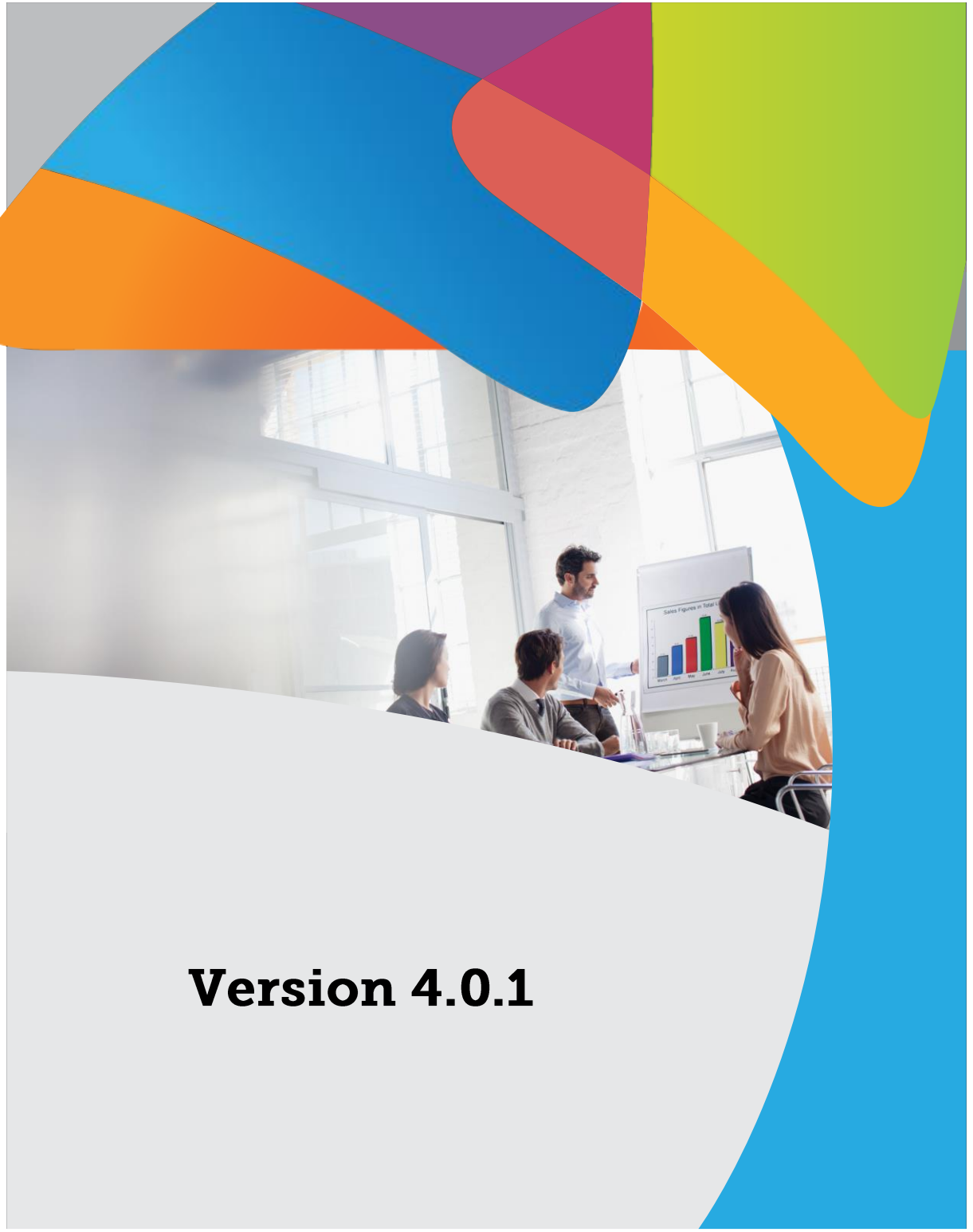
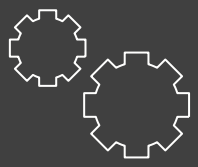
LeadGrabber



Version 4.0.1

URDHVA TECH



KEY FEATURES

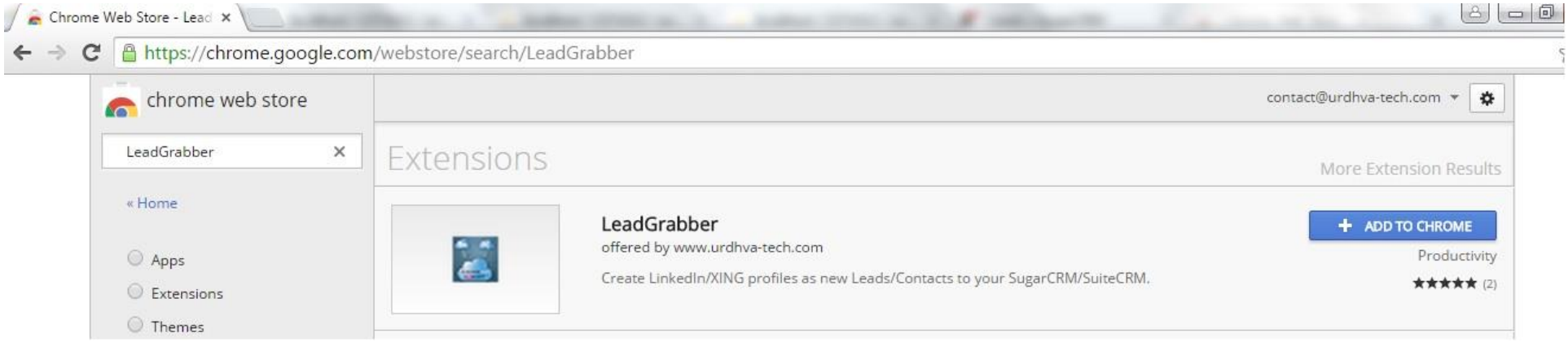
- ✓ Import LinkedIn profile to SugarCRM or SuiteCRM
- ✓ Import Xing profile to SugarCRM or SuiteCRM
- ✓ Identify the duplicate records and allow user to merge record.
- ✓ Get the profiles either Contact or Lead in to SugarCRM or SuiteCRM
- ✓ Assign Lead directly to Sales User
- ✓ Relate profile to specific 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.



