



# CardScan™

## CardScan 2.11 for Windows

On-line Documentation

Click on the title of the document you want to view:

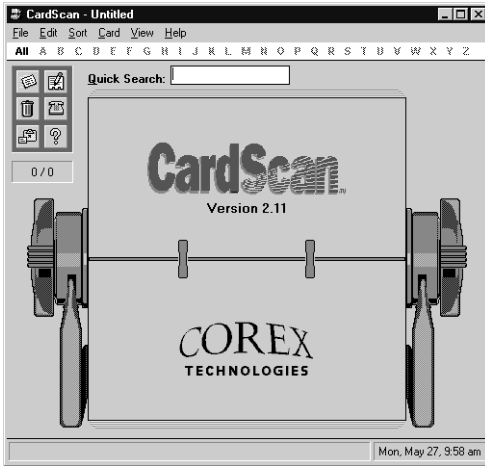
- Quick Reference Card
- User's Guide
- Upgrading Information

### SE Version for Windows and Macintosh

## Welcome

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

- Scan cards one right after another.
- View, edit, and enter notes for each card.
- Print contact lists and mailing labels.
- Export and import contact information.
- Copy information like names and addresses to word processing documents or other files.



## Scanning cards

You must scan and process your business cards before you can work with them in CardScan. See your *Scanner Setup and Operation* card or the CardScan on-line Help file for information on scanning and processing cards.

## Editing cards

When CardScan has finished processing cards, you see the Edit view for the first card.

Use the Edit view to make any necessary changes to the card information, then click **Verified** to indicate that the card has been checked for accuracy.

Click the heading to select the whole entry.

### Smart Zoom

Click any text to zoom in on that text on the card image.



Click here to see all hidden text for the card.

### Verifying Card Information

Click the **Verified** box when you are satisfied that the information is correct.

Click here to see hidden text in a field.

### Editing commands

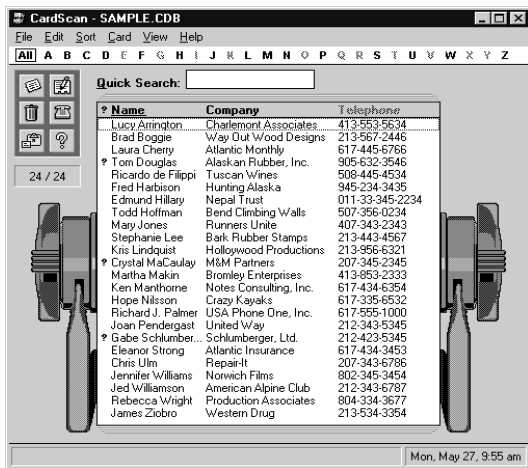
CardScan uses standard Windows and Macintosh editing commands. Below are some ways to change information:

To	Do this
<b>Insert text</b>	Place the cursor where you want to insert text, and type the text you want to add.
<b>Replace text</b>	Select the information you want to replace, and type the new text over it.
<b>Copy/cut or paste text</b>	Select text, and use the standard <b>Cut</b> , <b>Copy</b> and <b>Paste</b> commands.
<b>Delete text</b>	Use the Delete or Backspace key, or the <b>Clear</b> command.
<b>Undo an edit</b>	Use the <b>Undo</b> command to reverse the last editing task you performed.

## Viewing all cards

Click **All** to view a list of all cards in your CardScan address file.

### List view



### Sorting

To sort the list by name or company, click the heading you want to sort by.

### Searching

To search for information, click in the QuickSearch box then start typing. As you type, CardScan starts locating cards that match the search text.

The List view is the master list of all the cards in a CardScan address file. When you start CardScan manually, the List view is displayed.

## Viewing card details

To view or edit a card from the List view, double-click the card you want to view.



### Edit view

Use this view to edit information on the card.

### Image view

Click the left mouse button to zoom in on part of the card.

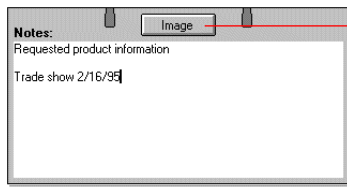
Click the right mouse button to return to the normal Image view.

### Summary view

Select **Summary** from the View menu to see card details in a compact format.

## Adding notes to a card

1. Click the **Notes** button from the Image view.



Click here to return to the Image view.

### Searching Notes

You can use CardScan's QuickSearch feature to find all cards with a specific note.

2. Type the note.
3. Click **Image** to return to the Image view.

## Adding cards without scanning

Use this option to add data for a new card manually, rather than by scanning a card.

1. Choose **New** from the Card menu, or click the **New Card** icon.
2. Type the information for the new card.



## Deleting cards

1. From the List view, select the card or cards you want to delete.
2. Choose **Delete** from the Card menu, or click the **Delete** icon.
3. Click **OK**.



CardScan deletes all card information as well as the image for the selected card(s).

You can also choose **Delete** while viewing a specific card to delete that card.

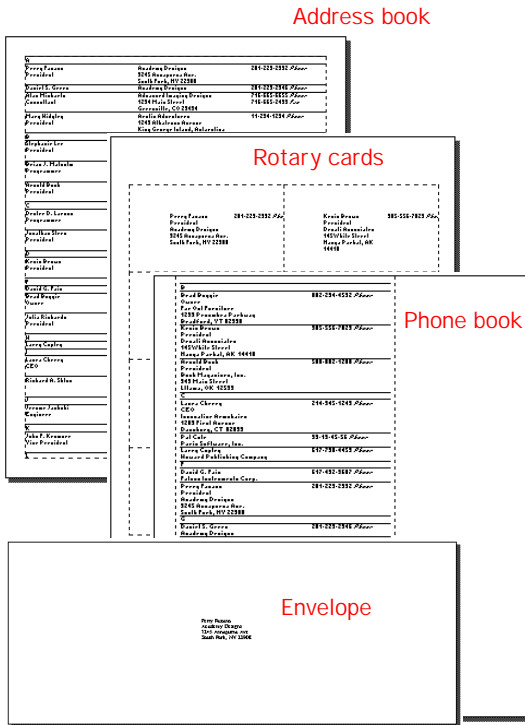
## Saving your address file

If you are working with a new address file, you will need to give it a name when you exit CardScan.

1. **Windows:** After you have finished working with a file, choose **Exit** from the File menu.  
**Macintosh:** After you have finished working with a file, choose **Quit** from the File menu.
2. If you are working on a new CardScan file, click **Save**, and type a name for the file.
3. Click **OK**.

## Formatting and printing

You can print all the cards or a selection of cards in a number of formats, including address books, telephone books, and address labels.

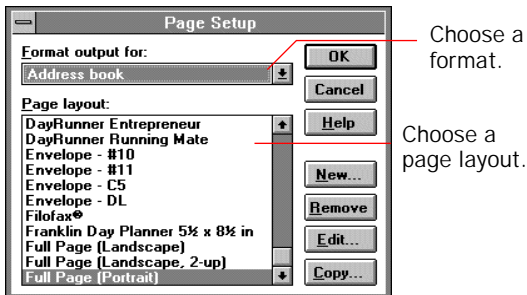


## Printing card information

Before printing, choose the format and page layout you want to use.

- If you are using Windows, choose **Page Setup** from the File menu.

If you are using a Mac, choose **Print Layout** from the File menu.



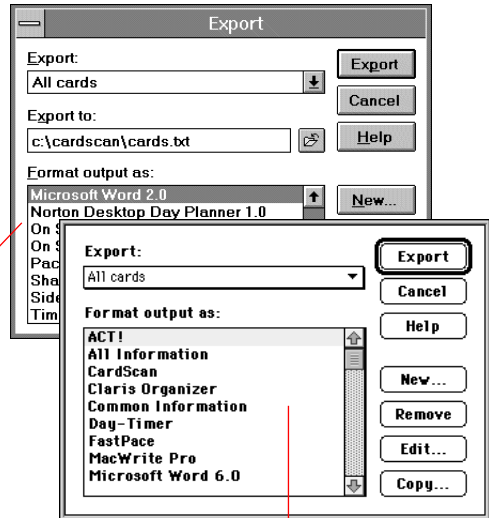
- Choose one of the formats and one of the page layouts, then click **OK**.

- Choose **Preview** from the File menu to check the appearance of the page before you print.

## Exporting card information

Use these steps to export card information to an application for which an export template exists.

- Open the CardScan address file you want to export from. If you want to export only a few cards, select them in the List view.
- Choose **Export** from the File menu.



Windows export templates are listed here.

Macintosh templates are listed here.

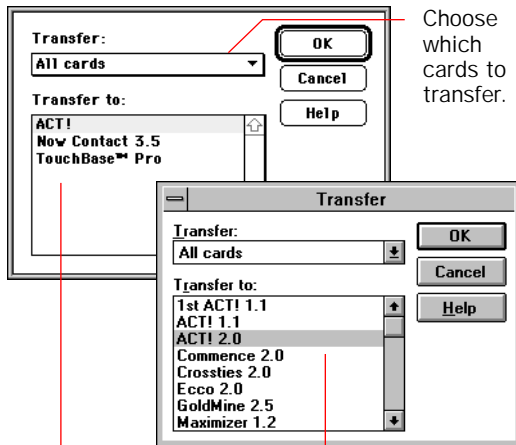
- Choose:
  - All cards** to export the entire address file.
  - All cards in list** to export just the cards currently showing in the List view.
  - Selected cards** to export just cards currently highlighted in the List view.
- If you are using Windows type a name for the text file.
- Choose the template you want to use, and click **Export**.
- If you are using a Macintosh, enter a name for the text file and click **Save**. CardScan writes the data to the text file.
- Open the other application and follow the instructions in its documentation to import the text file.

## Transferring cards to a contact manager

(available with the full version of CardScan)

You can copy information from CardScan to any supported contact manager. (See the *CardScan User's Guide*, on-line Help, or your ReadMe file for a list of supported contact managers.)

1. Start the contact manager, and open the file to which you want to transfer the cards.
2. If you want to transfer specific cards, highlight the cards in CardScan's List view.
3. Choose **Transfer** from the File menu. You see the Transfer dialog box.



Mac contact managers are listed here.

Windows contact managers are listed here.

4. Choose:
  - All cards** to transfer the entire address file.
  - All cards in list** to transfer just the cards currently showing in the List view.
  - Selected cards** to transfer just the cards currently highlighted in the List view.
5. Select the contact manager application you want to transfer cards to.
6. Click **OK**.

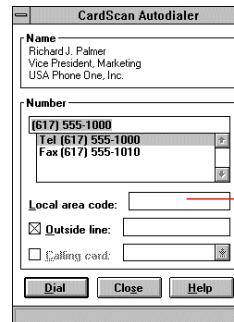
## Dialing

(available with the full version of CardScan)

If you have a Hayes-compatible modem, you can use CardScan to dial telephone numbers.



1. Click the Dial icon, or choose **Dial** from the Card menu.



If you need to dial a prefix (for example, 9) to get an outside line, click the **Outside line** box, and type the prefix.

Enter the local area code so that CardScan skips the area code for local calls.

2. Choose the number from the list, or type the number you want to dial.
3. Click **Dial** to make the call. The Dial button changes to Hangup.
4. When the other party answers the phone, lift your handset, then click **Hangup** to disconnect the modem.

## For more information

Refer to these other sources for more information on using CardScan:

### The CardScan User's Guide

This book contains a complete description of CardScan and how to use it.

### Scanner Setup and Operation card

This fold-out card provides instructions on how to set up and use your scanner.

### On-line Help

CardScan includes complete on-line Help with instructions for using the software and your scanner.







Click the **Help** icon or choose **Contents** from the Help menu to see a list of Help topics.

### ReadMe File




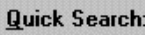



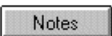

The most up-to-date information about CardScan, including lists of supported contact managers and known bugs, is contained in this file.

# CardScan Tools and Shortcuts

## Tools

	To	Do This
	Scan a card.	Click the <b>Scan</b> icon.
	Create a new card by typing rather than scanning.	Click the <b>New Card</b> icon.
	Delete a selected card.	Click the <b>Delete</b> icon.
	Dial a phone number.*	Click the <b>Dial</b> icon.
	Copy a card to the clipboard for use in another application.*	Click the <b>QuickCopy</b> icon.
	Use CardScan's Help.	Click the <b>Help</b> icon.

