

Installing ScanBizCards Through AppExchange

Overview

ScanBizCards Enterprise: An Overview

ScanBizCards improves the productivity of sales and executive teams by allowing them to quickly snap photos of business cards using their phone and export contacts directly into Salesforce.

More than 82000 businesses use ScanBizCards to get new contacts into their sales funnel faster, boosting sales productivity by at least 40%.

Here's what you can do with ScanBizCards Enterprise edition:

- Attach contacts to new or existing customer accounts
- Assign lead owners before exporting to Salesforce
- Customize any field
- Capture additional contacts from email signatures, and much more

This guide will help you set up your ScanBizCards managed package. Follow the step-by-step procedure to get started.

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Section A Installing ScanBizCards Through AppExchange

Signing-up

Signing up from the website

Go to https://www.scanbizcards.com/ and click on the Free 14-Day Trial link.



2 You will land up on the Salesforce Appexchange page for ScanBizCards: Conference Badge & Business Card Scanner App for Salesforce: https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4XwXEAV



3 Click on Get it Now tab.



A pop-up will appear.

| | To continue, log in with your Salesforce credentials. |
|------------------------|--|
| By submit and the p | ting this request, you agree to share your information with Salesforce rovider of this listing, ScanBizCards, LLC |
| .lsting: Sc | anBlzCards Enterprise: Business Card Scanner App for Salesforce |
| | Don't have a Salesforce account? |
| | Continue as Guest |

5 If you're an existing Salesforce user, log-in with your credentials. If you're new, Continue as Guest. Sign up for your Salesforce account and login.

| To install this package, you need a Salesforce account Sign up for a free trial of Salesforce and we'll email you login credent When you're ready, come back to AppExchange and install the packa in the free trial. |
|---|
| Sign up for a free trial of Salesforce and we'll email you login credenti When you're ready, come back to AppExchange and install the packa in the free trial. Start Free Trial |
| |
| |

6 You can now proceed to install the package

Installing ScanBizCards Managed Package

Choose an environment



Choose an environment (i.e. Production or Sandbox) where you would like to install your ScanBizCards package.

[We recommend you to first install the package in your sandbox, and use it for few days before you're ready to install the package in your production environment]

| Where do you want to install this package? |
|---|
| Before you install in a production org, we suggest testing in a sandbox. |
| Install in a Production Environment Install where you or your users work, including developer orgs. Install in Production |
| Install in a Sandbox Test in a copy of a production org. Install in Sandbox |
| Cancel |

2 You will see the Confirm Installation Details page.

| Review the customization guide for installation and cor | inguration steps. |
|---|-----------------------|
| The new title <u>contermination register</u> for in blandhort and con | uðannau arbar |
| Package | Version |
| icanBizCards Enterprise (August 2019 / 1.47.0) | August 2019 / 1.47.0 |
| ubscription | Organization |
| ree Trial | ScanBizCards |
| Duration | Number of Subscribers |
| 4 Days | 5 Subscribers |
| Jsername | |
| nike@scanbizcards.com | |
| | |
| | |

3 Click on 'Confirm and Install'

You will see your Salesforce Login prompt. Proceed with the login using your Salesforce login credentials.

The next step is to choose the option you'd like to choose for installing your ScanBizCards Enterprise package.

| Install S Card Scar By ScanBiz Mo | canBizCards: Conner App for Sa | onference E lesforce | Badge & Business |
|---|---|--|---|
| - Share | Installing and granti | ing access to ad | Imins Only |
| App Name | Publisher | Version Name | Version Number |
| ScanBizCards: Conference Badge & Business Card Scanner App for Salesforce | ScanBiz Mobile Solutions LLC | August 2019 | 1.47 |
| Description | | | |
| Capture more B2B leads at e contacts directly into Salesfo transcription functionalities. | events with ScanBizCards. Snap prce.82,000+ businesses use the | photos of conference k ScanBizCards event b | badges & business cards & export adge and business card reader & |
| Additional Details View | Components | | |

Please Note: USERS WILL STILL NEED TO DOWNLOAD THE MOBILE APP ONTO THEIR RESPECTIVE DEVICES.

Installation Options

1 There are three options:

- Install for Admin(s) Only-- Your SBCE Salesforce package will be installed only for users with Admin roles. We prefer that user select "Install for Admins only" Install for All Users-- -- Your SBCE Salesforce package will be installed for all the users
- within the organization.
 Install for Specific profiles-- Your SBCE Salesforce package will be installed only for specific
- user profiles.

2 Click Install

| Install ScanBizCards: Conference Badge & Busines Card Scanner App for Salesforce By ScanBiz Mobile Solutions LLC | | | | | | |
|--|------------------------------|--------------|----------------|--|--|--|
| i Installation | Complete! | | | | | |
| | | | Done | | | |
| App Name | Publisher | Version Name | Version Number | | | |
| ScanBizCards: Conference Badge & Business Card Scanner App for Salesforce | ScanBiz Mobile Solutions LLC | August 2019 | 1.47 | | | |

2 Click Done

| Installed Pa | ackages | | | | | | | | | | | | | |
|---|--|--|---|---|---|--|--|-------------------------------|--|-------------|---------------------|----------------------|-------------------------|---|
| nstalled Packag | jes | | | | | | | | | | | | | Help for this Page |
| n AppExchange you can brow | - se, test drive, download, and install pre-buil | t apps and componen | s right into your sale | esforce.com environme | ent. Learn I | Vore about Installing R | Packages. | | | | | | _ | |
| pps and components are instal dividually using the other feat. | led in packages. Any custom apps, tabs, ar res in setup or as a group by clicking Deplo | nd custom objects are ly. | initially marked as "I | in Development" and a | ire not dep | loyed to your users. T | his allows you to te | st and customize be | fore deploying. You can | deploy the | compone | ants | 4 | esforce appexchan |
| epending on the links next to a | n installed package, you can take different | actions from this page | | | | | | | | | | | | /icit AppEychange v |
| o remove a package, click Univ | nstall. To manage your package licenses, o | lick Manage License | | | | | | | | | | | | risk uppexentinges |
| installed Packages | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | |
| Action | Package Name | Publisher | Version Number | Namespace Prefix | Statue | Allowed Licenses | Used Licenses | Expiration Date | Install Date | Limite | Арре | Taba | Objects | AppExchange Ready |
| Action Uninstall | Package Name Salesforce.com CRM Dashboards | Publisher salesforce.com | Version Number | Namespace Prefix | Statue N/A | Allowed Licenses | Used Licenses N/A | Expiration Date N/A | Install Date 4/2/2019 3:30 AM | Limits ✓ | Appe 0 | Taba 0 | Objects 0 | AppExchange Ready Not Applicable |
| Action Uninstall | Package Name Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards | Publisher salesforce.com | Version Number | Namespace Prefix | Status N/A | Allowed Licenses | Used Licenses N/A | Expiration Date | Inetall Date 4/2/2019 3:30 AM | Limits ✓ | Appe 0 | Tabe O | Objects 0 | AppExchange Ready Not Applicable |
| Action Uninstall | Package Name Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards Salesforce.and Chatter Apps | Publisher salesforce.com Salesforce.com | Version Number 1.0 1.18 | Namespace Prefix sf_chttr_apps | Statue N/A Free | Allowed Licenses N/A | Used Licenses N/A N/A | Expiration Date N/A | Install Date 4/2/2019 3:30 AM 4/4/2019 1:57 AM | Limite ✓ | Арря 0 0 | Tabe 0 0 | Objecta 0 0 | AppExchange Ready Not Applicable Passed |
| Action Uninstall Uninstall | Package Name Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards Salesforce.com CRM Dashboards Salesforce.com CRM Dashboards This package contains Connected Ap This package contains Connected Ap | Publisher salesforce.com Salesforce.com plications for the offici | 1.0 1.18 ally supported Sales | Namespace Prefix sf_chitr_apps force apps for IOS and | Statue N/A Free | Allowed Licensee N/A N/A nd Chatter application | N/A N/A ns on your desktop. | N/A N/A | Install Date 4/2/2019 3:30 AM 4/4/2019 1:57 AM | Limite ✓ | Appe 0 0 | Tabe 0 0 | Objects 0 0 | AppExchange Ready Not Applicable Passed |
| Action Uninstall Uninstall Uninstall Manage Licenses | Package Name Salesforce.com CRM Dashboards Description Salesforce.com CRM Dashboards Salesforce.and Chatter Apos Description This package contains Connected Ap AssanBaCards Enterprise | Publisher salesforce.com Salesforce.com plications for the offici ScanBiz Mobile | Verelon Number 1.0 1.18 ally supported Sales 1.47 | Namespace Pretix sf_chttr_apps force apps for IOS and scanbizcards | Statue N/A Free Android a Trial | Allowed Licenses N/A N/A nd Chatter application 8 | N/A N/A N/A ns on your desktop. | N/A N/A N/A 823/2019 | Install Date 4(2/2019 3:30 AM 4(4)/2019 1:57 AM 5(14/2019 7:53 AM | | Apps 0 0 2 | Tabs 0 0 11 | Objects 0 0 11 | AppExchange Ready Not Applicable Passed Passed |

