Importing Business Cards Using Evernote & Capsule

Something which I am being asked all the time at the moment, is how I scan business cards and get them into my favoured CRM, so I thought I would prepare this short document to explain it, step by step.
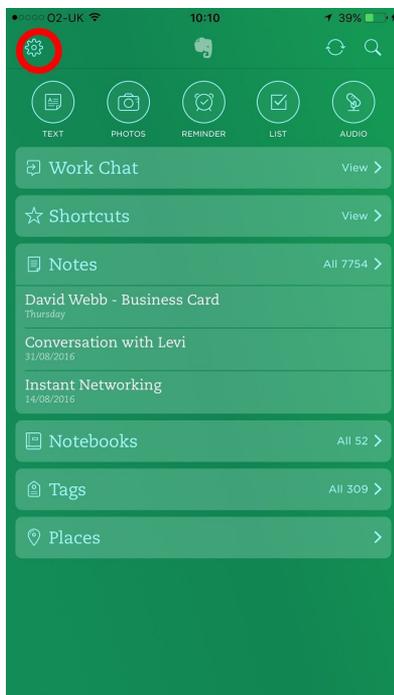
Firstly, I am working with two apps, Evernote and Capsule. I know that some of the features I mention here are in the paid for version of Evernote and I would seriously recommend getting it, it rocks my world and, as you can see from the screengrabs, I've been using it for over seven years. You also need to install both apps on your 'phone.

NB I am using an iPhone so all screen grabs are from the iOS versions of the apps I mention, they may look different on Android or Windows.

Secondly, you need to get yourself along to some networking meetings and collect some business cards from the lovely people you meet. Obviously.
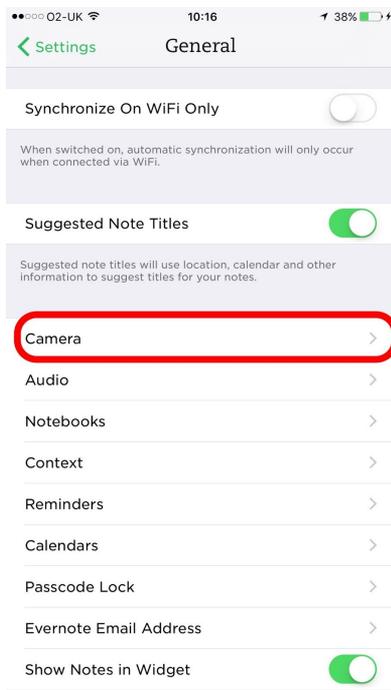
Setting up Evernote.

Evernote needs a little bit of setting up for everything to work, particularly the link to LinkedIn. Once setup correctly, you only have to scan someone's business card in, for Evernote to go off and find them on LinkedIn and offer to connect for you.

Firstly you need to get into the Evernote settings which you can find at the top left of the home screen, as shown in the diagram on the left.

Next choose the General settings.

Followed by the Camera settings.

And then Business Card settings.

Here you'll see that on my account, LinkedIn is already connected. You will have the option to enter your LinkedIn username and password and connect the app to LinkedIn, as well as choosing whether it automatically connects every time, or gives you the choice every time.

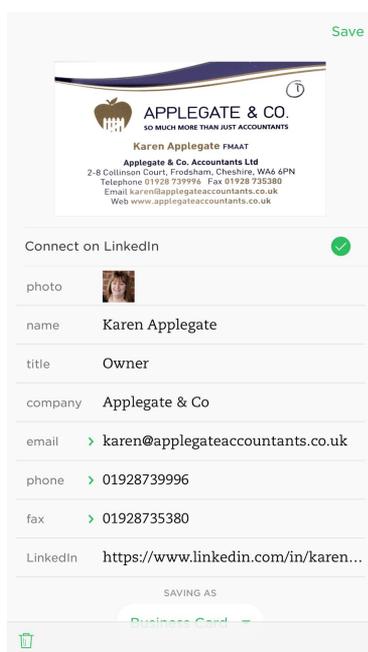Also note that you need "Save to Contacts" set to on,

That's [Evernote](#) set up.

Scanning in a business card.

Once you've collected some lovely business cards, open up [Evernote](#) and go into photos. This will switch the camera on, point it at the business card and [Evernote](#) will start looking for a document.

