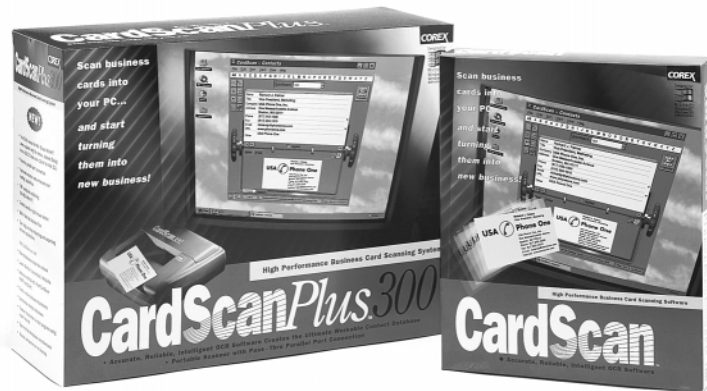


CardScan 3.0

Quick Start Guide

Top Ten Things You Can Do In CardScan

Windows™ 95
Windows™ NT
Windows™ 3.1



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CARDSCAN QUICK START GUIDE
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CARDSCAN INSTALLATION INSTRUCTIONS

Installing CardScan

If a version of CardScan is already installed, the setup program replaces the old version of CardScan. It will save your CardScan data files.

CardScan automatically prompts you to convert your old CardScan database to the new version when you open it. A converted file cannot be opened by an earlier version of CardScan. When CardScan prompts you to convert your file, make sure the checkbox labeled **Save a backup copy of the original file** is checked. This saves a backup copy of your database file in a directory named Backup under CardScan.

Installation instructions for Windows 95 or Windows NT 4.0

Note:

If you do not have a CD-ROM drive, refer to "Make diskettes" on page 6 to learn how to create diskettes.

Note:

For more information about using CardScan with the PalmPilot, refer to the on-line help or the *Quick Start Guide: Using CardScan With PalmPilot and WorkPad*.

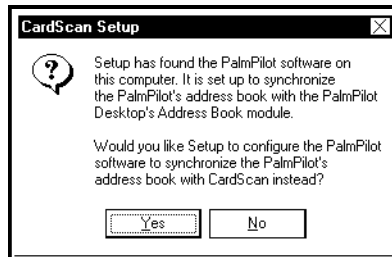
1. If you have a CardScan scanner, setup your scanner (refer to the Scanner Setup card for specific instructions).

Important! If you plan to use CardScan with PalmPilot or WorkPad, make sure that PalmPilot Desktop is installed prior to installing CardScan.

2. Insert the CardScan CD-ROM. If your CD drive has the Auto-Insert Notification option enabled, the installation program will launch itself automatically and you may skip steps 2-3.
3. Click **Start** on the taskbar and choose **Run**.
4. Type **d:setup** and click **OK**. (If your CD-ROM requires a different letter, use that letter instead of d.)
5. Follow the instructions on the setup screens.

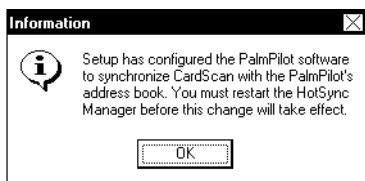
Important! If you have PalmPilot Desktop installed, follow these additional steps:

6. When CardScan installation displays this dialog, clicking **Yes** installs CardScan's PalmPilot Conduit and clicking **No** does not install the conduit:



**Installation instructions for
Windows 95 or Windows NT
4.0 (continued)**

7. If you clicked **Yes**, click **OK** when you see this dialog:



8. If you clicked **Yes**, when installation is complete, exit and restart PalmPilot's HotSync Manager.

Please register. The first time you start CardScan, it prompts you to register. As a registered user, you will receive free technical support and notification of future releases.

**Installation instructions for
Windows 3.1 or Windows NT
3.51**

1. Insert the CardScan CD-ROM.
2. From the Program Manager, choose **File**, then **Run**.
3. Type **d:setup** and click **OK**. (If your CD-ROM drive requires a different letter, use that letter instead of d.)
4. Follow the instructions on the setup screens.

Please register. The first time you start CardScan, it prompts you to register. As a registered user, you will receive free technical support and notification of future releases.

**Questions about
installation?**

Refer to the ReadMe, on-line help, or call CardScan Technical Support. The on-line help is a comprehensive guide to using CardScan.

Make diskettes

To make diskettes from the installation CD-ROM, follow these instructions:

1. Close all other applications, insert the CD-ROM, and select **Run** from the Start menu.
(Windows 3.1 and NT 3.51 users, select Run from the Program Manager's File menu).
2. Type or select the path and file **setup.exe**.
3. Type a space and +md.
For example, if the CD-ROM is in drive D, type d:setup +md.

Make Diskettes (continued)

4. Click **OK**.
5. You see a dialog, "Setup will copy the CardScan setup files onto 3 1/2 inch diskettes. Do you wish to continue?" Click **Yes**.
6. Follow the instructions on the screen.

ABOUT CARDSCAN'S QUICK START GUIDE

Welcome

Welcome to CardScan, the software that makes keeping up with your contacts simple and smart. CardScan is an electronic address book you can use with a scanner to read, store, share, and use information from business cards. Using CardScan, you can:

- exchange information with other contact managers and Personal Digital Assistants (PDAs)
- view, search, sort, and edit card information
- copy card information to word processing documents, fax cover pages, or other files
- dial phone numbers
- send e-mail and browse web sites
- print address books and mailing labels
- share your CardScan databases over a network
- mail merge with word processors

Using this Guide

This guide includes, and is organized around, the top ten things you are most likely to do in CardScan.

We suggest that you read the “*Top Ten Things You Can Do in CardScan*”, and then use the references contained in that section to locate instructions for a task.

You can also read this guide cover to cover or you can locate tasks you want to perform by looking in the Table of Contents.

If you read an unfamiliar term, we suggest that you search for it in the CardScan software’s on-line help. The on-line help provides definitions and additional information, which you can easily locate using the on-line help index or find function.



This symbol precedes keyword suggestions to help you use the on-line help search feature.

How do I get more information?

