



Scan2CRM for ACT!

User Guide



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APPENDIX

Warranty I
Notice to userII
PublicationIII
TrademarksIV

Version 9.50 - Supports ACT! by Sage for windows, ACT! 2007 (Version 9) and above.

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TABLE OF CONTENTS

1. INTRODUCTION.....5

- Overview 5
- Features 5
- Scanner Specifications 5

2. GETTING STARTED.....6

- Before Using the Scanner..... 6
- Minimum System Requirements 6
- Connecting the Scanner 6
- Installation 6
- Uninstall 7
- SCAN2CRM FOR ACT! Window 7

3. USING SCAN2CRM FOR ACT!.....8

- Application State..... 9
 - Setting the application state 9
- Configuring Scan2CRM for ACT!..... 9
- Scanning cards 9

4. CONFIGURATION.....10

- Scan2CRM for Act! Window..... 10
 - 1. About tab 10
 - 2. General tab 11
 - 3. Maintenance tab..... 11
- Scanner calibration 12
 - Calibrating the scanner 12
 - Cleaning the scanner..... 12
- 4. ID Settings tab..... 12
- 5. Image tab 13



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5. APPENDIX A: TROUBLESHOOTING.....14

6. Appendix B: Adding an Image field to the Act! contact layout.....15

1. INTRODUCTION

Overview

Scan2CRM for ACT! is an add-on application for the ACT! CRM software suite.

Scan2CRM for ACT! scans business cards and automatically inputs both their textual data and image to a new contact record in ACT!.

Within seconds of placing a card into the scanner, **Scan2CRM for ACT!** pulls the information off the card using OCR – Optical Character Recognition technology, and automatically populates the text fields of a new ACT! contact record (name, title, phone number, etc.), while also capturing an image file of the card.

Scan2CRM for ACT! works directly from within ACT!, making it the only business card scanning package that does not require cards to be scanned into a 3rd party application before the information can be imported into ACT!.

Features

- Fully integrated into ACT!
- Scan business cards directly and automatically into ACT!
- Capture both data and image
- Just a few seconds per scan
- Auto detect function - just place the card in the scanner (text face down)

Scanner Specifications

- Powered by the computer USB – No external power source is needed
- Small footprint
- Fully mobile

2. GETTING STARTED

Before Using the Scanner

The scanner has been carefully packaged to avoid damage during transportation. Before operating the scanner, please remove the packaging materials. After removing the packaging materials, you will find the following:

- ScanShell scanner
- USB interface cable
- Calibration paper
- Cleaning paper
- Cardboard cutout with software download link.

Minimum System Requirements

The minimum system requirements are:

- Pentium IV with 512MB
- USB port
- Microsoft Outlook 2000 or higher installed

Connecting the Scanner

The scanner is connected to the computer via the USB port. To connect the scanner, do the following:

- Place the scanner on a flat, firm, solid surface with easy access.
- Plug the USB interface cable into the USB port of the computer

Installation

1. To install the software on the computer, do the following: Close all programs.
2. We recommend downloading the program before connecting the scanner.
3. Locate the license key on outside of the box (16 characters)
4. Go to the software download link: <http://autorun.card-reader.com> from the Cardboard cutout insert and type the license key in the box.
5. Install the program after the download has finished, and select the scanner model during the setup.
6. Setup will check if Microsoft .NET framework 1.1 or higher is installed on your computer. If it is not installed, setup will prompt you to install it. Click "Yes" to install Microsoft .NET framework or "No" to skip Microsoft .NET framework installation. Please note that if Microsoft .NET framework 1.1 or higher is not installed on your computer, you will not be able to install and use *Scan2CRM*.
7. Select your CRM software from the list when prompted.
8. Attach the scanner after setup has finished
9. After the *Add new hardware wizard* dialog box appears, click *Next* to install the drivers automatically.
10. After you specify the driver, click *Next*.

11. You will be presented with a standard Windows message. Note: Scanner model may vary.



- Click "*Continue Anyway*" The installation of Scanshell scanner drivers is safe for your computer and will not affect your system.
- Click "*Next*" until the installation is complete.

