



ScanBizCards

Snap. Touch. Connect.

Installing ScanBizCards with the Salesforce Mobile App

Contents

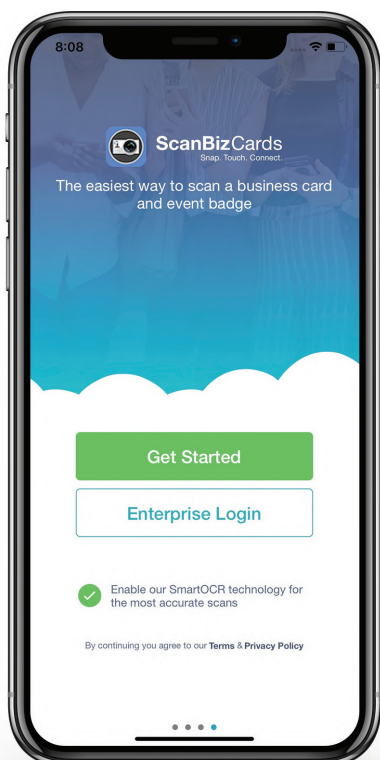
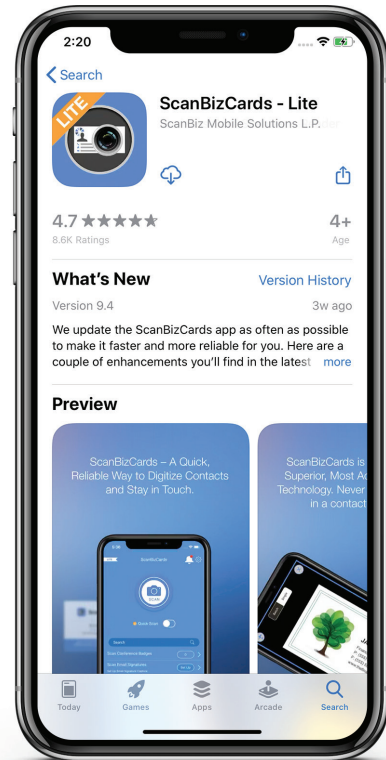
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Instructions for iPhone Users

These instructions are for the end users of ScanBizCards Enterprise. They will need to install the ScanBizCards Lite mobile application AFTER they have been licensed.

- 1 Navigate to the iOS app store.
- 2 Search for “ScanBizCards Lite” and install. This is the free version of our Application.

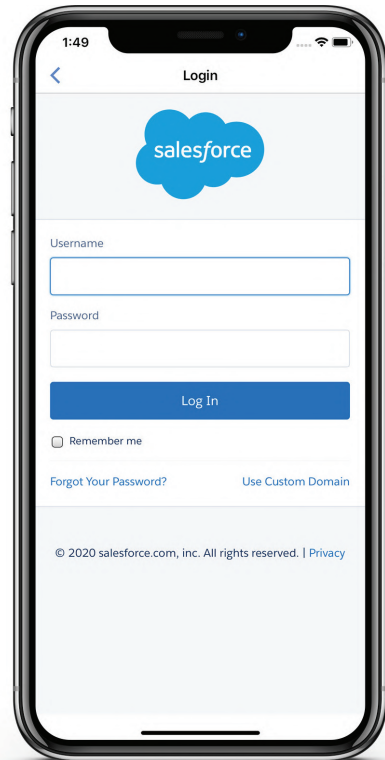
Please Note: Upon finishing the integration, the app will be upgraded to include all the paid app features in addition to our advanced Salesforce export options.



- 3 After installing ScanBizCards, open the application, after onboarding screen you will be redirected to the mentioned screen. Please tap on [Enterprise Login](#) to proceed further with Salesforce login process.

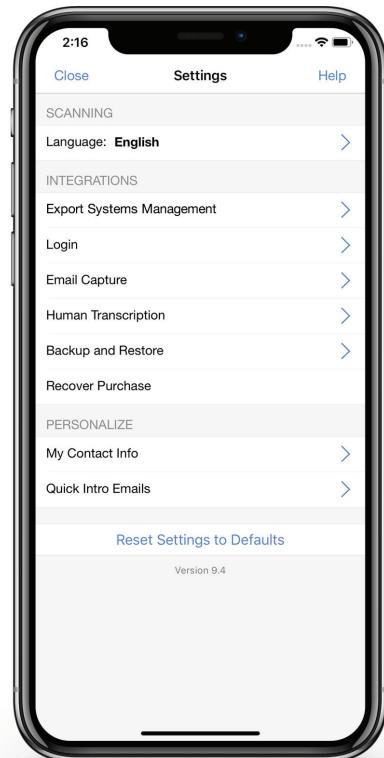
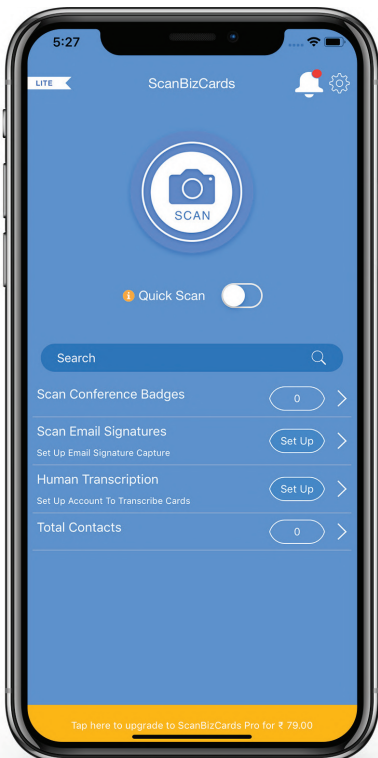
4 Please enter your Username & Password and tap on [Login](#).

