



## **Scan2MSCRM User Guide**

Microsoft Dynamics CRM 3.0 compatible  
Microsoft Dynamics CRM 4.0 compatible

Version 3.0.0

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

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## Scan2MSCRM

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### *Overview*

Scan2MSCRM enables MS CRM users to quickly and easily import business card information into Microsoft CRM. The product uses a simple wizard that guides the user through the steps of importing the information into MS CRM.

### *Features*

Scan2MSCRM features include:

- Creating Lead record from Business Card information.
- Creating Contact record from Business Card information.
- Creating Account record from Business Card information.
- Support for Microsoft CRM 3.0/4.0.
- Detection of duplicates based on name and/or email and/or phone number.
- Data validation screen.
- Imports the card scanned image as a note.
- Advanced Field map tool.
- Support for offline mode (4.0).
- Support for multiple organizations.
- Ability to run in demo mode for demonstration purposes.

**Scan2MSCRM was certified by Microsoft  
For Microsoft CRM 4.0**



### ***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 3.0/4.0
- Windows Vista/XP
- .NET Framework 2.0
- ScanShell 800N



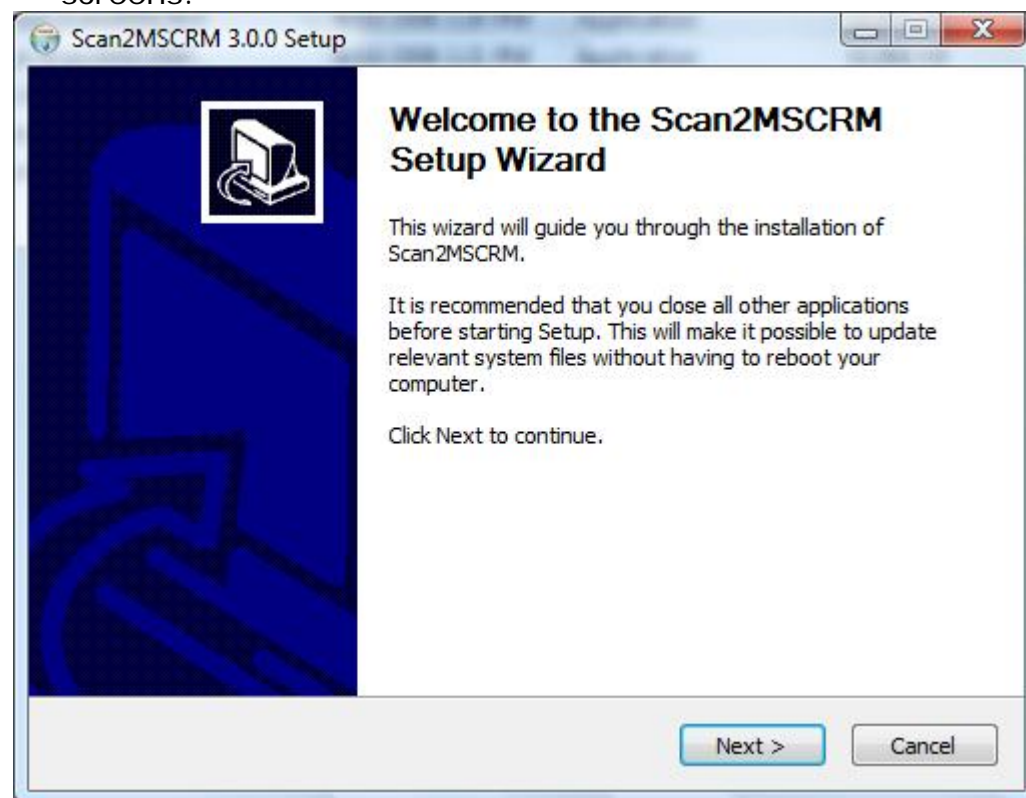
## Installation Instructions

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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.exe 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).