Congratulations! Your ScanBizCards Package is now installed.

To Manage your Free/Paid licenses. Please click on 'Manage Licenses'

Prerequisites to install Managed Package

Please follow the steps below if you are installing ScanBizCards Enterprise Managed Package in your Salesforce organization on the Lightning platform.

Make sure that the domain for your Salesforce organization is registered. If not, follow the given steps:

- 1 Go to Set up
- 2 Search for 'My Domain' in Quick Setup
- 3 View 'My Domain' screen.

| My Domain Heip for the Page 🥹 |
|---|
| My Domain Step 1 |
| Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require d. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree Step 1 Choose Domain Name Choose Domain Name Choose Domain Pending Domain Pending Domain Deployed Testing Domain |
| Choose Your Domain Name |
| Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. |
| Your domain name can be up to 34 characters. It can include letters, numbers, and hyphens, buil it can't start or end with a hyphen. |
| https:// my.salesforce.com/ |
| Check Availability |
| Register Domain After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. |
| |

4 Now, choose a domain name.



Check availability of domain.

| My Domain Step 1 Shorcase your company's brand and keep your data more secure by adding a custom domain name to your Salestorce UFL. Because having a custom domain is more secure, some Salestorce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stateholders can agree on the secure source of the secure features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stateholders can agree on the secure source of the secure features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stateholders can agree on the secure source of the secure for the secure features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stateholders can agree on the secure source of the secure for the secure features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stateholders can agree on the secure source of the secure for the secure features requires it. The secure features requires it is up to a change your domain name once it's registered. Choose Your Domain Name It's a domain name and check whether if's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. Your domain name and check whether if's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's register. Ngu/(Edomain mark and check whether if's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's register. Ngu/(Edomain mark and check whether if's available. Be sure of your name before registering. Only Salesforce Customer Support can adveck whether if's avail | My Domain Help for this Page 🛛 |
|--|--|
| borcase your company's band and keep your dala more secure by adding a custom domain ame to your Salestore URL. Because having a custom domain is more secure, some Salestore features require it. It is neary to set you My Domain—the havinest part is choosing a name that your stakeholdees can agree Step 1 Choose Domain Name Choose Domain Name Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step 10 Binders Armonic Step | My Domain Step 1 |
| Step 1 Choose Domain Name Choose juit of the set of the set of your name before registering. Only Salesforce Customer Support can change your domain name once if's registered. Your domain name and doed whether if's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once if's registered. Your domain name and be up to 34 characters. It can include latters, numbers, and hyphens; but it can't start or end with a hyphen. https:/[edomain | Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL. Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain-the hardest part is choosing a name that your stakeholders can agree on. |
| Choose Your Domain Name Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. Your domain name can be up to 34 characters. It can include latters, numbers, and hyphens, but it can't start or end with a hyphen. https://tedomain my salesforce.com/ Check Availability @ Availabile Register Domain After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. | Step 1 Choose Domain Name Choose Domain Name Domain Registration Pending Domain Restring Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Domain Choose Choo |
| Enter a domain name and bedk whether i's svallable. Be sure of your name before registering. Only Satesforce Customer Support can change your domain name once if's registered. Your domain name can be up to 34 characters. It can include letters, numbers, and hyphens; but it can't start or end with a hyphen. https://edomainmy satesforce com/ Check Availability @ Availabile Register Domain After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. | Choose Your Domain Name |
| Tour domain name Can be up to 34 characters. It can include states, numbers, and mypnents, point can't start or end with a hypnen. https://tedomain my_salesforce.com/ Check Availability After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. | Enter a domain name and check whether it's available. Be sure of your name before registering. Only Salesforce Customer Support can change your domain name once it's registered. |
| Imp Affer you click Register Domain. Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. | Tour ownan name can be up to se characters in can include inters, numbers, and systems, dui in can i start or mix winn a rypinen. |
| Check Availability 🖉 Availabile Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. | mps //ecomain mysaestore com |
| Register Domain) After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when its done. | Check Availability 🖉 Availabile |
| | Register Domain) After you click Register Domain, Salesforce takes a few minutes to update its naming registries. You receive an email when it's done. |
| | |
| | |
| | |
| | |



It will take a few mins to register your domain. Salesforce will notify you by email once the new domain is ready.

7 Now, go back to the 'My Domain' screen.

8 Click on Login.

| My Domain Hep for the Page 🔮 |
|---|
| My Domain Step 3 |
| Showcase your company's brand and keep your data more secure by adding a custom domain name to your Salesforce URL Because having a custom domain is more secure, some Salesforce features require it. It's easy to set up My Domain—the hardest part is choosing a name that your stakeholders can agree on. |
| Your domain name is tedomain.mysalesforce.com |
| Your domain name is ready. Log in to test if out. Log in To test your new domain, click tabs and links. If you've customized the UI, check for hard links to your original URL. |
| Log in with your domain URL to deploy your domain. |
| Deploy to Users Roll out the new domain to your org. 1 |

9 Now, deploy domain for all users.



My Domain

Help for this Page 🔞



Creating Profiles

1

How to Create a User Profile

Let's go to the ScanBizCards Managed package. For this, go to the tabs section in Salesforce environment and click on nine dots icon to view all options.

