Scan to Salesforce

Administrator Guide

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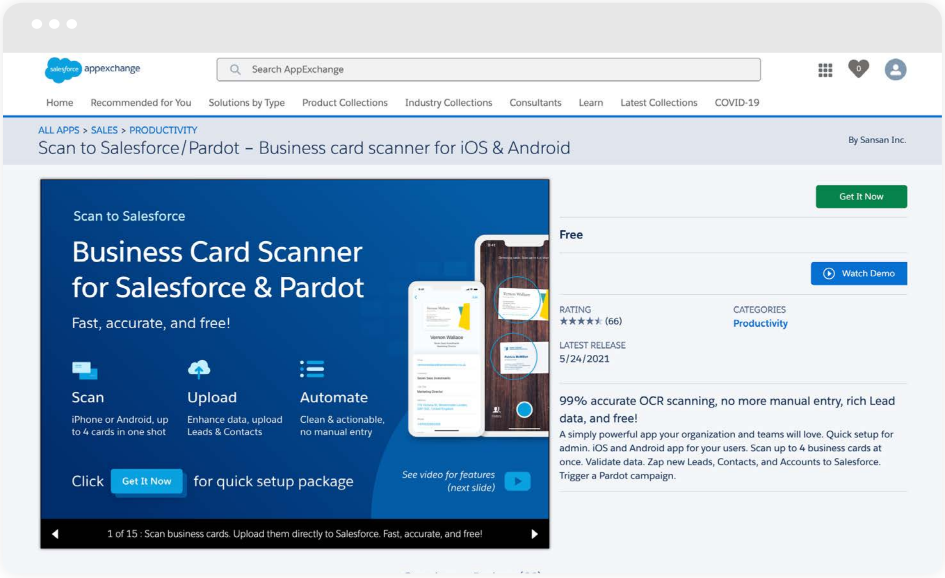
1. Setting up on Salesforce

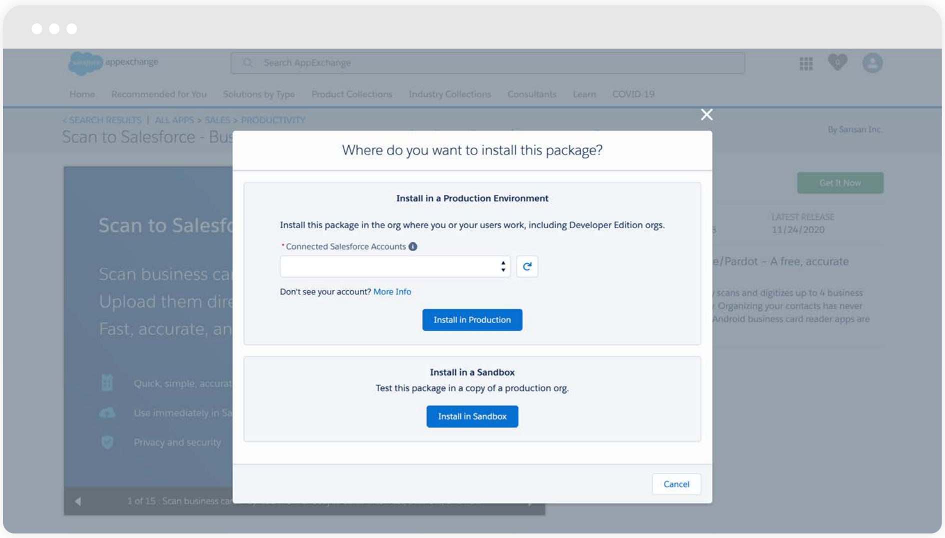
**You need to have an administrator account.*

1-1. Installation

Step 1: Install Scan to Salesforce from Salesforce AppExchange.



Step 2: Choose Install in This Org (production) or Install in a Sandbox Org.



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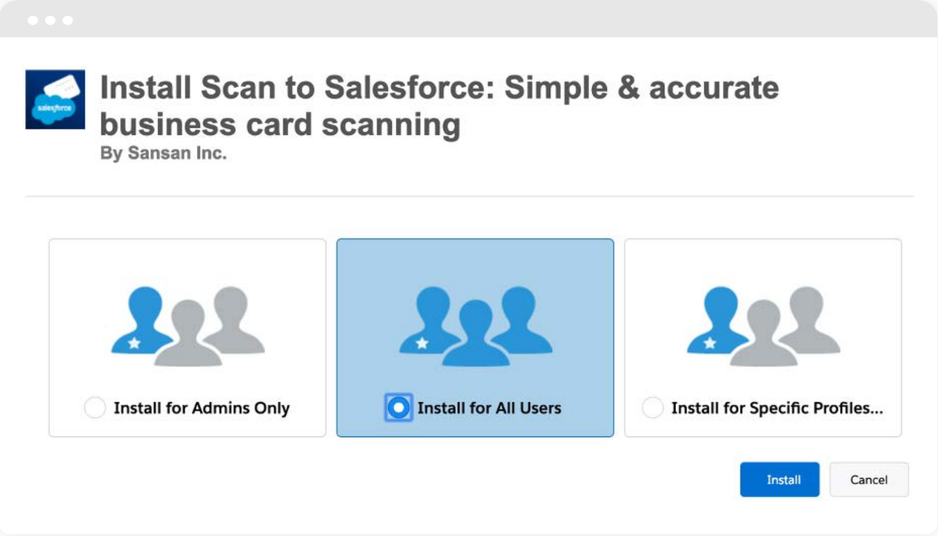
Step 3: Check Install for All Users (assuming you want all users in your organization to be able to use the app).

