Getting Started with SCAN210 for Salesforce

Overview

Scan210 for Salesforce is a fast, easy, and accurate way to enter contacts into Salesforce.com. It maximizes your efficiency with such features as:

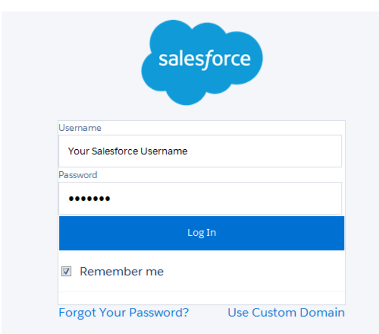
- Creating records simply by dragging and dropping data from email, web sites, documents, and vCards directly into the Scan210 window.
- Capturing records by scanning business cards and importing existing Scan210 files and text files.
- Adding other data that may be required to create leads, contacts, and accounts/companies.
- Associating contacts with existing accounts/companies, as well as creating new accounts/companies.
- Verifying data accuracy and completeness, by preventing duplicate entries when you transfer Scan210 records to SalesForce.com.

Activate your copy of Scan210 for Salesforce

You can activate Scan210 for SalesForce through the Internet. Although you can choose not to activate now, you must activate Scan210 for SalesForce within the 30-day evaluation period. For licensing information please contact our service Centre at 1 888 683 3099 or support@scan210.com . Scan210 works with all version of Salesforce.com

Starting Scan210 for Salesforce for the first time

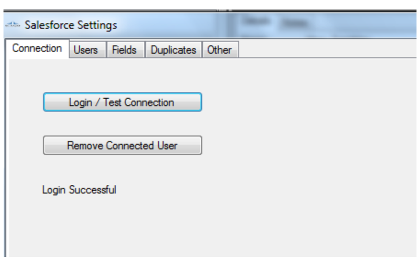
The first time you start Scan210 for Salesforce, you will be prompted to enter your Salesforce.com Username and Password. Scan210 uses OAUTH for user authentication which appears as follows:



Enter your Salesforce username in the Username box and your Salesforce Password in the Password box. This is the same Username and Password that you would use to log into Salesforce using your web browser.

You will then see the following "Allow Access" screen. Select "Allow" to complete the login sequence.

Once you have successfully logged in you will see this Salesforce Settings screen and the message "Login Successful".



If your login was not successful, make sure you have entered your Salesforce username and password correctly. If your company users proxy servers or Single Sign on, you will have to set some additional Scan210 settings described in the Advanced Login Settings section of this guide.

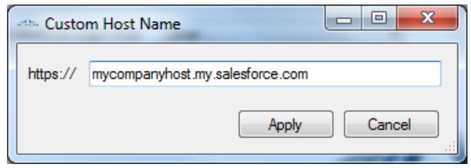
Advanced Login Setting

Scan210 has advanced login in features that can be found under the Salesforce Login Host setting and the "Use a proxy server for API Calls" Advanced Setting.

Salesforce Login Host

Use the Salesforce Login Host setting to access your Salesforce Sandbox instance when required during initial evaluation and/or testing of Scan210. When you select test.salesforce.com Scan210 will connect to your Sandbox Org. Make sure you use your Sandbox userid and password when connecting Scan210 to your Sandbox org.

If your company uses single sign on, then enter in your companies single sign on URL in the “Login Host” setting by selecting “Other”. Check with your company’s IT team to find out what your Single Sign On Host Name is. It might look something like “mycompanyhost.my.salesforce.com”. You would place this value in the login host box that appears when you select “Other”.



Proxy Server Settings

If your company uses a proxy server for internet access, you will have to check the “Use a proxy server for API calls” check box in the top right corner. Selecting this box works in most cases as it allows Scan210 to automatically detect your company’s proxy settings.

You can access the Advanced settings for proxy servers by clicking on the Advanced button. Please check with your IT Support team to determine if you need to use any of these advanced settings for your companys proxy server.

Creating Scan210 Records

Scan210 for Salesforce lets you create records quickly by using these timesaving techniques:

- Scan business cards using the Scan210 Business Card Scanner
- Using drag-and-drop to insert data from other sources

The following sections briefly describe all three methods:

Using Drag-and-Drop

You can insert data from email, web sites, documents, and vCards into Scan210 for Salesforce by dragging the data into the Scan210 interface.

