Cardiris™ 5

User Guide

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Cardiris5-dgi-110112-04

About this guide

This guide covers the full range of functions available in Cardiris. The functions that are only available in a certain version will be indicated.

CHAPTER 1
INTRODUCING CARDIRIS

GENERAL INFORMATION ON CARDIRIS

Introduction

Cardiris is a powerful business card scanning solution and organizer. This productivity tool allows you to **scan**, **recognize** and **archive** business cards and turn them into an **address database**.

Cardiris can process business cards of any type or kind from **218** countries. By means of OCR (Optical Character Recognition) the data on business cards is extracted automatically from the image, converted into editable text and inserted in the correct database fields through field analysis. Cardiris extensively uses a knowledge database, acquiring the necessary intelligence to distinguish between first and last names, cities and states, telephone and fax numbers etc. The field analysis process is also based on the card layout, as each country has a different style of composing business cards.

The **Cardiris Asian Edition** additionally recognizes business cards from **8** Asian countries and territories: China, Hong Kong, Macau, Japan, North and South Korea, Singapore and Taiwan.

Business cards in English from the Asian countries listed above are supported by the standard version of Cardiris.

Should you encounter a business card in a language that is not supported by Cardiris, know that you can always scan the card image without OCRing it and insert in the database.

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The Cardiris database

The business cards you scan in Cardiris make up the Cardiris database. Their data can be sorted, searched, printed, exported to and synchronized with other contact managers and so on.

Cardiris smoothly complements such applications as **contact managers**, **personal information managers** (PIMs), **customer relations managers** (CRMs), **databases**, **spreadsheets** or even **word processors** whose mail merge function allow to print letters, envelopes and labels.

You can also synchronize your Cardiris database with the contacts stored on your PDA, your Windows Mobile handheld device, your Apple iPod etc.

Cardiris Corporate also allows you to exchange data with **Microsoft Dynamics CRM** and **Salesforce CRM**.

Supported scanners

Cardiris is available in a bundle version with the I.R.I.S. **IRISCard** and **IRIScan** scanners.

Cardiris is **Twain** compliant and supports a wide range of dedicated business card scanners, flatbed scanners and all-in-one devices or MFP's (multifunctional peripherals).

CHAPTER 2
INSTALLING CARDIRIS

SYSTEM REQUIREMENTS

This is the minimal system configuration required to use Cardiris:

- a Pentium-class CPU

- 256 MB RAM

- 300 MB free disk space

- Windows 7, Windows Vista (32 or 64 bits) or Windows XP

- Internet Explorer 5.01 or higher

- A free USB port to connect the IRISCard Pro or Mini

SOFTWARE INSTALLATION

How to install Cardiris

- Log on to **Windows** as administrator or make sure you have the necessary administration rights to install the software.

- Insert the **Cardiris** CD-ROM in the CD-ROM drive and follow the on-screen instructions to install the software.

- Select the installation language and click **OK**.

- Accept the terms of the license agreement.

- Click **Next** each time you are ready to go to the next screen.

- Click **Finish** to complete the installation.
  The submenu **I.R.I.S. > Cardiris** on the Windows **Programs** menu is created automatically by the installation program.
  The installation program also creates a shortcut to the Cardiris application on the Windows desktop.

UNINSTALLING THE SOFTWARE

There is only one correct way to uninstall Cardiris: by using the Windows (un)install wizard. You are strongly recommended *not* to uninstall Cardiris by manually erasing the program files.

To uninstall Cardiris:

- Close the application.

- On the **Start** menu, click **Control Panel**.

- Under the **Programs** icon, click **Uninstall** a program.

- Select **Cardiris** in the list and click the **Uninstall** button.

- Follow the on-screen instructions.

SOFTWARE REGISTRATION

Remember to register your Cardiris license.

To register:

Use the **Registration wizard** in the **Register** menu. Follow the on-screen instructions.

SEARCH FOR UPDATES

Use the **Search for Updates** function in the **Help** menu once in a while to search for the most recent updates. This helps to guarantee the proper functioning of Cardiris.

PRODUCT SUPPORT

To get technical support on Cardiris, please visit our website at **http://www.irislink.com/support**.

CHAPTER 3
GETTING STARTED

RUNNING CARDIRIS

To run Cardiris:

- Start **Cardiris** from the Windows **Start** menu or double-click the shortcut on your desktop.

- You will be prompted to register. Click **Register now** to access the registration wizard or click **Register later** and then **Cancel** to register at a later time.

- When you are using Cardiris for the first time a **sample database** will open in album view.

    Refer to the section **Tutorial** to get started with Cardiris.

CHANGING THE USER INTERFACE LANGUAGE

The user interface of Cardiris is available in a wide range of languages.

To change the user interface language:

- On the **Settings** menu, point to **User Interface Language**.

- Select the required language from the list.

  You will be prompted to restart the software.

TUTORIAL

The best way to familiarize yourself with Cardiris is by using it. This tutorial helps you get started.

Exploring the Cardiris sample database

When you launch Cardiris for the first time, the sample database provided with the software will open. It allows you to get started even if your scanner is not connected to your PC yet.

- The sample database opens in **album view**.
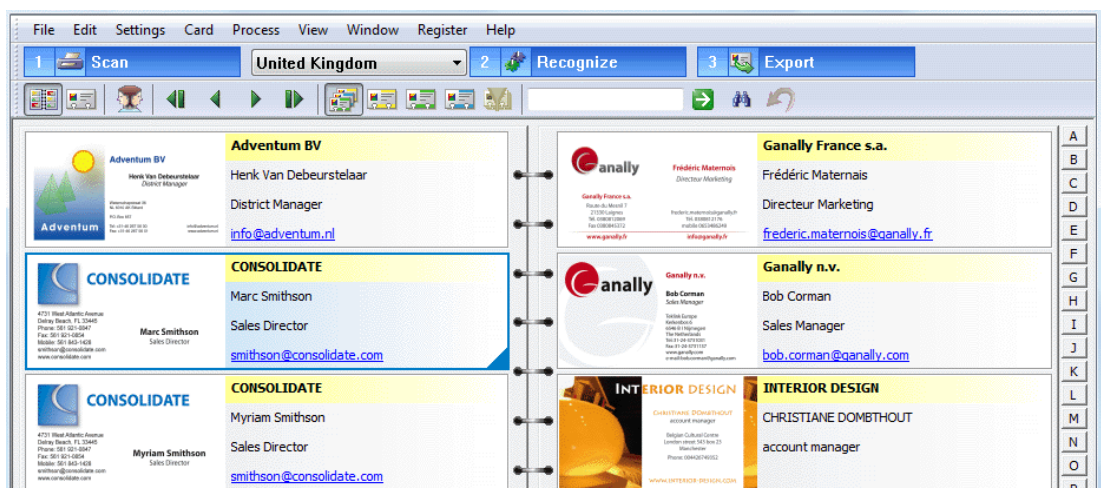
- **The first cards** in the database are displayed. You can see their image and the major data fields.

- The cards that are displayed have different colors. These colors indicate the **card status** of each business card:

  o **new cards** are yellow. The information they contain has not been verified yet.

  o **indexed cards** are green. The only information that has been verified is the company name.

  o **verified cards** are blue. All the information they contain has been verified.

- You can navigate through the business cards by clicking the **browse buttons** on the main toolbar or the **arrow buttons** at the bottom of the interface. The latter will turn the pages of the album.
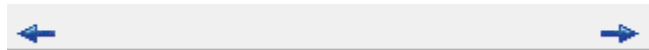
- Or click the **letter buttons** on the right-hand side: they will take you directly to the cards of the companies that start with a specific letter.
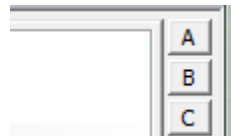
  For more information about **album view**, see the section **Album view** under **View modes**.

- Double-click one of the verified (blue) cards to switch to **card view**.

- In **card view**, the card image and **all** the data fields are displayed. Card view allows you to **verify** and **edit** the database information and **add notes** to your business cards via the **Notes** field. In card view you can also view and/or scan the **back** side of the business card and view and/or add a **picture** of your contact.
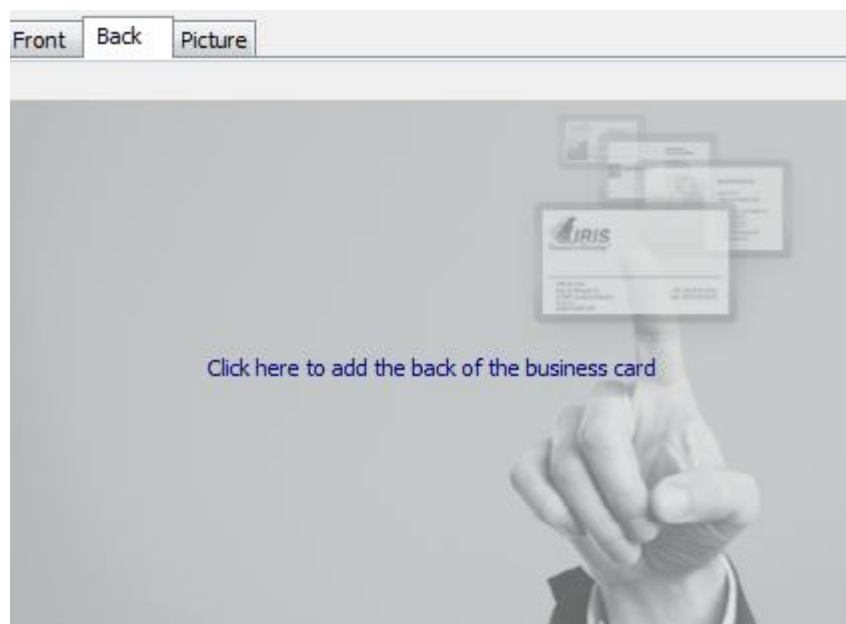
- Click the **Browse** buttons to navigate through the business cards.

For more information about **card view**, see the section **Card view** under **View modes**.

Processing sample business cards

When you double-click one of the new (yellow) cards in the sample database to view it in **card view**, you will notice that the data fields are empty.

To recognize the business card:

- Select the country of the business card in the **Card style** drop-down list.
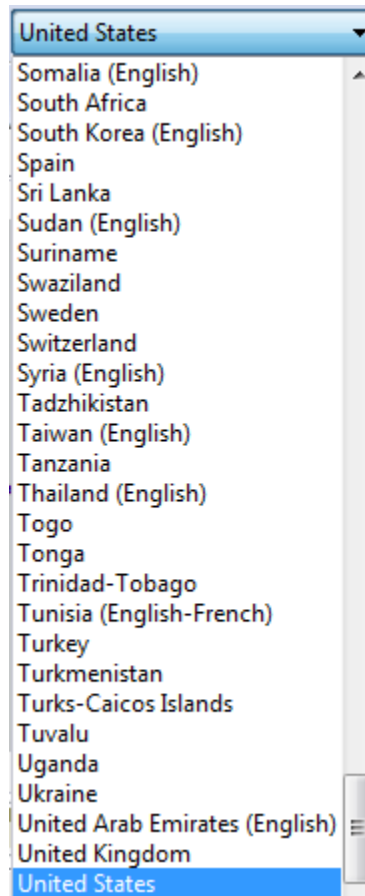
> By selecting the business card style, you not only indicate the language of the text to be recognized, you also indicate the general layout of the business card. Different countries have different styles of business cards.

- Click the **Recognize** button to start the character recognition.

2 🐞 Recognize

The image is converted into editable text and the recognized text is assigned to the various fields.

Company	**Adventum BV**
First name	Henk
Last name	Van Debeurstelaar
Title	District Manager

Address	Wetenschapstraat 36		
City	Sittard	ZIP code	6310 AK
State		Netherlands	

Phone	+31-46 267 56 00
Phone 2	
Cell phone	
Skype	
Fax	+31-46 267 56 01
E-mail	info@adventum.nl
Website	www.adventum.nl

- Check the results so far.

  If necessary you can edit the recognition results manually. You can use **cut-and-paste** and **drag-and-drop** operations to move data about. To drag data to another field, draw a frame around the data you want to move, hold down the left mouse button and drag the text to another field.

  You can also use **OCR on the fly:** click inside the field you want to send the data to. Hold down the **Ctrl** key while drawing a frame around the data you want to move. When you release the **Ctrl** key the data will be moved to the indicated field.

- When you have verified all the recognition results, click the status button **V(erified)** in the bottom left corner of the interface (or press **F12**) to indicate that the card has been verified.

Card status 'verified' (F12)

The card can now be stored in the database and may be consulted, printed, exported etc.

For more information about the card status, refer to the section **Assigning a card status**.

- Click the browse buttons in the toolbar to display other cards in **card view**.

Scanning new cards

When you want to scan new business cards, it is recommended to start a new database.

- Start a new database by clicking the **New** command on the **File** menu. Or hit **Ctrl+N**.

  A new and empty database will open.

- Connect your scanner to your PC and install any required scanner drivers or software.

- Click **Scanner** on the **Settings** menu.

  A list of available scanners will be displayed.
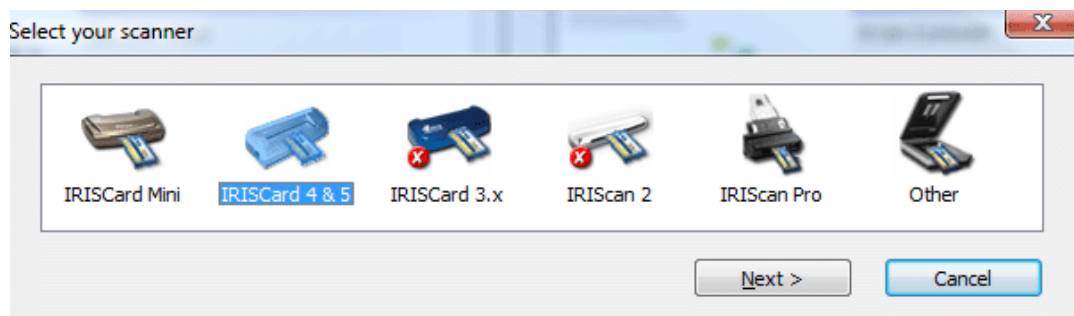
- Select your scanner in the list and click **Next**.

    A configuration screen will appear. Depending on the scanner you selected you can determine the **scanner model** and **source**, the **paper size**, **resolution** and **image type**, etc. Note that this is not the case when you select an **IRIScan** scanner. These scanners can be configured after you click the **Scan** button.

- Select the required scanner settings and click **OK** to confirm.

- Depending on your scanner you may be prompted to calibrate it.

    Insert the white calibration sheet that was delivered with your scanner and click **Calibrate**. Once the scanner has been calibrated you will be prompted to insert a card.

- When you are using a flatbed scanner and you want to scan multiple cards at a time, click the command **Detect Cards in Image** on the **Settings** menu.

    The scanned image will be split up in business cards.

- Click the **Scan** button on the main toolbar to scan your business cards.

- After you have scanned the card, just repeat the recognition process described above.

Making direct use of contacts

You can make direct use of the contacts stored inside Cardiris. You can, for instance, contact them via **e-mail**, visit their **website**, **phone** them with Skype, get **driving instructions** to their address etc.

- Double-click any card that has been recognized in Cardiris to view it in card view.

- Click the corresponding links and icons to carry out the actions listed above.

Searching contacts

The contacts you add to a Cardiris database can be consulted and searched in several ways:

- In album view you can limit the view to **new**, **indexed** and **verified** cards by clicking the corresponding status buttons on the main toolbar.

- Use the **Search** field to do free-text searches on all data fields simultaneously.

    If none of the cards meet the search criteria, the application window remains empty and the status bar confirms that there are no cards to display.
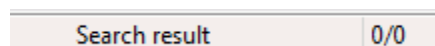
- Or click the **binoculars** icon to do access advanced search options.

    These options allow you to do searches on one or more data fields.

    Note that in advanced searches Cardiris looks for cards that *start* with a certain character string, not for cards that *contain* the character string in question.

- To display all cards after a search, click the status button **All Cards**.

Exporting contacts

The contacts you add to a Cardiris database can be exported to numerous applications.

- To start exporting contacts, select the cards you want to export and click the **Export** button on the main toolbar.

- Select the output application of your choice in the list and click **Export**.

    You can also import contacts from other applications and synchronize Cardiris contacts with those of other applications. For more information, see the sections **Importing business cards** and **Synchronizing databases**.

