



Cardiris 5

Getting Started Guide

Product versions

The Cardiris 5 is a standalone software product that can be used with any twain based scanner to process the business card information. It is also bundled in the IRIScan Anywhere product. There are two versions of the software.

Cardiris Pro 5

Cardiris Corporate for Microsoft Dynamics CRM 5

Both operate in the same fundamental way. In this guide we will cover the functions of the Pro 5 and then the differences in the CRM 5.

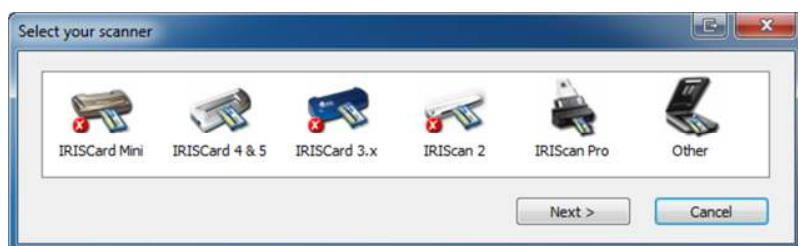
Cardiris Pro 5

Scanner setup

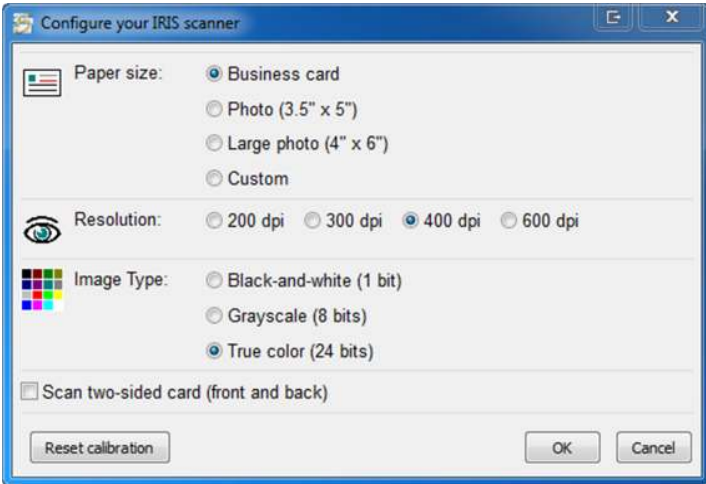
The product can be used with any of the business card capable scanners from our previous or current products to process individual card images. It can also process images of multiple cards in the same image and extract the individual images for processing. You can also open prescanned images for processing by clicking the down arrow next to scan and change it to Load.



In the Cardiris software Go to the Settings menu > Scanner and select the scanner you are using



If you select an Iris scanner and click next you will get a window similar to the one pictured below depending on the scanner model selected.



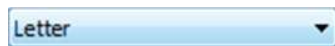
Set your scan options, click on OK and then click on the scan button in Cardiris.



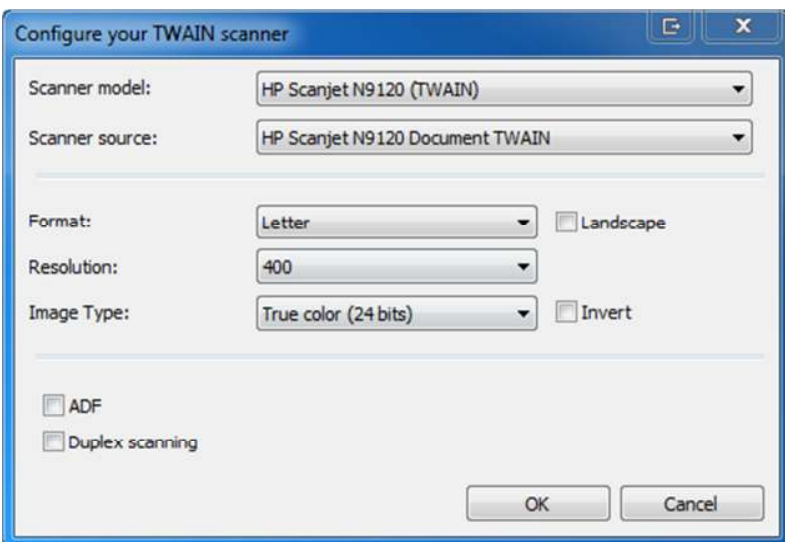
If you are using a non-IRIS scanner then highlight on the "Other" choice and click on Next



Pick the Scanner Source then the scanner model and configure as pictured making sure the format is set to the appropriate choice. If your scanner is not listed find the closet match or use <Twain> <Other Models>.