Uninstall

To uninstall the software, open the *Add-Remove Programs* from the control panel. Select **Scan2CRM for ACT!** and click on *Add/Remove*. Follow the uninstall instructions until the operation is completed (ACT! must be closed).

SCAN2CRM FOR ACT! Window

The **Scan2CRM for ACT!** window is opened by pressing the **Scan2CRM for ACT!** button on the ACT! toolbar.








3. USING SCAN2CRM FOR ACT!

Scan2CRM forACT! adds a small toolbar in ACT!_which is loaded at ACT!'s startup.

Note: If you purchased ACT! 2010 through 2011 the Toolbar will be underneath the tool menu.



Scan2Contacts Toolbar in ACT!,

| | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Scan2CRM for Act! | Opens a <i>Scan2CRM for Act!</i> window with version information, setup, and scanner maintenance options |
|    | State | The <i>State</i> buttons indicate the current state of the application:  = Enabled, scanner is connected  = Enabled, scanner is disconnected  = Disabled |

Note: If **Scan2CRM for ACT!** is enabled, the application will detect the scanner status (connected/disconnected) automatically, and switch the icon color accordingly. If the application is disabled, no detection of scanner status is performed.

The scanner must be calibrated prior to scanning business cards, please refer to [Calibrating the scanner, page 12](#) for instructions. Once the scanner is calibrated make sure the configuration window is closed to begin scanning business cards.

Application State

When the application loads, its state is set to *Enabled* by default.

Setting the application state

- Press on the state button to toggle between *Enabled* and *Disabled* states.
- If the application is enabled (green button), pressing on the state button will disable the application and the button will become gray.
- If an error occurred while the application was loaded, the state will be set to *Disabled*. You can try to enable the application by pressing on the state button. If this does not help, check if the scanner is properly connected and try again.

Configuring Scan2CRM for ACT!

See 4. C, page 10.


Scanning cards

- Place the business card in the scanner with the text face down.
- If the card is a horizontal card, place the card into the scanner horizontally and if the card is vertical, place the card into the scanner vertically. (If you do not do this, the software will automatically rotate the card.)
- Your card will be automatically detected, scanned in, and inserted automatically into a new ACT! Contact record.

Note: By default, the ACT! contact's layout does not contain a special image field, and images are kept in the "Notes" section of the Contact record. You can however add an image field to the contact layout, by selecting Design Layouts->Contact under the ACT!'s Tools menu. For detailed explanation on how to perform this procedure, please see [Appendix B: Adding an Image field to the Act! contact layout, page 14-15](#), or consult ACT!'s user guide.

4. CONFIGURATION

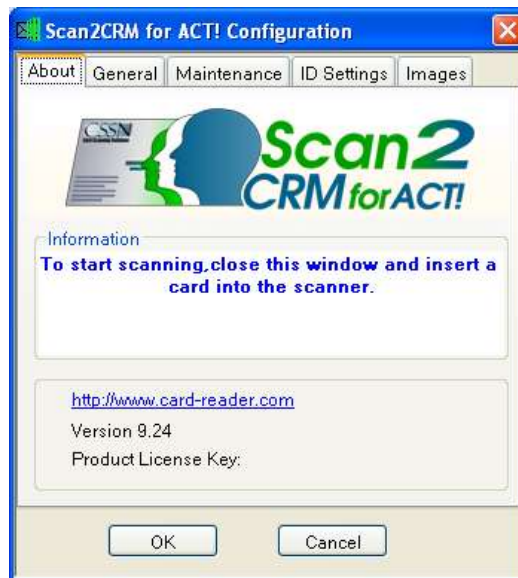
Scan2CRM for Act! Window

Open the **Scan2CRM for Act!**  window by pressing the **Scan2CRM for Act!** button on the **Scan2CRM for ACT!** toolbar.

