# Getting Started with CardScan

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## Welcome to CardScan!

Summary of Products	1
Major Features	2
CardScan User Resources	4
Obtaining Technical Support	4

## Chapter 1 Creating CardScan Address Book

First Steps	1-1
Viewing Contacts in List View	1-3
Verifying Accuracy	1-4
Reaching Contacts from CardScan	1-5

## Chapter 2 Using CardScan as Your Contact Manager

Adding Contacts without Business Cards	2-1
Use Additional Fields for More Information	2-2
Organizing Contacts with Categories	2-2
Major Features for Finding Contacts	2-3
Finding and Removing Duplicates	2-4
Working with Multiple Contact Files	2-4
Safeguarding Your Contacts	2-5
Updating Contacts by Scanning	2-6

## Chapter 3 Using CardScan Data in Microsoft Outlook and other Desktop Applications

Choosing Best Option with Data Exchange Wizard	3-1
Synchronizing CardScan and Outlook	3-3

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

Choosing Best Option with Data Exchange Wizard	4-1
Synchronizing	4-2

# Chapter 5 Copying Contacts to and from Windows Mobile<sup>®</sup> Devices

Choosing Best Option with Data Exchange Wizard	5-1
Synchronizing Selected Files	5-2

## Appendix A: Compliance with FCC and EC

## Welcome to CardScan!

This book introduces major features of the CardScan family of products. The purpose of this book is to show you the strengths and flexibility of CardScan products, and direct you to the sources of any detailed information and instructions you may need as you learn the products hands-on.

## Summary of Products

Product	Users	Product Highlights
CardScan Executive	Individuals requiring the fast and accurate tool for transforming business cards into online address books. These users work with large volumes of contact information, prefer the ability to capture color, and work alone.	CardScan Executive is a core product that enables you to capture information from business cards into accurate, well-organized, and easily updatable online address books. CardScan Executive is an excellent contact manager. However, if you prefer to manage your data with another desktop application or a handheld device, CardScan's Data Exchange Wizard assists you in choosing and following the best method for copying data to and from CardScan. You can then use these data in Microsoft Outlook and other contact managers and Personal Information Managers (PIMs), as well as with Personal Data Assistants (PDAs), such as Palm handhelds and Windows Mobile Devices.
CardScan Team	Teams who share contact files on the company Intranet	Includes all the features of CardScan Executive, plus the capabilities enabling teams to share files on a network.
CardScan Lead Qualifier	Teams capturing contacts at various events, sharing an acting upon the data promptly.	Captures contact and lead-qualifying data by scanning forms. Once the data has been captured, all the features of CardScan Executive and Team are available for the teams to verify and use the data efficiently.
CardScan Personal	CardScan users requiring a portable scanner.	A portable version of CardScan Executive, with all the functions, except scanning cards in color. Exchanges data with a limited number of PIMs an PDAs.

## **Major Features**

The following section presents the major features common to all CardScan products:

- Scanning
- Accuracy Verification
- Intuitive Graphical User Interface
- Contact Management with Enhanced Navigation
- Data-Exchange
- · Enhanced Ability to Reach Contacts Online

#### **Scanning Features**

- Scan and process international business cards.
- During scanning, automatically categorize batches of cards and add notes to each card in the batch.
- For cards with information on both sides, capture and include an image of the back of the card.
- The ability to start CardScan simply by inserting a business card into the scanner. The scanner's automatic detection of the cards is always enabled. When the scanner detects a card, it starts the CardScan program.

### **Accuracy Verification**

- The usability of an address book depends on how accurate the data is. CardScan makes it
  easy for you to verify the data by drawing your attention to the fields where the information
  may be inaccurate.
- CardScan's Check Details feature helps you verify that the details of names and addresses have been placed in the correct fields, and enables you to correct any errors easily.

#### **Intuitive Graphical User Interface**

- Simply move the cursor around the CardScan window, pointing at various parts of it. You will notice that almost any element in the window represents a function, and the description of the function appears in the balloon help.
- List View icons allowing you to display contacts in List View in the format that suits you best. These icons provide you with a variety of views, ranging from a collection of card images only to the level of details that allows you to interact with the data (for example, locate an address on the web map by clicking on the address in the List View.)

