ScanBizCards

Snap. Touch. Connect.

Email Signature Captures
iOS Guide

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ScanBizCards Enterprise Email Signature Capture iOS Guide

Overview

A lot of contact information gets obscured within the emails exchanged by salespeople with their prospects, partners or colleagues. To tap this contact information, ScanBizCards introduced Email

Signature Capture feature for its Enterprise app – an app that is used by more than 82000 businesses to boost their sales productivity.

Email Signature Capture feature will add to this productivity multiple times by continuously fetching in new contact information.

Email Signature Capture scans your connected email accounts for email signatures and allows you to save them into your mobile device and your email account contact list along with exporting them to your Salesforce CRM in a few simple steps.

This guide will help you to understand how to use Email Signature Capture feature to get new contacts into your sales funnel quickly and smoothly. Follow the step by step procedure to get started.
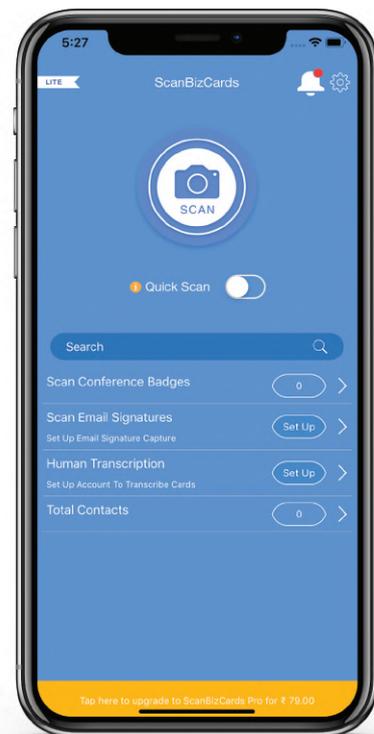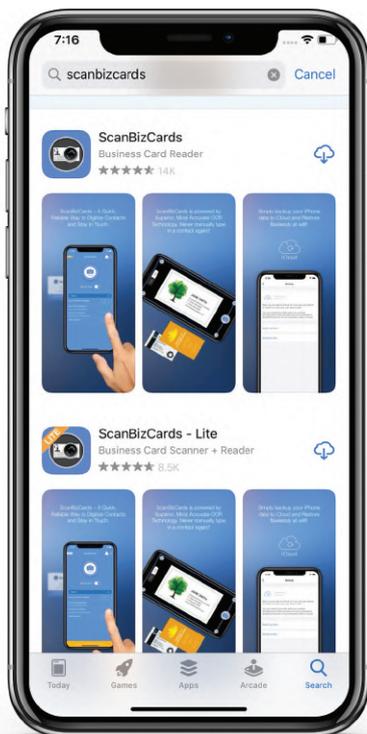
Export Contacts from Email Signature Capture to Salesforce
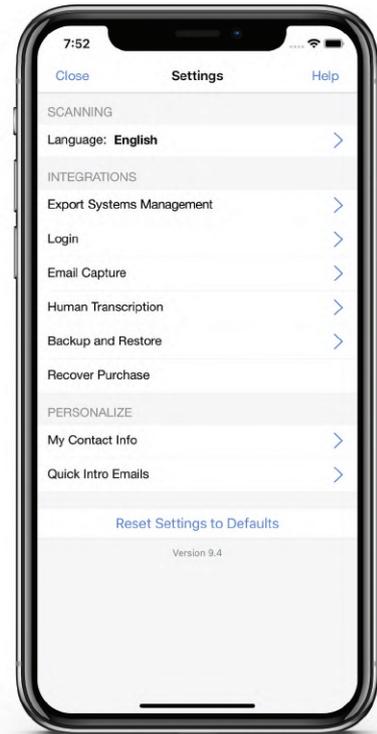
Prerequisites

1 SBCE package should be installed by the Salesforce admin.

2 The Salesforce user must have a ScanBizCards Enterprise license.
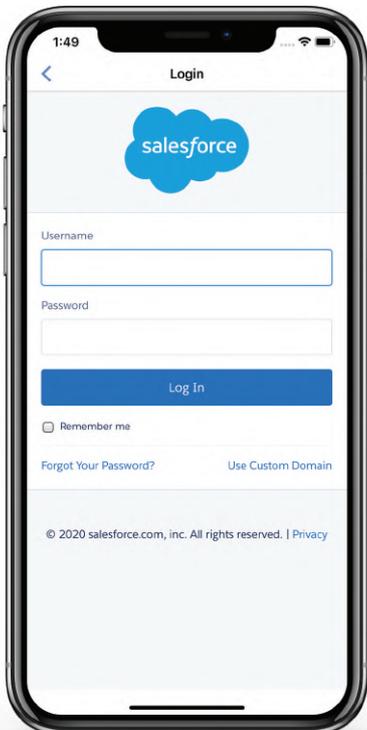
Steps to Export Email Signatures