Letter is used when scanning one image of multiple cards as will be discussed below. Typically used for flatbed scanning.



If your scanner has a business card capable automatic document feeder then check the ADF box.

If it can scan the front and back in one pass then check the Duplex scanning box.

This will place both images in the contact field in Cardiris.



Flatbed scanning

You can place up to 10 cards on the glass of the scanner. You want there to be a gap around all edges of the card keeping it away from the edge of the scanner bezel. You also want a dark background so the software can separate the individual card images from the larger image. A black or dark sheet of paper placed behind the cards works best. Scan at 400 DPI in color.

You could also leave the lid to the scanner open but on some scanners you risk light leaking in on an edge of the image creating a very subtle white line making it impossible for the software to extract the individual card images.



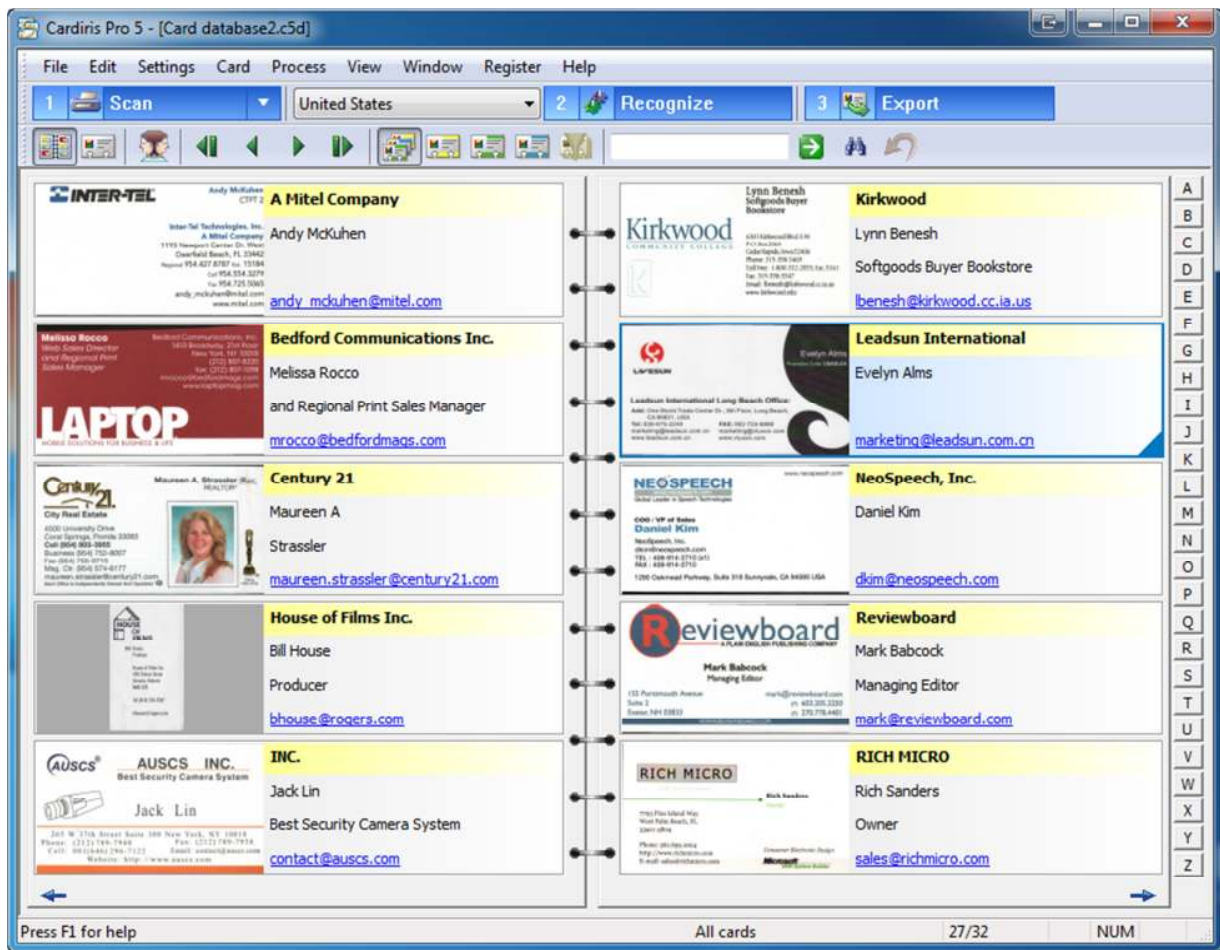
For very dark cards you would do the opposite and just close the lid to the scanner to create a white background. It is useful then to separate the cards into dark and light for this kind of processing.

