



ScanBizCards

Snap. Touch. Connect.

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

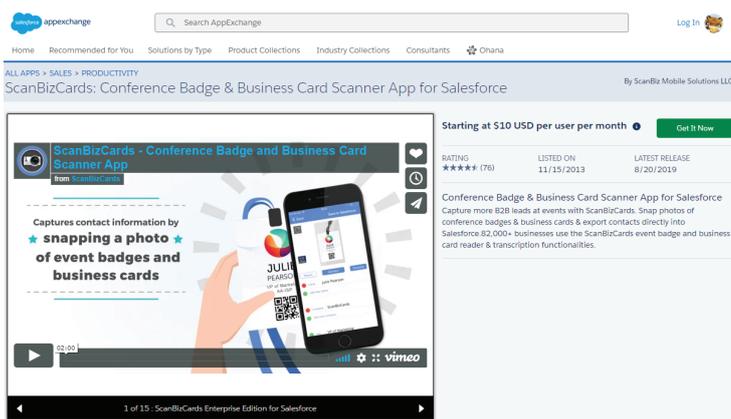
Signing-up

Signing up from the website

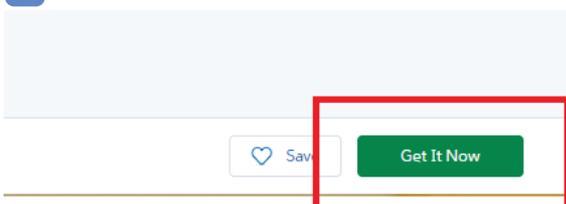
- 1 Go to <https://www.scanbizcards.com/> and click on the Free 14-Day Trial link.



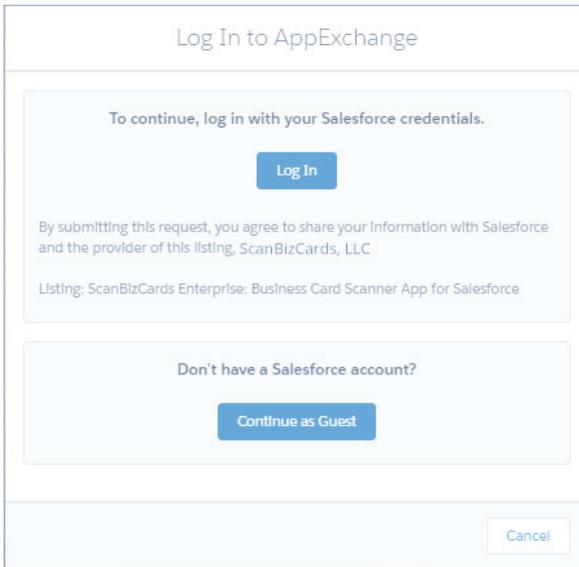
- 2 You will land up on the Salesforce AppExchange page for ScanBizCards: Conference Badge & Business Card Scanner App for Salesforce: <https://appexchange.salesforce.com/listingDetail?listingId=a0N300000B4XwXEAV>



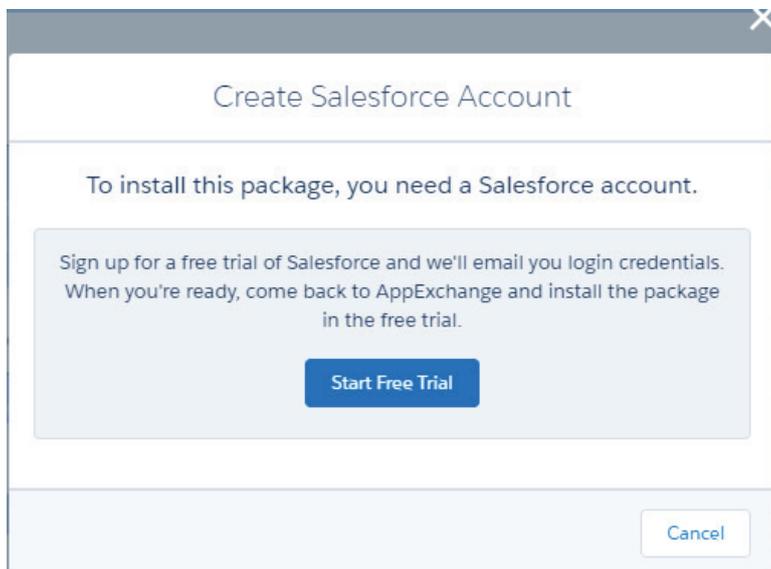
- 3 Click on Get it Now tab.



- 4 A pop-up will appear.



- 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.



- 6 You can now proceed to install the package

Installing ScanBizCards Managed Package

Choose an environment

- 1 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 a Sandbox
Test in a copy of a production org.

Buttons: **Install in Production**, **Install in Sandbox**, **Cancel**

- 2 You will see the Confirm Installation Details page.

Confirm Installation Details

i Review the [customization guide](#) for installation and configuration steps.

Package	Version
ScanBizCards Enterprise (August 2019 / 1.47.0)	August 2019 / 1.47.0
Subscription	Organization
Free Trial	ScanBizCards
Duration	Number of Subscribers
14 Days	5 Subscribers
Username	
mike@scanbizcards.com	

Buttons: **Cancel**, **Confirm and Install**

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.

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 events with ScanBizCards. Snap photos of conference badges & business cards & export contacts directly into Salesforce. 82,000+ businesses use the ScanBizCards event badge and business card reader & transcription functionalities.

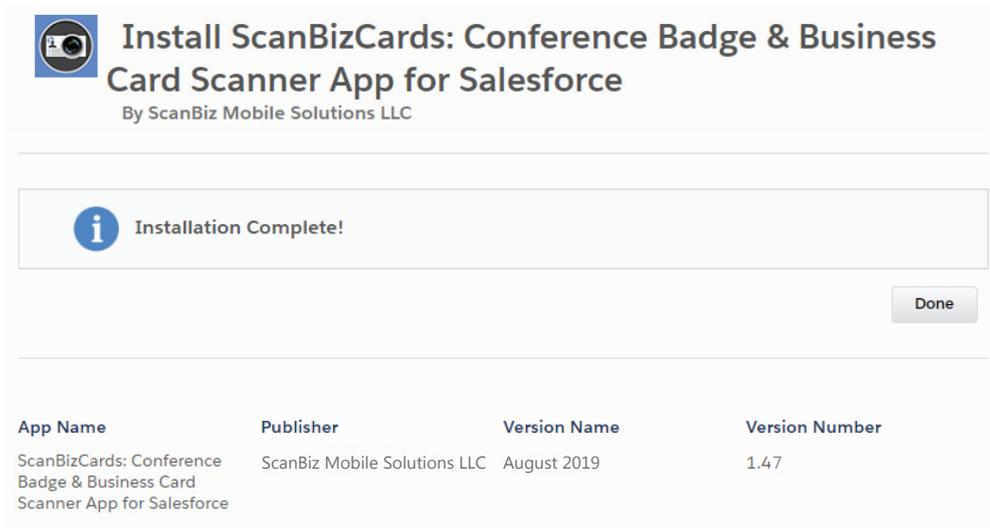
[Additional Details](#) [View Components](#)

