



## **Scan2MSCRM Installation Guide**

Microsoft Dynamics CRM 3.0 compatible

Microsoft Dynamics CRM 4.0 compatible

Version 2.0.0

[www.card-reader.com](http://www.card-reader.com)





## Table of Contents

<b>Table of Contents</b> .....	2
<b>Overview and Notes</b> .....	3
Overview .....	3
Microsoft CRM Compatibility.....	3
System Requirements .....	3
<b>Installation Instructions</b> .....	4
<b>Connecting the Scanner</b> .....	7
<b>Activation</b> .....	8
For Activation Key of Scan2MSCRM .....	8
Software Activation.....	8
<b>Uninstall Instructions</b> .....	9



## Overview and Notes

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### Overview

This document outlines the process of installing Scan2MSCRM.

### Microsoft CRM Compatibility

Scan2MSCRM is compatible with Microsoft Dynamics CRM versions 3.0 and 4.0. For additional product information, please visit

[http://www.card-reader.com/scan\\_to\\_microsoft\\_crm.htm](http://www.card-reader.com/scan_to_microsoft_crm.htm)

### System Requirements

Scan2MSCRM requires:

- Microsoft CRM 3.0 or 4.0
- Windows Vista/XP
- Valid ScanShell 800N Scanner
- .NET Framework 2.0



## Installation Instructions

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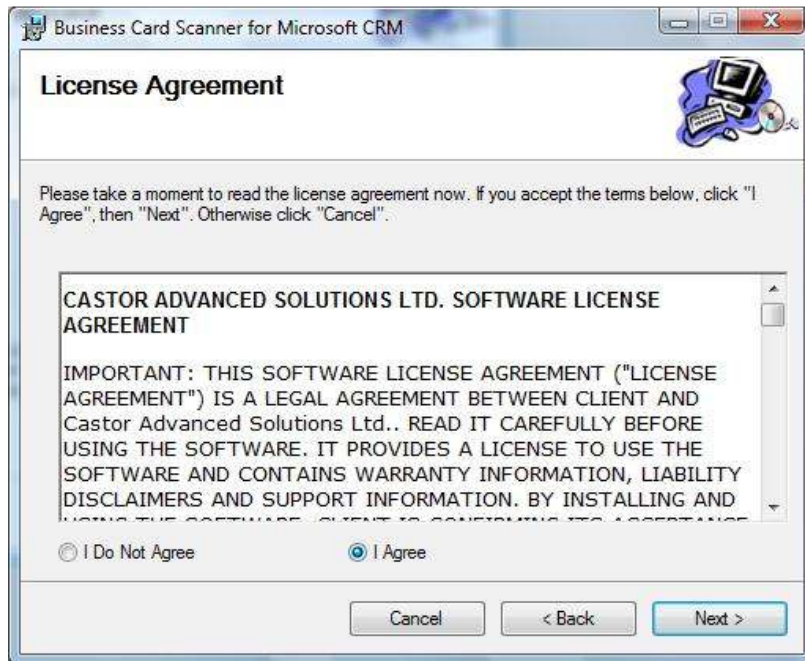
To install the product the installation application must be run on the Microsoft CRM **User** Computer by a user with Administrator privileges for the local computer. The installation of Scan2MSCRM requires the Scan2MSCRM.msi file which can be downloaded by visiting [http://www.card-reader.com/scan\\_to\\_microsoft\\_crm.htm](http://www.card-reader.com/scan_to_microsoft_crm.htm).

### Steps to install Scan2MSCRM

1. Download the Scan2MSCRM.msi file into a folder on your personal computer.
2. Double click the file. You will see the following screens.



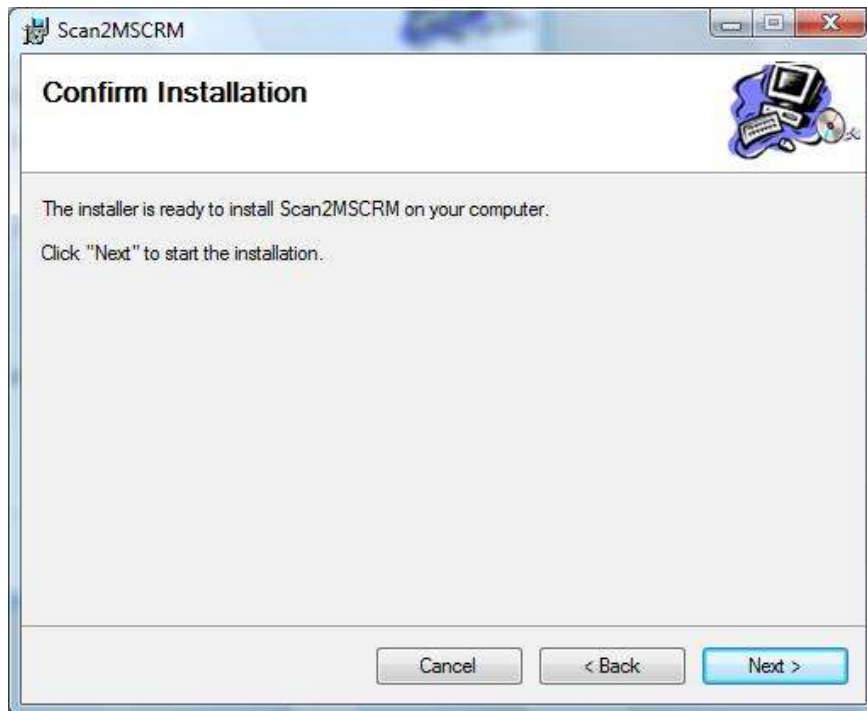
3. Click '**Next**' to begin the installation process.



