

Thank you for your interest in OCR Assistant!

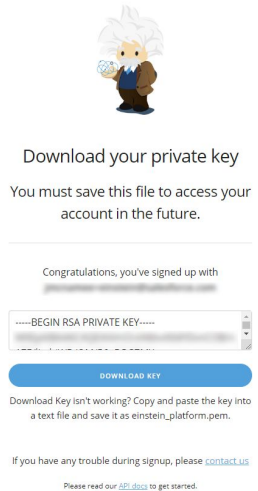
Once you have installed the app from the AppExchange, you will need to follow these simple steps and then are you ready to go!

## 1. Register with the Einstein Platform Services

<https://api.einstein.ai/signup>

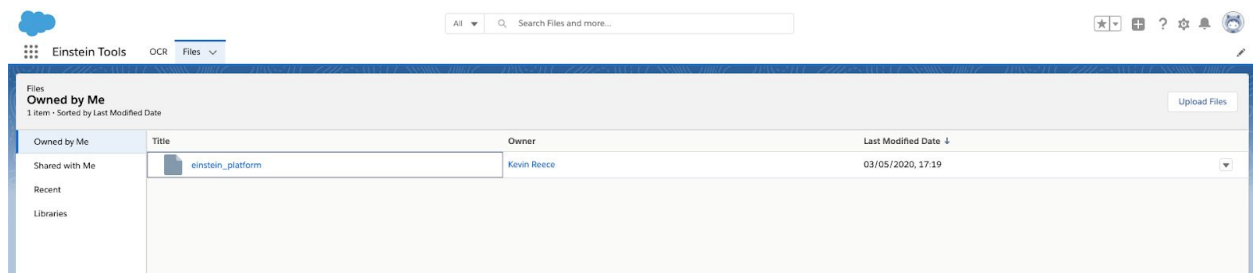
Click 'Sign up using Salesforce' Sign up must be completed using an appropriate developer org

Once signup is complete, you'll have a link to download a PEM file



## 2. Upload your PEM file

From within your Salesforce Org, click on the App Launcher and search for Files from within Lightning Experience, and then upload your new PEM file.



## 3. Update the Custom Settings

The next part of the setup is to enter the email address that you used for Einstein Platform Services into a Custom Setting within the Package.

1. Go to Setup
2. Quick Find 'Custom Settings'
3. Click Manage next to 'Einstein Vision Settings'
4. Click the Edit button next to 'Default Organization Level Value'

5. Enter your Email address [make sure it matches the one you used to register with Einstein Platform Services in Step 1]
6. Click Save

#### **4. Assign user permissions**

To assign the users who require access to OCR Assistant you will need to assign them the 'Einstein Tools' permission set and to do this you will need to

1. Go to Setup
2. Quick Find 'Permission Sets'
3. Locate and Click on 'Einstein Tools'
4. At the top of the page click 'Manage Assignments'
5. Check the box to the left of the user
6. Click 'Add Assignments'

Now the selected users will have access to the Einstein Tools app within the App Launcher.

#### **5. Upload your first image**

To upload your first image and start using Einstein OCR, go to the App Launcher and select Einstein Tools, which will take you to the only tab within the app 'OCR' where you will be presented with a file upload.

Simply select your desired image and once the upload completes, it will push that image to Einstein Vision Services, process the image and return a preview of the image and any OCR results it could find.

**Note:** there is a raw JSON output below the image to show the data from Einstein Vision!

Enjoy!

P.s. Please provide all feedback and feature requests to the GitHub repo:

<https://github.com/SalesforceLabs/OCRAssistant>