Getting Started with CardScan

Welcome to CardScan!

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Chapter 4 Copying Contacts to and from Palm OS™ Handheld Devices

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Welcome to CardScan!

CardScan enables you to turn business cards into an accurate and efficient electronic address book. You can then use your CardScan address book as fits your work style; for example:

- Make CardScan your Contact Manager. See *"Using CardScan as Your Contact Manager" on page 2-1.*

- Copy contacts to and from your favorite contact manager (for example, Microsoft Outlook), or a Palm OS™ handheld device, or a Pocket PC® device. These options are illustrated *on page 2*.

What's New

If you have used CardScan before, here is what's new in this release:

- Improved Accuracy
- Modernized, more intuitive and task-oriented Graphical User Interface
- Verification features
- Duplicates Wizard

Information and Instructions

If you need more information, instructions, troubleshooting hints, etc., we recommend you approach your resources in this order:

Online Help	Use the online help for detailed descriptions of CardScan features, instructions, and troubleshooting tips. For help with dialogs, click **Help** on the dialog. The dialog help is displayed in a tri-pane window, with tabs for Contents, Index, Search, and Glossary. You can also access the help by pressing the F1 key on your keyboard or from CardScan's **Help** menu.
CardScan Website	Visit www.cardscan.com for: • Software updates • Documentation downloads • Knowledge Base, maintained by Technical Support
CardScan Technical Support	For information on contacting Technical Support, please see *Appendix B: "CardScan Technical Support"* .

CardScan Features at a Glance

Create CardScan Address Book (See *page 1-1*)

Scan business cards into a CardScan file, and use Accuracy Features to verify the accuracy of your contacts.

Copy contacts to and from your **Palm** Handheld. See *page 4-1.*

Copy contacts to and from **Microsoft Outlook** or another Contact Manager. See *page 3-1.*

Copy contacts to and from your **Pocket PC**. See *page 5-1.*

Manage your Contacts with CardScan (See *page 2-1*)

- Add contacts without business cards
  - Drag and drop contacts from other applications and Web sites.
  - Import files from other applications.

- Add information to existing contacts
  - Phone and Fax numbers
  - Email and Web addresses
  - 2nd Street Address
  - Notes

- Organize contacts
  - Find and remove duplicates with the Duplicates Wizard.
  - Categorize contacts.
  - Split and merge files.
  - Move and copy contacts from one file to another.

- Find contacts with
  - QuickSearch
  - Categories

- Safeguard your contacts with the Backup Wizard.

- Save your file to a secure account on CardScan.Net to have:
  - Back up and access to your contacts from anywhere, anytime
  - Updates to contact information, provided automatically by contacts themselves

- Reach one or multiple contacts quickly
  - Create an email, dial a phone number, launch your browser to a contact's web page, or get directions from MapQuest—with a mouse-click in the Summary view.
  - Create emails to multiple contacts in the List view.

- Print mailing labels, envelopes, etc., with the Print Wizard.

Chapter 1 Creating CardScan Address Book

You can transform piles of business cards into an address book simply by scanning the cards into a CardScan file. However, since the primary advantage of an electronic address book is the ability to reach your contacts quickly, your address book must be as accurate and complete as possible. This chapter illustrates how CardScan enables you to create an efficient and reliable address book.

- • Scanning business cards into a CardScan file
- • Viewing your CardScan file
- • Verifying accuracy
- • Reaching your contacts from CardScan

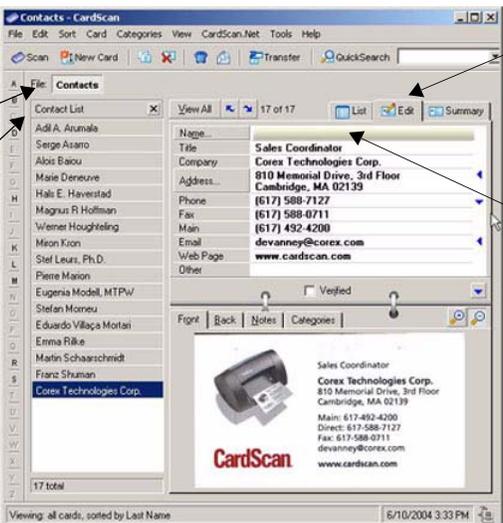## Scanning Business Cards into a CardScan File