Drag and Drop Instructions

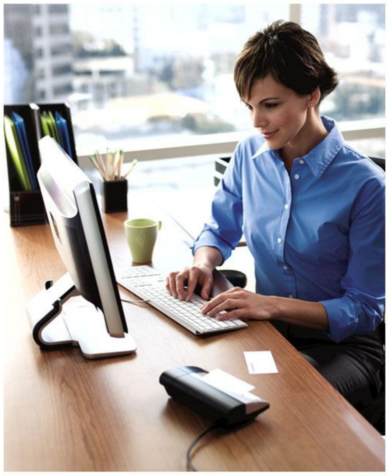
1. Highlight the signature line of an email or the text from a document containing the contact information using your mouse.
2. LEFT CLICK on the highlighted text (avoid any hyperlinks), continue to hold down the left mouse button and drag the text into the Scan210 application.
3. If you can't see the Scan210 Application because the email is covering it up, then drag your mouse down to the Scan210 icon at the bottom of your screen and it will open in front of the email.
4. Continue dragging the highlighted text to the left column in Scan210 and release
5. The information will populate into the correct fields in Scan210.
6. Now you can review the content, add any missing data like account name and transfer the record to Salesforce.

Scanning Business Cards

To scan a business card

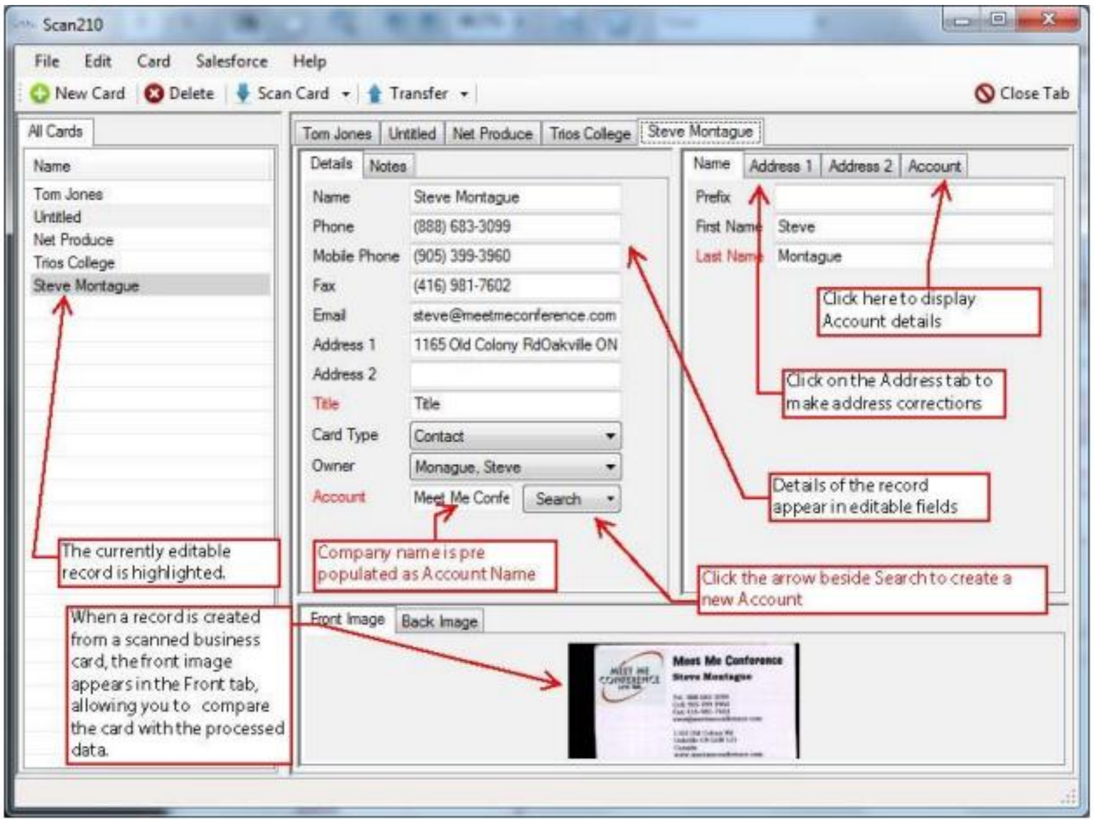
1. Insert the card FACE UP into the scanner. The scanner will pull the card through and the contents will display in the Card Detail window.
2. In the Edit view, review the processed data for accuracy. The scanning technology is extremely advanced, but it may be unable to interpret certain logos, graphics, and fonts.