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 & Business 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	1.4.7

2 Click Done



SETUP Installed Packages

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in Setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready	
Uninstall	Salesforce.com CRM Dashboards	salesforce.com	1.0		N/A	N/A	N/A	N/A	4/2/2019 3:30 AM		✓	0	0	0	Not Applicable
	Description: Salesforce.com CRM Dashboards														
Uninstall	Salesforce and Chatter Apps	Salesforce.com	1.18	sf_omni_apps	Free	N/A	N/A	N/A	4/4/2019 1:57 AM			0	0	0	Passed
	Description: This package contains Connected Applications for the officially supported Salesforce apps for iOS and Android and Chatter applications on your desktop...														
Uninstall / Manage Licenses	ScanBizCards Enterprise	ScanBiz Mobile	1.4.7	scanbizcards	Trial	5	1	8/28/2019	5/14/2019 7:53 AM			2	11	11	Passed

Uninstalled Packages

No uninstalled package data archives

Congratulations! Your ScanBizCards Package is now installed.

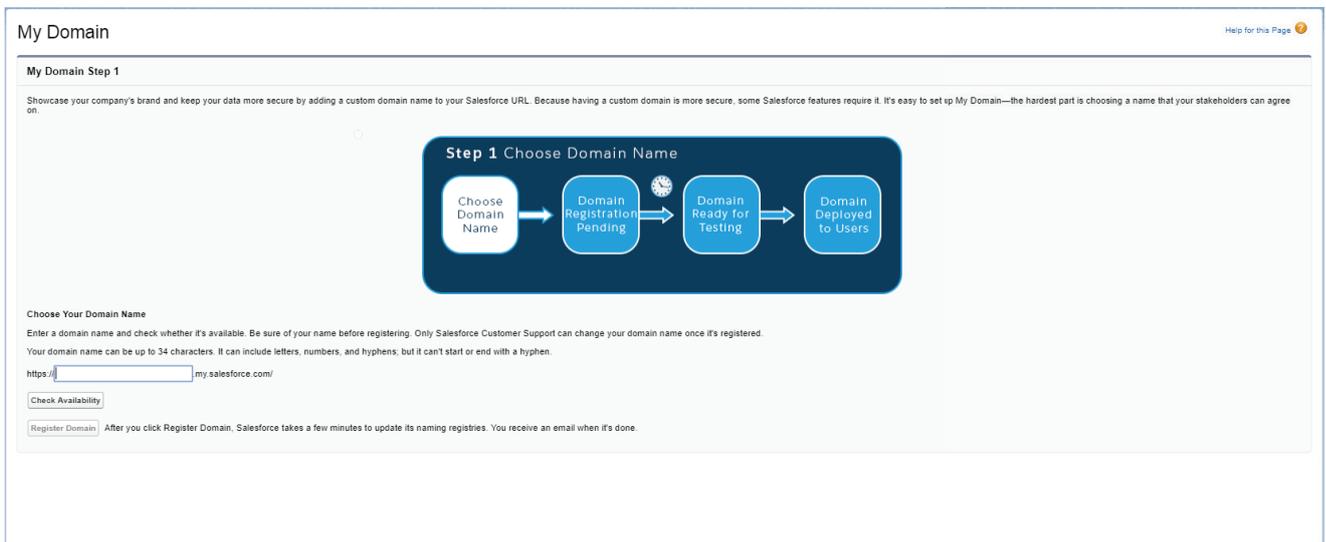
To Manage your Free/Paid licenses. Please click on 'Manage Licenses'

Prerequisites to install Managed Package

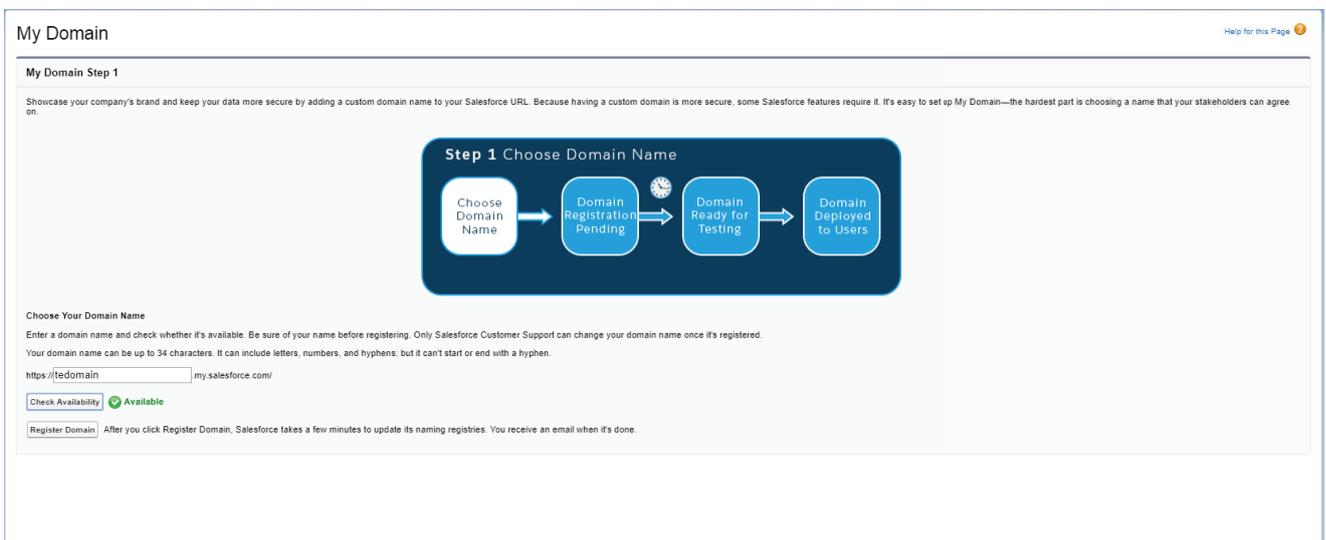
Please follow the steps below if you are installing ScanBizCards Enterprise Managed Package in your Salesforce organization on the Lightning platform.