CHAPTER 4
VIEW MODES

ALBUM VIEW

When you open Cardiris the database that was last opened is displayed in album view. Album view is the default view mode. It displays your business cards in an album-like presentation.
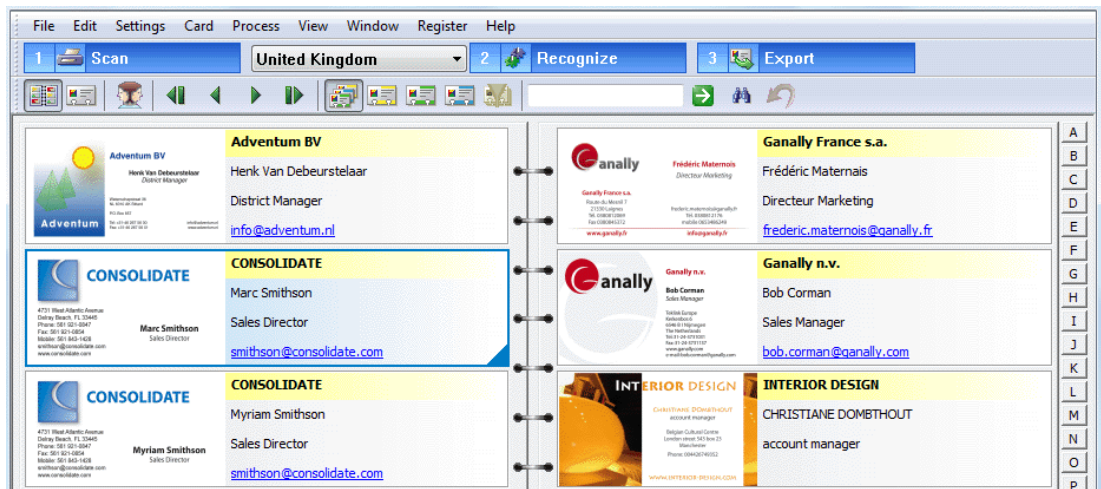
- The major **data fields** - company name, first name, name, job title and e-mail address - are listed.

- A **color code** indicates the **card status** of each card: **new cards** are yellow, **indexed cards** are green and **verified cards** are blue.

Sort order

The contacts are sorted alphabetically first by **company name**, then by **name**.

When no name is available, the contacts are sorted chronologically by scanning date.

Navigation

- Press the arrow keys on your keyboard to move through the cards. Or use the browse buttons on the main toolbar.

- Press **Home** to go to the **first card**, press **End** to go the **last card**.

- Click the **letter buttons** on the right-hand side: they will take you directly to the cards of the companies that start with a specific letter.
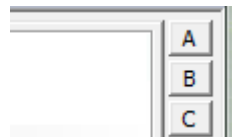
- To turn the pages of the album, use the arrow buttons in the bottom corners of the interface.
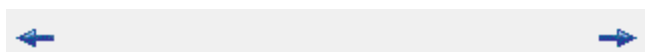
Selecting cards

- Simply click a card to select it.

- To select multiple cards, hold down the **Ctrl** key and click the cards you want to select.

- To select a continuous range of cards, click the first card and hold down the **Shift** key as you select the last card of the range.

- To select all cards, click **Select All** on the **Edit** menu. Or press **Ctrl+A**.

Recognizing, exporting, printing and deleting cards in album view

- Select one or more cards, right-click it/them to invoke the context menu and click the command you want to execute.
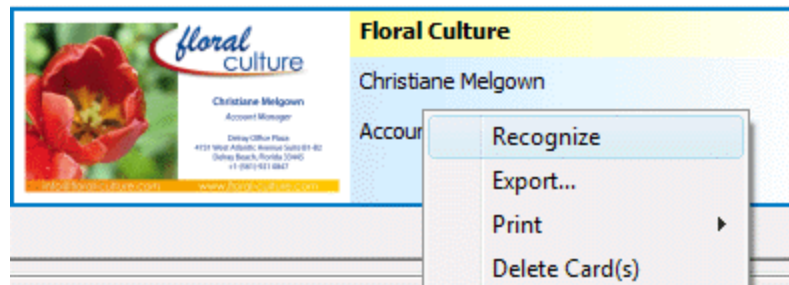
CARD VIEW

Cardiris switches to card view when you double-click a business card or click the **card view** button.

To switch back to album view, click the **album view** button.

Data fields

In **card view**, the card image and **all** the data fields are displayed. The data they contain can be **edited** in several ways. See the section **Editing the recognition results**.

The standard data fields can be complemented by **custom fields** and **categories**. See the sections **Customizing database fields** and **Assigning categories to contacts** respectively.

The **card status** is indicated in the lower right corner. See the section **Assigning a card status** for more information.
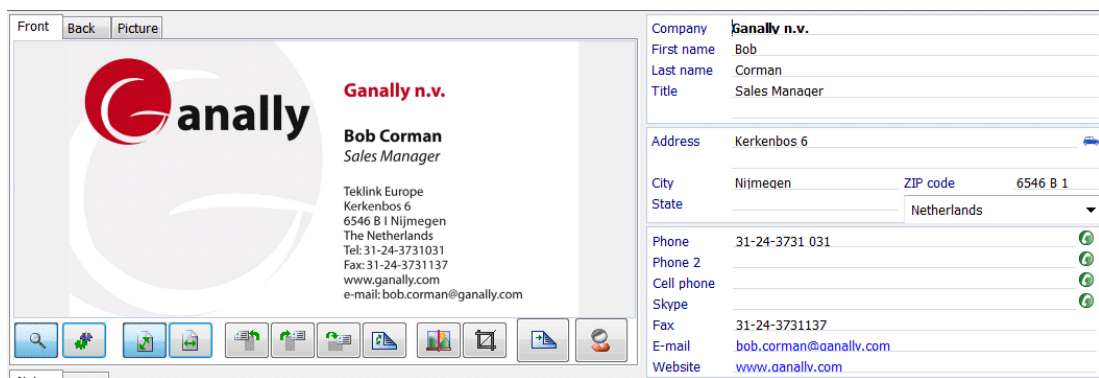
Navigation

The browse buttons allow you to navigate comfortably through the business cards.

Card image

The card image displays the image of the business card. Right-click it to **acquire** or **open** a new image or to **delete** it.

Cardiris supports color, grayscale and black-and-white images.

Back tab and Picture tab

Via the **Back** tab you can add the rear images of a business card to your contact. See the section **Scanning the back side of a card**.

Via the **Picture** tab you can add a picture of your contact. See the section **Scanning a picture of a contact**.

The button bar

The button bar contains several convenient commands:

- The **magnifying glass** allows you to zoom in on the card image. Just click inside the card image and hover over it with your mouse.

- The **drag-and-drop** button allows you to execute drag-and-drop OCR and OCR on the fly. Click it and draw a frame around the text you want to recognize. Then drag it to the required data field. Or click inside the required data field and hold down the **Ctrl** key as you draw a frame around the text. The text will be moved to the data field.

  Make sure the correct country is selected first.

  United States

Tip: you can also drag text to other applications outside Cardiris.

- Click the **fit to window** and **fit to width** buttons to display the entire business card and the entire width of the business card respectively.

- Use the **rotate** buttons to correct the orientation of your business cards if necessary.

- Use **Swap front and back images** in case you scanned the back side of a card as front side by mistake, and vice versa.

- Click the **Adjust image** button to modify the image quality.

  See the section **Adjusting card images** for more information.

- The **crop button** allows you to crop the card image. Click it and move the frames to crop the image.

- Click the **back side image** button to acquire or open the back side image of the card.

  When the back side of a card has been added the back side thumbnail will change form.

- Click the **picture button** to acquire or open a picture of your contact and add it to the database.

> When a picture has been added to the contact it will be displayed in the **picture thumbnail** on the button bar.

AutoActions

You can make direct use of the contacts stored inside Cardiris by means of the **AutoActions** buttons. You can, for instance, contact them via **e-mail** and visit their **website**. You can also phone them with **Skype** by clicking the telephone icon, and get driving instructions to their address via **Google Maps** by clicking the car icon.

CHAPTER 5
SCANNING BUSINESS CARDS

SETTING THE SCANNER SETTINGS

Before you can scan business cards with Cardiris, your scanner must be connected to your PC and configured correctly.

To configure your scanner:

- Click the **Scanner** command on the **Settings** menu.

    A list of available business card scanners will be displayed.
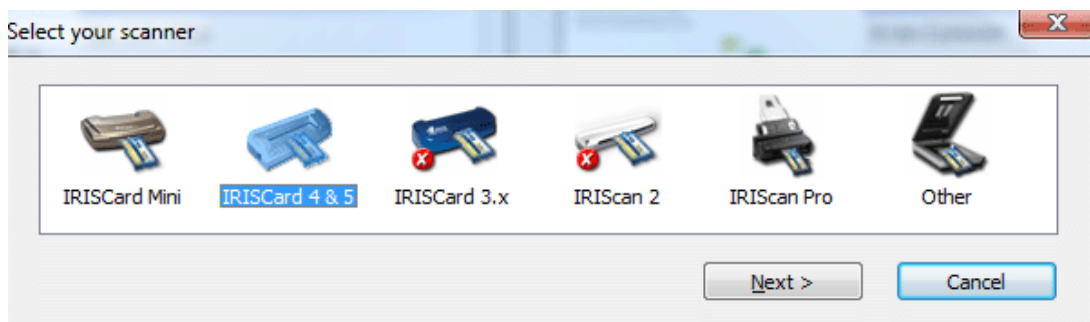
- Select your scanner in the list and click **Next**.

- When you select an **IRISCard** scanner the configuration screen will appear:

- Select the required **Paper size**, **Resolution** and **Image Type** (depending on the scanner you selected)

    Note: it is recommended to use a 400 dpi resolution to scan business cards successfully.

Cardiris scan both **landscape** and **portrait** oriented business cards. Note, however, that scanning landscape oriented cards is faster than scanning portrait oriented cards.

- If you want to scan the front and back sides of cards, select the option **Scan two-sided card**. This way the **duplex scanning mode** is activated. When scanning business cards you will first be prompted to insert the front side of your card, then the back side. (This does not apply to IRISCard Mini)
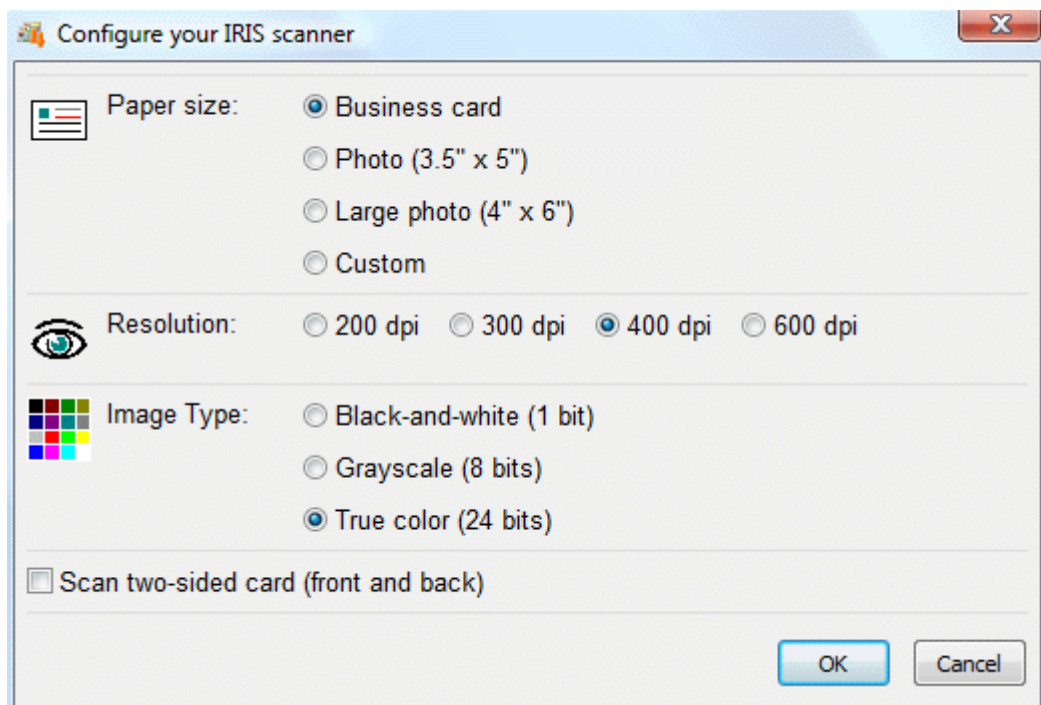
- When you select an **IRIScan** scanner no configuration screen will be displayed. The **IRIScan** settings must be set after you click the **Scan** button.

- When you select another type of scanner a different configuration screen will appear.
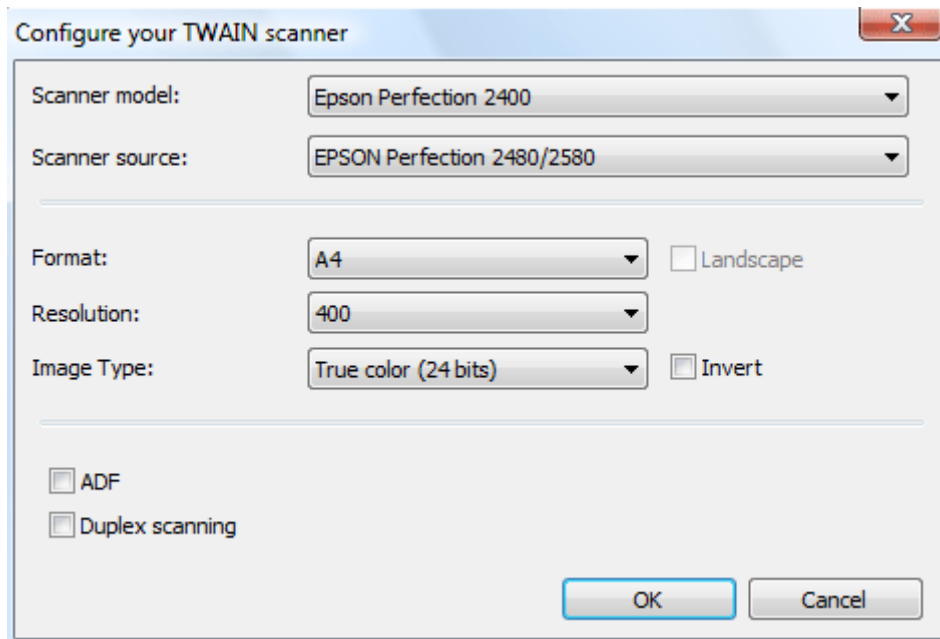
o Select your **scanner model** and indicate the **scanner source**.

o Select the required **Format**, **Resolution** and **Image Type**.

   Note: it is recommended to use a 400 dpi resolution to scan business cards successfully.

o When your scanner is equipped with a document feeder, select the **ADF** (automatic document feeder) function.

o Select **Duplex scanning** to activate it.

   Note that this option will only be available for duplex scanners.

SCANNING CARDS

With Cardiris you can either scan business cards or open already existing image files.

Cardiris is **Twain** compliant and supports a wide range of dedicated business card scanners, flatbed scanners and all-in-one devices or MFP's (multifunctional peripherals).

To open existing image files:

- Click **Load card images** in the **File** menu and search for the image files you want to open.

    Cardiris is able to open images of various types: JPEG images, Paintbrush (PCX) images, PNG ("Portable Network Graphics") images, (non-compressed, packbits, d2read and Group 4 compressed) TIFF images and Windows bitmaps (BMP) are supported.

To scan business cards:

- Click the **Scan** button on the main toolbar.

    Make sure your scanner is connected and the right scanner settings are selected. See the section **Setting the scanner settings** for more information.

    When you are using an IRISCard scanner for the first time you will be prompted to calibrate it. Insert the white calibration sheet that was delivered with your scanner and click **Calibrate**.

    When you are using an IRISCard Pro scanner, you can also use the two scanner buttons to scan cards. For more information, see the section **Scanning cards with the IRISCard Button Manager**.

Scan settings

When scanning business cards Cardiris can apply multiple scan settings. The scan settings are available in the **Settings** menu.

    Note: do not confuse the **scan settings** with the **scanner settings**.

Several scan settings are applied by default:

- Cardiris **detect the text orientation**.

  This option detects the text orientation on the cards and automatically rotates cards that have been scanned at a 90°, 180° or 270° angle in the correct direction.

  Know that you can always rotate cards manually in card view using the rotation buttons, should this be necessary.

- Cardiris **crops business cards** after scanning.

  Any borders around the business cards are removed.

  Tip: leave this option enabled at all times! **Business card scanners** tend to create a black border around the card image.

  Note: if you are not satisfied with the automatic cropping, know that you can always crop business cards manually in card view. To do so, click the crop button on the button bar and move the frames to the appropriate size. Then click the **Crop** command.

- The **ViewGray** option ensures optimal legibility for business cards scanned in black-and-white.

Besides the default settings Cardiris can also:

- **Detect cards in image**.

  Use this option when you are using a flatbed scanner. You can place multiple business cards on your scanner's flatbed and Cardiris will split up the image in different business cards, throwing away the superfluous black or white borders.

  When you are using a card scanner, use the default option **Single card**.

- **Recognize cards after scanning**.

  When the option **Recognize after Scanning** has been selected, Cardiris starts the recognition process immediately after scanning. Make sure you select the correct country in the drop-down list before scanning your cards.

  This option is useful when you are scanning many business cards of the same country. Note that you can only select a single card style at a time.

- **Recognize back side after front side**

  When this option is enabled, you can also recognize the back side of cards, after recognizing the front side.

  This option is useful in combination with the option **Recognize cards after scanning** when scanning double-sided cards. This way, you scan and recognize the front side and are prompted to do the same for the back side.

Note, however, that both sides of the card need to be in the same language.

SCANNING CARDS WITH THE IRISCARD SCANNERS

With the **IRISCard Mini** and **IRISCard Pro** scanners you can scan one business card after the other.

Operation

- Insert a business card in the IRISCard and click the **Scan** button on the main toolbar.

    When you are using an IRISCard Pro scanner, you can also use the two scanner buttons to scan cards. For more information, see the section **Scanning cards with the IRISCard Button Manager**.