## Shortcuts

	To	Do This
	Display the entire list.	Click <b>All</b> .
	Switch to the List view from the current card view.	Press <b>Esc</b> or click in the QuickSearch box.
	Sort the list by name, company, or whether verified.	Click the column heading you want to sort by.
	View cards starting with a certain letter.	Click a letter on the alphabet bar.
	Find cards with specific text.	Type the text in the QuickSearch box.
	Page through the cards one at a time.	Click the up or down arrows or press the Page Up or Page Down keys.
	See all hidden text (text that does not fit on a single line) in the Edit view.	Click the <b>All Hidden Text</b> indicator.
	See hidden text for an entry in the Edit view.	Click the <b>Hidden Text</b> indicator.
	Switch to Notes view for a card from image view.	Click the <b>Notes</b> button.
	Switch to image view of a card from the Notes view.	Click the <b>Image</b> button.

\* Available with the full version of CardScan.



# Windows User's Guide

CardScan 2.11

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# Introducing CardScan

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

- View, search, sort, and edit card information, and enter notes for each card.
- Transfer cards directly to contact managers like ACT!, ECCO, and Maximizer.
- Copy card information like names and addresses to word processing documents or other files.
- Export your address list for use with other software.
- Dial telephone numbers.
- Print address books and mailing labels.

## How does CardScan work?

To process business cards, CardScan saves the scanned image of the card and uses its built-in Optical Character Recognition (OCR) software to translate the image to text. It then organizes the text into *fields* such as name, title, company, and phone number and saves this information as an address list that you can view, sort, and search using the QuickSearch feature. You can also edit individual cards, and print address lists and labels.

CardScan makes it easy for you to use the card information with other applications. It uses Dynamic Data Exchange (DDE – a Windows protocol for exchanging information) to allow you to use CardScan directly with many contact managers. CardScan also provides import/export facilities, and extended clipboard support to allow you to transfer card information to almost any application.

## Working with other applications

CardScan provides the following capabilities for working with other applications.

- **The CardScan Toolbox**  
Lets you scan and view cards directly from within many contact managers.
- **CardScan's predefined import/export templates**  
Make it easy to exchange address list information with other supported applications.

**Note:** CardScan is continually adding to its list of supported applications. Appendix B lists the programs supported in this version.

- **CardScan's Import and Export commands**  
Let you create your own templates for exchanging address list information with any application that can work with an ASCII text file.
- **CardScan's extended clipboard support**  
Lets you copy card information to the clipboard, and paste it into word processing documents or other files.

## Learning more about CardScan

After following the steps on page 3 to install CardScan, you can learn more about using it in the following ways.

**Note:** To find out how to get technical support, see your *Quick Reference* card.

**Note:** If you received CardScan with a scanner, you also received a *Quick Reference* card for that scanner. Otherwise, you received a *Scanner Setup* booklet.

- **To get started right away:**  
Try the *Quick Start Tutorial* beginning on page 6 for a brief lesson on how to scan cards and how to work with the address list.
- **To see more about CardScan before you start:**  
Read the *Overview* that starts on page 8, then follow the steps on page 11 to start scanning cards.
- **To find out how to use CardScan with your scanner:**  
Read the *Quick Reference* card or your *Scanner Setup* booklet, then follow the steps on page 11.
- **To see an on-line description of CardScan's features:**  
Double-click the CardScan Tour icon in the CardScan program group.
- **To use on-line Help:**  
Press F1, or choose **Contents** from the Help menu to see a list of Help topics.

# Installing CardScan

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Follow the steps on this page to install CardScan, then read the *Overview* that starts on page 8, or go through the *Quick Start Tutorial* beginning on page 6 for an introduction to CardScan's features.

## Before you begin

Before you install CardScan, check to see that you have the required hardware and software, and that your scanner is properly installed.

### Check system requirements

- An 80386 PC or higher
- Windows 3.1 or higher
- 8 megabytes of RAM
- 5 megabytes of free hard disk space
- A Hayes-compatible modem, if you want to use CardScan's Autodial feature

**Note:** To use CardScan's Autodial feature, you need a Hayes-compatible modem.

### Set up your scanner

Before you install CardScan, your scanner must be connected to your computer. Read the *CardScan Read Me* file and the *CardScan Scanner Setup* booklet or your *Quick Reference* card for information about setting up and using your scanner with CardScan.

## To install CardScan

Follow these steps to install CardScan.

1. Start Windows and insert CardScan Disk 1.
2. From the Program Manager, choose **Run** from the File menu.
3. Type **a:setup** and click **OK**.

The setup program displays a welcome screen, then a registration screen.

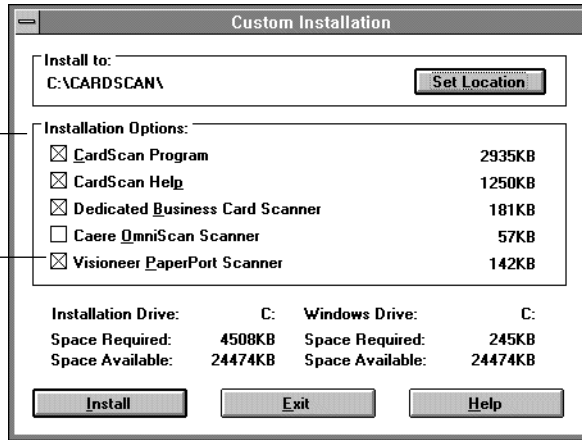
4. Fill in the registration screen with your name and your company name, then click **Continue**.

**Note:** If you are using the B drive, type b:setup.

You see the Installation Options dialog box.

Select the options that apply to your scanner.

If you have a PaperPort scanner and this option is not on, exit Setup and check that the PaperPort software is properly installed and configured.



5. Select the options that apply to your configuration, then click **Install**.

### Installation Options

This table lists the files that are installed with each option.

Option	Installs these files
CardScan Program	CardScan program, libraries and supporting files. Includes everything needed to use CardScan with a TWAIN-compliant scanner.
CardScan Help	CardScan Help file. Turn off this option if you are an experienced CardScan user and wish to conserve disk space.
Dedicated Business Card Scanner	Files needed to use CardScan with a dedicated business card scanner. If you don't have a card scanner, turn off this option.
Caere Omniscan Scanner	Files needed to use CardScan with the OmniScan hand-held scanner from Caere Corporation. You must install the OmniScan hardware and software <i>before</i> you install CardScan.
Visioneer PaperPort Scanner	Files needed to use CardScan with the PaperPort scanner and software from Visioneer Communications Inc. You must install and configure the PaperPort software <i>before</i> you install CardScan.

**Note:** If you want to install additional files later, you can re-run Setup.

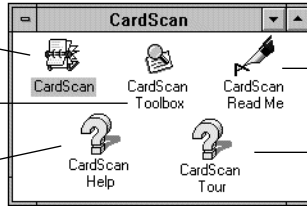
## The CardScan program group

A program group called CardScan is created with the CardScan application inside.

The CardScan program icon

The CardScan Toolbox icon

The CardScan Help file



The Read Me file has the most up-to-date information about CardScan.

The CardScan Tour gives you a quick overview of CardScan's features.

CardScan Toolbox



## The CardScan Toolbox

The CardScan Toolbox is a mini-program that provides an easy way to use CardScan from within other programs, such as ACT!, PackRat, and Commence. You can use the Toolbox to scan cards directly into supported contact managers, and to display cards from within another program.

## Starting CardScan

To start CardScan, double-click the **CardScan** icon.

The first time you start CardScan, you see this CardScan window.

### *CardScan Tools*

#### **Scan**

Start scanning cards.

#### **New Card**

Create a card by typing rather than by scanning.

#### **Delete**

Delete a card.

#### **Dial**

Dial a number on the card.

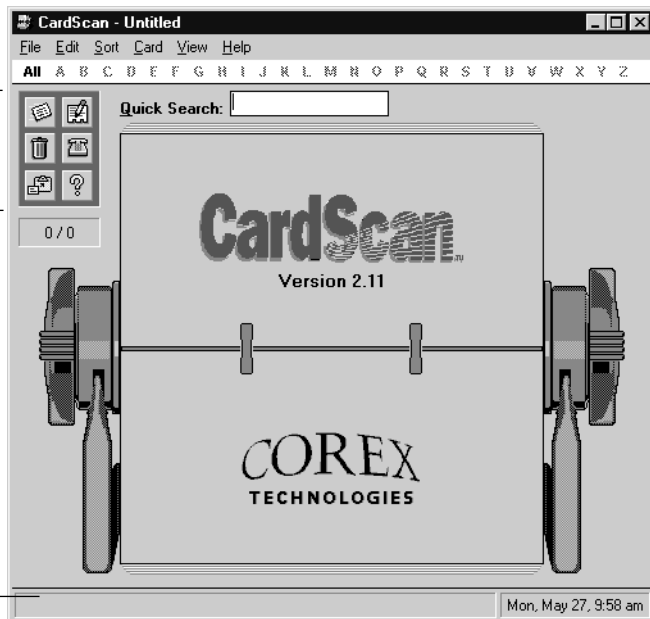
#### **Copy to Clipboard**

Copy card information to the clipboard for use in other software.

#### **Help**

Use CardScan's Help.

Look here for helpful information while you are using CardScan.



# Quick Start Tutorial

These two pages provide a brief introduction to the basics of scanning cards and creating a CardScan address list. You can start learning about CardScan here, then use the rest of the book to answer any questions you may have.

## 1. Get ready.

Collect the cards you want to scan. For this tutorial, start with 5 to 10 cards.

Make sure your scanner is connected to your computer, and that it is turned on.

Start CardScan.

## 2. Scan the cards.

Refer to the *Scanner Setup* booklet or *Quick Reference* card for detailed instructions on how to scan cards with your scanner. Follow these steps if you have a business card scanner.

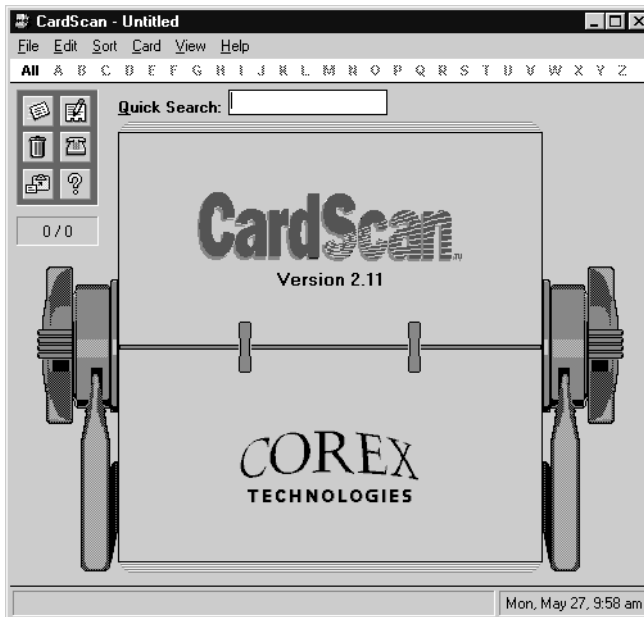
Position the card in the scanner. If you've configured CardScan to detect cards automatically, CardScan begins scanning immediately. Otherwise, click the **Scan** icon.

After the card has been scanned, you see a message prompting you to scan another card. Place the next card in the scanner.

Repeat for each card.

## 3. Process the cards.

When you have finished scanning cards, click **OK** or **No** to process the cards immediately.



### Processing the cards

Depending on how many cards you scanned, it takes from a few seconds to a few minutes to process the cards.

To process cards, CardScan reads information from the card images and organizes it into *fields* such as name, title, company, and phone number. In addition, CardScan saves an image of the card.

When CardScan has finished processing cards, you see the edit view of the first card you scanned.

#### 4. Edit and verify a card.

Check the information on the card, and edit any text you want to change.

Click the **Verified** box when you are satisfied that the information is correct.

You can defer verifying until you need to use the information, for example, to print.



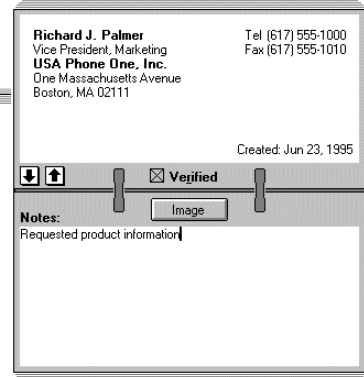
To change any of the information for a card, just type over the existing text. See page 14 for more information about editing cards.