| AI I | Q Search Salesforce | 😥 🖬 ? 🌣 🐥 👼 |
|--|---|------------------------------------|
| Sales Home Accounts V Contacts V Leads V Opportunities V Tasks V | Calendar 🗸 List Emails 🗸 Dashboards 🗸 Groups 🗸 Notes 🗸 Files 🗸 Quotes 🗸 | |
| Quarterly Performance | As of Sep 19, 2018 12:29:46 AM C Assistant | |
| CLOSED \$130,000 OPEN(570%) \$119,500 GOAL \$250,000 A | > Copportunity has Acme - 1,200 Widg | verdue tasks x |
| 2006 | > 📴 30 days without a Acme - 140 Widge | ny activity Is (Sample) |
| 2006 | > 📴 30 days without a salesforce com - 3: | ny activity 🖆 🛍 🗙 |
| 1504 | > 📴 30 days without a Global Media - 200 | ny activity) Widgets (Sample) |
| 100× | > 🔛 30 days without a Global Media - 180 | ny activity Widgets (Sample) |
| 50r | > 🔛 30 days without salesforce com - 2: | ny activity (0 Widgets (Sample) |
| Jul Aug Closed Closed Goal Closed | Open (570%) Sep Sep Joen (570%) Sep | ny activity |

A list of all tabs will appear.

| App Laund | cher | | Q Find an app or item | | | | Visit AppExchange |
|-----------|--|----------|--|---|---|----------|--|
| All Apps | | | | | | | |
| | Sales Sell smarter and faster with the world's #1 CRM solution. | | Sales Console (Lightning Experience) Lets sales reps work with multiple records on More | = | Relationship Management Build stronger customer relationships, manage renewals, and stay organized. | - | Lead Generation Generate leads faster, and qualify and nurture prospects using best practices. |
| | Sales Operations Customize and automate the sales process, and analyze your data to m More | iÿi = | Sales Leadership Monitor sales activity, and guide your team to help them meet and ex More | 5 | Lightning Usage App View Adoption and Usage Metrics for Lightning Experience | (| Bolt Solutions Discover and manage business solutions designed for your industry. |
| Sc | ScanBizCards ScanBizCards App | | | | | | |

2 Click on the 'ScanBizCards' option. The ScanBizCards package page will load. The Settings page for the Managed package will open.

| ScanBizCards | ScanBlzCards | | All ¥ Q. Sean | ch Salesforce | | | ** | ? 🌣 🖡 👼 |
|--------------------|-------------------------|--------|------------------|---------------|---------------|------------------------|------------------|------------|
| ScanBizCar | ds Enterprise | | | | | | Help - | Contact Us |
| PACKAGE NAME | | STATUS | ALLOWED LICENSES | | USED LICENSES | EXPIRATION DATE | | |
| ScanBizCards Ente | erprise | Trial | 5 | | 1 | June 11, 2019 | | |
| ROLES & PERMISSION | 48 MANAGE LICENSES REPO | DRTS | | | | | | |
| 🛂 SBC Ro | oles & Permission | าร | | | | | Load Record Type | Add |
| | SBC Role + | | Туре | Users | | Actions | | |
| в | Default | | Users | 1 | | Assign Edit Delete | | |
| 8 | demo 1 | | Users | 0 | | Assign Edit Delete | | |

This page shows the list of all profiles that the Admin user has created.

By default, the 'Default' profile is displayed. If an admin user wants to add a new profile for select users, admin user can click on 'Add'.

| ScanBizCards Enterprise Hep # Automits Licenses Licenses Exertisations over ScanBizCards Enterprise Trial 5 1 June 11, 2019 | ScanBizCards ScanBizCards | | All 💌 Q. Sean | ch Salesforce | | | ** = : | , 🌣 🛊 🖗 |
|---|---------------------------|------------|------------------|---------------|---------------|--------------------|------------------|------------|
| PACKAGE NAME ETXTUS ALLOWED LICENSES UNRED LICENSES EXPRANTION ENT SandBitCards Enterprise Trial 5 1 June 11, 2019 BOLISE & PERMISSIONS MANUAE LICENSES REPORTS International Enterprise International Enterprise SBC Roles & Permissions MANUAE LICENSES REPORTS International Enterprise Anno 11, 2019 SBC Roles & Permissions MANUAE LICENSES REPORTS International Enterprise Anno 11, 2019 SBC Roles & Definit Uners Anno 11, 2019 Anno 11, 2019 Anno 11, 2019 | ScanBizCards Enterprise | | | | | | Help 🔻 | Contact Us |
| ScardBicCards Enterprise Trial S 1 June 11, 2019 ROLES & FEAMURSTON SIGES & Permissions MANAGE LUCHVES REPORTS SBC Roles & Permissions Table Land Biccole Stype Automatic Stype SBC Roles & Default Users Actions 1 Default Users 2 Appl 1681 During 1 Default Default Default Automatic Default | PACKAGE NAME | STATUS | ALLOWED LICENSES | | USED LICENSES | EXPIRATION DATE | | |
| Roles & Permissions MANAGE LICENSES Confidenced Type Actions SBC Roles & Permissions Type Users Actions Sec Role- Type Users Actions Model Role Roles Users Actions | ScanBizCards Enterprise | Trial | 5 | | 1 | June 11, 2019 | | |
| SEC Exist- Type Users Actions 25 Default Users 1 Assign (SE) Default 25 Default Users 1 Assign (SE) Default | SBC Roles & Permission | orts NS | | | | | Load Record Type | Add |
| B Default Users 1 Andge 116t1 Delete Ib Amage 1 Image 1 Amage 106t1 Delete | SBC Role + | | Type | Users | Actic | ons | | |
| 18 descrit lives A below PAU Relation | Default | | Users | 1 | Assig | gn Edit Delete | | |
| B damb 1 Osen O Adagn Edit Dente | demo 1 | | Users | 0 | Assig | n Edit Delete | | |

5 When user adds a new profile then a pop-up will be displayed informing that ScanBizCards has enabled some default settings for the user to allow changes in these settings. The user can also set everything back to default using the 'Restore to defaults' tab.

| ScanBizCards Ente | rprise | | | | | | | Help 🔻 | Contact Us |
|--|---------|---|--|------------------|--|------|-------------------|--------|------------|
| PACKAGE NAME | | | STATUS | ALLOWED LICENSES | USED LICENSES | EXPI | RATION DATE | | |
| ScanBizCards Enterprise | | | Trial | 5 | 1 | June | 11, 2019 | | |
| ROLES & PERMISSIONS MANAGE LICENSES REPORTS SBC Roles & Permissions Enter profile name Ig General Settings | | ScanBizCards has you, pleas If you need to, y | CanBizCards has enabled some default settings for you, please feel free to change them. | | une (name (monant)) all of these settings base been best to active const | | | | |
| General Settings | ~ | Ontion | | default by tapp | Ing "Restore to Defaults" In the next screen | | User Can Modify 0 | | |
| General Settings | | | | - | | | | | |
| D losd | ~ | Export as | | | Okay | * | ø | | |
| Leau | <u></u> | Use 2 letter country code |) | | | | o | | |
| Contact | > | Use 2 letter state code | | | | | 0 | | |
| C Account | > | Attach Image to export 0 | | | | | 0 | | |
| Org Data Assignment | > | Export after scan | | 0 | | | 0 | | |

6 A blank profile page will appear. Enter your profile name.

| Enter profile name |
|--------------------|
|--------------------|

7 At this point, if users want to change any settings, they can. After this, they can click on the Publish button.

The user profiles are now saved.

