

CSSN

Scan2CRM - Salesforce USER GUIDE

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INTRODUCTION

OVERVIEW

Scan2CRM is an application that scans ID and business cards, and automatically inputs both their textual data and image to a new contact record in your CRM application, either through the Internet or locally. Within seconds of placing a card into the scanner, **Scan2CRM** pulls the information off the card using OCR – Optical Character Recognition technology, and automatically populates the text fields of a new contact record in your CRM software (name, title, phone number, etc.), while also capturing an image file of the card. Scan2CRM works directly with CRM applications making it the only business card scanning package that does not require cards to be scanned into a 3rd party application before the information can be imported into CRM software.

Features

- Full integration with CRM software - Scans business cards directly and automatically into CRM software
- Capture both data and image
- Just a few seconds per scan
- Auto detect function - just place the card in the scanner

Scanner specifications

- Powered by the computer USB – No external power source is needed
- Small footprint, fully mobile

GETTING STARTED

BEFORE USING THE SCANNER

The scanner has been carefully packaged to avoid damage during transportation. Before operating the scanner, please remove the packaging materials. After removing the packaging materials, you will find the following:

- ScanShell scanner
- Application CD
- USB interface cable
- Calibration paper
- Cleaning paper

MINIMUM SYSTEM REQUIREMENTS

The minimum system requirements are:

- Pentium III with 128MB
- Win 98 Second Edition or higher
- USB port
- Microsoft Outlook 2000 or higher installed

CONNECTING THE SCANNER

The scanner is connected to the computer via the USB port. To connect the scanner, do the following:

- Place the scanner on a flat, firm, solid surface with easy access.
- Plug the USB interface cable into the USB port of the computer
- After the *Add new hardware wizard* dialog box appears, click *Next* until you are asked to set the driver for the reader. You'll find the driver on the Installation CD at: < CD-ROM drive >:/Driver/800 (for the ScanShell 800 or 800N scanner model)
- After you specify the driver, click *Next*.
- You will be presented with a standard Windows message:



- Click *Continue Anyway*. The installation of ScanShell scanner drivers is safe for your computer and will not affect your system.
- Click *Next* until the installation is complete.

INSTALLATION

To install the software on the computer, do the following:

1. Close all programs.
2. Insert the CD into the CD ROM drive.
3. Wait until the install program begins and follow the instructions on the screen.
4. If the install program does not automatically start, click the *My Computer* icon on the desktop and then select the CD ROM drive.
5. Double click on the *Setup* program.
6. Wait until the install program begins and follow the instructions on the screen.
7. Setup will check if Microsoft .NET framework 1.1 or higher is installed on your computer. If it is not installed, setup will prompt you to install it. Click "Yes" to install Microsoft .NET framework or "No" to skip Microsoft.NET framework installation.
8. Please note that if Microsoft .NET framework 1.1 or higher is not installed on your computer, you will not be able to install and use **Scan2CRM**.
9. Select your CRM software from the list when prompted.

UNINSTALL

To uninstall the software, open the *Add-Remove Programs* control panel. Select *Scan2CRM* and click on *Add/Remove*. Follow the uninstall instructions until the operation is completed.