1 Install the ScanBizCards Lite app from the app store

2 After installation, launch the ScanBizCards mobile application.

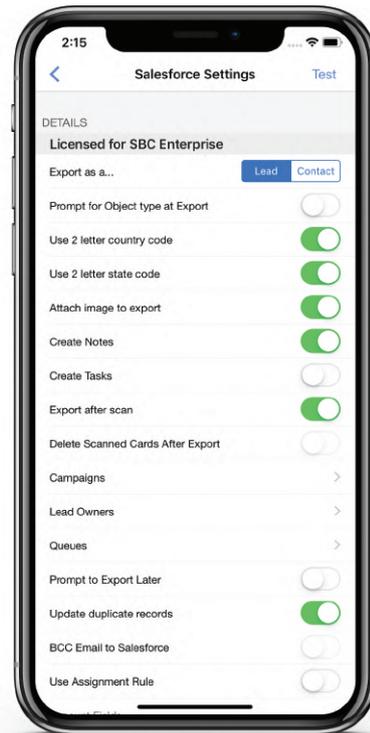**3** Go to the Settings screen from the top right gear icon.
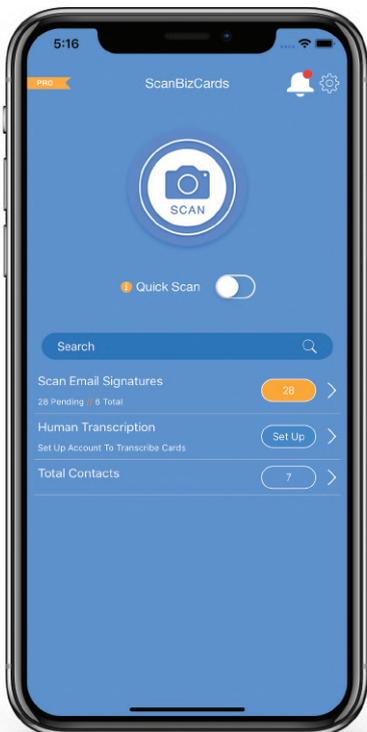

4 Tap on Login and then select Salesforce.

5 Login to Salesforce with your ScanBizCards Enterprise credentials.

6 Once you've logged in, all settings will get downloaded on your mobile device.

Now you can access these settings under CRM login and then you are requested to select Salesforce further.
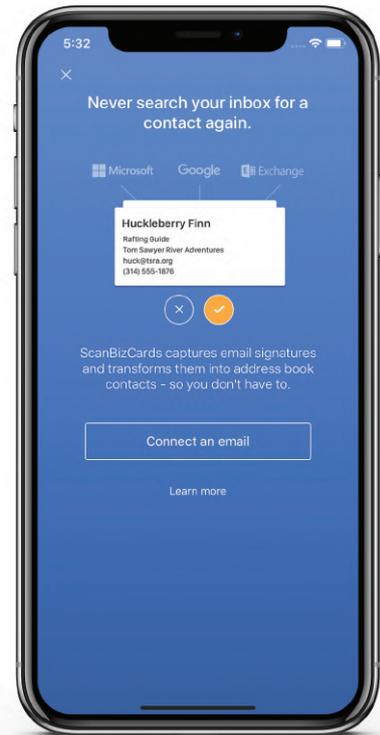
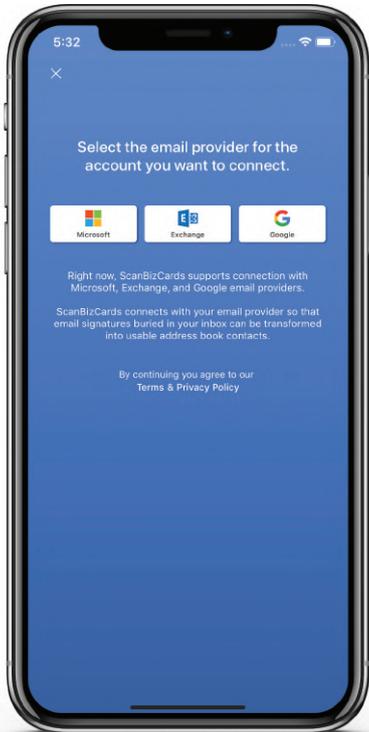