The CardScan Quick Reference Guide provides an overview of the major functions of CardScan along with helpful step-by-step instructions. Other sources of information include:

- CardScan on-line help. This easy-to-use help system provides the most complete and the most up-to-date information about using CardScan.
- Quick Start Guide: Using CardScan With PalmPilot and WorkPad. This guide teaches you in simple to follow step-by-step instructions how to use CardScan's PalmPilot Conduit to HotSync with the PalmPilot organizer and WorkPad.
- Overview card. This fold-out card provides a quick introduction to CardScan features and shortcuts.
- ReadMe file. This file is located in the CardScan program group. It contains up-to-date information about CardScan.
- Balloon help. When you rest the cursor over any CardScan button, check-box or other control, CardScan displays a brief message explaining what the control is used for.
- Scanner setup and operation card. If the CardScan software was included with your scanner, the package may include a Scanner Setup and Operation card. Refer to this card for information on setting up and using your specific scanner.

Tell Us About It!

If you have a question or comment about CardScan or this guide, please let us know. Your feedback helps us make a better product (software and documentation) for you.

If you are an established CardScan user, tell us what you think about the new features of CardScan. Or, if you are a new user, tell us what you think about the product. Let us know if this guide is helpful. We appreciate your comments.

Contacting us

Technical Support

For questions about CardScan, or solutions to problems with CardScan, users may contact us at:

E-mail: support@corex.com

Phone: (617) 492-4200

Fax: (617) 492-6659

Hours: Monday - Friday 10:00 a.m. - 6:00 p.m. ET

For the most efficient help, when you contact Technical Support, please be prepared to provide the following information:

User Information:

- Your name
- Your company name (if applicable)
- Your phone and fax numbers and e-mail address
- Your serial number

System Information:

- The version of CardScan you are using
- The operating system you are using
- The amount of RAM in your system
- The make and model of your hardware, including network hardware (if applicable)
- Types of any peripheral devices installed (e.g. printers, modems, CD-ROM drives, etc.)

Situation Information:

- The exact wording of any messages that appear on-screen
- A synopsis of what you were doing when the problem occurred
- A description of how you tried to solve the problem

Contacting us (continued)

Comments

To offer a comment or suggestion about this guide, contact us at documentation@corex.com.

Sales

To purchase additional CardScan products, in the U.S. contact us at:

E-mail: sales@corex.com

Phone: (800) 942-6739 (U.S. only)

Phone: (617) 492-4200 (outside U.S.)

Hours: Monday - Friday 8:45 a.m. - 5:30 p.m. ET

Web site:
www.cardscan.com

You can visit our web site at **www.cardscan.com** to learn more about us and CardScan. Our web site also hosts valuable tips about the software, easy solutions to fix common problems, and the most up-to-date information about CardScan.

TOP TEN THINGS YOU CAN DO IN CARDSCAN

CardScan has many exciting features you can use to make keeping up with your contacts simple and smart. This *Quick Start Guide* details the ten basic CardScan tasks you will probably use the most frequently.

Read “*Using CardScan*” on page 16 before you begin using CardScan’s great features!

Tip:

To find more information about these tasks, and any of the many other things you can use CardScan to do, search CardScan’s on-line help index for keywords.



Keywords:

scanning, processing

1. Scan and process, or enter business cards.

CardScan allows you to scan images of business cards. Then, CardScan’s intelligent OCR software processes (in other words, reads) the information from the business card image, then places the information in the correct fields. You can process a card and verify that the information was placed in the correct fields immediately after scanning, or you can wait until a more convenient time.

Refer to “*About scanning*” on page 20 and “*Scan a card*” on page 20 to learn about scanning, or search for the type of scanner you are using in CardScan’s on-line help.

Refer to “*Process a card*” on page 20 to learn how to process cards.

Refer to “*Enter a card*” on page 21 to learn how to add a new card entry manually.

2. Edit a card.

CardScan supports drag and drop editing, which lets you copy and move information without typing.

Refer to “*Drag and drop text on the same card*” on page 22 to learn how to edit a card.

Refer to “*Label a phone number*” on page 23 to learn how to label a phone number and refer to “*Label an e-mail address*” on page 23 to learn how to label an e-mail address.



Keywords:

editing, labeling

3. Create and password protect CardScan databases.

The first time you use CardScan, a new, blank, untitled database is automatically opened. Also, you can create a new CardScan database at any time. You need to save the database, and you may want to password protect it.



Keywords:

creating, password

Refer to “*Create a CardScan database*” on page 24 to learn how to create and save a new CardScan database.

Refer to “*Password protect a CardScan database*” on page 24 to learn how to password protect a CardScan database.

4. Search and find.

Once contact information is stored in CardScan, you can use the QuickSearch feature to find the information easily. You can quickly locate duplicate cards as well.



Keywords:

QuickSearch

Refer to “*Find a card using QuickSearch*” on page 25 to learn how to use QuickSearch.

Refer to “*Find duplicate cards*” on page 26 to learn how to find duplicates.

5. Share card information.

CardScan lets you share card information among CardScan databases, over a network, and between CardScan and another application



Keywords:

copying, network,
transferring, exporting,
importing

Refer to “*Share information among CardScan databases*” on page 27 to learn how to share card information among CardScan databases.

Refer to “*Share information over a network*” on page 28 to learn how to use CardScan on a network.

Refer to “*Transfer cards to another application*” on page 28 to learn how to transfer and export cards from CardScan to another application.

Refer to “*Import a file from another application*” on page 30 to learn how to import contact information into CardScan from another application.

6. Viewing card images and cards.

You can choose how to display your cards and how to sort your cards. CardScan is designed so you can make the software work as you need to use it.



Keywords:

big picture, view, viewing, sorting

Refer to “*View the card image*” on page 32 to learn about Big Picture.

Refer to “*Set card view preferences*” on page 33 to learn how to change the way cards are displayed.

Refer to “*Sort cards*” on page 34 to learn how to sort your cards.

7. Use CardScan to address letters and mail merge.

Do you often need to send out the same letter to many people? CardScan can be used in conjunction with your Word Processor to do just that. Or perhaps you need to send a letter to someone in your CardScan database – you can do this easily with CardScan.