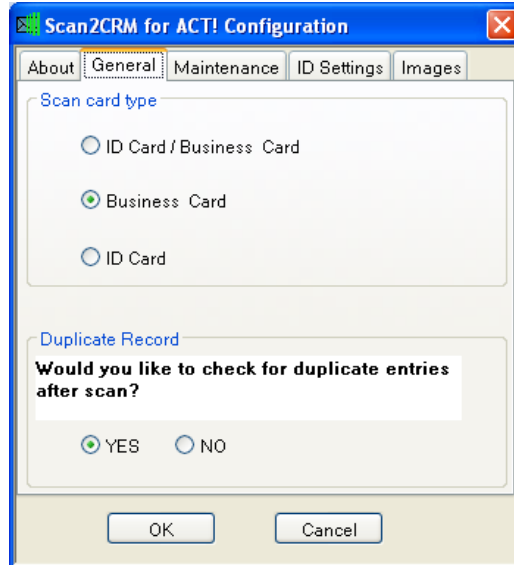
Note: If you purchased ACT! 2010 through 2011 the Toolbar will be underneath the tool menu.

The **Scan2CRM for ACT!** window has five tabs:

1. **About tab** – Displays the version information.



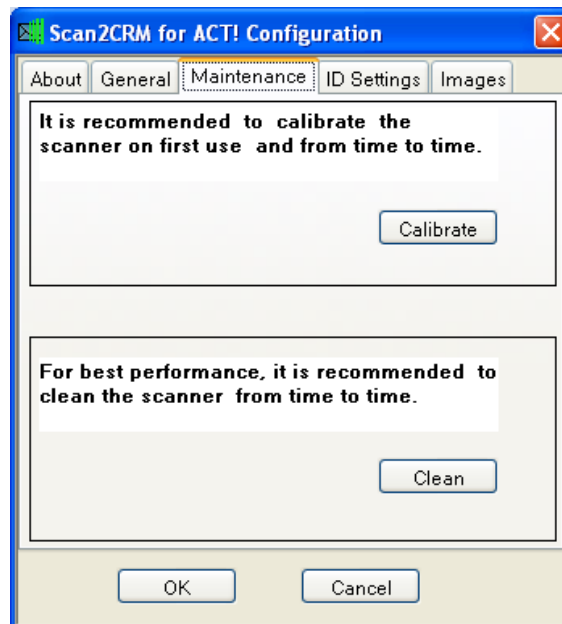
2. **General tab** – Will automatically select Business Card.



Business card – for scanning business cards

Note: The grayed-out options (ID card/Business card and ID card) are not available with the ScanShell 800NR scanner.

3. **Maintenance tab** – This tab is used for calibrating and cleaning the scanner – it is necessary for ensuring proper functioning.



Scanner calibration

Scanner calibration resets the scanner color sensor and generates higher accuracy in the OCR detection process. When you use the scanner for the first time, you will be prompted to calibrate the scanner.

Calibrating the scanner is also a good idea if you notice deterioration in scanning and OCR quality.

Calibrating the scanner

- Open outlook.
- Open the Scan2Contacts window.
- Click the *'Calibrate Scanner'* button.
- Insert the calibration paper that came with the scanner with the black and white stripe facing down.
- Click OK.

Note: The scanner **must** be calibrated before the first use and from time to time.

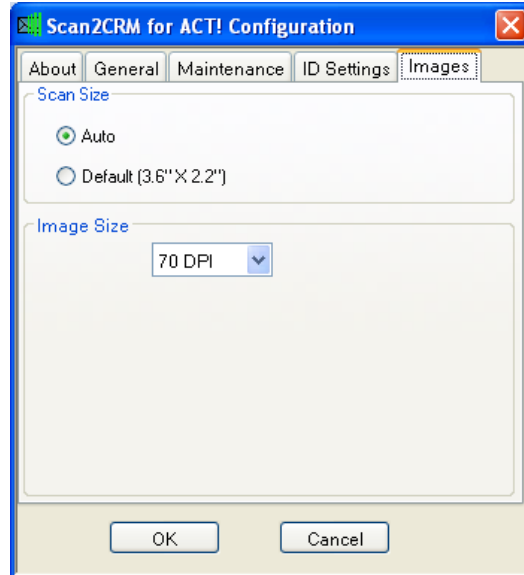
Cleaning the scanner

It is recommended to clean the scanner from time to time, especially if you notice irregularities and deterioration in scanning and OCR quality.