#### 5. Add notes to a card.

Click the **Notes** button to add optional information to a card.

#### 6. Repeat for each card.

Click the up and down arrows, or use the Page Up and Page Down keys to move to the next card.



#### 7. View all the cards in the address list.

Click **All**.

#### 8. View or Edit the CardScan List.

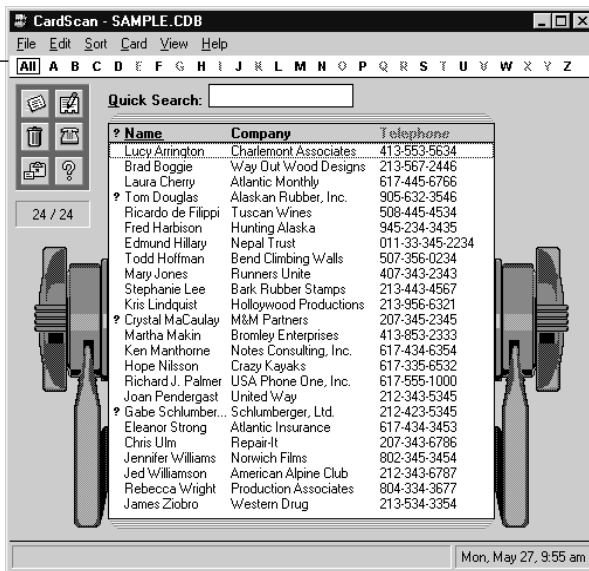
The question marks to the left of the names indicate that these cards have not been verified.

From the list view, double-click an entry to view or edit card information.

#### 9. Exit CardScan.

Choose **Exit** from the File menu. If CardScan prompts you to save your changes, type a name for the new address list file and click **Save**.

The next time you use CardScan, it will open this list.



What next?

Now that you've started your address list, feel free to experiment with CardScan's other powerful features like exporting and auto-dialing.

# Overview

To get familiar with CardScan's features, spend a few minutes looking through the next few pages. Then, when you start scanning cards to create your own address list, you will have a good idea of how to get the most out of CardScan.

CardScan has two views:

- The **list view** shows the name, company, and telephone number for all your cards.
- The **card view** is a detailed view of all the information on each card.

## The list view

The list view is the master list of cards in a CardScan database. As you scan cards, CardScan adds them to the master list. When you start CardScan, the list view is displayed.

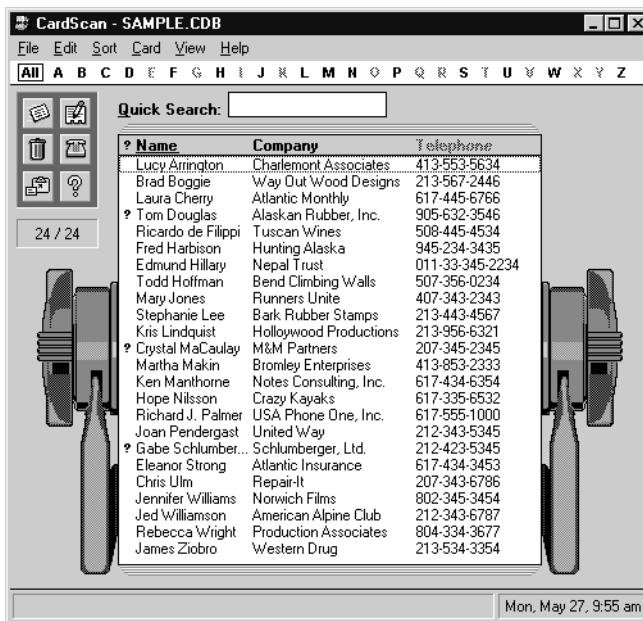
Click a letter to narrow the list to card entries starting with that letter. Click **All** to view all the cards in the address list.

### Searching

To search for any information from any card, click in the QuickSearch box, then start typing the text you want to search for. As you type, CardScan starts locating cards that match the search text.

### Sorting

To sort the list by name or company, click the heading you want to sort by. Click the ? column heading to sort the cards by date, with any unverified cards listed first.



## Viewing card details

To switch to the card view, in which you can view or edit a card, double-click the card you want to view.

# The card view

The card view provides several ways to view card details.

## Edit view

Click the right mouse button anywhere on the card summary to see the edit view. Use this view to edit the information on the card.

To page through the cards, click the up and down arrows.

## Smart zoom

When you click any text in the edit view, CardScan zooms in on that text on the card image.



To view all hidden text, click here.

## Image view

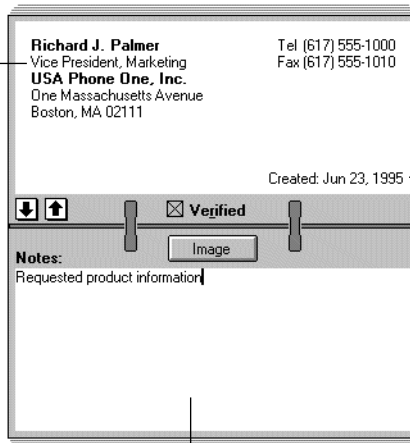
When you scan a card, CardScan saves an image of the card.

Click the left mouse button to zoom in for a closer view of any part of the card.

Click the right mouse button to return to the normal image view.

## Summary view

This view displays the information from the card in a summary format. It also includes the date the card was created or last modified.



CardScan records the date the card was created or last modified.

## Notes view










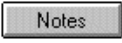

To add information for a card, click the Notes button and type any additional information.

Notes provide an easy way for you to add information for categorizing cards that you may want to search for as a group.

Click the Image button to return to the image view of the card.

# CardScan tools and shortcuts

The table below shows CardScan's tools and shortcuts.

		To	Do This
Tools		Scan a card.	Click the Scan icon (or press CTRL-S).
		Delete a selected card.	Click the Delete icon (or press CTRL-Delete).
		Dial a phone number.	Click the Dial icon (or press CTRL-D).
		Create a new card by typing rather than scanning.	Click the New Card icon (or press CTRL-Insert).
		Use CardScan's Help.	Click the Help icon (or press F1).
		Copy a card to the clipboard for use in another application.	Click the QuickCopy icon.
		To	Do This
Shortcuts	<b>All</b>	Display the entire list.	Click All.
	<b>Name</b>	Sort the list by name, company, or whether verified.	Click the column heading you want to sort by.
	<b>A B &lt; &gt;</b>	View cards starting with a certain letter.	Click a letter on the alphabet bar.
	<b>Quick Search:</b>	Find cards with specific text.	Type the text in the QuickSearch box.
		Page through the cards one at a time.	Click the up or down arrows or press the Page Up or Page Down keys.
		See all hidden text (text that does not fit on a single line) in the edit view.	Click the All Hidden Text indicator.
		See hidden text for an entry in the edit view.	Click the Hidden Text indicator.
		Switch to notes view for a card from image view.	Click the Notes button (or press CTRL-N).
		Switch to image view of a card from notes view.	Click the Image button (or press CTRL-I).

# Scanning Cards

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**Note:** With CardScan you can scan cards one right after another. With many scanners, you can scan up to eight cards at a time using CardScan's scanning template.

If you have spent a few minutes getting familiar with how CardScan works, you are now ready to start scanning in business cards to create your own address list.

CardScan operates with many different types of scanners. Follow the instructions for the type of scanner you are using.

## To scan cards with a business card scanner

Follow these instructions if you are using a business card scanner connected to the parallel port, and the Detect Cards Automatically option in Scan Preferences is clicked on.

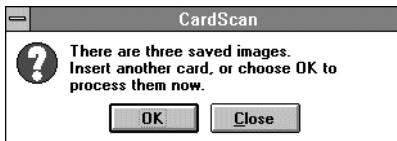
1. Make sure your scanner is installed and turned on.
2. Start CardScan.
3. Position the business card properly for your scanner.

If you're not sure how to use your scanner or how to position a card, read your *Quick Reference* card.

4. CardScan automatically detects the card and starts scanning.

You can scan cards continuously, feeding them one after another into the scanner. As CardScan finishes scanning a card, you see a message similar to the following:

Click **Close** to stop scanning cards and save the scanned image(s). You can process the cards later by choosing **Process Cards** from the Card menu.



5. To scan another card, place the card in the scanner.
6. Repeat for all the cards you want to scan.
7. When you have finished scanning cards, click **OK** to begin processing the cards you scanned immediately.

Click **Close** to delay processing the cards until a later time.

## To scan cards with a Visioneer PaperPort scanner

Follow these instructions only if you are using CardScan with a PaperPort scanner.

1. Make sure your scanner is installed and plugged in.
2. Insert the business card face up into the scanner.  
If you're not sure how to use your scanner or how to position a card, read your *Quick Reference* card.
3. The scanner will detect the card automatically, scan it, and display an image of the card in the PaperPort window.
4. To scan another card, place the card in the scanner. Repeat for all the cards you want to scan.
5. Drag the card image(s) to the CardScan icon at the bottom of the PaperPort window or choose **Send** from the File menu. In the Send dialog box, choose the CardScan link and click **OK**. PaperPort sends the image(s) to CardScan and CardScan begins processing the cards immediately.

**Note:** Each business card must be scanned as a separate document.



## To scan cards with any other scanner

Follow these instructions to scan business cards with any scanner other than a business card scanner or a Visioneer PaperPort, or if the Detect Cards Automatically option in Scan Preferences is turned off.

1. Make sure your scanner is installed and turned on.
2. Start CardScan.
3. Position the business card properly for your scanner.  
If you're not sure how to use your scanner or how to position a card, read the *CardScan Read Me* file and the *Quick Reference* card or the section about your scanner in the *Scanner Setup* booklet.
4. Click the **Scan** icon or choose **Scan** from the Card menu (**Ctrl-S**). CardScan starts scanning the card.

Depending on the scanner you are using, you can scan one or more cards at a time.

As CardScan finishes scanning a card, you see a message similar to the following:



5. To scan another card, place the card in the scanner and click **Yes**.



**Note:** For instructions specific to your scanner, refer to the *Quick Reference* card or the *Scanner Setup* booklet.

6. Repeat for all the cards you want to scan.
7. When you have finished scanning cards, click **No** to begin processing the cards you scanned immediately.

## Processing cards

Depending on how many cards you scanned, it takes from a few seconds to a few minutes to process the cards. When processing cards, CardScan reads information from the card images and organizes it into fields such as name, title, company, and phone number. In addition, CardScan saves an image of each card.

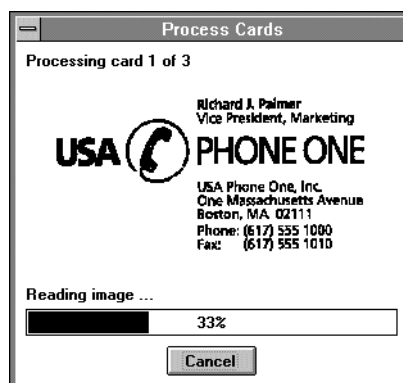
As CardScan processes the cards, it shows:

Which card is being processed

How many cards remain to be processed

An image of the card being processed

Which step CardScan is currently executing



You can stop processing at any time. Click **Cancel** to stop processing cards and save the scanned image(s) of cards that are not yet processed. You can process the cards later by choosing **Process Cards** from the Card menu.

After processing the cards, CardScan displays the edit view of the first card you scanned. You can edit and verify the cards right away, or you can do it later.

### About optical character recognition

To process cards, CardScan uses Optical Character Recognition (OCR) software to read information from the cards and organize it into *fields*, such as name, title, company, and phone number.

Because OCR technology is not perfect, it is not unusual to find several small errors on a card. Usually the errors occur in reading non-text information like logos and other graphics.

If you see a lot of errors for a card, try scanning it again. You may have positioned the card incorrectly in the scanner, or there may have been mechanical difficulties with the scanner on the first try.

# Editing Cards

After processing cards, CardScan displays the edit view. You can use the edit view to change any information on the card.

Click the heading to select the whole entry.

Click here to change the phone number label.

Name	Richard J. Palmer
Title	Vice President, Marketing
Company	USA Phone One, Inc.
Address	One Massachusetts Avenue Boston, MA 02111
Phone	(617) 555-1000
Fax	(617) 555-1010
Other	USA

↓ ↑     Verified    ↓

This symbol indicates hidden information.

Click it to see the hidden information in that field.

Click here to see all hidden text for the card.

