

VISION^e | scan

Scan User Guide

FOREVER FREE PLAN

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Introduction

The Vision-e Scanning Solution presents a Forever package, comprising of three key features:

- 1) Scan and save business card data in your phone's Contact list.
- 2) App branding. White-label app with your logo and colors
- 3) Send Business Card images to Salesforce (requires the free Vision-e Scan package on the AppExchange).

The Free forever plan is for unlimited users and unlimited usage.

PHONES CONTACT LIST

While the Vision-e Scan solution can seamlessly integrate with Salesforce, it's important to note that this integration is optional and not required.

You have the ability to handle various types of cards, including traditional paper business cards, NFC digital business cards, QR Codes, and event badges. To successfully process information from NFC cards and QR codes, they need to contain data in the vCard format. It's important to note that URL codes cannot be processed by your phone's Contact list, as they lack the necessary data.

App Branding

Navigate to the main menu, select Settings, and then click on App Branding to modify the logo and color scheme.

SALESFORCE SCANNING QUEUE

If you've installed the free Vision-e Scan AppExchange package in your Salesforce org, you have the capability to capture a photo of a business card and subsequently send that image to Salesforce. The business card image can be accessed within the Salesforce scanning queue, where you have the option to input data and further proceed with it as either a Lead or Contact.

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PLEASE NOTE:

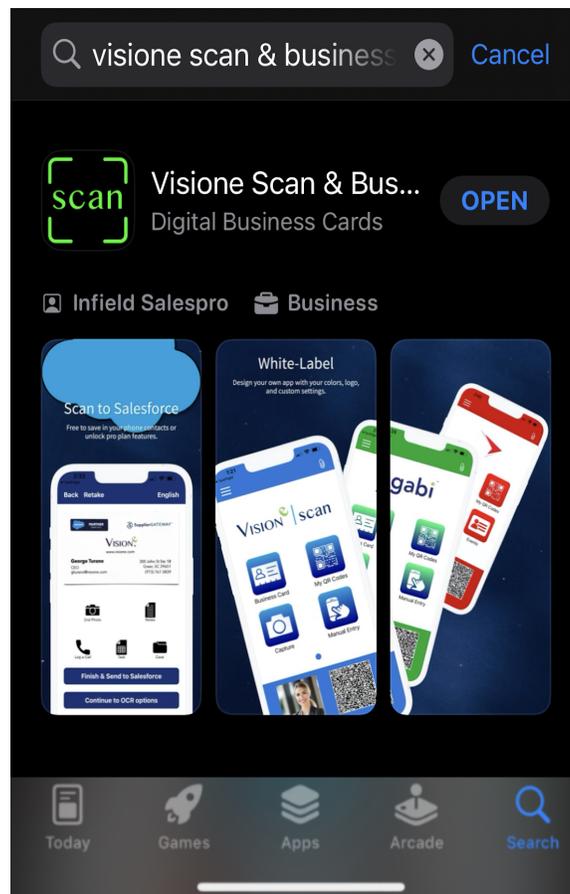
- Free Plan does not include support
- Free Plan does not guarantee any features accuracy or availability
- Free Plan features may be discontinued at anytime without notice