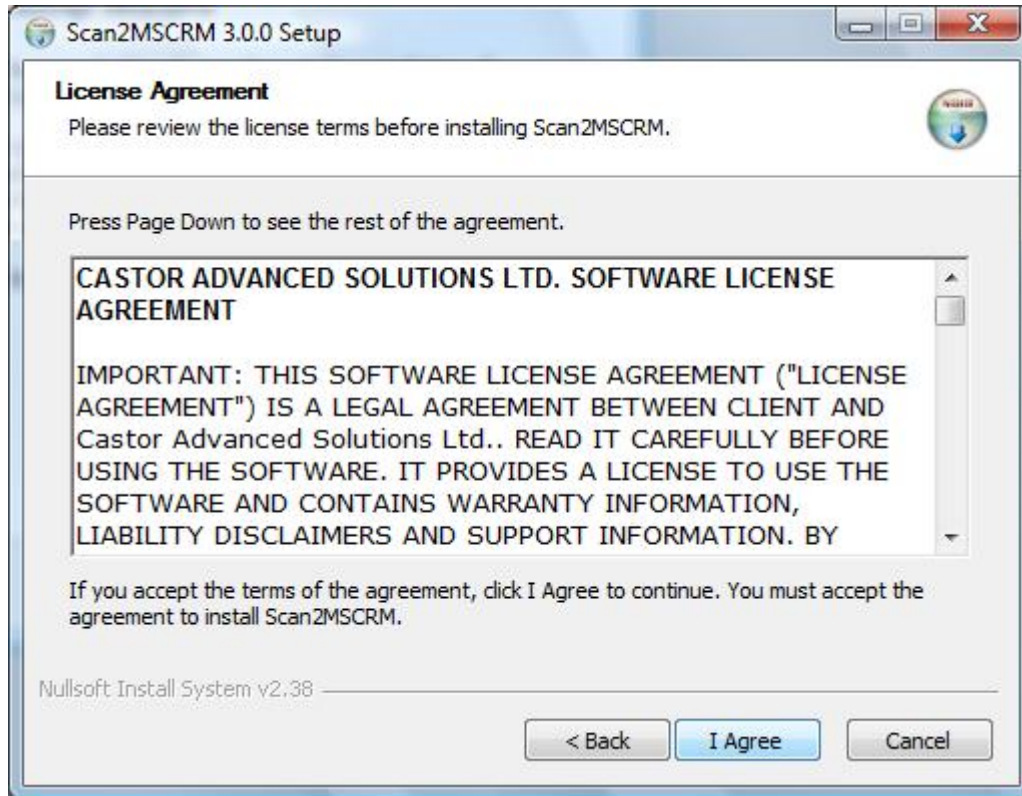
### *Steps to install Scan2MSCRM*

1. Double click the 'Scan2MSCRM.exe' file. You will see the following screens.



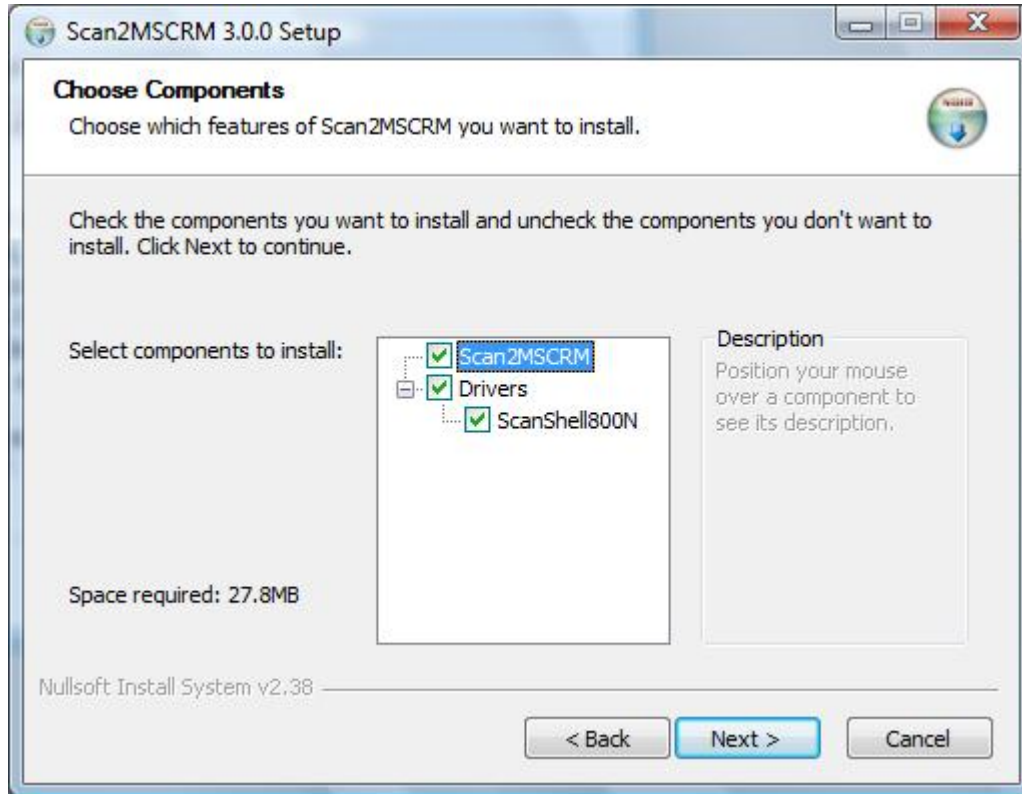


2. Click '**Next**' to begin the installation process.