To begin scanning business cards:

1. On the desktop, choose **Start→Programs→CardScan→CardScan**. The Scanner Setup Wizard appears.
2. Follow the wizard to set up CardScan for your scanner.
3. When the Setup is finished, CardScan opens a dialog prompting you to create or open a file.
4. Choose the appropriate option and click **OK**. CardScan opens your file.
5. Scan a business card. This dialog appears:

6. Scan more cards continuously, and click **Process.** As illustrated below, your new contacts appear in the Contact List. The first contact is displayed in the Edit view, so you can verify the accuracy.

Edit view tab

Filename

Contact List displays names of the contacts in your file. If a contact includes no name, Contact List displays Company.

CardScan highlights fields it suspects of inaccuracy to bring them to your attention.

Viewing Contacts in Your File

Click the List View tab to view the contacts in your file.

The List View tab displays contact information in a multicolumn list. You can customize the List view to include columns representing any type of contact information.

AccuCard Status (*see* page 2-4)

View All button *displays all contacts in file*

Verification Status *indicates unverified contacts with the* ? *symbol.*

List View tab

Letter Bar *enables you to list only contacts that start with the same letter.*

Number of Contacts in File

Status Bar
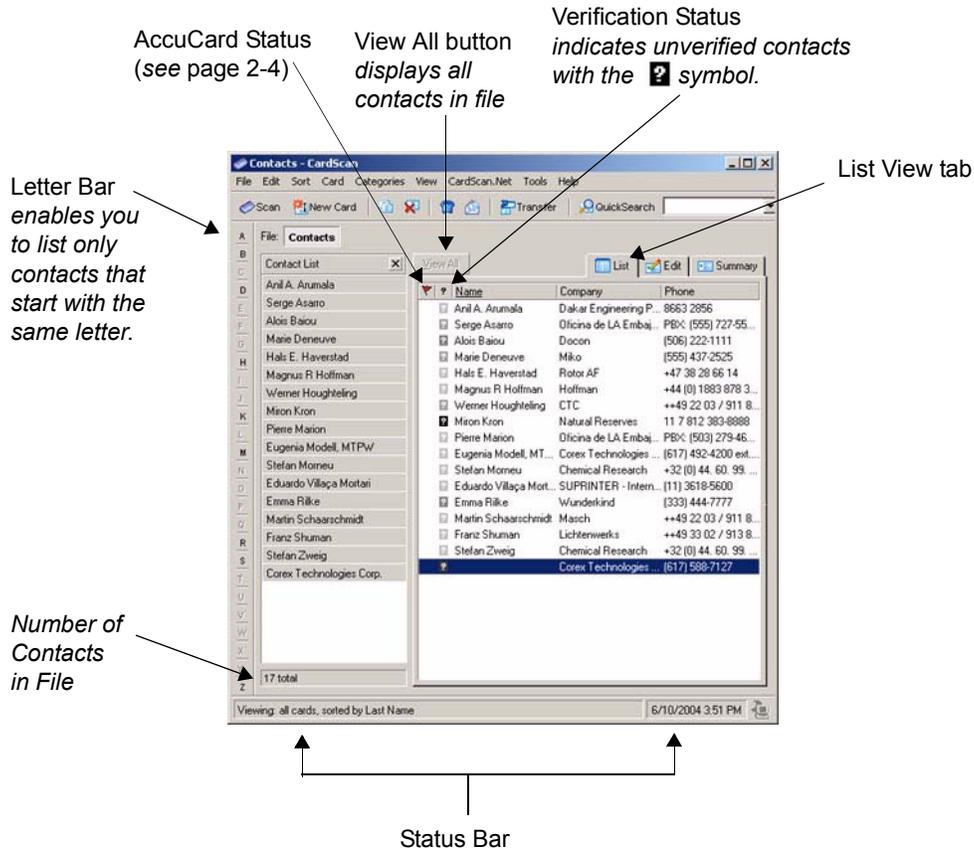
NOTE: Some ? *symbols look more "urgent" than other, because CardScan suspects serious inaccuracies. Conversely, the nearly faded symbols mark contacts that may be perfectly accurate. However, these symbols remain displayed until you have checked the "verified" box in the Edit view. See "Verifying Accuracy" on page 1-3.*

Verifying Accuracy

To verify a contact's accuracy, display the contact in the Edit view, as illustrated *on page 1-1*.