5 If you would like to use Custom Domain, then tap on [Use Custom Domain](#). Please enter Custom Domain, tap on continue and enter your Username & Password to [login](#).

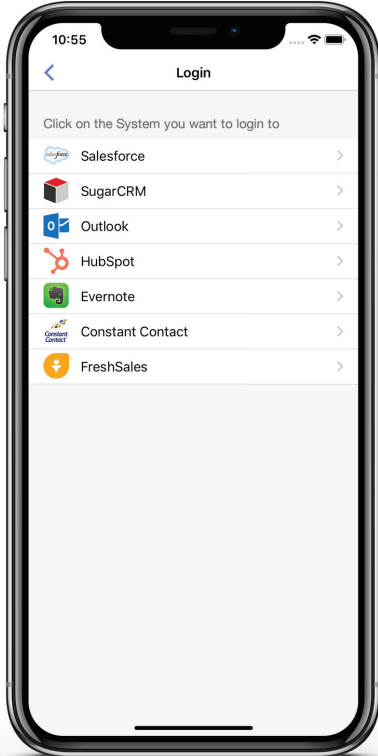


6 To login into Salesforce Sandbox tap on [Get Started](#) as per screen mentioned in step 3, user will be redirected to ScanBizCards's app home screen.

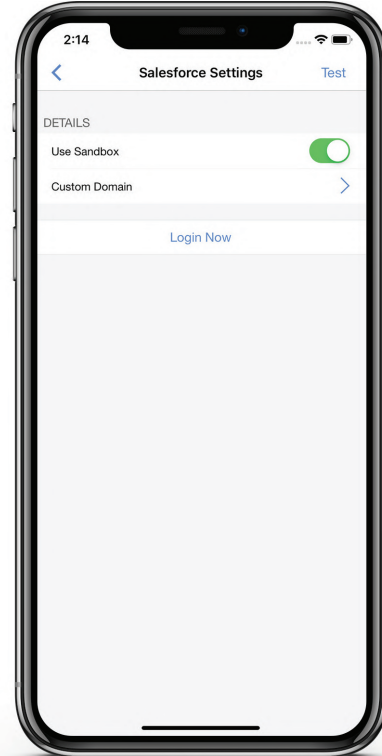
7 Go to [Settings](#), the gear icon on the top right in the previous image and then scroll down to "[Login](#)".



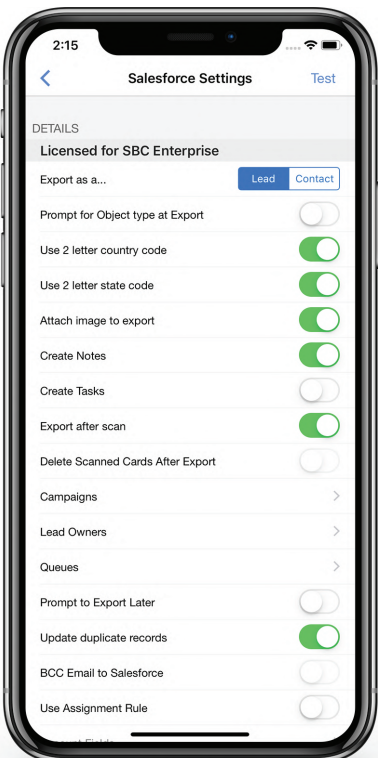
- 8 On the next screen locate **Salesforce** icon.



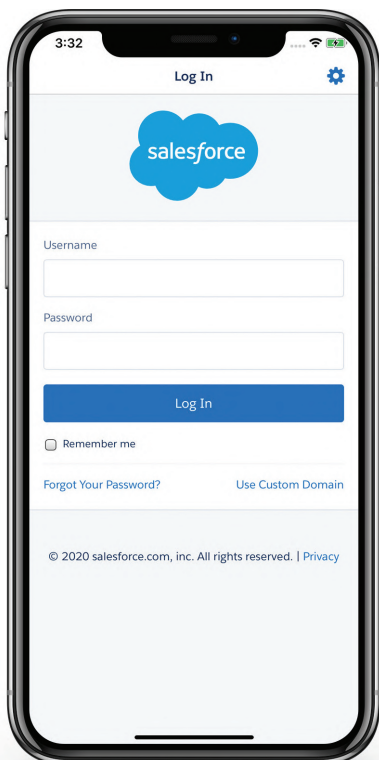
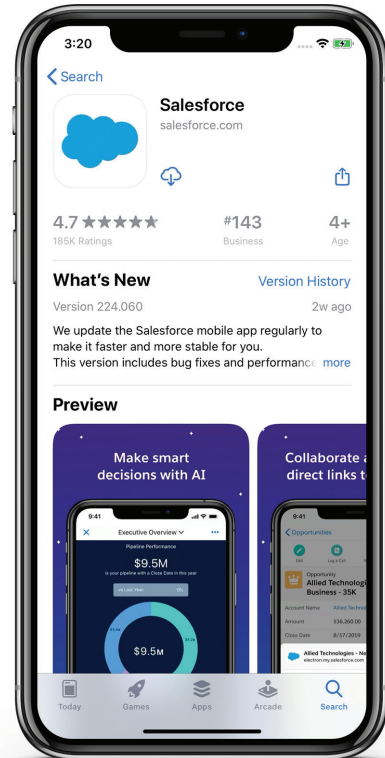
- 9 Once you click Salesforce Settings, Use the toggle switch to turn Sandbox on, and then tap on login now.