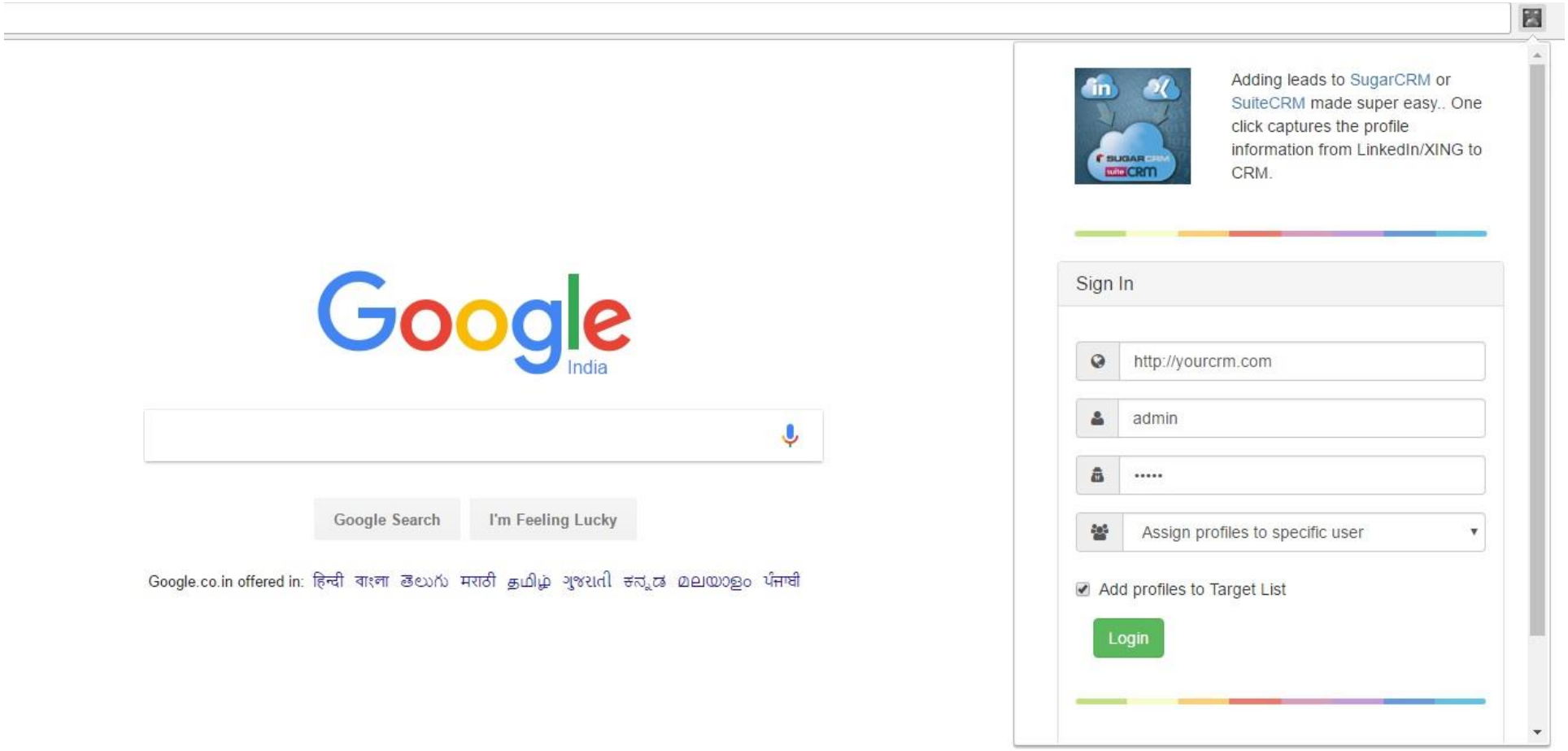
Click on ADD TO CHROME button. It will be installed automatically.

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!