7 Navigate back to the Home screen.

8 Go to Scan Email Signatures and tap on Set Up.

9 Tap on Connect an email.

**10** Choose the email account you wish to connect (Microsoft/Exchange/Gmail)

11 After selecting the email account, enter your email credentials. This will create an OAuth connection between the ScanBizCards app and your email account.

** This will enable our ScanBizCards application to extract the signatures from the incoming emails that reach your inbox. We retrieve these emails from the user account. A software component reads the email (no human intervention) and looks for the email signature, if there is any, and then discards the email. If there is an email signature, the contact information is extracted and stored. However, the email content is not stored anywhere.

12 The email signature capture process will begin, and initially, our app will try to capture the email signatures from the emails that you received in the last 30-45 days. It will take a few minutes to finish this process.

** This is only a one-time activity. Once all the old email signatures from the past 30-45 days have been captured, then we will keep on adding new signatures from the future incoming emails.

13 After the email signature capture process is finished, the extracted email signatures will be available in the Email Captures.
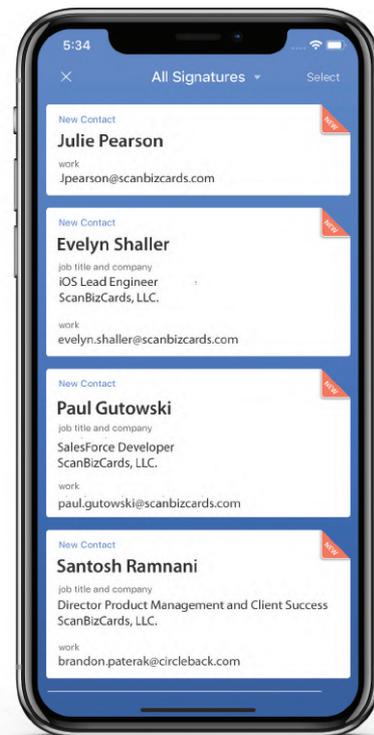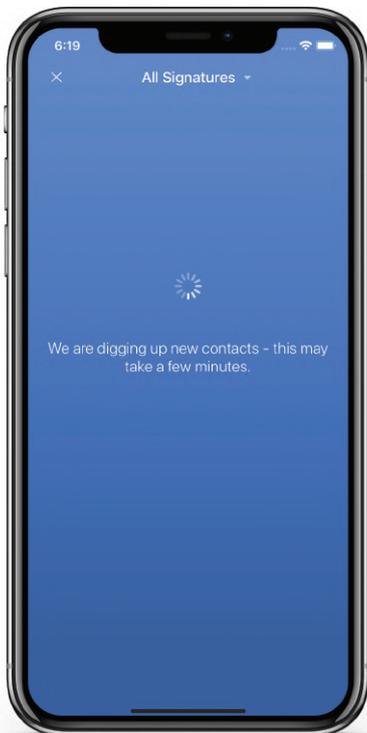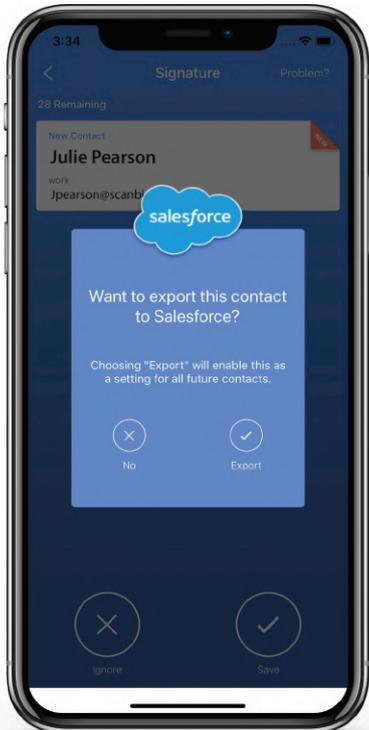
**14** From the extracted signature list, open any signature to access the signature details.