Installation

1.1 Install Scan Mobile App

Step 1

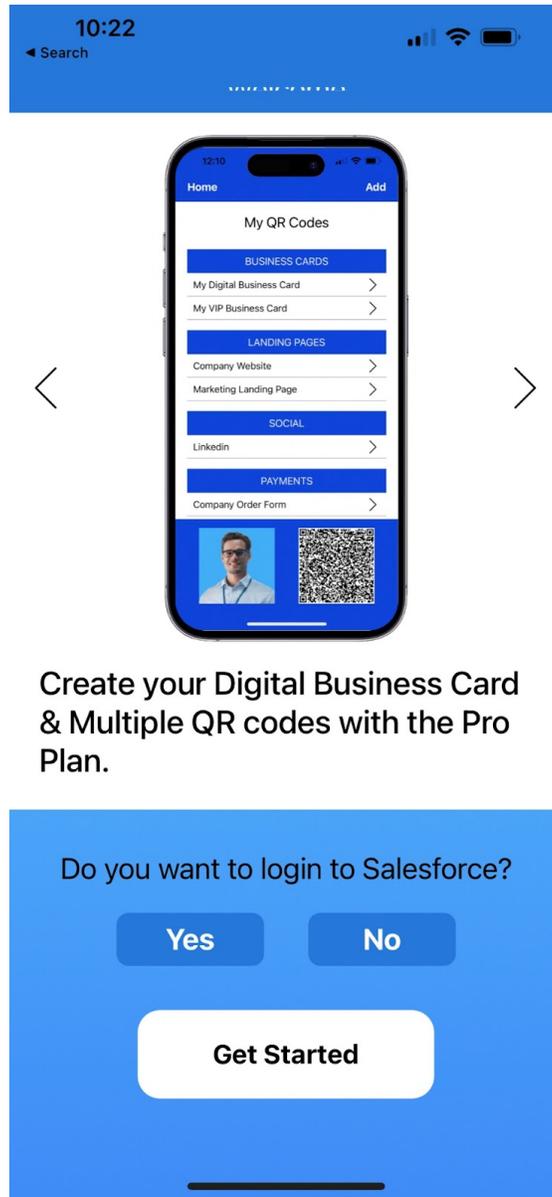
From your smartphone device, search “Vizione Scan & Business Cards” from your dedicated App Store (i.e. - Apple App Store or Google Play Store)



Note: Download links are available online by visiting www.visione.com

Step 2

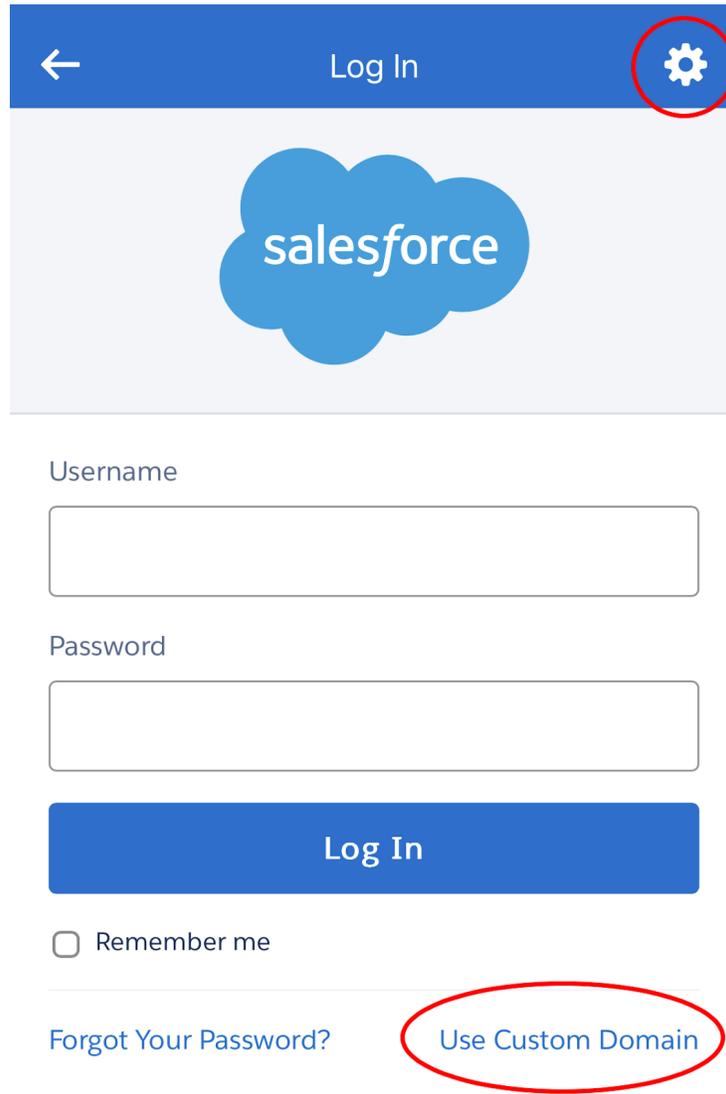
After installing the app, you'll be presented with the choice to either begin by clicking the "Get Started" button or optionally logging into a Salesforce account.