#### **Contact Management Features**

- Use the Navigation Bar for immediate access to groups of contacts based on the same criteria; for example, Categories, Recent Changes, Duplicates, etc.
- Use a powerful, sophisticated, and flexible QuickSearch feature to find contacts in multiple open files.
- With the Duplicates Wizard, automatically find and manage duplicate contact information.
- Display multiple files simultaneously in separate CardScan windows.
- Save a copy of a file to your private, secure account on the AtYourService website (at <u>www.cardscan.net</u>), and access your file anytime, from anywhere in the world, using a web browser.
- If you web-enable your local files by saving them to the AtYourService website, you can automatically receive updates for your contact data via AtYourService. Review and accept or reject updates from your browser.

## **Exchanging Data with Other Programs and Devices**

- Use the Data Exchange Wizard to automatically discover applications installed on your computer and choose the most suitable method to copy data to and from CardScan. The Wizard simplifies copying data to and from:
  - Other Desktop Applications (for example, Microsoft Outlook)
  - Palm OS<sup>™</sup> Handheld Devices
  - Windows Mobile<sup>®</sup> Devices

#### Improved Emailing, Dialing and Visiting Websites

- You can initiate emailing, dialing, or visiting websites by clicking on the data in the List and Summary views.
- You can email CardScan contacts from Microsoft Outlook, without copying these contacts to Outlook. To be able to do this, designate a CardScan file as an address book in Outlook. This will enable you to view and email your CardScan contacts from Outlook.
- You can locate a contact's address on a web map by clicking on the address in the List or Summary view. You can also choose which web-mapping service will generate maps for you.

## CardScan User Resources

Online Help	Use the online help for instructions, detailed descriptions of features, and for troubleshooting tips. For help with dialogs, click <b>Help</b> 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 <b>F1</b> key on your keyboard or from CardScan's <b>Help</b> menu.
CardScan Website	<ul> <li>Visit www.cardscan.com for:</li> <li>Software updates</li> <li>Documentation downloads</li> <li>Knowledge Base, maintained by Technical Support</li> </ul>

## **Obtaining Technical Support**

To obtain technical support for your language/location, use the following information:

#### **English/North America**

Tel: 617-492-4200 or 1-866-900-6902 Fax: 617-492-6659 http://www.cardscan.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: 0845-6000588—callers inside the UK Tel: +49 (0) 2203 9113332—English-speaking callers anywhere. Fax: +49 (0) 2203 9113390 http://support.cardscan.org

#### Others please contact your local reseller. Find your local reseller on www.cardscan.com

## Chapter 1 Creating CardScan Address Book

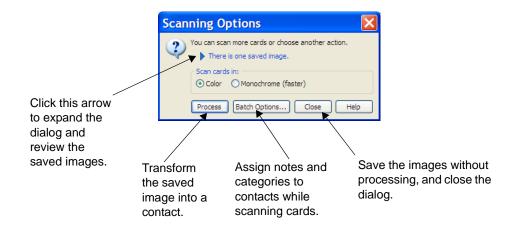
This chapter illustrates how CardScan creates an address book simply by scanning business cards into a file. It also highlights the features for verifying the information accuracy. It describes:

- · First steps scanning business cards
- Viewing your CardScan contacts
- Verifying accuracy
- Reaching contacts from CardScan

## **First Steps**

This section describes the steps for you to take *after you have installed and set up* CardScan. The installation and set up steps are described in the document inserted with the product CD-ROM. It assumes that you did not choose starting CardScan as the last step of the installation procedure; therefore you must start CardScan first. Follow these steps:

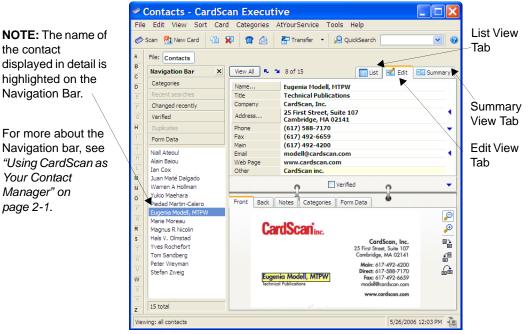
- 1. Start CardScan by choosing **Start**→**Programs**→**CardScan**→**CardScan**. CardScan starts by opening the Welcome Wizard.
- 2. Follow the Welcome Wizard to set up CardScan to work with your scanner and to enable the features that will enhance your experience using CardScan. When the setup is finished, CardScan opens a dialog prompting you to create a file or open an existing file.
- 3. Choose the option you want and click **OK**. CardScan opens the file for new contacts.
- 4. Scan a business card. This dialog appears:



- 5. Scan several more cards by inserting them in the scanner, and then use any of the following options:
  - Click on the blue arrow to expand the dialog and review the saved images before processing.



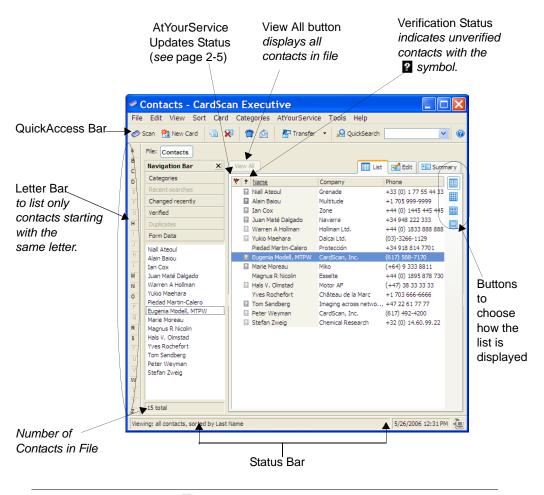
• Click **Process** to create contacts from the saved images. CardScan processes the images and displays the details of the last one in Edit view, to help you review the accuracy.



## **Viewing Contacts in List View**

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.



**NOTE:** The intensity of the symbol varies, depending on the probability of the contact's being inaccurate. However, even accurate contacts are accompanied by question marks until you have checked the "verified" box in the Edit view. See "Verifying Accuracy" on page 1-4.

## **Verifying Accuracy**

To verify a contact's accuracy, display the contact in the Edit view, as illustrated on page 1-2.

**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.

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Name	Eugenia Modell, MTPW	
Title	Technical Publications	
Company	CardScan, Inc.	
Address	25 First Street, Suite 107 Cambridge, MA 02141	٩
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Email	eugenia.modell@cardscan.com	•
Web Page	www.cardscan.com	
Other	CardScan inc.	
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The  $\triangleleft$  button indicates an additional field or additional lines of text. When clicked, the arrow changes to  $\checkmark$  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 with the accuracy.

*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	×
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<u>F</u> irst	Richard	<u>H</u> elp
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<u>L</u> ast	Palmer	<u>≺</u> Previous
<u>S</u> uffix:		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**

If the contact information is accurate, you can interact with it in Summary and List view. When moving the cursor around in Summary view, notice that the cursor changes to the "pointing hand." By pointing and clicking with the mouse you can

- Launch your browser to the website.
- Create a pre-addressed email.
- Dial phone numbers, if your computer has a modem installed.
- Display a web map of the contact's address.

The following examples illustrate the Summary and List views where you can do any of the above with only a click of the mouse.

#### **Reaching a Contact from Summary View**

This is an example of visiting your contact's website from CardScan's Summary view.

1. Select a contact and click the Summary tab. The Summary view of the contact appears.



2. Point at the web address. Click when the cursor's shape changes to a "pointing hand."

#### **Reaching a Contact from List View**

You can choose how List View displays the contacts in the file by clicking the buttons on the right side. Click these buttons to see the different ways to view your contacts. The top button represents the least detailed view, and does not include the card images. The rest of the buttons display the list with the option to include the card images.

**NOTE:** In order to reach your contacts from List View, make sure the option **Show Card Images** is not selected.

The following illustration depicts dialing a phone number in a contact displayed in List View.