15 You will get two options - Save and Ignore.

Note: If you tap on the Save button, a popup will appear with two options - "No" and "Export" on the list or on the contact detail screen, whichever is open.

16 If you select 'No', the email contact will be simply saved into your email source account contact list.

If the user decides to export the contacts now or has mistakenly selected NO, the user can then select the email capture option from the settings menu.
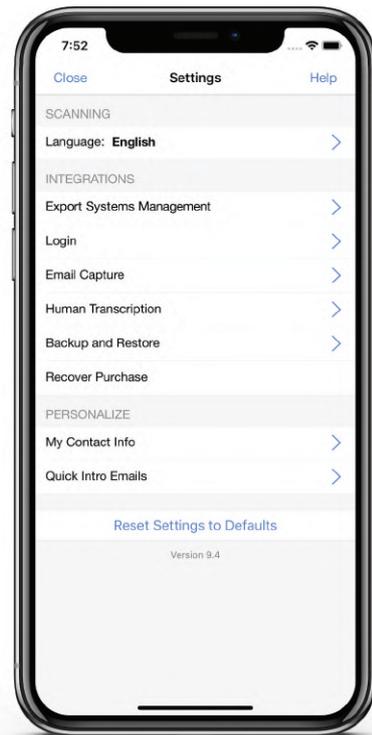
Now the user can manually turn the Auto Export to Salesforce option ON and continue the export process.

17 To export the contact, select Export.

- You will see two options, Ignore and Save, in the background.
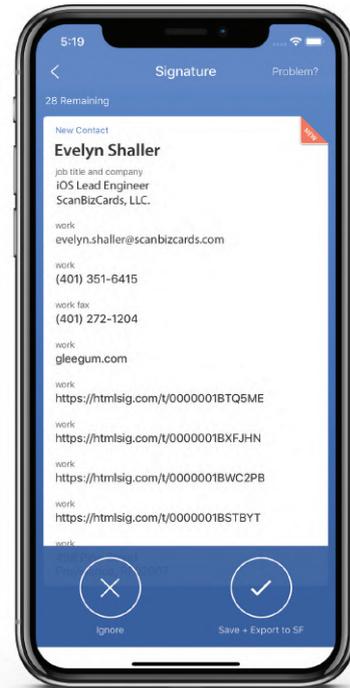
- As you choose Export, the Save tab in the background now changes to Save + Export to SF. Tap on Save + Export to SF to initiate the export process.

- If a single contact was selected, a success message will appear after the export process is complete. For multiple exports, go to the next section.
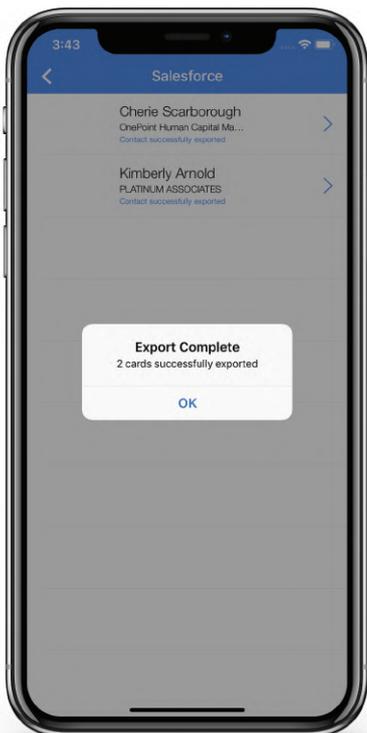
- Exported contact will now be visible in your Email Source Account contact list, Salesforce Web, and in the Email Capture Folder in the ScanBizCards app.