Create your Digital Business Card & Multiple QR codes with the Pro Plan.

Step 3

If you opt to log in to Salesforce, you can access the Sandbox environment by clicking the gear icon. To log in using a custom domain, simply click the "Use Custom Domain" link.



← Log In

salesforce

Username

Password

Log In

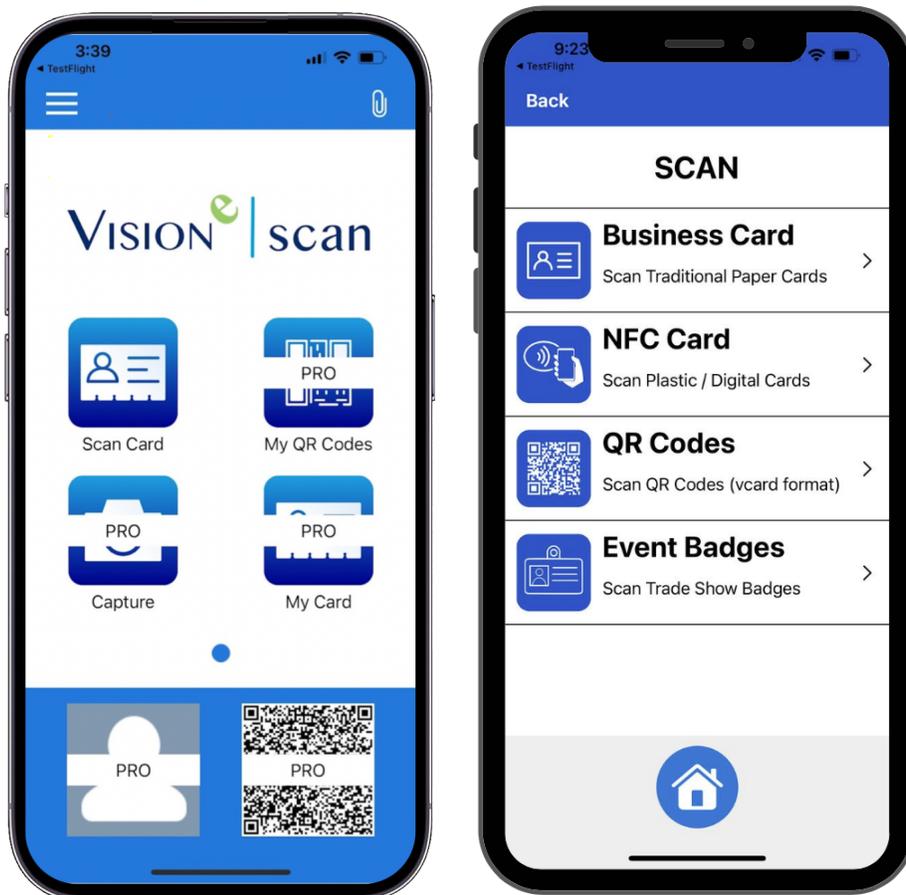
Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

Getting Started with Scanning

2.1 Scan a Business Card

Launch the mobile app and select the Scan Card module:



The Scan Card module offers four options to capture contact details:

- Traditional paper business cards
- NFC digital business cards
- QR Codes
- Event Badges

BUSINESS CARD SCANNING

To utilize the Business Card option, simply take a photo of the business card. Apple devices will automatically capture the photo, while on Android, you'll need to press the photo button, and you'll then have the option to crop the photo if necessary.