   Note: You can scan multiple cards before reviewing and processing.



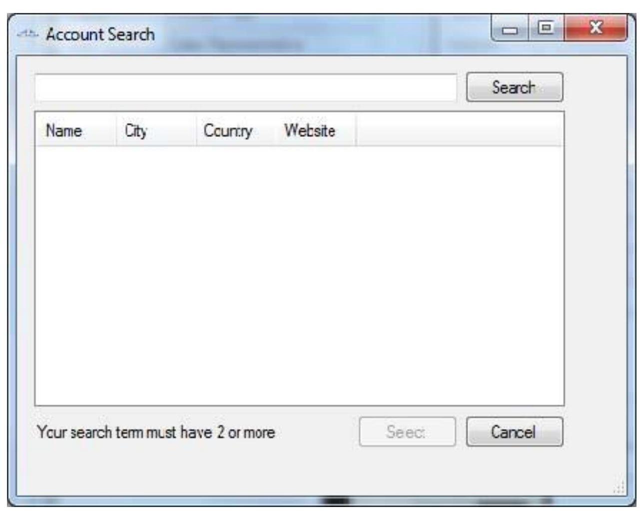
Card Details Window

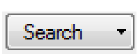
The scanned business cards will appear in the Scan210 card details window. Use this window to verify that the information was accurately scanned into the correct contact or lead fields and to make any corrections that are necessary. It's a best practice to verify and transfer one card at a time until you get more familiar with the Scan210 interface.



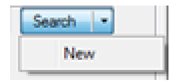
Use this screen to make any adjustments to the data that was scanned from the business card and placed into the various contact fields. To make corrections to the address, click on the Address 1 tab and make your edits to the fields displayed on in this windows. In order to transfer the contact you must have data in the contact Name, Title Account.

Account Search

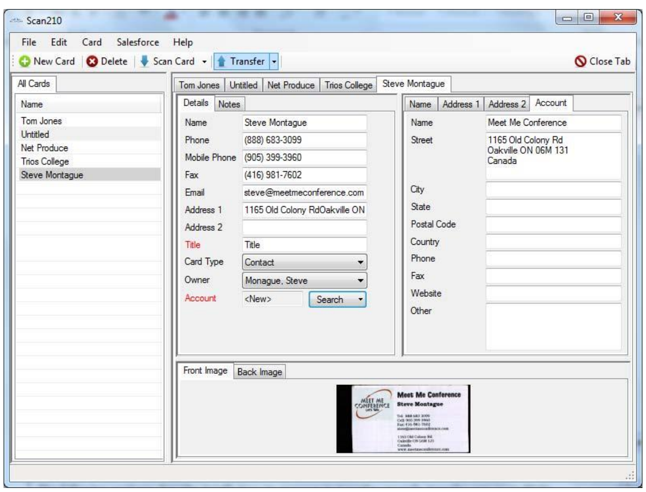


When you select the  button you will be taken to the Account Search window. In this window you can type a partial account name (minimum two characters) and the wildcard search character "*" and hit the enter key or click the Search button. The resulting account look up will be populated in the window. Highlight the account you want the contact to be associated with and click Select. The selected account will now be populated in the details window.

Adding a new Account



Scan210 allows you to add a new account by clicking on the arrow next to the Account Search button in the details window. When you click on New Scan210 will open the Account tab and populate the current business card contact details into the fields in the Account tab. The Account Name is pre-populated with the Company Name from the business card. Review the details and make any necessary adjustments. When you are satisfied that all the Account fields have been populated and the Contact record is complete you can click on Transfer and Scan210 will create the Account record in SalesForce.com as well as transfer and associate the contact with the new account.