## Smart Zoom

Click any text in the edit view to zoom in on that text on the card image.

**Note:** As you work, CardScan automatically saves any changes you make.

## Changing text in the edit view

CardScan uses standard Windows editing commands. Below are some ways to change information:

To	Do this
<b>Insert text</b>	Place the cursor where you want to insert text, and type the text you want to add.
<b>Replace text</b>	Select the information you want to replace, and type the new text over it.
<b>Copy/cut or paste text</b>	Select text, and use the Windows Cut, Copy and Paste commands (Ctrl-X, Ctrl-C, or Ctrl-V).
<b>Delete text</b>	Use the Delete or Backspace key, or the Clear command.
<b>Undo an edit</b>	Use Undo to reverse the last editing task you performed (Ctrl-Z).

## Drag and drop editing

You can use drag and drop editing to move text.

1. Use the mouse to highlight the text you want to move.
2. Hold the mouse button down while you drag the highlighted text to the new location, then release the mouse button.

CardScan saves phone labels you type so that you can select them from this list.

Phone	617-345-2365
Fax	Cal
	Home

### Changing a phone label

1. Click the label to the left of the phone number.
2. Type the new label or click on the drop-down arrow and choose a label from the list that appears.
3. If you type in a new label, CardScan automatically adds it to the list for you to use again.

### Changing text to mixed upper and lower case

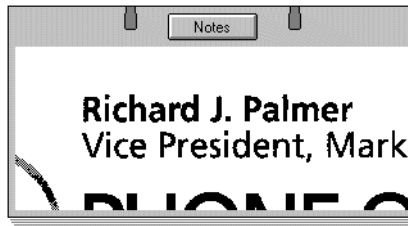
Often, text on business cards appears in all uppercase letters. You can change the text so that the first letter of each word is uppercase.

1. Select the text you want to change.
2. Choose **Change Case** from the Edit menu, or press **Ctrl-A**.

### Getting a closer view of the card image

You can zoom in on part of the image to see the information more clearly. There are several ways to zoom in:

When you move from one field to the next, CardScan automatically zooms in on the part of the image that text came from.



To move the image, click the left mouse button until you can see the part of the card you want to view.

- Click the left mouse button when the magnifying glass cursor is over the card image.
- Double-click a word in the edit view to zoom in on that area in the image view.
- If your computer monitor is large enough, you can choose **Big Picture** from the View menu to see the whole card image in a larger window.

**Note:** Click the Verified box when you have checked the information from the card.

### Verifying card information

When you have checked the card to make sure the information is correct, click the **Verified** checkbox to indicate that the card has been checked for accuracy. Cards that have not been verified are shown with a question mark in the list view.

When a card is unverified, CardScan does the following to make it easy for you to check and correct card information:

- Automatically displays the edit view with all fields open and all text not hidden.
- Automatically zooms the image when you move from one field to the next.
- Warns you when you try to dial, print, or export unverified card information.

## Using Notes

CardScan provides the notes view as a free-form area for you to keep any additional information you want to include with a card. This is especially useful for categorizing your cards.

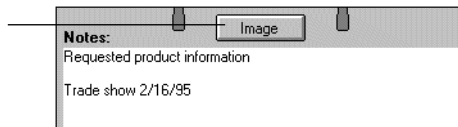
You can use the notes view to add a unique identifier to a card so that you can easily locate the card. For example, if your friend David is called Didi, you could find his card simply by typing *didi* in the QuickSearch box.

### To add notes to a card

1. Click the **Notes** button from the image view.

You see the notes view.

Click the **Image** button to return to the image view.



### Searching Notes

You can use CardScan's QuickSearch feature to find all cards with a specific note.

2. Type the note.
3. Click the **Image** button to return to the image view.

### Using notes to categorize card information

Notes provide an easy way to categorize cards. If you add the same note to a group of cards, you can use CardScan's QuickSearch feature to create a list of just those cards.

For example, you could add the note, *Trade show 1/11/93* to indicate all cards you collected at a trade show, or *Requested product information* to indicate all cards for a mailing. To find all cards with that note, start typing the note text in the QuickSearch box. CardScan will narrow the list to just those cards with text that matches the search text.

Hint: To quickly add the same note to several cards, type the note on the first card. Select the text and copy it to the clipboard with the Copy command. Paste the text into the notes view of the remaining cards.

# Adding and Deleting Cards

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In addition to the Scan command, CardScan provides the following options for working with cards in an address list.

- New Card
- Delete Card
- Delete Image
- Delete All Images

## Adding cards without scanning

Use this option to add data for a new card manually, rather than by scanning a card.

### To type a card entry

1. Choose **New** from the Card menu, or click the **New Card** icon, or type **Ctrl-Insert**.

You see a new, blank card.

2. Type the information for the new card.



**Note:** You can also choose Delete while viewing a specific card to delete that card.

## Deleting cards

You can delete all information, including the card image, for any card in the CardScan database.

### To delete cards

1. From the list view, select the card or cards you want to delete.
2. Choose **Delete** from the Card menu, or click the **Delete** icon, or type **Ctrl-Delete**.
3. Click **OK**.

CardScan deletes all card information as well as the image for the selected card(s).



**Note:** There is no way to recover a deleted card image except by scanning the card again.

## Deleting card images

The card images are saved in CardScan along with textual information. These images can be relatively large, and may take up more disk space than you want to use. Once you have scanned and verified a card, there is usually no need to keep the card image. By deleting the card images, you can save a substantial amount of disk space.

You can delete selected images, or you can delete all images in your address list.

### To delete the image for a card

1. Double-click the card in the list view to display the card image.
2. Choose **Delete Image** from the Card menu.
3. Click **Yes** to delete the card.

### To delete all the images in an address list

1. Choose **Delete All Images** from the Card menu.
2. Click **Yes** to delete all the images in the current address list.

# Searching

You can use CardScan's QuickSearch feature to find any information on any card with just a few keystrokes.

## To search for information

Shortcut: Press the Esc key to move the cursor to the QuickSearch box.

Click in the **QuickSearch** text box or press the Esc key, and start typing the text you want to locate.

As you type, CardScan locates cards that include the search text and updates the list view.

For example, if you type *la*, CardScan finds all cards with words that contain those characters (*Alan*, *Larsen*, *Larry*, *Land*, *Kalan*, and *Kaplan*).

CardScan narrows the list view to cards that contain a match to the search text.

Quick Search:

? Name	Company	Telephone
Alan Michaels	Advanced Imaging De...	716-665-6655
Dexter D. Larson	CompuSoft Systems	408-445-6793
Larry Copley	Howard Publishing Co...	617-738-4459
Ian Johnson	Land, Smith & Moses	212-344-8700
Karen N. Peters	Land, Smith & Moses	212-344-5634
Jean Kalan	Oriad Pictures	305-254-6784
George Kaplan	Perception, Inc.	

As you continue to type, CardScan narrows the selections further.

Quick Search:

? Name	Company	Telephone
Dexter D. Larson	CompuSoft Systems	408-445-6793
Larry Copley	Howard Publishing Co...	617-738-4459

CardScan finds any cards with the search text, even if the text is not visible in the list view. For example, if a note includes the search text, CardScan will find the card with that note.

Quick Search:

Hint: If you have unverified cards, some entries might contain errors. If you can't locate a card by searching for text that should be on the card, try typing a slightly different set of characters, or sorting by unverified cards.

Image

Notes:
Requested product information
Trade show 2/16/95

# Sorting

You can sort the entries displayed in the list view by last name, company, or whether the card is verified.

## To sort the list by name or company

Click the heading you want to sort by or select **By Name** or **By Company** from the Sort menu. CardScan sorts the list in alphabetical order by the heading you chose.

The current sort option is shown with a check in the Sort menu.

The heading for the currently sorted column is underlined.

This list is sorted by name. Notice that, although names are sorted by last name, the first name always appears first.

<u>? Name</u>	Company	Telephone
? Kevin Brown	Denali Associates	305-556-7823
? Arnold Buck	Buck Magazines, Inc.	508-882-1200
Pat Cole	Paris Software, Inc.	33-13-45-56
Larry Copley	Howard Publishing Co...	
David G. Fain	Falcon Instruments Corp.	
? Perry Fossati	Academy Designs	
Daniel S. Green	Academy Designs	
Jerome Jackobi	JSC International	
Ian Johnson	Land, Smith & Moses	
? Gilbert Juliano	New York Builders Ass...	
Jean Kalan	Oriad Pictures	
George Kaplan	Perception, Inc.	
John F. Kenmore	Kenmore Associates	
Dexter D. Larson	CompuSoft Systems	
? Brian J. Malcolm	Braintree Software, Inc.	
Alan Michaels	Advanced Imaging De...	
Richard J. Palmer	USA Phone One, Inc.	
Karen N. Peters	Land, Smith & Moses	
Julia Richards	Founders Industries	
Israel A. Shalom	Middle East Observer	
Richard A. Shlon	International Vision Corp	
Jonathan Stern	Corex Technologies	
? Wendy Tetrault	Personal Liferrafts, Inc.	
Daphne Waldo	The Fantasy Group	

This list is sorted by company.

<u>? Name</u>	Company	Telephone
? Perry Fossati	Academy Designs	201-223-2332
Daniel S. Green	Academy Designs	201-223-2346
Alan Michaels	Advanced Imaging De...	716-665-6655
? Brian J. Malcolm	Braintree Software, Inc.	716-665-6655
? Arnold Buck	Buck Magazines, Inc.	508-882-1200
Dexter D. Larson	CompuSoft Systems	408-445-6793
Jonathan Stern	Corex Technologies	617-277-5344
? Kevin Brown	Denali Associates	305-556-7823
David G. Fain	Falcon Instruments Corp.	617-432-9687
Julia Richards	Founders Industries	617-754-9823
Larry Copley	Howard Publishing Co...	617-738-4459
Richard A. Shlon	International Vision Corp	415-521-0990
Jerome Jackobi	JSC International	413-665-8765
John F. Kenmore	Kenmore Associates	202-554-6300
Ian Johnson	Land, Smith & Moses	212-344-8700
Karen N. Peters	Land, Smith & Moses	212-344-5634
Israel A. Shalom	Middle East Observer	202-230-5467
? Gilbert Juliano	New York Builders Ass...	212-765-8998
Jean Kalan	Oriad Pictures	305-254-6784
Pat Cole	Paris Software, Inc.	33-13-45-56
George Kaplan	Perception, Inc.	708-574-2235
? Wendy Tetrault	Personal Liferrafts, Inc.	802-222-3467
Daphne Waldo	The Fantasy Group	617-254-7732
James D. Warner	The Warner Group	408-345-2233

## To sort by unverified cards

To see all unverified cards, click the question mark, or choose **By Verified** from the Sort menu. CardScan moves the unverified cards to the top of the list and sorts all cards by date with the most recently edited cards first.

Click the ? column heading to put all unverified cards at the top of the list, sorted by date.

<u>? Name</u>	Company	Telephone
? Perry Fossati	Academy Designs	201-223-2332
? Wendy Tetrault	Personal Liferrafts, Inc.	802-222-3467
? Kevin Brown	Denali Associates	305-556-7823
? Arnold Buck	Buck Magazines, Inc.	508-882-1200
? Gilbert Juliano	New York Builders Ass...	212-765-8998
Ian Johnson	Land, Smith & Moses	212-344-8700
Julia Richards	Founders Industries	617-754-9823

# Managing Address Lists

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You can use CardScan's file management commands to create and work with several different address lists. For example, you may want one list for personal use and another for business use, or you may want to have different lists for different products or services. You can also use the clipboard to perform many tasks like duplicating cards, and merging or splitting CardScan files.

**Note:** When you exit after creating a new list, CardScan prompts you for a file name. Afterwards, CardScan saves your work automatically.

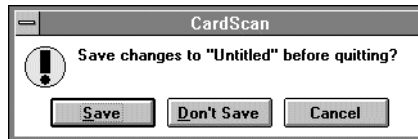
CardScan saves the address list as a card database with the suffix *.cdb*.

## Saving your address list

If you are working with a new CardScan address list, you will need to give it a name when you exit CardScan.

1. After you have finished working with a list, choose **Exit** from the File menu.

If you are working on a new CardScan list, you see this message when you exit CardScan.



2. Click **Save**, and type a name for the list file. Include the suffix *.cdb*.
3. Click **OK**.

## Creating a new address list

You may want to have several CardScan address lists. For example, you may want to keep the cards from a specific mailing separate from other cards.