#### **Displaying Address Maps on the Internet**

You can use the same method to generate a map of your contact's address on the web. Another way to start this feature is to choose **Card**→**Display Map of Address**. Follow these steps:

- 1. Display the contact in Summary View or select in List View. Then either point at the address in the window or choose Card→Display Map of Address. The dialog Select Map Web Service appears.
- 2. Choose the service you want and click **OK**. CardScan launches your browser and displays the map using the service you selected. (If the browser is already open, CardScan displays the map within the existing browser window.)

## Chapter 2 Using CardScan as Your Contact Manager

CardScan includes several powerful features for contact management. These include:

- Different ways to add contacts without scanning
- Add fields to enter more data
- Organize contacts with Categories
- With the Navigation bar, view contacts grouped by categories, recent changes, verification status, etc.
- Find contacts with QuickSearch
- Find and remove duplicates
- Replace the card image and data by scanning a new card
- · Safeguard and access contacts with AtYourService
- Receive automatic updates via AtYourService
- Work with multiple files in multiple windows

## 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 on the QuickAccess toolbar. 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 data in 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.

## Use Additional Fields for More Information

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—which you can label individually.

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Title Company			button next to the Phone number, CardScan opens a blank field for a number and the
Title Company Address	Technical Publications CardScan, Inc. 25 First Street, Suite 107		button next to the Phone number, CardScan opens a blank field for a number and the drop-down list of labels. Type th
Title Company Address Phone	Technical Publications CardScan, Inc. 25 First Street, Suite 107 Cambridge, MA 02141	}	button next to the Phone number, CardScan opens a blank field for a number and the
Title Company Address Phone	Technical Publications CardScan, Inc. 25 First Street, Suite 107 Cambridge, IMA 02141 (617) 588-7170	2	button next to the Phone number, CardScan opens a blank field for a number and the drop-down list of labels. Type th
Title Company Address Phone Fax Main ±	Technical Publications CardScan, Inc. 25 First Street, Suite 107 Cambridge, IMA 02141 (617) 588-7170		button next to the Phone number, CardScan opens a blank field for a number and the drop-down list of labels. Type th number, and click on the drop-
Title Company Address Phone Fax Main ± Email	Technical Publications CardScan, Inc. 25 First Street, Suite 107 Cambridge, HA 02141 (617) 588-7170 (617) 492-6659		button next to the Phone number, CardScan opens a blank field for a number and the drop-down list of labels. Type th number, and click on the drop- down list to choose from

**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

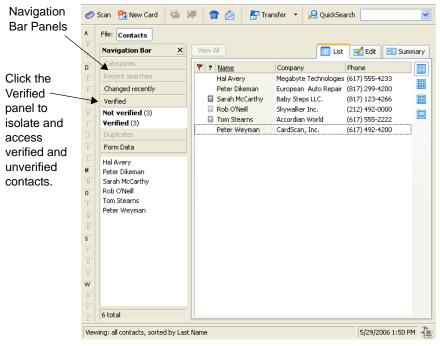
## Major Features for Finding Contacts

The two most powerful features for finding contacts are the Navigation Bar and QuickSearch

#### **Navigation Bar**

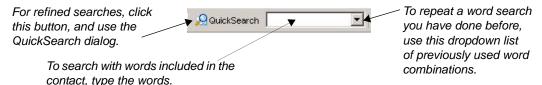
CardScan's Navigation Bar provides immediate access to different collections of contact information. The top part of the navigation bar contains panels that provide immediate access to different collections of contacts. To find all the contacts in a specific collection, click on the Panel, representing this collection, and then use the items inside each panel to find contacts.

An example below illustrates how—by clicking the **Verified** panel on the Navigation Bar—you can isolate the verified and unverified contacts.



## 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:



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:



## 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**.

## Working with Multiple Contact Files

CardScan allows you to run the program in multiple windows. This is convenient for working with multiple files. You can open CardScan in another window at any time, by choosing **File** $\rightarrow$ **Open Another Window**. When it first opens, the other window shows exactly the same information as the preceding window, Then, you can open another file in it (for example, to drag and drop contacts from one file to another, or you may want to display different views of the contacts in the same file simultaneously.

