

# WizzForms Desktop

Auto-populating Forms and Data Capture Application



**IDScan.net**

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# Introduction

IDScan.net's WizzForms is a software application that seamlessly pairs with any program to populate forms and databases with information gathered by scanning an ID. WizzForms will recognize many different ID types such as: US and Canadian driver's license (DL) or Identification Card (ID), military ID, Common Access Card, hunting/fishing license, Canadian health card, and passport.

The information encoded in the 2D barcode (PDF417) or magnetic stripe (MRZ) of an ID contains a plethora of data. Here is a partial list of the fields you can capture:

Last Name	Address2	Birthday	Height
First Name	City	Drivers License Number	Weight
Middle Name	State	License Expiration Date	Hair Color
Address1	Zip Code	Gender	Eye Color

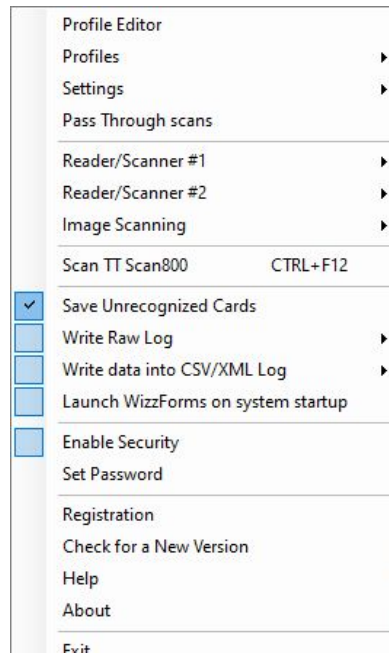
WizzForms Plus has the ability to capture the front and back images of an ID or credit/debit card. Doing this will link the images to the ID that you scan, thus creating a more complete profile that can be viewed in the WizzForms Report Viewer.

## System Requirements

Minimum	Recommended	Required for Authentication
Windows 7 with .NET Framework	Windows 10 with .NET Framework	Windows 10 64-bit with .NET Framework
Dual-Core Processor	Dual-Core Processor	Quad-Core 64-Bit Processor
4GB Memory	4GB Memory	8GB Memory

## Supported Scanners and Readers

- E-Seek M200
- E-Seek M210
- E-Seek M250
- E-Seek M260
- E-Seek M280
- Gemalto AT9000
- Gemalto AT10K
- Gemalto CR100/M
- Gemalto CR5400
- Gemalto KR9000
- Gemalto QS1000
- IDS 7017
- Koamtac KDC devices



## WizzForms Menu

WizzForms runs in the system tray instead of in an active window. The user can access the menu for WizzForms by **right clicking** on the **WizzForms icon** in the system tray, which is usually located at the bottom right of your screen.

## Installation

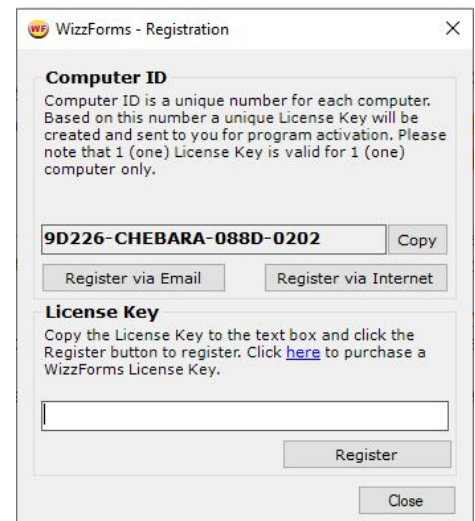
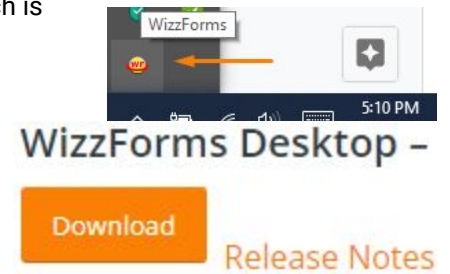
Downloads: [WizzForms Desktop software download](#).

- 1) Download the installation file from the link above or visit our website [here](#).
- 2) Run the SetupWizzForms installer to install the software.