- 10 Once you have successfully logged in you should see the line, "**Licensed for SBC Enterprise**" at the top of the settings screen. You are now ready to start using ScanBizCards Enterprise.



- 11 Now download Salesforce mobile application from the app store.



- 12 After installation, launch the Salesforce mobile application. Provide your Salesforce username and password, and click **Login**.

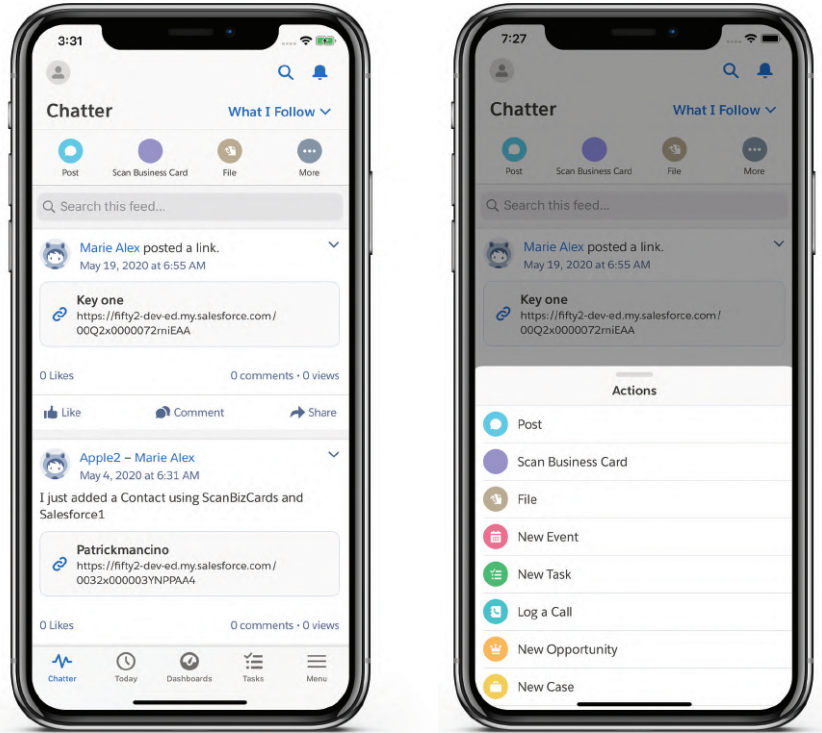
Note:

1. Please make sure that you are logged in with the same Salesforce user in both the applications (ScanBizCards and Salesforce).
2. If you want to login into Sandbox or use Custom Domain then click on the gear icon at the top.

13 After logging into the Salesforce mobile app, you will see a [Scan Business Card](#) option. Click the option.

Note:

If you are not able to see [Scan Business Card](#) option then contact your Salesforce admin.