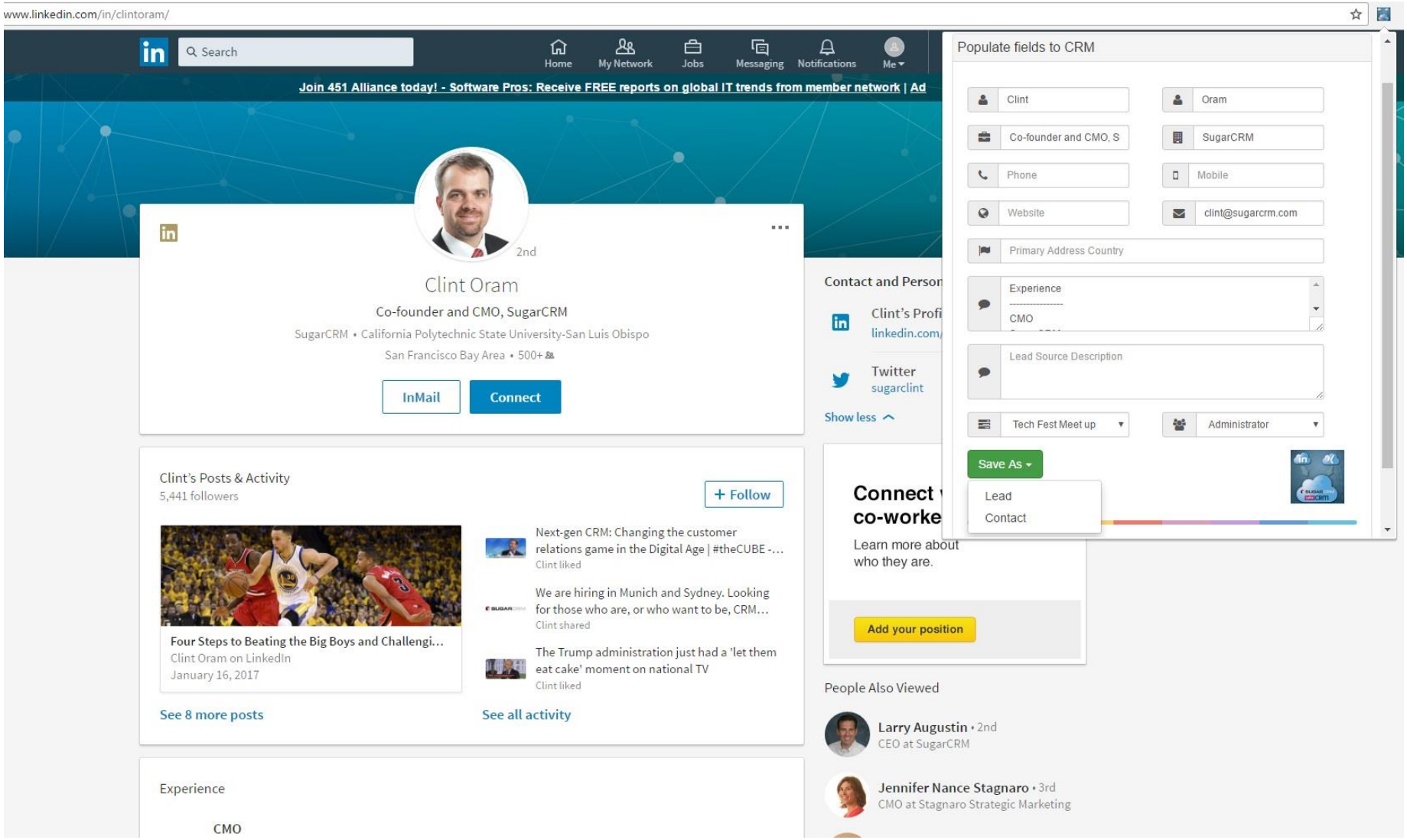


- CRM URL: http://site_url (w/o index.php)
- User Name: Valid user name of system

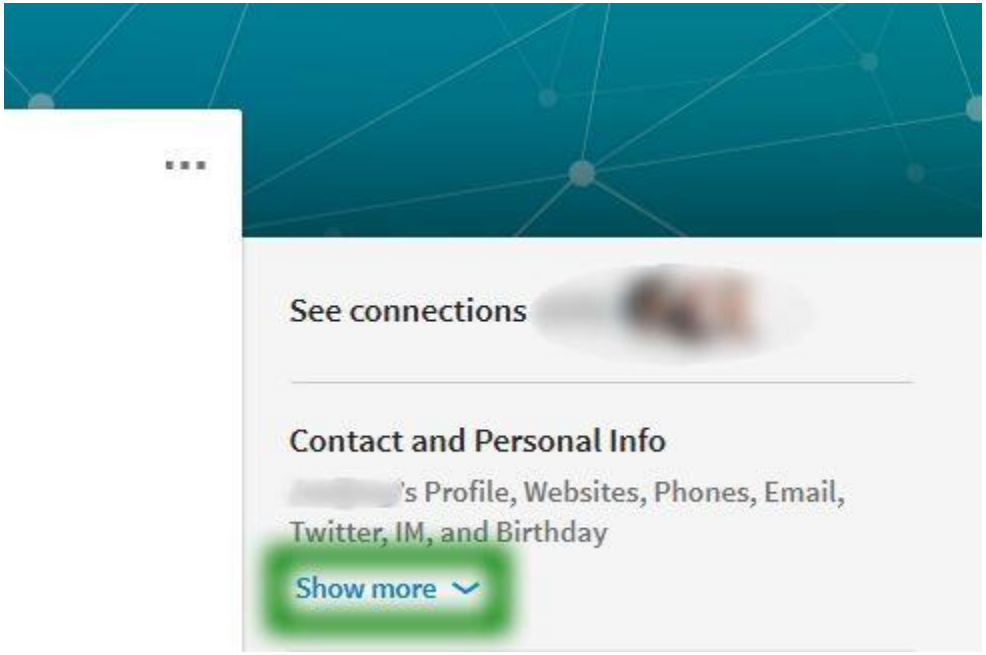
- Password: Valid password of user
- Assign User:
    - Assign profiles to specific user
    - Assign profiles to yourself
- Add profiles to Target List: If you wish to add created Lead or Contact to specific target list. You will have list of Target List from CRM.

