

AmbirScan Business Card User Guide



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Welcome

Thank you for your purchase of an Ambir Technology scanner. AmbirScan Business Card is designed as a convenient way to scan Business Cards and manage your contacts. This User Guide is an easy-to-use reference for all the features and functionality of the AmbirScan Business Card software.

Installing Your Scanner

⚠ IMPORTANT: Users must have full administrative rights to install the drivers and software. If you are unsure of your user and/or installation privileges, please contact your local IT support. Ambir Technology Support cannot change or edit your permission levels.

Before you can scan, you must install the appropriate driver. Please visit our [Drivers](#) page for easy installation.

Installing AmbirScan Business Card

Our AmbirScan Business Card software is an easy to use application for scanning business cards.

To install AmbirScan business card, follow the below steps:

1. **Install** AmbirScan software and follow the on screen installation prompts.
2. Upon final installation, the **AmbirScan Business Card icon** will be installed on your desktop.
3. **Double-click** the AmbirScan Business Card icon to open the software.

Calibration

All Ambir scanners are factory calibrated, so initial calibration is not required. Over time you may need to recalibrate your scanner for information on calibrating your scanner, please visit our [FAQ page](#).

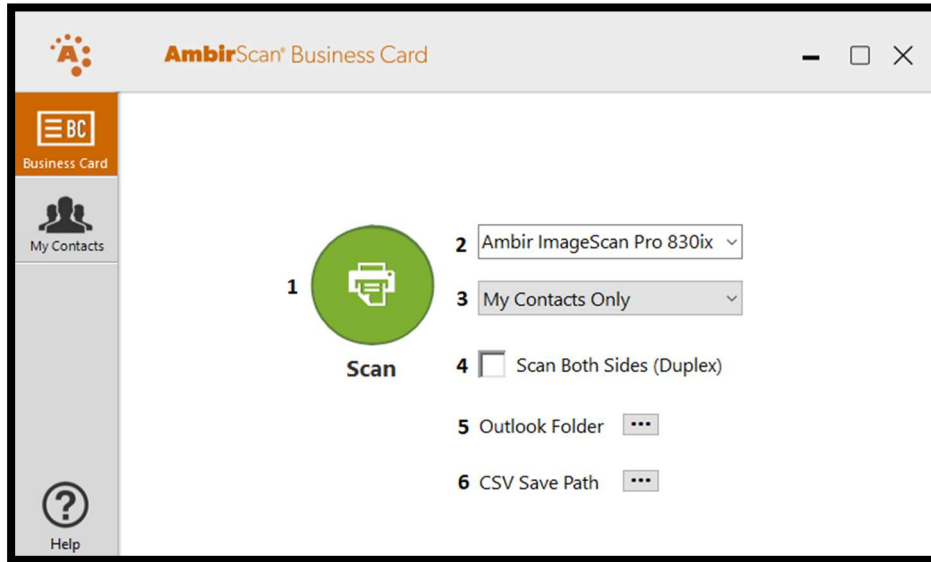
Cleaning

If you notice a deterioration in scanning quality over time, you may need to clean your scanner in addition to calibration. For instructions on how to clean your scanner, please visit our [FAQ page](#).

AmbirScan Business Card Overview

AmbirScan contains several adjustable settings which can be tailored to best suit your requirements. The sections below explain each setting and their locations and functions within the program.

Scan Interface



1. **Scan:** This button will start the scan process with the selected scanner.
2. **Select Scanner:** The dropdown allows you to select which Ambir Scanner you want to scan with.
3. **Destination Dropdown:** In this dropdown you can select from My Contacts Only, Scan to Outlook, Scan to CSV/Excel and Scan to Salesforce. For More info see the chart on page 5.
4. **Scan Both Sides (Duplex):** This checkbox will enable scanning of both sides of a business card. *NOTE: Simplex Scanner models such as the PS600 will have this option greyed out.*
5. **Outlook Folder:** Click the three dots next to Outlook Folder to select the outlook folder you will add contacts to as you scan business cards. This also selects the folder you send contacts to if you right click Send to Outlook from the My Contacts Window.
6. **CSV Save Path:** Click the three dots next Outlook Folder to select the folder destination of your contacts.csv file where all your contacts will be added to. you will add contacts to as you scan business cards.

