

# CardScan Version 7.0.5

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This document contains important information that is not included in any other CardScan documentation. It highlights changes in system requirements, new features, and known problems. Please read this document carefully!

## **Contents**

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## **Discontinued Support**

CardScan 7.0.5 or later does not support the following:

- Windows 98
- Windows ME
- Scanners which are not connected via USB

## **System Requirements**

CardScan 7.0.5 has the following system requirements:

- Windows 2000 or Windows XP, or later
- Pentium processor or later
- 64 MB of RAM
- 90 MB free hard disk space for a minimum installation and 120 MB for a full installation
- CD-ROM drive
- (Optional) Windows-compatible network for multiple users
- Modem for autodialing

## **Installation Notes**

- If Microsoft .NET Framework 1.1 has not been installed on your computer before, CardScan installs it automatically. This component can make the CardScan installation process significantly longer.
- If replacing an earlier version, CardScan prompts you to convert your existing files when you open them. A converted file cannot be opened with an earlier version of CardScan. Therefore, you are encouraged to **Save a backup copy of the original file**. Make sure this option on the dialog has been selected. The backup copy is saved in the same location as the original.
- Before installing **Lotus Notes 4.6 or 5.0** on **Windows 2000 or Windows XP** make sure to log on as Administrator.

## **New Features and Enhancements**

CardScan includes new features and enhancements in the following areas:

- Windows XP look and feel
- Read-only CardScan files
- Restricted User Accounts
- Finding Duplicates
- CardScan Synchronization
- Synchronization with Palm Handhelds
- Export
- Big Picture

### **Windows XP look and feel**

If you use Windows XP, CardScan's user interface adopts the look and feel of Windows XP. If you change a theme, CardScan updates the UI to match the theme.

### **Read-only CardScan files**

You can now designate CardScan files as read-only, preventing other users in a shared environment from editing the file.

### **Restricted User Accounts**

CardScan can function with Restricted User accounts. It accommodates Restricted Users who cannot create, edit, and delete files outside of their own "Documents and Settings" folder and its subfolders.

### **Finding Duplicates**

The search criteria has been refined. Therefore, we recommend that—after the upgrade—you run the Duplicates wizard to find previously undetected duplicates, if any.

### **CardScan Synchronization**

- CardScan Synchronization supports more desktop applications:
  - Palm Desktop
  - Outlook Express
  - ACT! 2005 Standard (included only with CardScan Executive)
- When a synchronization conflict occurs, you have the option to merge data manually.
- CardScan synchronizes contacts with Outlook's custom forms.
- You can toggle between the **Transfer** and **Synchronize** buttons on the **QuickAccess bar**.

### **Palm Handhelds**

- CardScan Conduit for Palm supports Tungsten T5.

### **Export**

- A new template allows you to export contact data into Microsoft Excel. The template generates comma-delimited .csv files—which Microsoft Excel can import.

### **Big Picture**

Similar to Edit and Summary views, the Big Picture displays images on the Front and Back tabs.

## ***Known Issues***

For updates on known issues, visit [www.cardscan.com](http://www.cardscan.com). The following are known issues with:

- ACT!
- CardScan.net Icon
- CardScan Signature Card
- GoldMine
- Lotus Notes

- Microsoft Outlook
- Palm Handhelds
- Pocket PCs

## **ACT!**

- When you synchronize CardScan with ACT!, it copies the "My Contact" record to CardScan. ACT! does not allow you to delete this contact. Therefore, if you delete this contact from CardScan, the next synchronization fails with an "Assert Failed" error and the contact is restored in CardScan.
- When an ACT! contact has multiple notes, only the first note is transferred to CardScan.
- The dash is missing in phone numbers synchronized from ACT! 6 to CardScan.

## **CardScan.net Icon**

If you delete a CardScan.net file from the Web, the CardScan.net icon remains displayed on the tab of the local file. To remove the icon, follow these steps:

1. Open the local file.
2. From the CardScan.net menu, choose **Synchronize**. The dialog prompting you to recreate the file on CardScan.net appears.
3. Click **No**.

## **CardScan Signature Card**

- If the image you have included using the Signature Card Wizard does not display in your outgoing email, check your Outlook options. In the Outlook options dialog, make sure to choose HTML as your message format and to disable the option "Use Microsoft Word to edit e-mail messages."
- If using Outlook 2003, you must close and reopen Outlook for CardScan Signature to take effect.

## **GoldMine**

After upgrading to CardScan 7.0.5—if GoldMine is not running—the CardScan Synchronization dialog does not display any information about the previous configuration with GoldMine. To restore this information in the dialog, you must close the dialog, start GoldMine, and open the CardScan Synchronization dialog again.

## **Lotus Notes**

If you edit and save a contact while simultaneously synchronizing with CardScan, Lotus Notes saves it as a conflict. This results in a disparity between the number of contacts in Lotus Notes and in CardScan.

## **Microsoft Outlook**

- If you have used the CardScan Synchronization without the option to "Display card images within Outlook," changing the configuration to use this option will not affect the contacts that had been synchronized before the change. This happens because, after the initial synchronization, only modified contacts are synchronized. Therefore, for the image of a previously synchronized contact to display in Outlook, you need to modify that contact and synchronize.
- The feature "Display the card images within Outlook" is unavailable for Outlook 98, because

Outlook 98 lacks MAPI properties required for embedded images.

- If the server's clock and your computer's clock are not synchronized, it takes Outlook longer to update your information on the server. As a result, CardScan Synchronization does not see the changes in Outlook immediately.

## **Palm Handhelds**

- When synchronizing with Palm handhelds, you may receive the message: "You cannot perform a HotSync operation while editing data. Please close the dialog and try again." **You can ignore this message.** It may be caused by trying to edit Palm Desktop data or start HotSync while simultaneously transferring cards from CardScan.
- CardScan.net allows you to keep multiple copies of the same CardScan file on multiple PCs. Therefore, if you synchronize your Palm device with the same file on more than one PC, HotSync will see these files as different, and will create duplicates.

## **Pocket PCs**

When using CardScan ActiveSync to synchronize with a Pocket PC device:

- Categories are not synchronized.
- CardScan's 2<sup>nd</sup> Address field is not synchronized.
- CardScan reads and writes "text" notes only and does not upload any drawings included in "ink" notes. If you edit the text Notes in CardScan, it will overwrite the ink note on the Pocket PC during the next synchronization. To prevent overwriting ink notes, edit them on the Pocket PC only.

**Note:** *Changing other fields in CardScan does not harm the ink notes in the Pocket PC.*

- Before synchronizing with CardScan remotely, you must synchronize locally, using a serial or USB cable, at least once.

**Note:** *You can synchronize remotely with a password-protected file only if you instruct CardScan ActiveSync to remember the password.*