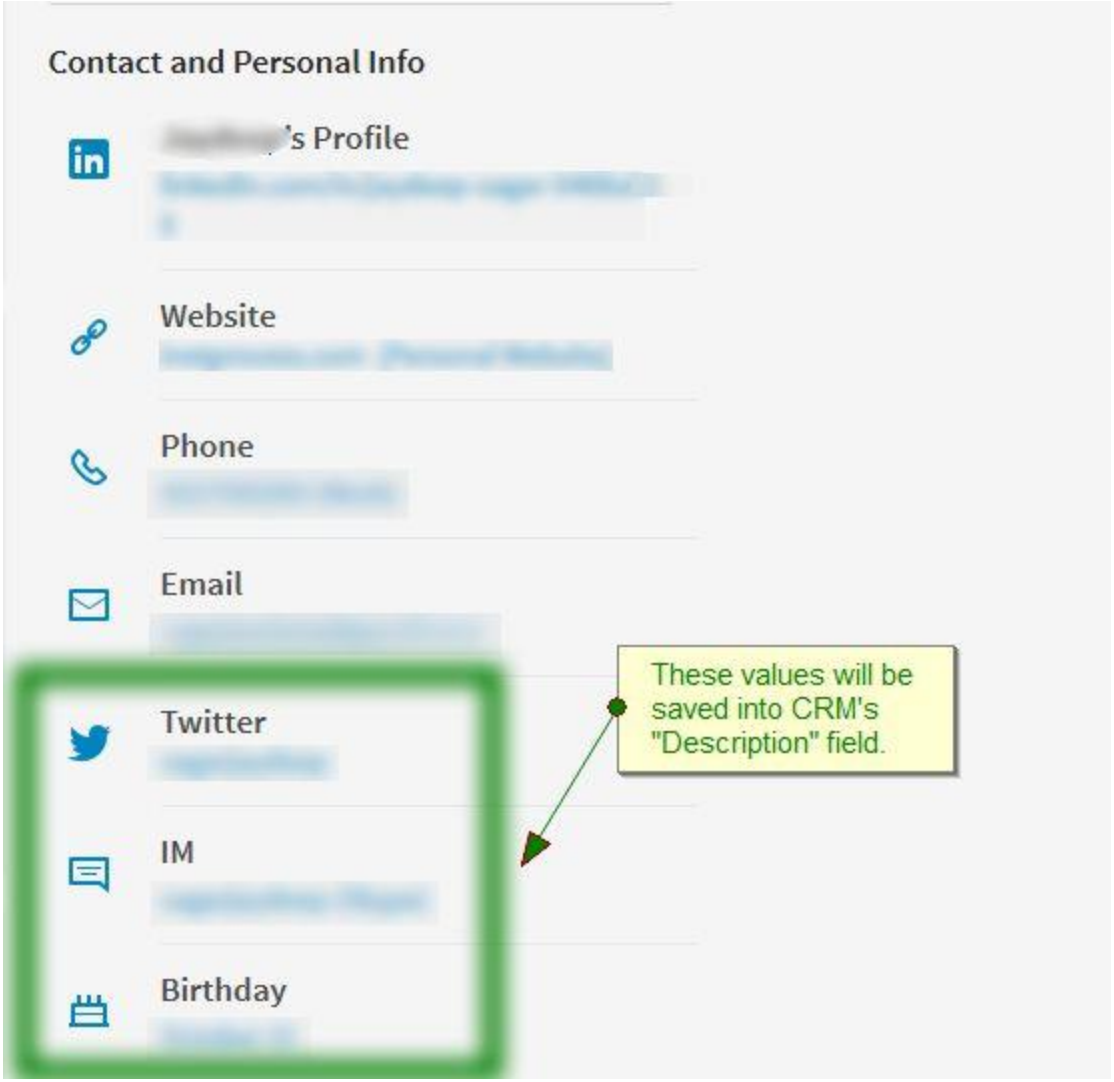
Usage of the Extension

- 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.



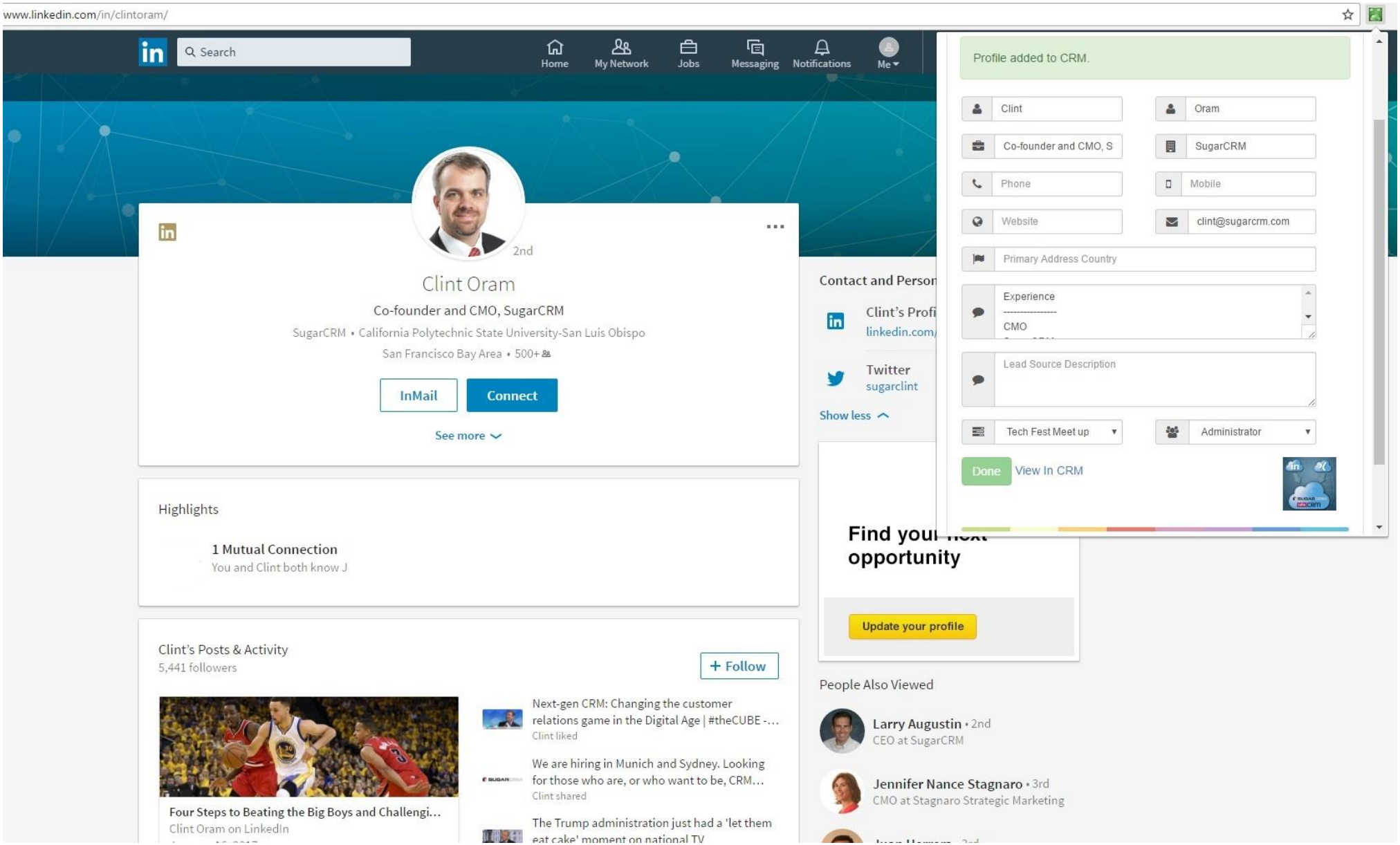
- Once you click on Save as Lead/Contact, you will have message “Lead created successfully”. You will have link for opening record into CRM next to “Done” button. Once record is saved, icon of Lead Grabber turns it to green color for that profile only and it won’t allow you to enter it again.
- If you 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.