AmbirScan Business Card Destination Behavior

The table below illustrates how AmbirScan software will behave when different destinations are selected in the Destination Dropdown.

Feature Name	Behavior
My Contact Only	<ul style="list-style-type: none"> • Scan Button Starts the Business Card Scanning Process. • Extract the data from the business cards and put them into the data confirmation window this will happen once the done button is pressed. • Will add the extracted info to the My Contacts Section of the software. • The image file automatically saves to the C:\Users\Public\Documents\AmbirScan\Business Cards folder after done is hit.
Scan To CSV/Excel	<ul style="list-style-type: none"> • Scan Button Starts the Business Card Scanning Process • Extract the data from the business cards and put them into the data confirmation window this will happen once the done button is pressed • Will add the contact info to a contacts.csv CSV/Excel file located in folder you have set with your CSV save path setting. If no file location was set the default folder is C:\Users\Public\Documents\AmbirScan\Business Cards folder. • Will add the extracted info to the My Contacts Section of the software. • The image file automatically saves to the C:\Users\Public\Documents\AmbirScan\Business Cards folder after done is hit.
Scan To Outlook	<ul style="list-style-type: none"> • Scan Button Starts the Business Card Scanning Process • Extract the data from the business cards and put them into the data confirmation window this will happen once the done button is pressed

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	<ul style="list-style-type: none"> • Will add the contact info to your outlook contacts by default. If a custom contacts folder has been selected with the Outlook folder button it will place the new contact there. • Will add the extracted info to the My Contacts Section of the software. • The image file automatically saves to the C:\Users\Public\Documents\AmbirScan\Business Cards folder after done is hit.
Scan To Salesforce	<ul style="list-style-type: none"> • Scan Button Starts the Business Card Scanning Process • Extract the data from the business cards and put them into the data confirmation window this will happen once the done button is pressed • Will prompt for Salesforce credentials if not logged in. • Will create a salesforce contact under the account matching the company on the contact info. If no company is found a floating contact you can assign to an account will be created. • Will add the extracted info to the My Contacts Section of the software. • The image file automatically saves to the C:\Users\Public\Documents\AmbirScan\Business Cards folder after done is hit. • NOTE: This application only works with Salesforce Professional edition or higher (Enterprise, Unlimited, DE, or Performance) as well as Lightning Experience. Scan to Salesforce does not support Salesforce Classic.

Data Confirmation Window

The **Data Confirmation Window** is where the data extracted from the business cards will go after the scanning process has been completed.

Data Confirmation Fields


Below are the fields in the data confirmation window and if those fields are automatically extracted from the business card or not.


Cancel Button: This button will skip the business card and not add the data to the My Contacts tab. The next business card in the batch of scanned business cards will appear after this button is pushed. The image associated with this business card will also be deleted.

Save Button: This button will confirm the data on the Data Confirmation Window and add the business card to the My Contacts Tab.