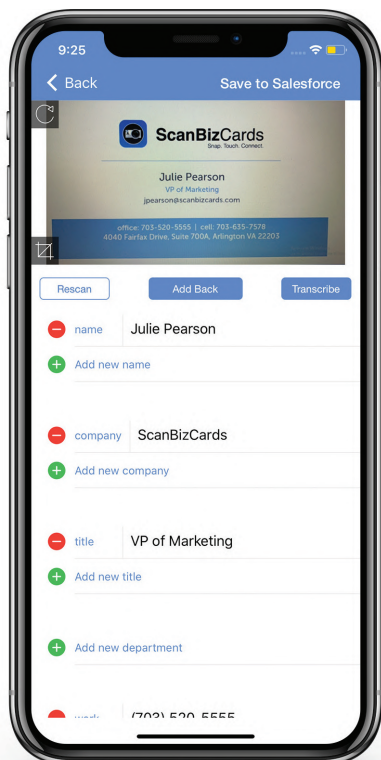


14 The [Scan Business Card](#) page will open.

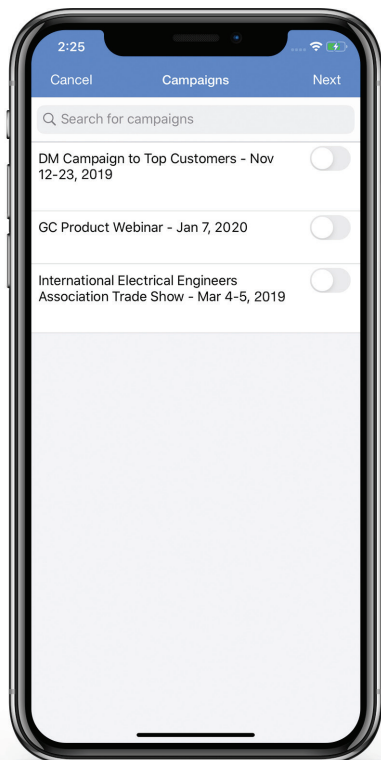
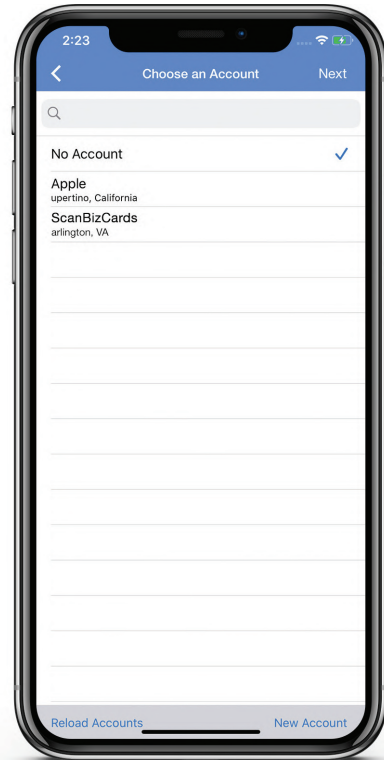
- 15 In a few seconds, you will be redirected to the ScanBizCards mobile app from where you can scan your business card.



- 16 Once the business card is scanned, contact details will be auto-populated. Contact information can be edited if required. You also have an option to send the card for human transcription, if required. Click [Save to Salesforce](#).

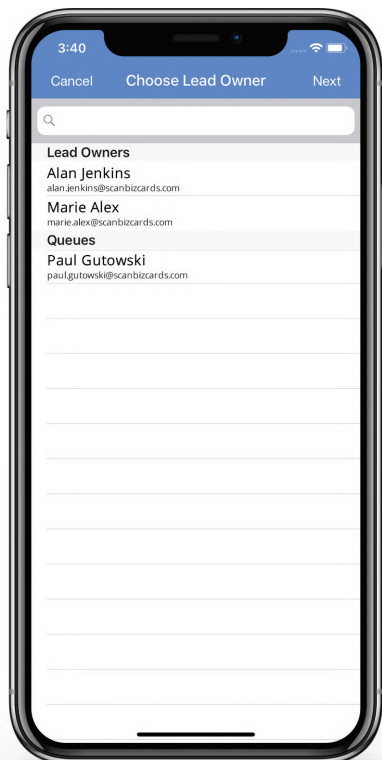


- 17 Choose an account where the contact will be saved. You can also create a new account or reload all accounts if desired. Click [Next](#).



- 18 Assign a Campaign to the contact. Click [Next](#).

19 Choose a **Record type** for the contact.

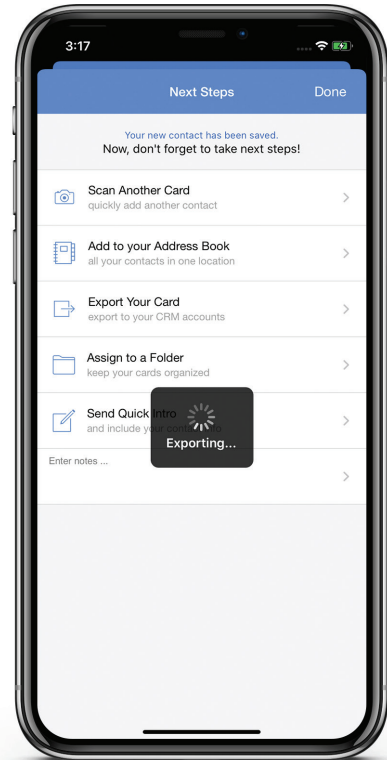


20 You'll then be prompted to choose a lead owner. Choose a Lead Owner and click **Next**.

21 The export process will be initiated.

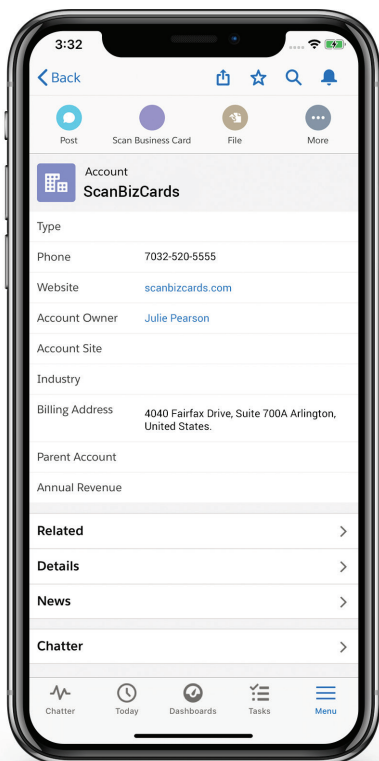
The export process will be initiated.

Note: After successfully exporting the contact to Salesforce, the user will again be redirected to the Salesforce mobile app.



ScanBizCards Interaction with Accounts Layout

If your Salesforce admin has added Scan Business Card action to the Accounts Layout, then you will be able to see [Scan Business Card](#) option on every account detail screen.