Note: You will be required to allow the Scan mobile app to access your device's camera. Make sure to tap on Allow if prompted.

BEST PRACTICE:

Image processing should be conducted in landscape mode, unless the business card is oriented in portrait layout

NFC DIGITAL BUSINESS CARD SCANNING

This option will allow you to place the NFC card near your mobile device to read the contents. If it's in vcard format you will have the option to proceed. If it's in URL format you may have the option to exit the app and open in a browser.

QR CODE SCANNING

This option will automatically read the QR data. If it's in vcard format you will have the option to proceed to format data. If it's in URL format you may have the option to exit the app and open in a browser.

EVENT BADGE SCANNING

To utilize the Event Badge option, simply take a photo of the event badge. The solution is designed to capture the Company and Name. If the Company and Name does not populate you can tap the text field to select or type text.

Note: The Event Badge option will not read the badge QR Code. Use the QR Code option to read the content of the QR code.

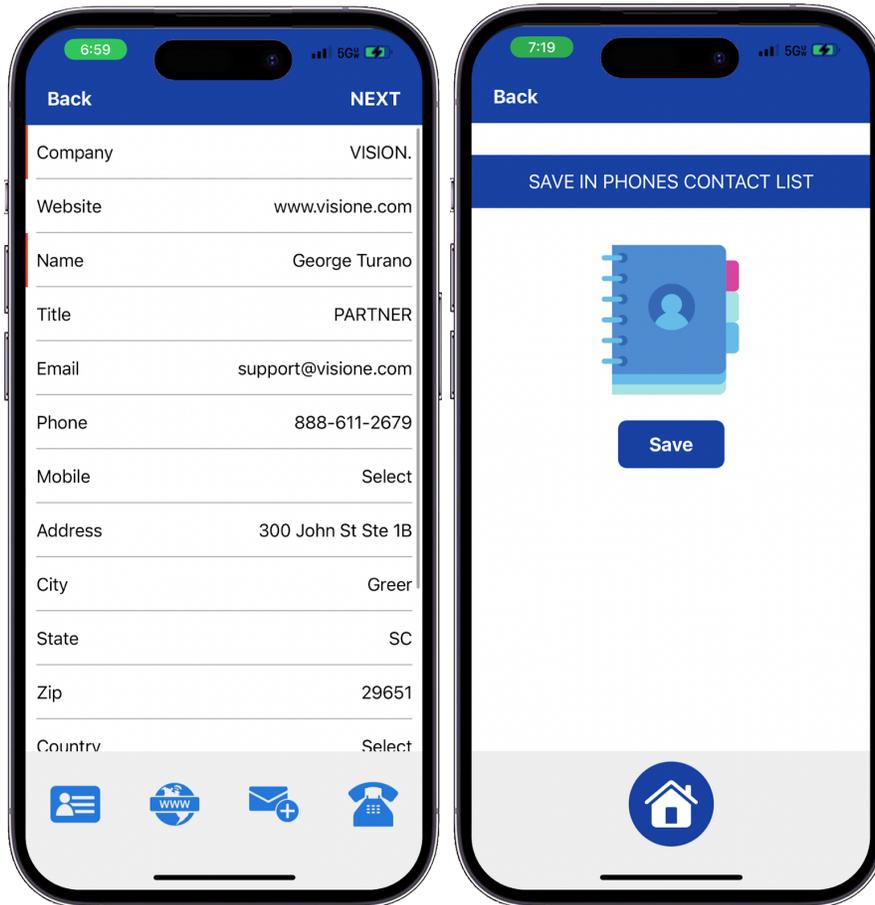
2.2 Permission Sets

If you installed the Scan package from the AppExchange, You must have the "Scan App Permission Set" permission set for access to the Salesforce Queue.