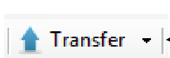


Transferring Scan210 Records to Salesforce.com

After you have verified the contents of the Scan210, transferring records from Scan210 into Salesforce is easy and flexible. The following sections describe briefly how to prepare to transfer records, transfer one or multiple records, and respond to special circumstances.

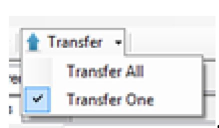
Specifying Transfer Settings

To specify transfer settings as Transfer One or Transfer All click on the small arrow on the



button in the Scan210 ribbon.

From here you can select Transfer All or Transfer One



. The checkbox indicates the current selection. If you select Transfer All, when you push the Transfer button all Business Card records in Scan210 will be transferred to Salesforce.com. When you select Transfer One, only one record at a time will transfer to Salesforce. It's a best practice to verify and transfer one card at a time until you get more familiar with the Scan210 interface.

Specifying Transfer Settings

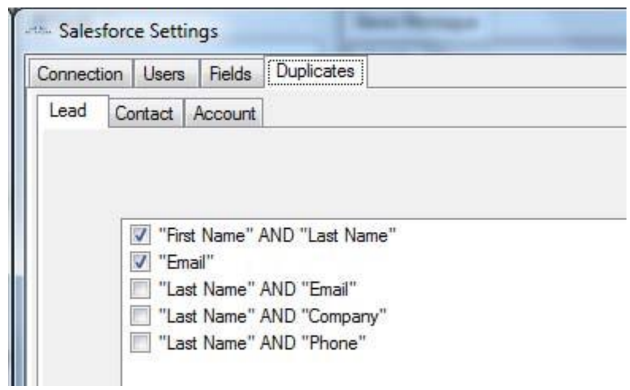
During the transfer process, Scan210 for Salesforce may notify you about either or both of the following situations:

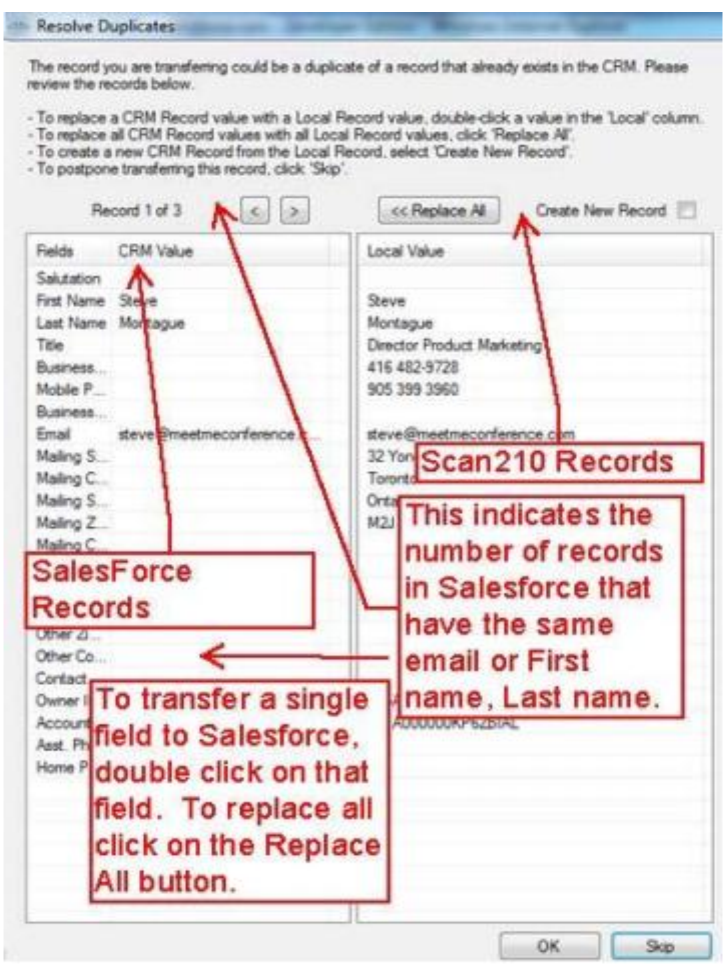
- Information required by your Salesforce database is missing.
- Information not supported in your Salesforce database is present.