- When you are using the IRISCard for the first time you will be prompted to calibrate it. Insert the white calibration sheet that was delivered with your scanner and click **Calibrate**.

Should you need to recalibrate your scanner:

- Click **Scanner** on the **Settings** menu.

- Then click **Reset calibration** in the window that appears.

- The next time you hit the **Scan** button you will be prompted to calibrate your IRISCard again.

    You are recommended to recalibrate your IRISCard scanner on a regular basis.

    See the section **Setting the scanner settings** and **Scanning cards** for more information about the **scanner** and the **scan settings**.

SCANNING CARDS WITH THE IRISCARD BUTTON MANAGER

When you are using an IRISCard Pro scanner a small utility is installed in combination with Cardiris: the **IRISCard Button Manager**.

This utility allows you to use your IRISCard scanner without launching the Cardiris software first.

To access the Button manager:

- Double-click the **Button manager icon** on the task bar.

Note: when the IRISCard scanner is not connected to your pc, the button manager icon will crossed out.

- Configure the scanner buttons:

Left button

By clicking the left button on your scanner you can either send your business card images by **e-mail** or save them as **image files**.

When you select **e-mail** and click the left scanner button, Cardiris will open a new e-mail message in your default e-mail software and add the business card image as attachment.

When you select **image file** and click the left scanner button, a **Save Graphics** window will open. Enter the file name, choose the file type and save it in the required location. As soon as you click **Save** Cardiris will scan the business card and store it in the location you selected.

Right button

By clicking the right button you launch the Cardiris software and automatically scan your cards.

Click the **Settings** button to determine the scanner settings. For more information, see the section **Setting the scanner settings**.

LOADING IMAGES FROM THE IRISCAN AND IRISCARD ANYWHERE SCANNERS

(This section applies to IRIScan Anywhere 2 and IRISCard Anywhere 4)

When you use Cardiris in combination with an **IRIScan Anywhere 2 scanner** or an **IRISCard Anywhere 4 scanner**, you can scan your business cards anywhere you want without needing a computer and load them into Cardiris at a later time.

Operation

*   If you decide to use an external storage device (SD memory card or USB flash drive) to store your scans, insert it into the scanner.

*   Scan your business cards with your **IRIScan Anywhere 2 scanner** or **IRISCard Anywhere 4 scanner**.

    For information on how to use these scanners correctly, refer to the scanners' **Quick User Guides** or **User Guides:**

    The paper **Quick User Guide** can be found in the package box.

    The electronic **User Guide** can be accessed from the Windows **Start** menu > **All Programs** > **I.R.I.S.** > **IRIScan/Card Anywhere** > **IRIScan/Card Anywhere-English.pdf.**

- In case you stored your documents on an external storage device (SD memory card or USB flash drive), insert the storage device into your computer.

- In case you used the scanner's internal memory to store your documents, power on the scanner and connect it to your computer.

- Open the **Cardiris** interface. A message will appear, prompting you to load the images from your scanner into the current database.

- Click **Yes** to load the images.

  To load images at a later time, click **No**.
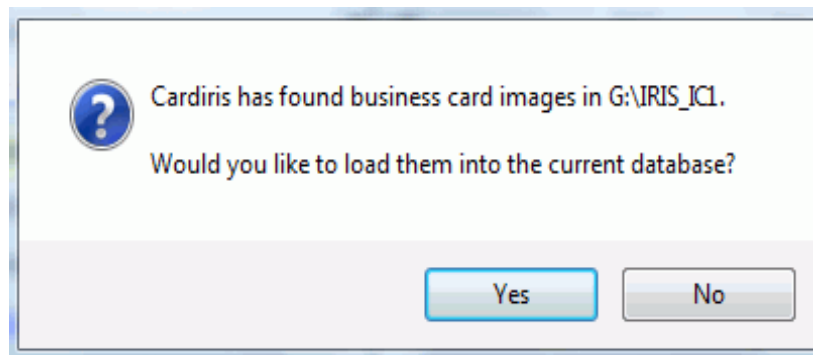
Loading images at a later time

- To load images at a later time, click the down-arrow right of the **Scan** button.

- Then select **Load**. The **Load** button will be displayed on the main toolbar.

File Edit Settings Card Process View Window Register Help

1 📁 Load ▾ | United States ▾ | 2 🔧 Recognize | 3 📇 Export
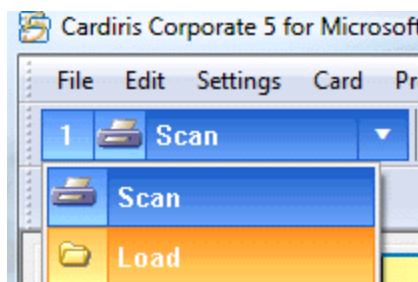
- Click the **Load** button and browse for the images you want to load.

SCANNING CARDS WITH A FLATBED SCANNER

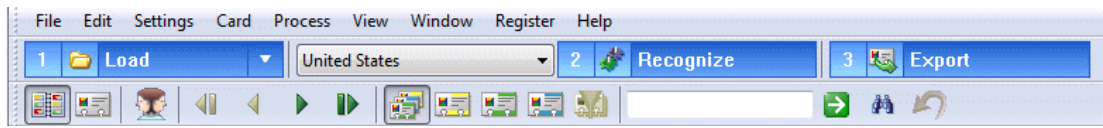When using a flatbed scanner you can scan multiple business cards at a time: you can place multiple business cards on your scanner's flatbed and Cardiris will split up the image in different business cards, throwing away superfluous black or white borders.

Operation

- Click the command **Detect Cards in Image** on the **Settings** menu.

    If you forgot to enable this function, click **Extract card(s)** on the **Process** menu.

- Put the cards on your scanner's flatbed. In order for Cardiris to segment the cards correctly, a number of conditions must be met:

    o the scan background must be clean and preferably **black**;

Tip: scan the cards with the scanner lid open to create a black background.

    o the distance between the cards must be at least **2 cm**;

    o the scanned cards must be **aligned** with one another;

- o cards must either be **portrait** or **landscape** oriented. Avoid scanning a combination of portrait and landscape oriented cards.

- Click the **Scan** button on the main toolbar.

  The image will be split up in business cards.

SCANNING BATCHES OF CARDS

Cardiris is able to process large batches of cards and supports scanners equipped with an automatic document feeder. When the automatic scanning option (**ADF**) has been enabled in Cardiris, all you have to do is insert cards in your scanner's document feeder and hit the **Scan** button.

To activate the automatic scanning option:

- Click **Scanner** on the **Settings** menu.

- Select **Other** and click **Next**.

- Select your scanner from the list and click the **ADF** option.

- Any cards you enter in your scanner's document feeder will be processed one after the other as soon as you click the **Scan** button.

When you are using the **IRISCard Pro** or **IRISCard Mini** scanners to scan batches of cards, there are no special options to select. Simply click the **Scan** button once. After the first card has been scanned, you will be prompted to insert another card. Cardiris will process one card after the other.

> **Tip**: the cards you scan in batch can be recognized in batch as well. Click the command **Batch OCR** on the **Process** menu. Any new cards that have been added to the database will be recognized.

SCANNING CARDS FROM WITHIN MICROSOFT OUTLOOK

(This section applies to IRISCard Pro and IRISCard Corporate)

When you install Cardiris on your PC and Microsoft Outlook is already installed, a Cardiris toolbar will be added to the Outlook interface. Via this Cardiris toolbar you can scan business cards, recognize them and store them as Outlook contacts. This way, you can scan your business cards even without the Cardiris interface being displayed.
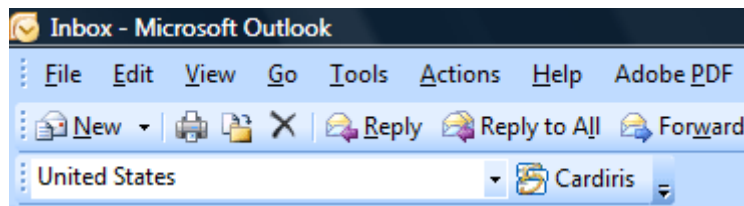
To scan cards from within Microsoft Outlook:

- Open **Microsoft Outlook** from the Windows **Programs** menu. Or click the icon on your desktop.

    Cardiris supports Microsoft Outlook 2003 and 2007.

- On the **View** menu point to **Toolbars** and then click **Cardiris**.

The Cardiris toolbar will be displayed.

- Select the correct country in the drop-down list and click the **Cardiris** button to scan your business cards.

    Make sure your scanner is connected to your PC and configured properly.

    When you are using the IRISCard you will be prompted to insert your cards in the scanner.

- Cardiris will recognize the business card, open an **Outlook contact form** and fill in all recognized fields.

- Click **Save** to save the contact.

    The contact will be saved to the **default contacts folder** of Outlook.

    Note: contacts can be saved to other Outlook contacts folders as well. Simply open the contacts folder you want to store your contacts in and go through the scan process. Cardiris will save the contacts to the contacts folder that is opened.
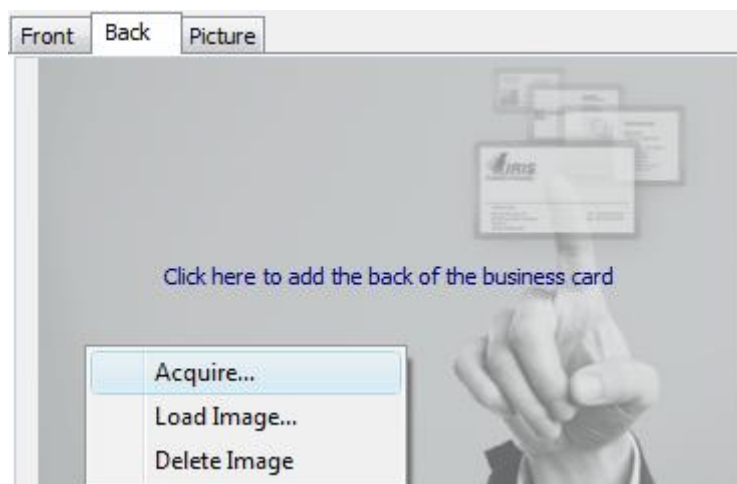
SCANNING THE BACK SIDE OF A CARD

Sometimes business cards contain additional information on the back side, such as private telephone numbers, logo's etc. Therefore, Cardiris allows you to scan the back sides of cards and add the information to the database.

To scan the back side of a card:

- First scan the front side by clicking the **Scan** button.

- Then click **Scan back of Card** on the **Process** menu.

  You will be prompted to enter a card.

- Or click the **Back** tab and click inside grayed picture.

  - Click **Acquire** to scan the back side.

  - Or click **Load** image to open an existing image file.

When the back side of a card has been added the standard **back side thumbnail** on the button bar will change form.

If you also want to recognize the back side: while on the **Back** tab, click **Recognize** on the main toolbar . The information will be extracted from the back side and added to the relevant database fields. Note that the information extracted from the back sides of cards will not replace the info from the front side, but it will **complement** it.

2 Recognize

Tips:

In case you want to recognize the back sides of cards automatically, select the option **Recognize back side after front side** in the Settings menu. This way, you only need to click the Recognize button once to recognize both sides of the cards.

Should the necessary information not be extracted from the back side after recognition, note that you can still use **drag-and-drop OCR** and **OCR on the fly** on the back side of cards to add additional information to the database fields.

When you always want to scan both the front and back side of cards, make sure you activate **Duplex scanning**.

DUPLEX SCANNING

(This section does not apply to IRISCard Mini)

Cardiris allows you to scan both the front and the back side of all your business cards by means of the **Duplex scanning** mode.

To activate duplex scanning:

- Click **Scanner** on the **Settings** menu.

- Select your scanner and activate the option **Duplex scanning** in the configuration screen.

- Then click the **Scan** button on the main toolbar.

SCANNING A PICTURE OF A CONTACT

Next to the card image, you can also add a picture of your contacts to the Cardiris database.

To scan a picture of your contacts:

- If the card you want to add a picture to is already in the database, double-click it to open it in **card view**.

- If not, click the **Scan** button to scan the front side of the card.

- Then click **Scan Picture** on the **Process** menu.

   You will be prompted to insert a picture.

- Or click the **Picture** tab and click inside the grayed picture.

   o Click **Acquire** to scan the picture.

   o Or click **Load image** to open an existing image file.

Tip: avoid loading heavy pictures. A resolution of 75 dpi is sufficient for on-screen display.
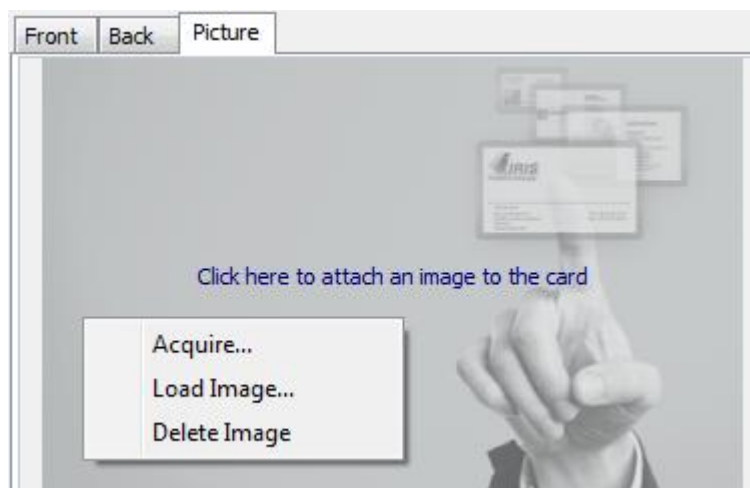
- When a picture has been added to the contact it will be displayed in the **picture thumbnail** on the button bar.

ADDING NOTES TO CARDS

When you are scanning a stack of cards you collected during one particular event, e.g. a trade show, it may be useful to add personal notes to those cards, reminding you where you met your contacts.

To add automatic notes to cards:

- On the **Card** menu, click **AutoNote**.

- Select **Insert this AutoNote** and type in the text you want to add.

    The text you enter will be added to the **Notes** field of every card you scan.

    To disable this option click **No AutoNote**.

You can also add notes manually cards. To do so:

- Double-click a card to open it in **card view**.

- Click the **Notes** tab and enter any text you want to add.

MANUALLY ADDING CARDS TO THE DATABASE

Next to scanning business cards, Cardiris also allows you to add cards manually to the database. This comes in handy when you don't have your (business card) scanner near you.

To add a card to the database:

- Click **New** on the **Card** menu. Or hit **Ctrl+E**.

    A new card will be added to the database and opens in card view.

- Fill in the database fields manually.

    Any cards you manually add to the database have the card status **Verified**, as you are supposed to enter the correct information.

To add the front image, back image or picture of the card later on:

- Click the tabs **Front**, **Back** or **Picture** and click inside the grayed picture.

- Then click **Acquire** to scan or click **Load Image** to open an existing image file.

CHAPTER 6
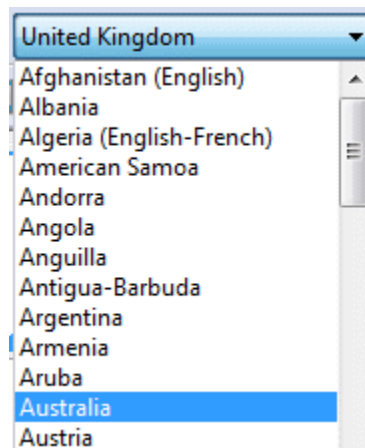# RECOGNIZING BUSINESS CARDS

SELECTING THE CARD STYLE

Cardiris uses field analysis to attribute data on business cards to the correct database fields. The field analysis technology is, amongst others, based on the card style, or layout, of business cards. Each country has a different style of composing business. That's why it is critical that you select the right country before recognizing your business cards.

To do so:

- Click the **card style** drop-down list and select the right country.

    Some card styles correspond to several languages. Belgium, Canada and Switzerland for instance all have multiple official languages. Cardiris detects the selected language automatically.
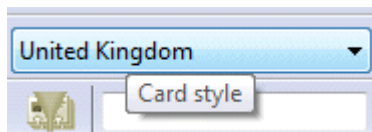
Note that you can only select a single card style at a time.

Tip: organize your business cards per country while scanning them. That way, you can perform **Batch OCR** on them afterwards.

RECOGNIZING THE CARDS

As soon as you have scanned your cards and you selected the correct **card style**, you can execute the recognition on your business cards.

To do so:

- Simply click the **Recognize** button on the main toolbar.

> The card data is extracted from the card image and attributed to the correct data fields.

> **Tip**: if you forgot to select the correct country, select it afterwards and click the **Recognize** button again.

- Double-click the recognized card to view the results in card view.

Any data Cardiris cannot attribute to a database field is put in the **Extra** field.

Unrecognized characters are represented by a tilde (the "~" symbol").

- The recognition results can edited in several ways. See **Editing the recognition results**.

Note: when you re-execute the recognition on cards that have already been recognized, Cardiris will perform different operations depending on the **card status**:

- Cards that have the status **New** will be recognized again. The data they already contain will be erased and filled out again.

- Cardiris will try to complete any missing fields of **Indexed** cards.

- Cardiris will not execute the recognition again on **Verified** cards.