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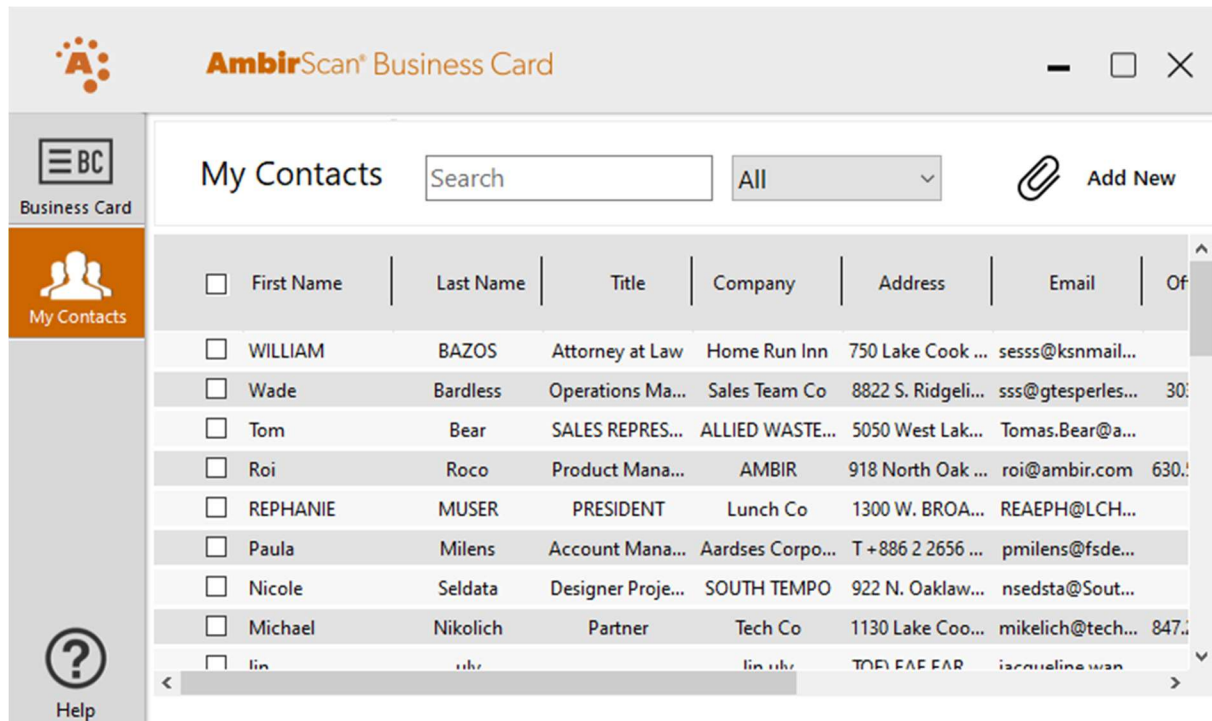
Field	Automatically Extracted
First Name	Yes
Last Name	Yes
Title	Yes
Company	Yes
Address	Yes
Email	Yes
Office Phone	Yes
Cell Phone	Yes
Fax	Yes
Website	Yes
Notes	Yes


AmbirScan® Business Card

<p>First Name <input style="width: 90%;" type="text" value="Matt"/></p> <p>Last Name <input style="width: 90%;" type="text" value="Murray"/></p> <p>Title <input style="width: 90%;" type="text" value="Product Manager"/></p> <p>Company <input style="width: 90%;" type="text" value="Ambir"/></p> <p>Address <input style="width: 90%;" type="text" value="928 North Oak Lawn Avenue
Elmhurst, Illinois 60126"/></p> <p>Email <input style="width: 90%;" type="text" value="murray@ambir.com"/></p> <p>Office Phone <input style="width: 90%;" type="text" value="630.555.4682"/></p> <p>Cell Phone <input style="width: 90%;" type="text"/></p> <p>Fax <input style="width: 90%;" type="text"/></p> <p>Website <input style="width: 90%;" type="text" value="www.ambir.com"/></p> <p>Notes <input style="width: 90%;" type="text"/></p>	<p style="text-align: center; margin-bottom: 10px;">Front of Card</p> <div style="border: 1px solid #ccc; padding: 10px; width: fit-content; margin: 0 auto;">  </div> <p style="text-align: center; margin-bottom: 10px;">Back of Card</p> <div style="border: 1px solid #ccc; height: 100px; width: 100%; background-color: #f0f0f0; margin: 0 auto;"></div> <p style="text-align: center; margin-top: 20px;"> <input type="button" value="Cancel"/> <input style="margin-left: 50px;" type="button" value="Save"/> </p>
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My Contacts

The My Contacts tab is where all scanned business card data will go. From here users can edit existing contact data, sort the contact data by the different columns, look for contacts in specific date ranges, add contacts from an image file of a business card, add a contact without a business card, send contact data to a CSV, Outlook, Salesforce and delete a contact.