Based on how your administrator has customized Scan210 for Salesforce, the message you see describes your options for proceeding.

Checking for Duplicates

Scan210 will by default check for duplicates. If your organization has a specific policy for checking duplicates this feature can be disabled using the Scan210 custom options (see next section). You can specify how you want Scan 210 to check for duplicates. The default is First Name and Last Name or Email Address. To modify these settings, select SALESFORCE -> Settings -> Duplicates. Select or deselect the options you want by clicking on the check boxes





When you attempt to transfer the record to SalesForce Scan210 will check if there are any duplicate Account records and Contact records. If a potential duplicate is found, Scan210 will display a Resolve Duplicates window where you will be able to verify the duplicate records. The Resolve Duplicates window will show the SalesForce records on the left and the Scan210 records on the right. If more than one SalesForce record is found you will see Record 1 of 3 displayed. You should click the arrow to view all records and determine how you want to resolve the potential duplicate.

Using Custom Options

Your Scan210 for Salesforce administrator establishes the parameters that are available when you create Scan210 for Salesforce records and transfer them to Salesforce.com. These parameters are:

- The fields available in Scan210 for Salesforce for each record
- How the fields map to the fields in your Salesforce.com database
- The user names that can be assigned as a record owner
- The fields required for a record to be transferred
- The fields that are compared when the transfer process checks for duplicates

The following section is geared to system administrators. To request changes to these settings, contact your administrator.

Administrator Functions

The Administrator portion of SCAN210 allows you the capability of providing additional functionality and setting rules. Scan210 uses XML files and .INI files to manage the custom fields and administrative policies that are available to the end user. An administrator can modify these files and then distribute them to end users to achieve a consistent deployment across all users. This eliminates the need to manually configure each client installation.

The XML Files are used to set the following:

- Custom Field Values – The Custom Field definitions, mapping and default values (CustomFields.xml)
- Salesforce.com Field Maps –
- Users –

CustomFields.xml SfdcFieldMaps.xml SfdcUsers

The XML files are located in C:\Users\%user%\AppData\Local\Scan210\Config

The .INI file is used to set the following:

- Show or hide the ability to map SCAN210 fields with SalesForce.com Fields. This includes Contact, Lead and Account Field Mapping and Required Field Settings.

The Scan210.ini file is located in C:\Program Files(x86)\Scan210

The following is the default layout of the Scan210.ini file. The controls are inactive because they have the comment character "#" in front of them. To activate these controls, simply remove the "#".

```
[Common]

#AccountSearchLayout=Name,City1,Country1,WebSite
[Logging]
#CurrentLoggingLevel=DEBUG
[SFDC]
#Url=https://test.salesforce.com/services/Soap/u/23.0
#DefaultCardType=Contact
#TransferImagesForContacts=True
#AllowAccountUpdate=True
#AllowAccountInsert=True
#SavePassword=True
[Policy]
#HiddenSettings=SfdcSettings:Fields
#ReadOnlyFields=Account:*
#HiddenFields=Address2
#HiddenFieldValues=SfdcObjectType:Lead
```

Scan210 Custom Settings

The following table describes the various Scan210.ini file settings:

.INI Setting	Description	Example
Show/Hide Admin Functions	Used to determine if the user has access to map custom fields. HiddenSettings=SfdcSettings:<name>,SfdcSettings;<name> NAME can be “Users”, “Fields”,	HiddenSettings=SfdcSettings:Duplicates,SfdcSettings:Fields,SfdcSettings:Other HiddenPicklistValues=Card:SfdcObjectType:Contact This will hide the settings for Duplicates, Custom Fields and Other along with preventing the user from switching between Lead and Contact
Set a different Salesforce.com URL	Used to connect Scan210 to the SalesForce.com sandbox.	Url=https://test.salesforce.com/services/Soap/u/23.0 Default = https://login.salesforce.com/services/Soap/u/23.0
AutoScan	Tells the scanner to feed the card as soon as its placed into the scanner	AutoScan=True AutoScan=False Default = True
TransferAll	Controls if all cards are to be transferred when the user clicks the transfer button.	TransferAll=False or TransferAll=True Default = True
AccountSearchLayout	Determines the order of the fields shown in the Account Look Up	AccountSearchLayout=Name,City1,Country1,WebSite