3. If you agree with the terms of the license agreement, select the option labeled 'I Agree' and click '**Next**'.



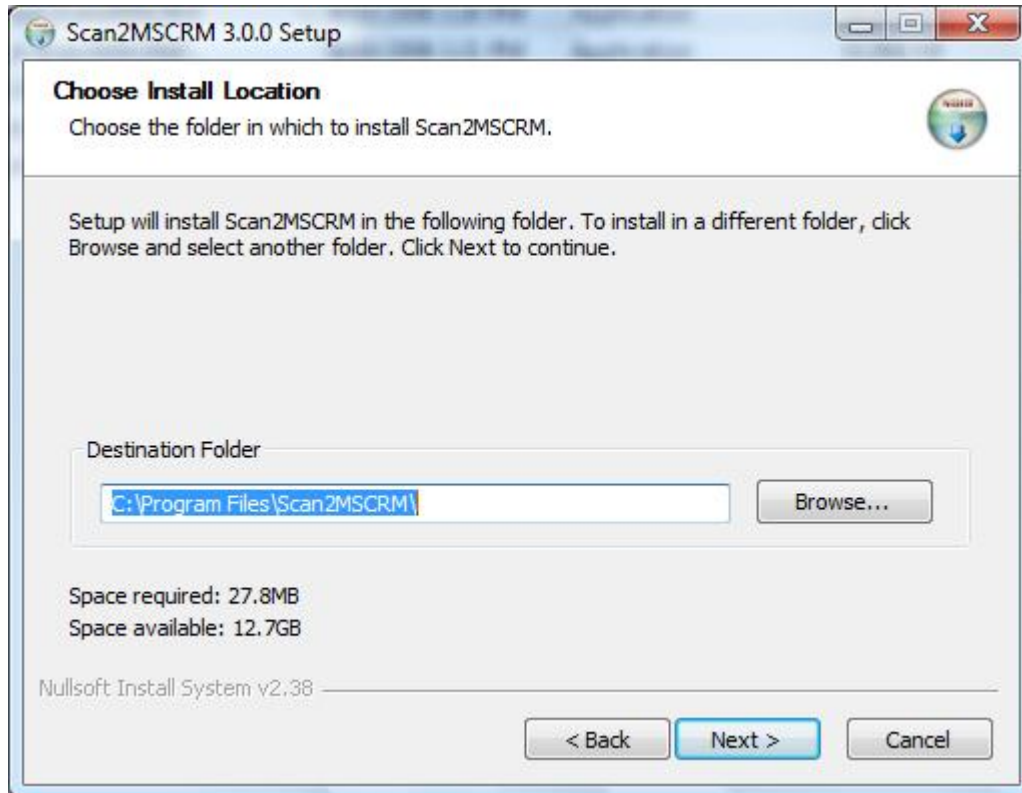


4. Select the components for installation which include the application files and hardware drivers. Then click **'Next'**.



