

Aim: To describe how to achieve a commonly shared database of contacts with CardScan Executive.

CardScan Executive

With CardScan Executive a solution with Outlook relies on several individual .cdb files all synchronising with a central Ms Outlook Public Folder.

This solution is effective using separate .cdb files however discipline is required to manage the individual attributes of each .cdb file which can influence the centrally administered Outlook Public Folder.

One method which will help to keep the Outlook contact folder organised.

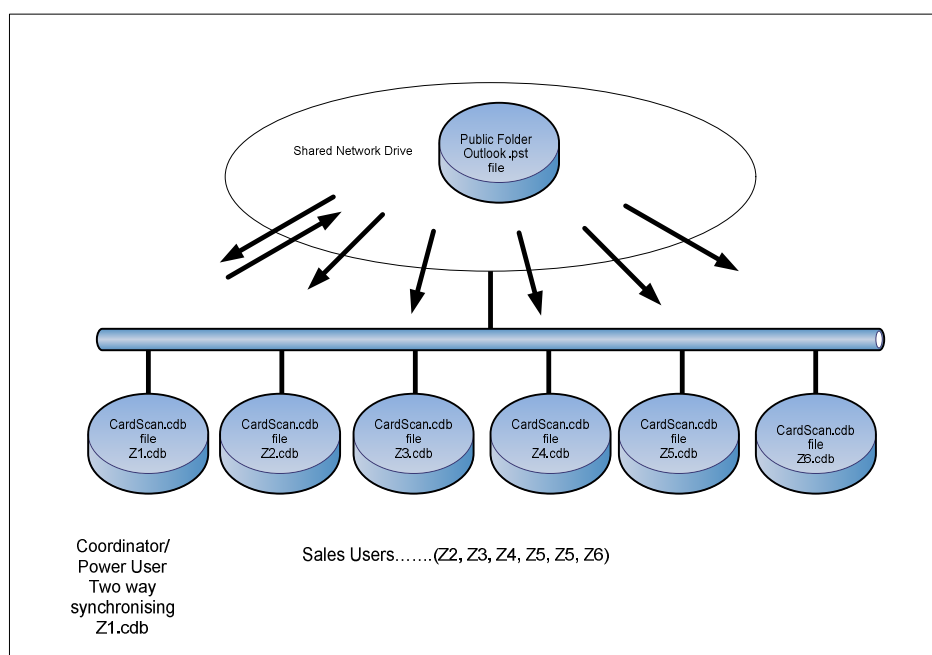
1. Enable the both ways synchronisation from a central scanner used by an office coordinator or power user.
2. All other users should have synchronisation where Outlook is the master. In this way attributes between the power user z1.cdb file and Outlook will be common and all other connections to the central Outlook .pst file will inherit the attributes of the Outlook file such as a standard set of categories.

NB: If sales users would like to use the drag and drop feature to add contacts to a local .cdb file which is synchronised with the Outlook Public Folder then care should be taken when changing the synching options for both ways synchronisation.

An alternative is to have a separate .cdb file locally which is only used by that sales user and which is not synched with the outlook public folder

Alternatively all users can have both ways syncing enabled however all users need to be aware that if records are deleted from the central file they may reappear at a later stage when one of their colleagues resynchronises with an older copy of their .cdb file.

In any case it makes sense to designate a single user, typically the person with the scanner most of the time to regularly maintain both the central Outlook .pst public folder as well as a master copy of the CardScan .cdb file using the Deduplication wizard provided in CardScan.



Written by: Riccardo Tenaglia. Abditech Pty Limited

Contact: 1300 55 88 59

Email: riccardo.tenaglia@abditech.com