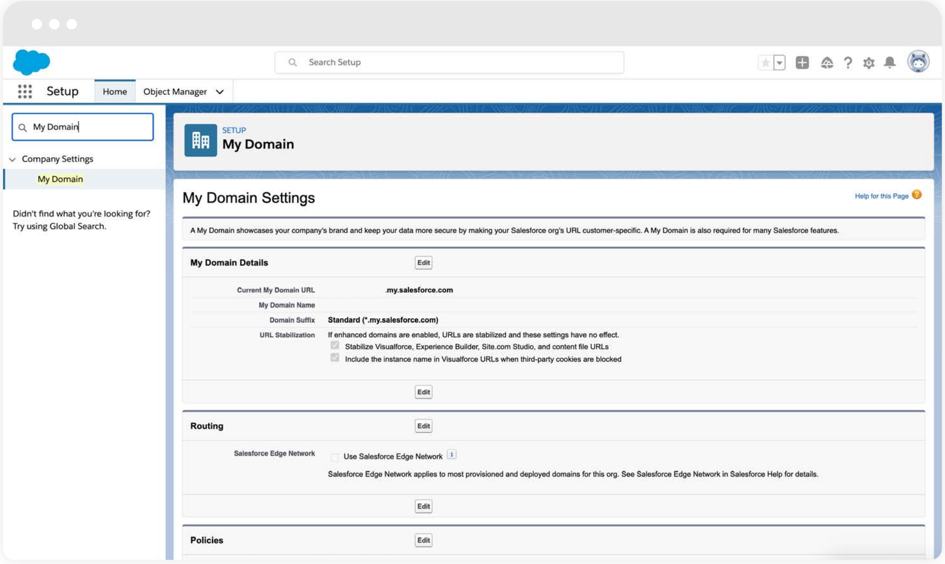


1-2. Custom domain settings

Scan to Salesforce requires that you have a custom domain.

To set this, go to Setup > Settings > Company Settings > My Domain to complete the settings. Setup is complete when you make the domain available to the org's users.

See here for more information.



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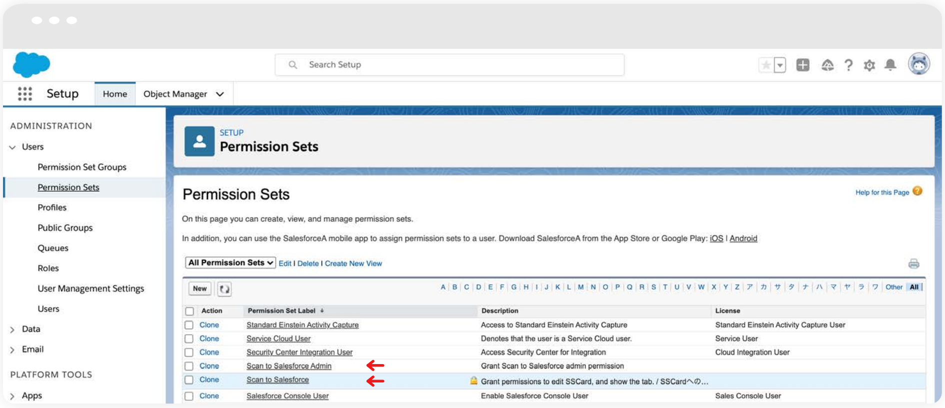
1-3. Assigning permission sets

To upload scanned business cards to Salesforce, you need to grant users SS card editing permission. You can do this by assigning permission sets.

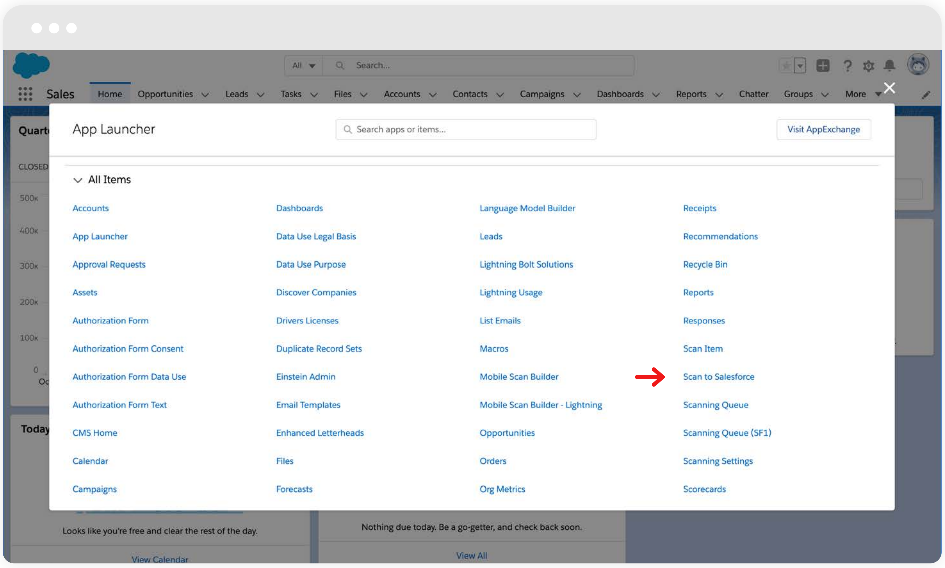
• **Scan to Salesforce:** Assign to all app users
• **Scan to Salesforce Admin:** Assign to users who will use Admin settings

Go to Setup > Administration > Users > Permission Sets and find Scan to Salesforce or Scan to Salesforce Admin. Choose Manage Assignments to assign the permission sets and then select the relevant users.



1-4. Finding the Scan to Salesforce tab

Open App Launcher and make sure the app is displayed.



If it's not displayed, review 4-1. Scan to Salesforce tab isn't in Salesforce App Launcher to complete the settings.