License Activation:

- 1) Upon launching the WizzForms software, you will be prompted to register. *If not prompted to register, right-click* on the **WizzForms icon** located in the system tray (typically located at the bottom right corner of your screen) and select **Registration**.
- 2) Using one of the options provided (**Register via Email** or **Register via Internet**), send us your unique Computer ID.
- 3) A License Key will be emailed to you within one business day, which you can then copy and paste into the License Key field.
- 4) Press Register. You can view the status of your registration by selecting **About** from the WizzForms menu.

The full version of WizzForms is available for purchase [here](#).



## Scanner Setup

Most drivers can be conveniently found on our [website](#).

Preferably, install the driver for your scanner before plugging it in.

If you aren't able to find the driver for your scanner, please use the form on the page for help.

*Always have your scanner plugged in before launching WizzForms.*

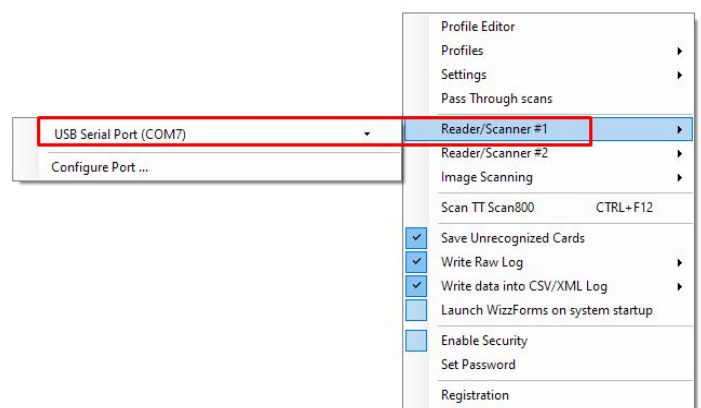
## E-Seek

Installation:

- 1) Plug the scanner into any available USB port.
- 2) Download driver, **right-click** the **setup file**, and choose **Run as administrator**.
- 3) Follow the prompts to install the driver.
- 4) Restart WizzForms.

Setup:

- 5) **Right-click** the **WizzForms icon** in your System Tray and select **Reader/Scanner #1** or **#2**.
- 6) From the dropdown menu, select the available scanner that reads **USB Serial Port (COM#)**



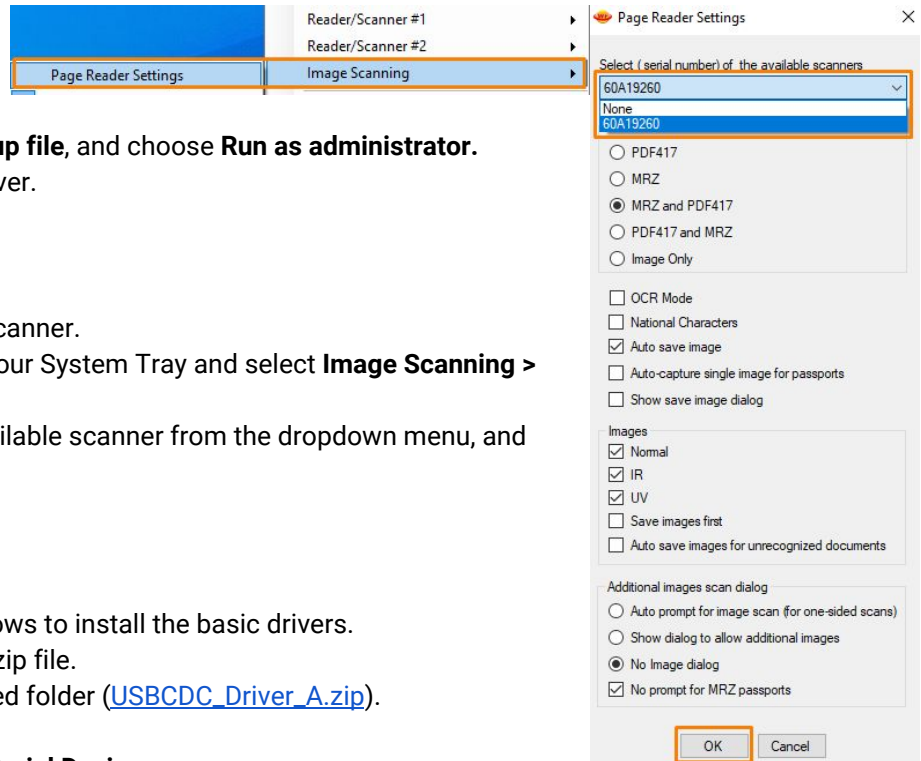
## Gemalto

### Installation:

- 1) Plug the scanner into any available USB port.
- 2) Download driver, **right-click** the **setup file**, and choose **Run as administrator**.
- 3) Follow the prompts to install the driver.
- 4) Restart WizzForms.