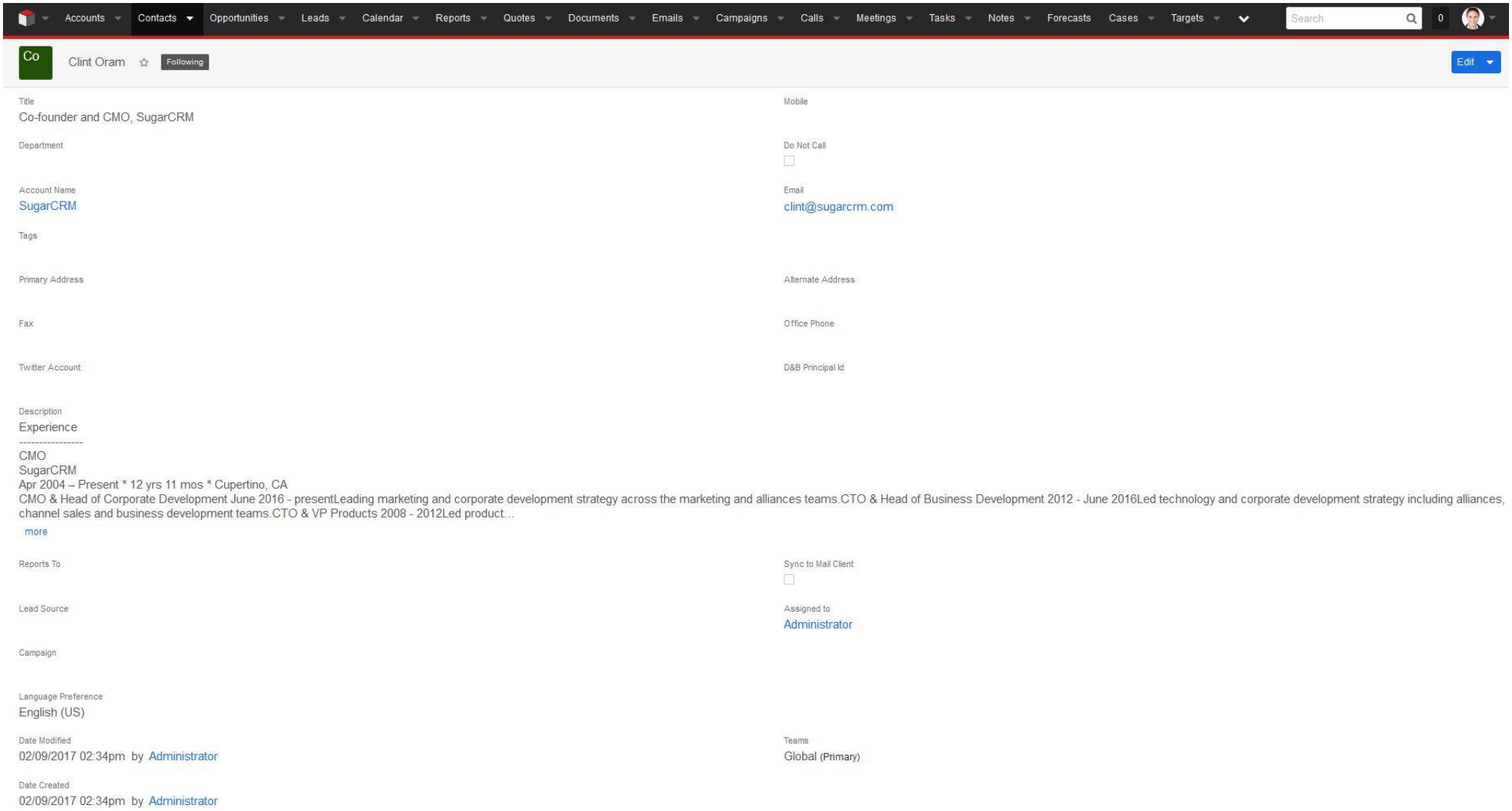


- With this restriction of loading data, The LeadGrabber will only be able to retrieve data that is available on the page. So if you are looking for retrieving more information of the profile you have to preload all the information on the screen by scrolling down and clicking on 'Show more', Before you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


www.linkedin.com/in/clintoram/
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 Person
Clint's Profi
linkedin.com/
Twitter
sugarclint
Show less
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
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

