



**CASTOR ADVANCED
SOLUTIONS LIMITED**
双剑软件程序开发有限公司

Castor Business Card Scanner User Guide

Microsoft Dynamics CRM 4.0 compatible

Version 1.0.2

Castor Advanced Solutions Ltd.

www.CastorSoft.com



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Castor Business Card Scanner _____

Overview

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

Features

Castor Business Card Scanner for Microsoft CRM features include:

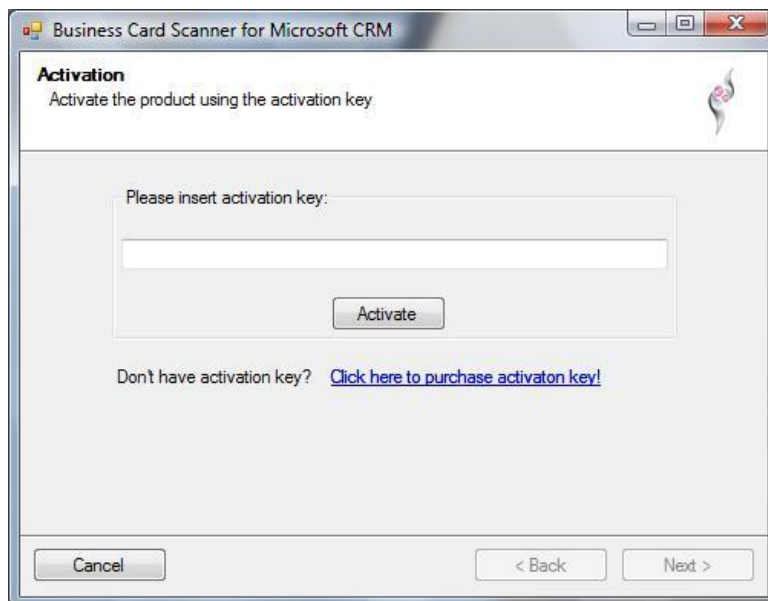
- Creating Lead record from Business Card information.
- Creating Contact record from Business Card information.
- Creating Account record from Business Card information.
- Support for Microsoft CRM 4.0.
- Automatic detection of duplicates based on name and/or email.
- Data validation screen.
- Imports the card scanned image as a note.
- Advanced Field map tool.
- Support for offline mode.
- Support for multiple organizations.

Importing Card Information ---

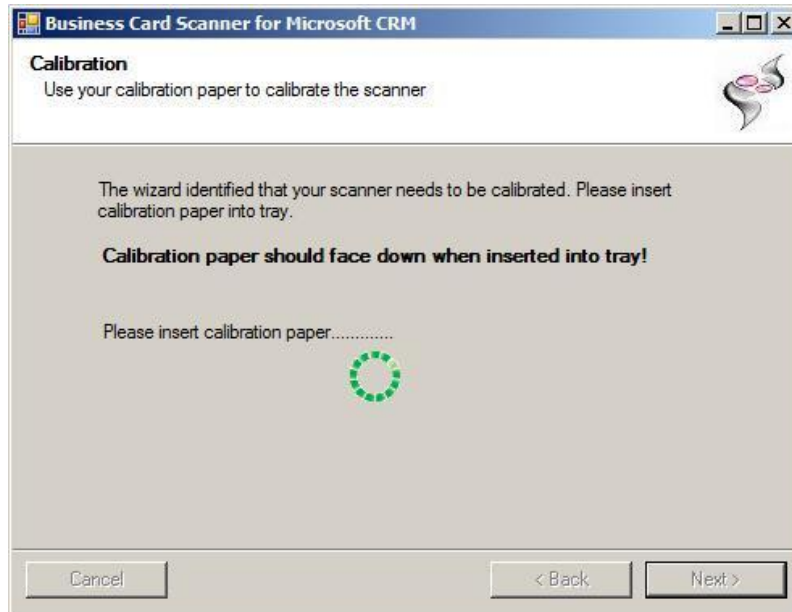
1. Before launching the application, please **make sure** you have installed the ScanShell 800N driver and connected the scanner according to the instruction in the **Installation Guide** document.
2. Plug the scanner USB to your computer.
3. To launch the Wizard application for importing your Business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