Keywords:

address, mail merge

Refer to “*Address a letter*” on page 35 to learn how to address a letter to someone.

Refer to “*Mail merge with Microsoft Word or WordPerfect*” on page 35 to learn how to mail merge with Microsoft Word or WordPerfect.

8. Dial a phone number or send a fax.

You can use CardScan with your modem or fax software to quickly dial your contacts, whether they are local, long distance, or international. While viewing cards in CardScan’s Summary view, it’s as simple as clicking on the phone or fax number.



Keywords:


dialing, faxing

Refer to “*Dial a phone number*” on page 36 to learn how to dial a phone number.

Refer to “*Send a fax*” on page 38 to learn how to send a fax to someone in your CardScan list.

9. Use CardScan with the internet.

Many business cards now have an e-mail address and the address for the company's web site. It can be difficult to type in long, complicated e-mail or web address. Use CardScan with your e-mail package to address an e-mail or with your web browser to go directly to the web site.

 **Keywords:**
e-mail, web

Refer to “*Send an e-mail*” on page 39 to learn how to send an e-mail.

Refer to “*Go to a web site from CardScan*” on page 40 to learn how to go to a web site from CardScan.

#10. Print business card information.

CardScan provides many ways to print card information. You can set the print to match practically any pre-designed template, such as NEBS, Franklin Day-Planner, envelopes, labels, and more.


 **Keywords:**
printing

Refer to “*Print several cards*” on page 42 to learn how to print several cards.

Refer to “*Print a single card*” on page 43 to learn how to print a single card.

Refer to “*Select a print format*” on page 43 to learn how to use any of CardScan's pre-set layout formats.

Bonus: HotSync with PalmPilot Organizer and IBM WorkPad
CardScan's PalmPilot Conduit allows you to HotSync CardScan with both the PalmPilot Organizer and IBM WorkPad. Refer to “*Bonus: HotSync CardScan with PalmPilot Organizer and IBM WorkPad*” on page 44.

 **Keywords:**
PalmPilot, WorkPad

USING CARDS CAN

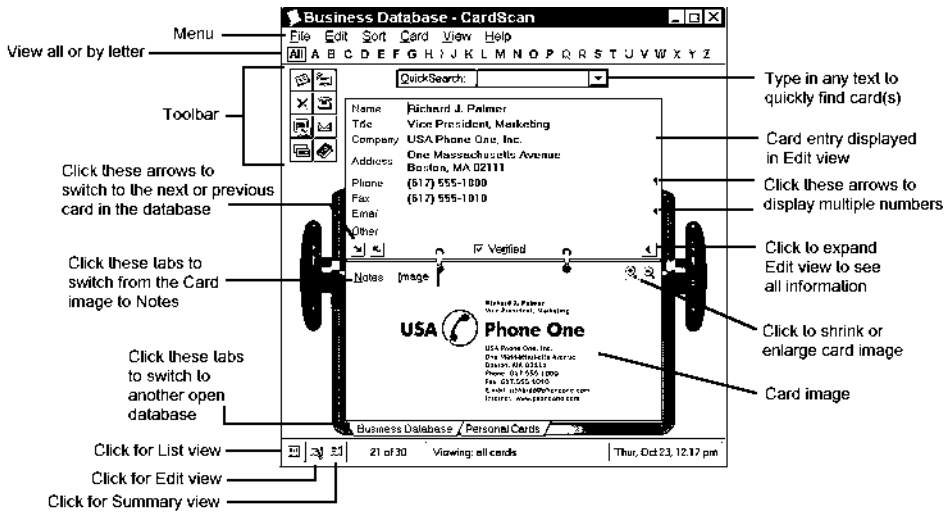


Figure 1. CardScan's Main Window

CardScan is an electronic address book you can use with a scanner to read, store, and use information from business cards. You can use CardScan to:

- exchange information with other applications such as PalmPilot and ACT!
- view, search, sort, and edit card information
- copy card information to word processing documents, send a fax, or other files
- use card information with your contact manager or Personal Information Manger (PIM)
- dial phone numbers
- address e-mail and browse web sites
- print address books and mailing labels
- share your CardScan databases over a network

Tip:

"Top Ten Things You Can Do in CardScan" on page 12, refers you to simple step-by-step procedures that teach you how to use CardScan.

View cards

Tip:

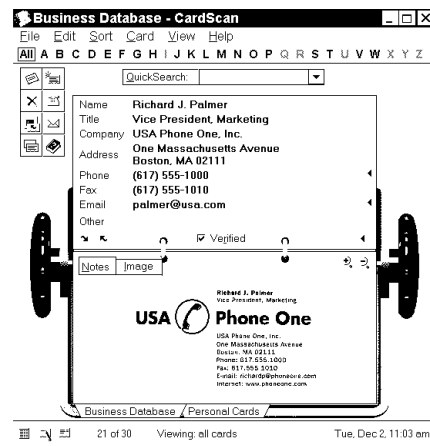
To switch to Edit view from List view, double click on the card you want to view, or to switch to Edit view from Summary view, click anywhere on the card.

There are three basic ways you can view a card in CardScan:

- Edit view
- Summary view
- List view

Edit view

Edit view allows you to enter changes for a card. To display Edit view for a card, click the Edit view button at the lower left corner of the screen or double-click on a card in the list.



Click for Edit view.

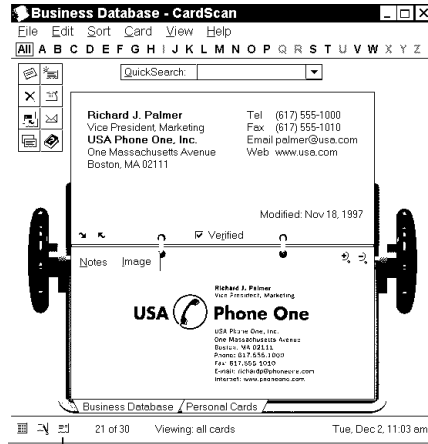
Figure 2. Edit view

Tip:

To switch to Summary view from Edit view, click with the right mouse button anywhere on the card.

