

Scan to Salesforce

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At a Glance

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1. What is Scan to Salesforce?
2. Problems and solutions
3. How it works

Inquiries

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1. What is Scan to Salesforce?

Scan to Salesforce is a leading mobile business card scanner app optimized for Salesforce. It offers quick installation organization-wide, a clean UI, and simple functionality. Integrating it with Salesforce helps build a robust and updating contact database with minimal time and effort.

The app is developed by Sansan Inc., a Salesforce Ventures portfolio company founded in 2007. The company went public in 2019 (Tokyo Stock Exchange [TSE]: 4443). Its flagship and namesake Sansan platform is an enterprise business card-based contact management service used by 6,000+ companies worldwide.

2. Problems and solutions

Job role	Related pain problems	Scan to Salesforce solutions
Sales Manager, Sales Ops	AEs often don't enter full contact data. This makes it hard to analyze account coverage and revisit opportunities. Manual data entry is both inconvenient and a waste of valuable time.	The app takes just two taps for AEs to upload business card data to Salesforce after scanning. Context data (date, location, memo, handwritten notes) is easily added for a richer customer record.
Demand Generation Marketer, Marketing Ops	Following up on leads normally requires waiting for the field marketing team to manually enter all the data. This wastes precious lead time after trade shows and events. It also makes it hard to track event ROI.	Using the app and a smartphone, users scan four cards with a single tap. This can be done on-site, immediately after acquiring contacts. Campaigns can be added when data is converted to Leads. A flag function makes it easy to trace Leads created from the app.
Salesforce Admin	Sales and marketing reps' manual entry creates a dirty and hole-filled Salesforce database. Duplicate accounts, missing information, typos – these can all lose opportunities. Contact data also needs to be kept secure.	Admin can regulate data input by disabling transfer to Contacts. When a new record hits the org's duplicate rules, users can overwrite selected fields. Scan to Salesforce gives secure data transfer and doesn't host the contact data.

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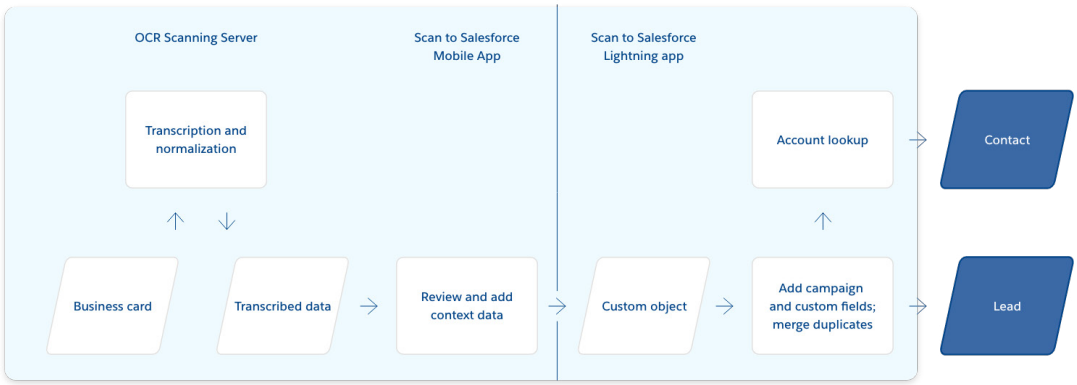
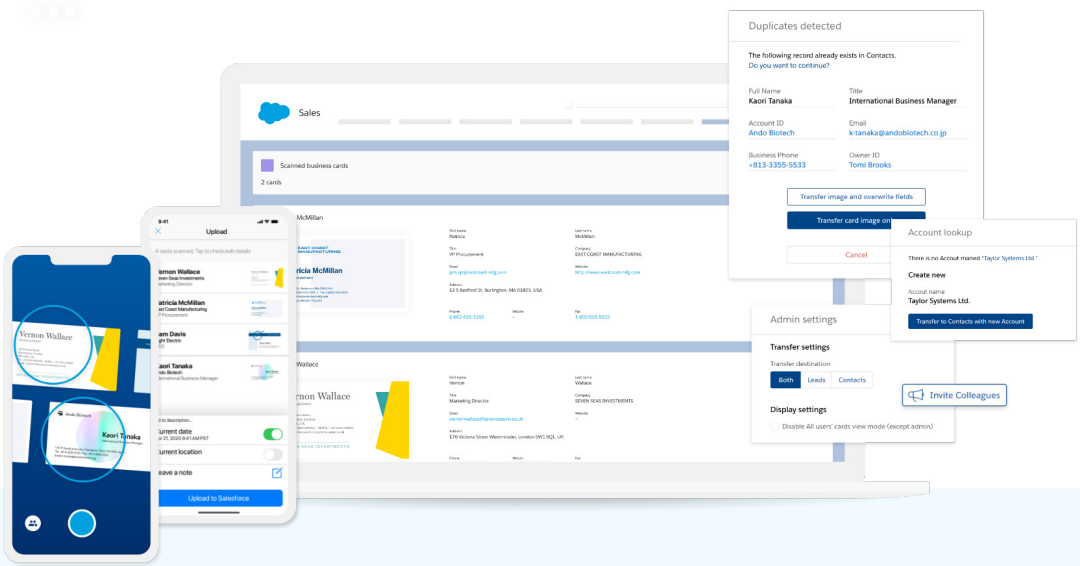
3. How it works

3-1. Data flow

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



3-2. Mobile & Salesforce app



3-2-1. Mobile app funtions and specifications:

Scan	4 cards at once 16 major languages Address validation Name normalization
Attach	Time and location Notes (voice memos) Reverse side image
Security	Biometric authentication

3-2-2. Salesforce app functions and specifications:

Destination objects	Lead, Contact, Account, Campaign
Duplicate handling	Overwrite when duplicate rule applied (optional), account lookup in contact creation
Configurable fields	Lead Owner, Record Type, Lead Source, Custom Fields
User control	Transfer destination (Lead, Contact, or both), my cards only vs all cards
User interface	Lightning-native, works with Salesforce mobile app (English and Japanese UI)
System requirements	Sales Cloud Professional Edition and above

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