Verify Fields Highlighted by CardScan. CardScan highlights any field it suspects of containing incomplete or inaccurate information. To verify a highlighted field, compare its contents with the information in the card's image. *Note that when you click on a field, CardScan highlights the corresponding part of the image*.

Verify Fields and Text Hidden from View. Make sure you have reviewed fields and lines of text that may be hidden from view.

Name...	Eugenia Modell, MTPW
Title	Principal Technical Writer
Company	Corex Technologies Corporation
Address...	810 Memorial Drive, 3rd Floor Cambridge, MA 02139 USA
Phone	(617) 492-4200 ext. 7170
Fax	(617) 492-6650
Email	modell@corex.com
Web Page	www.cardscan.com
Other	

☐ Verified

The ◀ button indicates an additional field or additional lines of text. When clicked, the arrow changes to ▼ and the field opens.

When the fields containing information are not visible, CardScan displays this symbol. To view the hidden information, click directly above the symbol.

Check this box when satisfied.

Check Details of Names and Street Addresses. People's names often involve complex details. For example, some names contain titles or designations—such as Rev., Ph.D, and the like. Such details must be placed correctly, especially for export, transfer, or synchronization purposes.

As more people choose elaborate designs for their business cards, it is important to check street addresses, to make sure their components are in the correct fields. This is also very important when you scan business cards of people from other countries.

To begin checking details of Names and Addresses, click either the **Name** or the **Address** button in the Edit view. The following dialog appears:

Check Card Details

Name	Address	2nd Address

Prefix:
First: Richard
Middle: J.
Last: Palmer
Suffix:

OK
Cancel
Help
Next >
< Previous
10 of 14

If you click the **Name** button, the *Name* tab appears on top. If you click the **Address** button, the *Address* tab appears on top.

You can edit text in this dialog—as any text in the Edit view—by typing, dragging and dropping text, cutting and pasting text.

When you are satisfied with the contact's accuracy, check the "Verified" box.

Reaching Contacts from CardScan

CardScan's Summary view enables you to contact any person in your CardScan address book with a single click of the mouse.

Open the contact in the Summary view, by clicking the *Summary* tab, next to the *Edit* tab.

- To launch your browser to the website, point at the web address. When the cursor looks as illustrated below, click.

- To create a preaddressed email, click on the email address.

- To dial phone numbers in the same manner, you must have a modem installed on your computer.

- To display a street address on MapQuest, click on the address.

Chapter 2 Using CardScan as Your Contact Manager

As a contact manager, CardScan enables you to:

- Add contacts without business cards
- Add information to a contact
- Organize contacts with Categories
- Work with multiple contact files simultaneously
- Automatically find and remove duplicates
- Safeguard contact information
- Automatically keep contacts up to date

Adding Contacts without Business Cards

You can add contacts to CardScan by:

- Creating a new contact and typing information in the fields
- Dragging and dropping contacts from other applications and the Web
- Importing files

Creating Contacts by Typing. To create a contact by typing, follow these steps:

1. Click the **New Card** button. CardScan opens a blank contact in the Edit view.

2. Type contact information in the appropriate fields.

> *NOTE: CardScan has already checked the "Verified" box, assuming you enter the information accurately. If unsure, you can uncheck the "Verified" box.*

Dragging and dropping contacts from other applications and the Web. You can create contacts in a CardScan file by selecting text in another application, and dragging and dropping it onto the List view. This is useful for creating contacts from emails or electronic letters.

You can also drag and drop vCards from the Web.

Importing files into CardScan. You can import entire files from any contact manager or PIM that can export the file as a text file with the fields delimited by tabs or commas. To import a file, choose **File→Data Exchange→Wizard**. The Data Exchange Wizard will guide you through the process.

