

## Highlights at a glance

- § Reliable contact information – no typing errors
- § Duplicate detection
- § Update function of existing contacts
- § Creating follow-up activities

è See other highlights on the next page



### System requirements:

Sage CRM 6.1 or higher  
CardScan Personal/Executive 600 or higher  
installed CardScan software

## Our other addons

**Dial IT:** Efficient call workflow for incoming and outgoing calls with ACT!

**Handheld Contact:** Wirelessly manage and sync ACT! Data

**Scan IT:** Easily scan your businesscards into your ACT! database

**Workflow IT:** Automated workflow processes in ACT!

**Search IT:** Create powerful, specific, save-able searches in ACT!

**Outreach IT:** Keep in touch with your customers and prospects effortlessly – sending them a personalized email – right from ACT! In just a few minutes

**Fetch IT:** Direct data transfer of system generated emails

**BulkChange IT:** Edit fields across multiple entries of opportunities in ACT!

**Group IT:** Manage and Search groups in ACT!

**Table IT:** Create and manage your own tables in ACT!

**Import IT:** Quickly import everything into your ACT! database

**Export IT:** Export import – ready data from ACT!

**Service IT:** Easily run installer for windows Service applications in ACT!

**Opportunity Extended:** More effective use of your opportunities – easily optimize your strategic planning

## CRMADDON Factory GmbH

*We develop according to your specifications*

# Scan IT

## Sage CRM

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## Why Scan IT?

Have you or your clients ever needed to reach someone but you can't find their business card? Or you have a business card on your desk but you don't even remember where you got it and what it's about? Do you find it annoying and time-consuming to add new contacts manually to your database or that your business card scanner software is not compatible with your CRM - system?

The basis for a successful contact management is a constantly updated and maintained database. This of course is not always easy, since the quality of the data depends on the accuracy of each CRM user. Especially entering the business card information is a time-consuming process, which many users often delay. Most of the contacts never find their way into the CRM system and disappear on the desktop. Potential customers and with them the sales opportunities get lost there.

Scan IT will help you and your sales team quickly update your CRM database with new business contacts. Scan IT lets you enter business card information directly into your CRM system using the CardScan card scanner.

As any successful salesperson knows, entering the information is only half the job. The follow up after you receive a card is just as important. Scan IT also allows you to manage a follow up for every single contact.

Scan IT is the easiest, most accurate way to enter your business cards - feature-rich and fully integrated with your CRM - system, without manual data entry or third party applications.

## Insight

## Highlights

**Direct scanning** – No additional OCR Software required.

**Activities** – Pre-define your follow-up dates and keep in touch.

**History** - As you scan your business cards, create a history with the corresponding information.

**Numbers** - phone, fax and mobile numbers will be inserted directly in the TAPI-compliant format with the country codes.

**Groups** - Define new groups and save your contacts in the right place.

**Country** – recognizes the country by the defined email addresses and phone numbers.

**Domain review** - Scan IT checks if the domain really exists. In the case of a negative test you will be able to make changes.

**Email / Domain entry** - If there is only a domain and no email address Scan IT creates an [info@domain](mailto:info@domain). If there is only an email Scan IT creates a domain entry.

**Status** – see at a glance what kind of contact it is. Is it a prospect or a business partner?

**Business card image** - save the business card (colour / black - white) on a new tab.

**Locations** – set up several scanners and send the data directly to your database with front end web communication.

**Duplicate testing** - existing contacts can be updated.

**Referred by - Feature** - who put the contact on

**Screenshot function** - with the hotkey, you can make screenshots of contact details on websites / emails and "scan" these information into your CRM - system.

**Default Values** - define default values for activities, histories, groups, referred by and status - therefore you must not re-enter again and again