Managing Settings

General Settings

1

General settings covers basic settings available in the app with yes/no options.



| Option | Value | User Can modify * | Description |
|---------------------------|------------------|----------------------|---|
| Export as | Lead/ Contact | YES / NO | Whether scanned data exports as a Lead Or Contact. |
| Use 2 letter country code | YES / NO | YES / NO | For any addresses detected on the card, |
| Use 2 letter state code | YES / NO | YES / NO | attempt to export using a 2 letter state code instead of full state name. If you have State & Country picklists enabled, turn this setting off. |
| Attach image to export | YES / NO | YES / NO | Whether to attach the image of the busi- ness card to the Contact or Lead record that is created. |
| Export after scan | YES / NO | YES / NO | When enabled, the default action shown to users after scanning is Export to Salesforce, rather than Add to Address Book. |
| Prompt to export later | YES / NO | YES / NO | Whether the user should be prompted if they want to export immediately or export later (for situations where they do not have connec- tivity, for example). |

| Duplicate Criteria | First Name Last Name Company Email Phone | | Set criteria on which you want duplicates to be detected while exporting to Sales- Force. |
|--|--|----------|--|
| Update duplicates | YES / NO | YES / NO | If a duplicate record is detected should the scanned data be added to the existing Contact or Lead? |
| Allow duplicate search across objects | YES / NO | | Whether the user can search only the current exported object type or across all. |
| Opt in to Smart OCR | YES / NO | | Smart OCR improves user experience by automatically making corrections to your scan using recent scans of the card generated by our user base. By participating in Smart OCR, accuracy as well as account name association are greatly improved. |
| Hide 'Store as default' | YES / NO | | Whether the option is shown during an export to save the data the user enters for custom fields as the default value (within the app only) for that field. |
| User can modify campaigns | YES / NO | | Whether the user is able to override the Campaign settings. |
| User can modify lead owners | YES / NO | | Whether the user is able to override the Lead Owner settings specified below. |
| BCC to Salesforce | YES / NO | | Whether the user auto populates their BCC to Salesforce email when using Quick Intro Email within the app. |
| Use Assignment Rule | YES / NO | | When enabled, the application will then follow the assignment rules during the creation of the new record. |
| Prompt For Lead/Contact Selection | YES / NO | | Whether the user is able to choose between Lead/Contact or not during an export. |

| Add Notes to Lead/Contact | YES / NO | YES / NO | When enabled, Notes will be create under exported Lead/Contact |
|---------------------------|----------|----------|--|
| Add Task to Lead/Contact | YES / NO | YES / NO | When enabled, Task/Activity will be create under exported Lead/Contact |

*User can modify: Specifies whether the user can override this property within the app.

Lead



| Lead Settings Lead Settings covers basic settings available for Leads. | |
|---|-------|
| Option | Value |
| User can modify Lead fields 0 | 0 |

- 2 Choose if app user can or cannot modify standard or custom fields while exporting.
- 3 If you allow the user to modify fields, the app user can modify lead standard or custom fields during export.
- 4 Standard fields are default fields supplied by Salesforce for each lead.

| Lead Standard Fields Lead Standard Fields supplied by Salesforce for each Lead. Few settings are automatically set by ScanBizCards, for these fields we will auto populate data after scanning business card without any manual user input. | | | | | |
|---|------------------------|-----------------------------------|----------------------|-------------------|---|
| Field | Map from scanned field | Default 0 | Include while export | Visible on mobile | |
| Salutation | | Automatically set by ScanBizCards | 0 | | * |
| First Name | | Automatically set by ScanBizCards | 0 | | |
| Last Name | | Automatically set by ScanBizCards | | | _ |
| Title | | Automatically set by ScanBizCards | | | |
| Company | | Automatically set by ScanBizCards | 0 | | _ |
| Industry | None | None 💌 | | | |
| Email | | Automatically set by ScanBizCards | 0 | | |
| Email Opt Out | None | | | | |
| Mobile Phone | | Automatically set by ScanBizCards | | | |
| Fax | | Automatically set by ScanBizCards | 0 | | |
| Fax Opt Out | None | | | | |
| Phone | | Automatically set by ScanBizCards | 0 | | |
| Do Not Call | None | | | | |
| Street | | Automatically set by ScanBizCards | 0 | | |

5 The Column Values display the following:

- Map from Scanned Field: Whether the app should attempt to automatically populate this field based on a specified scanned item.
- Default for Value: Specifies the default value for this field during the export.

- Include while export: Whether the field should be included in the export.
- Visible on mobile: Whether the user should be prompted to provide a value for this field during each export.

| Field | Map From Scanned Field | Default | Include while export | Visible on mobile |
|------------------|--|--------------------------------------|-------------------------|----------------------|
| Salutation | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| First Name | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Last Name | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Title | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Company | Not Applicable | | Default Included | NOT applicable |
| Industry | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Email | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Email Opt Out | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Mobile Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Fax | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Fax Opt Out | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Do Not Call | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Street | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |

6 List of Standard fields:

| City | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
|------------------------------|--|--------------------------------------|----------------------|----------------------|
| State/ Province | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Zip/Postal Code | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Country | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Website | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Employees | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Description | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Annual Revenue | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Rating | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Lead Source | List of all scanned fields to map with respective field. | | Default Included | Optional for user |
| Status | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Data.com Key | List of all scanned fields to map with respective field. | | Default Included | Optional for user |
| Clean Status | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Company D-U-N-S Server | List of all scanned fields to map with respective field. | | Default Included | Optional for user |
| D&B Company ID | List of all scanned fields to map with respective field. | | Default Included | Optional for user |
| Latitude | List of all scanned fields to map with respective field. | | Default Included | Optional for user |

| Longitude | List of all scanned fields to | Default | Optional for |
|-----------|-------------------------------|----------|--------------|
| | map with respective field. | Included | user |

7 The same section will appear for custom fields. Custom fields vary with the organizations.

8 Record Types

You'll find Record Types below the custom fields section. Record types will be visible ONLY if you have record types enabled. You'll be able to determine which record types to include, AND if one is set to default.

Contact



Click Contact- Contact settings will be displayed

| Contact Settings Contact Settings available for Contacts. | |
|--|-------|
| Option | Value |
| User can modify Contact fields • | 0 |
| Require Account for Contact | 0 |

2 There are two options available:

- User can modify contact fields: Choose if the app user can or cannot modify standard or custom fields when exporting cards.
- Require account for contact: Choose if the user needs an existing account when exporting cards or a new account can be created.
- 3 If you enable the user to modify standard or custom fields, the app user can modify contact standard or custom fields during export.
- 4 Standard fields are default fields supplied by Salesforce for each contact.

| Contact Standard Fields Contact Standard fields are the default fields supplied by Salesforce for the Contact object. Few settings are automatically set by ScanBizCards, for these fields we will auto populate data after scanning business card without any manual user input. Wherever you don't see this, you'll have to manually provide a value, or supply a default value if you want to include it in the export. | | | | | |
|---|------------------------|---|-----------------------------------|---|-------------------|
| Field | Map from scanned field | | Default 🛈 | Include while export ^① | Visible on mobile |
| Salutation | | | Automatically set by ScanBizCards | 0 | |
| First Name | | | Automatically set by ScanBizCards | Image: A start of the start of | |
| Last Name | | | Automatically set by ScanBizCards | 0 | |
| Title | | | Automatically set by ScanBizCards | 0 | |
| Department | | | Automatically set by ScanBizCards | 0 | |
| Email | | | Automatically set by ScanBizCards | 0 | |
| Email Opt Out | None | • | | | 0 |
| Mobile Phone | | | Automatically set by ScanBizCards | 0 | |
| Business Fax | | | Automatically set by ScanBizCards | © | |
| Fax Opt Out | None | • | | | |
| Business Phone | | | Automatically set by ScanBizCards | | |

- 5 The column values display the following:
 - Map from Scanned Field: Whether the app should attempt to automatically populate this field based on a specified scanned item.
 - Default: Specifies the default value for this field during the export. Include while export: Whether the field should be included in the export.
 - Visible on mobile: Whether the user should be prompted to provide a value for this field during each export.