Adding Information to a Contact

The Edit view displays the information in separate fields for Name, Title, Company, Address, 2nd Address, Phone, Fax, Email, Web Page and Other. It also has fields for up to six additional phone numbers and six additional email addresses— that you can label individually.

Click on these buttons to open fields for additional information.

For example, if you click the button next to the Phone number, CardScan opens a blank field for a number and the drop-down list of labels. Type the number, and click on the drop-down list to choose from available labels or to create your own label.

NOTE: *You can add a 2nd Address with the method described above. However, to ensure accuracy, click the* **Address** *button, and use the* 2nd Address *tab of the* Check Card Details *dialog.*

Adding Notes. To add Notes to a contact, open the contact in the Edit view, and click the *Notes* tab.

Organizing Contacts with Categories

Categories allow you to organize contacts into meaningful groups. This helps you find contacts quickly, select contacts for printing mailing labels, etc. For more information, please consult the Online Help.

You can assign categories to:

- Individual contacts, by opening the contact in the Edit view, and clicking the *Categories* tab

- Multiple contacts, by selecting contacts in the List view, and choosing **Categories→Assign**

Working with Multiple Contact Files Simultaneously

CardScan allows you to open and work with multiple files simultaneously. This is useful, for example, if you want to

- Copy contacts from one file to another.
- Search for contacts in multiple files.

Copying contacts from one file to another. You can copy multiple contacts from one file to another by dragging and dropping. For example, to copy contacts from file "Contacts" to a new file "Contacts-2," follow these steps:

1. Choose **File→Open**, and open the file "Contacts." The filename "Contacts" appears on the File Bar.

2. Create the file "Contacts-2," by choosing **File→New.** CardScan opens a blank file, and the filename "Untitled" appears on the File Bar.

3. Choose **File→Save As**, and save file "Untitled" with the name "Contacts-2."
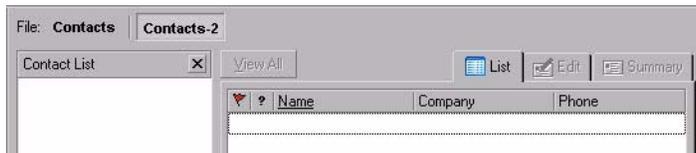
4. Click **Contacts** on the File bar to switch to file "Contacts," and select contacts you want to copy to "Contact-2."

5. Press and hold the mouse button until the cursor changes to the 🖰 icon. Drag the mouse over to the filename "Contacts-2" on the File Bar (as illustrated below), and release the mouse button.

NOTE: *The ability to drag and drop multiple contacts from one file to the other also allows you to split large files into two smaller ones. For more information, please consult the Online Help.*

Finding Contacts with QuickSearch. You can search for contacts in any number of open files. On the QuickAccess Toolbar, the QuickSearch component looks like this:

For refined searches, click this button, and use the QuickSearch dialog.

To repeat a word search you have done before, use this dropdown list of previously used word combinations.

To search with words included in the contact, type the words.

QuickSearch allows you to search by:

- simply typing words from the contact you are looking for
- specifying fields to be searched
- combining words and fields

To refine your search, click the **QuickSearch** button, and use this dialog:

Type words in this box.

Choose field from dropdown list.

Choose word combinations from the dropdown list.

If multiple files are open, choose files to search from dropdown list.

Finding and Removing Duplicates

CardScan's Duplicates Wizard finds duplicate contact information for you. It then helps you remove duplicates automatically or as you choose. To start the Duplicates Wizard, choose **Card→Find Duplicates**.

Safeguarding Your Contacts

To make sure your valuable information is safe and available when you need it, use the Backup Wizard. To start the Backup Wizard, choose **File→Maintenance→Backup**.

Saving files to CardScan.Net. The Backup Wizard allows you to save CardScan files to your personal, secure account on CardScan.Net (www.cardscan.net). In addition to a secure and web-accessible backup, you have the option to use the AccuCard Service (introduced next).

Keeping Contacts Up to Date with AccuCard Service

The AccuCard Service emails your contacts four times a year and asks them to review their contact information as it appears in your file. (The information in the Notes is never revealed to your contacts!) Contacts that have provided updates are marked in CardScan with the ¥ symbol.