Summary view

Summary view displays information from a single card in a format similar to how it would appear on a business card. This view also shows the date on which the card was created or last modified. To display Summary view for a card, click the Summary view button at the lower left corner of the screen.



Click for Summary view.

Figure 3. Summary view

Tip:

To sort the list, click on the heading (? , Name, or Company) you want to sort by. To see a single card in detail, double-click on that card.

List view

CardScan's List view summarizes all of your cards in a list format. For each card, List view displays the name, company, and phone number. To display List view, click the List view button at the lower left corner of the screen.

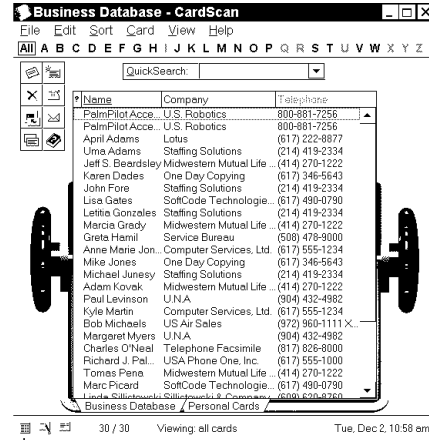


Figure 4. List View

#1: SCAN AND PROCESS, OR ENTER BUSINESS CARDS

About scanning

Scanning converts an image printed on a piece of paper into digital format. This digital format can be stored and displayed by your computer. CardScan uses Optical Character Recognition (OCR) to "read" text from the digital image of a business card. This text is then organized into the appropriate fields, such as name, address, etc.

Note:

To learn more about CardScan's scanners or about scanners CardScan works with, refer to the on-line help

CardScan is available with its own scanner. If you have a CardScan scanner, scanning is as easy as inserting a card.

CardScan is also available as a software only product that works with most TWAIN-compatible scanners. If you have a TWAIN-compatible scanner, you may need to understand how to set up your scanner to get the best results with CardScan.

Scanning with TWAIN-compatible scanners



Keywords:

name and brand of your scanner (e.g. Logitech Page Scan Color), scan

You can use TWAIN-compatible scanners with CardScan. To get the best results, you may have to specify certain settings on your scanner, such as grayscale and dpi. You should read your scanner's documentation to learn about how to specify settings.

The resolution of the image is defined in dots per inch (dpi). DPI is the number of pixels (horizontally and vertically) that comprise the scanned image. Many scanners allow you to scan images in black and white, grayscale, or color. CardScan can only process black and white and grayscale images. Make sure to check the on-line help to learn how to set up your scanner to get the best results with CardScan.

Scan a card



Keywords:

scan, scanning

For the best scanning instructions, refer to your CardScan scanner setup card. You can also find general instructions about scanning in the on-line help.

Process a card

After you finish scanning, CardScan asks you if you want to scan another card. If you click No or Process Now (depending on the scanner you are using) CardScan processes the cards you've scanned.

If you click Cancel or Close after scanning cards, CardScan does not process the scanned images. Instead, it saves the image of each card so that you may process the images at a more convenient time.

To process the saved images, select Process Cards from the Card menu.

Enter a card

You may not have a business card to scan. It is simple to create a new card record and enter the information manually. Follow these instructions:

1. Display the card in Edit view.
2. Click the **New Card** icon on the CardScan toolbar or select **New** from the Card menu.



3. CardScan creates a new, blank card and displays it in Edit view.
4. Click in each field you want to fill in and type the card information.
5. CardScan automatically saves the information you entered when you switch to List view or when you view another card.

#2: *EDIT A CARD*

CardScan supports drag and drop editing, which lets you copy and move information without typing. This helps you to add or update information easily. It also helps you to correct mistakes that occurred because a card had odd text or was too dark to scan well.

Drag and drop text on the same card

Tip:

You can click the copy button on the CardScan toolbar to copy the selected card or its image to the clipboard. Refer to the on-line help for information about copying a card image.



Keywords:

copy, drag and drop editing

Follow these instructions to learn how to drag and drop text on the same card:

1. In Edit view, use the mouse to highlight the text you want to move or copy.
To select all the text in the Name, Title, Company, Address or Other field, click the field name to the left.
2. To move the information, hold the mouse button down on the highlighted text until the cursor changes to the **Move** icon. Do not release the mouse button



OR

To copy the information, hold the **Control** key and mouse button down until the cursor changes to the **Copy** icon. Do not release the mouse button.



3. Drag the highlighted text to the new location, then release the mouse button. The text is now moved or copied.

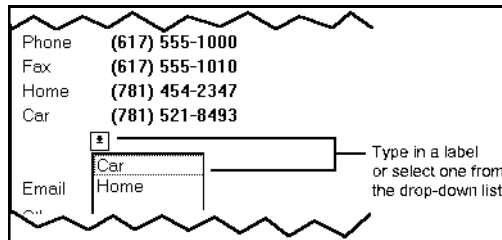
Label a phone number

CardScan can save up to eight phone numbers for a card. Follow these steps to create or select a label for a phone number:

1. Display the card in Edit view.
2. If the phone number is not visible, click the hidden text button to the right of the phone number field.



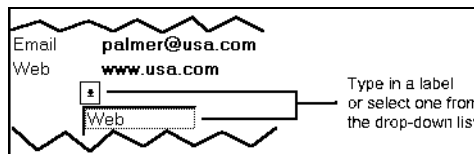
3. Click immediately to the left of the number and type a new label or select a label from the drop-down list (this list includes labels you created previously).



Label an e-mail address

CardScan can save up to seven e-mail addresses or web sites for a card. Follow these steps to create or select a label for an e-mail address or web site:

1. Display the card in Edit view.
2. If the e-mail address is not visible, click the hidden text indicator to the right of the e-mail field.
3. Click immediately to the left of the address and type a new label or select a label from the drop-down list (this list includes labels you created previously).



