

CardScan[®]

FOR MICROSOFT[®]
DYNAMICS CRM

Version 4.1

CardScan for Microsoft Dynamics CRM

CardScan for Microsoft Dynamics CRM is the fastest, easiest, most accurate way to enter leads and contacts into your Microsoft Dynamics CRM database. It maximizes your efficiency with such features as:

- Capturing records by scanning business cards and importing existing CardScan files and text files.
- Creating records simply by dragging and dropping data from emails, vCards, and other documents directly into the CardScan window.
- Adding other data that may be required to create Leads, Contacts, and Accounts.
- Associating contacts with existing accounts, as well as creating new accounts.
- Verifying the data accuracy and completeness, and preventing duplicate entries.

NOTE TO ADMINISTRATORS: For all administrative functions, see the *CardScanProAdmin.chm* Help file on the CardScan for Microsoft Dynamics CRM CD-ROM.

System Requirements

CardScan for Microsoft Dynamics CRM requires the following:

- Microsoft® Windows® 2000, XP Professional, or Vista
- Internet connection
- Pentium® P1 processor or later
- 128 MB RAM or greater
- 100 MB disk space
- CD-ROM drive
- USB port for scanner connection
- CardScan scanner – 700c or later

Installing CardScan for Microsoft Dynamics CRM

IMPORTANT: Install the CardScan for Microsoft Dynamics CRM software before connecting the scanner to your computer.

To install the software

- 1 Locate the software Product Key on the CD-ROM package. You will be prompted for this number during installation.
- 2 Log on as Administrator or to an account with Administrator privileges.
- 3 Insert the CardScan for Microsoft Dynamics CRM CD-ROM. If the CardScan for Microsoft Dynamics CRM installation program does not start automatically, choose **Start**→**Run**, enter **D:\setup.exe** (where D is the letter of your CD-ROM drive), and click **OK**.
- 4 Follow the on-screen instructions to finish installing CardScan for Microsoft Dynamics CRM.

To install the scanner

- ▶ Plug the scanner's USB cable into the computer's USB port after you install the software.

To install the Administrator application

- 1 Complete steps 1 - 3 in the software installation procedure on the previous page.
- 2 Choose **Custom** in the Setup Type window and click **Next**.
- 3 Add the **Administrator** component and continue with the installation.

NOTE TO ADMINISTRATORS: For information regarding silent installation, refer to *CardScan for Microsoft CRM Silent Install.doc* on the CardScan for Microsoft Dynamics CRM CD-ROM.

Activating CardScan for Microsoft Dynamics CRM

You have a 30-day grace period to activate CardScan for Microsoft Dynamics CRM. CardScan may be activated over the Internet or by telephone, if you do not have Internet access. If you do not activate CardScan within the grace period, you will no longer have access to the software.

Users must activate their own copy of CardScan. When the maximum number of activated users reaches the license limit, no other users will be able to activate CardScan. You must contact CardScan Technical Support to obtain additional activations.

Getting Started

Depending on which CardScan scanner you are using, you may need to calibrate the scanner on your first CardScan for Microsoft Dynamics CRM startup.

To scan your first business card

- 1 Choose **Start→Programs→CardScan→CardScan for Microsoft Dynamics CRM**. The CardScan for Microsoft Dynamics CRM window opens and displays the Calibrate dialog box (only for the CardScan 700c scanner).
- 2 If you have a CardScan 700c scanner, follow the on-screen instructions for calibrating the scanner. If you have a CardScan 800c scanner, you do not have to calibrate the scanner.
- 3 Check the Status line at the bottom of the window. If the scanner is connected properly, the Status line says: **Ready to scan. Please insert card.**
- 4 Begin scanning by inserting a business card into the scanner. The scanner scans the card and displays the Scanning Options dialog box.

Information and Support

- For **Online Help**, press **F1** or choose **Help→Contents**.
- For the **ReadMe** file, choose **Help→View ReadMe**.
- For **Online Support**, click **CardScan Support** on the Help menu bar.

For Information

CardScan
25 First Street
Suite 107
Cambridge, MA 02141

For Technical Support

- Call **800-316-8893** or **617-492-4200**
10:00 A.M. – 6:00 P.M. EST Monday – Thursday
10:00 A.M. – 5:30 P.M. EST Friday
- Send an email to **prosupport@cardscan.com**
- Visit the Support section at **<http://www.cardscan.com>**

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