RECOGNIZING BATCHES OF CARDS

When scanning batches of cards it may be useful to also recognize them in batch, instead of performing the recognition on each card

separately. This way, you can reduce the processing time considerably.

To recognize batches of cards:

- Sort all the cards you want to process by country and **scan** them.

  Sorting cards by country is essential as you can only select one card style at a time.

- Then click **Batch OCR** on the **Process** menu.

  Note that the command **Batch OCR** is disabled when you are viewing a card in card view. If necessary, click the **album view** button to return to album view.

- Batch OCR takes the **card status** of cards into account while executing the recognition:

  o Cards that have the status **New** will be recognized. Any data that had already been filled in will be erased and filled in again.

  o For **indexed cards**, the system will try and fill out all empty data fields - all fields which already contain data are considered validated by the user.

  o Batch OCR will not be executed on **verified cards**.

  For more information about card statuses, see the section **Assigning a card status**.

You can also batch OCR a selection of cards:

- **Ctrl**-click a selection of cards in album view and click the **Batch OCR** command on the **Process** menu.

- Or right-click the selection and click **Recognize** in the context menu.

# RECOGNIZING THE BACK SIDE OF CARDS AUTOMATICALLY

Sometimes business cards contain useful information on the back side, such as additional contact information, private telephone numbers, logo's, etc. That's why with Cardiris you can recognize the back side of your business cards automatically, immediately after you recognize the front side.

> **Note**: the information that is extracted from the back sides of cards does not replace the info from the front side, but **complements** it.

> **Note**: back side recognition only works if the back side of the card is written in the same language as the front side.

To recognize the back side of cards:

- On the **Settings** menu, select the option **Recognize back side after front side**.
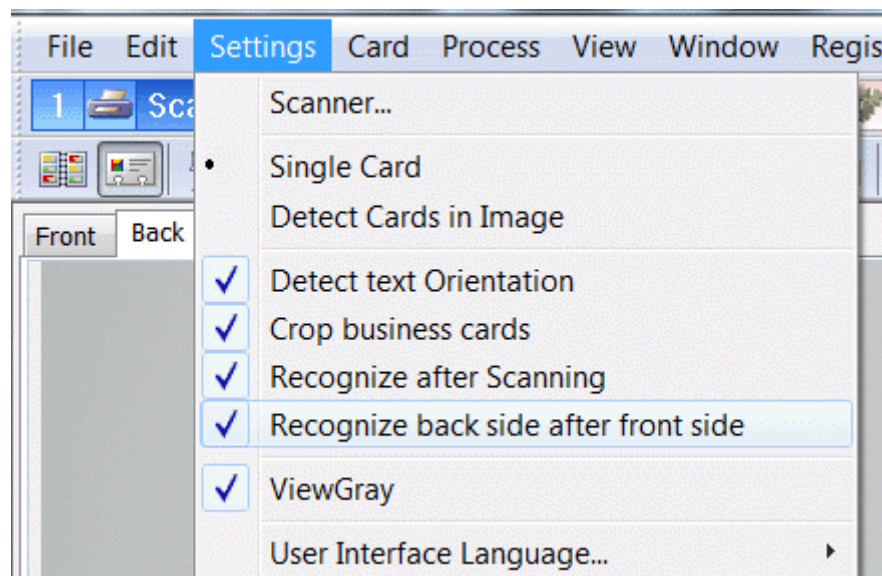
- Then click **Recognize** on the main toolbar. Cardiris will first recognize the front side of the card and add its data to the database fields. Then, it recognizes the back side and adds the additional information.

> **Tip**: in case you scanned a front side as back side and the other way around, just click the **Swap** icon beneath the card image (in **Card view**). The front and back images will be swapped.

EDITING THE RECOGNITION RESULTS

Once the **recognition** is completed, the recognition results can be edited in several ways should this be necessary:

- You can click in any of the database fields to modify the text.

- You can move data about by selecting it and dragging it to another field.

- You can also use cut-and-paste actions to move data.

Right-click in the database fields to discover handy editing commands.

Any changes you make to the recognition results are saved automatically. There is no need to hit a **Save** button. In card view, typing is saving. The changes you make to the card that is currently displayed can be undone, however:

- click the **Undo** command on the **Edit** menu to undo the last change you made;

- or click the **Restore** icon to undo all changes you made to the card and restore it to its original state.

Additional information can be added manually to the fields **Notes** and **Extra**.

Next to these 'regular' ways of editing, Cardiris allows you to perform **Drag-and-drop OCR** and **OCR on the fly**.

Drag-and-drop OCR

Any data that Cardiris did not extract from a business card can be added to the database fields by means of **drag-and-drop OCR**:

- Click the **drag-and-drop** button on the button bar.

- Drag a frame around the text you want to add and drag that frame to the required database field.

OCR on the fly

Any data that Cardiris did not extract from a business card can also be added to the database fields by means of **OCR on the fly**.

- Click inside the data field you want to add data to.

- Hold down the **Ctrl** key and drag a frame around the text you want to add.

- Release the **Ctrl** key. The text will be added to the field.

In Cardiris you can not only edit the recognition results, you can also **customize the database fields**. See the section **Customizing database fields** for more information.

ADJUSTING CARD IMAGES

During recognition Cardiris converts cards scanned in color or grayscale into binarized (black-and-white) images, on which it performs the OCR. When opening or scanning extremely light or extremely dark grayscale and color images, it may be necessary to adjust the binarized images before executing the recognition, in order to obtain satisfactory OCR results.

Operation

- **Scan** the card you want to recognize.

- Click the **Adjust image** button on the button bar.

- The preview window will open displaying the binarized image and the adjustment options.
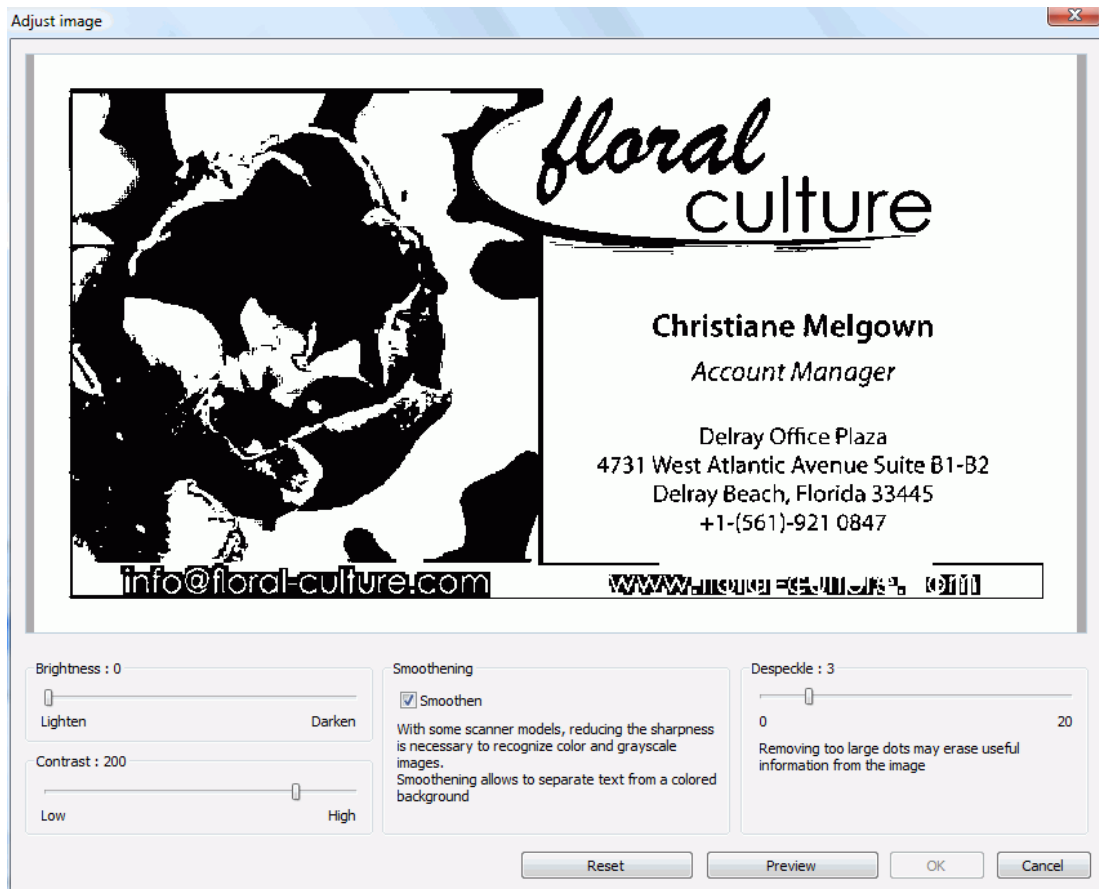
Adjustment options:

Smoothening

    o Select **Smoothen** to even out the image.

This option renders grayscale and color images more homogeneous by smoothening out differences in intensity. As a result, a stronger contrast is created between the foreground (text) and background (artwork).

Note: sometimes smoothening is the only way to separate text from a colored background.

Brightness

    o Use the slider to increase or decrease the **Brightness**.

The **Brightness** settings determine the overall brightness of the image. Use these settings to darken or lighten the image when the text is illegible.

Contrast

- o Use the slider to increase or decrease the **Contrast**.

The **Contrast** settings determine the contrast between darker and lighter zones of an image. Use these settings to make character shapes stand out against a colored background.

Despeckle

- o Use the slider to increase or decrease the **Despeckle** options.

Despeckling removes small spots from black-and-white images.

- Click **Preview** to preview the results.

- If the results are satisfactory, click **OK**. If not, change the settings again.

- Then click **Recognize** to recognize the card.

CUSTOMIZING DATABASE FIELDS

When recognizing business cards, Cardiris extracts the data from the cards and attributes it to a list of standard data fields. The standard fields are complemented by a number of custom fields that allow you to add additional information. You can, for instance, add the location where you met your contact, the hours when to reach him/her etc.

The default custom fields can be extended with an unlimited number of other custom fields.

To add a custom field to a card:

- Open the card in **card view**.

- Click the + sign next to **Custom Fields**. Or click **Custom fields** on the **Edit** menu.

- Click **Add** and enter the name of the custom field.

  Note: avoid using semi-colons (;) and vertical bars (|) both in the custom field name and in the content. These characters are forbidden.
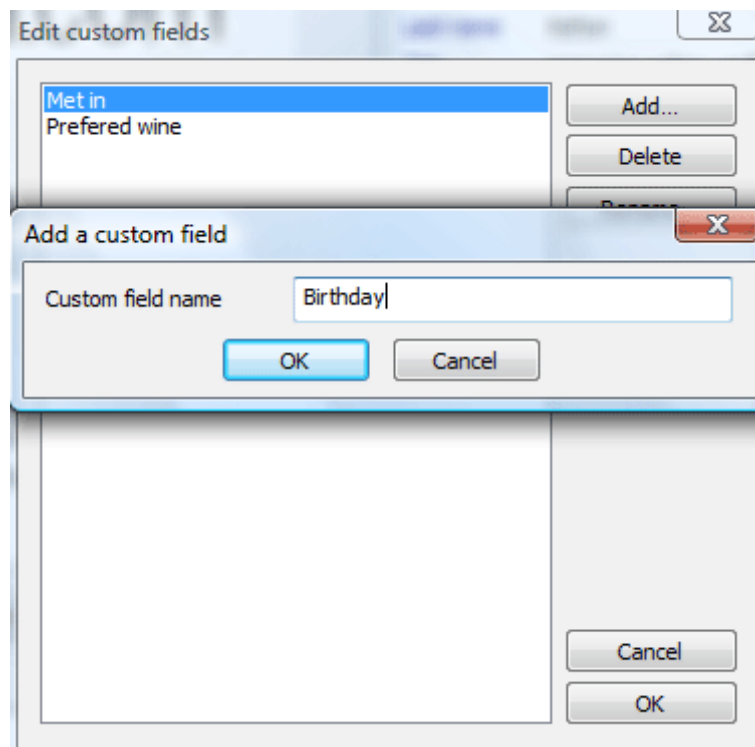
- Then click **OK** to confirm.

  The custom field will be added to the standard database fields.

> The content of a custom field can be edited and searched like any other standard field.
>
> Note that custom fields are not displayed in album view. Only the 'major' database fields are.

- To rename or delete any custom fields, click the + sign again and click **Rename** or **Delete**.

Custom fields are also available for export. They can be exported as cvs, xml, html and excel files and sent to Microsoft Outlook 2003 and 2007. When exporting to Microsoft Outlook, the custom fields are exported to the **Notes** fields of Outlook contacts.

When exporting contacts that contain custom fields to **Microsoft Dynamics CRM**, the custom fields are added to **Notes** field in MS Dynamics CRM.

When exporting contacts that contain custom fields to **Salesforce CRM**, the custom fields are added to the **Description** field in Salesforce.

Note: custom fields are an intrinsic part of a Cardiris database. When you merge two databases, the custom fields from both databases will be added up. In other words, the merged database will contain both the custom fields from the first database as well as those of the second database. Duplicate custom fields will be merged into a single one.

Besides custom fields, you can also assign an unlimited number of **categories** to your contacts.

ASSIGNING CATEGORIES TO CONTACTS

Besides **custom fields**, you can also assign an unlimited number of **categories** to your contacts. Assigning categories to contacts helps

you find them faster later on, by means of the **advanced search** option.

> For more information on advanced searching, see the section **Searching business cards**.

To add categories to contacts:

- Open a card in **card view.**

- Click the + sign next to **Categories**. Or click **Categories** on the **Edit** menu.

- Select the categories you want to assign from the list.
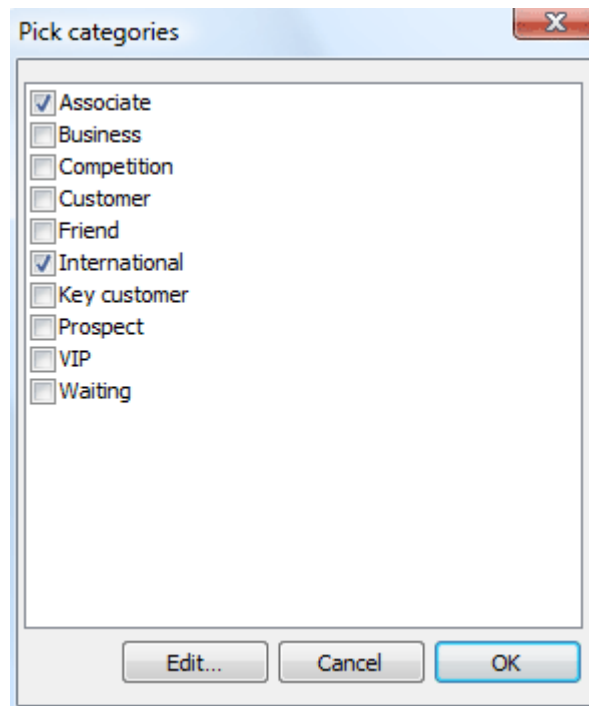
- This list of standard categories can be extended by an unlimited number of categories: click **Edit** and then **Add** to add new categories.

> Note: avoid using semi-colons (;) and vertical bars (|) in category names. These characters are forbidden.

Categories are also available for export. They can be exported as cvs, xml, html and excel files and sent to Microsoft Outlook 2003 and 2007. When exporting to Microsoft Outlook, the categories are created on the fly in Microsoft Outlook as far as they don't already exist.

Note: categories are an intrinsic part of a Cardiris database. When you merge two databases, the categories from both databases will be added up. In other words, the merged database will contain both the categories from the first databases as well as those of the second database. Duplicate categories will be merged into a single one.

Note: when exporting contacts that contain categories to **Microsoft Dynamics CRM**, the categories will be added to the **Notes** field in **CRM 3**, **4** and **2011 Server** and in the **Notes and Activities** section in **CRM Online**.

Note: when exporting contacts that contain categories to **Salesforce CRM**, the categories will be added to the **Description** field in Salesforce.

CHAPTER 7
ORGANIZING BUSINESS CARDS

ASSIGNING A CARD STATUS

When you open the **sample database**, which you'll find in the **Cardiris installation folder**, you will see that the cards in the database all have a certain color code. Cards can be **yellow**, **green** or **blue**.

These colors indicates the card status of a card:

- Yellow cards are **New cards**.

  The data they contain has not been verified yet.

- Green cards are **Indexed cards**.

  Indexed cards are cards of which the company name has been checked by the user.

- Blue cards are **Verified cards**.

  Cards are **Verified** when all the information they contain has been checked by the user.

To assign a different card status to a card:

- Double-click the card to view it in **card view**.

- Check the recognition results and **edit** them if necessary.

- Click the status buttons in the lower right part of the interface: **N**(ew), **I**(ndexed), **V**(erified).

    Or use the function keys **F10**, **F11** and **F12** on your keyboard.

Based on the card status you can choose to display a selection of cards:

- In album view click the **card type** buttons on the main toolbar to display new cards, indexed cards and verified cards only, respectively.

- The status bar at the bottom of the windows indicates the card types that are displayed.

- Depending on the card types that are displayed, the Cardiris database will be displayed in a different color.

  In the image below Cardiris only displays verified cards.

- When there are no cards to display:

  o the application window remains empty and the status bar confirms that there are no cards to display. (album view)

  o the card image is empty, no data fields are filled out and the card status is grayed. (card view)

- To redisplay all cards, click the **all cards** button.