4. If you agree with the terms of the license agreement, select the option labeled 'I Agree' and click 'Next'.



5. Click 'Next' to install to the folder in the default directory **OR** Click 'Browse' and select the destination folder of your choice. Then click 'Next'.



6. Click '**Next**' to install Castor Business Card Scanner for Microsoft CRM 4.0.

The installation of Scan2MSCRM is now complete.

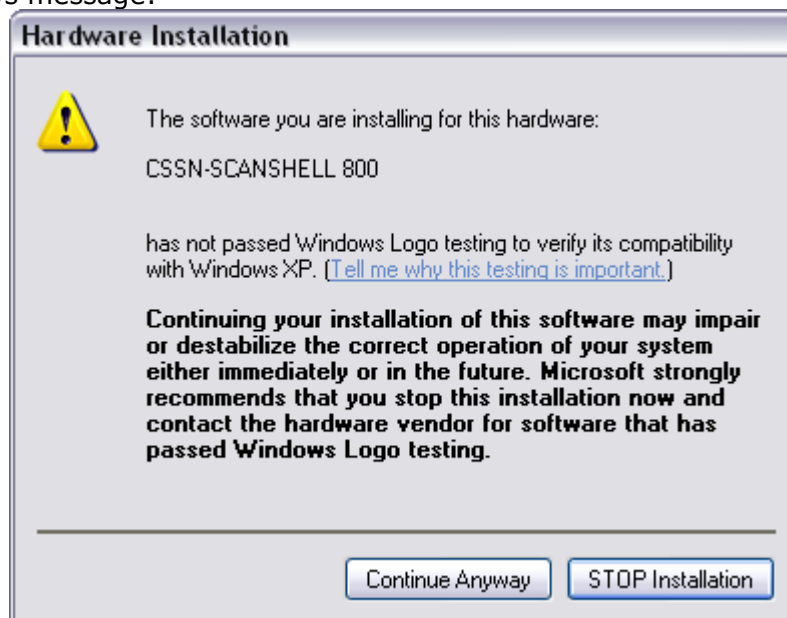
To access the product and use it you must perform activation using the product key that was provided to you. For questions about obtaining product key and performing Activation please refer to the section of this document titled 'Activation'.

## Connecting the Scanner

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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.
  
- After the Add new hardware wizard dialog box appears, click Next until you are asked to set the driver for the reader. You'll find the ScanShell 800N driver at [http://www.card-reader.com/support\\_downloads.htm](http://www.card-reader.com/support_downloads.htm)
  
- After you specify the driver, click Next You will be presented with a standard Windows message:



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



## Activation

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### For Activation Key of Scan2MSCRM

Activation Key can be obtained from Card Scanning Solutions upon request.

### Software Activation

Activation is made once. Use the activation key provided to you to perform the activation. Insert the key to the text box and press the button to activate.

A screenshot of the "Scan 2 Microsoft Dynamics CRM" activation dialog box. The window title is "Scan 2 Microsoft Dynamics CRM". The main heading is "Activation" with the instruction "Activate the product using the activation key that was provided for you". There is a text input field labeled "Please insert activation key:" and an "Activate" button below it. A note states "\* Please note: Activation requires internet connection." Below the note is a link: "Don't have activation key? [Click here to purchase activation key!](#)". At the bottom of the dialog is a checkbox labeled "Continue in Demo mode (Use sample data for product demonstration)". The bottom of the window contains three buttons: "Cancel", "< Back", and "Next >". The Scan2 Microsoft CRM logo is visible in the top right corner of the dialog box.



## Uninstall Instructions ---

### Steps to uninstall Scan2MSCRM

1. On the user computer where you installed the product navigate to 'Control Panel' and open 'Add or Remove Programs'
2. Select Scan2MSCRM from the list of the currently installed programs
3. Click 'Remove'
4. Click 'Yes' in the confirmation message box to begin the uninstall process.