USING SCAN2CRM

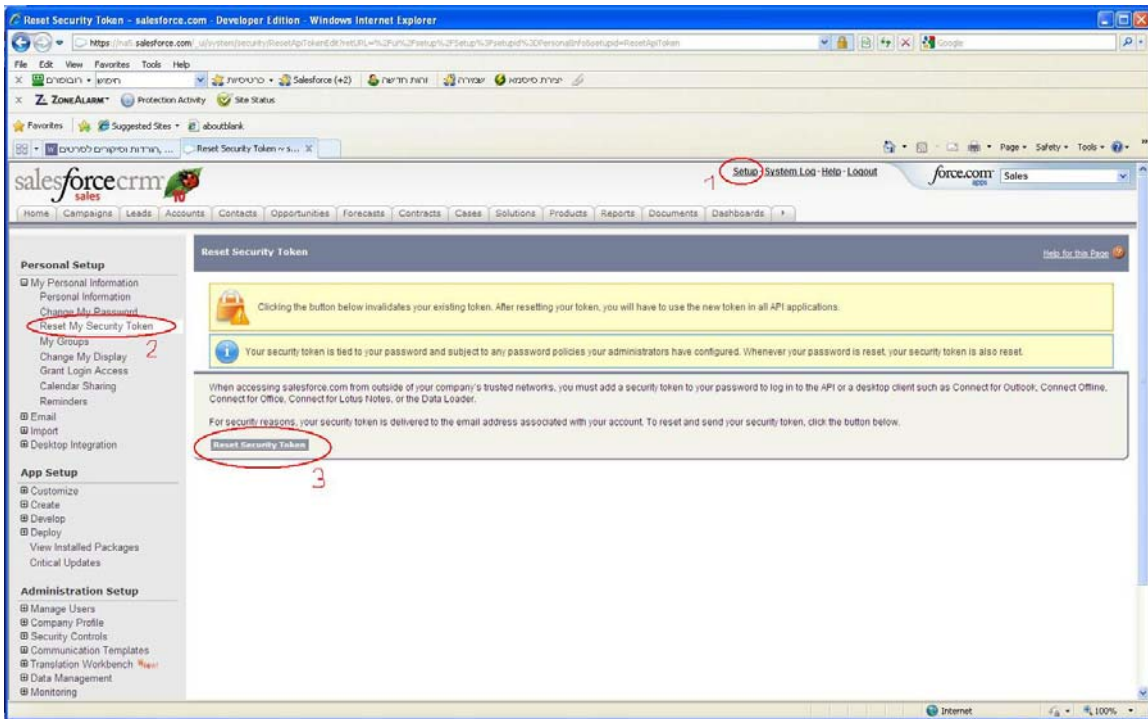
LOGIN

Fill in your **SalesForce user name and password** (provided by SalesForce), and select your CRM software from the list.

Reset Security Token

In order to increase Scan2CRM security SalesForce may require resetting of your security token, to do that login to your SalesForce account, click on Setup -> Reset my security token -> Reset security token.

You should then receive an Email from SalesForce with instructions of how to install the new security token.












APPLICATION INTERFACE

Scan2CRM puts up a small toolbar, which can be dragged and placed anywhere on the screen.



Scan2CRM Toolbar


	Name	Description
	Enable/Disable Scanning.	If enabled and the scanner is

	Green=enabled, scanner is connected	connected, inserting a card into the scanner will start the scanning process automatically.
	Enabled – Scanner is disconnected	Scanning cannot take place
	Disabled	Scan2CRM is disabled
	CRM connected	Press this button to bring up the login window, in which you can select your CRM software and connect to it if it is not connected.
	CRM disconnected	
	Open the Configuration Window	
	Export data to CRM	Allows the export of data that was scanned in offline state to the CRM software when in online state
Contact ▾	Contact type selection	Allows selection of contact type according to the options of the selected CRM application
	Always on top	If pressed, the Scan2CRM window remains visible at all times

SCANNING CARDS

Working online

When working online, **Scan2CRM** is connected to the CRM software, which can be either an Internet/Intranet CRM application displayed in a browser, or locally installed CRM software accessed through the network.

1. Make sure scanning is enabled  (The Enable button is green meaning the application is enabled and the scanner is connected). Otherwise press on the button, select your CRM application and connect).
2. Insert a card into the scanner. The card will be scanned automatically and the following window containing the scanned data will open:

New Contact

Contact Information

Contact Owner: [] Phone: (999) 123456-000

Account: [] Home Phone: []

Title: COMMERCE Managing Mobile: []

Department: [] Other Phone: []

Birthdate: [] Fax: 123456-000

First Name: Mr. [] Sample Email: Sample@Sample.com

Last Name: Sample Assistant: []

Reports To: [] Asst. Phone: []

Lead Source: Web []

Address Information

Mailing Street: 17755 Sky Park East -> Suite 101 Other Street: []

Mailing City: Sample Other City: []

Mailing State/Province: CA Other State/Province: []

Mailing Zip/Postal C.: 123456-000 Other Zip/Postal Code: []

Mailing Country: [] Other Country: USA

Additional Information

Languages: English Level: Secondary []

Description Information

Description: []

OK Cancel

Scanned data window

3. You can edit details and add more details in empty fields.

Note: Fields marked in red must be filled in. The layout and mandatory fields can change according to the CRM system or individual configuration.