### Setup:

- 5) Wait for the solid blue light on the scanner.
- 6) **Right-click** the **WizzForms icon** in your System Tray and select **Image Scanning > Page Reader Settings**.
- 7) Select the serial number of your available scanner from the dropdown menu, and then press **OK**.



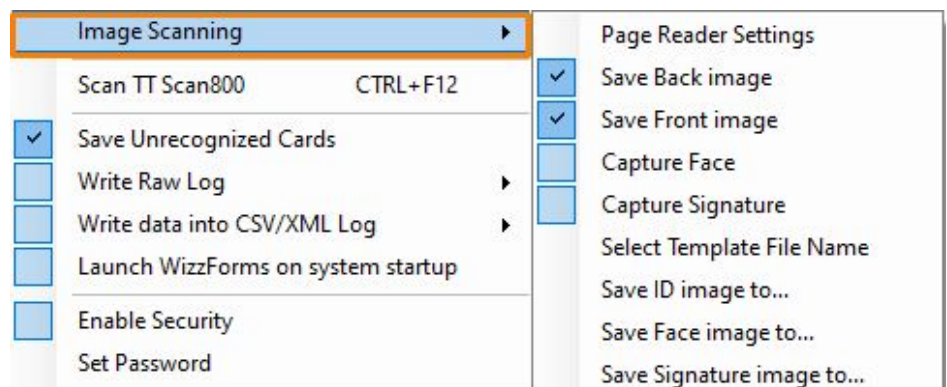
## ID Tech MiniMag II

- 1) Plug the scanner in and allow Windows to install the basic drivers.
- 2) Download the driver - this will be a .zip file.
- 3) Extract the files from the downloaded folder ([USBCDC\\_Driver\\_A.zip](#)).
- 4) Open **Device Manager** on your PC.
- 5) Click on **Ports** and **right-click USB Serial Device**.
- 6) Select **Update driver**.
- 7) Select **Browse my computer for drivers**.
- 8) Point to the **previously extracted folder**, then click **OK**.
- 9) Select **Next** and Windows will install the scanner with the required drivers.
- 10) **Right-click** the **WizzForms icon** in your System Tray and select **Reader/Scanner #1** or **#2**.
- 11) From the dropdown menu, select the available scanner that reads **USB Serial Port (COM#)**.

## Additional Setup Settings

### Image Scanning

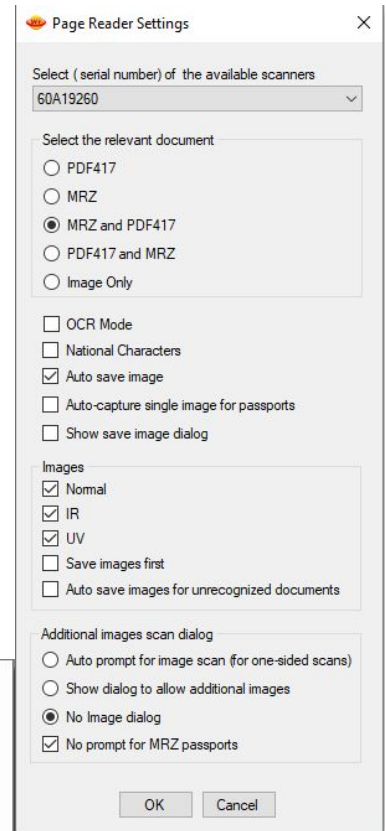
There are several options that can be enabled for scanners that are capable of capturing images. These options can be found under Image Scanning in the WizzForms menu.