6 List of Standard fields:

| Field | Map From Scanned Field | Default | Include while export | Visible on mobile |
|-------------------|--|--------------------------------------|----------------------|----------------------|
| Salutation | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| First Name | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Last Name | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Title | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Department | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Email | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Email Opt Out | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Mobile Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Business Fax | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Fax Opt Out | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Business Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Do Not Call | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |

| Mailing City | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
|-----------------------------|--|--------------------------------------|---------------------|---------------------|
| Mailing Country | Not Applicable | | | |
| Mailing Latitude | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Mailing Longitude | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Mailing Zip/ Postal Code | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Mailing State /Province | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Mailing Street | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Other City | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Other Country | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Other Latitude | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Other Longitude | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Other Zip/ Postal Code | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Other Street | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Other Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Home Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Assistant's Name | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |

| Asst. Phone | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
|------------------------|--|-----------------------------------|---------------------|---------------------|
| Contact Description | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Lead Source | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Birthdate | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Data.com Key | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |
| Clean Status | List of all scanned fields to map with respective field. | | Optional for use | Optional for use |

6 The same section will appear for custom fields. Custom fields vary with the organizations.

8 Record Types

Youll find Record Types below the custom fields section. Record types will be visible ONLY if you have record types enabled. You'll be able to determine which record types to include, AND if one is set to default.

Account

1 Click Account- Account Settings will be displayed



2 There are three options available:

- User can modify account types: Choose if the app user can or cannot modify standard or custom account fields when exporting.
- Allow person account: Choose if the app user will be able to create new account as a person account when exporting.

Note: Salesforce needs to enable person account for your organization.

3 If you allow the user to modify account types, the app user can modify account standard or custom fields during export.

4 Standard fields are default fields supplied by Salesforce for each contact

| Contact Standard Fields Contact Standard fields are the default fields supplied by Salesforce for the Contact object. Few settings are automatically set by ScanBizCards, for these fields we will auto populate data after scarning business card without any manual user input. Wherever you don't see this, you'll have to manually provide a value, or supply a default value if you want to include it in the export. | | | | | | |
|---|--------------------------|---|-----------------------------------|----------------------|-------------------|---|
| Field | Map from scanned field 🕚 | | Default 🖲 | Include while export | Visible on mobile | |
| Salutation | | | Automatically set by ScanBizCards | 0 | | |
| First Name | | | Automatically set by ScanBizCards | 0 | | |
| Last Name | | | Automatically set by ScanBizCards | 0 | | |
| Title | | | Automatically set by ScanBizCards | 0 | | |
| Department | | | Automatically set by ScanBizCards | 0 | | |
| Email | | | Automatically set by ScanBizCards | 0 | | |
| Email Opt Out | None | • | | | | |
| Mobile Phone | | | Automatically set by ScanBizCards | 0 | | |
| Business Fax | | | Automatically set by ScanBizCards | 0 | | |
| Fax Opt Out | None | • | | | | |
| Business Phone | | | Automatically set by ScanBizCards | 0 | | |
| Do Not Call | None | • | | | | |
| Mailing City | | | Automatically set by ScanBizCards | 0 | | |
| Mailing Country | | | Automatically set by ScanBizCards | 0 | | |
| Mailing Latitude | - | | | | | - |

5 The column values display the following:

- Map from Scanned Field: Whether the app should attempt to automatically populate this field based on a specified scanned item.
- Default: Specifies the default value for this field during the export.
- Include while export: Whether the field should be included in the export.
- Visible on mobile: Whether the user should be prompted to provide a value for this field during each export.
- 6 List of Standard fields:

| Field | Map From Scanned Field | Default | Include while export | Visible on mobile |
|------------------------|--|-----------------------------------|-------------------------|----------------------|
| Account Name | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Account Number | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Annual Revenue | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Account Source | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Account Site | List of all scanned fields to map with respective field. | | Optional for user | NOT applicable |
| Account Description | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |

| Industry | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
|------------------------------|--|--------------------------------------|----------------------|----------------------|
| Ownership | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Employees | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Account Rating | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Account Type | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Account Phone | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Account Fax | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Shipping City | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Shipping Country | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Shipping Latitude | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Shipping Longitude | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Shipping Zip/ Postal Code | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Shipping State/Province | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Shipping Street | Not Applicable | Automatically set by ScanBizCards | Default Included | NOT applicable |
| Website | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| Data.com Key | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |
| SIC Code | List of all scanned fields to map with respective field. | | Optional for user | Optional for user |

| SIC Description | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
|-------------------------|--|----------------------|----------------------|
| Ticker Symbol | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Clean Status | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| D&B Company ID | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| D-U-N-S Number | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| First Name | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Last Name | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| NAICS Code | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| NAICS Description | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Parent Account ID | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Assistant | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Asst. Phone | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Birthdate | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Department | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Email | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Email Bounced Date | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Email Bounced Reason | List of all scanned fields to map with respective field. | Optional for user | Optional for user |

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| Home Phone | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
|-----------------------------|--|----------------------|----------------------|
| Lead Source | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing City | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing Country | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing Latitude | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing Longitude | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing Zip/ Postal Code | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing State/ Province | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mailing Street | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Mobile | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other City | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other Country | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other Latitude | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other Longitude | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other Phone | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other Zip/ Postal Code | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Other State/ Province | List of all scanned fields to map with respective field. | Optional for user | Optional for user |

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| Other Street | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
|--------------|--|----------------------|----------------------|
| Title | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Salutation | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Tradestyle | List of all scanned fields to map with respective field. | Optional for user | Optional for user |
| Year Started | List of all scanned fields to map with respective field. | Optional for user | Optional for user |

7 The same section will appear for Custom fields. Custom fields vary with the organizations.

8 Record Types

You'll find Record Types below the custom fields section. Record types will be visible ONLY if you have record types enabled. You'll be able to determine which record types to include, AND if one is set to default.

Org Data Assignment

Assign: Accounts:

- 1 Assign Accounts This section displays all Accounts available in your Salesforce instance. Account name and geographic location (if available) is displayed.
- 2 You will have the ability to turn off specific Accounts that you do not wish your users to be able to assign Contacts to during exports.
- 3 Now you can filter the Accounts on the basis of created Account Record types.