	window.	Default = Name,City1,Country1,WebSite
DefaultCardType	Sets the default card type to Contact or Lead	DefaultCardType=Contact or DefaultCardType=Lead Default = Contact
Password Save	Determines if the user password is to be saved	SavePassword=True or SavePassword=False Default = True
Card Image	Controls if the card image is to be	TransferImagesForContacts=True or
Transfer	transferred to SalesForce.com	TransferImagesForContacts=False Default = True
Account Updates	Controls if the user is allowed to modify account settings	AllowAccountUpdate=False or AllowAccountUpdate=True Default = True
Account Additions	Controls if the user is allowed to create new accounts	AllowAccountInsert=False or AllowAccountInsert=True Default = True
Hide User Interface Fields	Used to hide unused fields in the Card Details user interface. The fields that can be hidden with this command are: Card:Address1 Card:Address2 Card:Account	HiddenFields=Card:Address2 Default = not set
Picklist Values	Used to hide picklist values from being selected. The following can be hidden: Card:SfdcObjectType:Lead Card:SfdcObjectType:Contact	HiddenPicklistValues=Card:SfdcObjectTyp e:Lead Default = not set
Read Only Fields	Greys out Account fields that you do not want the user to modify. You can grey out a single field or all fields in the selection	ReadOnlyFields=Account:* Default = not set

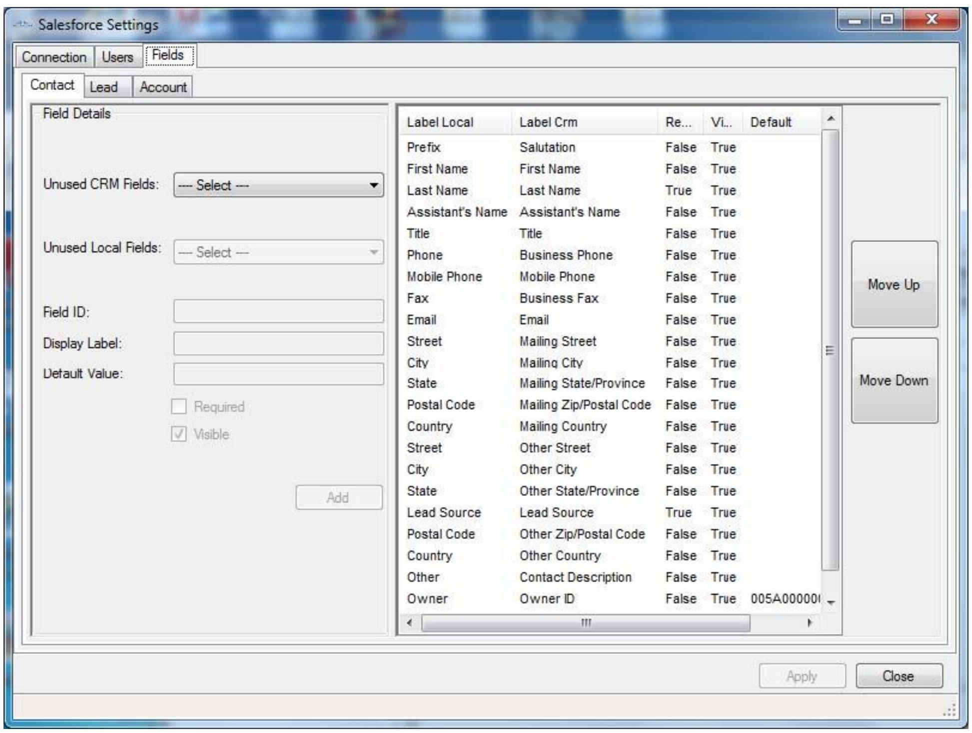
Custom Fields

Scan210 allows you to map your custom fields for Contact and/or Leads into the Scan210 interface so that you can populate those fields before transferring the contact or lead record to Salesforce. This ensures you have captured as much information as possible at the time of scanning the business card.