To review available updates, choose **CardScan.Net→Review AccuCard Updates**. CardScan starts the AccuCard Updates Wizard, which helps you quickly to review and accept or reject any updates.

For more information, please consult the Online Help.

Chapter 3 Copying Contacts to and from Microsoft Outlook or other Contact Managers and PIMs

CardScan enables you to copy contacts to and from your favorite contact manager or personal information manager (PIM). CardScan provides several data-exchange options. To choose the optimal option for your contact manager, use the Data Exchange Wizard.

Choosing Best Option with Data Exchange Wizard

NOTE: The following example describes how the Data Exchange Wizard assists the users whose contact manager is Microsoft Outlook. If you use a different contact manager, simply provide the Wizard with your information, and it will guide you to the option that is right for you.

Example: Microsoft Outlook. To choose the option that suits you best, follow these steps:

1. To use the Data Exchange Wizard, start CardScan, choose **File→Data Exchange,** and choose **Wizard** from the Data Exchange menu. This screen appears:
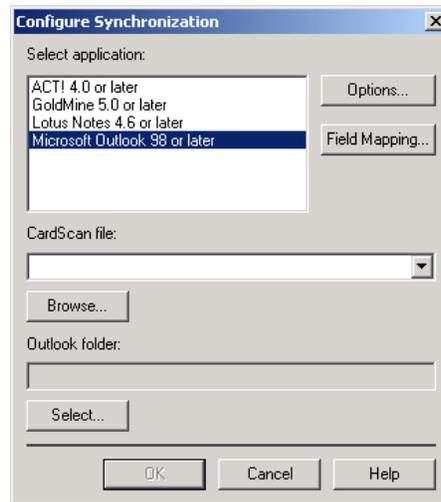

2. Make sure the first option is selected, and click **Next**.
3. On the screen that follows, select your version of Outlook, and click **Next**. The wizard suggests that you use CardScan Synchronization.
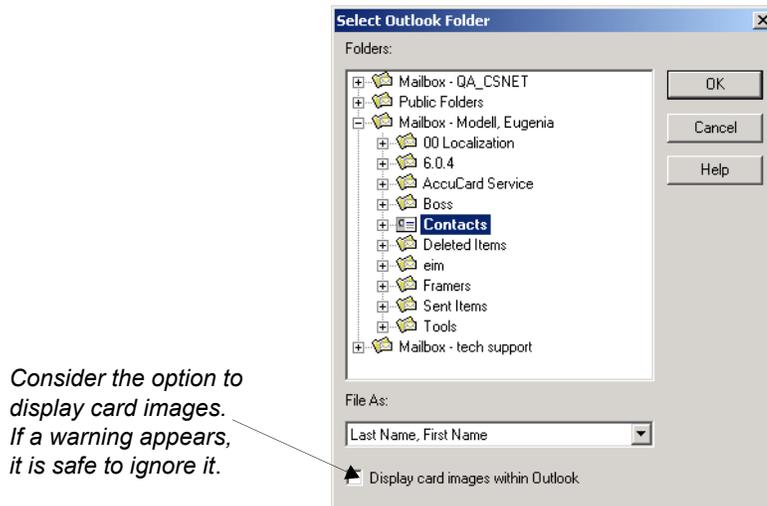
4. Click **Continue**. The *CardScan Synchronization* dialog appears:
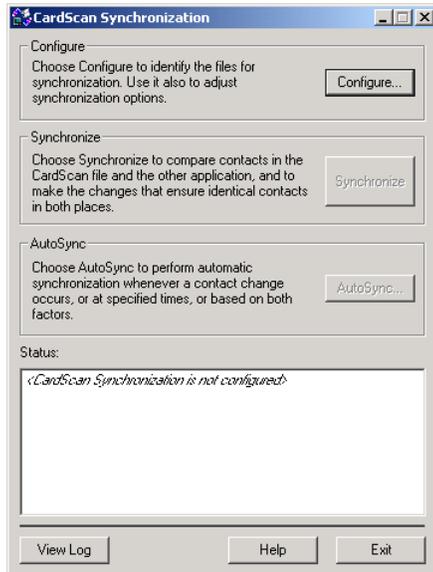
5. Click **Configure** The *Configure Synchronization* dialog appears:

6. Browse for the CardScan file to synchronize. Then, click **Select** to select an Outlook folder. This dialog appears:

Consider the option to display card images. If a warning appears, it is safe to ignore it.