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.



- 4 Now, choose a domain name.
- 5 Check availability of domain.



6 Register the new domain.

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 Help for this 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.

Step 3 Domain Ready for Testing

```
graph LR; A[Choose Domain Name] --> B[Domain Registration Pending]; B --> C[Domain Ready for Testing]; C --> D[Domain Deployed to Users];
```

Your domain name is `tedomain.my.salesforce.com`

Your domain name is ready. Log in to test it 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.

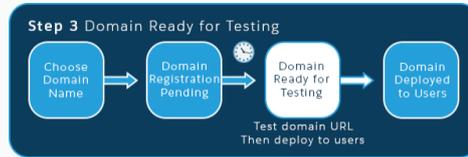
⚠ Log in with your domain URL to deploy your domain.

[Deploy to Users](#) Roll out the new domain to your org. [i](#)

9 Now, deploy domain for all users.

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.my.salesforce.com**

Your domain name is ready. Log in to test it 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.

[Deploy to Users](#) Roll out the new domain to your org. [1](#)

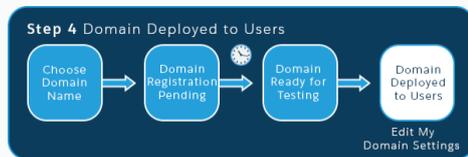
The screenshot shows the Salesforce My Domain Step 3 interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Accounts', 'Leads', 'Opportunities', 'Reports', 'Dashboards', 'Chatter', 'Files', and 'Products'. A search bar is on the left, and '30 Days Remaining' and 'Subscribe Now' are on the right. A central banner reads 'It's Better in Lightning' with a 'Check Readiness' button. Below this, the 'My Domain' section is active, showing the same flowchart as above. A 'Deploy to Users' button is visible at the bottom. A modal dialog box is open, stating: 'tedomain.my.salesforce.com says: When you deploy the new domain, we activate it immediately. Only Salesforce Customer Support can disable or change your domain name once it's deployed.' with 'OK' and 'Cancel' buttons.

My Domain

[Help for this Page](#)

My Domain Step 4

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.

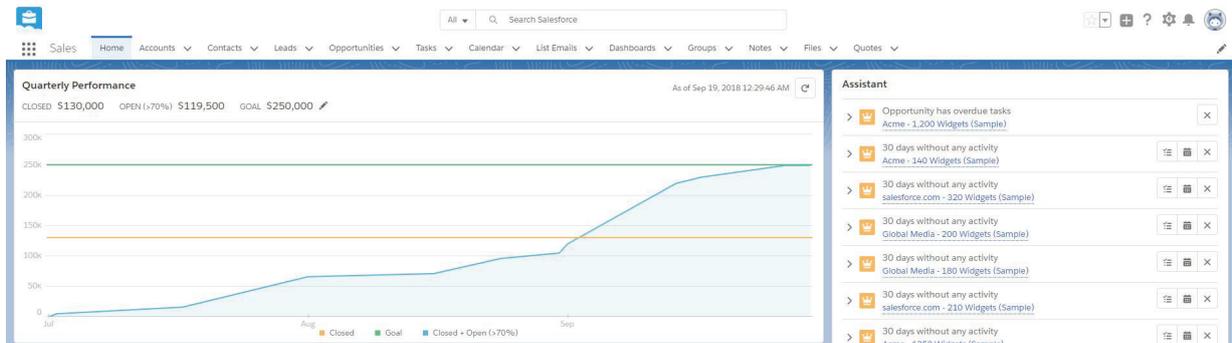


Your domain name is **tedomain.my.salesforce.com**

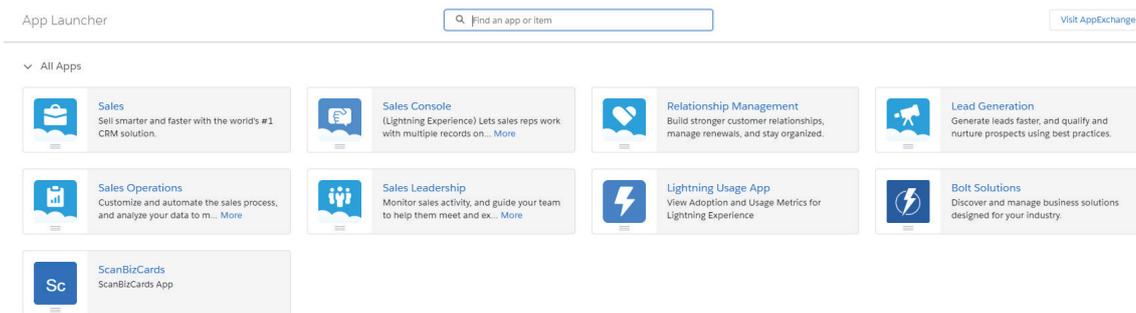
Creating Profiles

How to Create a User Profile

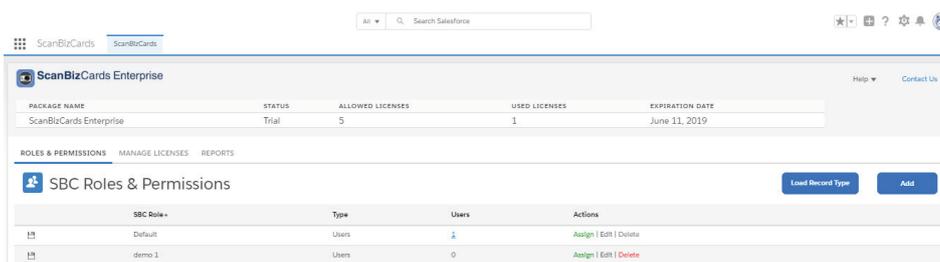
- 1 Let's go to the ScanBizCards Managed package. For this, go to the tabs section in Salesforce environment and click on nine dots icon to view all options.



A list of all tabs will appear.

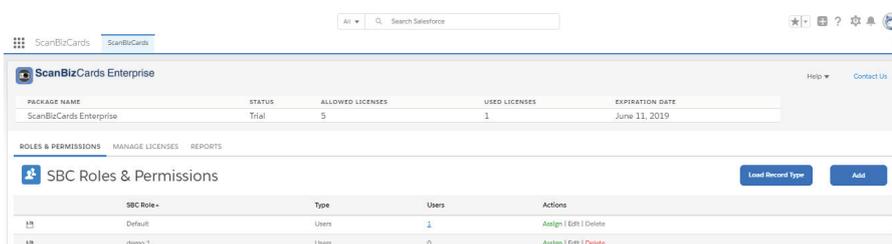


- 2 Click on the 'ScanBizCards' option. The ScanBizCards package page will load. The Settings page for the Managed package will open.