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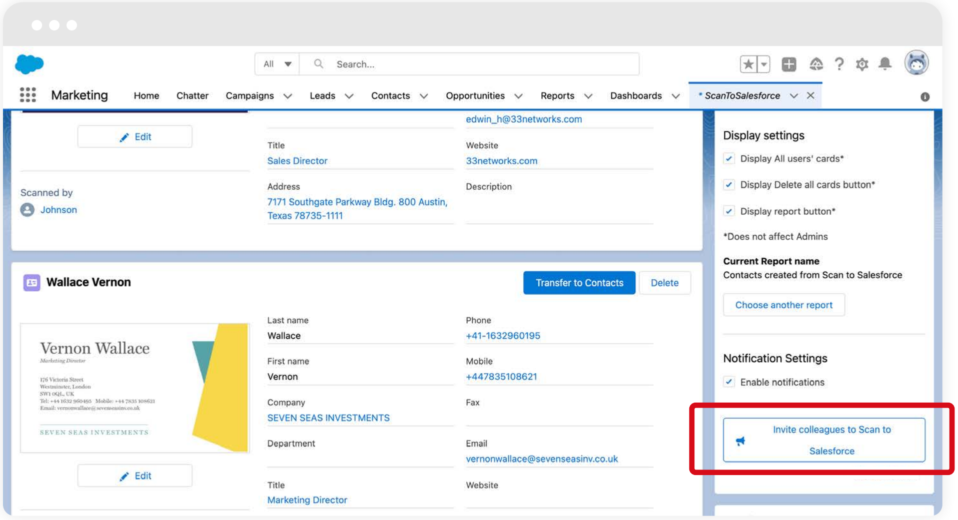
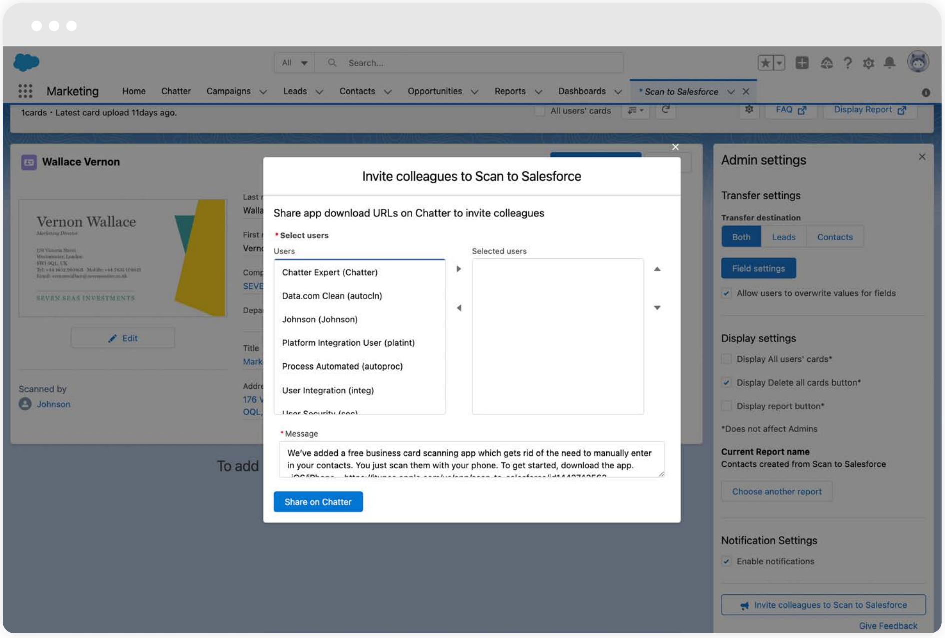
1-5. Sending a mobile app invitation to colleagues

Go to the Scan to Salesforce tab > gear icon > Invite colleagues to Scan to Salesforce. Select users to invite and edit the message if needed. Then click Share on Chatter.





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2. Using the App

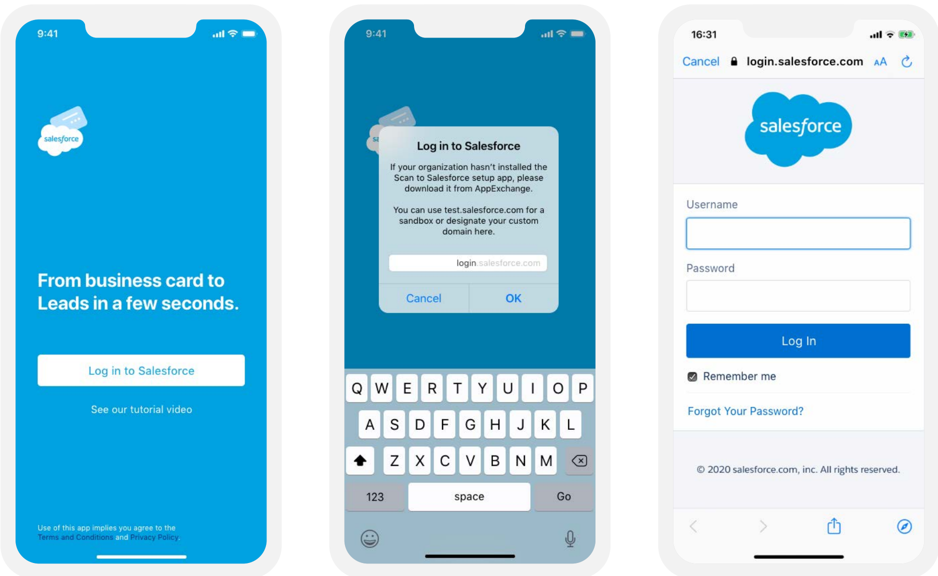
2-1. Installation

Check the mobile app invitation in Salesforce Chatter and install the iOS app from the App Store and the Android app from Google Play.