## Page Reader Settings:

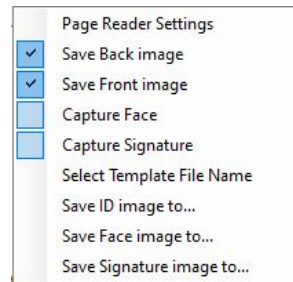
These are the general reader settings for scanners. Some models will indicate their ability to scan from this menu (Covered earlier in Scanner Setup).

- The dropdown menu allows the user to select which scanner is active. Scanner must be selected to work. COM port scanners are selected in a different location (see Scanner Setup).
- "Select the relevant document" allows the user to decide what format the scanner will read. MRZ is for magnetic strips and PDF417 is for 2D barcodes. In the options that include both, the first one will take priority if both are present.
- Unchecking "Show save image dialog" will remove the prompt to "ok" every time an image is saved.
- "Images" allows the user to choose if Normal, IR, and UV images are taken, as well as, if images for unrecognized documents are saved.
- Auto prompt for image scan for one-sided scans will prompt the user to flip the document over when using a scanner that can only image one side at a time.
- No Image dialog will remove all dialog regarding images. The images will be taken and saved without any hassle or confirmation messages.



## Save Back and Front Image of an ID:

WizzForms has the ability to save an image of the front, back, or both sides of an ID. Navigate here and click to enable the front and back images to be saved.



## Capture Face:

WizzForms allows you to capture the face image from an ID. This will crop out the rest of the ID and save an image of just the face from the ID. Click to enable this feature.

This will crop out the rest of

## Capture Signature:

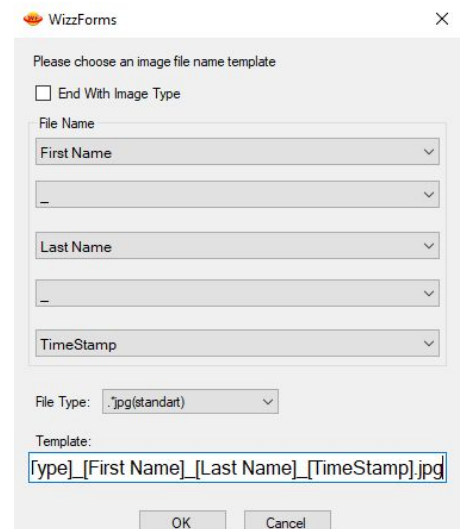
WizzForms allows you to capture an image of the signature from the ID. This will crop out the rest of the ID and save only an image of the signature located on the ID. Click to enable this feature.

## Select Template File Name:

WizzForms allows for customization of the file format when saving an image. File type options are .jpg, .png, .bmp, or .tiff. The user can also select how the filename is created. ID number, First or Last name, and Time stamp can all be selected and the order can be selected.

## Save ID image to / Save Face image to / Save Signature image to:

These options allow the user to choose the location images are saved on the computer. Select the option, specify the path, and click ok. The three different





images can be stored in 3 different locations or the same location. The default path is **C:\ProgramData\Nautilus\WizzForms\Images**.

## Windows Permissions

Account permission settings play a very important role in the proper functionality of WizzForms.

In a multi-user environment, make sure the administrator has granted the read and write permissions for the following path: **C:\ProgramData\Nautilus\WizzForms**.

If the user receives an error that *a specific path is denied*, then it is because these permissions are not properly configured.

**\*\*If the user changes the directory that images save to, then read and write permissions must be allowed for the chosen directory as well.\*\***

## Creating a Profile

### Profile Editor

From the WizzForms menu, select the top option, **Profile Editor**, to begin mapping a custom profile.

Creating a profile requires some trial and error. The user needs to examine the form or application that will be filled out, and then choose the proper inputs to send. These inputs will automatically fill in areas where the user would normally type, and the user will need to include inputs to navigate through fields.

The **Expression options** at the bottom left can be used to define the output in a specific way - selecting None will output the data normally.