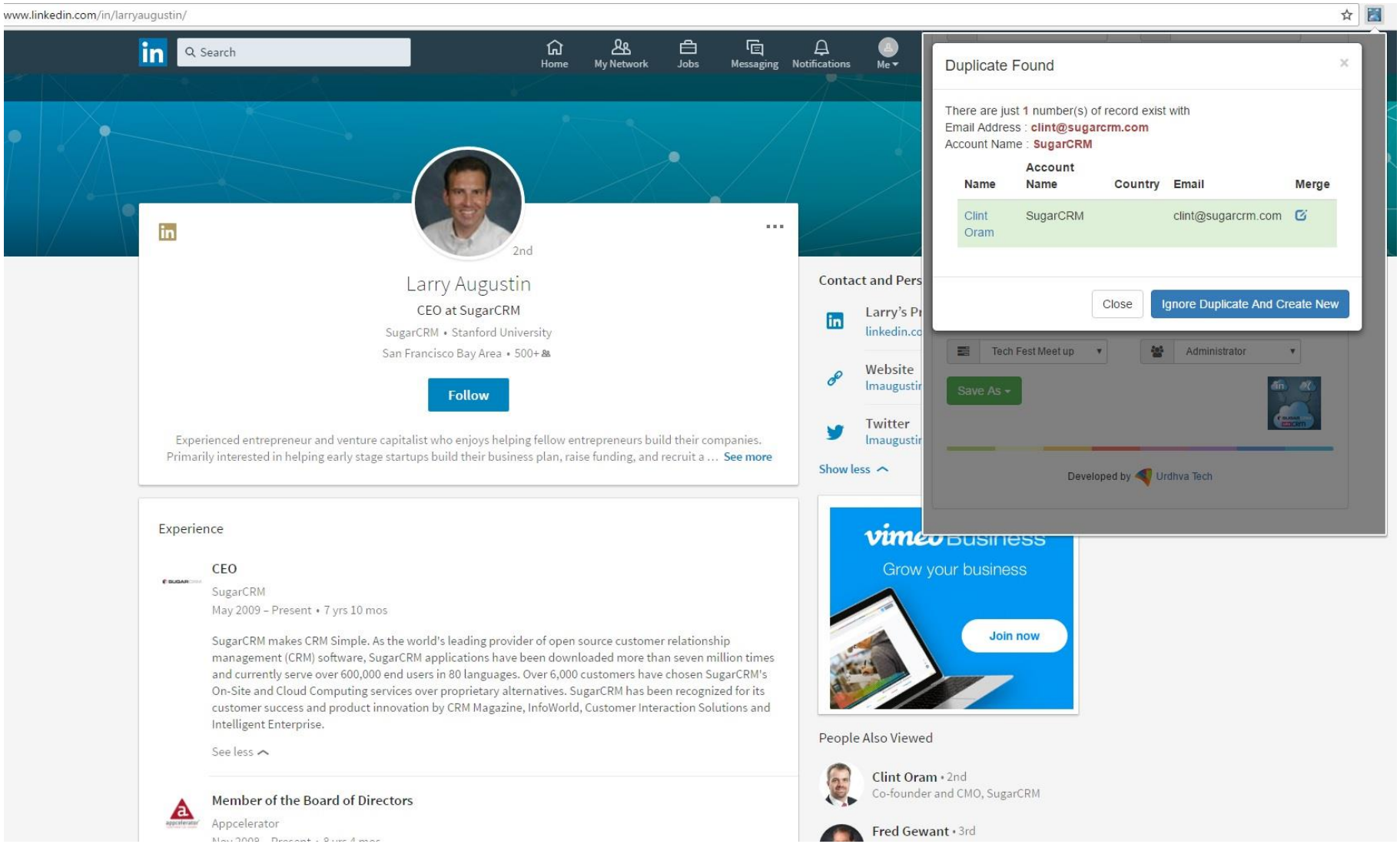
DetailView In CRM

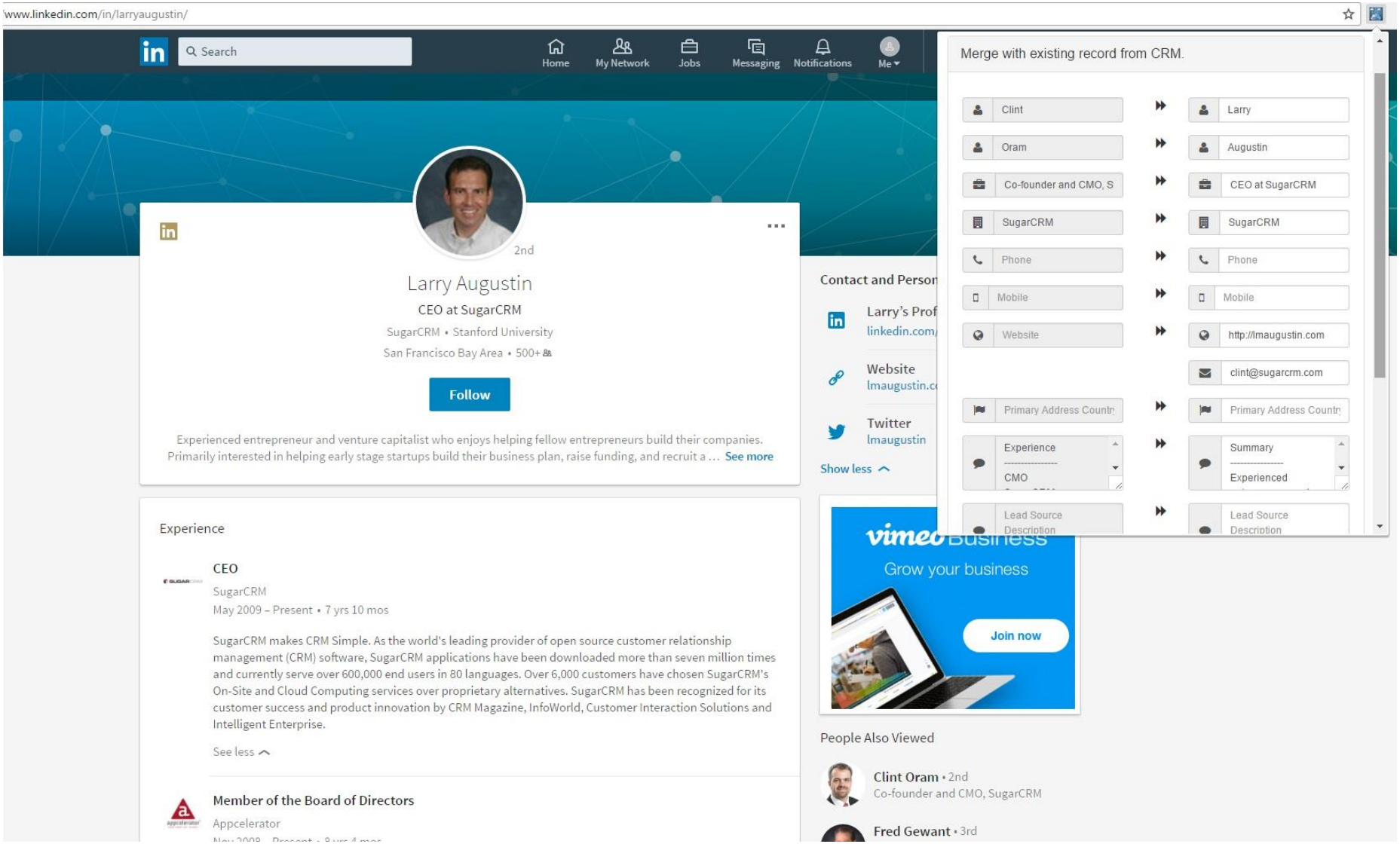


Merge Duplicate

- 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.