Download on the App Store   GET IT ON Google Play

2-2. Connect with Salesforce

You'll need to log into your Salesforce account when you use the app for the first time.
* *To test it in the sandbox first, enter test.salesforce.com.*
** *For a custom domain, use [your domain].my.salesforce.com.*



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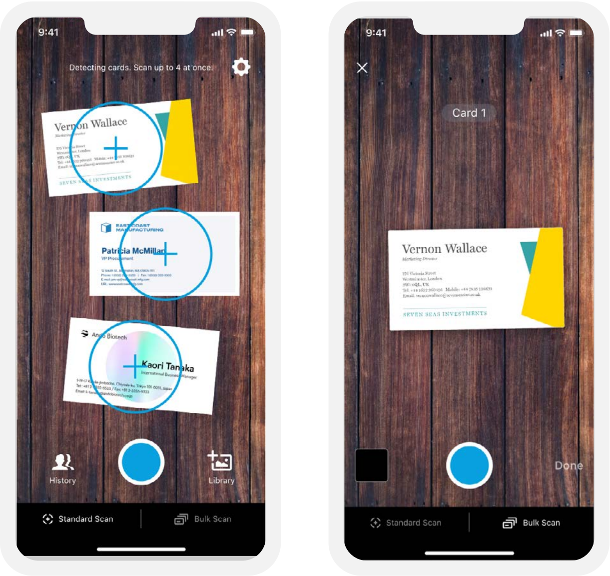
2-3. Scanning and uploading

Step 1:

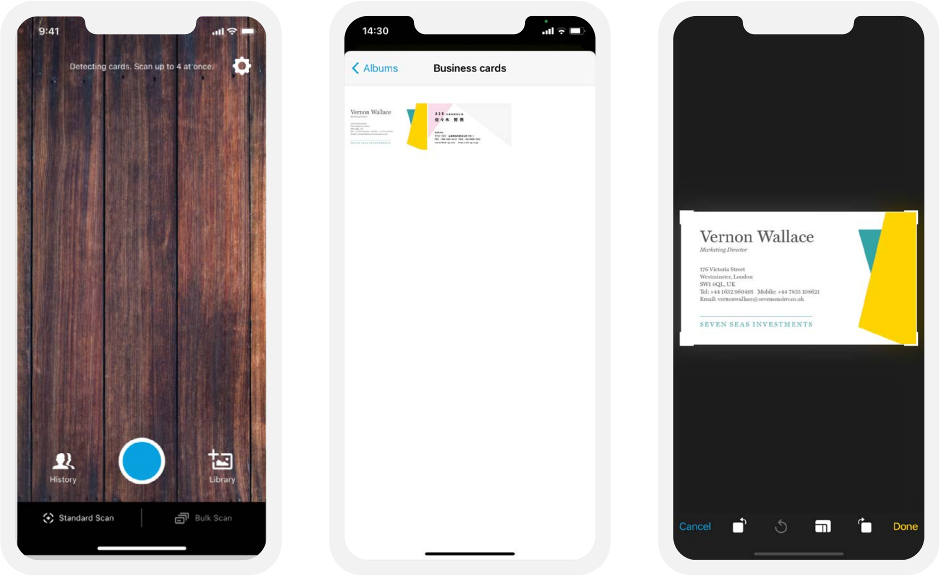
Business cards

Standard Scan:
Standard Scan mode lets you digitize up to 4 cards in one shot. Place the cards on a flat surface with a solid background. Then tap the shutter button when you see a blue circle at the center of each card.

Bulk Scan:
Tap Bulk Scan in the bottom right corner to scan multiple cards continuously. Tap Done to start digitizing them.



Saved business card images/photos
Tap Library in the bottom right corner and then select the image of the card you want to scan. Align the card within the borders. Tap Done to start digitizing.



**The card language is automatically identified, or you can manually select the scanning/OCR language in the app settings.*

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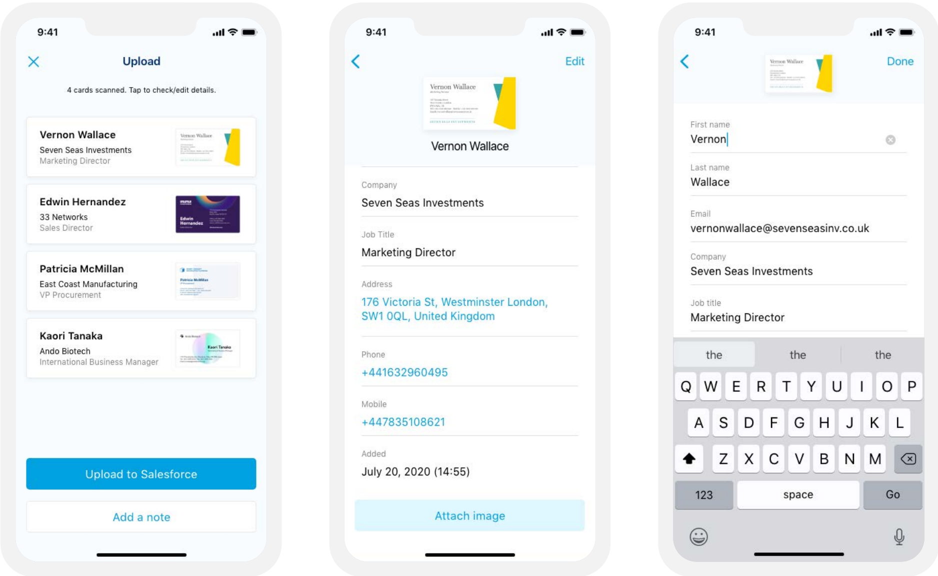
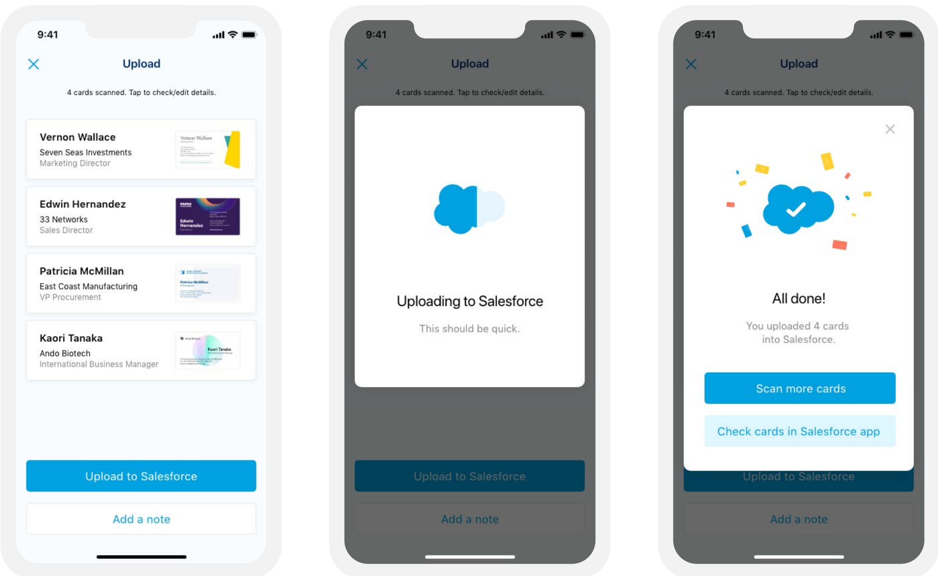
Step 2: Tap on a card to manually edit any of the digitized data. You can also attach an image file of the reverse side of a card using Attach Image.