- Open ACT!
 - Open the **Scan2CRM for ACT!** window Click the *'Clean Scanner'* button.
 - Insert the cleaning paper that came with the scanner. You can add a few drops of alcohol or cleaning solution to the cleaning paper.
 - Click OK.
4. **ID Settings tab** – This tab is unavailable with the ScanShell 800NR scanner.



5. **Image tab** – This tab allows you to select and specify the scanned area and image size.



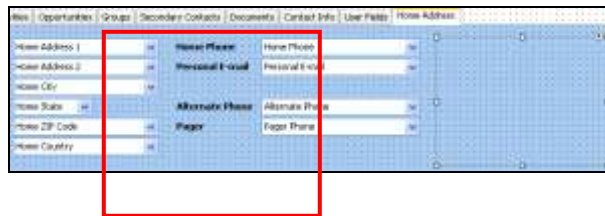
- **Scan Size** - Specify the scanned area size:
 - ♦ Auto – The scanner detects the card size automatically.
 - ♦ Default – Save the image in a default visit card size of 3.60X2.20 inch. This is the best option for scanning dark color cards.
- **Image Size** - Specify the resolution of the scanned image: Higher resolution results in better image quality, and higher scanned image file size.

5. APPENDIX A: TROUBLESHOOTING

| Description | Solution |
|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| When I try to enable Scan2CRM for ACT! I get an error message, which says that another CSSN application is open. | Scan2CRM for ACT! can't work while another CSSN application is running. To activate Scan2CRM for ACT!, close the other application and press on the state button in the toolbar. |
| I opened ACT! and got an error message from Scan2Act. | Scan2CRM for ACT! failed to load. Check if the scanner is connected properly, and press on the state button in the toolbar. If Scan2CRM for ACT! is not enabled, contact the support team. |
| The application state is set to Disabled on startup. | Try to enable the application by pressing on the state button. If this does not help, check if the scanner is properly connected and try again. |
| There are irregularities or deterioration in scanning and OCR quality. | Re-calibrate your scanner, see page 12. |
| After scanning, the image is black. | Re-calibrate your scanner, see page 12. |
| Black line down the middle of the scan. | Re-calibrate your scanner, see page 12. |
| ACT! freezes when I scan a business card. | Make sure that the card is placed into the scanner with the text face down. |
| When a card is scanned face down, the processing window just freezes and locks up my ACT! | Please recalibrate the scanner and try again. (See page 12.) |
| Scan2CRM for ACT! isn't showing up in my ACT!. | Please disconnect any palm or smart phone devices, disable <i>Active Sync</i> and restart ACT!. |
| Scanner stops working after being idle for a while. | <p>This usually occurs when the computer turns off the USB port to save power. Try unplugging the scanner and then plugging it in again.</p> <p>For a permanent solution:</p> <ol style="list-style-type: none"> 1. Right click on "My Computer" and select "Manage". 2. On the left side in "Computer Management" click "Device Manager". 3. On the right, look for "Universal Serial Bus controllers" or "USB controllers". 4. Right-click on "USB Root Hub" and select "Properties". 5. Choose the "Power Management" tab and uncheck the option "Allow the computer to turn off this device to save power", then click OK. 6. Repeat this for each "USB Root Hub". 7. Restart the computer. <p>You may also need to install an update from Microsoft. For more information: http://support.microsoft.com/?kbid=822603</p> |
| Any other problem or question | <p>Contact our technical support at http://www.card-reader.com/support_ticket.htm</p> <p>For customer support in Europe, please contact our technical support at http://www.cardscanning.com</p> |

4. The Select Field dialog appears. Press *New Field*. The Define Fields screen opens:

- Fill in a name for the field e.g., "Member Photo".
 - Select *Picture* from the *Field Data Type* dropdown list.
 - Leave the other default selections as they are.
 - Click *Finish*.
5. The field you created will now appear in the field list of the Select Field dialog. Select it.
6. If you want a label with the field name to appear next to the field, select the *Include a Label* checkbox,
7. Click *Add*.
8. Now you can change and edit the Picture field properties – resize it, change its borders etc.



9. Press *Save* in the main tool bar, and close the Layout Designer dialog.
10. After you close the Layout Designer dialog, you should see the field in your contact details screen, where you placed it.
11. From now on, when you scan a card the card image will appear on this spot (in addition to being added to the notes).