4. Click OK to save the record. The record will be saved automatically in your CRM Software. If you selected "Open the scanned card in the CRM application" option in the program settings, the new record will be displayed in your CRM application. If this option is not selected, the record will be silently saved in your CRM application in the background.

Note: If you use Internet-based CRM software, it does not have to be opened in the internet browser. Data transfer will take place silently in the background.

Chain-feeding

If you chain-feed cards into the scanner the scanned data will be saved automatically as soon as the next card is scanned.

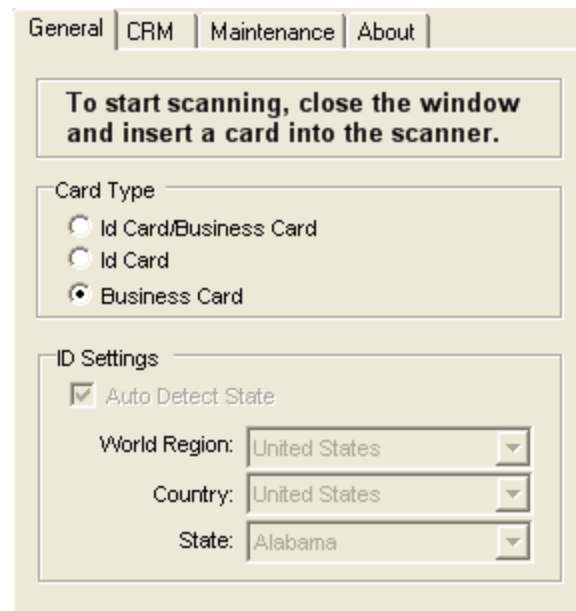
Working offline

Working offline is desired when you do not have a connection to your CRM software, or if you want to quickly scan a large number of cards. It allows you speedy chain-feeding of cards into the scanner. The scanned data is saved locally. When you connect to your CRM software, press the "Export data to CRM" button, to transmit the scanned data to the CRM software.

APPLICATION CONFIGURATION

To open the application settings, press the Configuration button

GENERAL



General | CRM | Maintenance | About

To start scanning, close the window and insert a card into the scanner.

Card Type

Id Card/Business Card
 Id Card
 Business Card

ID Settings

Auto Detect State

World Region: United States
Country: United States
State: Alabama

Configuration – General tab

Card Type

Select card type:

- **ID Card/Business Card** - *Scan2CRM* will first attempt to recognize the scanned card as an ID card, e.g., driver license. If the card is not recognized as an ID card it will be handled as a business card. This option is useful if you scan both ID and business cards.
- **ID card** – The scanned card will be handled as an ID card.
- **Business card** – The scanned card will be handled as a Business card.

ID Settings

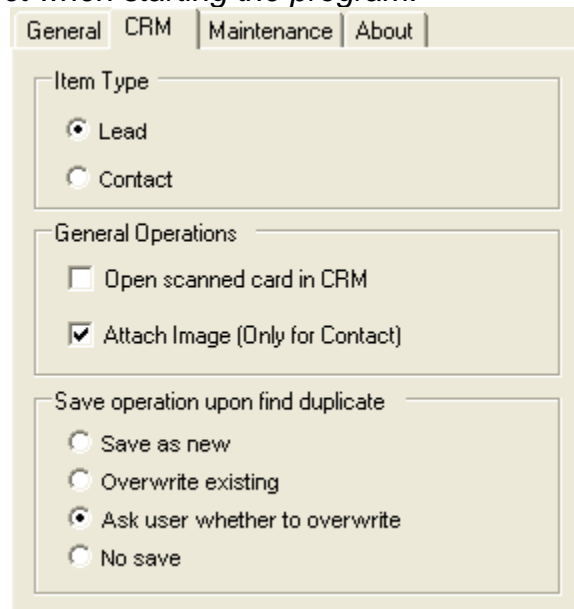
These settings refer only to the scanning of ID cards.