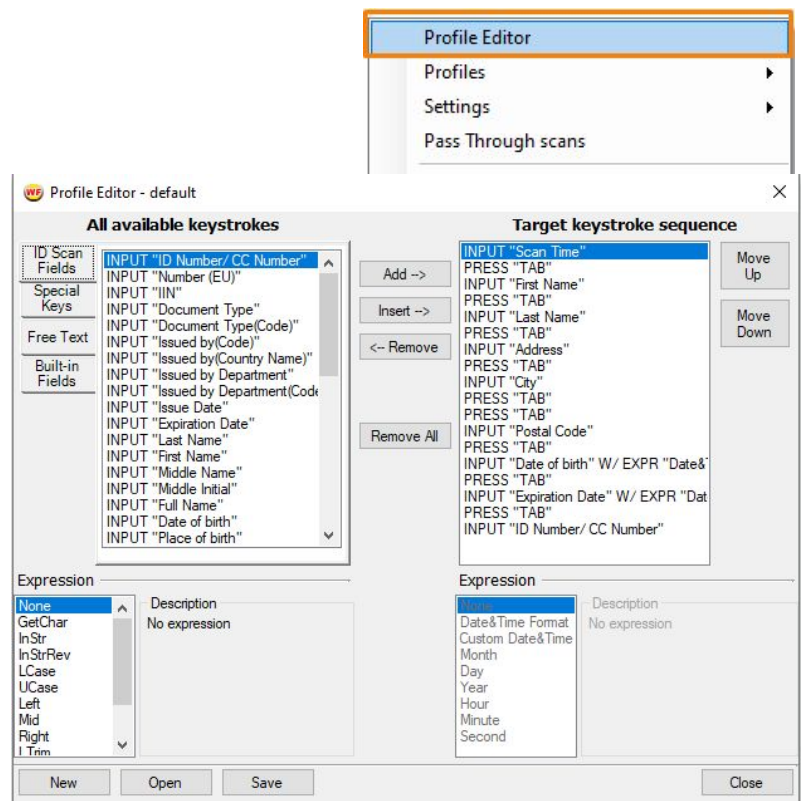
The Profile Editor contains 4 different sets of inputs:

- **ID Scan Fields:**

These are all inputs that will parse data directly from the ID being scanned and enter that information into the form. Examples include Name, ID #, Age, Gender, etc... Pass through Raw Scan is an advanced input method which will input all of the raw data from the ID.

- **Special Keys:**

These are all keyboard inputs which will mainly be used to help navigate the form in order to insert the ID Scan Fields where they need to go. Examples include ENTER, TAB, ESC, UP ARROW, etc... Custom Keystrokes not included in the list can be added through the Special Keys menu. Just select the empty box above **"add custom keystroke,"** press a key combination, then press add custom keystroke. This keystroke will now be available in the list.



- Free Text:

This input allows the user to enter any text which will be inserted into the form. For example, WizzForms could type "Event ABC in New York, NY" every time an ID is scanned for a specific event.

- Built-in Fields:

These inputs have very specific uses:

**RETURN "Now"** inputs the current date (mm/dd/yyyy) and time (to the second).

**RETURN "Today"** inputs the current date and 12:00:00 AM.

**RETURN "UserID"** inputs the currently logged in username for the computer WizzForms is running on.

**ACTIVATE WINDOW** allows the user to specify a program, and WizzForms will choose that program window, make it the active window, then start inputting the information into it. **ACTIVATE WINDOW** has a sub-feature labeled *Child Window* which allows WizzForms to select a window within a specified program (*parent window*) to activate.

**DELAY** allows the user to stop WizzForms: the *Time* option sets a specific period of time (in milliseconds) to wait; and the *Key press* option will stop WizzForms until the assigned key is pressed.

## Customizing a Profile

Start the profile by selecting **New** at the bottom left, and assigning a name to the new profile.

For the WizzForms Example Page that will be shown below, follow this [link](#); or check this box during installation

Would you like to open a web page with Setup video, demo, and instructions?

WIZZFORMS EXAMPLE PAGE

Scanned Date/Time	<input type="text"/>		
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Address:	<input type="text"/>	City:	<input type="text"/>
State:	<input type="text"/>		
ZIP/Postal Code:	<input type="text"/>		
Date of Birth:	<input type="text"/>		
Expiration Date:	<input type="text"/>		
ID#	<input type="text"/>		

The first step is to examine the document or form being used. Take note of all the fields that need to be filled in; these will be the **ID Scan Fields** that need to be added to the profile. *In the above example: "Scan Time," "First Name," "Last Name," "Address," "City," "Jurisdiction/State," "Postal Code," "Date of Birth," "Expiration Date," and "ID Number."*