** On the editing screen, you can pinch and zoom to magnify the card image.*
*** To validate addresses and split them into applicable fields (street, city, etc.), turn on the address validation in the Settings screen in the mobile app.*
**** To abbreviate state names, turn on that function in the Settings screen in the mobile app.*

Step 3: Tap Upload to Salesforce to transfer the card data.



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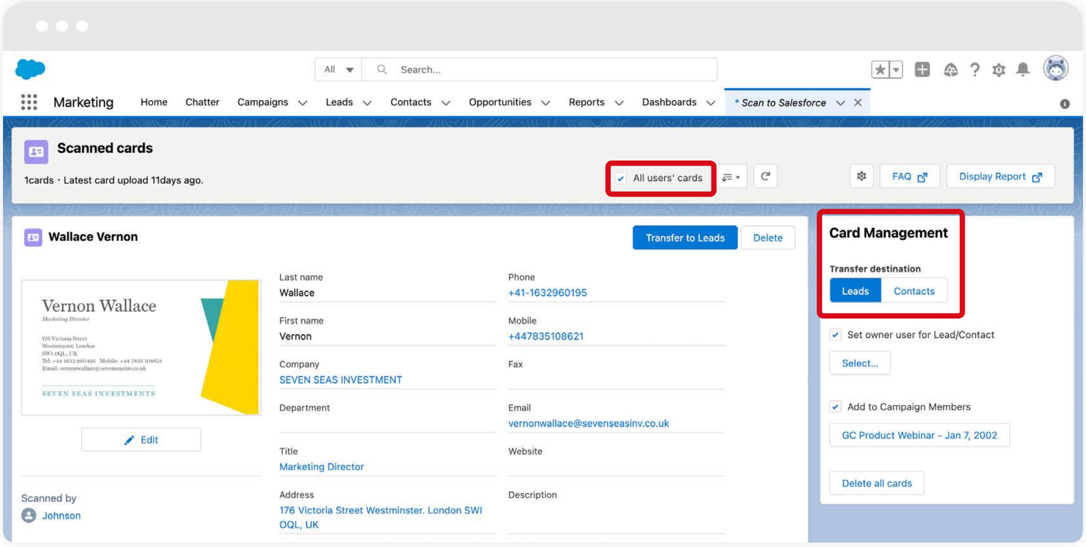
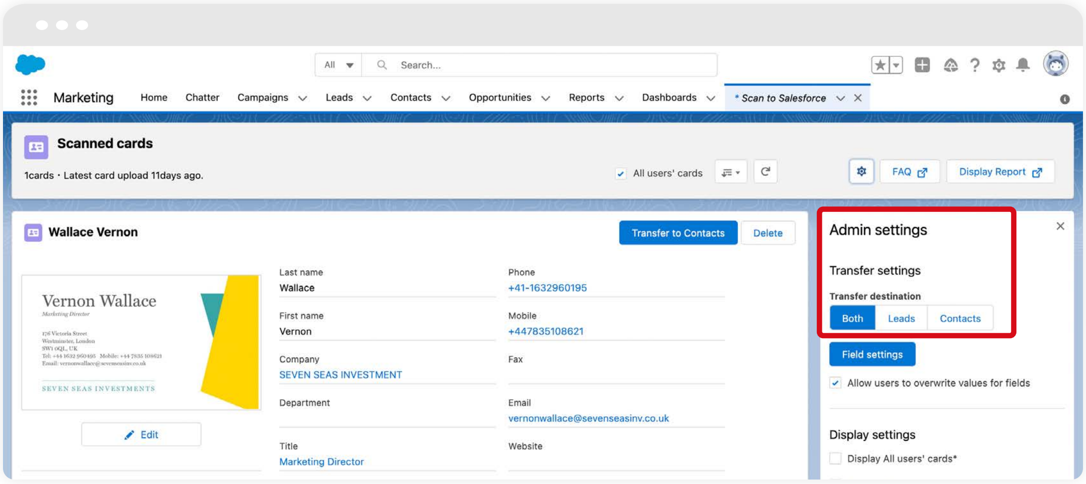
2-4. Transfer business cards to Leads/Contacts

Uploaded contacts are shown in the Scan to Salesforce tab. Click Transfer cards to Leads or Transfer all cards to Leads to confirm the details and transfer your cards.