#3: *CREATE AND PASSWORD PROTECT CARDSCAN DATABASES*

- Create a CardScan database** You can keep all your cards in one CardScan database or you can create different CardScan databases for different sets of contacts. Follow these instructions to create a database:
1. Select **New** from the File menu.
 2. CardScan opens a new file called "Untitled".
 3. Select **Save As** from the File menu and give your new file a name.
 4. Scan cards for the new database or enter them manually.

If you exit CardScan without saving the file, a message asks if you want to save changes. Click Save and enter a name and location for the database.

- Password protect a CardScan database** Using the CardScan Password Protection feature, you can protect your CardScan database by assigning it a secret password. Be sure to remember the password, since you won't be able to open your database without it. Follow these instructions to password protect your database:
1. Select **Password** from the File menu.
 2. Enter a password, up to 20 characters in length.
 3. Confirm your password by entering it again.
 4. Click **OK**.

#4: SEARCH AND FIND

Tip:

Add Notes to cards to set them apart from other cards. For example, add the note “12/7 meeting” so you can easily find contacts who attended that meeting.

Find a card using QuickSearch

Note:

To view the search results in the other database, click on the tab for that file.

Tip:

If you have entered search text in the QuickSearch box for this same search before, you can select the search text from the QuickSearch drop-down list.

Tip:

If you do not want CardScan to automatically activate a different database, from the Edit menu, select **Preferences** and check the **Show search results in active database only** checkbox.

The easiest way to find a specific card is to use CardScan's QuickSearch feature. This allows you to find information on a card with only a few keystrokes.

CardScan searches all fields, including Notes, for the text that you type. If you have more than one database open, CardScan looks for your search text in all open databases.

You can use CardScan's other search feature, Find Duplicates, to find duplicate cards.

QuickSearch helps you find specific contacts. For example, if you need to find a list of contacts named “Palmer”, QuickSearch quickly finds all of these contacts. QuickSearch will search all open databases.

Follow these instructions to QuickSearch for card(s):

1. Click in the **QuickSearch** box or press the Esc key.
2. Type the text you want CardScan to search cards for. If you have one database open, CardScan searches that database. If you have multiple databases open, CardScan searches all of them.

3. If the text searched for is found, you will see one of the following:
 - Cards found with matching text are displayed in List view (the list of found cards narrows the list as you continue to type).
 - When multiple databases are open, a bold database name tab indicates that CardScan found card(s) matching the search text in those databases.
 - When multiple databases are open, if CardScan does not find a card that matches the search text in the active database, it activates the database in which it finds a matching card.If the text searched for is not found, then List view is displayed as a blank window.
4. Once you have found the card(s) you want, double-click on it to display it in detail.

Find duplicate cards

CardScan can find duplicate cards in your database. Follow these instructions to duplicate cards in your CardScan database:

1. Select **Find Duplicates** from the Card menu.
2. CardScan searches the database for cards with the same first and last name.
3. If it finds any duplicates, it displays all of them alphabetically by last name in List view.
4. Compare the information on the cards. If necessary, copy and paste information from one card to the other then delete the unnecessary card(s). **Make sure to leave one copy of the card.**

#5: *SHARE CARD INFORMATION*

CardScan lets you share card information:

- among CardScan databases
- over a network
- between CardScan and another application

Share information among CardScan databases

You can use CardScan's drag and drop feature to easily copy cards from one CardScan database to another.

To drag and drop one or more cards from one CardScan database to another, follow these steps:

1. Open both CardScan databases.
2. In List view, highlight the card(s) you want to copy to another CardScan database.
3. Hold the mouse button down over the highlighted cards until the cursor changes to the **Copy** icon. Do not release the mouse button.



4. Move the cursor until it is over the tab for the other CardScan database (at the bottom of List view), then release the mouse button.
5. CardScan copies the card(s) to the selected database.

Share information over a network

You can open CardScan databases over a network. This means multiple users can have the same database open at the same time, and can even edit it. Changes made to the database by any of its users are effective immediately, so a database may change before your eyes because another user has updated it.

To open a database over the network, follow these steps:

Tip:

CardScan remembers the last four databases you used and lists them at the bottom of the File menu. If the file you want is listed, select it from the File menu.

1. Select **Open** from the File menu.
2. Navigate to the network drive where the file is located, choose the CardScan database you want to use.
3. Click **OK** in Windows 3.1 and Windows NT 3.51.
OR
Click **Open** in Windows 95 and Windows NT 4.0.
4. CardScan opens the new file.

Transfer cards to another application



Keywords:

transfer, transferring

You can transfer or export cards from CardScan to many contact managers and PIMs. This lets you share contact information between applications without having to type in business cards one by one.

Transferring is the simplest way to send contacts from your CardScan database to a supported contact manager application with just a few clicks. The contact information is sent directly to the contact manager you select. However, not all contact managers support transferring.

To learn which contact managers CardScan will transfer to, select **Transfer** from the File menu and scroll through the **Transfer to:** list. (Click Close if you do not plan to transfer.)

Transfer cards

Follow these steps to learn how to transfer cards from CardScan to a contact manager:

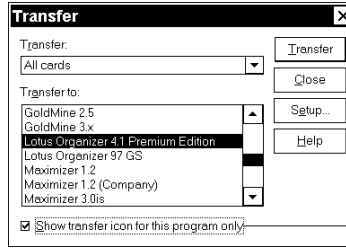
1. Start the contact manager application.
2. In List view, highlight the card(s) you want to transfer.
3. Select **Transfer** from the File menu.

Note:

If you are transferring to Maximizer 97is, refer to the on-line help for specific instructions.

Transfer cards (continued)

4. You see the Transfer dialog.



Check this if you want to only see the transfer icon for the selected contact manager. This is useful if you use more than one contact manager, but usually transfer to the same one.

Tip:

When a contact manager that CardScan can transfer to is open, CardScan displays the Transfer icon for it (this icon will look different for each application) in the upper-right corner of the CardScan window.

Click this Transfer icon to transfer the highlighted cards.



5. Choose whether you want to transfer all cards in the database, all cards in List view, or just those cards selected in List view.
6. Choose the application to which you want to transfer the card(s) and click **Transfer**.

Export cards to another application



Keywords:

export, exporting, importing

Note:

To learn how to import the CardScan export file into the other application, refer to the on-line help. Use the keyword “importing” mentioned above, and select the topic for your application.

