



# ScanBizCards

Snap. Touch. Connect.

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## Installing ScanBizCards on Your iOS Device

# 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 step-by-step guide will help you to install and use the ScanBizCards app on your iPhone. You'll also learn how to successfully integrate and export contacts to Salesforce.

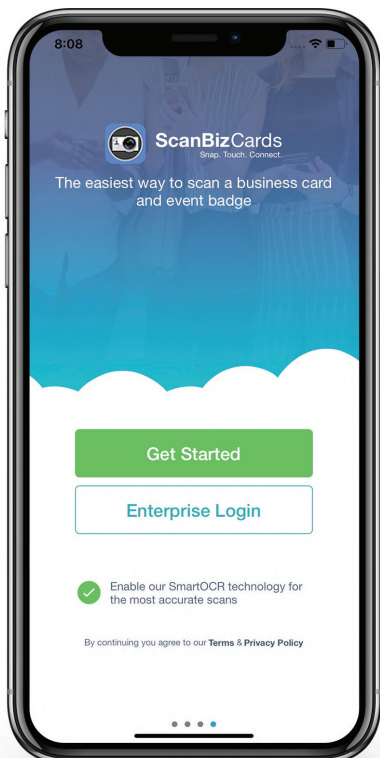
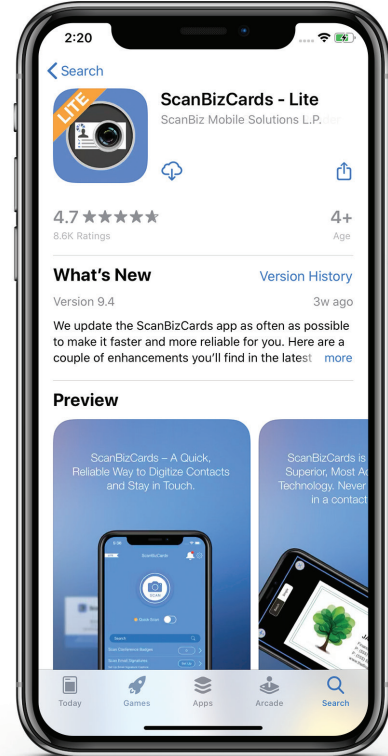
## Instructions for iPhone Users

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.

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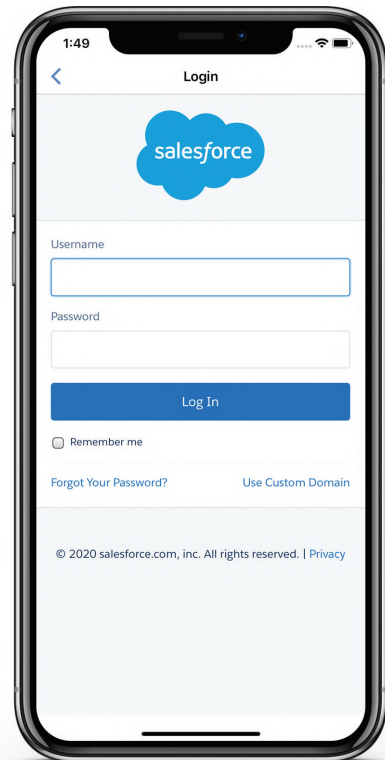
**Please Note:** Upon finishing the integration, the app will be upgraded to include all the paid app features in addition to our advanced Salesforce export options.



- 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.