Batch Export

- Select multiple signatures from the email signature list and tap on Save + Export to SF to initiate the export process.
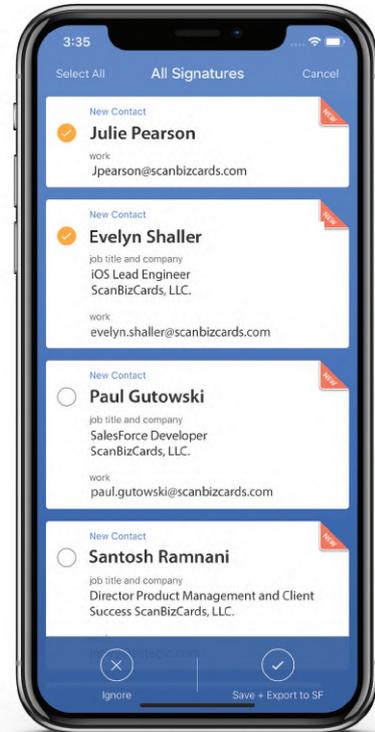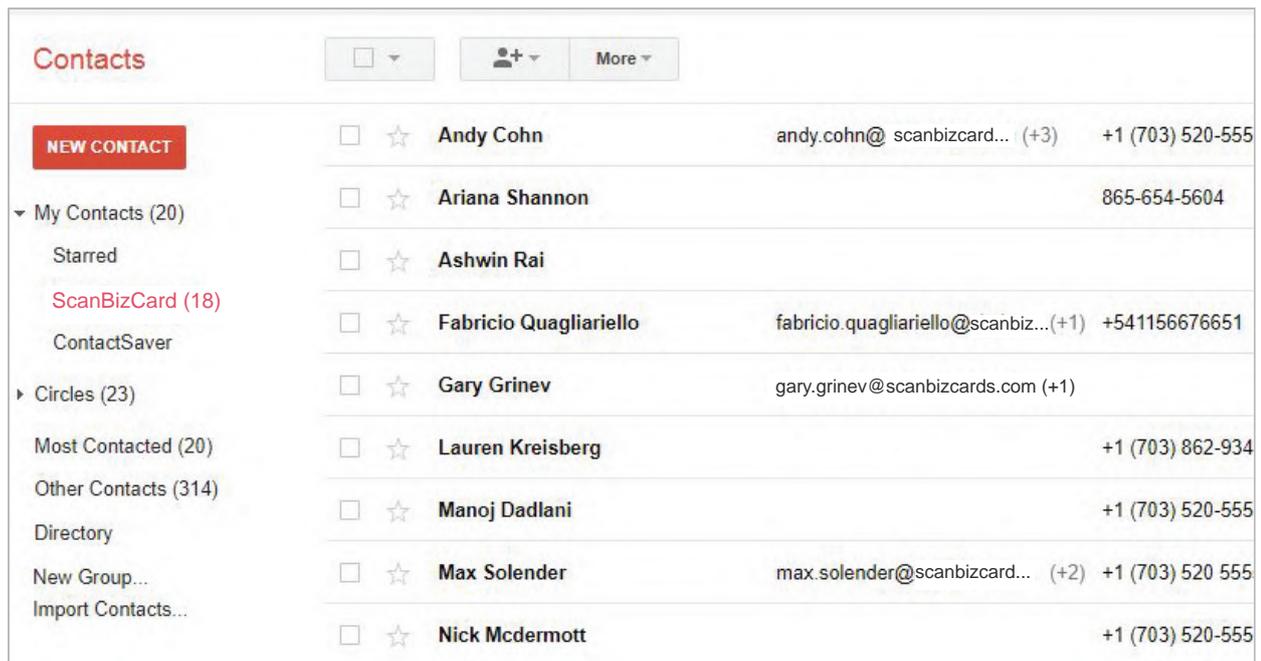

- The processing of each card will occur one by one. Once the process is complete, a pop up will appear with the message - Export Complete.

Exported contacts will now be visible in your Email Source Account contact list, Salesforce Web, and in the Email Capture Folder in the ScanBizCards app.
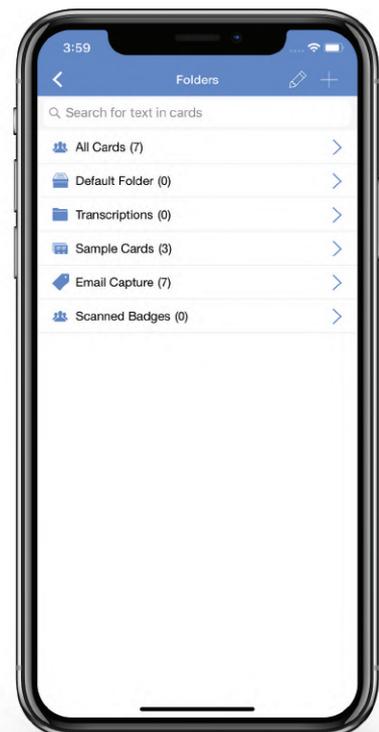
Email Source Account