Exporting is a process that allows you to copy information from the cards in your CardScan database to other applications such as word processors or spreadsheets. For example, you may want to write the same letter to several of your contacts using Microsoft Word.

When you export card information from CardScan, you create a text file called an export file. The fields (such as Name, Address, and Phone Number) in your text file can be separated by commas or by tabs. Once you export this file, you need to import it into another application.

When you export from CardScan, you must use an export template. This template determines which fields are copied to the export text file, and in what order they are copied. CardScan includes many export templates, such as for ACT! and Now Contact.

To learn which contact managers CardScan has export templates for, select Export from the File menu, click Next, and scroll through the Export to this application: list. (Click Cancel if you do not plan to export.)

Create an export file

You can use information from your CardScan cards in another program by exporting those cards to a text file and then importing that text file into the other application. CardScan includes templates for exporting to a variety of applications; in addition, you can create your own export templates.

1. Open the CardScan database you want to export. To only export some of the cards, select them in List view.
2. Select **Export** from the File menu. You see the Export wizard.
3. Follow the instructions on the screen to specify the following options:
 - Which cards you want to export
 - Which application you are using to import the cards
 - Whether to use the existing Export Template, or create your own template
 - The name and location for the exported text file
4. CardScan writes the card information to the file you specified.
5. Click **Cancel**.

Note:

If you need instructions for importing the card information using the application you specified, click the Help button at the end of the Export Wizard.

Import a file from another application

Importing is a means of copying information from another application, such as a database or contact manager, into a CardScan address file. For example, you may have a list of contacts in FileMaker Pro that you want to add to your CardScan file.

CardScan can import any list that can be saved in another application as a text file (with the fields delimited by tabs or commas). For example, if you have a list of names, addresses and phone numbers in a database, when you save it as a text file, you can then import it into your CardScan address list. Once you have imported a list, you can take advantage of CardScan features such as searching, dialing, and printing.

Import a file

To import a text file into CardScan, follow these steps:

1. Open the application from which you want to use information, and save or export the information as a text file delimited by tabs or commas.
2. Start CardScan and select **Import** from the File menu.
3. Choose the text file you saved earlier and click **Open**.
4. You see the Import dialog box. It has a column for each field and a row for each contact in the text file you selected. If the columns don't look right, try changing the Delimit By option to Tabs.
5. If you want to use one of CardScan's predefined import templates, select it from the **Saved Imports list**.
6. For each column of information you want to import, use the menu at the top of the column to indicate the CardScan field into which to put the information.
7. Initially, all contacts (rows) in the list are selected. If you don't want to import all the contacts, select just those you want to import. Use Shift-click or Ctrl-click to select multiple records.
8. Click Save Import As if you want to save the import template you have just created or modified.
9. Click Import to finish importing the text file into CardScan.

Note:

To omit a column, choose [ignore]. To import a column that doesn't have a corresponding CardScan field, choose Notes or Other.

#6: VIEWING CARD IMAGES AND CARDS

CardScan lets you customize the way you view card images and cards.

You may want to view a large image of the card to read handwritten notes. Or, you may need to verify a phone number. Big Picture lets you see a large image of the card, and Edit view lets you zoom in on parts of the card image to verify information.

You can also set your preferences for how the card is displayed. You can specify the default view when you view a card, as well as sort cards.

View the card image

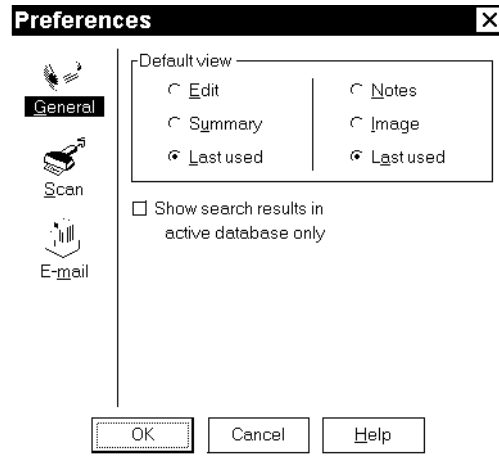
You can view a card image in several ways:

- Select **Big Picture** from the View menu. CardScan displays the image for the highlighted card in a separate, resizable window.
- When you view a single card in detail, CardScan displays either Notes or the card image at the bottom half of the screen. If Notes are displayed, click the Image tab to display the card image.
- When the Image tab is selected, click on any of the text fields in the edit view. CardScan will automatically zoom in on the correct part of the image.

Set card view preferences

Follow these steps to control how CardScan displays card information when a single card is first displayed:

1. Select **Preferences** from the Edit menu.
2. You see the Preferences dialog.



3. Select which views you want to see when you first look at a card:
 - **Default view (left column).** Indicates whether CardScan displays the Edit view, Summary view, or the view you last used at the top of the CardScan window when you first view a single card.
 - **Default view (right column).** Indicates whether CardScan displays the Notes view, Image view, or the or the view you last used at the bottom half of the CardScan window when you first view a card.

Sort cards

Note:

You cannot sort by telephone number.

Tip:

As a shortcut, when in List view, click on the heading to sort.

You can sort your cards by last name, company name, or by whether or not the card has been verified. You can sort the list from any card view by selecting the option for how you want to sort cards from the Sort menu.

Follow these steps to learn how to sort your cards:

1. From the Sort menu, select the category by which you want the cards to be sorted (e.g., by company, as shown in the figure below).



Name	<u>Company</u>	Telephone
Anne Marie Jon...	Computer Services, Ltd.	(617) 555-1234
Kyle Martin	Computer Services, Ltd.	(617) 555-1234

2. The heading by which you are sorting is underlined in the List view.

#7: *USE CARDSCAN TO ADDRESS LETTERS AND MAIL MERGE*

You can address a letter to someone in your CardScan database by using the Quick Copy feature to copy information such as name and address to the clipboard. Then, paste the information into a document. You can send the same letter to more than one person in your CardScan database by mail merging using your word processor.