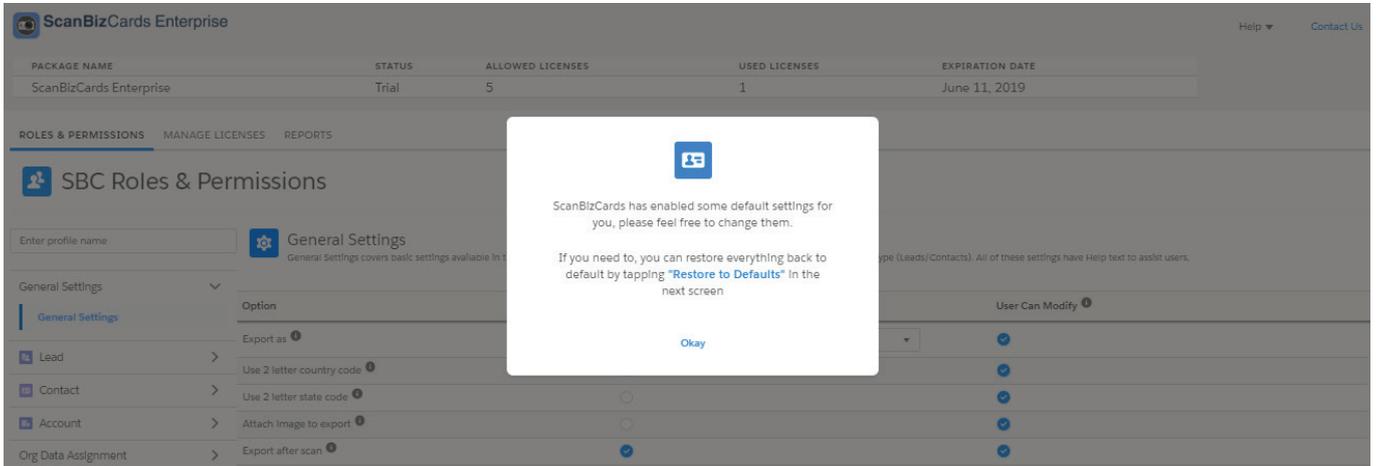


- 3 This page shows the list of all profiles that the Admin user has created.

- 4 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'.



- 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.



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

SBC Roles & Permissions

Option	Value	User Can Modify
Export as	Lead	Yes
Use 2 letter country code	No	Yes
Use 2 letter state code	No	Yes
Attach image to export	No	Yes
Export after scan	Yes	Yes
Prompt to export later	No	Yes
Duplicate Criteria	<input type="radio"/> None <input type="radio"/> FirstName <input type="radio"/> LastName <input type="radio"/> Email <input type="radio"/> Company <input type="radio"/> Phone	
Update duplicates	Yes	Yes
Allow duplicate search across objects	No	
Opt in to Smart OCR	Yes	
Hide 'Store as default'	No	
User can modify campaigns	Yes	

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, 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.
Use 2 letter state code	YES / NO	YES / NO	
Attach image to export	YES / NO	YES / NO	Whether to attach the image of the business 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 connectivity, 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

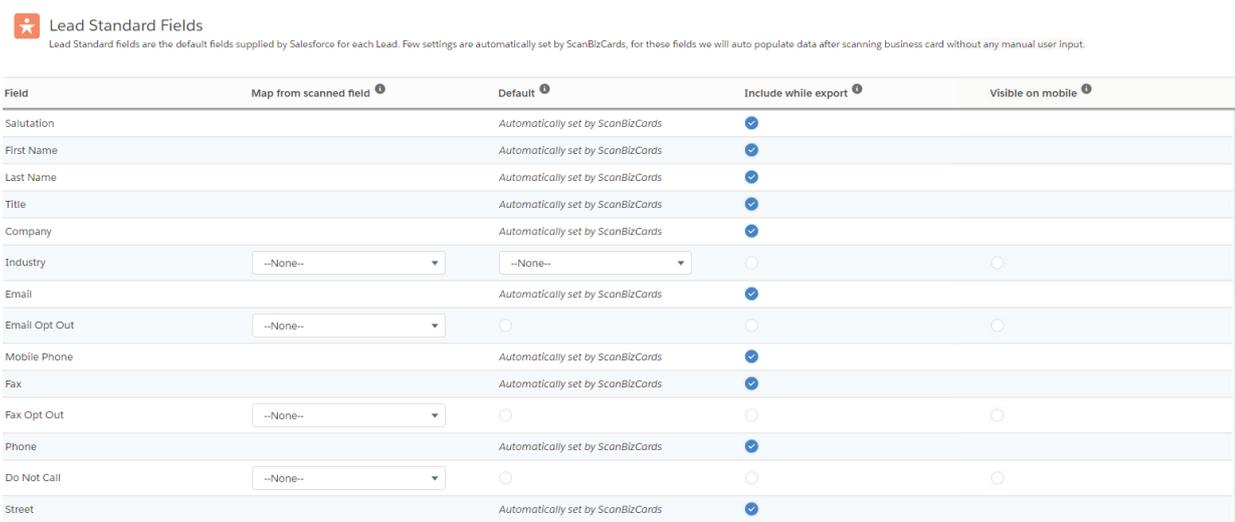
1 Click Lead - Lead settings will be displayed



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.



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.