Notes:

When exporting cards to other applications, make sure you only export **verified** cards. This way you are sure to export only information that has been checked.

When you **resolve duplicates** in Cardiris, the cards you merge automatically get the status **verified**.

When you use the option **Clear all fields but Notes** (on the **Edit** menu) on a card, the card status changes to **new**.

BROWSING THROUGH THE CARDS

Cardiris functions like an electronic rolodex. The cards you add to the database can be browsed easily:

- In album view click the arrows in the bottom corners of the interface to turn the pages of the album.
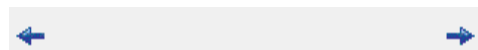
  Or press **PageUp** and **PageDown** on your keyboard.

- The **browse** buttons allow you to navigate through the business cards.

- In album view press **Home** to go to the first card and press **End** to go to the last card.

- In album view you can also navigate through the cards by clicking the letter buttons.

Example: Click the "G" button and the cursor moves to the first card whose company name starts with the letter "G". If there are no companies in the database that start with that letter, Cardiris moves to the card whose company name is closest to that letter.
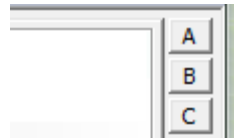
Sort order of cards

Cardiris applies a **sort order** to the cards in a database:

- Cards are first sorted alphabetically by **company name**.

   The company name is the primary sort key.

- Then they are sorted alphabetically by **name**.

   The name is the secondary sort key when there are multiple contacts of the same company in a database.

- When nor their company name nor their name is available, cards are sorted chronologically by **scanning date**.

SEARCHING BUSINESS CARDS

Cardiris offers two search functions to search your business cards quickly and efficiently:

- You can do **free-text searches** using the search field.
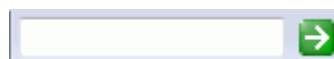
- Or do **advanced searches** with the **advanced search command**.

Free text search

To do a free text search:

- Enter a term in the search field and click the **search cards** button or press **Enter**.
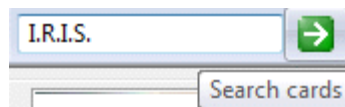
- Cardiris will display all cards that match the search criterion. The filter button, the status bar and the pink background indicate that you're displaying a "hitlist". The status bar also indicates the number of cards that have been found.
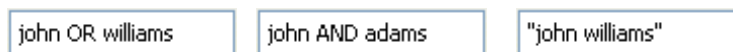
  If none of the cards meet the search criteria:

  - the application window remains empty and the status bar confirms that there are no cards to display. (album view)

  - the card image is empty, no data fields are filled out and the card status is grayed. (card view)

- Logical operators such as OR and AND, and also quotation marks can be used to broaden the search.

- To redisplay all cards after a search, erase the search term and press **Enter** or click the button **All cards** on the button bar.

Advanced search

To do an advanced search:

- Click the **binoculars** icon on the main toolbar.

- Cardiris displays the list of available search criteria.

  > The search criteria allow you to limit searches to specific data fields,
  > custom fields and categories. You can also search for contacts by scan
  > date and modification date.

  > Note: in advanced searches, Cardiris will look for cards that *start* with
  > the text you enter in any of the search fields, not for cards that *contain*
  > the text you enter.

  > Also note that you can use multiple search fields at the same time.

  > **Tip**: you can make use of logical operators (AND and OR) and
  > quotation marks inside the search fields.

- Determine in which **sort order** you want the search results to be
  displayed.
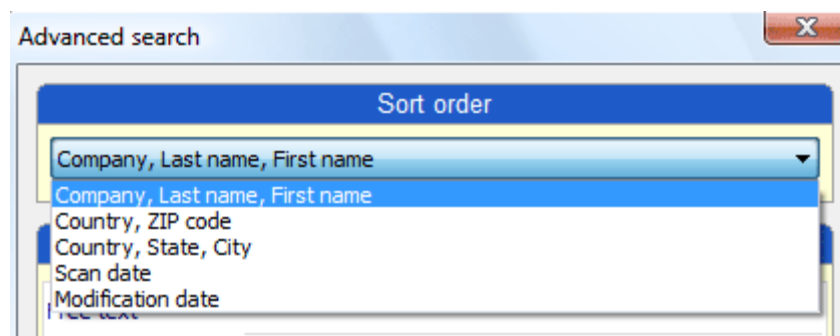
- Enter the text you want to search in the search fields and click
  OK.

- Cardiris will display all cards that match the search criteria. The
  filter button, the status bar and the pink background indicate that

you're displaying a "hitlist". The status bar also indicates the number of cards that have been found.

If none of the cards meet the search criteria:

- the application window remains empty and the status bar confirms that there are no cards to display. (album view)

- the card image is empty, no data fields are filled out and the card status is grayed. (card view)

- To redisplay all cards after a search, erase the search term and press **Enter** or click the button **All cards** on the button bar.

FINDING AND RESOLVING DUPLICATES

Cardiris is a comprehensive card database solution. It allows you to **import** business cards from and **export** them to other databases, **synchronize** entire databases, etc. To avoid that your database is infected with duplicate cards or obsolete information, Cardiris disposes of a convenient **Duplicates management** function.

To find and resolve duplicates:

- Click the **Find duplicates** icon on the main toolbar.

- In the **Find duplicates window**, select the search parameters you want to use. Duplicate contacts can be contacts who have matching:

    o company names, first names and last names

    o first names and last names

    o first names

    o last names

    o e-mail addresses
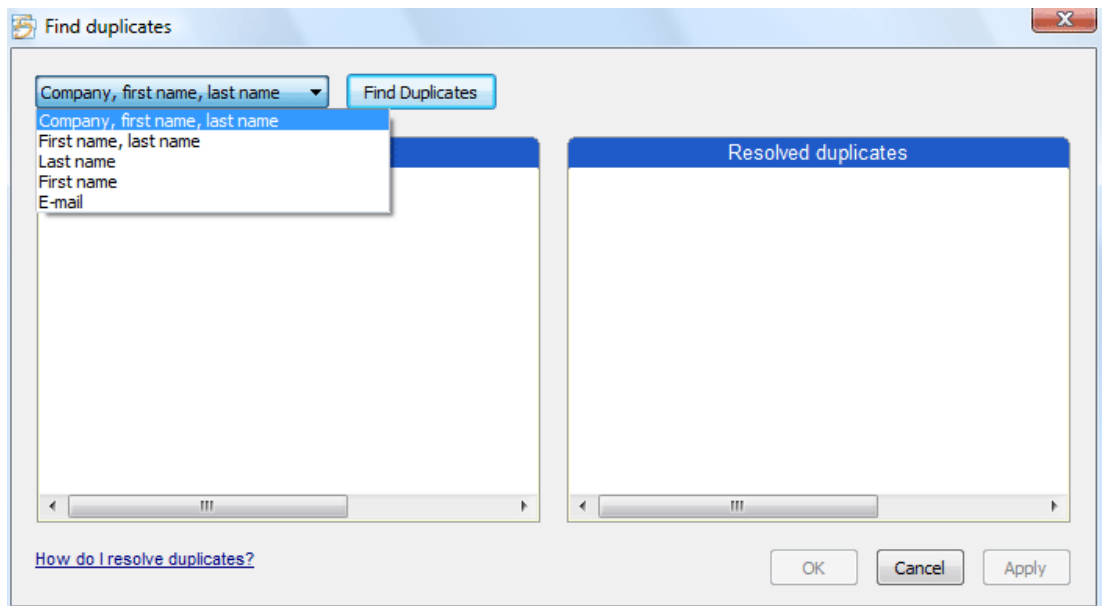
- Then click the **Find Duplicates** button.

    Cardiris lists the duplicate contacts (and indicates between brackets how many duplicates have been detected per card).
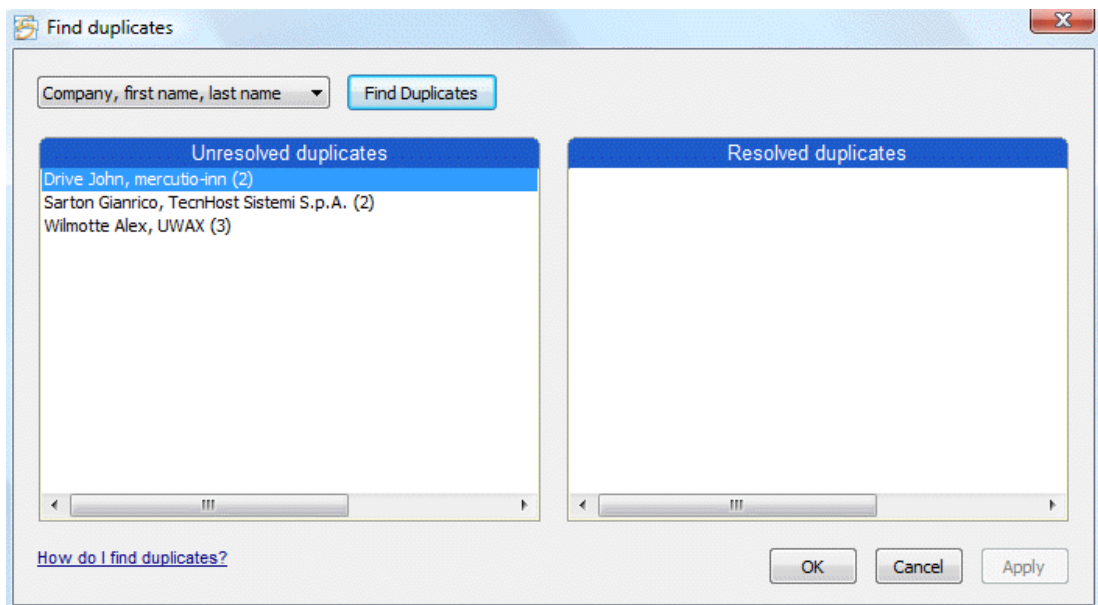
- Double-click any of the duplicates to view their information in detail.

- The card data is spread out across 4 different tabs. The tabs marked in **red** require your attention. The information inside the tabs that are not marked has been processed automatically by Cardiris.

Tab Data and Tab Custom fields

Click the **Data** tab to access the data fields information. The information below also applies to the **Custom fields** tab.

When Cardiris finds duplicate contacts, it compares the information in the data fields of the different contacts and merges the contacts into a single card.

Color codes are used to indicate the status of the information:

- The merged card fields are marked in **black**.

- The information that has been selected and moved to the merged card is marked in **blue**. This is the information that Cardiris considers to be correct.

- The information that has not been used in the merged card is **grayed**.

- Fields that Cardiris could not merge are marked in **red**. Double-click any of the red fields to move them to the merged card.

- Alternative information that can also be moved to the merged card (instead of the current information) is marked in **orange**. When you or Cardiris selected the wrong information, double-click the orange data fields to move them to the merged card.

You can also use the **AutoComplete** button to have Cardiris merge the duplicate contacts for you. Cardiris will then select the most recent information and move it to the merged card.
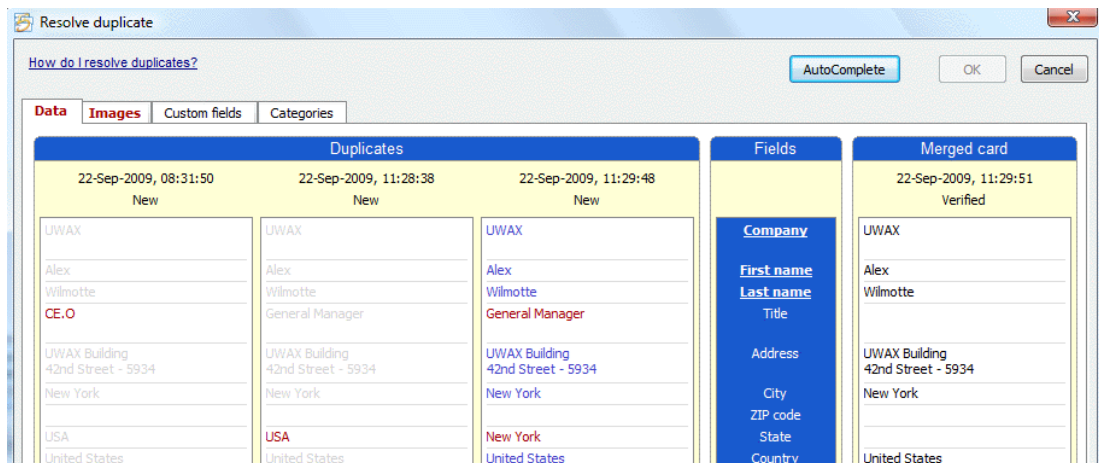
> **Note**: the information in the **Notes** field never creates a conflict. Any information in any **Notes** field will be added to the merged card, in combination with the data and time when the information was added.
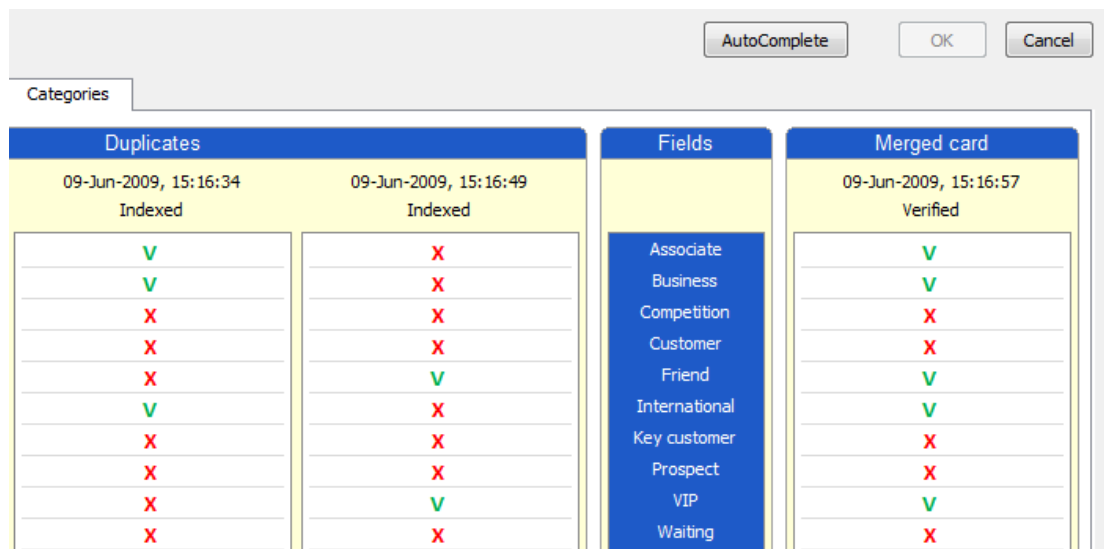
When you are done resolving all the duplicates click **Apply** to save them in the database or click **OK** to save them and close the window. Resolved duplicates get the card status **Verified**. The superfluous contacts will be deleted.

Tab Images

Cardiris displays all three image types that can be attached to your contacts: **Front** images, **Back** images and **Pictures**.

It automatically selects the most recent images and moves them to the merged card.

Images that could not be merged by Cardiris need to be merged manually. To move an image to the merged card, simply **double-click** it. The image you did not select will be hazy.
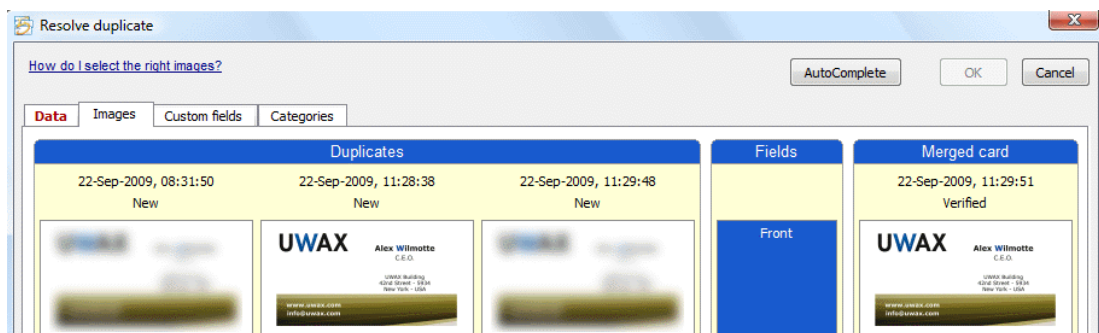
Should you have selected the wrong image, double-click the hazy one to move it to the merged card.

Note: the images inside the tab are necessarily kept small. To **zoom** in on an image, right-click it. To close the zoom window, again use right-click.

> **Tip**: you can move all three images of a duplicate contact (front image, back image and picture) simultaneously to a merged card. To do so, hold down the **Shift** key while you double-click any image of the duplicate. The images of the other duplicates will be discarded.

You can also use the **AutoComplete** button to have Cardiris merge the duplicate images for you. Cardiris will then select the most recent image and move it to the merged card.

When you are done resolving all the duplicates click **Apply** to save them in the database or click **OK** to save them and close the

window. Resolved duplicates get the card status **Verified**. The superfluous contacts will be deleted.

Tab Categories

Any categories you assigned to your contacts will be included in the merged card. It suffices that one of the duplicates contains a category for it to be added to the merged card.

The categories that have been moved to the merged card are marked by a green **V** sign, the ones that are not by a red **X**.