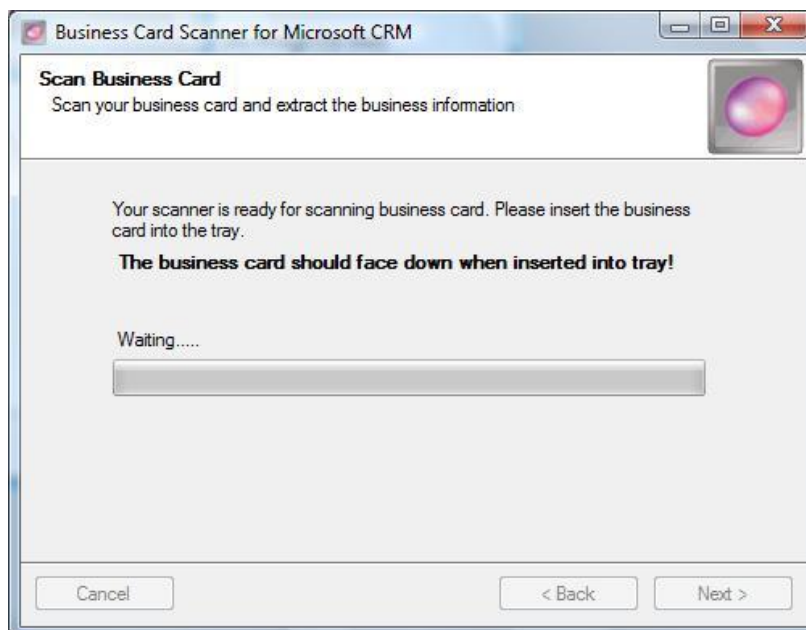
1. **Welcome** step presents short introduction. Use the check box on the bottom to avoid this step again in the future.



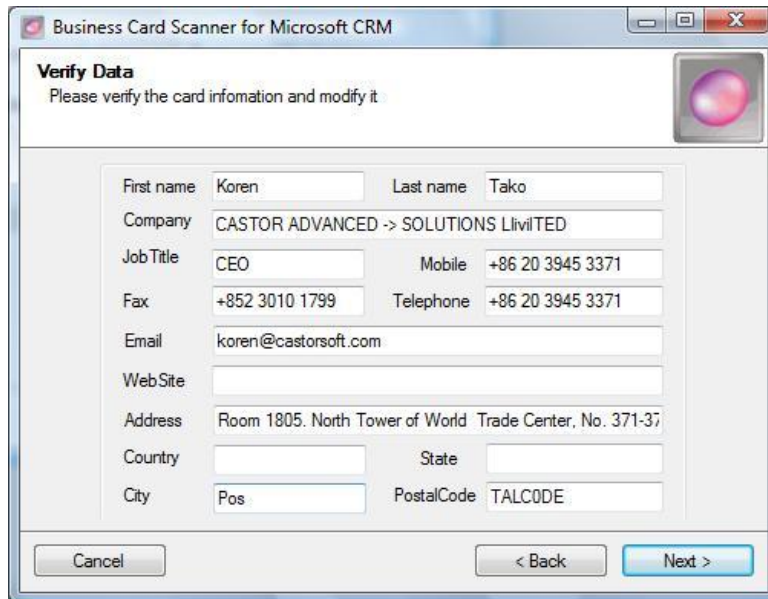
2. **Activation** is made once. Use the activation key provided to you to perform the activation. Insert the key to the text box and press the button to activate.