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
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

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 map with respective field.		Default Included	Optional for user
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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

1 Click Contact- Contact settings will be displayed

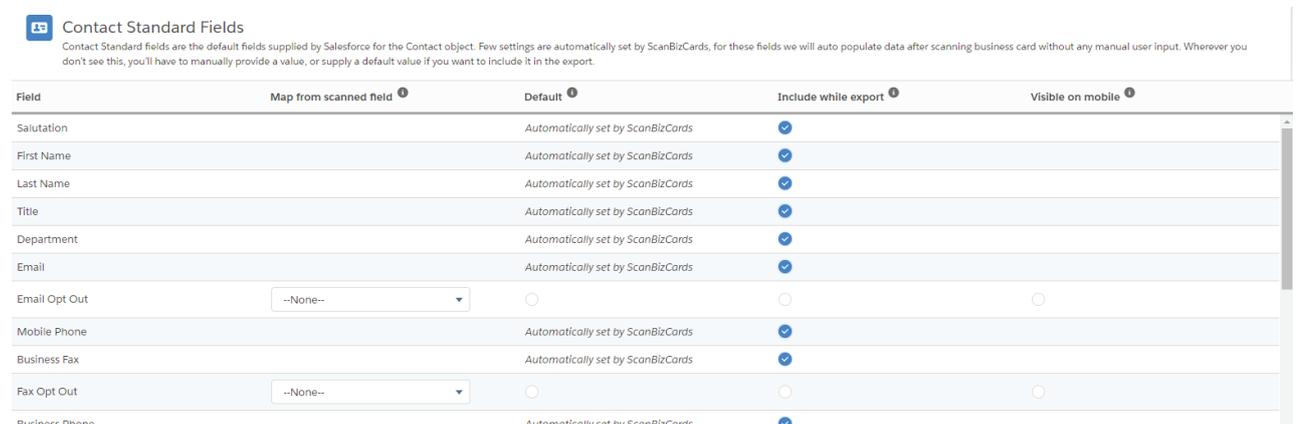


2 There are two options available:

- **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.



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
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.

Account

1 Click Account- Account Settings will be displayed



Option	Value
User can modify Account fields	<input checked="" type="checkbox"/>
User can create accounts	<input checked="" type="checkbox"/>

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 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 ¹	Default ²	Include while export ³	Visible on mobile ⁴
Salutation		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
First Name		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Last Name		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Title		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Department		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Email		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Email Opt Out	--None--	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile Phone		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Business Fax		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Fax Opt Out	--None--	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Phone		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Do Not Call	--None--	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mailing City		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Mailing Country		Automatically set by ScanBizCards	<input checked="" type="checkbox"/>	
Mailing Latitude			<input type="checkbox"/>	<input type="checkbox"/>

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

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

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).



Assign: Accounts

This section displays all Accounts available in your Salesforce Instance. The Accounts will display their name, and geographic location (City/State, if available). 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. (Note that 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	<input type="checkbox"/> Visible on mobile	City/State
All		
Burlington Textiles Corp of America	<input checked="" type="checkbox"/>	Burlington/NC
Dickenson plc	<input checked="" type="checkbox"/>	Lawrence/KS
Edge Communications	<input checked="" type="checkbox"/>	Austin/TX
Express Logistics and Transport	<input checked="" type="checkbox"/>	Portland/OR
GenePoint	<input checked="" type="checkbox"/>	Mountain View/CA
Grand Hotels & Resorts Ltd	<input checked="" type="checkbox"/>	Chicago/IL
Pyramid Construction Inc.	<input checked="" type="checkbox"/>	Paris/
sForce	<input checked="" type="checkbox"/>	San Francisco/CA
United Oil & Gas Corp.	<input checked="" type="checkbox"/>	New York/NY
United Oil & Gas, Singapore	<input checked="" type="checkbox"/>	Singapore/Singapore

Items Per Page : 10 Page : 1 of 2

Assign: Campaigns:

- 1 This section displays all the campaigns available in your salesforce instance.
- 2 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.

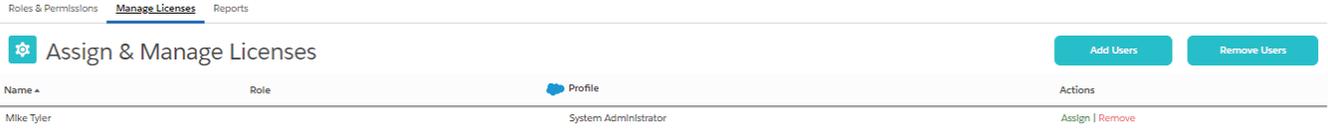
Name ▲	Email	Type	Visible on mobile
<input type="text" value="Q Search..."/>	<input type="text" value="Q Search..."/>	<input type="text" value="Filter by..."/>	<input type="text" value="Filter by..."/>
Danny Panzer		user	<input type="checkbox"/>
DPQueue2		queue	<input type="checkbox"/>
International Leads		queue	<input type="checkbox"/>
Manish Rupani		user	<input type="checkbox"/>
Michael Driscoll		user	<input type="checkbox"/>
NewQueue		queue	<input type="checkbox"/>
Patrick Questembert		user	<input type="checkbox"/>
tom ronan		user	<input type="checkbox"/>
US Leads		queue	<input type="checkbox"/>

Items Per Page : Page : of 1

For Admins

Instructions for Admin Users

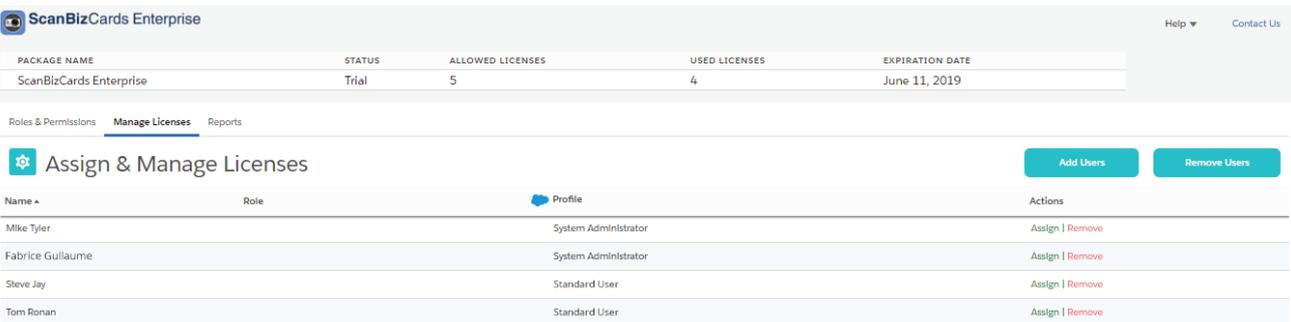
These instructions are solely for admin users of ScanBizCards Enterprise. Admin users can now access all major app functionality using a single window.