To add custom fields to SCAN210 select SALESFORCE > Settings and then click on the FIELDS tab.

This will open up the SCAN210 Field Mapping user interface. You can use this interface to modify:

- Unused CRM Fields – Displays a list of fields in Salesforce.com not yet mapped.
- Unused Local Fields – Displays a list of custom fields not yet mapped. Choose Create New to add a new custom field.
- Modify existing mapped fields – NOTE: Right click on existing mapped field and select Edit or Remove.



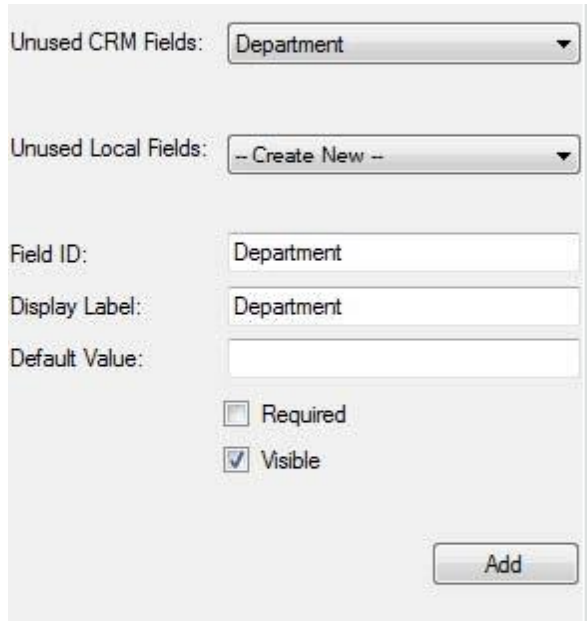
SCAN210 Field Mapping

- Field ID – Internal name given to custom mapped field.
- Display Label – Field name shown on Scan210 details window
- Default Value – Use this field to assign a default value
- Required – Sets field as a required field that must be filled in before transferring to Salesforce

Field Mapping

The Field Mapping window has three tabs: Contact, Lead, and Account. To map a Scan210 field to Salesforce field; from the Main window, select Salesforce > Settings > Fields to open the Field Mapping window.

1. Select the tab for the type of data you want to map: Contact, Lead or Account.



1.

2. Next if you do not see the Scan210 field you want to map in the Unused Local Fields drop down list, you can add the field by selecting Create New.
3. When adding a new custom field, the Field ID and Display Label will default to the value from the Unused CRM fields you selected. You can change these as needed. The Display Label, is the name that will appear in the Scan210 details screen.
4. Enter in an optional Default value. You can use the default to ensure that this custom field always has a set value.
5. Tick Required, it you want the user to always provide a value for this field before transferring to Salesforce.com.
6. Tick or Un-Tick Visible to control of the field is to be visible from the Scan210 details screen.
   Note: you can use the combination of Default and Visible to create a custom field map that always has the same value and by not making the field visible you can be assured the user will not modify the value.

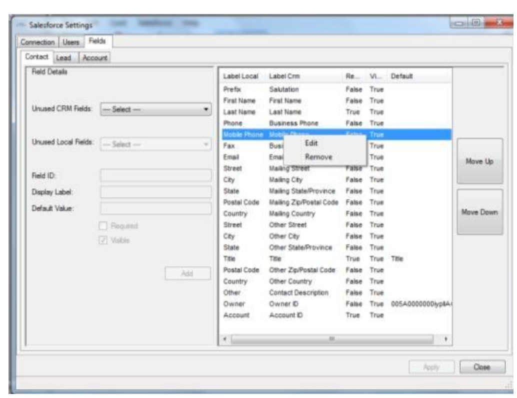
7. Click Add to add the custom field to Scan210.

8. Click Apply to save the changes. Close will also close the window.

9. To edit or remove mapped fields, right click on the field in the mapped fields panel and choose Edit or Remove.

Set Field Order

From the Field Mapping window, you can select Move Up or Move Down to re-arrange the field order. Highlight the field you wish to re-order and then click Move Up or Move Down. When you have completed your changes to the Field Order, click on Apply. To exit this screen click Close.