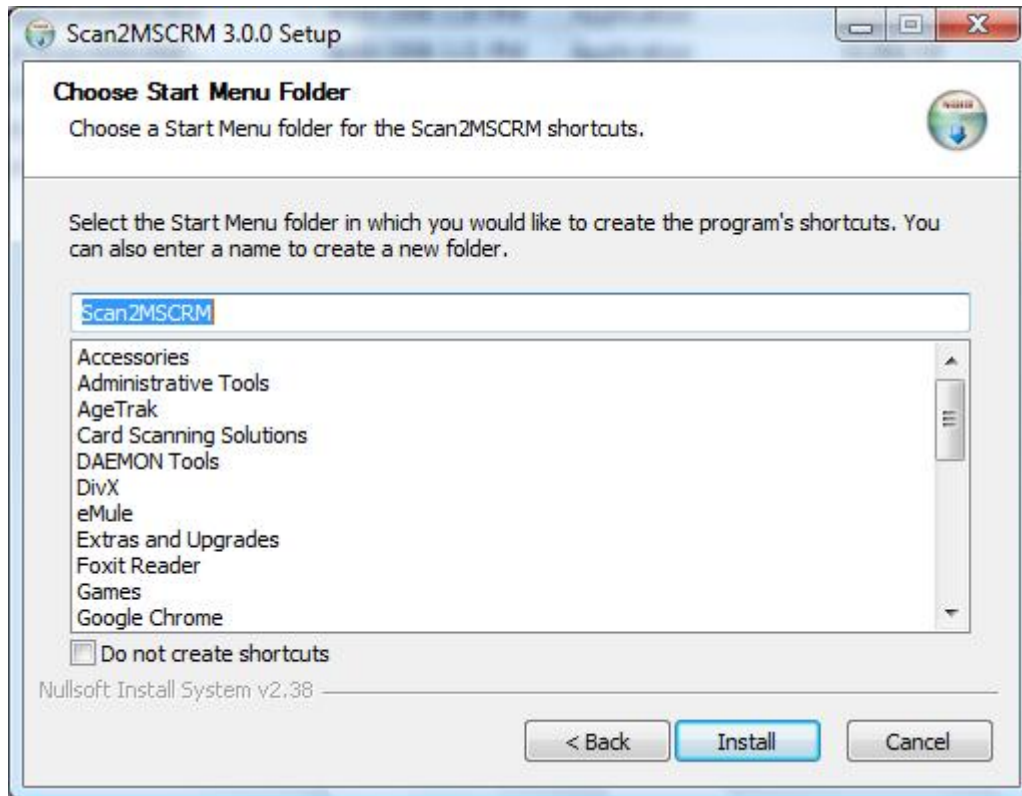


5. Choose the installation location. Then click **'Next'**.



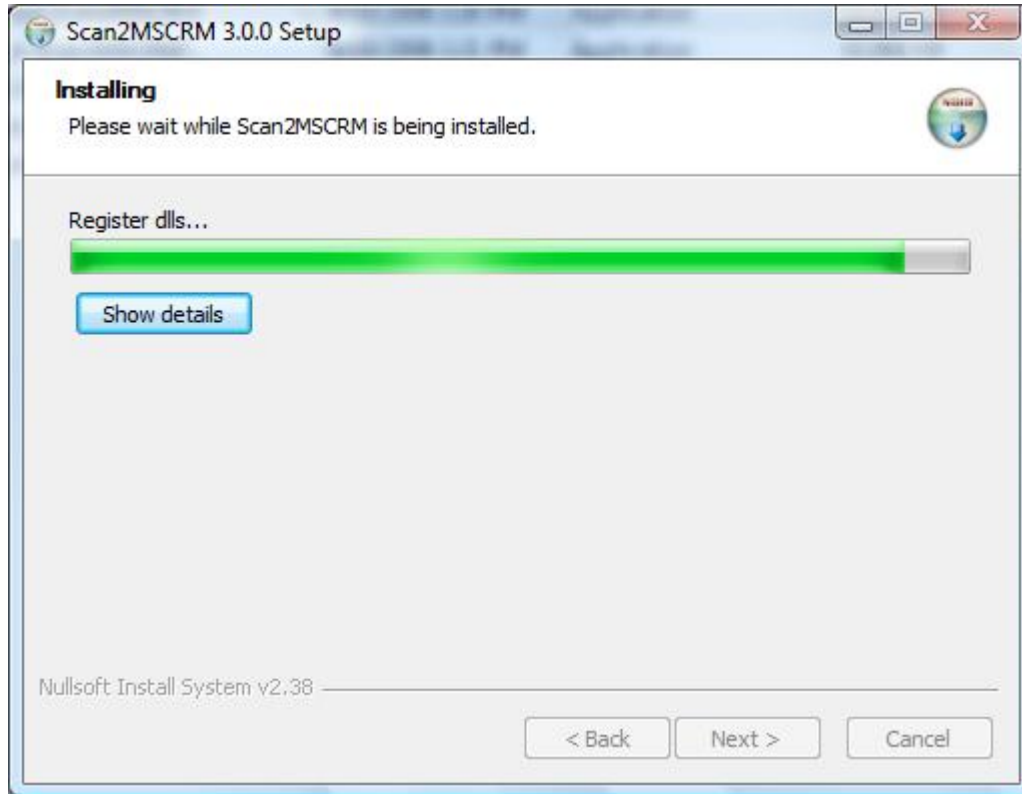


6. Choose start menu folder and link name. Then click **'Next'**.

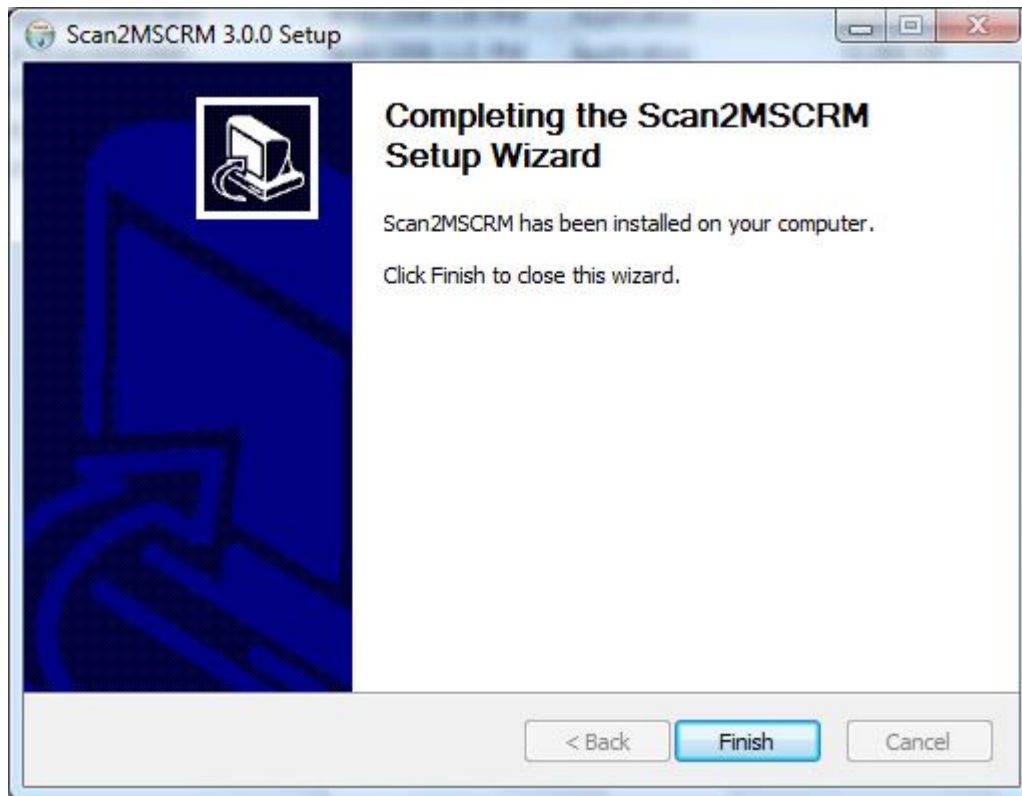




7. Wait for installation to complete.



8. Installation Completed!



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

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-scanner.com/download.html>
- 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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Activation Key can be obtained from Card Scanning Solutions upon request. 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". Below this, there is a section titled "Please insert activation information:" containing three text input fields: "Company:", "Email:", and "Key:". An "Activate" button is positioned below the "Key:" field. A note states "\* Please note: Activation requires internet connection." Below the note, there is a link: "Don't have activation key? [Click here to purchase activation key!](#)". At the bottom of this section, there is a checkbox labeled "Continue in Demo mode (Use sample data for product demonstration)". The dialog box has a "Cancel" button at the bottom left, and "< Back" and "Next >" buttons at the bottom right.

**You can choose to run the application in demo mode without activating it by marking the demo check box. Doing so will force the application to use sample data for demonstration.**