#### Dragging and dropping contacts from one file to another

The following example explains the difference between dragging and dropping contacts from file to file inside the same window and performing this task with the files displayed in separate windows:

- When you drag and drop contacts from one file to another in the same window, you drop the selected contacts onto the name of the file on the File Bar.
- When you drag and drop contacts from one window to another, you can drop the contacts anywhere onto the detailed area of the window. If the detailed area had displayed a contact in the Summary or Edit view, it will change to the List view when you drop new contacts there. The list view will display t in Summary or Edit view. List view displaying the contacts added to the list still highlighted.
- **TIP:** The ability to drag and drop multiple contacts from one file to another allows you to split large files into two smaller ones. For more information, please consult the Online Help.

## 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** $\rightarrow$ **Maintenance** $\rightarrow$ **Backup**.

The Backup Wizard allows you to save CardScan files locally, to a separate medium, and—most significantly—to your personal, secure account on the AtYourService website (www.cardscan.net).

### What is AtYourService?

AtYourService enables you to do any of the following:

- Web-enable any CardScan file on your PC by saving it to your private, secure account on AtYourService website. Afterwards, you will be able to access the web file with a browser, make changes to either the web or local file, and keep them identical with CardScan Synchronization.
- · Web-enabling files allows you to do the following:
  - When you're away from your own PC, you can access your contacts from any other Internet connection. Just launch the browser to AtYourService (www.cardscan.net) and sign in with your email address and password. You can view, add, edit or delete contacts.
  - When you return to your own PC, CardScan has updated your file with the changes you made on AtYourService.
  - If you have a PC at home and at work, install CardScan on both of them. Keep a local copy of your contacts in both places. AtYourService keeps the files synchronized.

With AtYourService, you can take advantage of contact-information updates provided by the contacts themselves. You can view, accept, or reject any contact updates with a few clicks of the mouse and no typing at all. CardScan will synchronize the web and desktop copies, to keep them identical.

#### Maintaining Contacts Usability with AtYourService Updates

Your electronic contacts are usable only when they are up to date. AtYourService solves the problem of keeping your contacts up to date. It 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 revealed.

To review available updates, choose **AtYourService** $\rightarrow$ **Review Updates**. CardScan starts the Updates Wizard, which helps you quickly to review and accept or reject any updates. For more information, visit www.cardscan.net.

## **Updating Contacts by Scanning**

If you have a contact's new card, you can update the contact's front image and the information in the corresponding fields by scanning the new card into the existing contact. To do so, select the contact and choose **Card** $\rightarrow$ **Replace**.

## Chapter 3 Using CardScan Data in Microsoft Outlook and other Desktop Applications

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.

CardScan Synchronization	_ 🗆 🗵
Configure Choose Configure to identify the files for synchronization. Use it also to adjust synchronization options.	Configure
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
- AutoSync	
Choose AutoSync to perform automatic synchronization whenever a contact change occurs, or at specified times, or based on both factors.	AutoSync
Status:	
ClardScan Synchronization is not configured)	
View Log Help	Exit

- 5. Click **Configure.** The *Configure Synchronization* dialog appears.
- 6. Browse for the CardScan file to synchronize. Then, click **Select** to select an Outlook folder. The dialog *Select Outlook Folder* appears:
- 7. Select the Contacts folder to synchronize with CardScan, and click **OK**. The *Configure Synchronization* dialog appears.
- 8. Review this dialog to be sure the selected CardScan file and Outlook folder are the ones you want to synchronize.
- 9. (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.

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.
tatus: CardScan Synchronization is configured to synchror Dutlook CardScan file: Contacts.cdb Outlook folder: Contacts	iize CardScan with	
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.
- TIP: You can use CardScan contacts from within Microsoft Outlook without copying these contacts to Outlook. CardScan has a feature that allows you to designate any CardScan file as a personal address book in Microsoft Outlook. You can Configure as many CardScan Address Books for Outlook as you like. To do so, choose Tools→Address Books for Outlook.