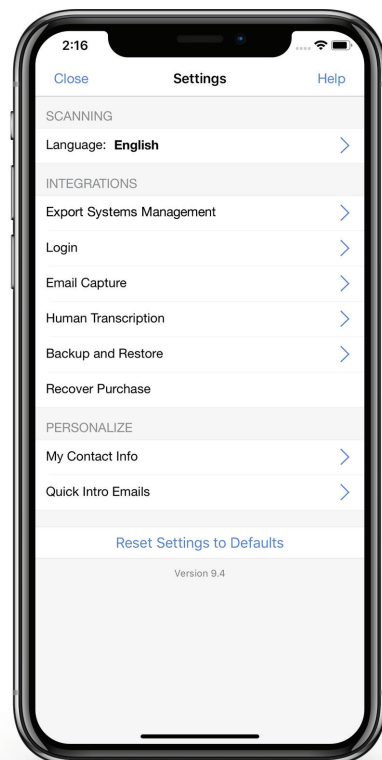
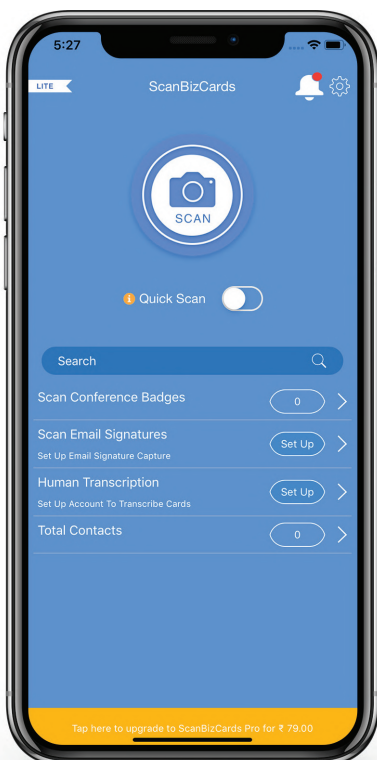
4 Please enter your Username & Password and tap on [Login](#).

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](#).

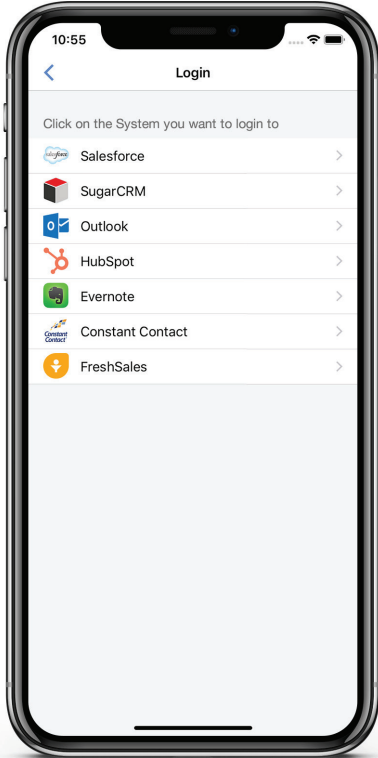


6 To login into Salesforce Sandbox tap on [Get Started](#) as per screen mentioned in step 3, user will be redirected to ScanBizCards's app home screen.

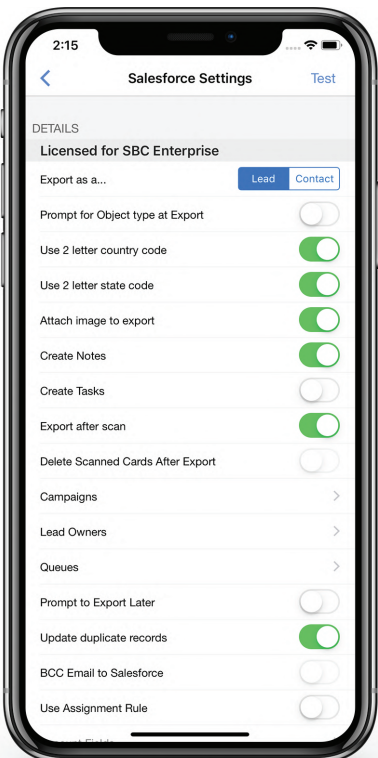
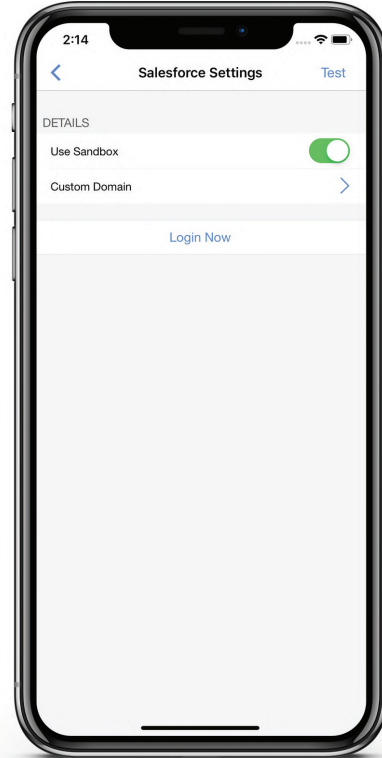
7 Go to [Settings](#), the gear icon on the top right in the previous image and then scroll down to "[Login](#)".