1. Choose **New** from the File menu.

CardScan opens a new empty address list called "Untitled."

2. Scan and process cards for this new address list. When you quit CardScan, a message asks if you want to save changes.
3. Click **Save**.
4. Type a name for the list, and click **OK**.

CardScan saves the list as a database with the suffix *.cdb*.

### Opening a different address list

CardScan always opens with the last address list you used. However, if you have more than one address list, you can open a different one.

1. Choose **Open** from the File menu.
2. Choose the address list you want to use
3. Click **OK**.

CardScan lists the last four address lists you used at the bottom of the File menu so that you can easily switch among them as you work.

### Saving an address list with a new name

Use the **Save As** command to save an address list with a new name, for example, to use an existing list as a basis for a new address list.

1. Select **Save As** from the **File** menu.
2. Type the new name for your list. Include the suffix *.cdb*.
3. Click **OK**. CardScan saves the address list with the new file name.

### Merging two address lists

1. In the list view, select the cards you want to transfer to another CardScan list.
2. Click the **QuickCopy** button to copy the selected cards to the clipboard.
3. Open the second address list, and select **Paste** from the Edit menu to paste cards into the new list.



### Duplicating a card

Use these steps to create a duplicate card within CardScan.

1. Select the card you want to duplicate.
2. Click the **QuickCopy** button.
3. From either the list view or summary view, select **Paste** from the Edit menu to insert a copy of the card.

### Splitting a CardScan address list

1. In the list view, select the cards you want to move to another CardScan file.
2. Click the **QuickCopy** button.
3. Select **New** from the File menu to start a new file.
4. Select **Paste** from the Edit menu to insert the cards.
5. Use the **Save As** command to save the file with a new name.

### Finding duplicate cards

Do this to locate duplicate cards in your CardScan address list.

- Select **Find Duplicates** from the Card menu.  
CardScan searches its database and lists all cards containing duplicate names.

# Transferring Cards to a Contact Manager

**Note:** For the most up-to-date list of supported contact managers, see the CardScan Read Me file or the CardScan on-line Help.

If you use one of CardScan's supported contact managers, the easiest way to copy information from CardScan is to use the Transfer command. Supported applications are listed at the end of this chapter.

## To transfer card information

1. Start the contact manager and open the file or database to which you want to transfer the cards.
2. If you want to transfer specific cards, highlight the cards in CardScan's list view.

**Shortcut:** CardScan displays the Transfer icon for the contact manager in the upper-right corner of the CardScan window. Click the Transfer icon to transfer the highlighted card(s).

3. Choose **Transfer** from the File menu.

You see the Transfer dialog box.

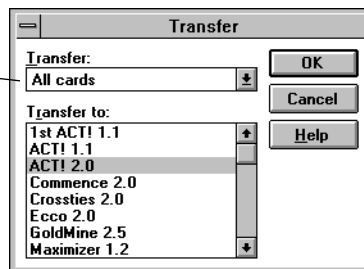


Choose:

**All cards** to transfer the entire database.

**All cards in list** to transfer just the cards currently showing in the list view.

**Selected cards** to transfer just the cards currently highlighted in the list view.



4. Choose what you want to transfer (all cards in the database, all cards displayed in the list view, or selected cards) and the application you want to transfer them to.
5. Click **OK**.

**Note:** For the most up-to-date list of supported contact managers, see the CardScan Read Me file or CardScan on-line Help.



Click here to display the Toolbox menu.



**Note:** If one of the supported contact managers is running, CardScan displays the Transfer icon for that application in the upper-right corner of the CardScan window.

## Using the CardScan Toolbox

CardScan's Toolbox makes it easy to use your address lists and card information in supported contact management programs such as ACT!, Commence, or PackRat. (See the following page for a list of supported contact managers.) With the Toolbox you can:

- Transfer address list information quickly and easily between CardScan and supported contact managers.
- Start scanning cards directly from a contact manager.
- View cards from within those applications.

### The CardScan Toolbox menu options

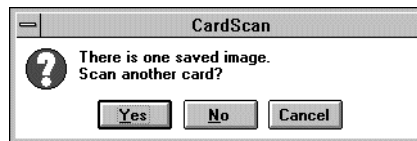
Using the drop-down menu, you can set the CardScan Toolbox to appear in two different ways:

- **Always on Top** keeps the CardScan Toolbox window on top of all other Windows programs.
- **Run at Startup** starts the CardScan Toolbox automatically each time you start Windows.

### To scan cards from within a contact manager

1. Position a card in your scanner.
2. Click the **Scan** icon in the CardScan Toolbox.

The CardScan Toolbox starts CardScan, and begins the scan. As CardScan finishes scanning the card, you see a message similar to the following:



3. To scan another card, place the card in the scanner and click **Yes**. When you are done scanning cards, click **No**. CardScan begins processing the cards immediately.
4. Check the first card to make sure the information is correct, then click the **Verified** checkbox.
5. Click the **Transfer** icon to send the card information to the selected application.
6. Repeat for each card you scanned.
7. After the last card is transferred, CardScan displays the cards in the list view.



## To view cards from within a contact manager

1. In the other application, select the contact whose card you want to view.
2. Click the **View** icon in the CardScan Toolbox.

CardScan starts, and searches the address list for the selected contact name. If CardScan finds one matching card, it displays the card in the card summary view. If it finds more than one matching card, it displays those cards in the list view. If CardScan finds no matching cards, it beeps once and displays all the cards in the list view.

## Supported contact managers

The contact managers supported by CardScan are listed below. You can transfer CardScan data directly to these applications without creating an export file.

**Note:** Check the CardScan Read Me file or CardScan on-line Help for the most up-to-date information about supported applications.

<b>Product</b>	<b>To view cards</b>
1st ACT!	Display the contact in the contact screen.
ACT!	Display the contact in the contact screen.
Advantage	You cannot view a card from Advantage.
Commence	Highlight the contact in the Address Book window.
Crossties	Display the contact in the contact screen.
ECCO	Select the contact in the Phonebook view form.
GoldMine	Display the contact in the contact screen.
Maximizer	Highlight the contact in the clients window.
METZ Phones	Display the contact in the contact screen.
On Schedule	Display the contact in the contact screen.
PackRat	You cannot view a card using PackRat.
Time & Chaos	You cannot view a card using Time & Chaos.

# Copying to Other Applications

CardScan makes it easy for you to quickly copy card information to the clipboard and paste it into a letter, fax, or other document.

## To use the clipboard to copy card information

1. Select the card(s) you want to copy, and click the **QuickCopy** icon. By default, CardScan copies the Name, Title, Company and Address fields to the clipboard.
2. Open the application you want to copy the card to.
3. Use the **Paste** command in the other application to insert the information.



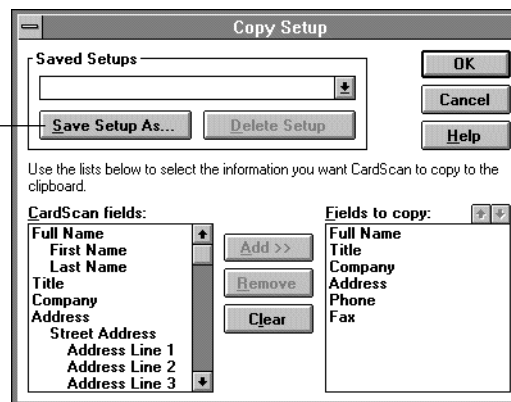
**Note:** Choose **Copy Setup** from the Edit menu to change which fields are copied to the clipboard.

## Changing the setup for copying to the clipboard

When you copy to the clipboard, by default CardScan copies the Name, Title, Company and Address fields. However, you can change the information that CardScan copies. For example, you could copy the name, company and fax number to make a fax cover page.

1. Choose **Copy Setup** from the Edit menu.

To assign a name to this setup so that you can use it in the future, choose **Save Setup As** and type a name for the setup.



2. Choose the fields you want to copy.
3. Click **OK** to save the setup.



**Note:** If you choose more than one card, CardScan does not put the images on the clipboard.

### To use the clipboard to transfer card images

1. Select the card whose image you want to transfer.
2. Click the **QuickCopy** icon.
3. Open the application you want to copy the image to.
4. Use that application's **Paste** or **Paste Special** command to insert the image.

# Printing

CardScan lets you print information from cards in a number of formats, including address books, telephone books, and address labels. You can print all the cards or a selection of cards. When you print, you need to specify:

**Note:** Only cards currently showing in the list view are printed, and they are printed in the order listed.

- **Format** – which information (name, address, and phone number, for example) from the card is printed.
- **Page layout** – the kind of paper you will be using.

## Address book

A	
Academy Design	882-294-4531 <i>Phone</i>
C	
CardScan	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	385-554-7823 <i>Phone</i>
D	
Daniel Bonaville	
4500 N. Street	
North Park, OK 74448	
Daniel Bonaville	385-554-7823 <i>Phone</i>
E	
Eastman Kodak	
President	
343 Main Street	
Utica, NY 12501	
Eastman Kodak	214-545-5243 <i>Phone</i>
F	
Federal Express	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Federal Express	214-545-5243 <i>Phone</i>
G	
Gilbert Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Gilbert Johnson	214-545-5243 <i>Phone</i>
H	
Howard Publishing Company	
President	
1234 Peachtree	
Atlanta, GA 30309	
Howard Publishing Company	147-734-4531 <i>Phone</i>
I	
Interstate Bank	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Interstate Bank	214-545-5243 <i>Phone</i>
J	
John F. Kennedy	
President	
1234 Peachtree	
Atlanta, GA 30309	
John F. Kennedy	214-545-5243 <i>Phone</i>
K	
Kyle Brown	
President	
1234 Peachtree	
Atlanta, GA 30309	
Kyle Brown	385-554-7823 <i>Phone</i>
L	
Lee Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Lee Johnson	214-545-5243 <i>Phone</i>
M	
Marshall Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Marshall Bank	385-554-7823 <i>Phone</i>
N	
Nancy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Nancy Johnson	214-545-5243 <i>Phone</i>
O	
Orlando Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Orlando Bank	385-554-7823 <i>Phone</i>
P	
Peter Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Peter Johnson	214-545-5243 <i>Phone</i>
Q	
Queen Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Queen Bank	385-554-7823 <i>Phone</i>
R	
Ronald Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ronald Bank	385-554-7823 <i>Phone</i>
S	
Sam Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Sam Johnson	214-545-5243 <i>Phone</i>
T	
Tim Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Tim Johnson	214-545-5243 <i>Phone</i>
U	
Ulysses Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ulysses Bank	385-554-7823 <i>Phone</i>
V	
Vince Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Vince Johnson	214-545-5243 <i>Phone</i>
W	
Wendy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Wendy Johnson	214-545-5243 <i>Phone</i>
X	
Xavier Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Xavier Bank	385-554-7823 <i>Phone</i>
Y	
Yvonne Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Yvonne Johnson	214-545-5243 <i>Phone</i>
Z	
Zoe Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Zoe Johnson	214-545-5243 <i>Phone</i>

A	
Academy Design	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
C	
CardScan	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
D	
Daniel Bonaville	
4500 N. Street	
North Park, OK 74448	
Daniel Bonaville	
385-554-7823 <i>Phone</i>	
E	
Eastman Kodak	
President	
343 Main Street	
Utica, NY 12501	
Eastman Kodak	
214-545-5243 <i>Phone</i>	
F	
Federal Express	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Federal Express	
214-545-5243 <i>Phone</i>	
G	
Gilbert Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Gilbert Johnson	
214-545-5243 <i>Phone</i>	
H	
Howard Publishing Company	
President	
1234 Peachtree	
Atlanta, GA 30309	
Howard Publishing Company	
147-734-4531 <i>Phone</i>	
I	
Interstate Bank	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Interstate Bank	
214-545-5243 <i>Phone</i>	
J	
John F. Kennedy	
President	
1234 Peachtree	
Atlanta, GA 30309	
John F. Kennedy	
214-545-5243 <i>Phone</i>	
K	
Kyle Brown	
President	
1234 Peachtree	
Atlanta, GA 30309	
Kyle Brown	
385-554-7823 <i>Phone</i>	
L	
Lee Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Lee Johnson	
214-545-5243 <i>Phone</i>	
M	
Marshall Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Marshall Bank	
385-554-7823 <i>Phone</i>	
N	
Nancy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Nancy Johnson	
214-545-5243 <i>Phone</i>	
O	
Orlando Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Orlando Bank	
385-554-7823 <i>Phone</i>	
P	
Peter Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Peter Johnson	
214-545-5243 <i>Phone</i>	
Q	
Queen Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Queen Bank	
385-554-7823 <i>Phone</i>	
R	
Ronald Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ronald Bank	
385-554-7823 <i>Phone</i>	
S	
Sam Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Sam Johnson	
214-545-5243 <i>Phone</i>	
T	
Tim Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Tim Johnson	
214-545-5243 <i>Phone</i>	
U	
Ulysses Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ulysses Bank	
385-554-7823 <i>Phone</i>	
V	
Vince Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Vince Johnson	
214-545-5243 <i>Phone</i>	
W	
Wendy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Wendy Johnson	
214-545-5243 <i>Phone</i>	
X	
Xavier Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Xavier Bank	
385-554-7823 <i>Phone</i>	
Y	
Yvonne Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Yvonne Johnson	
214-545-5243 <i>Phone</i>	
Z	
Zoe Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Zoe Johnson	
214-545-5243 <i>Phone</i>	