You can also scan outside of the software and save the scans as image files which can then be processed in the software. Open Cardiris and go to File > Load Card images and navigate to where the images are stored and select one or more of the images. Go to the Process menu > Extract images to separate the individual images from the larger image.

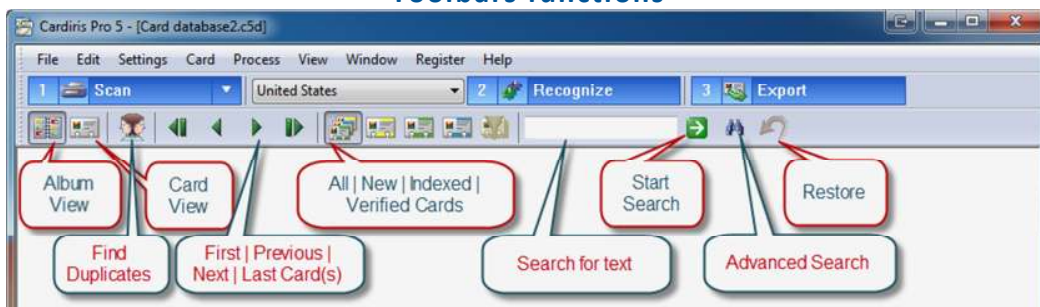
Program Usage

The workflow is to; 1. Scan | 2. Recognize & verify | 3. Export

Prior to Exporting double click on the desired card to enter the contact view to verify the information is correct and set a card status for easy segregation of the Cards. You can also set Categories or include custom fields.



Toolbars functions





In the Contact view you can select the Front | Back | Picture tabs to scan/view secondary images for the contact.

Information that is on the Card that does not have a location is put into the Extra tab on the lower left. A notes tab is provided to allow additional information to be typed in.

Front Back Picture

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State: Florida United States

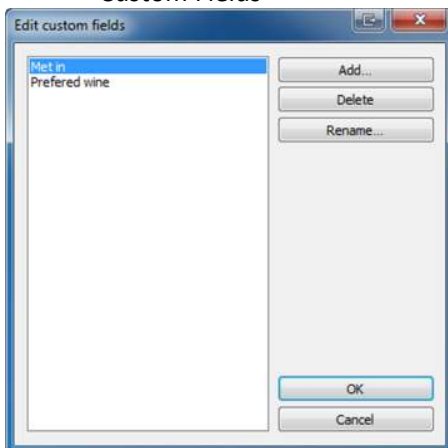
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Skype:
Fax: (954) 755-0715
E-mail: maureen.strassler@century21.com
Website:
Custom Fields: Preferred wine, Met in
Categories:
Created: 9/3/2010 5:58:41 PM
Modified: 9/3/2010 6:01:10 PM
New I V

Notes Extra
City Real Estate Business Msg. Ctr. Each Office Is Independently Owned And Operated

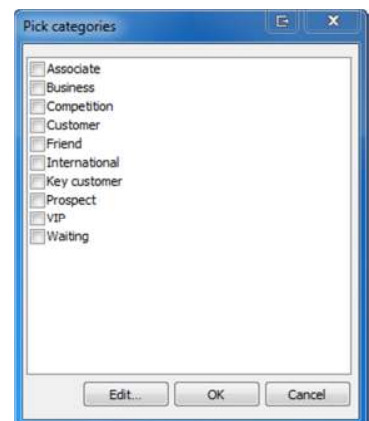
Press F1 for help Search result 22/32 NUM

Note the N I V buttons for categorizing the cards as New, Indexed or Verified.