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

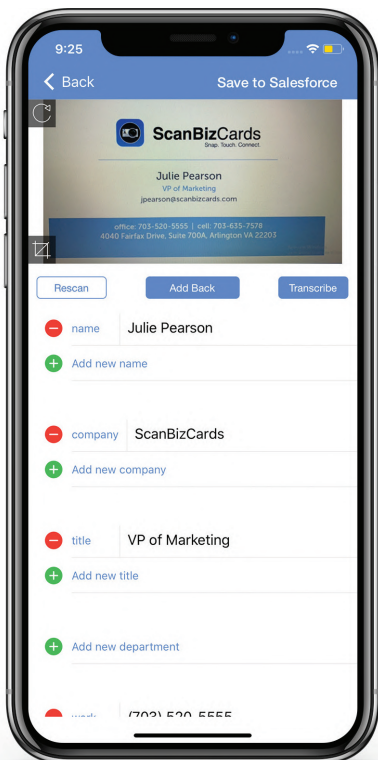
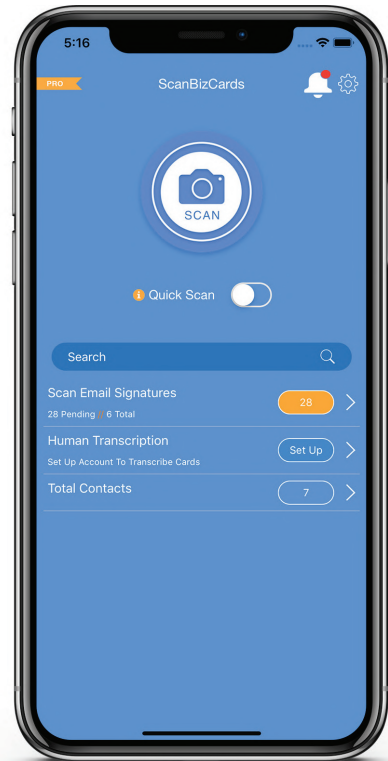


9 Once you click Salesforce Settings, Use the toggle switch to turn Sandbox on, and then tap on login now.



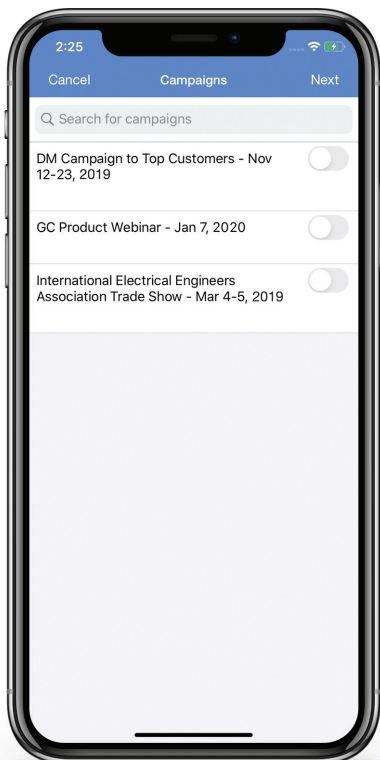
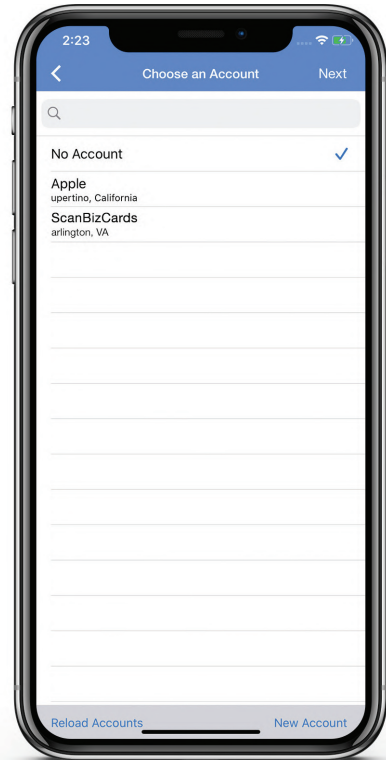
10 Once you have successfully logged in you should see the line, "**Licensed for SBC Enterprise**" at the top of the settings screen. You are now ready to start using ScanBizCards Enterprise.