## Rolodex cards

A	
Academy Design	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
C	
CardScan	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
D	
Daniel Bonaville	
4500 N. Street	
North Park, OK 74448	
Daniel Bonaville	
385-554-7823 <i>Phone</i>	
E	
Eastman Kodak	
President	
343 Main Street	
Utica, NY 12501	
Eastman Kodak	
214-545-5243 <i>Phone</i>	
F	
Federal Express	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Federal Express	
214-545-5243 <i>Phone</i>	
G	
Gilbert Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Gilbert Johnson	
214-545-5243 <i>Phone</i>	
H	
Howard Publishing Company	
President	
1234 Peachtree	
Atlanta, GA 30309	
Howard Publishing Company	
147-734-4531 <i>Phone</i>	
I	
Interstate Bank	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Interstate Bank	
214-545-5243 <i>Phone</i>	
J	
John F. Kennedy	
President	
1234 Peachtree	
Atlanta, GA 30309	
John F. Kennedy	
214-545-5243 <i>Phone</i>	
K	
Kyle Brown	
President	
1234 Peachtree	
Atlanta, GA 30309	
Kyle Brown	
385-554-7823 <i>Phone</i>	
L	
Lee Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Lee Johnson	
214-545-5243 <i>Phone</i>	
M	
Marshall Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Marshall Bank	
385-554-7823 <i>Phone</i>	
N	
Nancy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Nancy Johnson	
214-545-5243 <i>Phone</i>	
O	
Orlando Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Orlando Bank	
385-554-7823 <i>Phone</i>	
P	
Peter Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Peter Johnson	
214-545-5243 <i>Phone</i>	
Q	
Queen Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Queen Bank	
385-554-7823 <i>Phone</i>	
R	
Ronald Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ronald Bank	
385-554-7823 <i>Phone</i>	
S	
Sam Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Sam Johnson	
214-545-5243 <i>Phone</i>	
T	
Tim Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Tim Johnson	
214-545-5243 <i>Phone</i>	
U	
Ulysses Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ulysses Bank	
385-554-7823 <i>Phone</i>	
V	
Vince Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Vince Johnson	
214-545-5243 <i>Phone</i>	
W	
Wendy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Wendy Johnson	
214-545-5243 <i>Phone</i>	
X	
Xavier Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Xavier Bank	
385-554-7823 <i>Phone</i>	
Y	
Yvonne Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Yvonne Johnson	
214-545-5243 <i>Phone</i>	
Z	
Zoe Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Zoe Johnson	
214-545-5243 <i>Phone</i>	

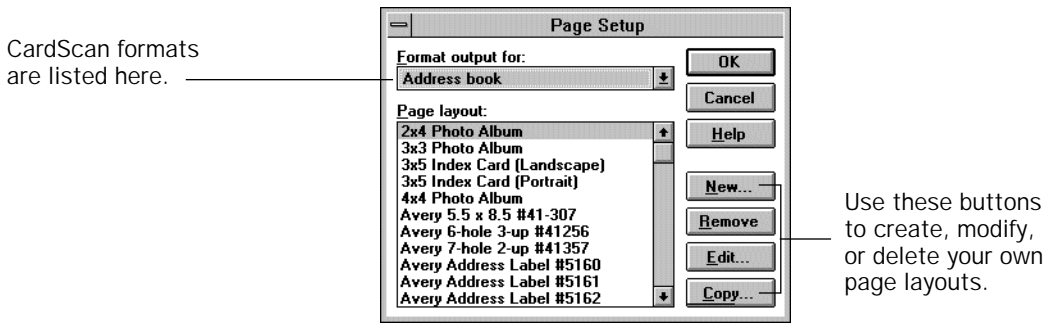
## Envelope

A	
Academy Design	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
C	
CardScan	
1233 Peachtree Park	
Atlanta, GA 30309	
CardScan	
385-554-7823 <i>Phone</i>	
D	
Daniel Bonaville	
4500 N. Street	
North Park, OK 74448	
Daniel Bonaville	
385-554-7823 <i>Phone</i>	
E	
Eastman Kodak	
President	
343 Main Street	
Utica, NY 12501	
Eastman Kodak	
214-545-5243 <i>Phone</i>	
F	
Federal Express	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Federal Express	
214-545-5243 <i>Phone</i>	
G	
Gilbert Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Gilbert Johnson	
214-545-5243 <i>Phone</i>	
H	
Howard Publishing Company	
President	
1234 Peachtree	
Atlanta, GA 30309	
Howard Publishing Company	
147-734-4531 <i>Phone</i>	
I	
Interstate Bank	
CEO	
1234 Peachtree	
Atlanta, GA 30309	
Interstate Bank	
214-545-5243 <i>Phone</i>	
J	
John F. Kennedy	
President	
1234 Peachtree	
Atlanta, GA 30309	
John F. Kennedy	
214-545-5243 <i>Phone</i>	
K	
Kyle Brown	
President	
1234 Peachtree	
Atlanta, GA 30309	
Kyle Brown	
385-554-7823 <i>Phone</i>	
L	
Lee Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Lee Johnson	
214-545-5243 <i>Phone</i>	
M	
Marshall Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Marshall Bank	
385-554-7823 <i>Phone</i>	
N	
Nancy Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Nancy Johnson	
214-545-5243 <i>Phone</i>	
O	
Orlando Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Orlando Bank	
385-554-7823 <i>Phone</i>	
P	
Peter Johnson	
President	
1234 Peachtree	
Atlanta, GA 30309	
Peter Johnson	
214-545-5243 <i>Phone</i>	
Q	
Queen Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Queen Bank	
385-554-7823 <i>Phone</i>	
R	
Ronald Bank	
President	
1234 Peachtree	
Atlanta, GA 30309	
Ronald Bank	
385-554-7823 <i>Phone</i>	
S	
Sam Johnson	
President	
1234 Peachtree	

## Selecting a format and page layout

CardScan comes with several layouts for printing your cards. It also provides an easy-to-use page layout tool that you can use to create your own layouts. Before printing, use Page Setup to choose the format and page layout you want to use.

1. Choose **Page Setup** from the File menu.
2. Choose one of the formats from the menu in the Page Setup dialog box. For example, choose *Phone book* to print a listing of names and telephone numbers.



3. Choose one of the page layouts, or create a new one.
4. Click **OK**. When you print, CardScan uses the format and layout you selected.

## Previewing a page before you print

Use Preview to see how a page will look before printing it.

1. Choose **Print Setup** from the File menu to choose the printer you want to use.
2. Choose **Preview** from the File menu to check the appearance of the page.
3. If you are satisfied with the appearance of the page, click the **Print** button to print.



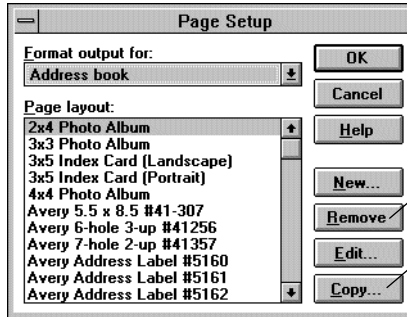
# Creating a new page layout

Hint: Before you create a new page layout, browse through the pre-defined CardScan layouts. It might be easier to modify an existing format than to create a new one.

Although CardScan comes with a number of layouts, you may want to create additional layouts or adjust existing ones.

## To create a new layout

1. Choose **Page Setup** from the File menu. You see the Page Setup dialog box.



To remove a layout, click Remove.

Click here to copy an existing layout that you can modify to suit your needs.

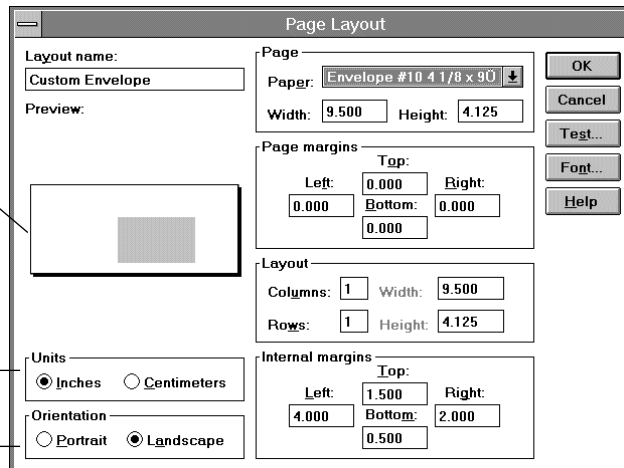
2. Click **New** to create a new layout, or **Copy** to start with an existing layout.

You see the Page Layout dialog box.

As you adjust the layout, the page is shown in the preview.

Use Page Layout to specify page size, margins, number of columns, and space between columns.

You can change the units of measurement and the page orientation here.



3. Type a name for the new layout.
4. Specify the page size, margins, number of columns and rows, and the space between columns. Your changes are previewed in the diagram on the left.
5. Click **Font** to select a font to use with the new layout.
6. Click **Test** to see quickly how information will be printed.
7. Click **OK** when you are satisfied with the new layout.

# Dialing

If you have a modem connected to your PC, you can use CardScan to dial telephone numbers.

## Using Autodial

**Shortcut:** In the summary view, you see a telephone pointer when the cursor is over a telephone number. Click the left mouse button to dial the number.

Before you start to use CardScan's autodialer, choose **Preferences** from the Edit menu, and set up your Dial preferences.

1. In any view, click the Dial icon, or choose **Dial** from the Card menu.

You see the CardScan Autodialer dialog box.

If the number you want to dial is not listed here, choose the number you want from the list below, or type the number.

If you are using a calling card to make the call, click here, and choose the calling card you want to use.

The screenshot shows the CardScan Autodialer dialog box. It has a title bar 'CardScan Autodialer'. The 'Name' field contains 'Richard J. Palmer, Vice President, Marketing, USA Phone One, Inc.'. The 'Number' list box contains three entries: '[617] 555-1000', 'Tel [617] 555-1000', and 'Fax [617] 555-1010'. There are three input fields: 'Local area code:', 'Outside line:' (with a checked checkbox), and 'Calling card:' (with an unchecked checkbox). At the bottom are three buttons: 'Dial', 'Close', and 'Help'.

Type the local area code here so that CardScan skips it if you are making a local call.

In the Outside line box, enter the number you need to dial to access an outside line.

**Note:** Type commas anywhere in the number to insert pauses.

2. Choose the correct number from the list of numbers, or type the number you want to dial.
3. Enter the local area code so that CardScan skips the area code for local calls.
4. If you need to dial a prefix (for example, 9) to get an outside line, click the **Outside line** box, and type the prefix.
5. Click **Dial** to make the call. The Dial button changes to Hangup.
6. When the other party answers the phone, lift your handset, then click **Hangup** to disconnect the modem.

# Exporting CardScan Data

**Note:** If you want to use CardScan data with one of the supported contact managers, it is easier and more accurate to use the **Transfer** command.

You can export a CardScan address list for use in other applications that can import text files. CardScan provides export templates for Lotus Organizer, Sidekick, and many other contact managers.

You can also create your own export template for use with any application that can import a comma- or tab-delimited text file. Most applications, including word processors, spreadsheets, and database programs, can import text files.