## Uninstall Instructions

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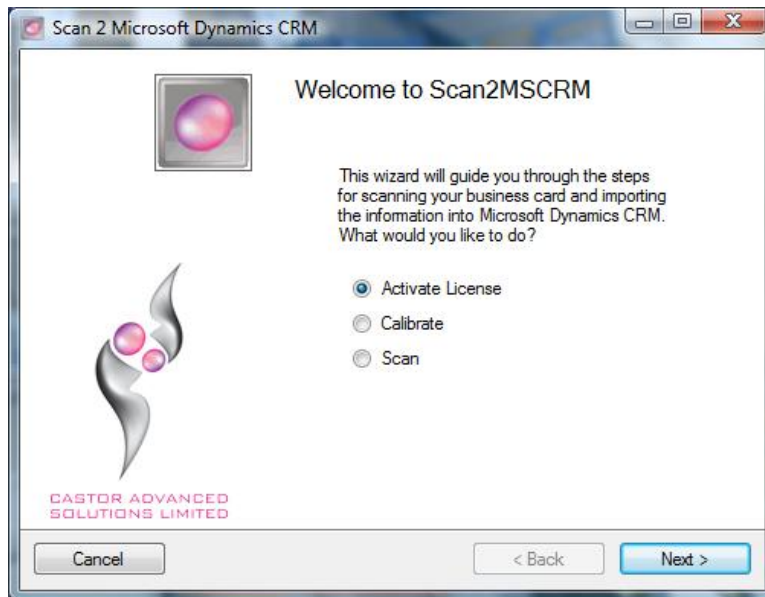
### Steps to uninstall Scan2MSCRM

1. On the user computer where you installed the product navigate to start menu and then Scan2MSCRM folder.
2. Click the 'Uninstall' icon.
4. Click 'Uninstall' in the confirmation message box to begin the uninstall process.

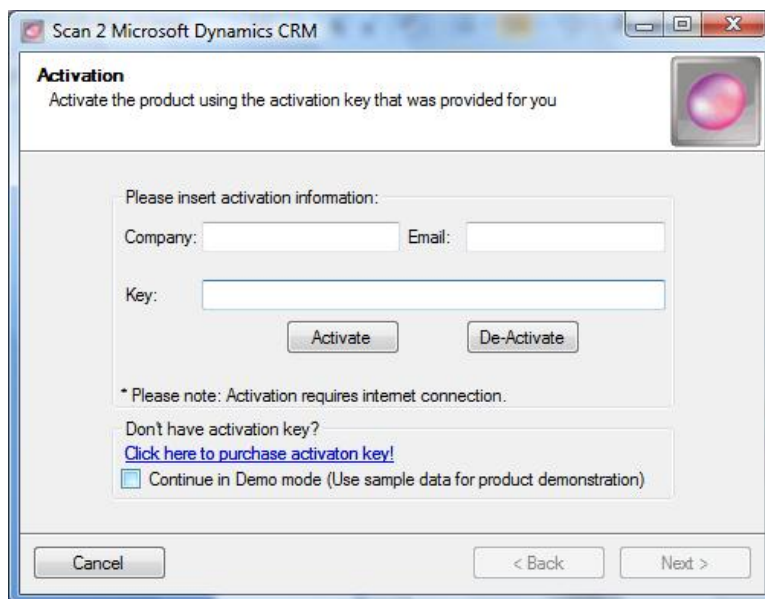


## Importing Card Information \_\_\_\_\_

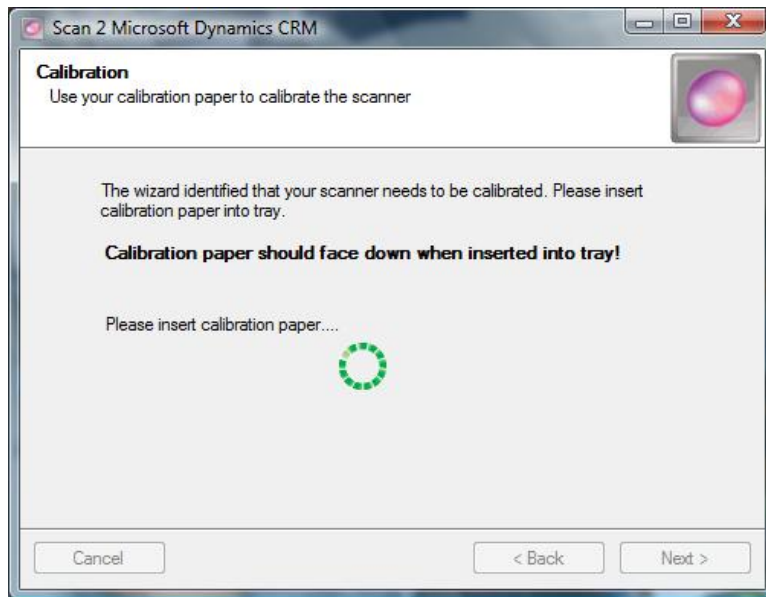
1. Before launching the application, please **make sure** you have installed the ScanShell 800N driver and connected the scanner according to the instruction in the **Installation Guide** document.
2. Plug the scanner USB to your computer.
3. To launch the Wizard application for importing your Business Card information into MS CRM, double click the icon located on your desktop or navigate to Start -> All Programs -> Scan2MSCRM and click on the application icon.
4. Follow the following guidelines for using the Wizard:



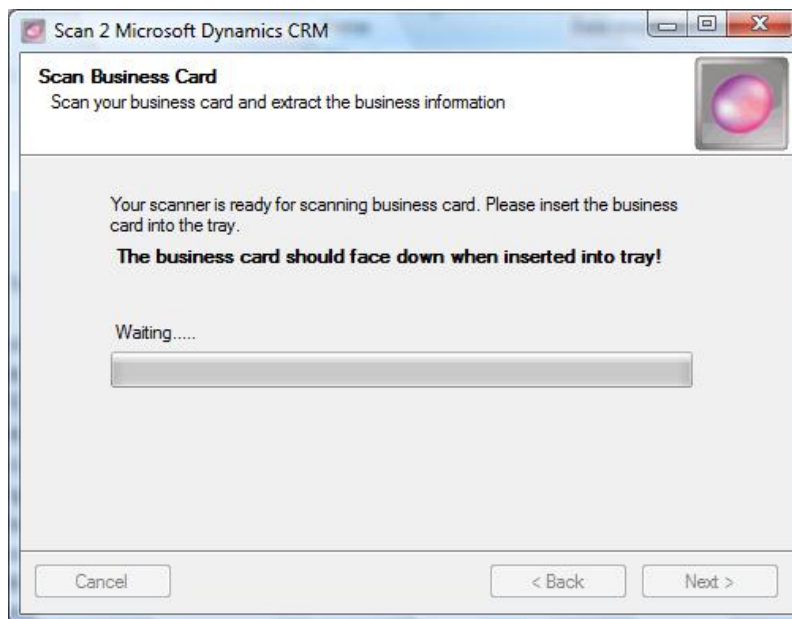
1. **Welcome** step presents short introduction. Choose your next step by clicking on one of the radio buttons.



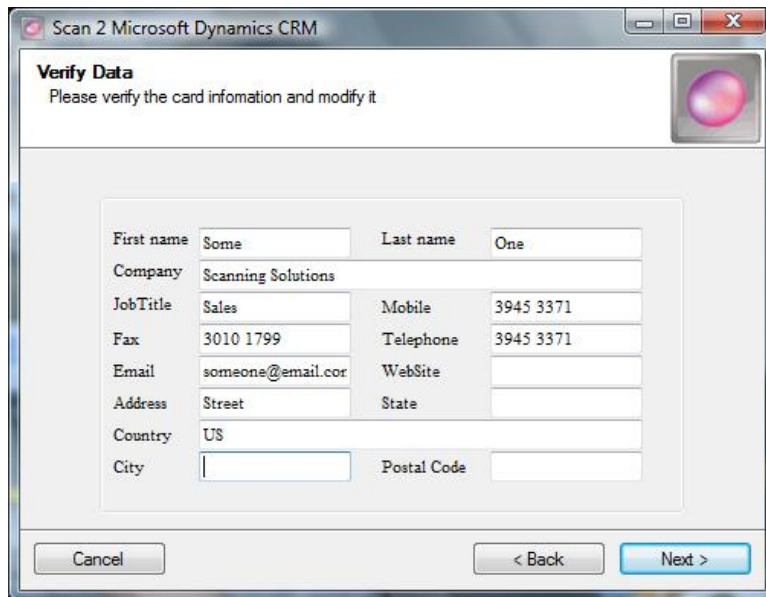
2. **Activation** is made once. Use the activation key provided to you to perform the activation. Insert the key to the text box and press the button to activate. **Deactivation** can be made to remove the license.



3. Sometimes the scanner needs to be calibrated. The **Calibration** step will help you to calibrate the scanner. Use the **Calibration Paper** provided to you with the scanner and insert the paper with the black stripes facing down.