To add categories to the merged card, double-click their red **X** sign. To remove them, double-click their green **V** sign.

You can also use the **AutoComplete** button to have Cardiris merge the duplicate categories for you.

When you are done resolving all the duplicates click **Apply** to save them in the database or click **OK** to save them and close the window. Resolved duplicates get the card status **Verified**. The superfluous contacts will be deleted.

MAINTAINING CARD DATABASES

Cardiris is a comprehensive card database solution. The databases you create or open in Cardiris can be merged or migrated with other Cardiris databases, duplicated etc.

Opening and saving databases

Cardiris always opens the database that was last opened. Any changes you make to a database are saved automatically. There is no need to hit a **Save** button.

To open another database, click the **Open** command on the **File** menu.

Creating and saving new databases

To create a new database, click the **New** command on the **File** menu. A new database must be saved once by clicking the **Save as** command on the **File** menu. After that, any changes you make are saved automatically.

Compacting databases

You can compact your databases to reduce their file size to a minimum. Compacting a database is useful when you removed many cards from it.

To compact a database, click the corresponding command in the **File** menu.

> **Tip**: use low-resolution images only when you attach a picture to your cards! (All data, including the images, are stored inside the database file.)

Duplicating databases

You can duplicate your databases to create backups.

To duplicate a database either:

- Click **Save As** in the **File** menu and save the database as a .c5d file (database file).

- Or **copy** the database file in **Windows Explorer** to another location.

Duplicating contacts

You can also transfer specific contacts, *not* entire databases, to another Cardiris database.

Two methods are available.

- **Open** both **databases** and **drag** the **contacts** from one database to the other.

> **Tip**: the **current database** is mentioned in the **title bar**.

- **Select** the cards to be transferred, **export** them and **import** them later on in the other database. (Select the export and import filter **Cardiris 5**)

Migrating older databases

To migrate older databases:

- Open a database created in a previous version of Cardiris by clicking the **Open** command on the **File** menu. Select the Cardiris version in the **Files of type** list.

or

- Import the contacts from earlier versions of Cardiris (3.x and 4.x) into an empty database. To do so:

  o Click **Export** on the main toolbar and then click the **Import** tab.

  o Select from which Cardiris version you want to import contacts and click **Import**.

  o Select the database file of your choice and click **Open**.

Merging databases

To merge two recent databases:

- Import the contacts of another database into your current database. To do so:

  o Click **Export** on the main toolbar and then click the **Import** tab.

  o Select **Cardiris 5** from the list.

  o Select the database file of your choice and click **Open**.

- Open both databases and drag all contacts from one database to the other. To do this quickly:

  o Open the database in album view and click **Select All** in the **Edit** menu.

  o Then drag them to the other database.

DELETING CARDS

Cards can be deleted from a database in several ways.

To delete cards:

- Select one or more cards.

- Right-click them and click **Delete card(s)**.

- Click the command **Delete card(s)** on the **Edit** menu.

- Hit the **Delete** key on your keyboard.

CHAPTER 8
EXPORTING CONTACTS

EXPORTING BUSINESS CARDS

The contacts in your Cardiris database can be exported to numerous external applications. They can be exported to **contact managers**, **personal information managers** (PIMs), **customer relation managers** (CRMs), **databases**, **spreadsheets** and even **word processors** whose mail merge function allows to print letters, envelopes and labels.

You can also save your contacts in a structured file, for instance in the **vCard** format, to import them into any address database, such as Microsoft Access. vCard files can also be imported into any vCard compliant application.

Cardiris Corporate also allows you to export contacts to Microsoft Dynamics CRM and Salesforce CRM.

> See the sections **Exporting to Microsoft Dynamics CRM** and **Exporting to Salesforce CRM** for more information.

To export contacts from Cardiris:

- **Select** the cards you want to export. This can be done in several ways:

  o Hold down the **Ctrl** key and click the cards you want to select.

  o To select a continuous range of cards, click the first card and hold down the **Shift** key when you select the last card.

  o Execute a **free text search** to single out the cards you want to export.

  o Execute an **advanced search** (using the binoculars) to single out the cards you want to export.

  When no cards are selected, all cards will be exported to the selected application.

- Click **Export** on the main toolbar and select the required export application from the list.

  Note that the option **Export all cards** at the bottom of the **Export** list overrules any selection you may have made.

- Click **Configure** to configure the export.

  Configuring the export implies setting several minor options. These options are discussed in detail in the Cardiris **ReadMe** file.

  Note: whether or not the **Configure** button is available depends on the selected format or application.

- When you are done configuring the export, click **OK** to confirm.

  Your contacts will be stored in the selected export format or application. Open it to check the results.

Tip: you can also access the **Export** options by right-clicking a card or a selection of cards and clicking **Export**.

> **Tip**: if you want to export contacts to another Cardiris database, you do not necessarily have to use the **Export** function; you can also open both databases and drag contacts from one database to the other.

> **Tip**: select **E-mail** from the **Export** list to distribute contacts and their card images through your e-mail software. A new e-mail message will open containing a vCard file that in turn contains your contacts.

EXPORTING TO WINDOWS CONTACTS

When you are using Cardiris on a Windows Vista or Windows 7 based computer, you have the possibility to export your business cards to **Windows Contacts**. Windows Contacts replaces Windows XP's Address Book and allows you to keep track of people and organizations by creating contacts. It also functions as the address book for Windows Mail.

> **Note**: if you are using Windows XP, you do not have Windows Contacts. You can export to **Windows Address Book** (in Outlook Express) instead. See **Exporting to Windows Address Book** for more information.

To export business cards to Windows Contacts:

- Select the cards you want to export.

- Click **Export** on the main toolbar, and select **Windows Contacts** from the list.
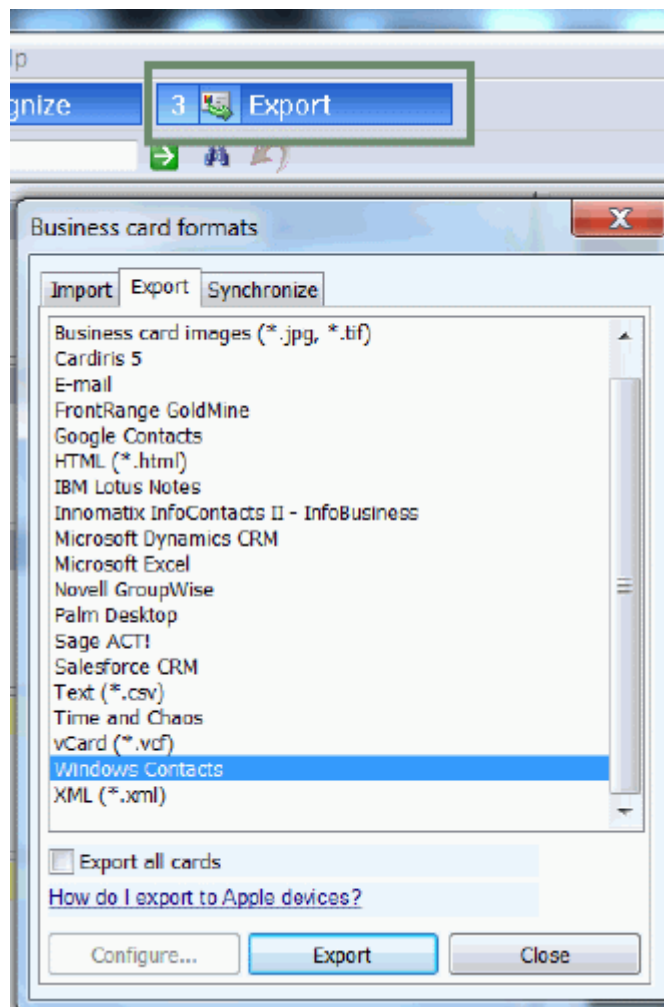
- Then click **Export**. Your contacts will be added to the **Windows Contacts** folder.

  The Contacts folder can be found in **C:\Users\YourAccount\Contacts**. Double-click the contacts to display their information.
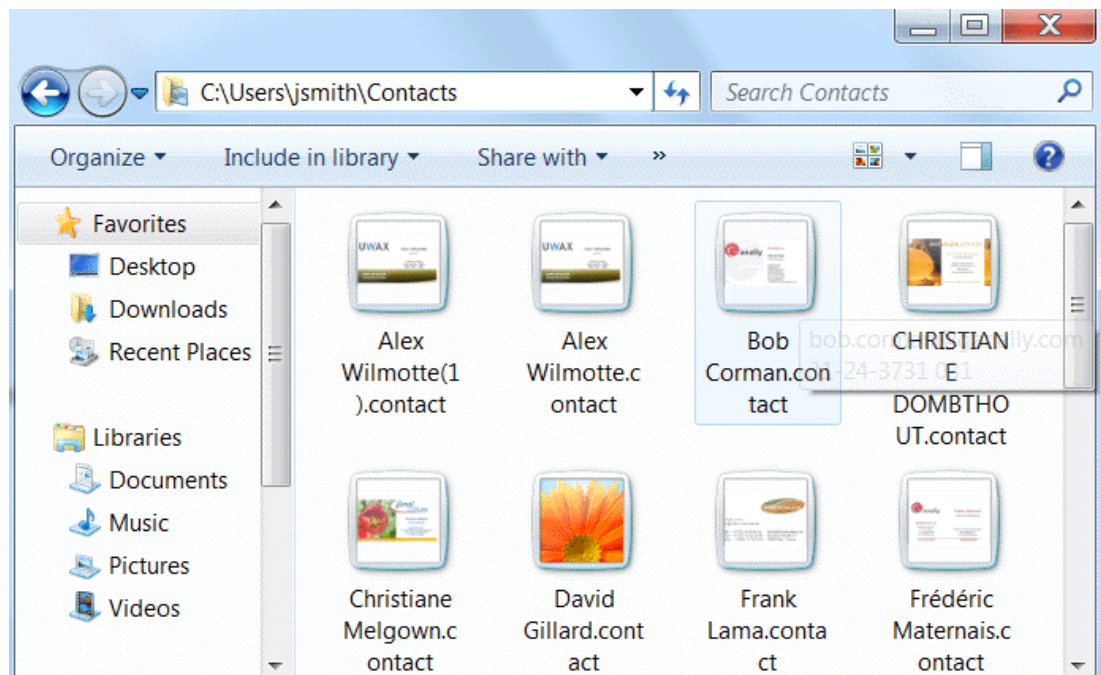
> **Tip**: you can also type "**wab.exe"** in the **Search** field to locate the Contacts folder.
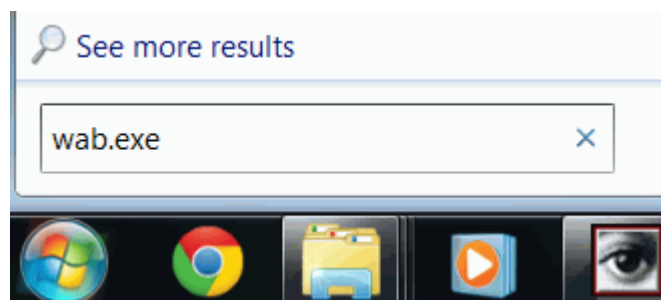

EXPORTING TO WINDOWS ADDRESS BOOK

When you are using Cardiris on a Windows XP based computer, you can export your business cards to **Windows Address Book** (in Outlook Express)

> Note that this feature is only available in combination with Windows XP, as Windows Address Book has been replaced by **Windows**

Contacts since Windows Vista. See **Exporting to Windows Contacts** should you want to export to Windows Contacts.

To export business cards to Windows Address Book:

- Select the cards you want to export.

- Click **Export** on the main toolbar, and select **Microsoft Outlook Express** from the list.

    Note: make sure to select Microsoft Outlook Express, not Microsoft Outlook. The Windows Address Book cannot be used directly from Outlook.
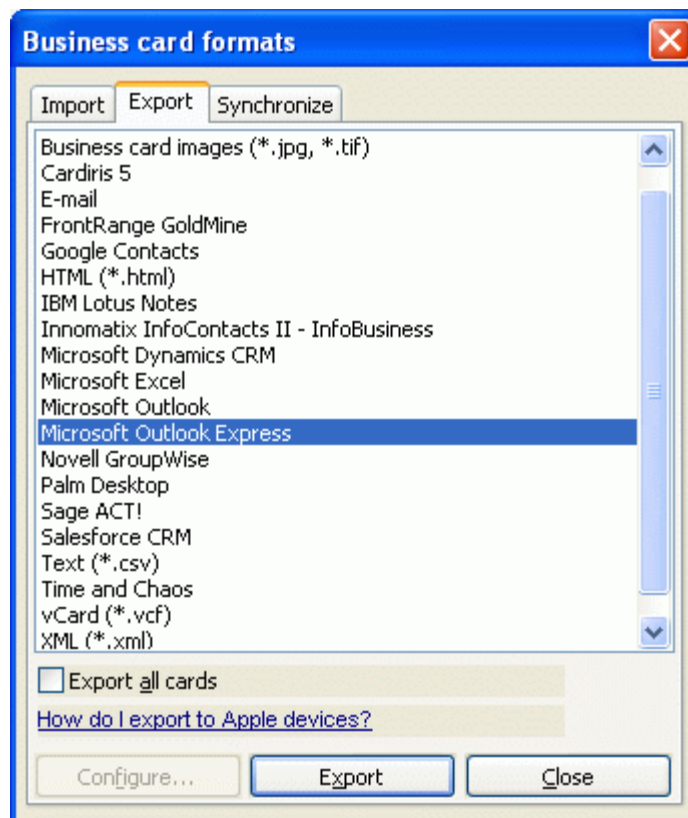
- Then click **Export**. Your contacts will be added to the **Windows Address Book**.
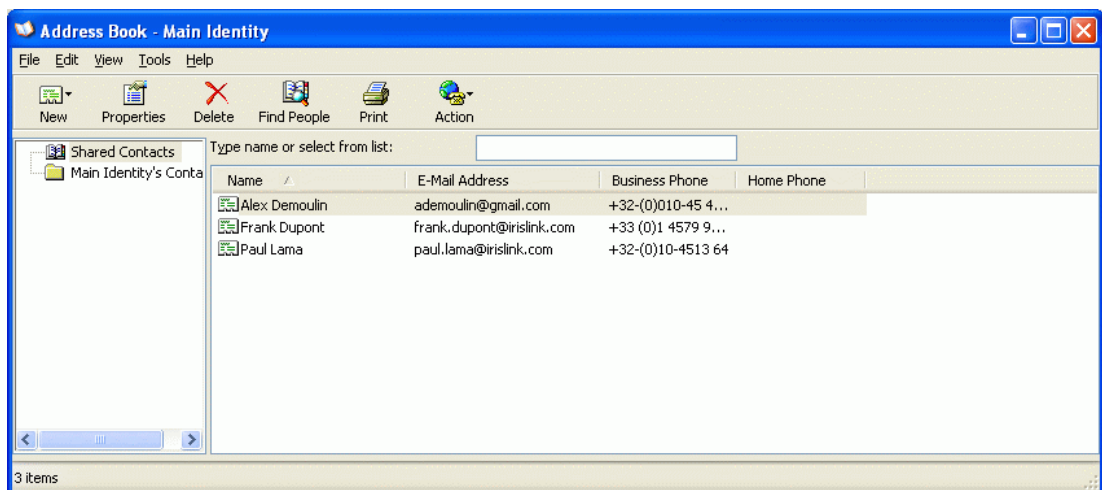
EXPORTING TO APPLE DEVICES

The contacts you create with Cardiris can be exported to your Apple devices via iTunes. All you need to do, is first export your contacts to Windows Contacts or Windows Address Book, then configure iTunes to sync with one of the two aforementioned applications.

The contacts from Cardiris are added to the **Contacts** app on your Apple device.

Exporting your contacts to Windows Contacts or Windows Address Book

See the sections **Exporting to Windows Contacts** and **Exporting to Windows Address Book** to learn how to do so.

Syncing iTunes with Windows Contacts or Windows Address Book

• From the Windows **Start** menu, click **All Programs** > **iTunes**.

If iTunes is not installed on your computer click **here** to access the download page.

- Connect your Apple device to your computer.

- When your device appears in the list on the left side of the iTunes window (below **Devices**), select it.
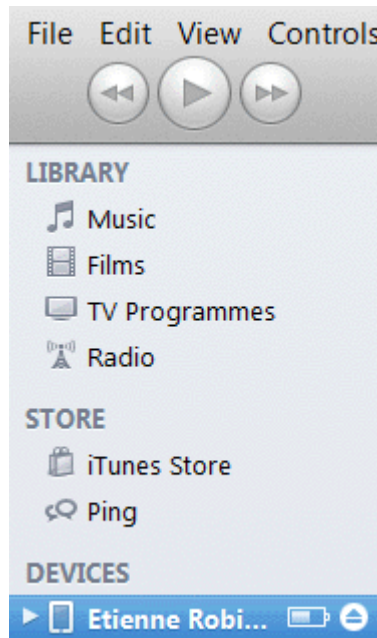
- At the top of the Window click **Info**.

- Check the option **Sync Contacts with**, and then select **Outlook** or **Windows Contacts** from the list.