(Note: This has no effect on Lead exports — and this will NOT give users access to accounts that they would otherwise not have access to).

| Account Name 🔺 | Visible on mobile | | City/State | | |
|-------------------------------------|-------------------|---------------|---------------------|--|--|
| All V Q, Search | Fliter by | | Q Search | | |
| Burlington Textiles Corp of America | 0 | | Burlington/NC | | |
| Dickenson pic | 0 | | Lawrence/KS | | |
| Edge Communications | 0 | Austin/TX | | | |
| Express Logistics and Transport | 0 | Portland / OR | | | |
| ienePoInt | 0 | | Mountain View/CA | | |
| irand Hotels & Resorts Ltd | Chicago/IL | | Chicago/IL | | |
| yramld Construction Inc. | 0 | | Paris/ | | |
| Force | 0 | | San Francisco/CA | | |
| Inited Oll & Gas Corp. | 0 | | New York/NY | | |
| Jnited Oli & Gas, Singapore | 0 | | Singapore/Singapore | | |

Assign: Campaigns:



1 This section displays all the campaigns available in your salesforce instance.

It allows you to control to which campaigns, if any, end users will be able to assign to a Lead or Contact during an export.

Note: In addition to this functionality, you can customize "Description" text which displays alongside the campaign during an export."

3 Campaign Columns

- Default: Specifies whether exported Leads or Contacts are added to this Campaign automatically (will not be shown to the user as a choice during the export).
- Visible on mobile: Specifies whether the user can add exported Leads or Contacts to this Campaign during an export.
- Description: Specifies the text the user sees next to the checkbox to add the exported Lead or Contact to this Campaign.

Assign: Lead Owners:

This section allows you to control which Users or Queues, if any, the end user will be able to specify as the owner of the Lead record they are exporting. The columns in the section and their function are as follows:

Lead Owner Columns:

- Name : Name of the user or queue that CAN be assigned as the object owner
- Email : The email for the user that CAN be assigned the object
- Type : This identifies the row as either a specific User or a Queue
- Visible on mobile : By checking this box, the User or Queue is available to the app user during export to select as the owner of the Lead

| Assign: Lead Owners This section allows you to control which Users or Queues, if any, the end user will be able to specify as the Owner of the Lead during an export. | | | | | |
|--|----------|-----------|---|-------------------|---|
| Name 🔺 | Email | Туре | | Visible on mobile | |
| Q Search | Q Search | Filter by | • | Filter by | • |
| Danny Panzer | user | | | | |
| PQueue2 | | queue | | | |
| nternational Leads | queue | queue | | | |
| lanish Rupani | user | | | | |
| ichael Driscoll | user | | | | |
| ewQueue | | queue | | | |
| atrick Questembert | user | user | | | |
| om ronan | user | | | | |
| S Leads | | queue | | | |
| Items Per Page : 10 🛊 | | | | Page: 1 🛊 of 1 < | |

For Admins

Instructions for Admin Users

These instructions are solely for admin users of ScanBizCards Enterprise. Admin users can now access all major app functionality using a single window.

| Roles & Permissions Manage Licenses | Reports | | | |
|-------------------------------------|------------|----------------------|-----------------|--------------|
| 🔹 Assign & Manage | e Licenses | | Add Users | Remove Users |
| Name 🔺 | Role | Profile | Actions | |
| Mike Tyler | | System Administrator | Assign Remove | |

How to Manage Licenses

Assigning Roles and Licenses:

Click 'Manage Licenses'



| ScanBizCards Enterprise | | | | | | Help Contact |
|---|--------|----------------------|---------------|-----------------|-----------------|----------------|
| PACKAGE NAME | STATUS | ALLOWED LICENSES | USED LICENSES | EXPIRATION DATE | | |
| ScanBizCards Enterprise | Trial | 5 | 4 | June 11, 2019 | | |
| Roles & Permissions Manage Licenses Reports | | | | | | |
| 🕸 Assign & Manage Lic | censes | | | | Add Users | Remove Users |
| Name 🔺 🛛 🕅 | Role | Profile | | | Actions | |
| Mike Tyler | | System Administrator | | | Assign Remove | |
| Fabrice Gullaume | | System Administrator | | | Assign Remove | |
| Steve Jay | | Standard User | | | Assign Remove | |
| Tom Ronan | | Standard User | | | Assign Remove | |

2 Click 'Add Users' to get a list of available users. Select users you want to assign licenses to.

| Q. Search | | Q Search | |
|-------------------------------|-------------------------|----------|--|
| vallable Users | Selected User | s | |
| Fabrice Gullaume Steve Jay | Tom Ronar Mike Tyler | | |
| | | | |

3 Click Save.

| Q Search | | Q Search | |
|-----------|--|----------|--|
| steve Jay | Selected Users Tom Ronan Mike Tyler Fabrice Gullau | ime | |

4 The selected users will now be available on the 'Assign and Manage Licenses' page.

| ScanBizCards Enterprise | | | | | | Help 🔻 | Contact Us |
|---|--------|------------------|---------------|-----------------|-----------------|--------|------------|
| PACKAGE NAME | STATUS | ALLOWED LICENSES | USED LICENSES | EXPIRATION DATE | | | |
| ScanBizCards Enterprise | Trial | 5 | 4 | June 11, 2019 | | | |
| Roles & Permissions Manage Licenses Reports | enses | | | | Add Users | Remov | ve Users |
| Name 🔺 🛛 🕅 | tole | Drofile 💭 | | | Actions | | |
| Mike Tyler | | System Administ | trator | | Assign Remove | | |
| Peter Nikolson | | System Administ | rator | | Assign Remove | | |
| Steve Jay | | Standard Use | r | | Assign Remove | | |
| Tom Ronan | | Standard Use | r | | Assign Remove | | |

5 Click 'Assign' to assign ScanBizCards roles to individual users. The list of available ScanBizCards roles will be displayed.

| Available Roles | Q Search |
|-----------------|----------|
| O Profile 1 | |
| Profile 2 | |
| Default | |
| | |
| | |
| | |

- 6 Assign a ScanBizCards role to the user and click 'Save'
- 7 Go to 'SBC Roles & Permissions' tab. Click the number of users corresponding to the role you assigned to the user. The list of users under that role will be displayed.

| 💿 ScanBi | zCards Enterprise | | | | | | | | | Help 🔻 | Contact Us |
|-------------|--|----------------|------------------|---|-----------|-------------|------------------------|--------|----------|----------|------------|
| PACKAGE NAM | ME | STATUS | ALLOWED LICENSES | U | JSED LICE | NSES | EXPIRATION DA | TE | | | |
| ScanBizCard | ds Enterprise | Active | 8 | 4 | ¥. | | September 20 | , 2019 | | | |
| & Roles & P | ermissions ^e * Manage Licen | ses CReports C | | | | | | | Load Rec | ord Type | Add |
| | SBC Role + | | Туре | | Users | | Actions | | | | |
| 8 | Profile 1 | | Users | | 0 | | Assign Edit Delete | | | | |
| 8 | Profile 2 | | User Profiles | | 1 | | Assign Edit Delete | | | | |
| 8 | Default | | Users | | 1 | D Urors (1) | | | | | |
| | | | | | | Tony White | | | | | |

The role has been assigned successfully.

Revoking User Licenses:

1 Go to the Manage Licenses tab.

| p ▼ Contact Us |
|----------------|
| |
| |
| |
| |
| |
| Add |
| |
| |
| |
| |
| |
| |

2 For revoking individual licenses:

- Under the Actions title, click Remove corresponding to the individual's name.
- A pop up will be displayed.

| Ô |
|-------------------------------------|
| You're about to remove llcense for: |
| Steve Jay |
| Cancel Remove |

• Click Remove. The user license will be removed.