Custom Fields



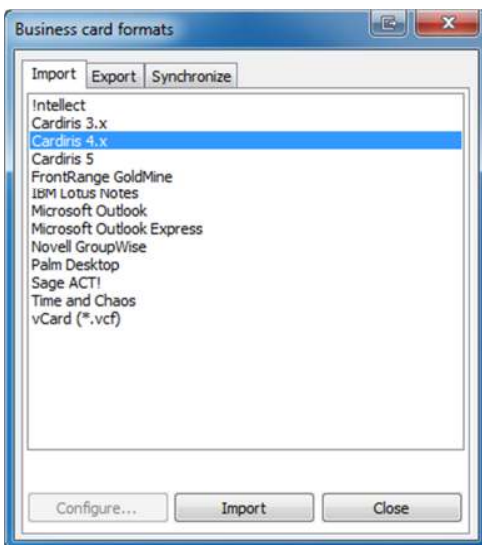
Categories, click on Edit to add or remove



Import, Export & Synchronize.

Import

Commonly used to import data from another Cardiris database or program. This is useful to consolidate information and/or export elsewhere.

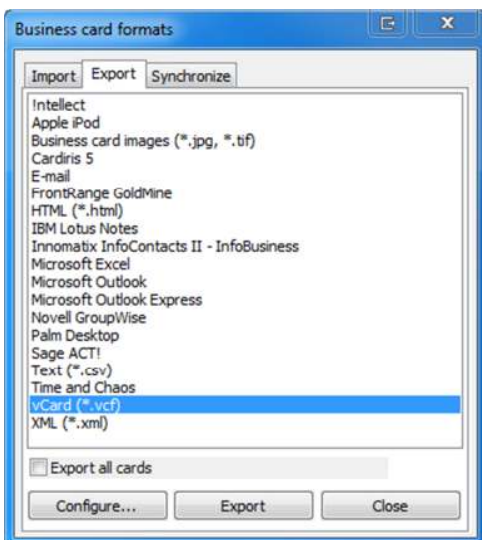


This is an easy way to bring in information from a previous Cardiris version.

You can also import individual vCards files or vCards files that contain multiple contacts.

Export

The most used items are Microsoft Excel, Microsoft Outlook, Text (*.csv) and vCard (*.vcf)



Note the **Configure** button on the lower left of the screen. This is important and allows you to configure options relevant to the output format you have chosen.

In Outlook you need to choose the contacts folder where you want the information sent and whether to include the card image.

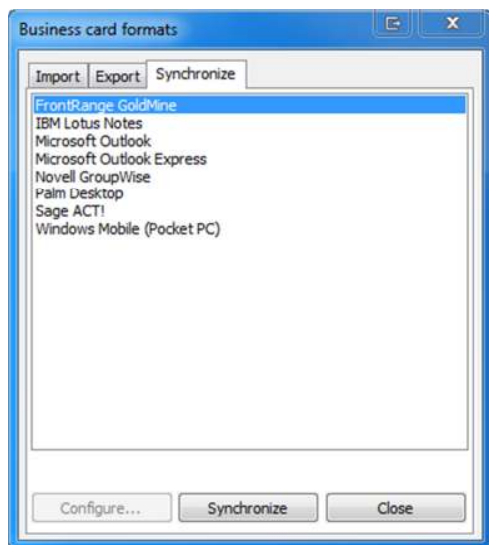
For vCard you have the option to create on file with all the contacts or multiple files with a single contact.

Note also the Export all Card check box



Synchronize

The synchronize exchanges information between the selected program and Cardiris.



If Outlook is selected all the contact in Outlook will be brought into Cardiris and all the contact in Cardiris will be sent to Outlook.

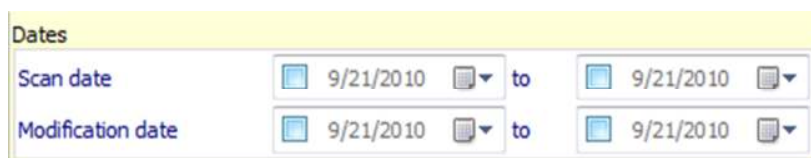
Usually this is not what you want to do unless you are looking to consolidate and reprocess the information elsewhere.

Organizing Cards

Once you have scanned in a batch of cards and exported the information and then scan in the new a problem arises of how to separate the two batches. Within the Card view are three buttons for New, Indexed, and Verified. These are used to solve this issue with all new cards automatically being assigned and color coded new.