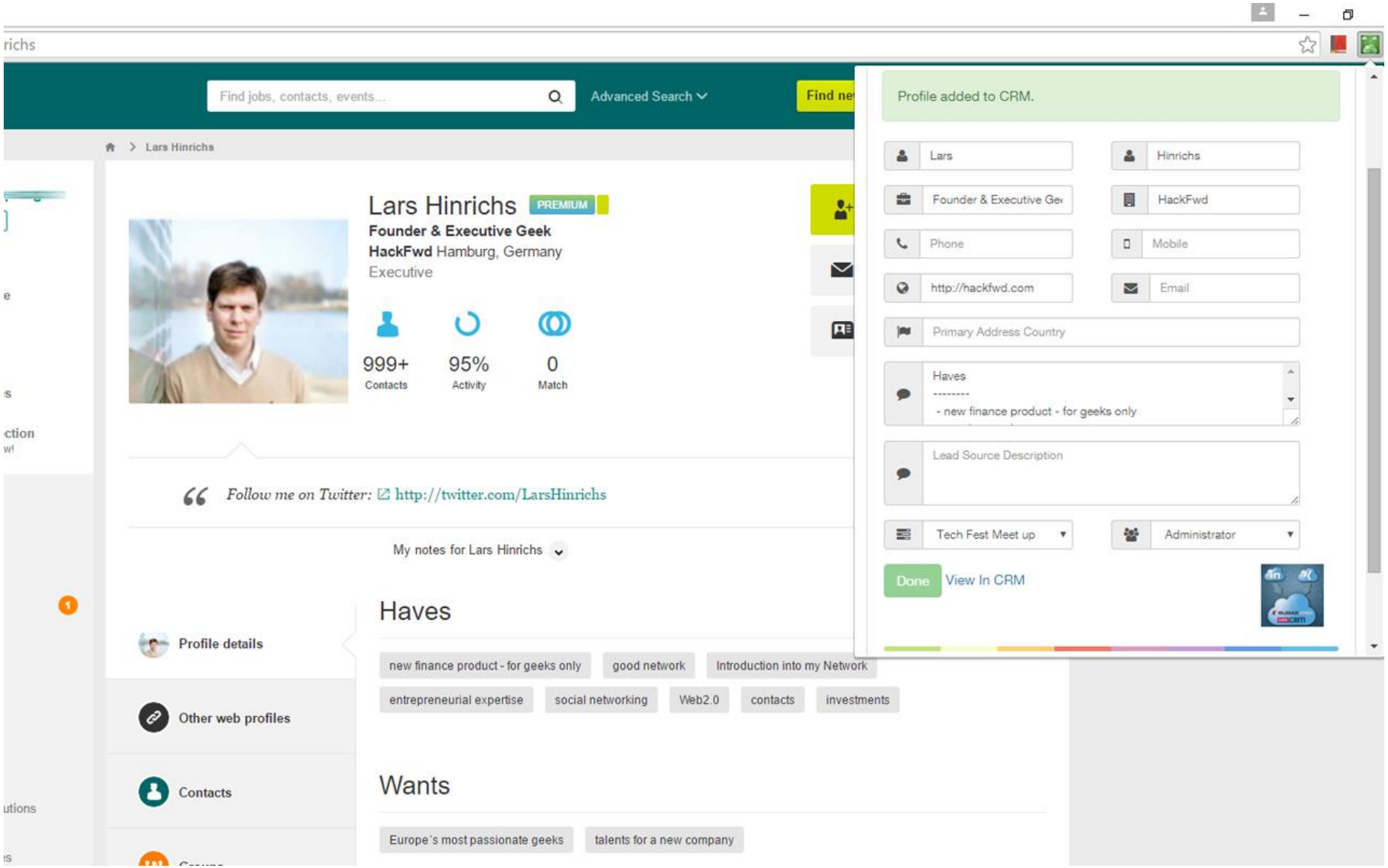
You will have list of duplicate records to merge with existing record. You can also either cancel it out or ignore the duplication and create new record.