3 For revoking multiple user licenses

- Click Remove Users tab located on the top right of the screen.
- A list of licensed users will be displayed.

| ense | ed Users | Q, Search | |
|------|-------------------|-----------|--|
| | Fabrice Gullaumed | | |
| | Mike Tyler | | |
| 0 | Steve Jay | | |
| | Tom Ronan | | |
| | | | |
| | | | |
| | | | |
| | | | |

- Select users whose licenses need to be revoked.
- Click Remove and you're done.

Reports

Admin users can access three types of reports:

- Business Cards
- Email Signature Capture (if your organization has subscribed for the Signature Capture Package)
- User Activity

| Reports | TOTAL USERS : 2 AVERAGE SIGNATURE CAPTURED PER DAY; 2 | 06/01/2018 - 11/01/2018 🛗 |
|----------------|---|-----------------------------------|
| Reports | | |
| Business Cards | Signature Captured 🔵 SalesForce Exports | |
| Email Capture | | |
| Luser Activity | 200 | |
| Filters | 159 | |
| Add Users. | Q 100 | |
| | and a three the second | and tot . Tod and and and and and |

Business Cards:



- 2 At the top, the total number of users along with the average number of cards scanned per day during the selected time period will be displayed.
- 3 In addition, the report will also graphically display the number of business cards scanned versus the number of cards exported to Salesforce during the chosen time period.

| | 🔘 Scanned Cards 🔵 SalesFarce Exports |
|--------|--|
| 180- | |
| 160 | |
| 140- | |
| 120 | |
| 100- | |
| 83 | |
| 60 - | |
| 42 - | |
| 20 | |
| 2.2100 | I se |
| 2 Car | and have been also also also and also also also also also also also also |

4 Admin user can also choose to view the graph selectively for scanned cards orsalesforce exports by clicking on the other tab to cancel its view.

| Reports | |
|------------------|--|
| E Business Cards | O Beamed Gene StatiForce Exports |
| Email Capture | |
| Luser Activity | 100- |
| Filters | 80- |
| | 60 |
| Add UsersQ | 48 |
| | 28 |
| | |
| | Double Double and an address and and and address and address and address |
| | , , , , , , , , , , , , , , , , , , , |

5 Using filters, Admin user can also view the above statistics for each individual user.

Email Signature Capture:

1 The report will only be displayed if you have subscribed for the Email Signature Capture Package. Else, you'll see the following screen.

| TOTAL USERS : 0 AVERAGE SIGNATURE CAPTURED PER DAY: 0 | 05/16/2019 - 08/14/2019 🛗 |
|--|---------------------------|
| | |
| | |
| | |
| Sorry, there are No Signature Capture Reports to so Your License users have not linked any email accounts for Sig | how. nature Capture. |
| | |

- 2 If you have subscribed for the package:
 - Select a time period for the report. Click Apply.



- At the top, the total number of users along with the average number of email signatures captured per day during the selected time period will be displayed.
- In addition, the report will also graphically display the number of email signatures captured versus the number of email signatures exported to Salesforce during the chosen time period.

| Reports | TOTAL USERS : 2 AVERAGE SIGNATURE CAPTURED PER DAY: 2 | 06/01/2018-11/01/2018 🛗 |
|---|--|--------------------------------|
| Reports Business Cards Finali Capture | Signature Captured Sales/Force Exports | |
| User Activity | 150 | |
| Add UsersQ | 100 50 The share and the share | see ed tot and son and tot and |

- Admin user can also choose to view the graph selectively for signatures captured or salesforce exports by clicking on the other tab to cancel its view.
- Using filters, Admin user can also view the above statistics for each individual user.

User Activity:

Select a time period for the report. Click Apply.

| Reports | TOTAL U | SERS : | 2 | AVER | RAGE | PER | DAY | EXPO | ORTS | : 3 | | | | | | | | | | | | | | | | | | | | | | | 06 | /01/ | 2018 | -µ0/0 | 01/20 | 018 | 苗 | |
|-------------------|---------|--------|-----|---------|------|--------|-------|---------|---------|----------|-----|---------|------|---------|--------|-------|-------|---------|-------|-------|--------|-------|-----|--------|-----|-------|------|--------|-----|-----|-------|---------|--------|--------|--------|-------|-------|------|--------|------------|
| | | | | | | | | | | | | | | | | | | | | | | | | < | | | Jur | 2018 | 3 | | | | | | Jul 20 | 18 | | > | 1 | |
| Reports | | | | | | | | | | | | | | | | | | | | | | | | SI | 1 1 | lo 1 | ſu I | Ne | Th | Fr | Sa | Su | Mo | Tu | We | Th | Fr | Sa | 1 | |
| Rusinger Cards | | | | | | | | | | | | | | | | | | | | O Us | ers | | | 23 | 7 3 | 8 2 | 29 | 30 | 31 | 1 | 2 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | |
| La business carus | | 350 | | | | | | | | | | | | | | | | | | | | | | . 3 | | 4 | 5 | 6 | 7 | 8 | 9 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | |
| Email Capture | | 200 | | | | | | | | | | | | | | | | | | | | | | 1 | , | 8 | 19 | 20 | 21 | 22 | 23 | 15 | 16 | 17 | 18 | 12 | 20 | 21 | | |
| Luser Activity | | 300 | | | | | | | | | | | | | | | | | | | | | | 24 | | 5 2 | 26 | 27 | 28 | 29 | 30 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 3 | |
| | | 250 | | | | | | | | | | | | | | | | | | | | | | . 1 | | 2 | 3 | 4 | 5 | 6 | 7 | 29 | 30 | 31 | 1 | 2 | 3 | 4 | | |
| îlters | | 200 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 06/0 | 1/2018 | - 10/0 | 01/201 | | Cance | | Apph | | |
| Add Users | Q | 150 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | - | |
| | | 50 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | ÷ | | | | + | |
| | 71.14 | 0.0. | 330 | , 9 Jun | o in | 16 Jun | 7 110 | -23 Jur | - A JUP | 0-30 Jur | sr. | 1 241-7 | 7.10 | 8 Jul . | 14 110 | 15 34 | 21 11 | 72 Jul- | 28 14 | 79 54 | A PUIS | NUO-1 | RUG | AU9-18 | PUS | o Aug | 25 N | • • | AUD | Sep | 2.585 | . 8 50P | -54 | 155 | 2 | R-225 | 989 | SEP. | 29 54P | 10 5ep-600 |

- 2 At the top, the total number of users along with the average number of cards exported per day during the selected time period will be displayed.
- 3 The report will also graphically display the number of business cards exported by all users combined during the chosen time period.
- In addition, a table with following user details will be displayed for the selected time period. The table will display users in descending order based on total number of cards and signatures (combined) exported within the selected time period.
 - User Name
 - Cards exported
 - Captures exported
 - Total
 - Last logged in

| Name | Cards Exported | Captures Exported | Total | Last Logged In |
|-------------------|----------------|-------------------|-------|----------------|
| Fabrice Guillaume | 80 | 160 | 240 | 9 days ago |
| Steve Jay | 30 | 60 | 90 | 9 days ago |

5 Using filters, Admin user can also view the above statistics for each individual user.

Installation Options

Install for Admins Only

If you have chosen the installation option as "Install for Admins only ", then only admin user will be able to access ScanBizCards manage package when log in to Salesforce account through the web. Now you can assign ScanBizCards Enterprise license to your non-admin users.