Editing Existing Contact Data

To edit an existing contact you can double click on any of the contacts and the data confirmation window will open for that contact allowing you to edit the contact.

Sorting Contacts

Clicking on any of columns will sorting the contacts by the selected column.

Date Range

The Date Range Dropdown lets you choose a range of dates to show contacts that have that range as when they were created. You can set 30, 90, All or a custom date range to list contacts added in this range.

Add Contact From Image File

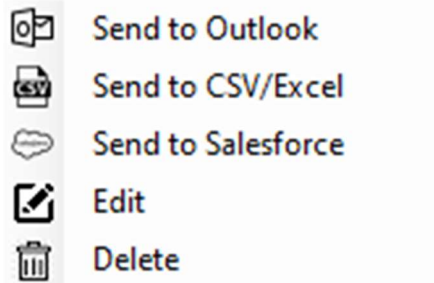
By clicking on the paper clip icon image files in jpeg, bmp or pdf format can be imported into AmbirScan Business Card the image will be process a data confirmation window with extracted info will appear.

Note: Only one business card image can be added at a time and for PDF files only the first page of the PDF will be processed.

Add a Business Card without an Image File

By clicking add new you can open the data confirmation window and manual add a contact without having an image file.

Right Click Functions



Send Contact data to Outlook

After selecting one or multiple outlook you can right click and select Send to Outlook. Once this is selected all the selected contacts will be sent to you designated outlook contacts folders selected on the home screen.

Send Contact data to a CSV file

After selecting one or multiple contacts you can right click and select Send to CSV/Excel. Once this is selected you will be prompted for a file name and destination for your CSV file containing the data of the selected contacts.

Send to Salesforce

After selecting one or multiple contacts you can right click and select Send to Salesforce. Once this is selected the contact or contacts will be sent to your sales force account. If a account matches the company name the contact will be placed in that account. If no account matches the company name the contact will be created as a floating contact.

Edit a Contact

After selecting one or multiple contacts you can right click and select Edit. Once this is selected you will see the data confirmation window for the selected contacts appear and you can edit those contacts.

