

SCAN, IMPORT, AND AUTOMATICALLY FILE DOCUMENTS TO SALESFORCE®

Introduction



A brief introduction to

Scanning to Salesforce® with ccScan®

a popular document scanning application for an ever-expanding list of repositories and content management systems in the Cloud

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What are Salesforce and ccScan?



- What is Salesforce®?
 - Salesforce.com is the enterprise cloud computing company which is known primarily for three things: the Sales Cloud and the Service Cloud, their applications for sales and customer service (also known as customer relationship management or CRM); Force.com, their cloud platform for building and running business applications; and Chatter, their enterprise collaboration application.
 - Salesforce makes it simple for businesses to share, manage and access all their content online.
- What is ccScan®?
 - A production-quality capture application used to scan paper documents and import PDF documents directly to Salesforce Attachments, Salesforce Content, Salesforce Chatter, and Salesforce Documents in an automated, time-saving manner.



Typical Scenario

- Typically people that scan documents to Salesforce Attachments, Salesforce Content, Salesforce Chatter, or Salesforce Documents
 - First scan to their PC, then use the browser to create a folder in Salesforce Documents and upload their document(s)
 - Next they use the browser to set Salesforce document properties such as title, description, and keywords, or enter values in the custom fields defined for the Library in Salesforce Content
 - Obviously this approach takes a lot more time than necessary
 - The next slide shows how ccScan can eliminate this wasted time

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Optimized Scenario



- Is there a better way to scan to Salesforce Attachments, Salesforce Content, Salesforce Documents, and Salesforce Chatter?
 - YES, absolutely!
- Scan Directly to the Salesforce with ccScan Standard
 - Eliminate time-consuming intermediate steps
 - Set Salesforce document properties or custom input fields at scanning time
 - Create attachments (or links to documents stored in Salesforce Content) in the *Notes & Attachments* section of standard Salesforce records (Account, Asset, Campaign, Case, Contact, Contract, Event, Lead, Opportunity, Product, Solution, Task) or any Custom records
 - Automated the process with ccScan Advanced

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ccScan Screenshot



ccScan

File View Scanner Jobs Page Admin Help

Fit Image 15%

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Available Jobs

Description	Action	Repository
Scan Kiosk to Salesforce Content	Scan	Salesforce® Co...
Scan to Salesforce Content	Scan	Salesforce® Co...

Available Jobs Index/QA Jobs Views

Scan to Salesforce Content

Field Name Value

Export

Library: Publications

Title: ccScan White Paper

Description: Explains how ccScan works with Salesforce; contains lots of

Tags: ccScan, scan to the cloud, bulk import to the cloud

Upload Documents: Always Create New

Retail Price: \$299

Order Quantity: 1

Index/QA Later: ☐ Enabled

Scanning

Document Format: PDF

JPEG Quality: Good

Pixel Color: Color

Paper Size: Scanner Setting

Resolution: 300

Validate Start Scan Cancel

Document Count: 1 Pages Current Document: 1 Total Pages Processed: 1

Scn Imp Ocr Exp

ccScan White Paper

Configure New Scanning Job

In the form below the Administrator can configure the new Scanning job. The same form is used to make modifications to the job later. First, the destination library in Salesforce Content is selected. The title and description of the newly scanned document are entered in Title and Description. To allow for automated naming, ccScan supports the use of "tokens" in document names that automatically insert content and barcode values. Automated naming is used with high-capacity scanners whose hoppers can hold large stacks of documents separated by barcode sheets.

Log

Date/Time	Action	Job Description
9/5/2011 10:43:04 AM	ExportJob	Scan to Salesforce Co
9/5/2011 10:44:44 AM	ExportDoc	Scan to Salesforce Co
9/5/2011 10:44:44 AM	ExportJob	Scan to Salesforce Co
9/5/2011 10:45:09 AM	ExportDoc	Scan to Salesforce Co
9/5/2011 10:45:09 AM	ExportJob	Scan to Salesforce Co

SCAN, IMPORT, AND AUTOMATICALLY FILE DOCUMENTS TO SALESFORCE® One-Step Process



- Eliminate Time-Consuming Intermediate Steps
 - Stop scanning documents to your PC first
 - Stop creating folders in Salesforce Documents manually
 - Stop uploading scanned documents to Salesforce manually
 - Stop setting Salesforce document properties or entering input fields afterwards
- Instead do all of the above in a single step
 - Select a scanning job in ccScan
 - Enter document title, description, tags, and Salesforce Content custom input fields...
 - Start job
 - Done!

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Salesforce Properties and Custom Input Fields



- Supported Salesforce Attachment properties
 - Document Name, Description, Private
- Supported Salesforce Content properties
 - Library Name, Document Title, Description, Tags, Upload Documents Method (Always Create New, Update Existing, Error If Conflict), and all Custom Input Fields contained in the default Content Type of the Library
- Supported Salesforce Documents properties
 - Folder name, Document Name, Description, Keywords, Internal Use Only, Externally Available, Upload Documents Method (Always Create New, Update Existing, Error If Conflict)

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Automate with ccScan Advanced



- Separate a stack of multi-page documents automatically with barcodes
- Automatically name documents, automatically lookup, update, or create Standard and Custom records, and automatically set fields in records using values
 - Extracted from one or more barcodes
 - Obtained with text pattern searches in text retrieved with OCR
 - Computed from running counters
- Barcode values, text search results, and counters are made available in “macros” which can be combined with static text to form complex expressions
- Use multiple barcodes and text pattern searches in combination with “conditional macros” to test for different document types and apply rule-based processing
- Automation works equally well with scanned paper documents and imported PDFs

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ccScan Advanced Sample Scenarios



- Scan paper invoices and attached them to custom Purchase Order records with automated SOQL lookup based on an automatically extracted PO Number; the PO Number is found with a text pattern search defined with a Regular Expression in the text extracted from the invoice with OCR at scan time
- Attach incoming electronic faxes in PDF format to Salesforce Account records based on a barcode in the cover sheet; fully automatic operation running unattended periodically polling folders for incoming faxes
- Scan documents and automatically populate custom fields in Content Libraries based on barcode values or text values found with Regular Expression-based pattern searches in OCR'd text
- Use ccScan in a wide range of business processes where opportunities for automation and large time savings are present

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Additional Features



- Bulk import capability to upload large amounts of files at once
- Pre-configured set of import and scanning jobs can be customized
 - Create new jobs and/or modify existing jobs
 - Select the properties the operator should enter and the default values
- Use optional Index/QA step
 - As “error queue” to manually forward documents not processed by automation
 - To review scan results, insert and delete pages
 - To enter values into document properties
 - To redact and annotate documents before storing them
- Share a high-throughput scanner in "kiosk" environment with automatic logout
- Daily audit log in script-language friendly format

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Next Step



To learn more about ccScan for Salesforce or download a free trial please visit

<http://www.capturecomponents.com/products/ccScanForSalesforce.html>

or email Capture Components LLC at

sales@capturecomponents.com