Address a letter

Tip:

As a shortcut, click the **Quick Copy** icon on the CardScan toolbar:



Keywords:

copy setup, copy setup dialog

Follow these steps to address a letter:

1. Display the card you want to use in Summary view or highlight it in List view.
2. Select **Copy** from the Edit menu.
3. The fields specified in the Copy Setup dialog box will be copied to the clipboard. To specify the fields, select Copy Setup from the Edit menu.
4. Start your word processor and create a new, blank document.
5. Paste the contents of the clipboard into the document where you want to insert the name and address.

Mail merge with Microsoft Word or WordPerfect



Keywords:

mail merge

Mail merging is a way of creating individually addressed copies of a document without having to retype the contents of the document. You only need to write the letter once; your word processor will make a separate copy tailored to each person in your list of addresses from CardScan. You can also create envelopes or labels by mail merging.

Using CardScan you can mail merge with Microsoft Word or WordPerfect. The instructions vary slightly for the different versions. Refer to the CardScan on-line help or your word processor's on-line help for step-by-step instructions for mail merging.

#8: DIAL A PHONE NUMBER OR SEND A FAX

If you have a modem connected to your computer, you can dial a phone number using the numbers in CardScan, or you can use CardScan as an address book to send faxes.

Dial a phone number

These instructions are specific to the version of Windows that you are using. The first set of instructions is for Windows 3.1 and NT 3.51. The second set of instructions is for Windows 95 and Windows NT 4.0.

Note:

Before you try to dial a number, you must set up your Dial Preferences. Refer to the on-line help for instructions if you are not familiar with how to set your Dial Preferences.

Tip:

In Summary view, place the cursor over the number you wish to dial. Click on the number when you see the dial cursor:



Dial a phone number in Windows 3.1 and Windows NT 3.51:

1. Select the card containing the number you want to dial in List view.
2. From the Card menu, select **Dial**.
3. You see the CardScan AutoDialer dialog.

CardScan AutoDialer

Name
Richard J. Palmer
Vice President Marketing
USAPhone One Inc.

Number
(617) 555-1000
Tel (617) 555-1000
Fax (617) 555-1010

Local area code:

Outside line:

Dial Close Help

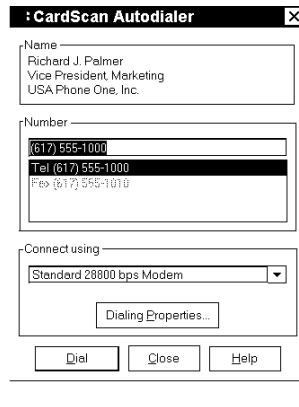
4. If you wish to dial a number other than the one displayed, select it from the list.
5. If this is the first time you have used CardScan to dial, enter the local area code so that CardScan skips the area code for local calls. CardScan automatically dials a "1" before long distance calls.
6. If you must dial a prefix (for example, 9) to get an outside line, click the Outside line box and enter the number.
7. Click **Dial** to make the call.
8. When the other party answers the phone, lift your handset.
9. Click HangUp to disconnect the modem.

Dial a phone number in Windows 95 and Windows NT 4.0:

1. Select the card containing the number you want to dial in List view.
2. From the Card menu, select **Dial**.
3. Click on the phone number.
4. You see the CardScan Autodialer dialog.

Tip:

In Summary view, place the cursor over the number you wish to dial. Click on the number when you see the dial cursor:



5. If you wish to dial a number other than the one displayed, select it from the list.
6. Click **Dial** to make the call. You see the call status at the bottom of the Autodialer dialog.
7. Pick up the receiver and click **Talk**.
8. Click HangUp to disconnect the modem.

Send a fax

You can address a fax to someone in your CardScan database directly from WinFax Pro or FaxWorks Pro, without having to export or import the card information.

Follow these steps to fax using WinFax Pro:

You can send faxes directly from WinFax Pro using the information in a CardScan database.

1. Start CardScan and open or select the database you want to use.
2. Start WinFax Pro.
3. If you are using WinFax Pro for Windows 3.1, select **Phonebooks** from the Fax menu.
OR
If you are using WinFax Pro for Windows 95, select **Phonebooks** from the Window menu.
4. Click on the CardScan phonebook to select it.
5. You see the contacts from the active CardScan database listed in WinFax. Use these names and fax numbers like any others to send faxes.

Follow these steps to fax using FaxWorks Pro:

You can send faxes directly from FaxWorks using the information in a CardScan database.

1. Start CardScan and open or select the database you want to use.
2. Start FaxWorks and select **Send Quick Fax** from the Fax menu, or print a document to the FaxWorks printer driver.
3. You see the Send Fax dialog.
4. Click the **CardScan** button.
5. In the Select Fax Recipients dialog, CardScan displays the name, company name, and fax number for each contact in the active database.
6. Click on a contact in the list to select a fax recipient.
7. Click **OK** and finish faxing as you would normally.

#9: *USE CARDS CAN WITH THE INTERNET*

You can use CardScan with the internet.

Use CardScan with an e-mail package to send a message through the internet. Use CardScan with your internet browser to go directly to a web site. In Summary view, all you have to do is click on the web address (URL) and CardScan will send you to that exact web site.

Send an e-mail

Tip:

In Summary view, place the cursor over the e-mail address. Click on the address when you see the e-mail cursor:



Note:

If you haven't already selected your e-mail package, CardScan displays a list of supported e-mail packages. Select yours from the list and click OK.

If you have a MAPI-compatible e-mail application, you can address e-mail using the address in CardScan. Follow these steps:

1. Select a card in List view.
2. Verify that there is a valid e-mail address in one of the e-mail fields. You can recognize an e-mail address because it includes the symbol "@".
3. From the Card menu, select **Send Mail To**.
4. CardScan launches your e-mail application and opens a new, blank message addressed to the selected recipient. If there is more than one e-mail address on a card, CardScan uses the first address in the e-mail field. If you want to use a different address, click on the address in the Summary view.

Go to a web site

A web site is an information resource accessed on the world wide web. Many companies provide information about new products, upgrades, and technical support issues using web sites. Each web site has a specific address, called a URL, which usually begins with "www" and is accessed using an application called a web browser.