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



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

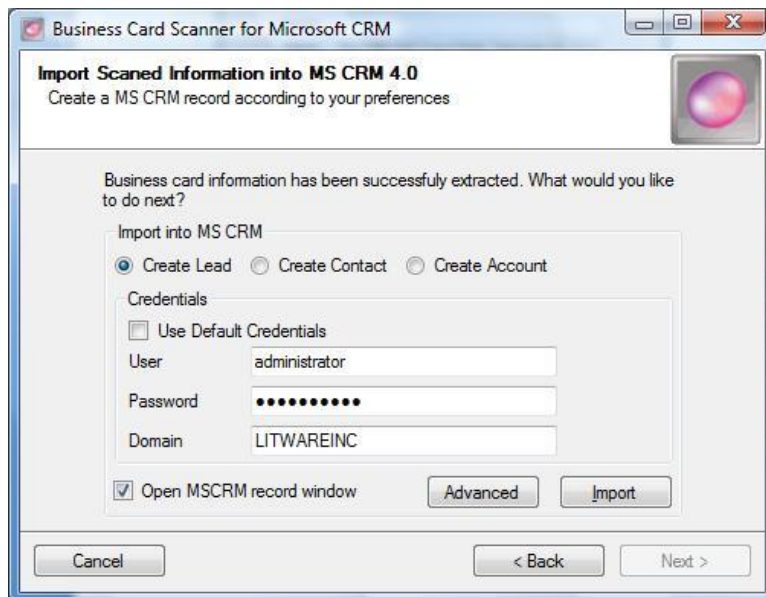


Verify Data
Please verify the card information and modify it

First name	Koren	Last name	Tako
Company	CASTOR ADVANCED -> SOLUTIONS LIVED		
Job Title	CEO	Mobile	+86 20 3945 3371
Fax	+852 3010 1799	Telephone	+86 20 3945 3371
Email	koren@castorsoft.com		
WebSite			
Address	Room 1805, North Tower of World Trade Center, No. 371-37		
Country		State	
City	Pos.	PostalCode	TALCODE

Buttons: Cancel, < Back, Next >

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



Import Scanned Information into MS CRM 4.0
Create a MS CRM record according to your preferences

Business card information has been successfully extracted. What would you like to do next?

Import into MS CRM

Create Lead Create Contact Create Account

Credentials

Use Default Credentials

User: administrator

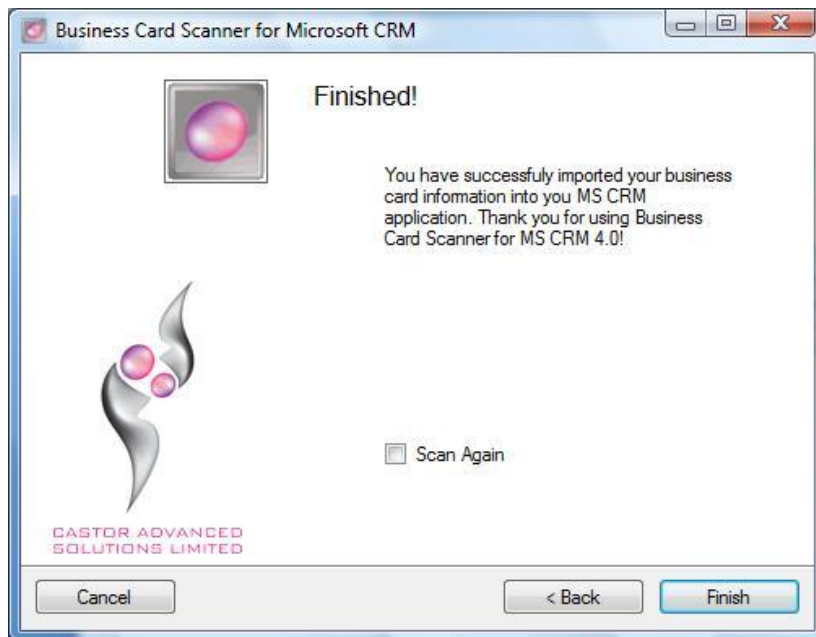
Password: ●●●●●●●●

Domain: LITWAREINC

Open MSCRM record window

Buttons: Cancel, < Back, Next >

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



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