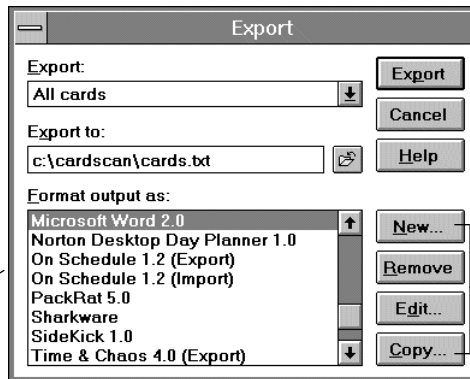
Appendix B provides a list of applications for which CardScan provides export templates. For the most up-to-date list, see the Read Me file installed with CardScan.

## Exporting to another application

Use these steps to export card information to an application for which an export template exists.

1. Open the CardScan list you want to export. If you want to export only a few cards, select them in the list view.
2. Choose **Export** from the File menu.

You see the Export dialog box.



Use these buttons to create, modify, or delete your own export templates.

**Note:** If there is no export template listed for your application, follow the steps on the following page to create a template for that application.

Choose:

**All cards** to export the entire database.

**All cards in list** to export just the cards currently showing in the list view.

**Selected cards** to export just cards currently highlighted in the list view.

Export templates are listed here. CardScan includes templates for over thirty applications.

3. Choose what you want to export (all cards in the database, all cards displayed in the list view, or selected cards) and the application you want to export them to.
4. Type a name for the text file.
5. Choose the template you want to use, and click **Export**. CardScan writes the data to the text file.

- Open the other application and follow the instructions in its documentation to import the text file.

### Creating a new export template

If CardScan does not include a template for your application, you can easily create a text file that formats the information to suit your application's needs.

CardScan allows you to choose the data to put in each field and how to order the fields in the export file. For example, one application might require the First Name field to follow the Last Name field while a different application might require the reverse. You can also select whether the text is delimited by tabs or by commas, whichever your application requires.

- Choose **Export** from the File menu.
- From the Export dialog box, choose **New**, or choose **Copy** to use an existing template as the basis for your new one.

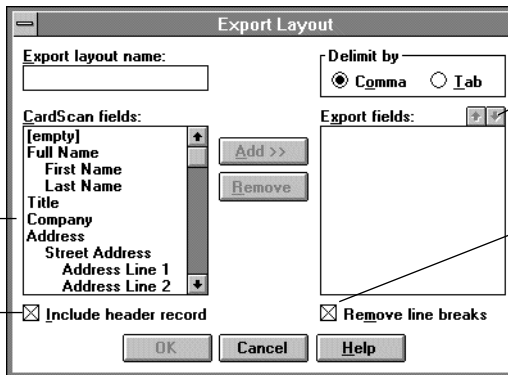
You see the Export Layout dialog box.

Type a name for the layout.

Specify whether to separate fields by tabs or commas.

Click the fields you want to include and click **Add**.

Click here to include a header record with field names in the export file.



Use the arrows to change the order of the fields.

Click here to remove line breaks in the middle of the fields.

- Type a name for the new template, and indicate how to delimit the fields (with tabs or commas).
- In the CardScan fields list, click the fields you want to include, and click the **Add** button to add them to the Export fields list.
- If you want to include a header record that identifies each column, click the **Include header record** option.

Some CardScan fields, for example, Title, Address, or Notes, can contain several lines of text. The lines are separated in CardScan by line breaks. Some applications can't handle fields with line breaks. Click **Remove line breaks** to replace line breaks with spaces and put all the information on one line.

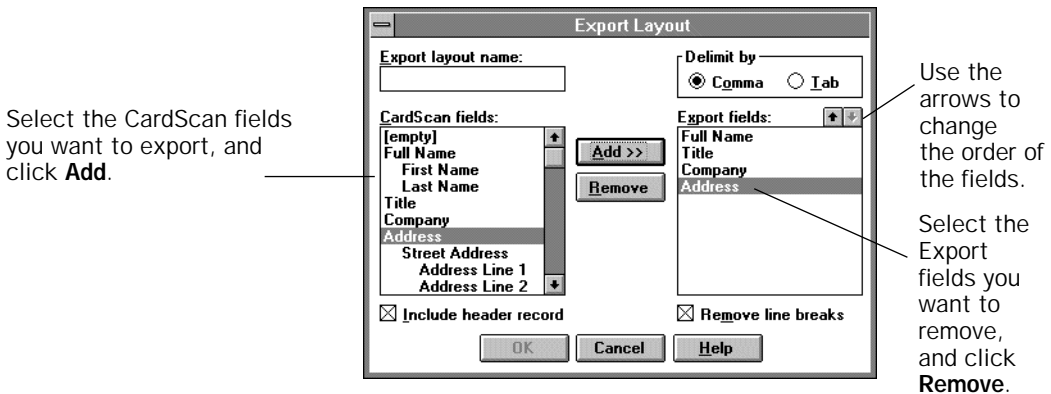
**Note:** Appendix B lists applications for which CardScan includes export templates.

**Note:** Read the documentation for the application into which you are planning to import the file to see whether to use tabs or commas as the field delimiter.

## To edit an existing export layout

1. Choose **Export** from the File menu.
2. From the Export dialog box, choose the layout to edit.
3. Click **Edit**.

You see the Export Layout dialog box.



4. Make the changes you want and click **OK**.

CardScan saves the layout with your changes.

## To copy an export layout

With the Copy option you can use an existing layout as the basis for your new one.

1. Choose **Export** from the File menu.
2. From the Export dialog box, select the layout you want to copy.
3. Click **Copy**.
4. Type a new name for the layout.
5. Make the changes to the layout, and click **OK**.

CardScan saves the new layout with your changes.

## To remove an export layout

1. Choose **Export** from the File menu.
2. From the Export dialog box, choose the layout to delete.
3. Click **Remove**.

**Note:** You can delete any of the export layouts, including the ones that came with CardScan.

# Mail Merging with CardScan

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Mail merging allows you to create a single document (like a form letter) and combine it with CardScan information (for example, name, company name, and address) to create many customized copies of the document. You can use your CardScan address list to perform a mail merge with any word processor that imports ASCII text files.

The following sections contain step-by-step instructions for mail merging to a form letter with Word for Windows and WordPerfect for Windows.

**Note:** You can change which fields are exported by editing the Microsoft Word export template.

## To mail merge with Word for Windows

1. Follow the instructions on page 34 for exporting CardScan data to another application. You can choose to export all cards in the database, all cards in the list view or selected cards.

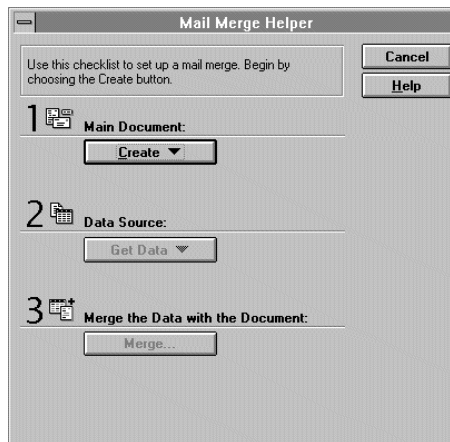
Select the Microsoft Word export template.

Save the export file using the name mailmerg.txt.

2. Start Microsoft Word.

Open the file you want to use as the main document (the form letter), or create a new document.

3. From the Tools menu, select **Mail Merge**. You see the Mail Merge Helper dialog box.



4. From the Create drop-down menu, select **Form Letters**. Click **Active Window**.

**Note:** You can enter spaces, commas, and carriage returns between merge fields as needed.

5. From the Get Data drop-down menu, select **Open Data Source**.  
Select **Text Files (\*.txt)** from the Locate Files of Type drop-down menu.  
Locate the file you exported (mailmerge.txt). Select the file and click **OK**.
6. You see a message explaining that there are no merge fields in your document. Click **Edit Main Document**.
7. Click where you want a merge field (data from CardScan) to appear in your Word document.
8. Click **Insert Merge Field** on the Mail Merge toolbar.  
Select the field you want to insert.  
The field name appears inside double brackets (for example, <<Full\_Name>>) at the insertion point. When you print your merged document, in each copy the field name is replaced with CardScan data in that field (in the above example, the actual full names).
9. Repeat steps 7 and 8 for each merge field you want to insert. A sample form letter appears below.

<p>Denali Associates 14410 Couloir Ave., Snowdon, AK 63457</p> <p>October 23, 1995</p> <p>&lt;&lt;Full_Name&gt;&gt; &lt;&lt;Company&gt;&gt; &lt;&lt;Address&gt;&gt;</p> <p>Dear &lt;&lt;First_Name&gt;&gt;,</p> <p>It has come to our attention that at least one pair of Denali Extreme crampons manufactured for the 1995 season has contained a slight defect in craftsmanship. To insure your safety and maintain the quality of our products, Denali Associates is recalling all Extremes purchased this year. Please return your crampons to the above address; a replacement pair will be sent within two weeks.</p> <p>Sincerely,</p> <p>Kevin Brown President</p>
--



10. Click the **Mail Merge** button on the toolbar, or select **Mail Merge** from the Tools menu and click **Merge**.

You can choose to print the merged documents, or save them as a new file.

**Note:** You can change which fields are exported by editing the WordPerfect export template.

### To mail merge with WordPerfect for Windows

1. Follow the instructions on page 34 for exporting CardScan data to another application. You can choose to export all cards in the database, all cards in the list view, or selected cards.

Select the WordPerfect export template.

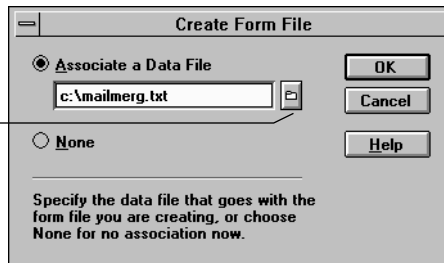
Save the export file using the name mailmerg.txt.

2. Start WordPerfect.

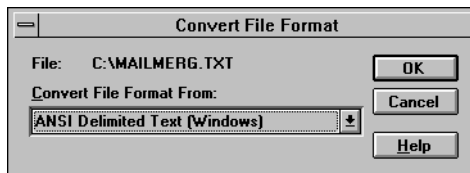
You will first specify the data file to use, and then create the main document (the form letter).

3. From the Tools menu, select **Merge**. You see the Merge dialog box.
4. Click **Form**. You see the Create Merge File dialog box.
5. Click **New Document Window**. You see the following.

Click here to specify the data file to use for your mail merge.



6. Supply the path to the export file (mailmerg.txt).  
Click **OK**. The Merge toolbar appears at the top of your screen.
7. On the Merge toolbar, click **Go to Data**. You see the following.



**8. Select ANSI Delimited Text (Windows).**

Click **OK**. Your data is converted, and you see a list of fields and their contents for each record you exported.

**9. On the Merge toolbar, click Go to Form.**

Compose your document, or cut and paste the contents of an existing document into the blank form.

Be sure to leave space for the CardScan information you want to insert.

**10. Click where you want a merge field (data from CardScan) to appear in your WordPerfect document.**

**11. On the Merge toolbar, click Insert Field.** You see the Insert Field Name or Number dialog box, listing the fields you exported from CardScan.

The following table lists the order in which fields are exported by CardScan's WordPerfect template.

WordPerfect Field #	CardScan Field Name
FIELD(1)	Full Name
FIELD(2)	Title
FIELD(3)	Company
FIELD(4)	Address Line 1
FIELD(5)	Address Line 2
FIELD(6)	Address Line 3
FIELD(7)	City
FIELD(8)	State
FIELD(9)	Zip
FIELD(10)	First Name
FIELD(11)	Last Name

**12. Select the field to insert, and click Insert.**

The field number appears at the insertion point (for example, FIELD(1) to indicate the Full Name field). When you print your merged document, in each copy the field number is replaced with the CardScan data in that field (in the above example, the actual full names).

**Note:** You can enter spaces, commas and carriage returns between merge fields as needed.

- 13.** Repeat steps 10 through 12 for each field you want to insert. Click **Close** when you are finished inserting fields.  
A sample form letter appears below.

<p style="text-align: center;"><b>Denali Associates</b> 14410 Couloir Ave., Snowdon, AK 63457</p> <p>October 23, 1995</p> <p>FIELD(1) FIELD(4) FIELD(5) FIELD(6) FIELD(7), FIELD(8), FIELD(9)</p> <p>Dear FIELD(10),</p> <p>It has come to our attention that at least one pair of Denali Extreme crampons manufactured for the 1995 season has contained a slight defect in craftsmanship. To insure your safety and maintain the quality of our products, Denali Associates is recalling all Extremes purchased this year. Please return your crampons to the above address; a replacement pair will be sent within two weeks.</p> <p>Sincerely,</p> <p>Kevin Brown President</p>
---

- 14.** Click **Merge** on the Merge toolbar. You see the Merge dialog box.