If you click [Scan Business Card](#) on any account detail screen, then the scanning process will start and the scanned card will be sent to Salesforce as a contact under the respective account.

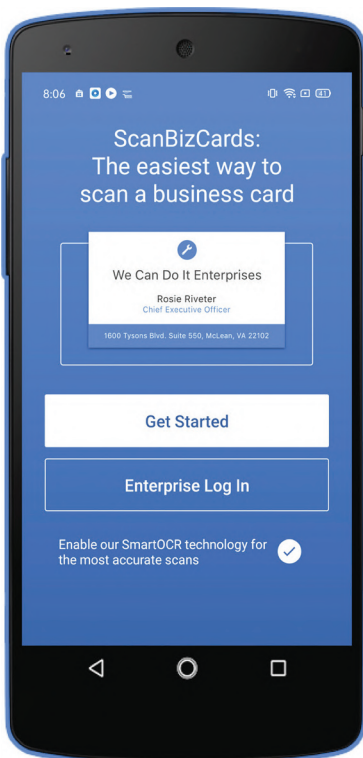
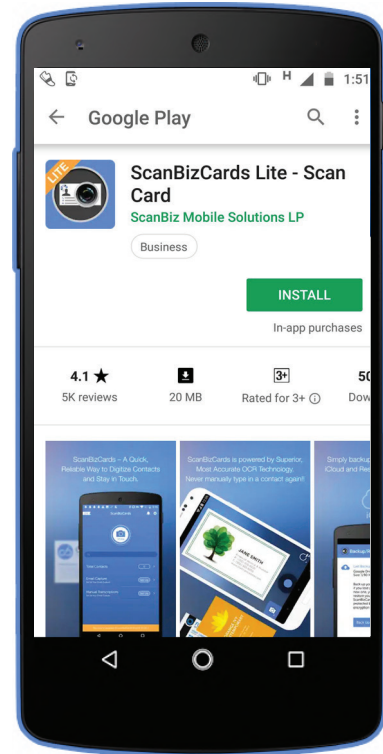
Instructions for Android Users

These instructions are for the end users of ScanBizCards Enterprise. They will need to install the ScanBizCards Lite mobile application AFTER they have been licensed.

- 1 Navigate to the **Play store**.
- 2 Search for “**ScanBizCards Lite**” and install. This is the free version of our application.

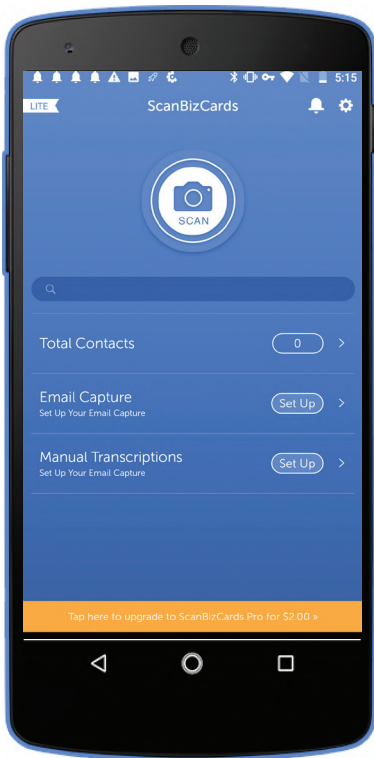
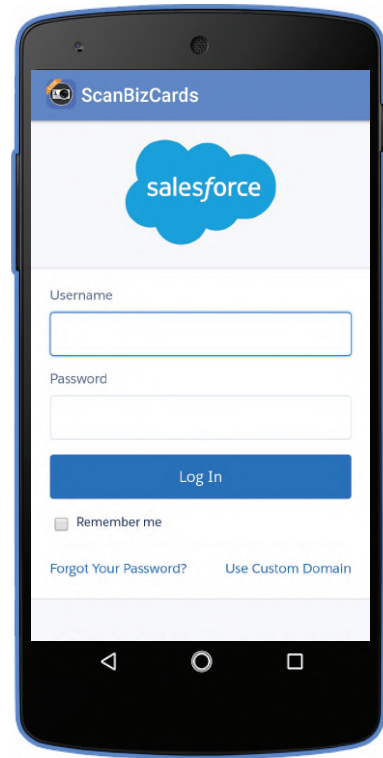
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Please Note: Upon finishing the integration, the app will be upgraded to include all the paid app features in addition to our advanced Salesforce export options.



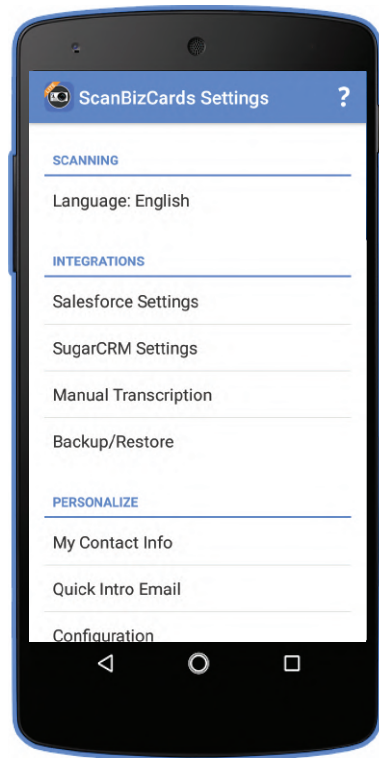
- 3 After installing ScanBizCards, open the application, after onboarding screen you will be redirected to the mentioned screen. Please tap on **Enterprise Login** to proceed further with Salesforce login process.