Before long, [Evernote](#) will find the business card and take a photo of it.
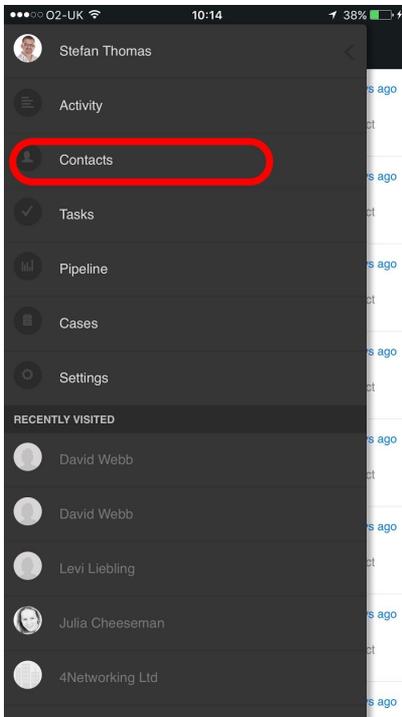

You'll then be taken to the next screen where you will see the business cards details have been read in (and you can manually correct anything incorrectly imported).

Within a few seconds, if the person is on LinkedIn, [Evernote](#) will have found them. If you have asked [Evernote](#) to automatically connect the "Connect on LinkedIn" tickbox will already be checked. If not you have the choice to do so now.
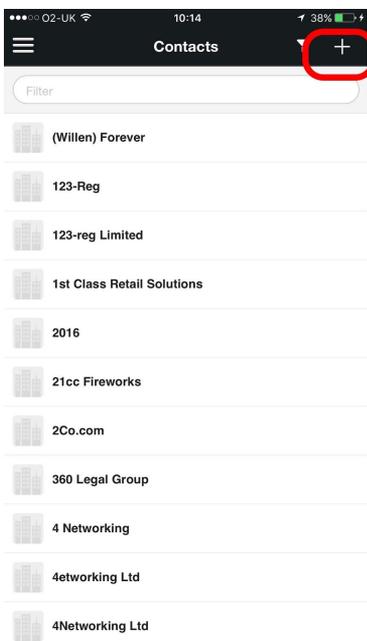
Once the details are correct, just click save. [Evernote](#) will pop up another dialog box and you can click "Done", or if you want to scan more cards "Return to Camera".

Importing the contact into <u>Capsule</u>.

Next step is to open up the [Capsule](#) app and click on the burger button top left.
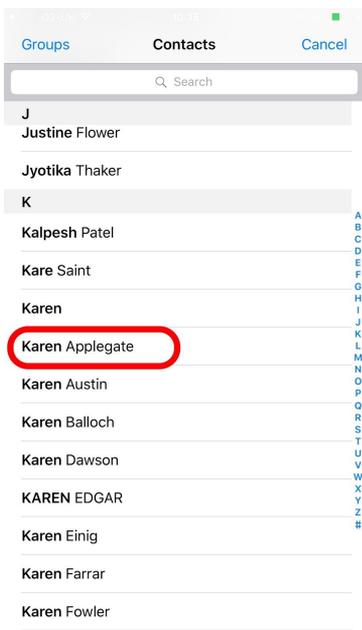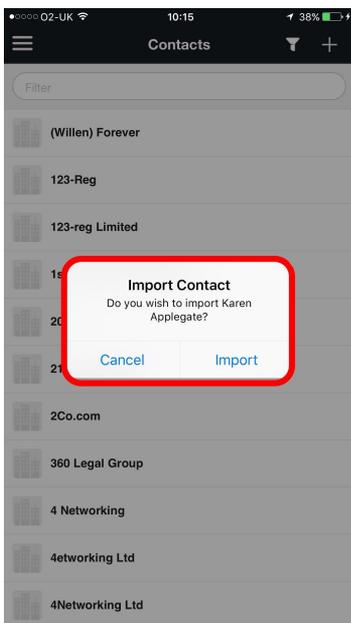

From the next menu choose Contacts.

Then choose the + sign to add a contact.

And choose Import Contact. You'll then be taken to a list of your contacts from where you can….

...choose the correct contact and then....

....confirm that you wish to import them.

And then you will see your contact has been imported and is ready for you edit and add more information either from the app, or within [Capsule](#) itself on your computer.

See, simple innit.

Honestly, once you're used to it, this whole process takes me no more than a couple of minutes per card, so after a typical 4N meeting, less than ten minutes to import and add your follow up task into [Capsule](#).

I really hope this helps, and welcome your feedback.

Stef