- 15.** Click **Merge**.

You can choose to print the merged documents, or save them as new files.

Click **OK**.

# Importing Address Lists

If you have names and addresses in another application, you can import them into CardScan. You can import any list that can be saved as a text file with the fields delimited by tabs or commas.

## CardScan fields

Each field (category of information, for example, first name, last name, address, company) can be imported to a corresponding field in CardScan. These fields are listed below.

CardScan Fields

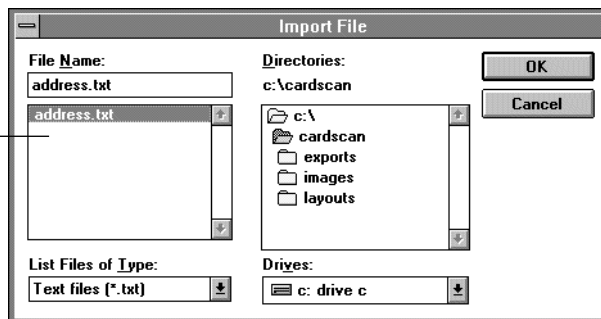
Full Name	Address Line 2	Phone 1
First Name	Address Line 3	Phone 2
Last Name	City	Phone 3
Title	State	Phone 4
Company	Zip Code	Phone 5
Address	Phone	Phone 6
Street Address	Fax	Notes
Address Line 1		Other

To give you maximum flexibility, some field information overlaps. For example, if you include the Full Name field you should not include the First Name and Last Name fields.

## To import a file from another application

1. From the other application, save the file as a text file delimited by tabs or commas.
2. Start CardScan, and choose **Import** from the File menu.  
You see the Import File dialog box.

Choose the file you saved in step 1.



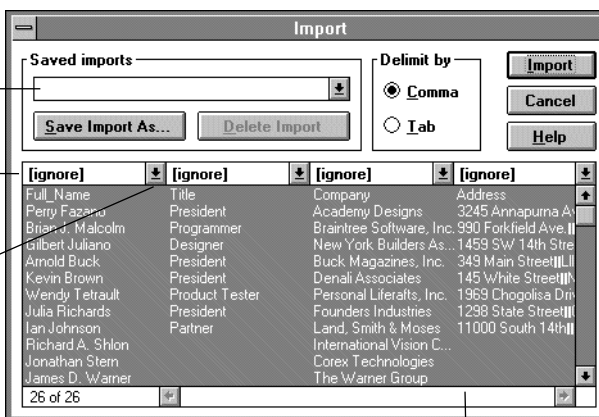
3. Choose the file you saved in step 1, and click **OK**.

After a brief pause, you see the Import dialog box.

Choose the import template you want to use, if any.

CardScan displays a column for each field from the original file.

Use the menus to assign names to the fields.



If the columns don't look right, try changing the delimiter.

Use the scroll bars to see additional fields.

The Import dialog box has a column for each field in the original file.

4. Use the menus at the top of each column to assign field names to the columns you want to include.

To omit a field, choose **[Ignore]**.

To include a column that doesn't have a corresponding CardScan field name, choose **Notes** or **Other**.

5. Initially all the records in the list are selected. If you don't want to import all the records, select just those you want to import. Use **Shift-click** or **Ctrl-click** to select multiple records.
6. Click **Import** when you are ready to import the file.

### To create a new import template

You can save a template for information you import frequently.

1. In the Import dialog box, click the **Save Import As** button.

Click here to create a new import template.



2. Type a name for the new template.
3. Click **OK** to save the template.

# CardScan Preferences

---

You can use preferences to customize CardScan for your needs. CardScan includes the following preferences:

- General
- Scan
- Dial

## Setting preferences

You can set preferences or change them at any time.

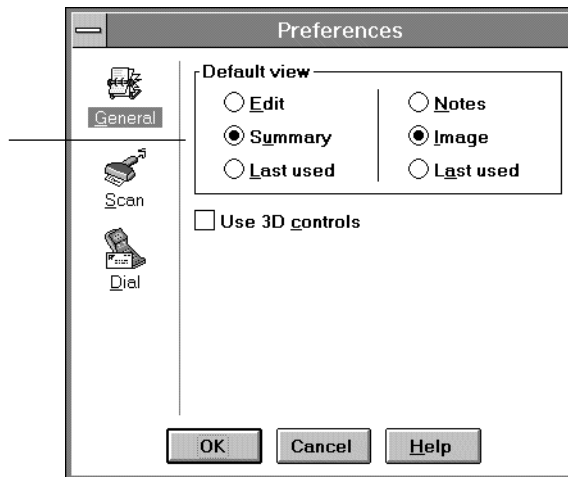
1. Choose **Preferences** from the Edit menu.
2. Click the icon for the type of preferences you want to set.

### General preferences

Use General preferences to determine which card views are displayed by default.

1. In the Preferences dialog box, click the General icon.

Choose the option for the default card view.



- Edit Displays the edit view by default.
- Summary Displays the summary view by default.
- Last used Displays the last view used.
- Notes Displays the notes view by default.
- Image Displays the image view by default.
- Last used Displays the last view used.

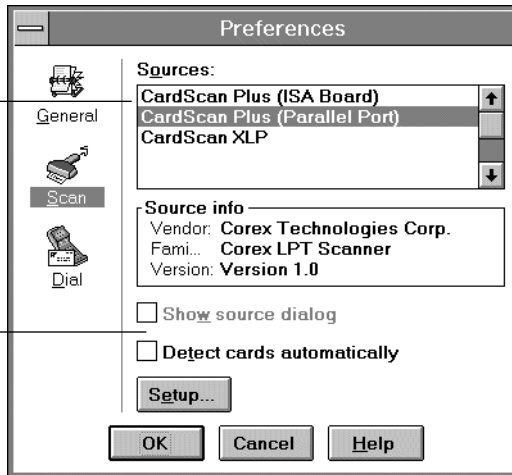
2. Choose the options for the default view and click **OK**.
3. Select **Use 3D Controls** to display CardScan screens using the three-dimensional look common to many Windows applications.

### Scan preferences

1. In the Preferences dialog box, click the Scan icon.  
You see the Scan Preferences dialog box.

If you have more than one scanner, choose the one you want to use.

This region displays options specific to the selected scanner. See the *Scanner Setup* booklet or your *Quick Reference* card for more information.

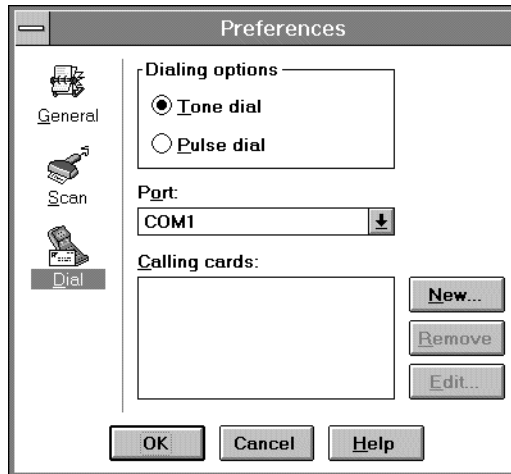


2. Choose the scanner you want to use. Specify scanner settings if necessary.
3. Click **OK**.

## Dial preferences

1. Click the Dial icon.

You see the Dial Preferences dialog box.



2. Specify whether to use **Tone dial** or **Pulse dial**, and the port your modem is attached to.
3. If you want to use a calling card for automatic dialing, click **New** to save the calling card name, access code, and your account number.
4. Click **OK**.

# Appendix A - Menu Options

---

## File Menu

New  
Create a new CardScan address list.

Open  
Open an existing CardScan address list.

Save As  
Save the current address list with a new name.

**Import**  
Import names and addresses from another application.

Export  
Export CardScan data to another application.

Transfer  
Send CardScan data directly to a contact manager, such as ACT! or Commence.

Preview  
View the current print selection.

Print  
Print the CardScan address list.

Page Setup  
Select or define a layout to use for printing.

Print Setup  
Specify the printer to use.

Exit  
Close CardScan.

1. [CardScan database name]
2. [CardScan database name]

Address lists are shown here for quick selection.

## Edit Menu

Undo  
Cancel the last editing change.

Cut  
Delete selected text and place it in the clipboard.

Copy  
Copy selected text to the clipboard.

Copy Setup  
Select which information to copy to the clipboard.

Paste  
Insert the contents of the clipboard.

Clear  
Delete selected text.

Change Case  
Capitalize the first letter of each word in the selected text.

Preferences  
Change CardScan's setup to suit your needs.

## **Sort Menu**

By Name  
Sort the list alphabetically by last name.  
By Company  
Sort the list alphabetically by company name.  
By Verified  
Sort the list by date with the unverified cards first.

## **Card Menu**

Scan  
Start scanning a card.  
Process Cards  
Read information into CardScan from scanned cards that have not yet been processed.  
New  
Insert a blank card.  
Delete  
Delete the selected card(s).  
Dial  
Dial the number on the currently selected card.  
Delete Image  
Discard the image for the selected card(s).  
Delete All Images  
Discard the images for all cards.  
Find Duplicates  
Find duplicate cards.

## **View Menu**

List  
Show the list view.  
Edit  
Show the edit view for the selected card.  
Summary  
Show the summary view for the selected card.  
Image  
Show the image view for the selected card.  
Notes  
Show the notes view for the selected card.  
Next  
Display the next card in the list.  
Previous  
Display the previous card in the list.  
Big Picture  
Display the card image in a separate window that you can resize.

## Help Menu

Contents

Show the Help table of contents.

Search for Help On...

Display Help for a topic you specify.

How to use Help

Display instructions for using CardScan Help.

Register

Register your copy of the CardScan software.

About CardScan

Display information about CardScan.

# Appendix B

## Export/Import Templates

---

This table lists the applications for which CardScan supplies templates for exporting and importing.

<b>Product Name</b>	<b>Product Name</b>
1st ACT!	GoldMine
ACT!	Hot Line
Address Manager	Info Select
Advantage	Instant Recall
Ami Pro	IntelliLink
AnyTime	Lotus Organizer
Ascend	Maximizer
BizCard Reader	METZ Phones
CardGrabber	Microsoft Word
Commence	On Schedule
Crossties	PackRat
CypherScan	Sharkware
Day-Timer Organizer	SideKick
Delrina Daily Planner	Time & Chaos
Desktop Set	Time Planner Deluxe
Dynodex	TouchBase
ECCO	WinFax Pro
Espresso	WordPerfect
Generic ASCII	YourWay

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## If you like CardScan SE... you'll love the CardScan full version!

---

The full version of CardScan offers additional features that further enhance your productivity:

- **Transferring cards to a contact manager.** You can transfer cards from a CardScan address book to a supported contact manager, and view the cards from within the contact manager application. For a list of supported contact managers, see your on-line Help file.
- **Integration with WinFax and FaxWorks (Windows version only).** In both of these fax applications, you can use the CardScan database directly as a fax phonebook.
- **Copying.** You can copy card text and images to the clipboard for use in other applications.
- **Dialing.** You can dial phone numbers using a modem.
- **Finding duplicates.** You can find duplicate records in the CardScan database.

In addition, these features are expanded in the full version of CardScan:

- **Printing.** The full version of CardScan includes many more page layouts, for printing address books, labels, envelopes, phone books, and rotary cards. You can also create custom layouts using the full version.
- **Exporting.** The full version of CardScan includes more templates for exporting to other applications, and allows you to create custom export templates.

As a CardScan SE customer, you're entitled to a special discount on the full version of CardScan. Regularly \$99, the full version can be yours for only \$39.95!

### How to Upgrade

It only takes a few minutes to upgrade to the full version of CardScan. You can upgrade by modem, by faxing or mailing in a pre-printed form, or by dialing a toll-free number.

No matter how you upgrade, the additional features supplied with the full version will be unlocked immediately from the files already installed on your computer. There's no waiting for new diskettes or documentation!

To upgrade to the full version of CardScan, select **Upgrade** from the Help menu and follow the instructions on the screen, or simply call **800-942-6739**.

### Upgrade Today!