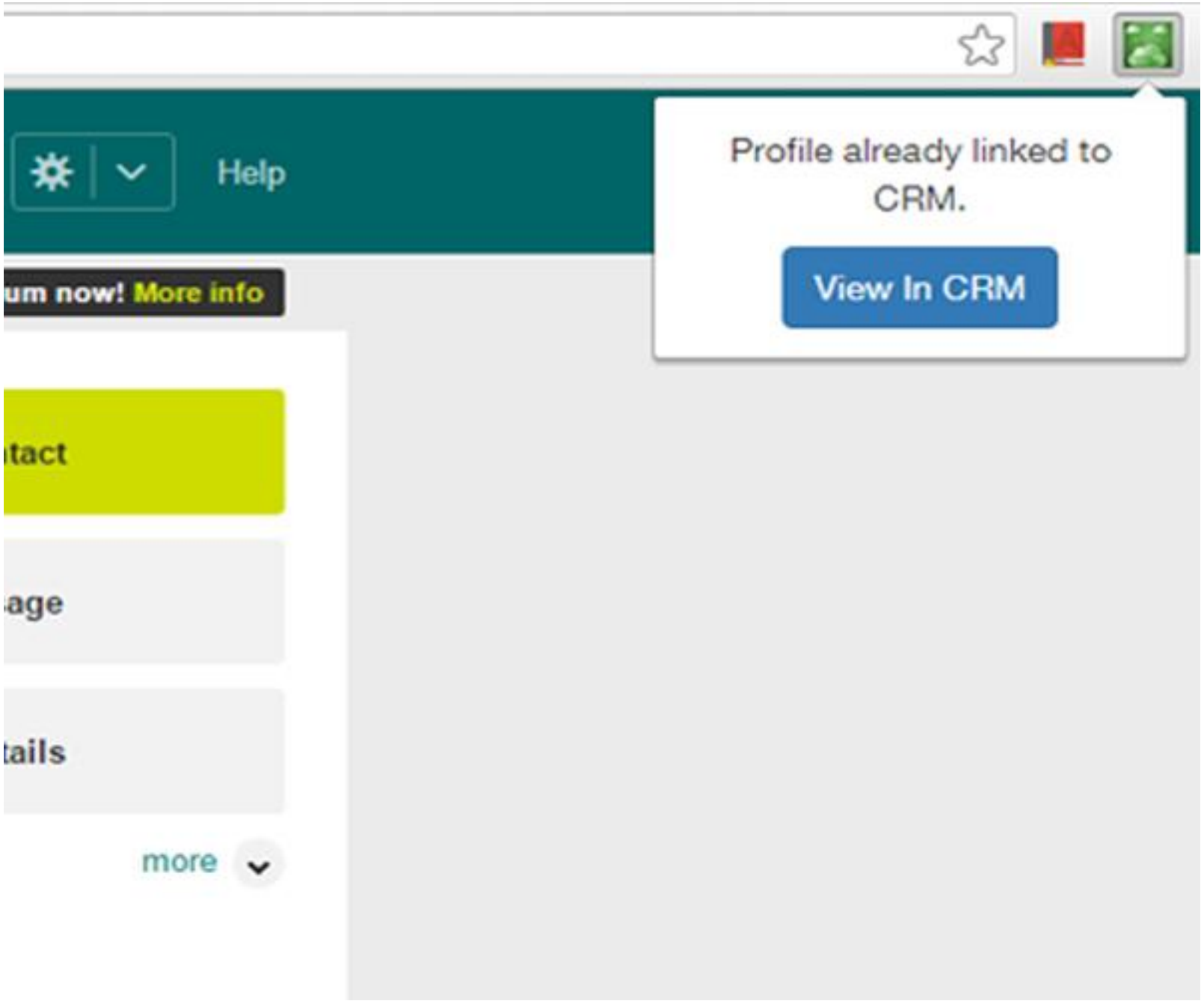
Here you can merge field one-to-one with existing records by just click on arrow key. You will have control over merge records while duplicate found!

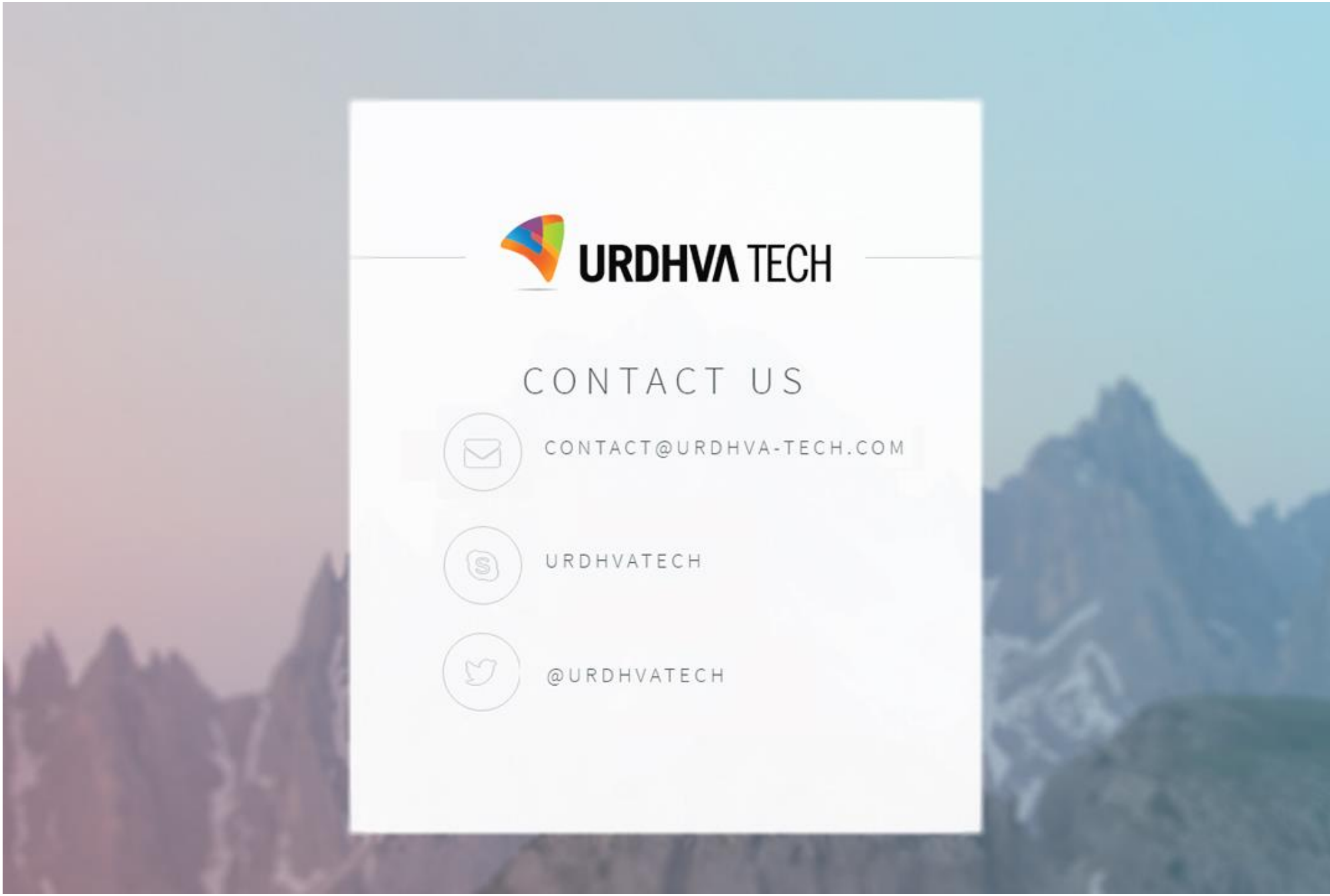
Create Lead/Contact via Xing



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
@URDHVATECH