- 4 Please enter your Username & Password and tap on [Login](#).
- 5 If you would like to use Custom Domain, then tap on [Use Custom Domain](#). Please enter Custom Domain, tap on continue and enter your Username & Password to [login](#).

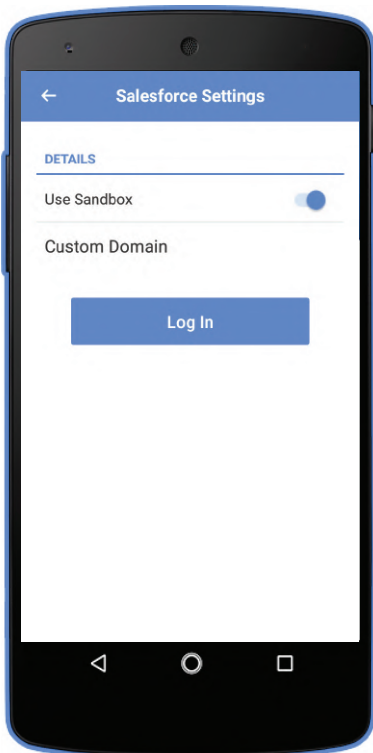


- 6 To login into Salesforce Sandbox tap on [Get Started](#) as per screen mentioned in step 3, user will be redirected to ScanBizCards's app home screen.

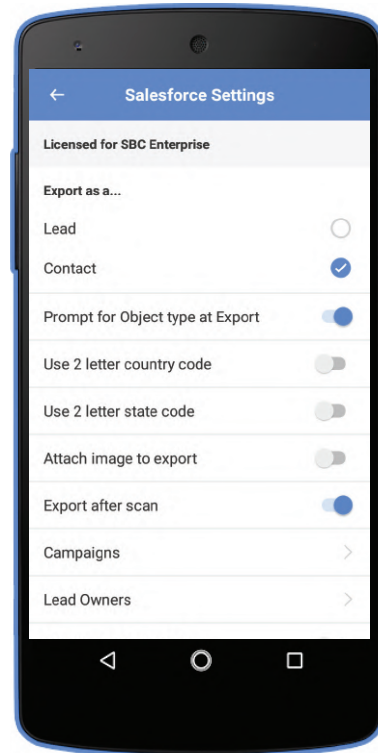
- 7 Go to Settings, the gear icon at the top right in the previous image. Locate “Salesforce Settings” under the “Integrations” section.



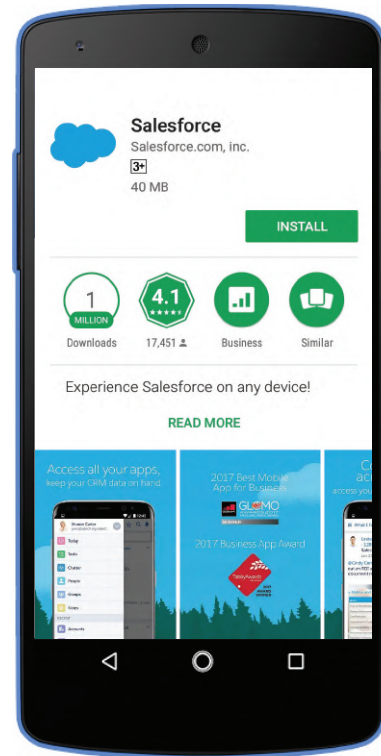
- 8 Once you click Salesforce Settings you will be prompted to log-in now use the toggle switch to turn Sandbox on, and continue the login process.



- 9 Once you have successfully logged in, you'll be able to view the settings. You are now ready to start using ScanBizCards Enterprise.



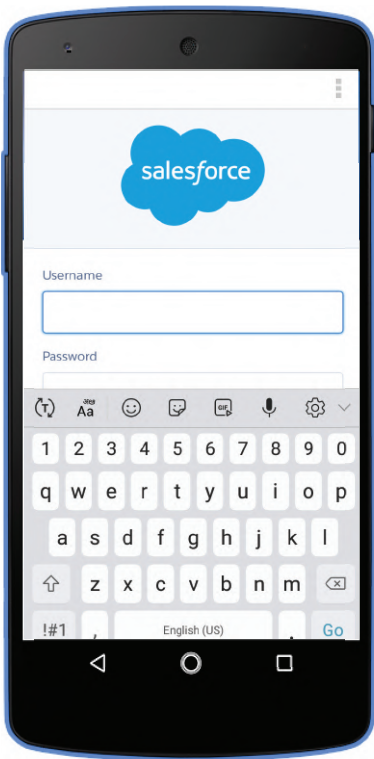
- 10 Now download Salesforce mobile application from the Play store.



- 11 After installation, launch the Salesforce mobile application. Provide your Salesforce username and password, and click login.