** The cards you uploaded are shown by default. Check All users' cards to see cards uploaded by others in your Org.*

*** Select Contacts from Card Management > Transfer destination if you'd like to change the destination.*

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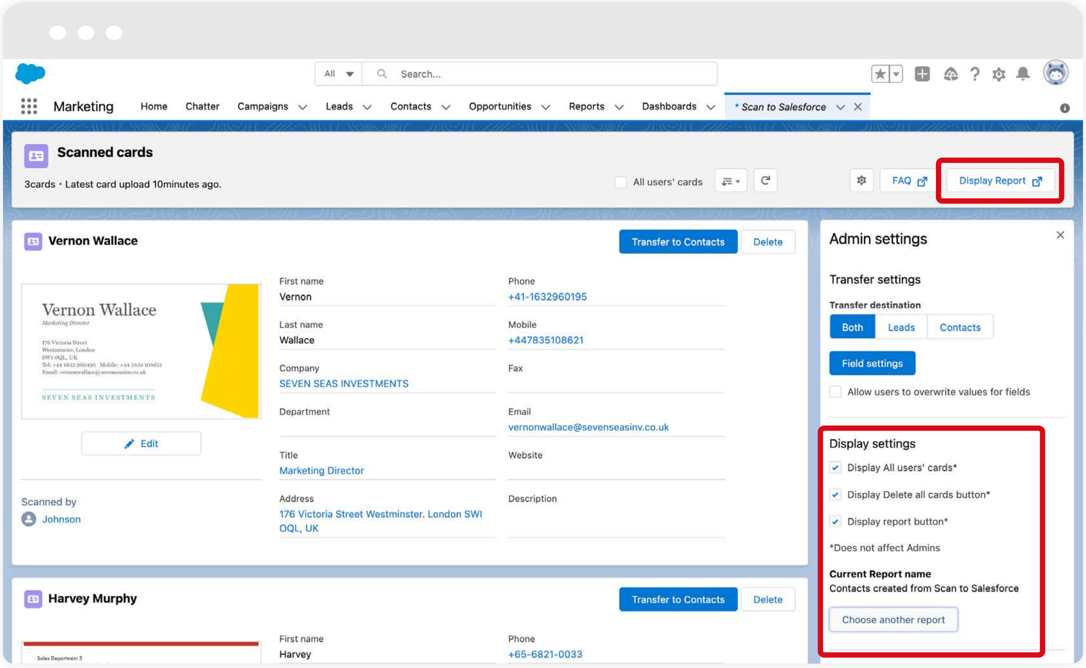
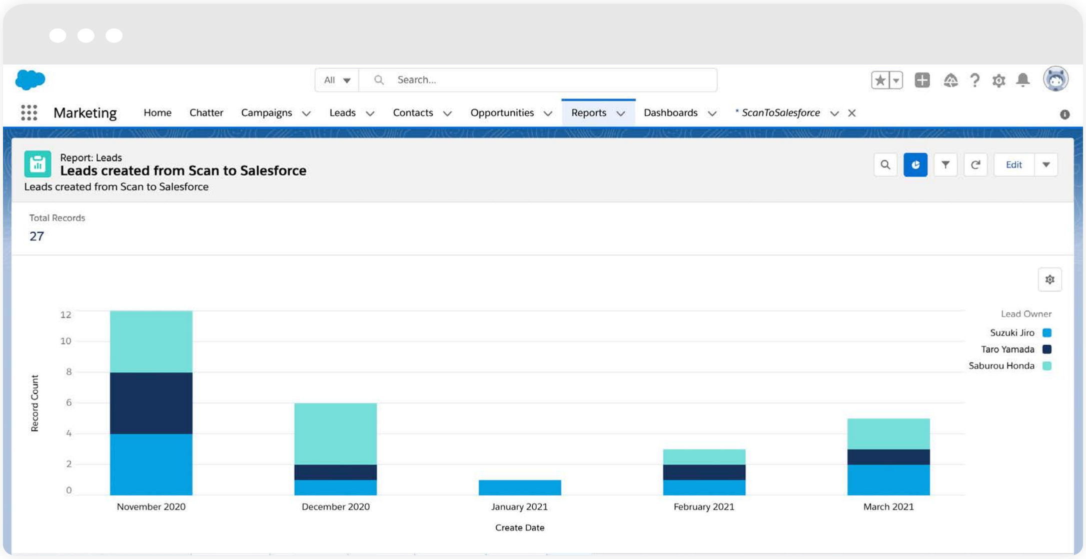
2-5. Check business card data transfered to Leads and Contacts

Go to the Scan to Salesforce tab > gear icon> Admin Settings, and find Display settings. From Choose another report, select the report template you want to display.

Then, click the Display Report button in the top right of the Scan to Salesforce desktop app.





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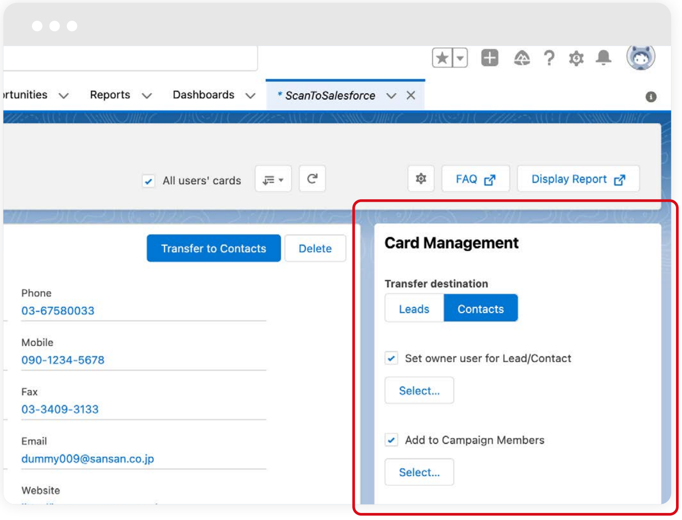
3. Other Features



3-1. Transfer Option Settings

From Card Management, select transfer options from among Lead or Contact, Owner, and Campaign Members.