- Then click **Apply** to sync your contacts with the ones on your Apple device.
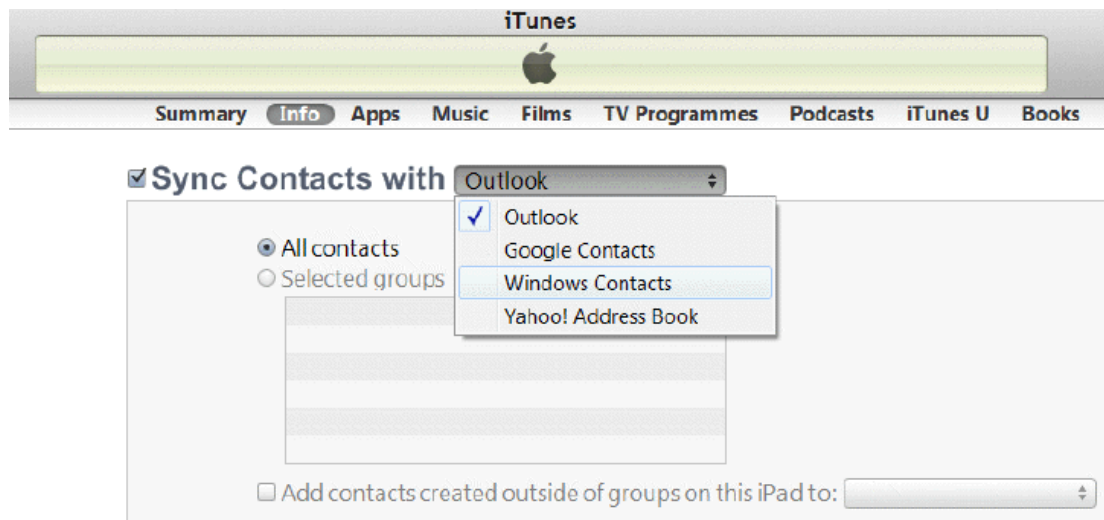
- The contacts from Cardiris are added to the **Contacts** app on your Apple device.

EXPORTING TO GOOGLE CONTACTS

The contacts you create with Cardiris can be exported to the **Google Contacts** section of your **gmail** account.

> **Note**: a Google account is required to export contacts to Google Contacts.

To export contacts to Google Contacts:

- Select the cards you want to export.

- Click **Export** on the main toolbar, and select **Google Contacts** from the list.
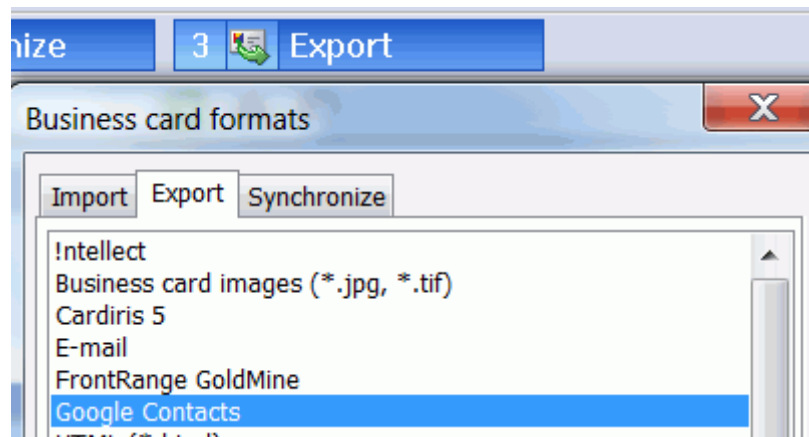
- Then click **Configure** at the bottom of the window.

- Enter the credentials of your Google account and click **OK**.
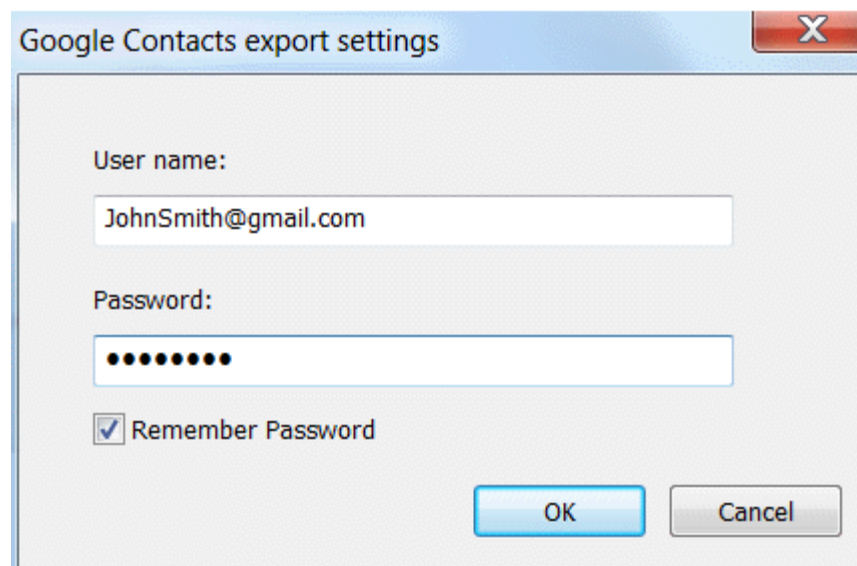
- Then click **Export** to export the cards. A **Cardiris** group containing your contacts will be added to the **Contacts** section of your gmail account.

  Note: if your contacts contain categories, a separate group will be created as well, based on the custom field. E.g. **Cardiris - Associate** in the image below.

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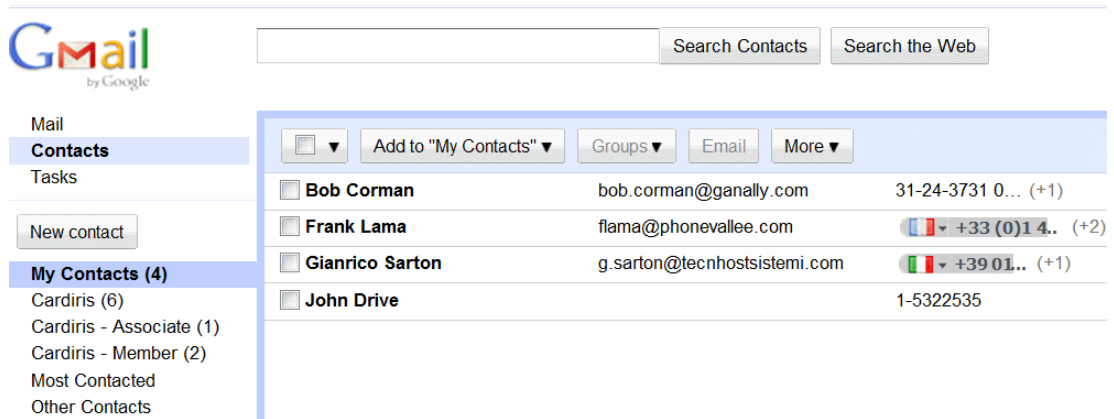
- All the database fields from Cardiris - including any Custom fields you created - are included in each Google contact.

Tip: you can also move the contacts to the standalone application **Google Contacts**. To do so, select the contacts and click **Groups** > **My Contacts > Apply**.
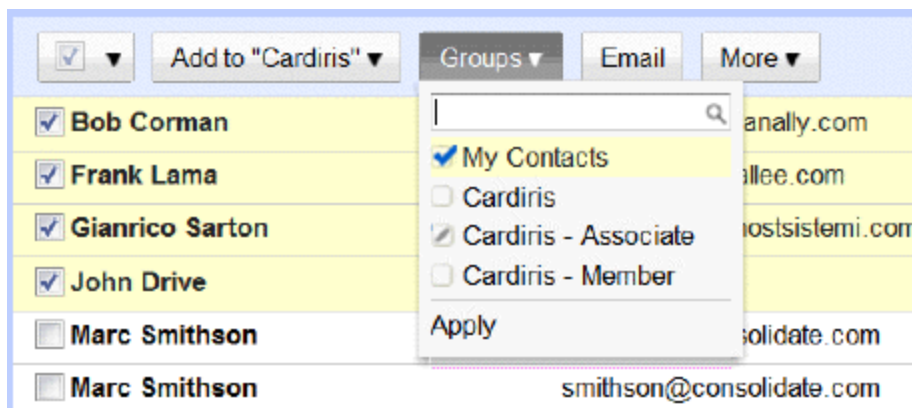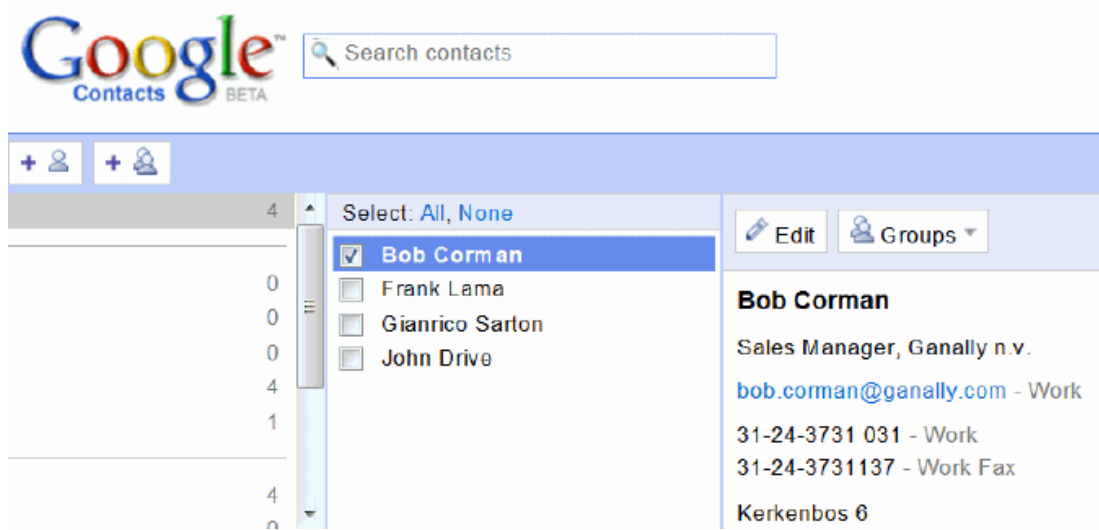
EXPORTING CONTACTS TO MICROSOFT DYNAMICS CRM

Cardiris Corporate allows you to export contacts to Microsoft Dynamics CRM.

Microsoft Dynamics CRM is a **C**ustomer **R**elationship **M**anagement system and allows your organization to manage customers throughout the entire sales process efficiently.
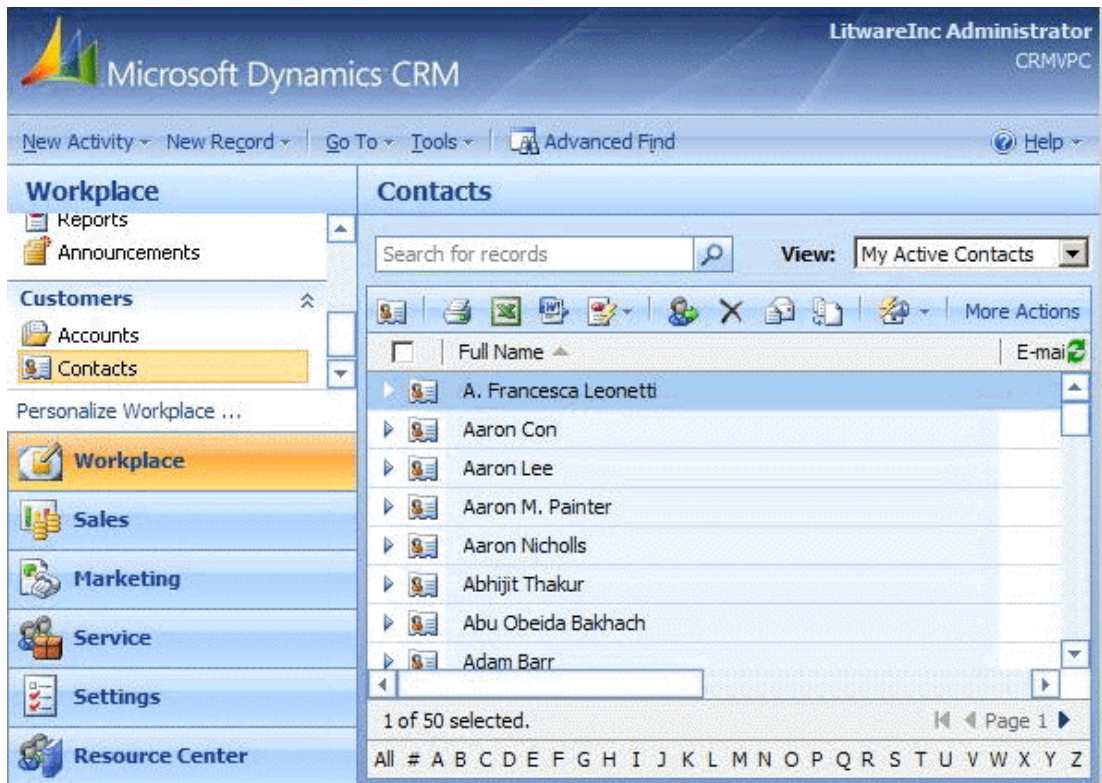
Note: In order for **Cardiris Corporate** to interact successfully with Microsoft Dynamics CRM, CRM administrators must configure the Cardiris CRM connector and set up the CRM servers correctly. To learn how to do so, CRM administrators should refer to the **Administrator Guide** on how to configure Cardiris Corporate in the Cardiris installation folder\Doc\Eng.

Cardiris Corporate supports Microsoft Dynamics CRM 3.0, Microsoft Dynamics CRM 4.0, Microsoft Dynamics CRM 2011 Server and Microsoft Dynamics CRM Online.

Operation

To export contacts to Microsoft Dynamics CRM:

- Click the **Export** button on the main toolbar.

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- Select **Microsoft Dynamics CRM** from the list of available export applications.
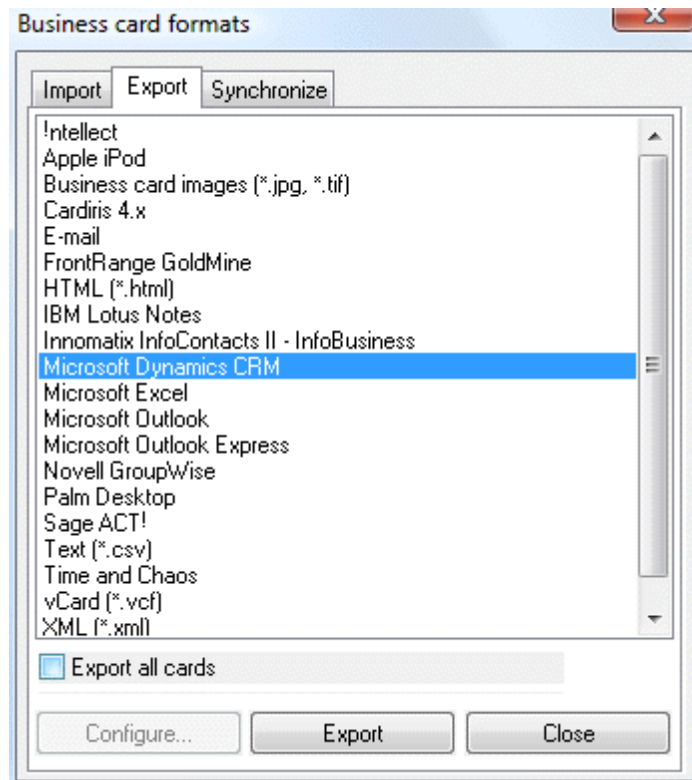
- Click **Export** to export your contacts to Microsoft Dynamics CRM.

  Note: to establish a successful connection, the client computer running the Cardiris application must reside in the same domain as the CRM server.

  Note that the **Configure** button is disabled. Only **CRM administrators** have the necessary rights to change the CRM configuration.

- Cardiris will open the **Find duplicates** window.

  Note: should you want to skip this step, click the **Skip** button.

  Duplicate contacts can be contacts that have matching:

  - company names, first names and last names

- first names and last names

- first names

- last names

- e-mail addresses

It is up to the user to determine the search parameters in the drop-down list.
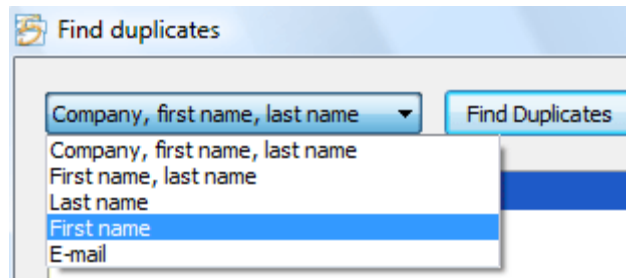
- Select the search parameters of your choice and click **Find Duplicates**.

    Cardiris starts looking for duplicates and displays the unresolved duplicates, if there are any.

    Cardiris will display duplicates that exist **within the Cardiris database** and **duplicates between Cardiris and CRM**.