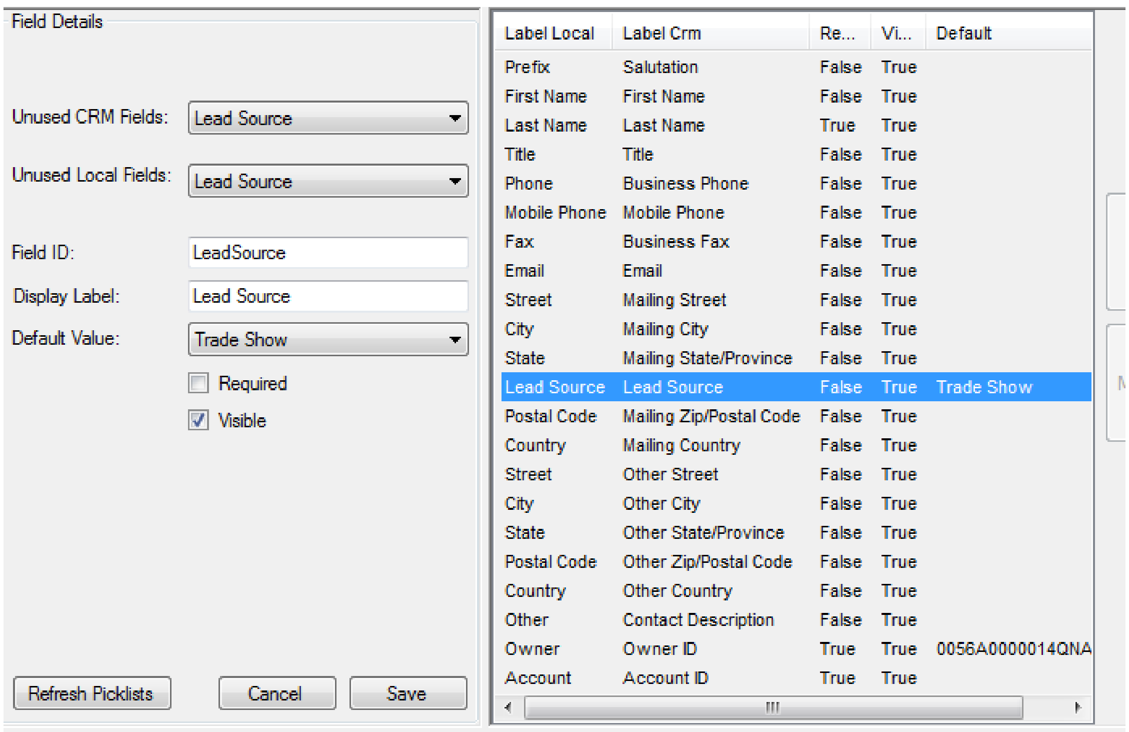


Change an existing mapped Field

To modify an field that is already mapped, right click on the field and select Edit or Remove. Edit will allow you to modify the attributes of the field mapping and remove will un-map the field.

Refresh Pick List

When you update the values of a pick list field in Salesforce you need to refresh the pick list in Scan210. To do this select Salesforce -> Settings -> Fields.   Then select Contact or Lead depending on what Salesforce object the Picklist your trying to update exists in.   Find the field in the list on the right and right click on it and select EDIT. Next select the “Refresh Picklists” in the bottom left corner and then select SAVE.   The next time you view the pick list in Scan210 it will have the new values.



Users List

To add or delete users to the owners list:

1. In the Main window, click Salesforce > Settings > Users to open the Users window
2. To add a user, select the user's name from the Available Users list in the left hand pane and click Add
3. To remove a user, select the user's name from the Selected Users list in the right hand pane and click Remove
4. Click Apply to save your changes.
5. Click Close to close the Users window and return to the Main window
6. This list of selected users will now appear in the card details window when you select Owner

Getting Technical Support

Here is how you can contact Scan210 Technical Support:
Phone: + 1 888 683 3099
10:00 A.M. 6:00 P.M. EST Monday - Friday
Email: support@scan210.com
Visit the Support section at http://www.scan210.com/_support