** The uploader is the default owner unless a specific owner is assigned by checking Set owner user for Lead/Contact.*

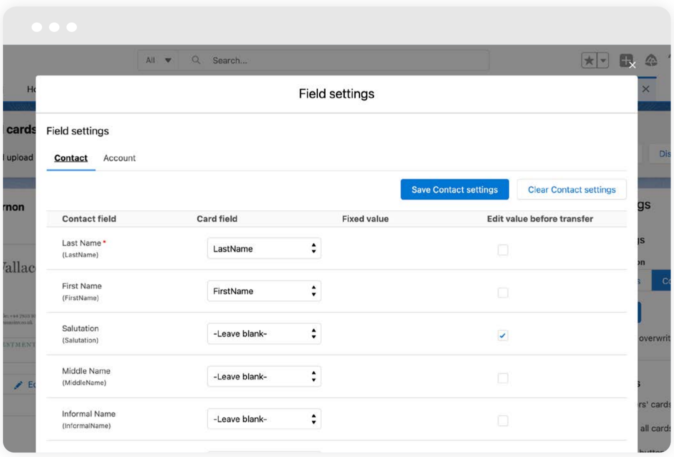
3-2. Field Settings

**Please note you need an admin account to do this.*

Step 1. Assign permission sets
To start Field settings, complete the permission sets settings by assigning the applicable permission set:
• **Scan to Salesforce:** Assign to all app users
• **Scan to Salesforce Admin:** Assign to users who will use Admin settings

Go to Setup > Administration > Users > Permission Sets and find Scan to Salesforce or Scan to Salesforce Admin. Assign the permission sets by clicking Manage Assignments and then choosing the relevant users.

Step 2. Field Settings
In Field settings, you can set how business card data should be transferred to each field for Leads, Contacts, and Accounts. Click Field settings and set the transfer options for each field by following one of the transfer options displayed.



• **-Leave Blank- :** No value will be entered.
• **-Fixed Value- :** Set a fixed value that will be applied to all business card data.
• **Card field:** Reflect the value of the selected business card data item.

** -Leave Blank- cannot be chosen if the field is required.*
*** You cannot select business card data of a type that does not match with the field.*

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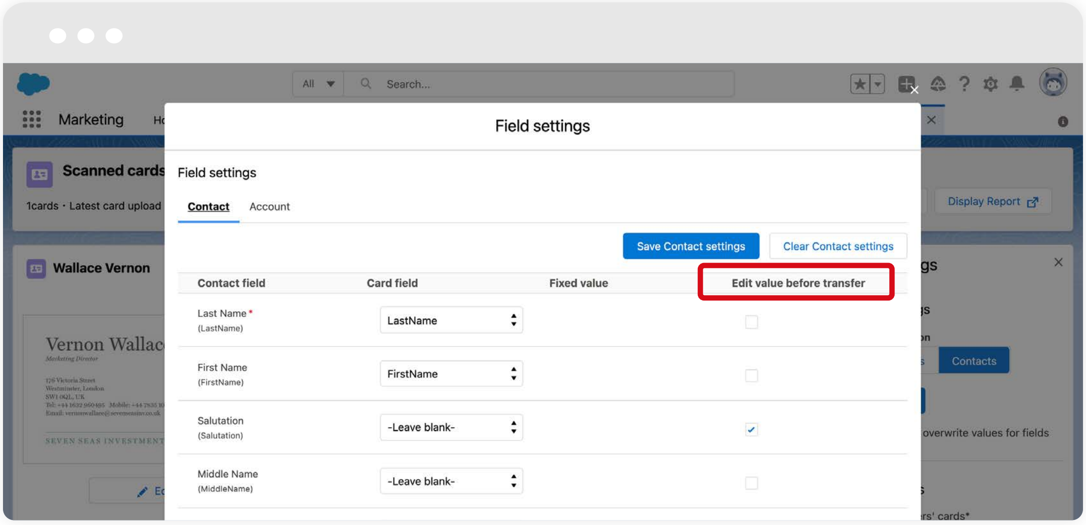
Step 3. Enable users to overwrite values for fields

Go to the Scan to Salesforce tab > gear icon > Admin settings and use Allow users to overwrite values for fields to let users edit the fields for each business card's data.

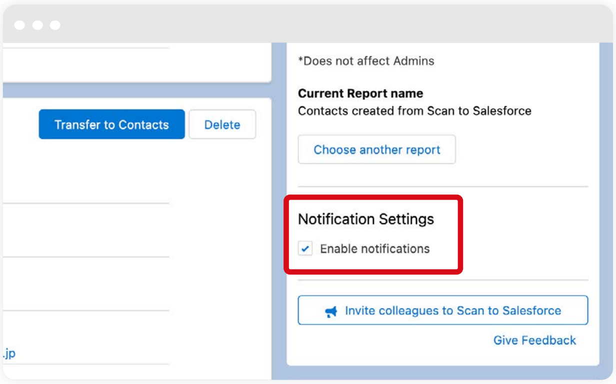
You can check Edit value before transfer in the Field settings to change the display settings for each field.

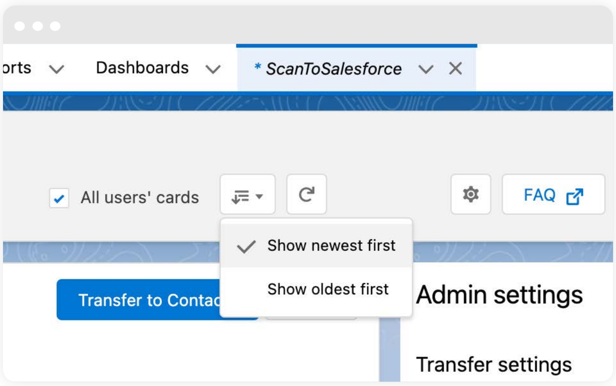


3-3. App Activity Notification Settings

With the notification function turned on, the Salesforce app will regularly notify you about the app's activities.

To disable this function, go to the Scan to Salesforce tab > gear icon > open Admin Settings and find Notification Settings. Uncheck Enable notifications.





3-4. Select card order, update page

When settings are complete, click the page update button from the upper right corner of Scan to the Salesforce tab.

You can also click the sort button to select card orders from Show newest first / Show oldest first.