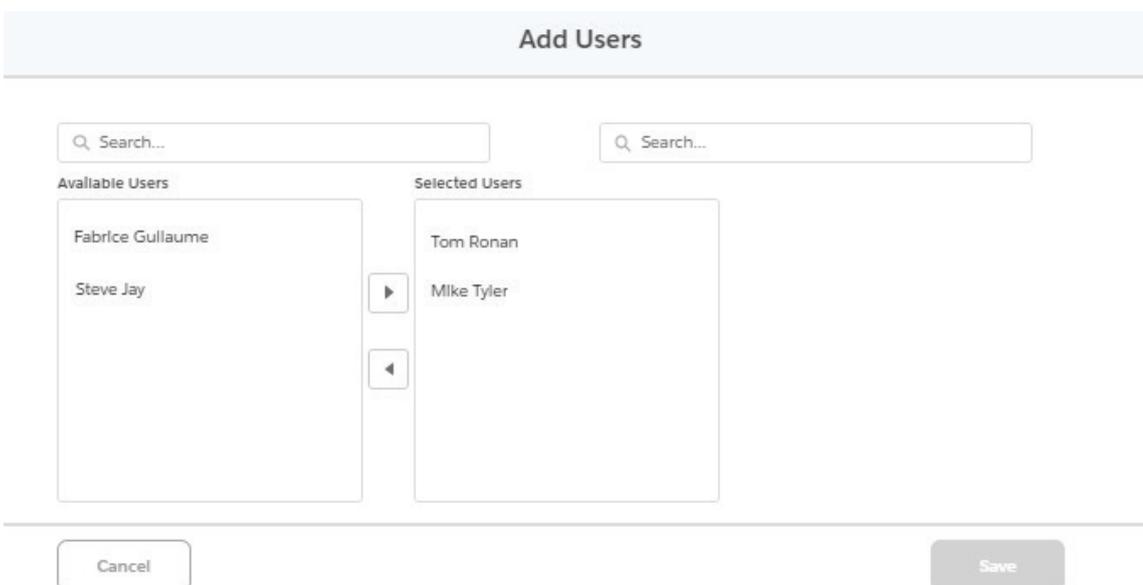
How to Manage Licenses

Assigning Roles and Licenses:

- 1 Click 'Manage Licenses'



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



3 Click Save.

Add Users

Search... Search...

Available Users
Steve Jay

Selected Users
Tom Ronan
Mike Tyler
Fabrce Gullaume

Cancel Save

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

Assign & Manage Licenses Add Users Remove Users

Name	Role	Profile	Actions
Mike Tyler		System Administrator	Assign Remove
Peter Nikolson		System Administrator	Assign Remove
Steve Jay		Standard User	Assign Remove
Tom Ronan		Standard User	Assign Remove

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

Assign Roles

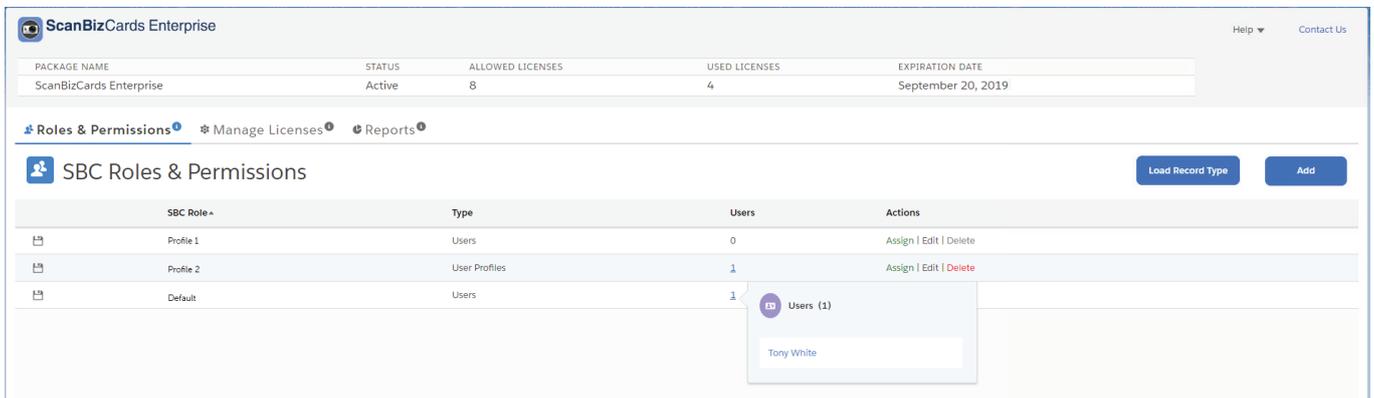
Available Roles Search...

- Profile 1
- Profile 2
- Default

Cancel Save

6 Assign a ScanBizCards role to the user and click 'Save'

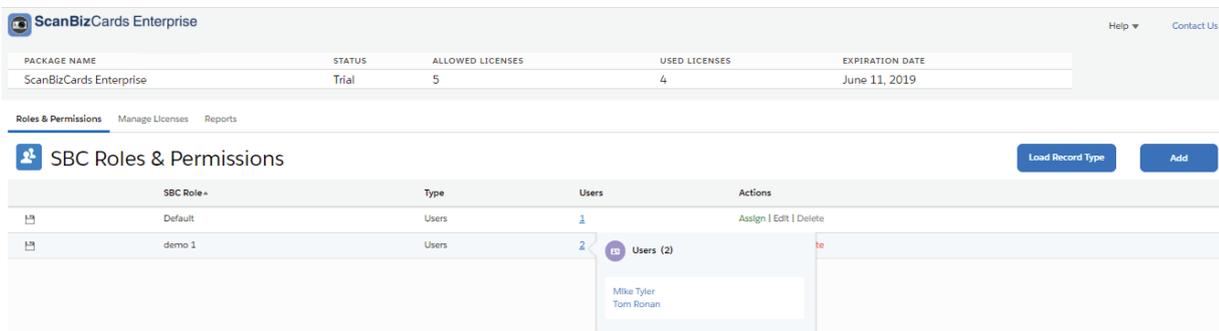
7 Go to 'SBC Roles & Permissions' tab. Click the number of users corresponding to the role you assigned to the user. The list of users under that role will be displayed.



The role has been assigned successfully.