Next, figure out which keyboard keys navigate through the form and how many key-presses are required to reach the next field. These will be the **Special Keys** used. *In this example, the TAB key navigates between the different boxes, and pressing it once moves to the next box. This means that there will need to be one "TAB" between each ID Scan Field in order to navigate properly. (If multiple key presses were required then multiple "TAB"s would need to be included.)*

The cursor always needs to begin in the first field, so make sure to click on the first box before running the scan. *In this example it is the Scanner Date/Time field.*

## Sequence of Inputs:

1. The first box needs to be the first **ID Scan Field** included in the profile. Click on the **ID Scan Fields** tab, and select the desired input then press **Add**. *In this example: "Scanned Time."*

2. Next make sure to include a **Special Key** to navigate to the next field. Click on the **Special Keys** tab, and select the correct input then press **Add**. *In this example: "TAB."*
3. Now insert the next **ID Scan Field** needed. *In this example: "First Name."*
4. Once again remember to include a **Special Key** next in order to move to the next box. *In this example: notice how "TAB" now moves across to Last Name and not down to Address. This is a good example of how WizzForms requires trial and error: the user will need to make sure to test how the Special Keys navigate through the form.*
5. The keystroke sequence will continue in this format (**ID Scan Field, Special Key, ID Scan Field, Special Key,...**) until the last **ID Scan Field** is inserted. *In this example: "ID Number/CC Number."*
6. After the **last ID Scan Field**, there is **no Special Key** needed since all fields are complete.

Once you have completed a profile, click **Save** at the bottom. Make sure to select the profile (instructions below) and test it to ensure it works properly before utilizing it.

## Choosing a Profile

The profile you have selected will be used for every scan. To choose this profile **right-click** on the WizzForms icon to access the menu, navigate to **Profiles**, and then choose the profile you want from the list. Any custom profiles will be included here along with the default profiles.

**\*\*If you wish to select a different profile for each scan, there is a setting for this. Navigate to **Settings** and then check **Select Profile for every scan** from the list.\*\***

## Settings

There are a multitude of options that can be turned on or off through the Settings drop down menu.

## Credit/Debit Card Interface

The Credit/Debit Card interface is a feature specific to **WizzForms Plus** and the **M280 scanner**. It allows the option to link images of an ID and credit/debit card to a specific customer profile in order to combat chargebacks and fraud. WizzForms encrypts the ID and Credit Card data. This data can then be used to generate reports with the images attached using the **WizzForms Report Viewer**. There is a drop down menu for Credit/Debit Card interface with a single option: **Data Source**.

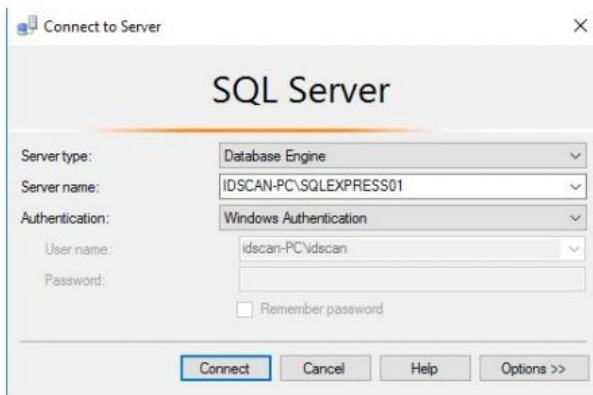
**\*Important:** This feature is designed to work with the E-Seek M280 scanner. This scanner is available for purchase from our website [here](#).

## Data Source:

To use the Credit/ Debit card interface, the data source will have to be set using SQL Server Express and SQL Management Studio. Alternatively, if SQL Server is already set up for the establishment, the existing SQL server can be tied into WizzForms. [SQL Server Express](#) and [SQL Management Studio](#) can be downloaded from Microsoft's website (links included in the names above).

**\*Important:** SQL Server 2016 only supports Windows 8 and above. If running Windows 7, please download SQL Server 2014 found [here](#).

After installing both applications, run SQL Management Studio. Management Studio will automatically assign a server name to the computer, see image below:



The options are to either use **Windows Authentication** or **SQL Authentication**. *\*Be sure to take note of the server name, as it will need to be input into the address field in WizzForms.\**

Navigate back to **Data Source** within WizzForms and enter in the **server name** and create a **database name**. Select the correct Authentication, hit **Deploy database**, then **OK**.