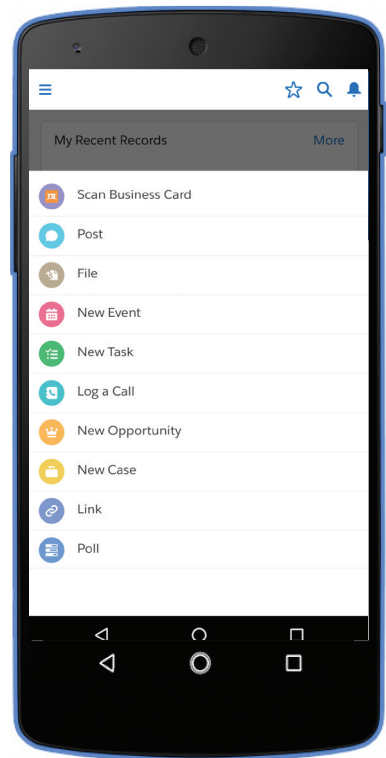
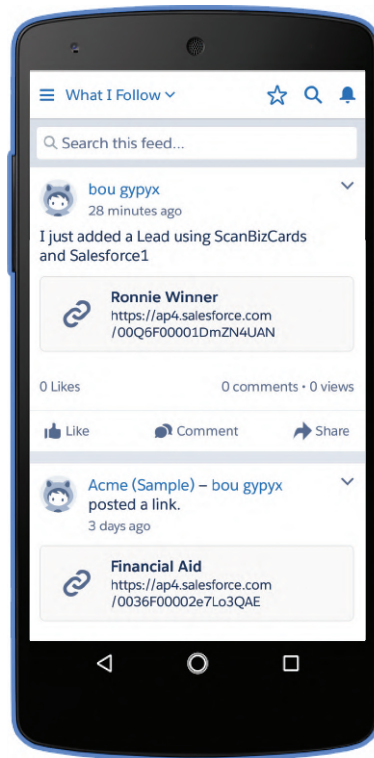
Note:

1. Please make sure that you are logged in with the same Salesforce user in both the applications (ScanBizCards and Salesforce)
2. If you want to login into Sandbox or use Custom Domain then click on the option menu icon(three dots) at the top.



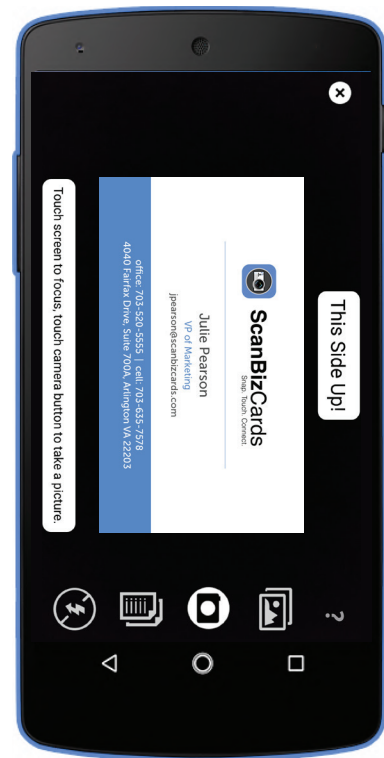
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Note: If you are not able to see Scan Business Card option then contact your Salesforce admin.