The settings that the admin will choose for these users in the ScanBizCards managed package will be downloaded on their respective mobile devices whenever they log in. However, if these users log in to their Salesforce account through the web, they won't be able to access ScanBizCards manage package as it's only visible for admins.

Install for All Users

If you have chosen the installation option as "Install for All Users" then the ScanBizCards manage package will be installed for all users. You can assign ScanBizCards Enterprise license to the non-admin users.

The settings that the admin will choose for these users in the ScanBizCards managed package will be downloaded on their respective mobile devices whenever they log in. If these users log in to their Salesforce account through the web, they will be able to access ScanBizCards manage package as it's visible for all licensed users.

Section B Integrating ScanBizCards With the Salesforce 1 App

Overview

Salesforce Mobile Application Integration To ScanBizCards

Salesforce mobile application enables the building of applications in the Salesforce Customer Success Platform, in conjunction with the Lightning development platform. The combination also allows for third-party applications to be built on top of Salesforce apps for smartphones, tablets and wearables.

With Lightning, admins can create applications quickly and easily without having to code from scratch, because many items can draw on prebuilt Lightning Components. Salesforce mobile application also enables developers to use alternatives to Force.com, including the Heroku platform, through capabilities like Salesforce Connect, which make it easier to build customer-facing apps. Force.com has traditionally been used for creating internal employee-facing apps built on the Salesforce platform.

Open APIs also enable multiple applications built on different code bases to interact without conflict and share data. Salesforce involves the mobile app, which delivers the Salesforce platform as mobile apps, such as the Sales, Service, Community and Wave Analytics clouds. The Salesforce App Exchange also features third-party applications that have been built on top of the Salesforce platform.

Integration to ScanBizCards **Steps for integration** Once you have installed the SBC Enterprise managed package -Go to Setup in your SF org, then choose Feature Settings > Chatter > Chatter Settings Ensure that Chatter is enabled = Required Information Chatter Settings Turn on Chatter and Global Search features. We have given you a head start-your users may auto-follow a few people or records by default and your search box is in the header. Learn More ... Enable 1 Ensure that Publisher Actions are enabled 3 Actions in the Publisher Add actions you create to the publisher on the home page, Chatter tab, and record detail pages. With this setting enabled, you can also customize the order in which all actions appear, including Post, File, Link, and Poll. Enable Actions in the Publisher 4 Go to Setup > User Interface > Global Actions > Publisher Layouts Edit the Global Layout 5 Global Publisher Layouts New Publisher Layout Assignment Action Publisher Layout Name Created By Modified By Edit | Del Global Layout David Fowler, 9/26/2018 2:25 AM David Fowler, 9/26/2018 2:25 AM

- 6 You will see 2 seemingly identical Actions in the selection box on top, both called "Scan Business Card".
 - It is important to drag the correct one to the list of Publisher Actions below.
 - To find the correct one, hover your mouse over each of them, and choose the one that says "scanbizcards Global_SBC" (rather than "scanbizcardsAccount_SBC")

| Global Layout 🗸 | | | | | | Video Tutorial Help | for this Page 🔞 |
|------------------------|-----------------|-----------------------|-----------|-----------------|--------------------|---|-----------------|
| Save V Quick Save Cano | el 🔷 Undo 🛝 Red | o 📃 Layout Properties | | | | | |
| Quick Actions | Quick Find Mo | obile Action Name | | | | | |
| Mobile & Lightning | Email | Mobile 8mart Actions | New Event | New Opportunity | Question | | |
| Actions | File | New Account | New Group | New Task | Soan Business Card | 7 | |
| | Link | New Case | New Lead | Poll | Soan Business Card | 1 | |
| | Log a Call | New Contact | New Note | Post | | Label: Scan Business Card | 8 |
| | | | | | | Action Type: Quick Action Create Feed Item: No | |

7 Drag this action into the list of publisher actions in the position you prefer. There are 2 considerations to bear in mind when selecting a position:

New Contact

Log a Call

Salesforce Mobile and Lightning Experience Actions

Scan Business Card Post File New Event New Task

• You probably should not put it in the first position, since this is the action that will be open by default in the SFDC web interface when you open the Chatter tab

New Opportunity

New Case

Link

New Lead

Question

Poll

- This action is inapplicable to the web interface
- The Salesforce mobile application actions menu can only show 6 tiles at a time, so if you put this action later than the 6th position, you will have to scroll to the next screen before you see it within this menu.
- 8 Click the "Save" button located on top left

Using these steps, Scan Business Card action will be available from the Main Menu

[Please Note: Steps 9—13 are Optional]

Follow these steps only if you want the Scan Business Card action to also be available from the actions menu when looking at a particular account within Salesforce1: Assigning Licenses

- 9 Go to Setup > Customize > Accounts > Page Layouts
- 10 Edit the default layout
- 11 You will see a similar screen to what you saw earlier, but this time you have to choose the "Mobile & Lightning Actions" list from the left hand menu

| Account Layout - | | | | | Custom Console Co | omponents Mini Page Layo | ut Mini Console View | Video Tutorial | Help for | |
|-------------------------------|----------|-------|--------------------------|----------------|-------------------|--------------------------|----------------------|----------------------|--------------|-----|
| Save V Quick Save | Preview | As▼ (| Cancel 🛷 Undo 🐟 | Redo 🛛 🖪 Layou | t Properties | | | | | |
| Fields | <u>^</u> | Q Qui | ick Find Mobile Action N | lame 🛞 | | | | | | |
| Buttons | | only) | Include Offline | New Account | New Group | New Task | Question | Sharing | View Website | |
| Custom Links | | | Link | New Case | New Lead | Poll | Scan Business Card | Submit for Approval | | |
| Quick Actions | | | Log a Call | New Contact | New Note | Post | Scan Business Card | View Account Hier | | |
| Mobile & Lightning Actions | | ita | Mobile Smart Actions | New Event | New Opportunity | Printable View | Send Text | Label: Scan Business | Card | - 1 |
| Expanded Lookups | | | | | | | | | | |

12 This time, hover your mouse over the "Scan Business Card" actions and choose the one that shows "scanbizcards Account_SBC", and drag this to your desired position below in the list of Publisher Actions. The same position considerations as above apply.

- 13 Click the "Save" button on top
- 14 Now Navigate to: Setup > Develop > Visualforce Pages
- 15 Click "Security" to the left of SBC FeedLink and SBC AccountLink
- 16 Add profiles of those who will be using SBC to the list of enabled profiles.
- 17 Fire up the Salesforce1 app on your mobile device



ScanBizCards Interaction with Accounts Layout

If You Have Added Scan Business Card Action to the Accounts Layout

- 1 Open the main menu on the top left of the screen
- 2 Choose Accounts and then click into a particular account
- 3 Touch the Actions menu from the bottom right and verify that the Scan Business Card action is present.

If the action is not present, force quit and restart the app.

Help and Support

Technical Support

If you have any questions, please contact us. Email: enterprise@scanbizcards.zendesk.com