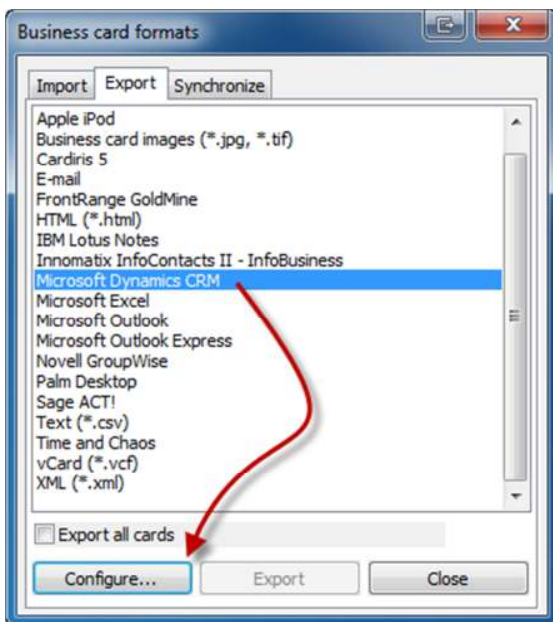
You could also use the Advanced Search by going to the Card menu > Advanced Search and specifying a scan or modification date. Only those cards in that range will be displayed and exported.



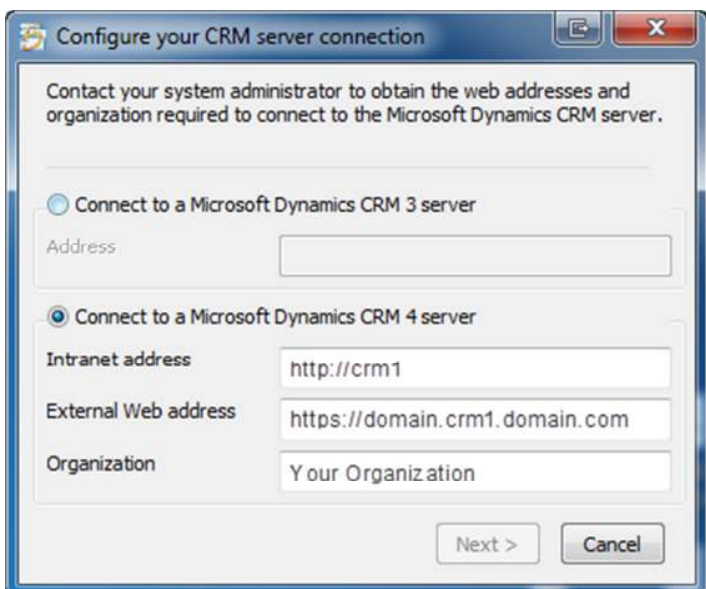
You could also simply archive to vCard and delete the cards to make room for the new batch.

Cardiris Corporate for Microsoft Dynamics CRM 5

The fundamental difference in this version is the Microsoft Dynamics CRM export option.



Highlight the Microsoft Dynamics CRM and click on configure.



You will need to fill in the configuration details for your CRM installation.

This information can be obtained from your CRM administrator.

Pictured is a sample configuration. Click next and it will connect to your server. For Remote servers allow time to establish communication.



Configure your CRM field mapping

Leads **Contacts** Accounts

First name	First Name
Last name	Last Name
Title	Job Title
Address	Address 1: Street 1
	and
	Address 1: Street 2
	and
	Address 1: Street 3
City	Address 1: City
ZIP code	Address 1: ZIP/Postal Code
State	Address 1: State/Province
Country	Address 1: Country/Region
Phone	Business Phone
Phone 2	Home Phone
Cell phone	Mobile Phone
Fax	Fax
E-mail	E-mail
Website	Web Site

In the list below select the CRM entity type to which Cardiris contacts should be mapped

Contacts

Restore Defaults

OK Cancel Apply

Next you will get the field mapping screen where the contacts in Cardiris are matched to the fields available on the server.

Click Ok and you will return to the Cardiris screen where you can click on export.



You will then get the find duplicates window. Click on the Find Duplicates button and it will show any possible duplicates.

If none click on OK and the export will proceed.