A web browser is an application used to view information on the world wide web.

Most business cards now contain the URL for a web site. By simply displaying a card and selecting browse, you can connect to a web site directly from a card entry in CardScan.

Note:

You must have a web browser installed on your computer to use this feature.

Go to a web site from CardScan

You can connect to a web site directly from a card entry in CardScan. Follow these steps to go to a web site:

1. Select a card in List view.
2. Verify that there is a valid web site address on the card. The address should begin with "www" and must appear in one of the e-mail fields.
3. From the Card menu, select **Browse**.
4. If you want to connect to a different web address, click on the other address in Summary view.
If there is no web site in any of the e-mail fields, CardScan opens your web browser in its default mode.

Tip:

In Summary view, place the cursor over the web site address. Click on the address when you see the browse cursor:



#10: PRINT CARD INFORMATION

CardScan lets you print one card, selected cards, or all of your cards. You can use CardScan's many available print formats and page layouts to specify how you want the cards to look when printed.

Tip:

Use Notes to categorize cards for easy retrieval for printing. Refer to the on-line help for more information.



Keywords:

Notes, adding to a card

The print format determines what type of information is displayed on each page. The page layout tells CardScan what type of paper you are printing on (for example, labels) and where you want to print information on each page. You need to specify both when printing.

The following formats are available in CardScan:

- Address Book. Prints a two-column list with all card information except the Other field.
- Phone Book. Prints a three-column list with name, title, address, and phone numbers.
- Labels. Prints mailing labels with name, company and address.
- Rotary Cards. Prints card information in a two-column format similar to Summary view.
- Photo Album. Prints card images only. If a card has no image, CardScan uses the rotary card format.



Keywords:

print, format, page

CardScan includes over forty page layouts for printing on a variety of types of envelopes, labels, and personal organizer sheets. You can use one of CardScan's predefined page layouts, or create one of your own. For instructions on creating a custom page layout, refer to the on-line help.



Keywords:

card image printing


You can also print the card image. To learn how to print the card image, refer to the on-line help.

Print several cards

Tip:

You can also click the All button on the alphabet bar in the upper-left corner of the CardScan window.



 **Keywords:**
page layout

CardScan prints all cards displayed in List view. To print several cards, you must display those cards in List view.

1. To print all cards in your database, from the View menu, select **All Cards**.
OR
To print selected cards in your database, click in the Quick Search box and enter enough text to identify the cards.
2. Select **Page Setup** from the File menu.
CardScan remembers the Page Setup you last used. If you want to use the same setup again, you can skip directly to step six.
3. From the **Format Output For** drop-down list, select the type of document you want to print. Your selection controls what information is printed on each page.
4. In the Page Layout box, click on a layout to indicate the type of paper you are using.
If your type of paper is not listed, you can create a new Page Layout. Refer to the on-line help for instructions.
5. Click **OK**.
6. To preview the output before you print, select **Preview** from the File menu.
7. Click **Print** to send the output to the printer.
8. CardScan prints the card(s) using the layout options you selected.

Print a single card

CardScan prints all cards displayed in List view. To print a single card, you must display just that card in List view.

1. Click in the Quick Search box and type enough text to uniquely identify the card.
2. Select **Page Setup** from the File menu.
CardScan remembers the Page Setup you last used. If you want to use the same setup again, you can skip directly to step six.
3. From the **Format Output For** drop-down list, select the type of document you want to print. Your selection controls what information is printed on each page.
4. In the Page Layout box, click on a layout to indicate the type of paper you are using.
If your type of paper is not listed, you can create a new Page Layout. Refer to the on-line help for instructions.
5. Click **OK**.
6. Choose **Print** from the File menu.
7. CardScan prints the card using the layout options you selected.



Keywords:

page layout

Select a print format

Tip:

After you have selected a print format, select Preview from the File menu to quickly see what your format and layout will look like when printed.

When you print a set of cards from CardScan, the information printed on each page is determined by the Format and Page Layout you select in the Page Setup dialog box. To select a new print format, follow these steps:

1. Select **Page Setup** from the File menu.
2. Choose one of the options from the **Format Output For** drop-down list.
 - **Address Book.** Prints a two-column list with all card information except the Other field.
 - **Phone Book.** Prints a three-column list with name, title, address, and phone numbers.
 - **Labels.** Prints mailing labels with name, company and address.
 - **Rotary Cards.** Prints card information in a two-column format similar to Summary view.
 - **Photo Album.** Prints card images only. If a card has no image, CardScan uses the rotary card format.
3. CardScan will use your new layout settings the next time you print.

BONUS: HOTSYNC CARDSKAN WITH PALMPILOT ORGANIZER AND IBM WORKPAD

Note:

For more information about using CardScan with the PalmPilot, refer to the on-line help or the *Quick Start Guide: Using CardScan With PalmPilot and WorkPad*.



Keywords:

PalmPilot, WorkPad

CardScan's PalmPilot Conduit is a feature that allows you to HotSync CardScan with the PalmPilot Organizer and with the IBM WorkPad. The conduit is available only in a 32-bit version for Windows 95 and Windows NT, and with CardScan versions 3.0.5 and more recent.

The on-line help contains many helpful examples of ways you can use CardScan with PalmPilot Organizer and with IBM WorkPad. Refer to the on-line help to learn how to use this feature.

Enable/disable conduit

In order to exchange information between CardScan and a PalmPilot organizer, you need to **enable** CardScan's PalmPilot Conduit.

In order to exchange information between a PalmPilot organizer and other applications, you need to **disable** CardScan's PalmPilot Conduit.

Follow these steps to enable or disable CardScan's PalmPilot Conduit:

Tip:

Read the on-line help to learn about all of the ways you can use CardScan with the PalmPilot Organizer and the IBM WorkPad.

1. From Start, select Programs, then **CardScan**.
2. Select PalmPilot Conduit Setup from the CardScan program group.
3. You see the CardScan Synchronization Options dialog.
4. Click on the **General** tab.
5. To enable CardScan one-way or two-way synchronization, select enable.
To disable CardScan one-way or two-way synchronization, select disable.
6. Click **OK**.

NOTES