- 11 Go to the home screen, press [Scan](#) to open a camera view. Start scanning your business card.



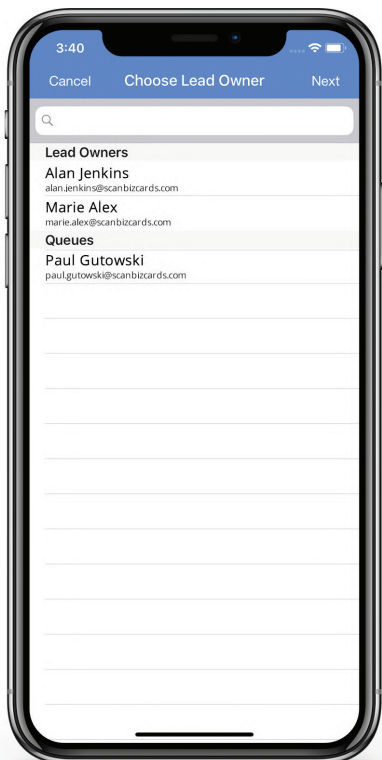
- 12 Once the business card is scanned, contact details will be auto-populated. Contact information can be edited if required. You also have an option to send the card for human transcription, if required. Click [Save to Salesforce](#) (the [Save to Salesforce](#) option will only appear when [Export After Scan](#) value is true in the managed package).

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



**14** Assign a Campaign to the contact. Click [Next](#).

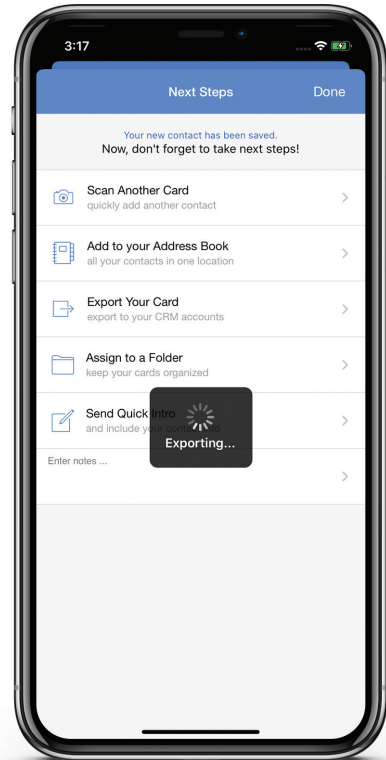
15 Choose a **Record type** for the contact.



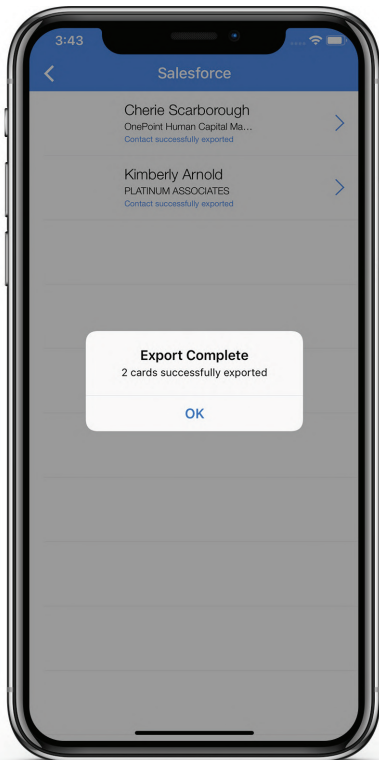
16 You'll then be prompted to choose a lead owner. Choose a Lead Owner and click **Next**.



17 The export process will be initiated.



18 Once the export is complete, you'll receive a success message. Congratulations, your contact has been successfully saved in Salesforce.



**Note:** If you are unable to change Salesforce settings on the mobile app, please contact your Salesforce admin.

Help and Support

## Technical Support

If you have any questions, please contact us.

Email: [enterprise@scanbizcards.zendesk.com](mailto:enterprise@scanbizcards.zendesk.com)