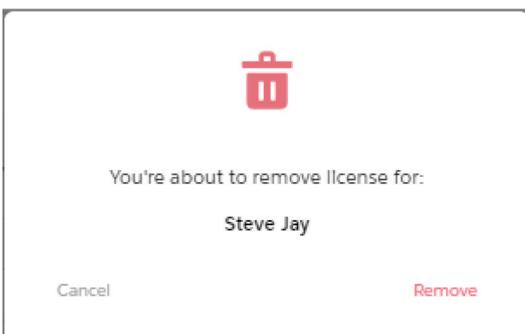
Revoking User Licenses:

1 Go to the Manage Licenses tab.



2 For revoking individual licenses:

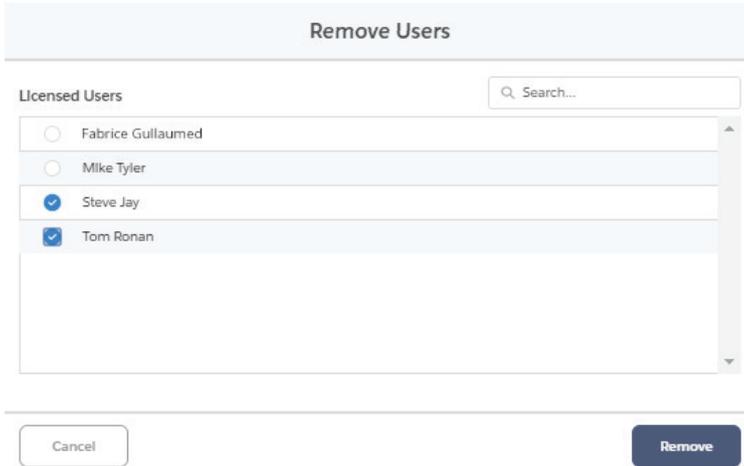
- Under the Actions title, click Remove corresponding to the individual's name.
- A pop up will be displayed.



- 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.

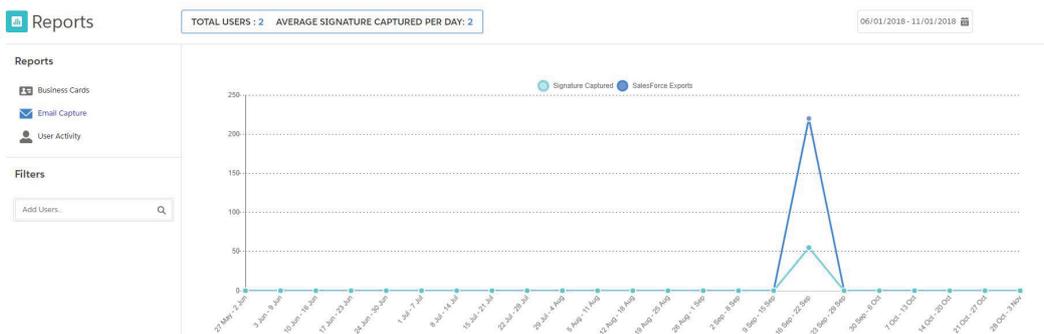


- Select users whose licenses need to be revoked.
- Click Remove and you're done.

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

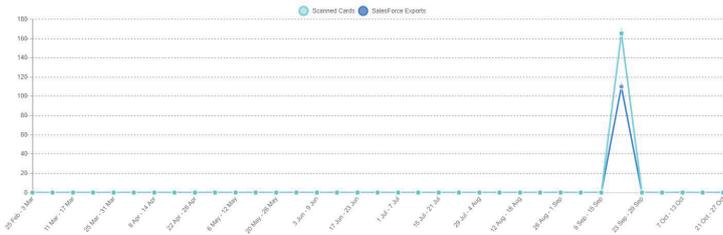


Business Cards:

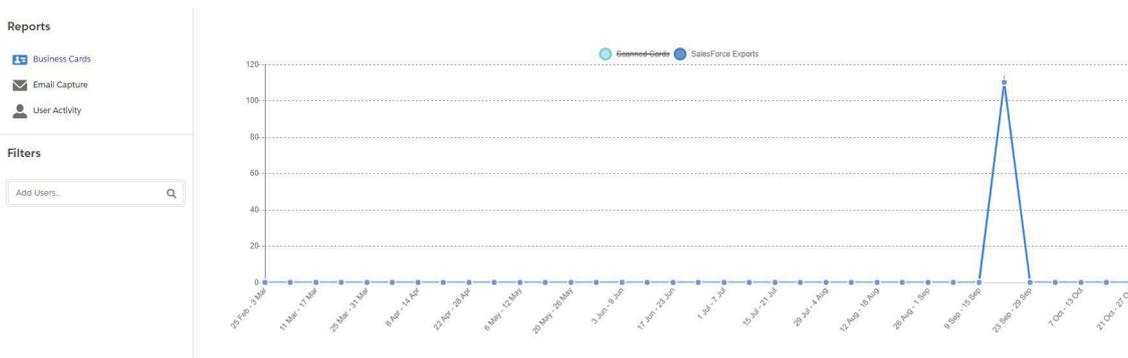
1 Select a time period for the report. Click Apply.



- 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.
- 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.



- Admin user can also choose to view the graph selectively for scanned cards 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.

Email Signature Capture:

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

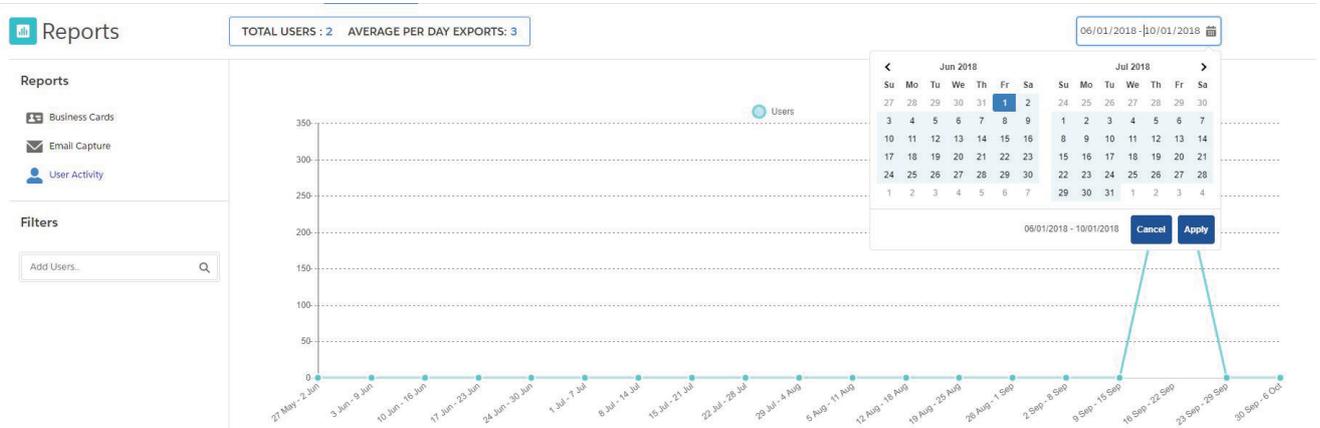
TOTAL USERS : 0 AVERAGE SIGNATURE CAPTURED PER DAY: 0

05/16/2019 - 08/14/2019

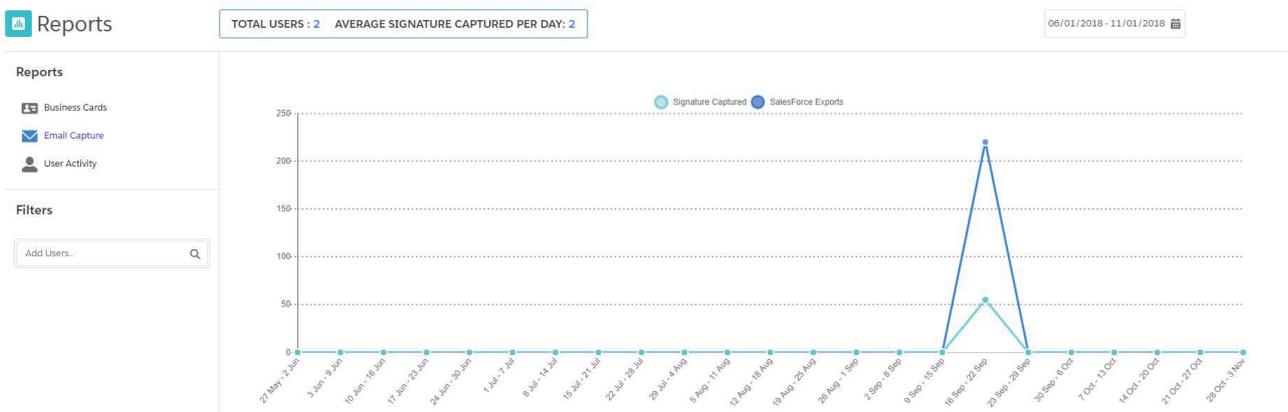


Sorry, there are No Signature Capture Reports to show.
Your License users have not linked any email accounts for Signature Capture.

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



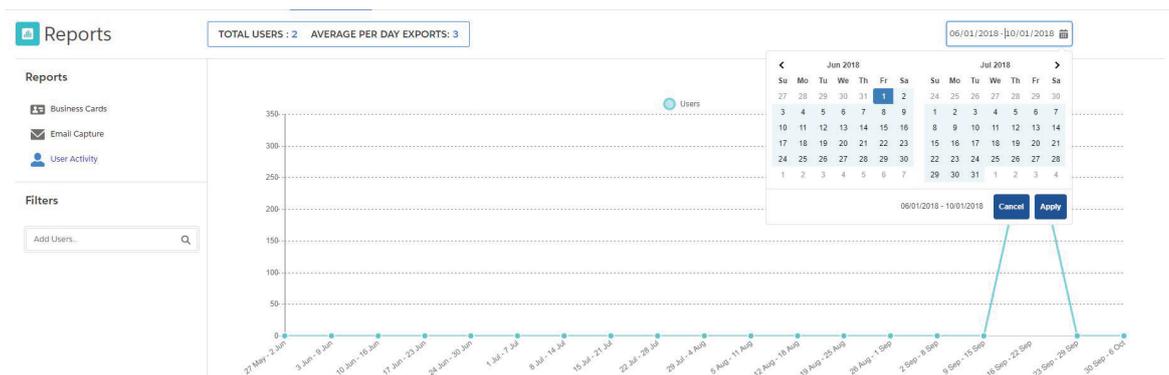
- At the top, the total number of users along with the average number of email signatures captured per day during the selected time period will be displayed.
- In addition, the report will also graphically display the number of email signatures captured versus the number of email signatures exported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



- 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:

- 1 Select a time period for the report. Click Apply.



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.

4 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 ¹	Captures Exported ¹	Total ¹ ▲	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 Salesforce1 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 -

1 Go to Setup in your SF org, then choose Feature Settings > Chatter > Chatter Settings

2 Ensure that Chatter is enabled



3 Ensure that Publisher Actions are enabled



4 Go to Setup > User Interface > Global Actions > Publisher Layouts

5 Edit the Global Layout

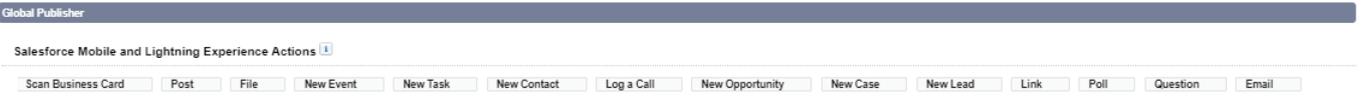
Action	Publisher Layout Name	Created By	Modified By
Edit Del	Global Layout	David Fowler, 9/26/2018 2:25 AM	David Fowler, 9/26/2018 2:25 AM

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”)



- 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:



- 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
- 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.

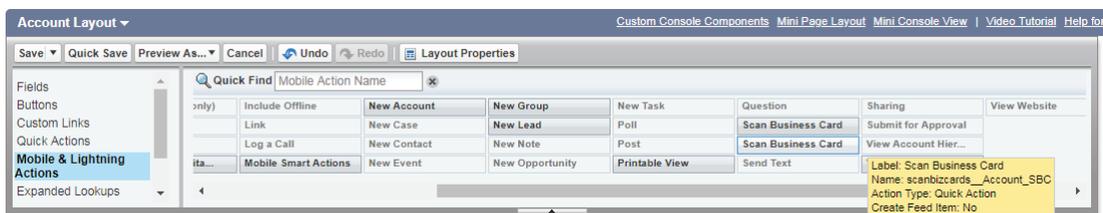
- 8 Click the "Save" button located on top left

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

[Please Note: Steps 9—13 are Optional]

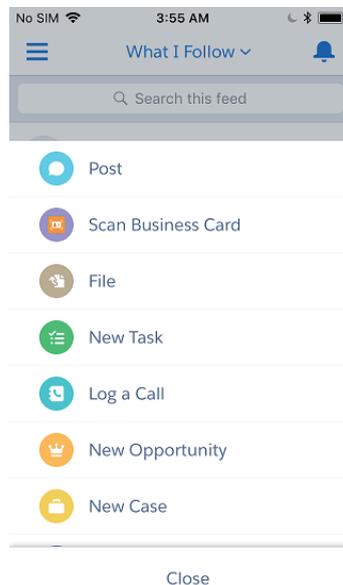
Follow these steps only if you want the Scan Business Card action to also be available from the actions menu when looking at a particular account within Salesforce1: Assigning Licenses

- 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



- 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