7. Select the Contacts folder to synchronize with CardScan, and click **OK**. The *Configure Synchronization* dialog appears, displaying your choice of files to synchronize:
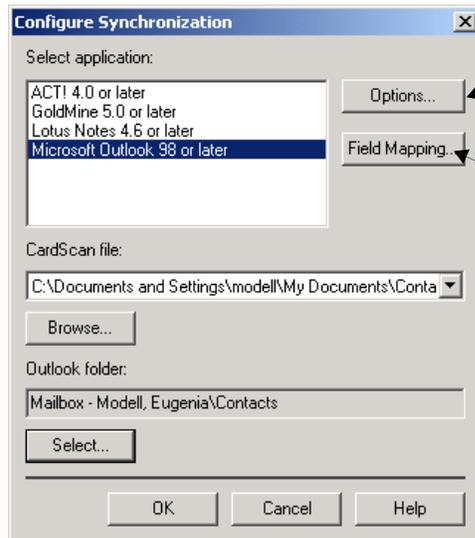
Click to review the CardScan Synchronization Options.

Click to view how fields are mapped between CardScan and Outlook contacts.

8. (Optional) Click **Options** to review the default synchronization options. The default options may be exactly what you need. However, it is useful to see what you can change if you so desire.

The default option ensures that both the CardScan file and the Outlook Contacts folder contain complete contact information.

Data conflicts may occur if the CardScan file and your Outlook folder contain different information for the same contact. For more information, please consult the Online Help.
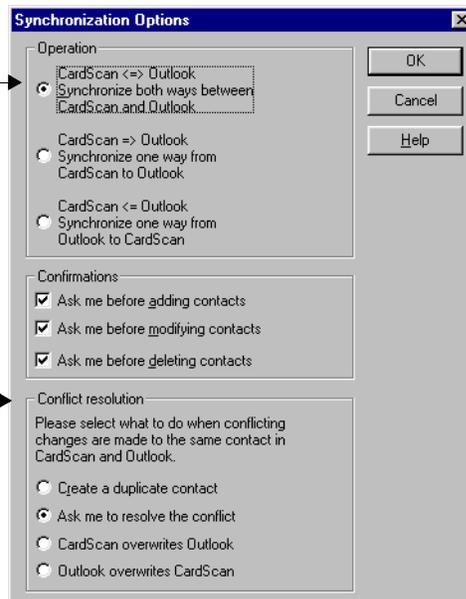
9. (Optional) Click **Field Mapping** to review or edit the default field mapping.

10. Click **OK** to save the configuration and to return to the *CardScan Synchronization* dialog:

CardScan Synchronization

Configure
Choose Configure to identify the files for synchronization. Use it also to adjust synchronization options.

[Configure...] — Click to change the current configuration.

Synchronize
Choose Synchronize to compare contacts in the CardScan file and the other application, and to make the changes that ensure identical contacts in both places.

[Synchronize] — Click to synchronize the files shown in the Status window.

AutoSync
Choose AutoSync to perform automatic synchronization whenever a contact change occurs, or at specified times, or based on both factors.

[AutoSync...] — Click to set up automatic synchronization.

Status:
CardScan Synchronization is configured to synchronize CardScan with Outlook

CardScan file: Contacts.cdb
Outlook folder: Contacts

[View Log]   [Help]   [Exit]

Synchronizing CardScan and Outlook. You can perform synchronization manually, at any time, or choose automatic synchronization.

•   To synchronize manually, click **Synchronize** on the *CardScan Synchronization* dialog.

•   To set up automatic synchronization, click **AutoSync** on the *CardScan Synchronization* dialog. You can also choose to set up automatic synchronization.

NOTE: If you have set up AutoSync, you can still synchronize manually at any time.

Chapter 4 Copying Contacts to and from Palm OS™ Handheld Devices

CardScan provides several options for copying contacts to and from your Palm OS handheld.