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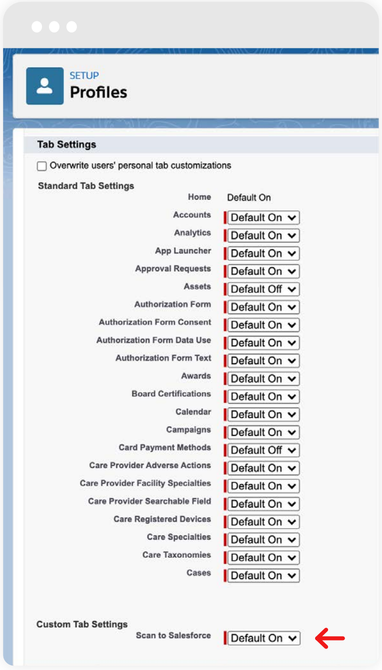
4. Troubleshooting

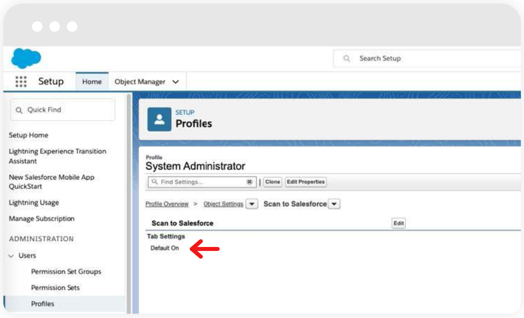
4-1. Scan to Salesforce tab isn't in Salesforce App Launcher

To show the ScanToSalesforce tab and start using Scan to Saleaforce, you need to complete custom domain settings and permission sets settings. See 1-2 and 1-3 for more information.



If the custom tabs are not displayed after assigning the permission set, you can set the custom tab display settings in the Salesforce user profile.

Go to Setup > Administration > Users > Profiles > select the User Profile > find Scan to Salesforce in the Custom Tab Settings and select Default On.



4-2. Can't upload to Salesforce

To upload scanned business cards to Salesforce, you need to grant users SS card editing permission. You can do this by assigning permission sets.

See 1-3 for more info.

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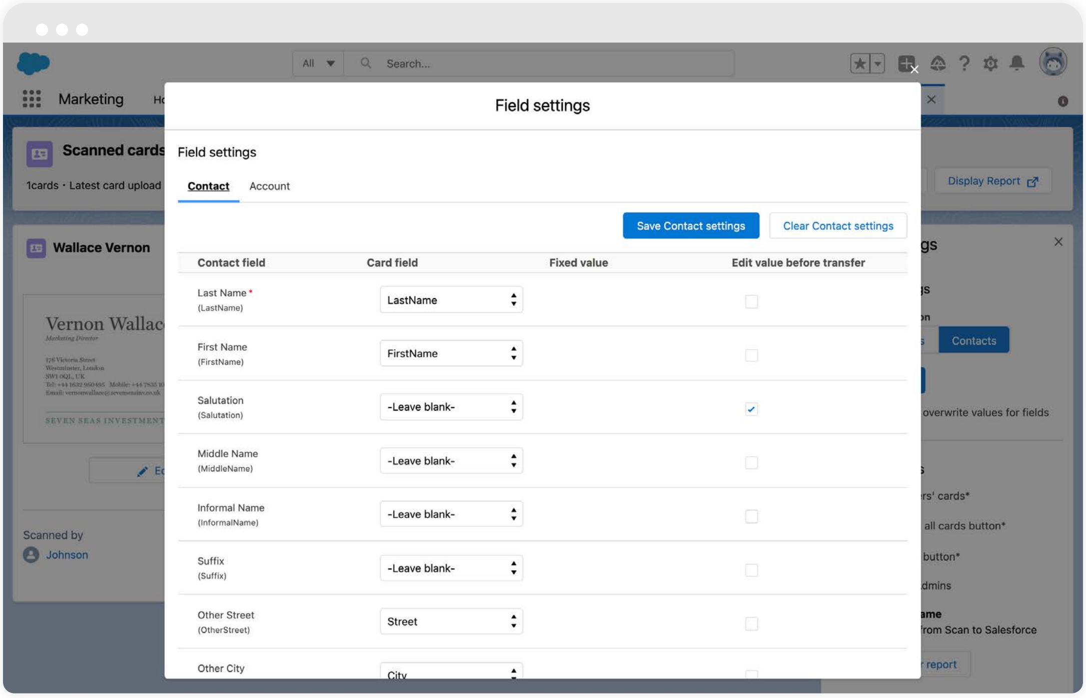
4-3. Transfer cards to Leads or Contacts doesn't work

Note that it may not be possible to upload business card data to Leads and Contacts if your organization has requirements for custom Lead or Contact fields.

Go to Field settings and enter Fixed values for fields or choose a card field to transfer business card data values to fields.



** An admin can choose Allow users to overwrite values for fields from Transfer settings.*
*** When you complete Field settings, you need to assign permission sets. See 3-2 for more info.*

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5. Error codes

Error code	Issue	Solution
Wrong domain; please designate correct Salesforce domain	Salesforce domain you designated doesn't exist	Disconnect Salesforce account and re-connect with correct domain (see 4-1)
Failed to obtain a token; please check the user guide	Failed to obtain access token from Salesforce	Review Salesforce permission (see 4-2)
Please check that the companion app is installed on Salesforce	Salesforce app is not installed	Install Salesforce app from AppExchange (see 1-1)
Timeout	OCR server didn't respond in certain period	Please scan business card again after a while
400: required fields are missing - [xxx]	Contact data uploaded to Salesforce is missing a field	Check if the contact data has all required fields
401: unauthorized - Session expired or invalid	Salesforce session ID or token is expired	Review Salesforce permission (see 4-2)
404: not found - Invalid cross reference id	Salesforce is rejecting duplicated contact data	Scan business card again and upload it
404: not found - Entity is deleted	Salesforce is rejecting duplicated contact data	Scan business card again and upload it

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6. Support

If you wish to receive a support, please contact us at:

Website: www.scantosalesforce.com
Contact form: www.scantosalesforce.zendesk.com/hc/en-us/requests/new

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