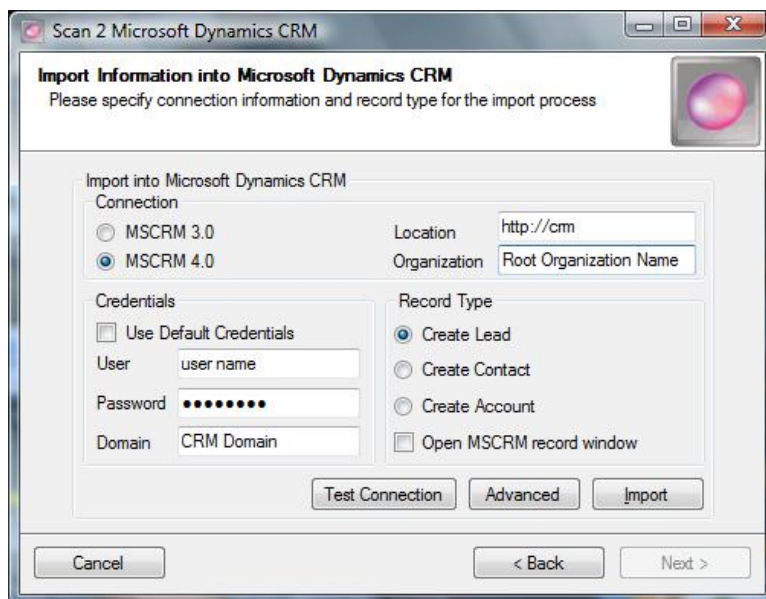


4. You can now **Scan** your business card. Insert the business card into the tray with the information facing down. When finished, the wizard will automatically bring you to the next step.



First name	Some	Last name	One
Company	Scanning Solutions		
JobTitle	Sales	Mobile	3945 3371
Fax	3010 1799	Telephone	3945 3371
Email	someone@email.cor	WebSite	
Address	Street	State	
Country	US		
City		Postal Code	

5. **Verify** the information that was extracted from the card. Use this step to add/change the information before importing it into MS CRM.

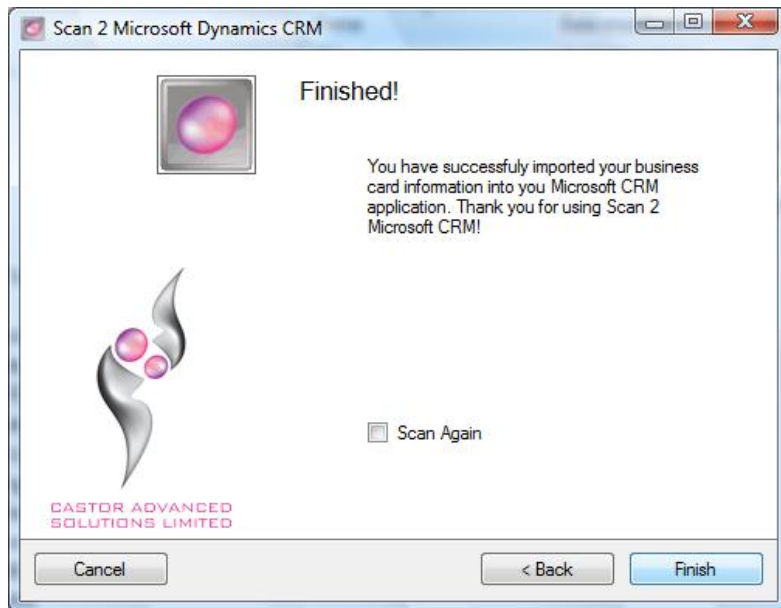


Import into Microsoft Dynamics CRM	
Please specify connection information and record type for the import process	
Import into Microsoft Dynamics CRM	
Connection	
<input type="radio"/> MSCR 3.0	Location <input type="text" value="http://crm"/>
<input checked="" type="radio"/> MSCR 4.0	Organization <input type="text" value="Root Organization Name"/>
Credentials	
<input type="checkbox"/> Use Default Credentials	Record Type
User <input type="text" value="user name"/>	<input checked="" type="radio"/> Create Lead
Password <input type="password" value="....."/>	<input type="radio"/> Create Contact
Domain <input type="text" value="CRM Domain"/>	<input type="radio"/> Create Account
	<input type="checkbox"/> Open MSCRM record window
<input type="button" value="Test Connection"/>	<input type="button" value="Advanced"/>
<input type="button" value="Import"/>	

6. Select the record type for import by pressing the radio buttons, Insert your MS CRM credentials and check the box below in case you want the wizard to show you the record after it was created. When finished, press the **Import** button. For MSCR 4.0, the Root Organization name is required in the 'Organization' box.



7. Congratulations! You have successfully imported the business card information into MS CRM.



Advanced Features: using the advanced settings screen you can define duplicate detection and mapping rules.