1 You'll now be able to see the exported contacts in your Email Source Account.

Email Capture Folder

1 You'll also be able to see the exported contacts in your Email Capture Folder.

2 Once a contact/s is saved in the Email Capture Folder, you can then open the contact to get more options:

Move to Folder: You can move the contact/s to the folder of your choice
Copy to Folder: You can copy the contact/s to another folder
Delete Contact: You can delete the contact/s from this folder
Export to: You can export the contact/s to Salesforce, SugarCRM, Excel, Evernote, and Constant Contact.
Add to Address Book: You can add this contact to your native address book.
Merge: You can merge the contact with an existing contact in your address book.
Send Quick Intro mail: You can send your own contact information to that contact.
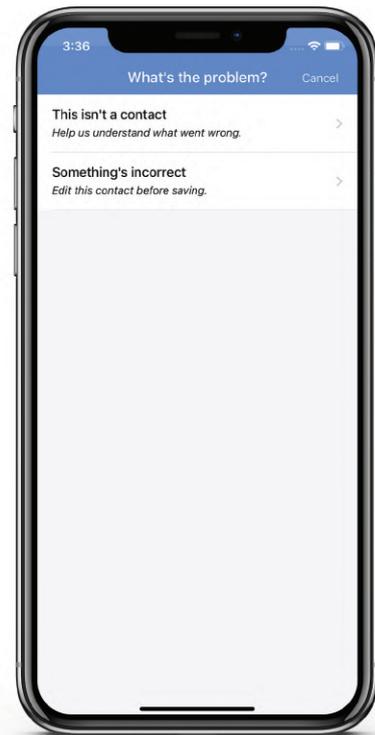Request Transcription: Not applicable for email signatures
3D Card View: Not applicable for email signatures

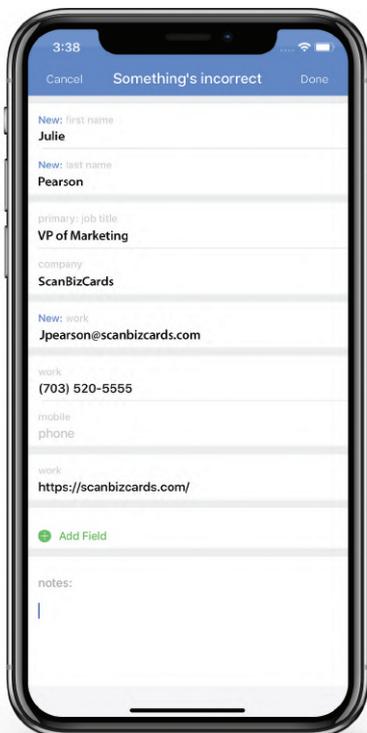## Edit Signature from Email Captures

1 If the captured email signatures are ncorrect or need to be modified, tap on the Problem tab located at the top right on the ESC details screen.
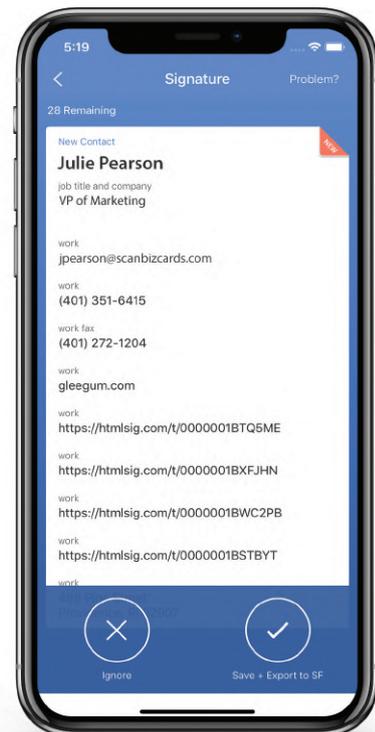
2 Tap on Something's incorrect to edit the signature details.

3 The signature detail screen will open. Now you can edit the signature detail. Once edited, click Save.

4 The export process will begin and the edited details will be exported to the Email Source Account, Salesforce web, and Email Capture folder.

5 If for any reason the export process is interrupted, you can export the signatures again from the Email Capture folder. To do so, follow the below steps:

- Open the Email Capture folder
- Tap on three dots located at the bottom left corner of the screen to initiate batch export (if you want to export multiple signatures) or a particular contact
- Tap on Export to
- Now tap on Salesforce
- The export process will begin

Technical Support

For any help, please reach out to our support team at:

enterprise@scanbizcards.zendesk.com