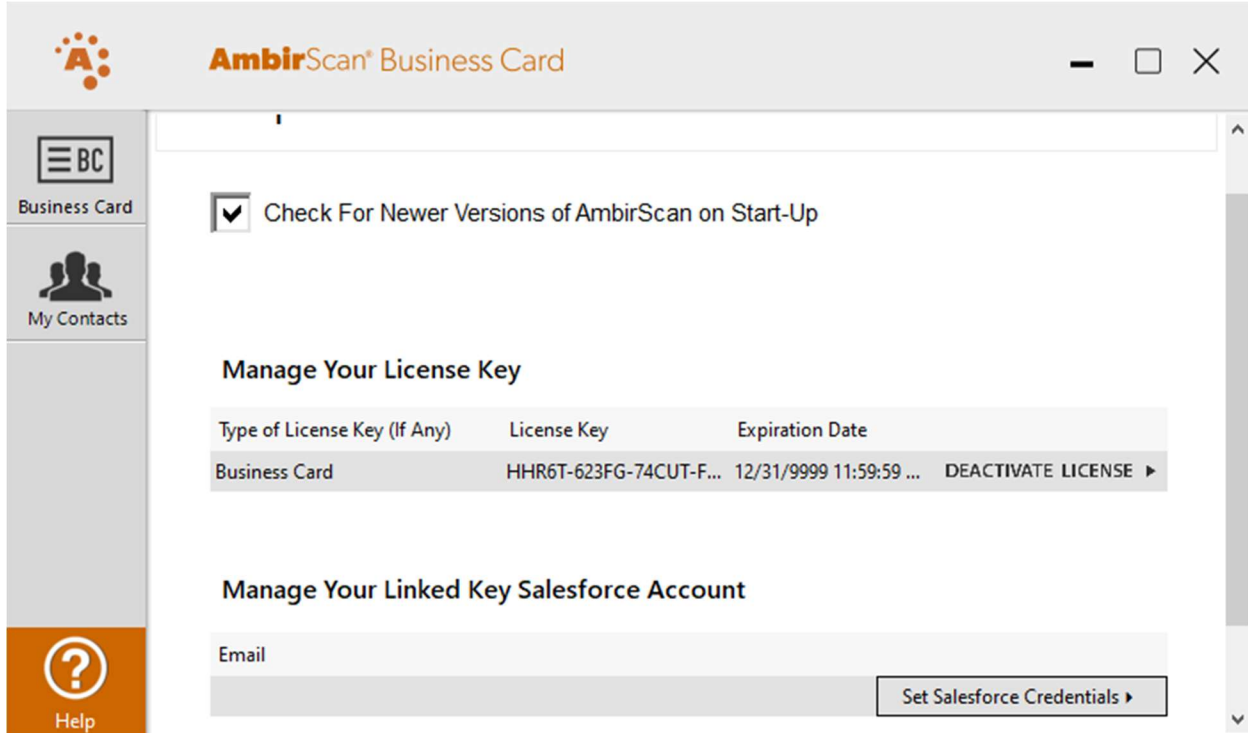
Delete a Contact

After selecting one or multiple Contacts you can right click and select Delete. Once this is selected you will be prompted if you are sure you want to delete the Contact.

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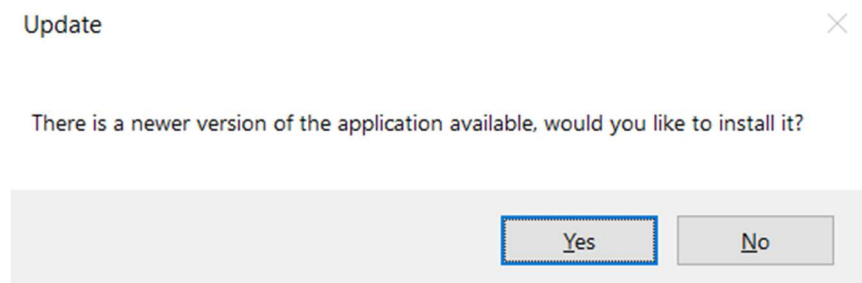
Help

The Help tab is where you can adjust your Check for Newer Version status, Calibrate your scanner, View License key number or get the link to the online setup page with FAQ's, User guide, Drivers and Support Contact Info.



Check For Newer Version

If this option is checked at startup of AmbirScan Business Card the software will check for a newer version. If a newer version is found you will be prompted to download and install the newer version. Once you click yes on the popup the download will happen in the background of AmbirScan Business Card and once the software is finished downloading you will be prompted to install the application.



Calibrate your Scanner

This button allows you to calibrate your scanner which can be done to improve the scanning of the device.

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Note: The calibration button will only appear when used with Ambir Sheetfed scanners. If you are using an Ambir Multipage High Speed Automatic Document Scanner please calibrate via the calibration wizard in your start bar or for GT series ADF scanners there is no need to calibrate.

Scanned contacts will have the contact information displayed as well as an image of the business card.

Manage Your License Key

In this section you can view your license key and if you wish deactivate the license key from this pc to move the license to a different PC.

Technical Support

For assistance with your Ambir product(s), please visit the AmbirScan [Support](#) page on our website. This site contains detailed information, along with helpful FAQs on your product.

Ambir Technical Support is available by phone and chat, Monday – Friday, 8 a.m. – 5 p.m. Central Time, excluding holidays. Phone: (630) 530 – 5400, option 3

Please have your scanner model and serial number available when contacting Support.