My notes for Lars Hinrichs

Profile details

Other web profiles

Contacts

Groups

Haves

new finance product - for geeks only good network Introduction into my Network

entrepreneurial expertise social networking Web2.0 contacts investments

Wants

Europe's most passionate geeks talents for a new company

Profile added to CRM.

Lars Hinrichs

Founder & Executive Geek HackFwd

Phone Mobile

<http://hackfwd.com> Email

Primary Address Country

Haves

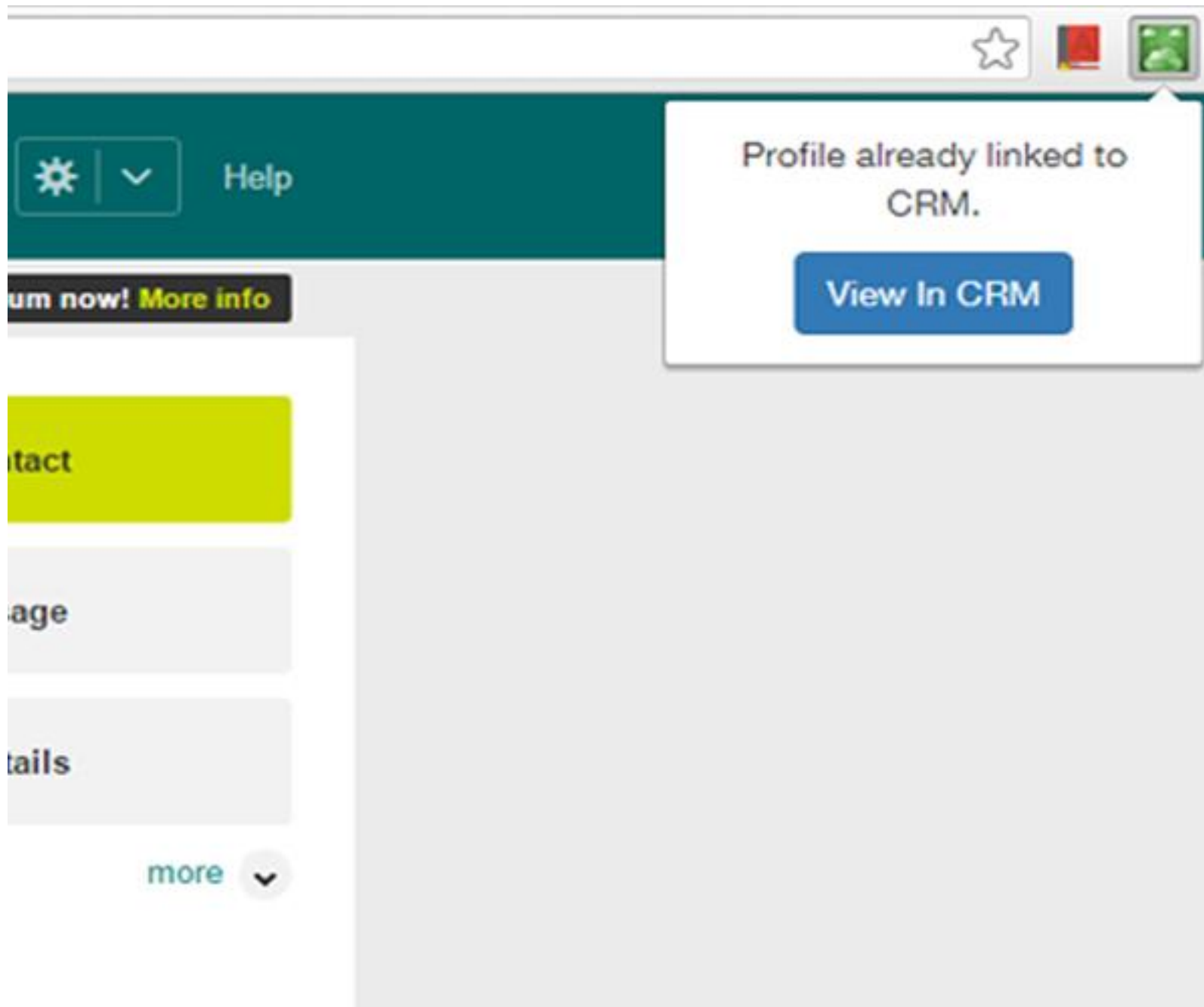
Lead Source Description

Tech Fest Meet up Administrator

Done View In CRM

As in LinkedIn, You can also create Lead/Contact via XING profile too.

If profile is already exist, you will have option to go directly to the detail of that record into your CRM.





URDHVA TECH

CONTACT US



CONTACT@URDHVA-TECH.COM



[URDHVATECH](https://t.me/URDHVATECH)



[@URDHVATECH](https://twitter.com/URDHVATECH)