Chapter 3 Using CardScan Data in Microsoft Outlook and other Desktop Applications

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## 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 the CardScan installer finds the Palm Desktop software on your PC. You must install your Palm Desktop 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. The Data Exchange menu appears.
- 2. Choose Wizard from the Data Exchange menu. The Data Exchange Wizard starts.
- 3. On the first screen of the Data Exchange Wizard, select the option for Palm handheld devices, and click **Next**. This screen appears:

Data Exchange Wizard		×
	Copy contacts to and from a Palm handheld	
	You can copy contacts to a Palm handheld several ways. Please choose one of these options:	-
CE (	<ul> <li>HotSync my CardScan file with the Palm directly</li> </ul>	
	Choose this option if you use CardScan to keep and manage your contacts.	
	C Copy CardScan contacts to the Palm Desktop	
	Choose this option if you use the Palm Desktop as your contact manager, and HotSync it with the Palm handheld.	
	C Copy CardScan contacts to the application that I HotSync with the Palm handheld	
	Choose this option to add CardScan contacts to the application you use as your contact manager (for example, Microsoft Outlook).	
	< Back Next > Cance	el

**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.

- 4. Click Next. The screen introducing the CardScan Conduit for Palm appears.
- 5. Click Continue. The CardScan Conduit Options dialog appears.
- 6. On the General tab, select **Enable CardScan Conduit**. This enables all CardScan Conduit options,
- 7. 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.

## Synchronizing

Press the **HotSync** button on the cradle (or on the device) to start synchronization. The progress dialog appears. When the synchronization completes successfully, the progress dialog closes.

# Chapter 5 Copying Contacts to and from Windows Mobile<sup>®</sup> Devices

The CardScan ActiveSync module enables you to synchronize a CardScan file with Windows Mobile devices. These include Windows CE, Pocket PC, and SmartPhone 2003 or later. Synchronization via the CardScan ActiveSync module automatically updates data in a Windows Mobile device whenever you change contact information in the CardScan file, and vice versa.

**NOTE:** To synchronize with CardScan, your Windows Mobile device 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 Windows Mobile device, and click Next. This screen appears:

Data Exchange Wizard			
Data Exchange	Copy contacts to and from a Windows Mobile device  You can maintain identical contacts in CardScan and your Windows Mobile device by synchronizing CardScan with your Windows Mobile device directly or via another contact manager.  Synchronize my CardScan file with my Windows Mobile device using ActiveSync. Choose this option if you use CardScan to keep and manage your contacts.  Copy CardScan contacts to the application that I synchronize with the Windows Mobile device. Choose this option to ad CardScan contacts to a contact manager you synchronize with your Windows Mobile device.		
	< Back Next > Cancel		

**NOTE:** If you choose the second option, the wizard will guide you through the process described in "Choosing Best Option with Data Exchange Wizard" on page 3-1.

3. Choose the ActiveSync option, and click Next.

- 4. Click **Continue**. The Microsoft ActiveSync window appears.
- 5. Choose **Tools** → **Options**. The *Options* tab appears.
- 6. Enable the Contacts CardScan service by selecting the corresponding checkbox. Disable all other Contacts services.

**NOTE:** This is necessary because you can synchronize with only one contact manager at a time.

- If this is an initial setup, click OK. The CardScan ActiveSync Options dialog appears. If you are modifying the current setup, click Settings. The CardScan ActiveSync Options dialog appears.
- 8. Click **Browse** and select the CardScan file for synchronization.
- 9. (Optional) If your CardScan file is password-protected, select the option "Use this password," and type your password. This will allow CardScan to open the file automatically at every new connection, instead of prompting you for the password.
- 10. Click **OK** to close the *CardScan ActiveSync Options* dialog. Synchronization takes place automatically.

If synchronization does not take place automatically, click the Sync button.

#### Synchronizing Manually

You can always synchronize the selected files by clicking the **Sync** button on the Microsoft ActiveSync window.

## 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 800c Information Technology Equipment Card Scanner 5 vdc, 500mA
Year of Manufacture:	2006
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

EN 55024: 1998 Information Technology Equipment - Immunity Characteristics - Limits and Methods of Measurement

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Peter Dikeman Vice President Engineering CardScan, Inc. June 1, 2006

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