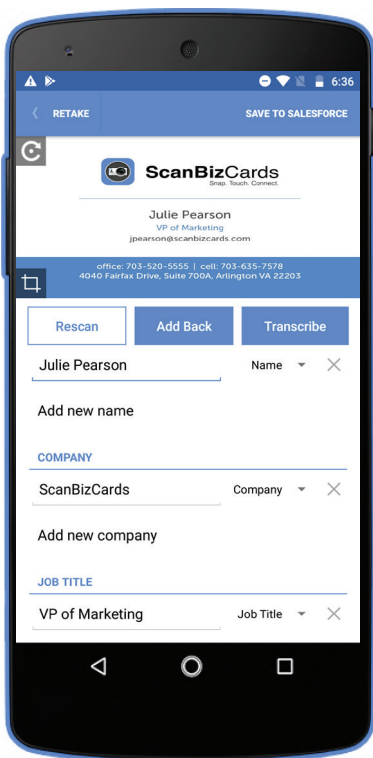


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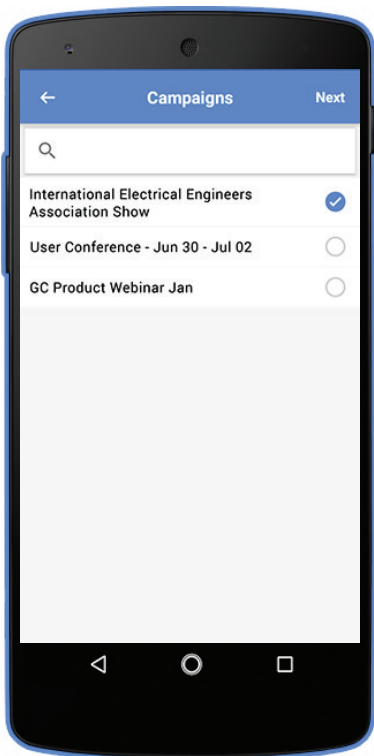
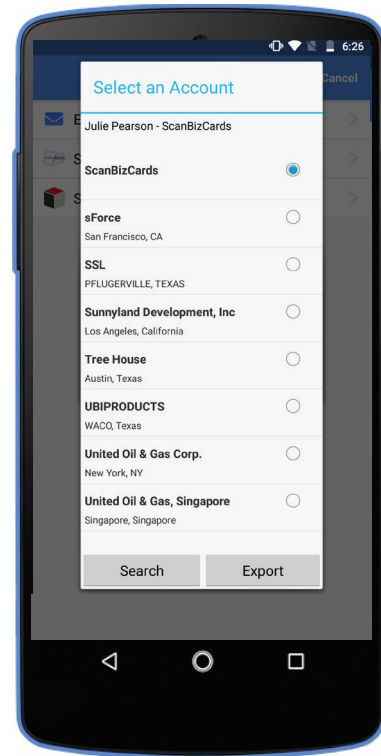
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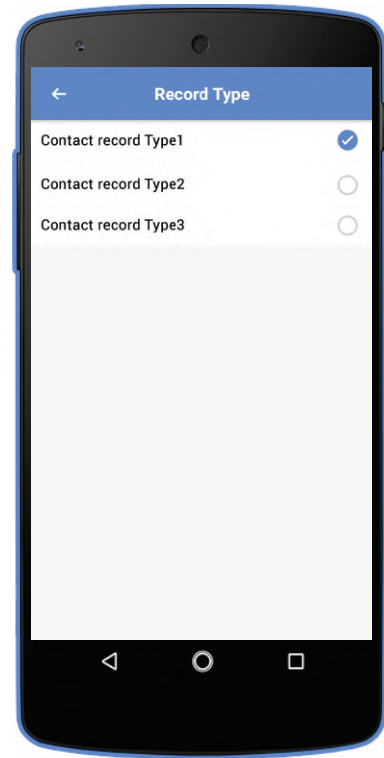


- 16 Choose an account where the contact will be saved. You can also create a new account if desired. [Click Export](#).

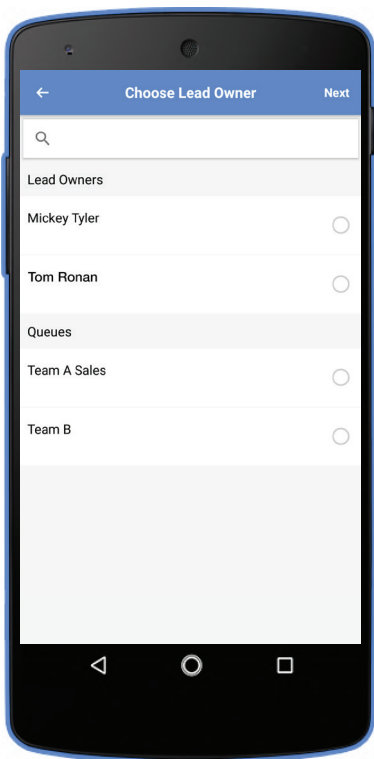


- 17 Assign a Campaign to the contact. [Click Continue](#).

- 18 Choose a [Record type](#) for the contact.

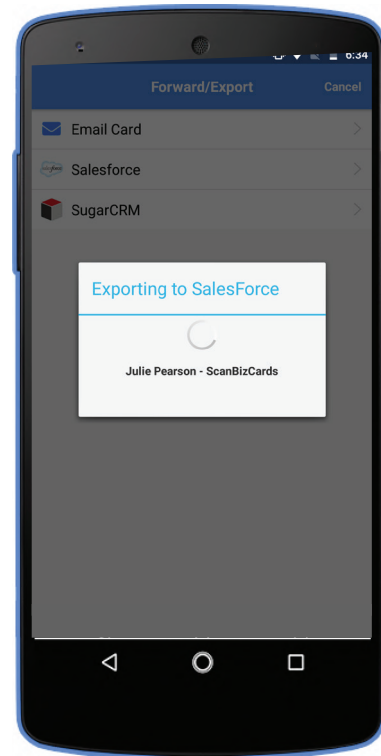


- 19 You'll then be prompted to choose a lead owner. Choose a Lead Owner and click [Continue](#).



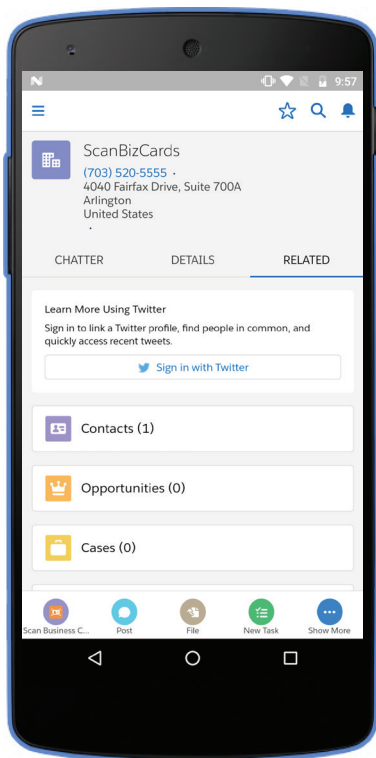
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Help and Support

Technical Support

If you have any questions, please contact us.

Email: enterprise@scanbizcards.zendesk.com