## Station Name

Station name allows the administrator to name the current workstation in order to more easily identify its purpose and location. For example, let's say there are two stations, one located on the north end of the building and the other on the south: the station names could be North Station and South Station.

## Custom File Names

This setting allows the designation of custom file names. The user will set a specific file name, and WizzForms will assign this name to any History Log files and Image/Face/Signature image files created.

*\*This setting will override the Select Template File Name setting found in the Image Scanning drop down menu.\**

*\*To assign a name to History Log files, Write data into CSV/XML Log must be enabled.\**

## ID Validation Yes/No

This setting enables the verification of documents and the LED notification for Gemalto CR5400, AT9000, and AT10000. The verification of documents includes checks such as the expiration of a document, a parser-specific data validation, and the existence of UV marks.

**This requires the WizzForms Authentication Add-on and more specialized setup and configuration. Contact your account manager or [sales@idscan.net](mailto:sales@idscan.net) to inquire about WizzForms with Authentication.**

## Set Valid Age

WizzForm allows the option to set the valid age when scanning an ID. This provides flexibility to meet any age restriction (18, 21, 25, etc...).

## Verify Valid Age

This setting enables the age verification feature built into WizzForms. Every ID scan will have the age verified against the valid age set above.

## Select Profile for every scan

This setting will prompt the user to choose a profile for each scan. This allows for the use of multiple profiles, which is especially important when populating multiple forms or scanning different customer types (such as new, returning, VIP, etc...).

## Profile Auto Mapping

The **Profiles Mapping Manager** allows WizzForms to detect which application is active and use the specific profile associated with that program.

- **New Mapping** begins the process of custom profile mapping, click on the new selection in the list below to begin.
- **Delete Mapping** will delete the selected mapping from the list below.
- The **Window Title**: property specifies the title of the application window WizzForms will detect.
- **Select/Identify Window** allows the user to automatically specify the title of the window by left-clicking on the desired application. The **Profile**: property designates which profile from the drop down menu will be used when scanning into the designated application.
- The **Matching**: profile determines how WizzForms searches for the specified program window. **“Contains”** will search for any program containing the given title in its name; **“Startswith”** will choose any program where the name starts with the specified title; and **“Equals”** will only search for an application with the exact title.
- **Default Profile** sets the default profile to be used when the program specified in the mapping is not active.
- **Save and Close** will save this mapping, and WizzForms will now be able to automatically detect the application and choose the appropriate profile.

The screenshot shows a 'Profiles Mappings' dialog box. At the top left are two buttons: 'New Mapping' and 'Delete Mapping'. Below them is a list area with one entry: 'Window: Title' and 'Profile: Blank'. Underneath is the 'Mapping Properties' section, which contains: 'Window Title: Title' with a 'Select/Identify Window' button to its right; 'Profile: Blank' with a dropdown arrow; 'Matching: Contains' with a dropdown arrow and a 'Check Parent Window' checkbox; and 'Default profile:' with a dropdown arrow. A green 'Save and close' button is located at the bottom right.

## Run Profile on unrecognized scan

This feature was designed to work when the image of the ID needs to be scanned first and no additional data parsing needs to take place. Scanning the image first creates a file called Unrecognized.jpg.

## Hide balloon tips

This will disable Windows from displaying notifications or balloon tips when WizzForms processes a scan.

## Remote Machine

Enable Remote Machine if a remote environment configuration is needed.

## COM Port Output

This setting enables sending data from a reader to a selected COM port through WF. **COM Output Settings** determines what data will be sent and the format of this data.

*\*This option requires a COM port bridge. A COM port bridge must be installed separately\**

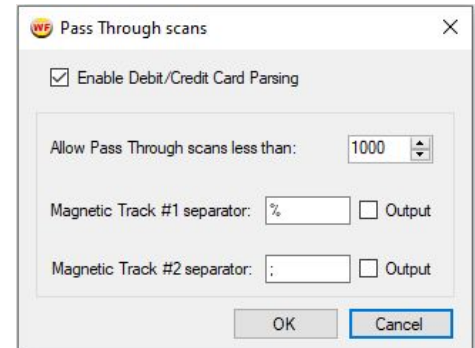
## Pass Through Scans

### Enable Debit/Credit Card Parsing

This allows for the parsing of debit and credit cards. Enable to begin scanning debit/credit cards.