    Note that only **Active contacts** in CRM are taken into account when finding duplicates.
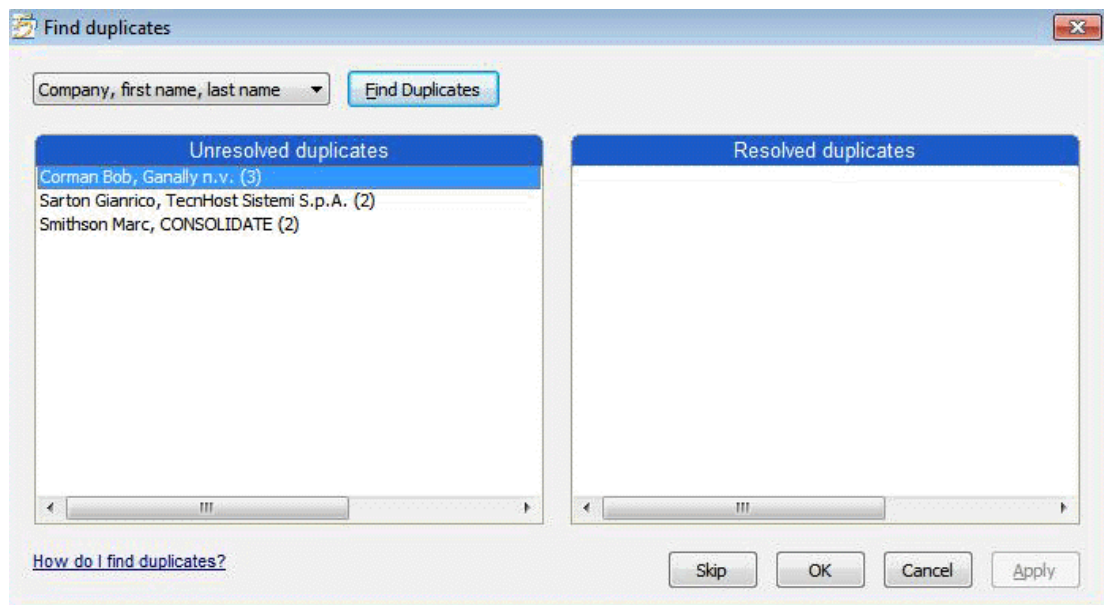
If duplicate cards are found **within the CRM database itself**, a warning message is displayed. These duplicates need to be resolved manually within CRM before the export procedure can be repeated. Cardiris will proceed with the export procedure of other cards.

- Double-click any duplicate in the list to compare the contact information.

  Cardiris will automatically merge the matching contact information into a single card.

  To decide whether a CRM card is a duplicate of a Cardiris card and vice versa, Cardiris follows a two-step procedure:

  - First it compares the value of user-specified fields (last name, company name, etc.) Blank fields are ineligible.

  - Secondly, it compares the modification date of both the Cardiris and CRM cards to the date of the previous export. If neither the CRM cards nor the Cardiris cards have been modified since the previous export, these cards will not be included in the new export procedure.

  Information that does not match is marked in red. Decide which information you want to add to the merged card and double-click in the required fields to do so. Or click **AutoComplete** to let Cardiris do

it for you. Cardiris will then use the most recent data and add it to the merged card.
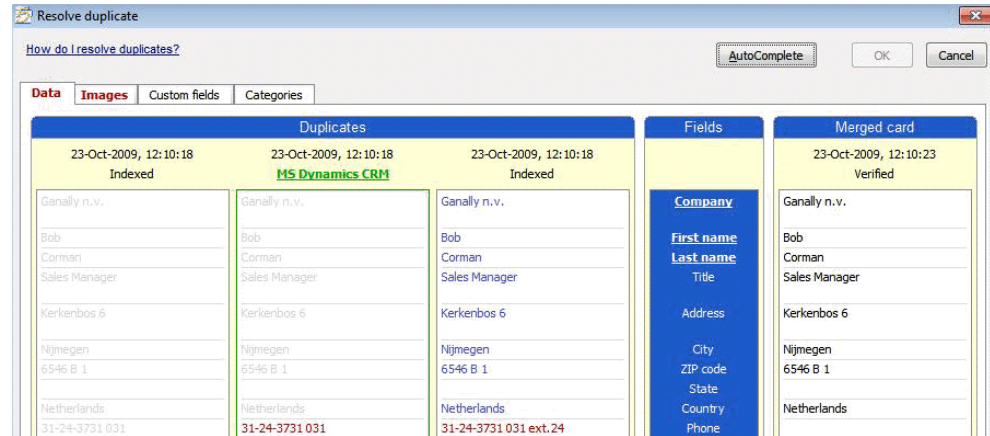
Note: when you interrupt the duplicates resolving procedure, only resolved duplicates are committed to the CRM and Cardiris databases and a warning message will be displayed.

- Click **OK** and proceed to the next duplicate.

- When you are finished comparing the duplicates, click **Apply** to export the resolved duplicates to CRM or click **OK** to export the resolved duplicates and close the window.

  If there still are unresolved duplicates, a new warning message will be displayed.

  Cards that have already been exported to CRM will not be included in a new export action, unless they have been modified since the previous export.

Tip: Click **How do I resolve duplicates?** to consult the Online help for more information about resolving the duplicates.

EXPORTING CONTACTS TO SALESFORCE CRM

Cardiris Corporate allows you to export contacts to Salesforce CRM.

Note, however, that an Enterprise, Unlimited or Developer Salesforce account is required. It is not possible to export to other types of Salesforce accounts.

In order for Cardiris to interact successfully with Salesforce CRM, CRM administrators must configure the Cardiris CRM connector. To learn how to do so, CRM administrators should refer to the Administration Guide in the Cardiris installation folder\Doc\Eng.

To export contacts to Salesforce CRM:

- Click the **Export** button on the main toolbar.

- Select **Salesforce CRM** from the list of available export applications.
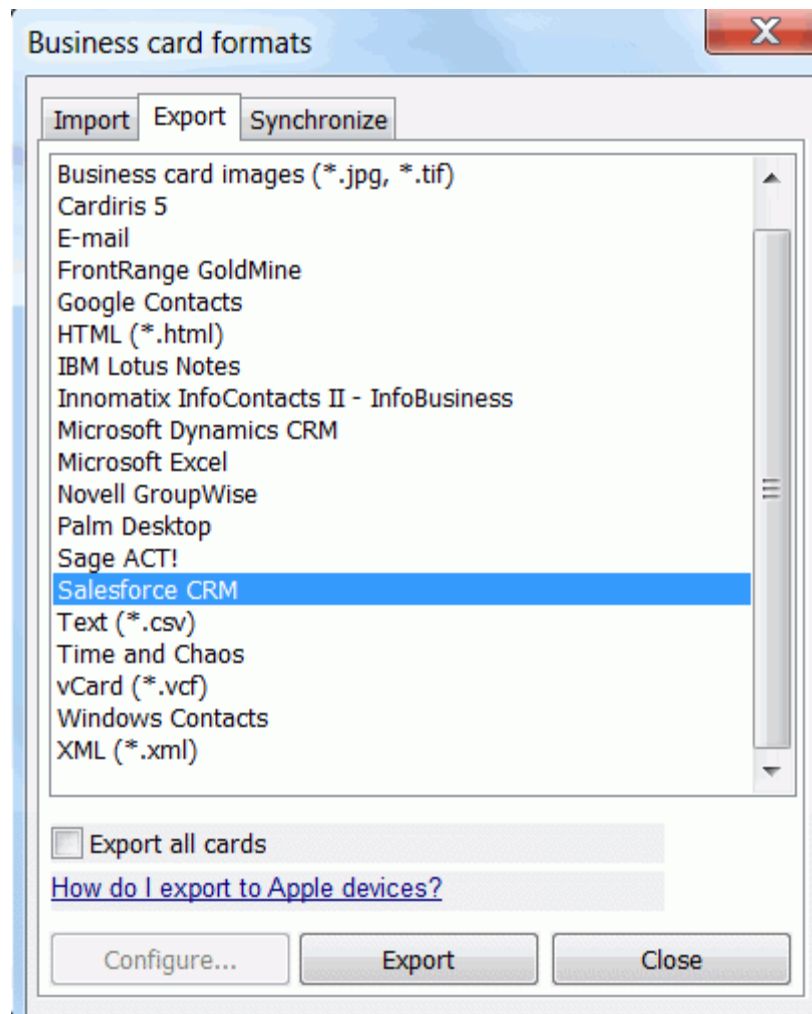
- Click **Export** to export your contacts to Salesforce CRM.

    Note that the **Configure** button is disabled. Only **CRM administrators** have the necessary rights to change the CRM configuration.

    Also note that you need to have access rights to the Salesforce API in order to export to Salesforce. Should this not be the case, contact your Salesforce CRM administrator.
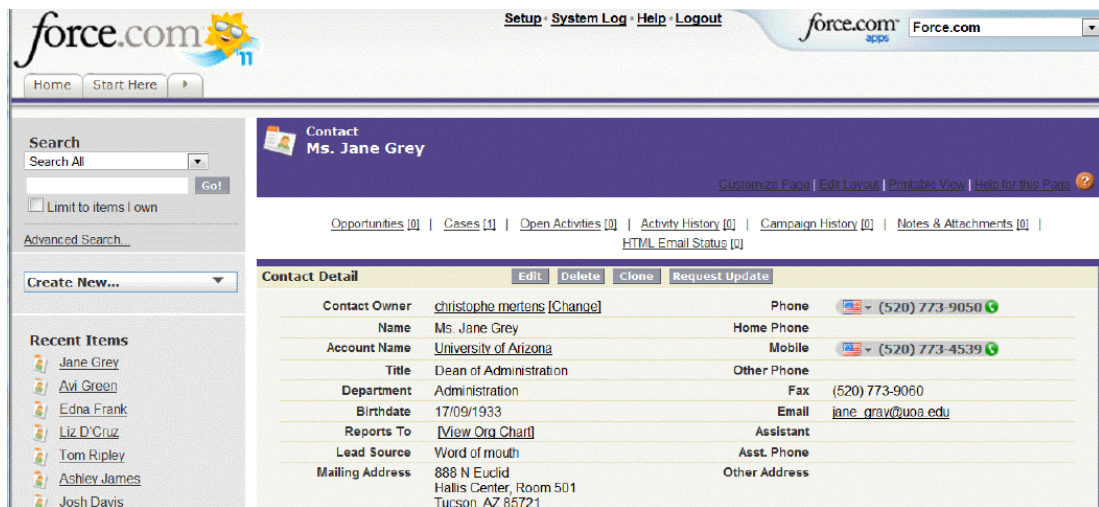
Warning: the Cardiris contacts must be in line with Salesforce CRM's policy. Contacts without a last name or with an incorrect e-mail structure will be rejected.

Should an error occur while exporting cards then check the *****Cardiris_n.log** file in your Windows temp folder. To access the temp folder, type in %TEMP% in Windows Explorer. If necessary, you can always send the log file to I.R.I.S. support for further assistance: www.irislink.com/support.

*A new Cardiris log file is created each time you start Cardiris. The 'n' in Cardiris_n.log represents a 3 to 6 digit figure.

PRINTING BUSINESS CARDS

Should you want to print your contacts, click the **Print** command on the **File** menu. Cardiris can either print your contacts in a **list** or print their **labels** only.

To print business cards:

- On the **File** menu, point to **Print**.

- Then select either **Labels** or **List**.

    When printing **Labels**, the contacts are printed in small frames to put a maximum of labels on a page.
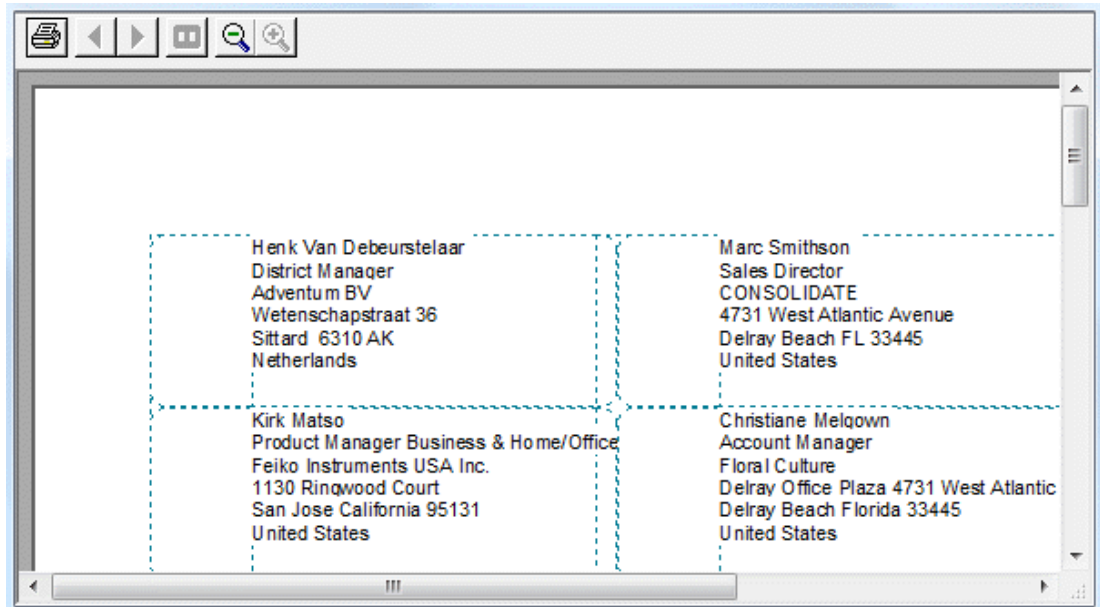
    When printing **Lists** the full width of the page is used.
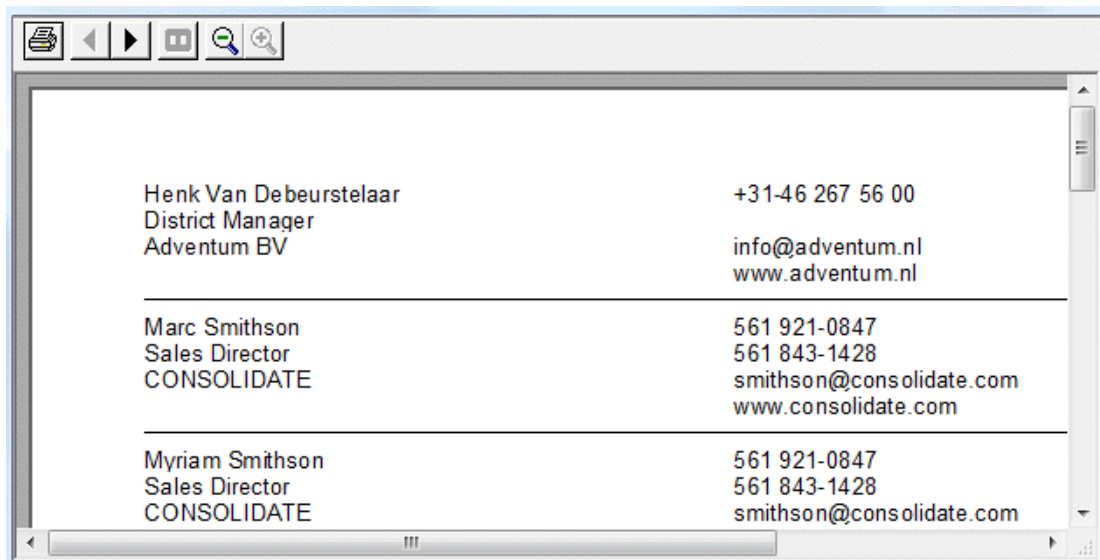
- A configuration window will open allowing you to set the **Label type**, **Field order**, **Font** and **Print setup**.

Label type

All standard label types (Avery and NEBS) are supported.

Field order

Click **Field order** to choose the data fields you want to include or exclude and determine their sort order.

Font

Click **Font** to determine the typeface, type style and point size.

Print setup

The **Print** setup allows you to select your **printer options**.

- Click **Print** preview to preview the results.

- If the results are satisfactory, click **Print**.

Should you want to print the card images, **export** your cards as **business card images** in the JPEG or TIFF format. Then use your imaging software to open and print the image files.

> See the section **Exporting business cards** for more information.

CHAPTER 9
IMPORTING CONTACTS

Cardiris not only allows you to export your contacts to external applications, you can also **import** contacts from other **contact managers** into Cardiris.

To import contacts:

- Click **Import, Export and Synchronize** on the **File** menu.

- Click the **Import** tab and select the import format or application from the list.

    Warning: importing contacts from other databases may create duplicate contacts in your database. See the section **Finding and resolving duplicates** for more information about duplicates management.

- Click **Configure** to configure the import.

    Configuring the import implies setting several minor options. These options are discussed in detail in the Cardiris **ReadMe** file.

    Note: whether or not the **Configure** button is available depends on the selected format or application.

- When you are done configuring the import, click **OK** to confirm.

    The contacts will be added to the Cardiris database.

CHAPTER 10
SYNCHRONIZING DATABASES

When you use several contact managers besides Cardiris and import/export contacts regularly from one database to another, it is useful to synchronize your contact databases on a regular basis.

To synchronize databases with Cardiris:

- Click **Import, Export and Synchronize** on the **File** menu.

- Click the **Synchronize** tab and select the database you want to synchronize with Cardiris from the list.

- Click **Configure** to configure the synchronization.

    Configuring the synchronization implies setting several minor options. These options are discussed in detail in the Cardiris **ReadMe** file.

    Note: whether or not the **Configure** button is available depends on the application.

- Then click **OK** to confirm.

    Any contacts that are missing in one database will be copied from the other and vice versa.

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