Auto Detect State – If checked, the application will attempt to detect the (US) card issuing state automatically. If this option is unchecked, (uncheck it if it fails to recognize the card issuing state), select the region, country and state manually from the dropdown lists.

CRM

This window allows you to configure the selected CRM application's specific parameters.

Note: *The options available in the CRM section change according to the CRM application you select when starting the program.*



The screenshot shows a configuration window with four tabs: General, CRM, Maintenance, and About. The CRM tab is selected. The window is divided into three sections:

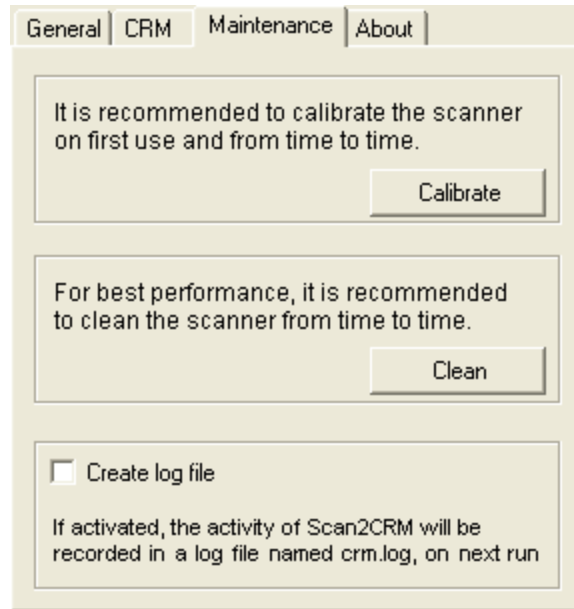
- Item Type:** Two radio buttons are present. 'Lead' is selected, and 'Contact' is unselected.
- General Operations:** Two checkboxes are present. 'Open scanned card in CRM' is unselected, and 'Attach Image (Only for Contact)' is selected.
- Save operation upon find duplicate:** Four radio buttons are present. 'Ask user whether to overwrite' is selected, while 'Save as new', 'Overwrite existing', and 'No save' are unselected.

Configuration – CRM tab

Salesforce CRM

- **Item Type** – Select either Lead or Contact.
- **Open scanned card in the CRM application** – Check this option to have the scanned card opened in the CRM software automatically after saving. If unchecked the record will be save silently to the CRM software.
- **Attach image** – Allows you to attach the image of the card to the record (only in the case of contacts).

Maintenance



Configuration –Maintenance tab

Scanner calibration

Scanner calibration resets the scanner color sensor and generates higher accuracy in the OCR detection process. When you use the scanner for the first time, you will be prompted to calibrate the scanner. Calibrating the scanner is also a good idea if you notice deterioration in scanning and OCR quality.

- Insert the calibration paper that came with the scanner into the scanner.
- Click the 'Calibrate Scanner' button.

Note: The scanner *must* be calibrated before the first use

Cleaning the scanner

It is recommended to clean the scanner from time to time, especially if you notice irregularities and deterioration in scanning and OCR quality.

- Insert the cleaning paper that came with the scanner. You can add a few drops of alcohol or cleaning solution to the cleaning paper.
- Click the 'Clean Scanner' button.

APPENDIX A: TROUBLESHOOTING

Description	Answer
When I try to enable Scan2CRM I got an error message, which says that another CSSN application is open.	Scan2CRM can not work while another CSSN application is running. To activate Scan2CRM, disable or close the other application and press on the state button in the toolbar.
The application CRM Connection State is set to <i>Disabled</i> on startup.	Try to enable the application by pressing on the button and performing login again.
There are irregularities or deterioration in scanning and OCR quality.	Clean and calibrate the scanner
Scan2CRM asks Username and Password, where do I get those	Scan2CRM requires your Salesforce Username and Password in order to connect to your account to store the scanned information. Please use the Username and password provided to you by Salesforce.
I get a message that Login Must Use a Security Token, what is that?	In order to increase security Salesforce issued a security token, please follow the instruction above to reset your token. For further information you will have to contact Salesforce support.
Any other problem or question.	Email our technical support at support@cardscanning.com