### Allow Pass Through scans less than:

This enables the capture of the raw data of a scan. This is helpful when scanning loyalty cards, company and student IDs, and other non-government issued cards. The character set stored in the identifier differs greatly, so the recommendation is to set the value to 3000.



## Scan TT Scan800

This initializes a scan on the TT Scan800, which is a specific scanner that is rather old now. This scanner will not work with WizzForms normally, and the user will need to use this option.

*\*This option will do nothing unless using the TT Scan 800 scanner\**

## Save Unrecognized Cards

If the ID scanner is not reading the ID correctly, check this option, and send the file to [support@idscan.net](mailto:support@idscan.net). The file can be accessed by navigating to **Write Raw Log > Open Folder**.

*\*This setting is used for troubleshooting purposes. This setting is used to troubleshoot issues with parsing data from an ID. If using this option, also use the **Write Raw Log** option\**

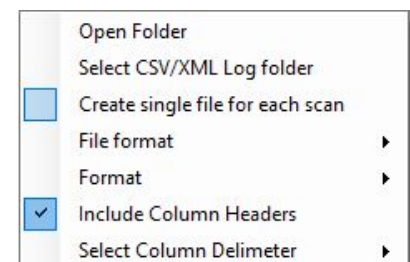
## Write Raw Log (Troubleshooting)

If the scanner is not working properly, enable this feature, scan an ID, and email the file to [support@idscan.net](mailto:support@idscan.net). This file can be found by navigating to **Write Raw Log > Open Folder**.

*\*This setting is used for troubleshooting purposes. This setting is used to troubleshoot most issues that occur with the scanner. If using this option, also use the **Save Unrecognized Cards** option.\**

## Write data into CSV/XML Log (Troubleshooting)

In addition to importing the data into any web form or application, this setting allows the parsed data to be saved as a CSV, XML, or TXT file into a specified folder. All data can be stored in one single document, or each scan can be saved as an individual file.



### Open Folder

This opens the folder where the logs are saved.

## Select CSV/XML Log folder

This allows the user to define the specific location the logs will be saved.

*\*The default location is **C:\ProgramData\Nautilus\WizzForms\History Logs\****

## Create single file for each scan

Enable this option to create a unique log file for each scan; otherwise, all data will be stored into a single log file.

## File format

Select the specific file type with this option: CSV, XML, or TXT

## Format

This allows the format of the data in the log to be customized. **Default** will set the format to the default, and **Custom** will open a text document showing what data is stored in what order. To change the format just edit this notepad document: change the order, remove data, etc...

## Include Column Headers

This will include a title for each column in the log file.

## Select Column Delimiter

This option allows the choice between a "comma" or a "tab" as the delimiter for the data in the log file. A delimiter is the type of keystroke separating different information. "Comma" will place a comma between each bit of information, and "tab" will place a tab between the information. This is useful when trying to customize the format even further.

## Launch WizzForms on system startup

Enable this to launch WizzForms when the computer is turned on. This will ensure WizzForms is relaunched after restarting the computer as well.

## Enable Security

This setting locks all the settings in their current state. The user will be able to scan IDs but not change any settings. This feature can only be turned off with the correct password. *\*If there is no password set, enabling this feature will prompt the user to create a password. Once the password is set, the only way to change the password is by selecting **Set Password**.\**

## Set Password

This option allows the user to change the current security password. Click this option, enter the old password followed by the new password, then click ok. To remove the password altogether, enter the old password and leave the new

password blank.

## **Registration**

This option is used to register WizzForms and acquire a fully licensed version.

*\*See the "License Activation" section under the "Installation" heading in the beginning of this document.\**

## **Check for a New Version**

This will check for a new version of the WizzForms software, it will also display the current version installed. There is a link to the download page if a newer version of WizzForms needs to be acquired.

## **Help**

This feature provides a downloadable copy of this manual.

## **About**

This feature will give general information about the type of product, the version of Wizzforms installed, the registration status of the software, and the support teams info. Feel free to call or email our support staff for any further questions.

## **Exit**

This will close WizzForms.

## **Contacts:**

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