NOTE: *These options become available only when CardScan finds the Palm Desktop Version 3, or later, installed on your PC. You must install your Palm OS software before installing the CardScan software.*

Choosing Best Option with Data Exchange Wizard

To choose the most efficient option, use the Data Exchange Wizard. Follow these steps:

1. Start CardScan, choose **File→Data Exchange**, and choose **Wizard** from the Data Exchange menu.

2. On the first screen of the wizard, select the option for Palm handheld devices, and click **Next**. This screen appears:


NOTE: *The first option on this screen is preselected, because HotSyncing CardScan and your Palm Address Book is the best way to keep identical contacts in both places. After the initial synchronization, CardScan will help you find and remove duplicates, if any (see page 2-4). On subsequent synchronizations, CardScan synchronizes only new contact information. This prevents new duplicates from being generated.*
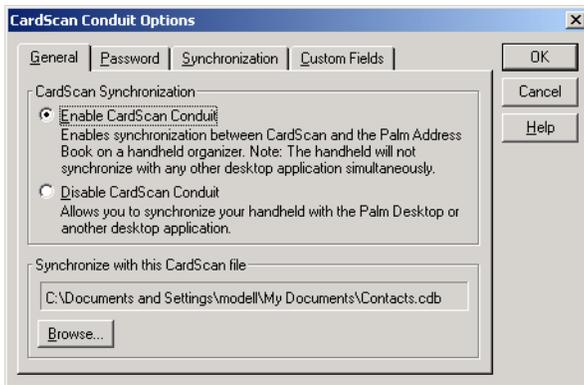
The following steps describe setting up this option.

3. Click **Next**. The screen introducing the CardScan Conduit for Palm appears.

4. Click **Continue**. This dialog appears:
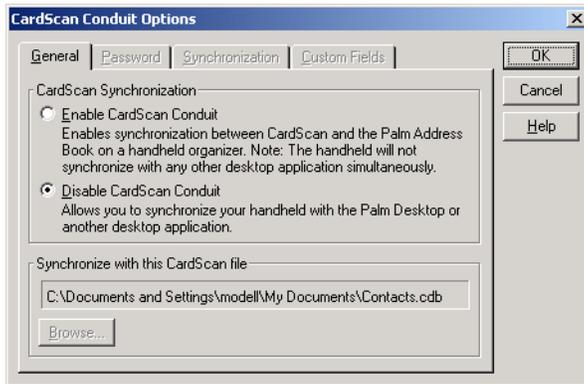
5. Select **Enable CardScan Conduit**. This enables all CardScan Conduit options,

6. Set the options as you like, and click **OK** to save the settings and close the *CardScan Conduit Options* dialog. If you need assistance setting the options, click the **Help** button on the dialog.

To synchronize: Press the **HotSync** button on the cradle to start synchronization. The progress dialog appears. When the synchronization completes successfully, the progress dialog closes.

Chapter 5 Copying Contacts to and from Pocket PC® Devices

CardScan provides several options for copying contacts to and from your Pocket PC.

NOTE: *To synchronize with CardScan, your Pocket PC® must be running Microsoft Windows CE 3.0 or later.*


Choosing Best Option with Data Exchange Wizard

To choose the most efficient option, use the Data Exchange Wizard. Follow these steps:

1. Start CardScan, choose **File→Data Exchange**, and choose **Wizard** from the Data Exchange menu. The first screen of the Data Exchange Wizard appears.

2. Select the option **Copy CardScan contacts to and from a Pocket PC device**, and click **Next**. This screen appears:


3. Select the option you prefer, and click **Next**.

    • If you choose the second option, the wizard will guide you through the process described in *"Chapter 3 Copying Contacts to and from Microsoft Outlook or other Contact Managers and PIMs."*

    • If you choose the ActiveSync option, the wizard guides you to the Microsoft ActiveSync Window:

Tools Menu
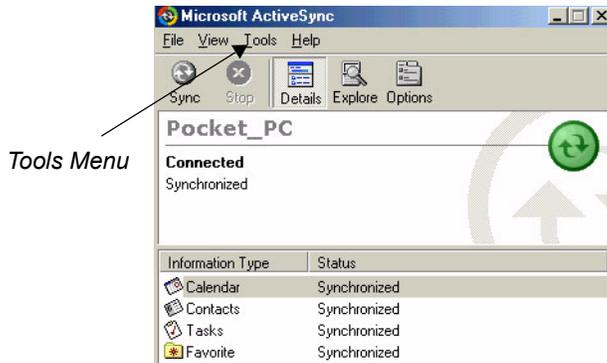
4. Choose **Tools→Options**. The *Options* dialog appears:
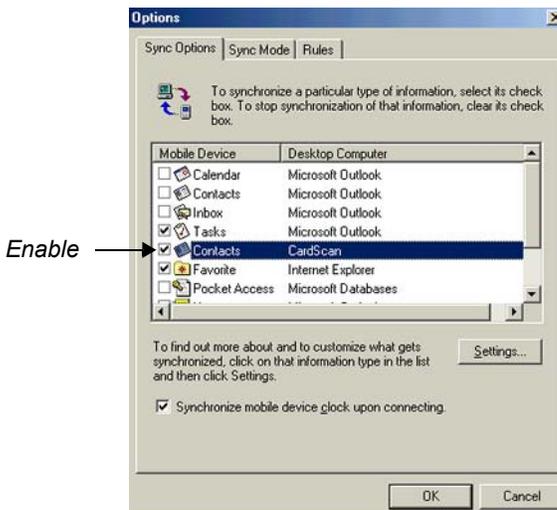
Enable

5. Enable CardScan service, and disable any other services that synchronize the contacts on the device. (You can synchronize contact information with only one service at a time.)

6. On the *Sync Mode* tab, select the time for the synchronization to occur. On the *Rules* tab, specify the conflict-resolution and file-conversion rules.

7. Click **Settings**. The *CardScan ActiveSync Options* dialog appears.

8. Browse for the CardScan file with which to synchronize. For a password-protected file, consider the password options. This will prevent password prompts at every new ActiveSync connection.

9. Click **OK** to close the *CardScan ActiveSync Options* dialog.

Synchronizing Selected Files. On the Microsoft ActiveSync window, click the **Sync** button to synchronize files. Then, click **OK** to complete the synchronization.

Appendix A: Compliance with FCC and EC

FCC Statement

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of FCC rules. These limits are designed to provide reasonable protection against harmful interference in a residential installation.

This equipment generates, uses and can radiate radio frequency energy and, if not installed in accordance with the instructions, may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in any installation.

To comply with part 15 of FCC rules, you must use the cable provided with the scanner. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to correct the interference by one of the following measures:

- Reposition the receiving antenna.
- Increase the distance between the equipment and the receiver.
- Connect the scanning and computer equipment to an outlet on a circuit different from the receiver's.

EC Declaration of Conformity

Equipment Description:	Model CardScan 700c Information Technology Equipment Card Scanner 5 vdc, 500mA
Year of Manufacture:	2004
Applicable Directives:	73/23/EEC, Low Voltage Directive 89/336/EEC, EMC Directive
Applicable Standards:	EN 60950-1:2002 Information Technology Equipment - Safety EN 55022: 1998 Information Technology Equipment - Radio Disturbance Characteristics - Limits and Methods of Measurement EN 55024: 1998 Information Technology Equipment - Immunity Characteristics - Limits and Methods of Measurement

Peter Dikeman
Vice President Engineering
Corex Technologies Corporation
April 1, 2004

Appendix B: CardScan Technical Support

If you have trouble using CardScan, try Knowledge Base on www.corex.com. If you still need assistance, the Tech Support Information is next.

English/North America

Tel: 617-492-4200
Fax: 617-492-6659
http://www.corex.com

Europe

French

Tel: +49 (0) 2203 9113333
Fax: +49 (0) 2203 9113390
http://support.cardscan.org

German

Tel: +49 (0) 2203 9113331
Fax: +49 (0) 2203 9113390
http://support.cardscan.org

English/United Kingdom

Tel: +49 (0) 2203 9113332
Fax: +49 (0) 2203 9113390
http://support.cardscan.org

Other

Please contact your local reseller. To find your local reseller, visit www.corex.com.