The screenshot shows the Salesforce Setup interface for 'Permission Sets'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar contains the text 'permission'. The left sidebar shows a list of items under 'Users' and 'Custom Code', with 'Permission Sets' highlighted. The main content area displays the 'Permission Sets' page, which includes a 'New' button, a 'Clone' button, and a table of permission sets. The table has columns for 'Action', 'Permission Set Label', and 'Description'. The table lists several permission sets, including 'Scan App Events', 'Scan App Events (Admin)', 'Scan App Permission Set', 'Scan App Permission Set (Admin)', and 'Scan App Permission Set (Admin) Clone'. The page also includes a 'Help for this Page' link and a 'Print' icon.

2.3 OCR Results - Save to Phone Contact List

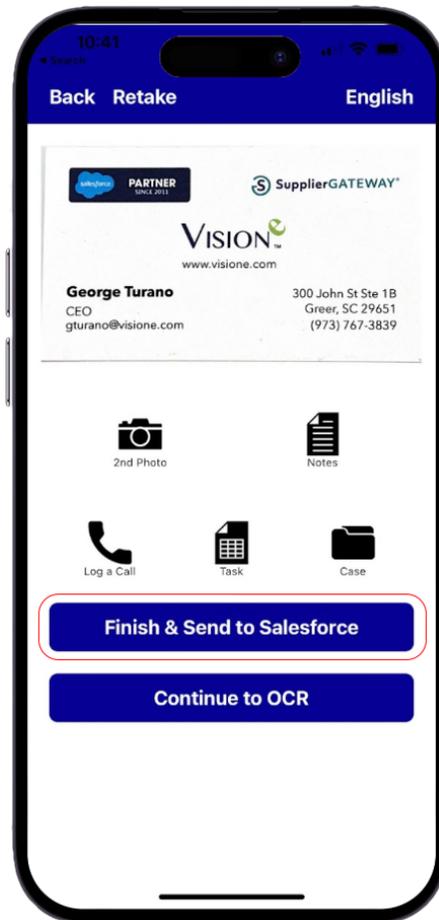
Click the "Continue to OCR" button to access your scan results. You have the option to update text by clicking in the text field to tap or type text. Click Next link to save in Phone Contacts.



2.4 Send Business Card image to Salesforce

Note: You must have the “Scan App Permission Set” assigned to use the Scanning Queue.

If you have the free Vision-e Scan Salesforce AppExchange Package you can send the Business Card Image or Event Badge Image to the Salesforce Queue.



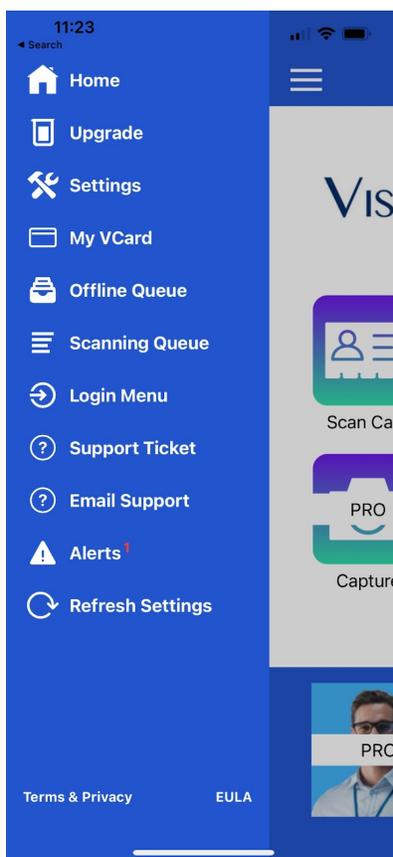
2.5 Scanning Queue in Mobile

Step 1

Go to the side menu of your mobile Scan app and select Scanning Queue.

Step 2

You'll then be navigated to your Scanning Queue where all pending uploads to add data and process as a Lead or Contact.



Note: Users can access their Scanning Queue in a browser by logging into Salesforce.com and navigating to the scanning queue.

2.6 Scanning Queue in a Browser

Step 1

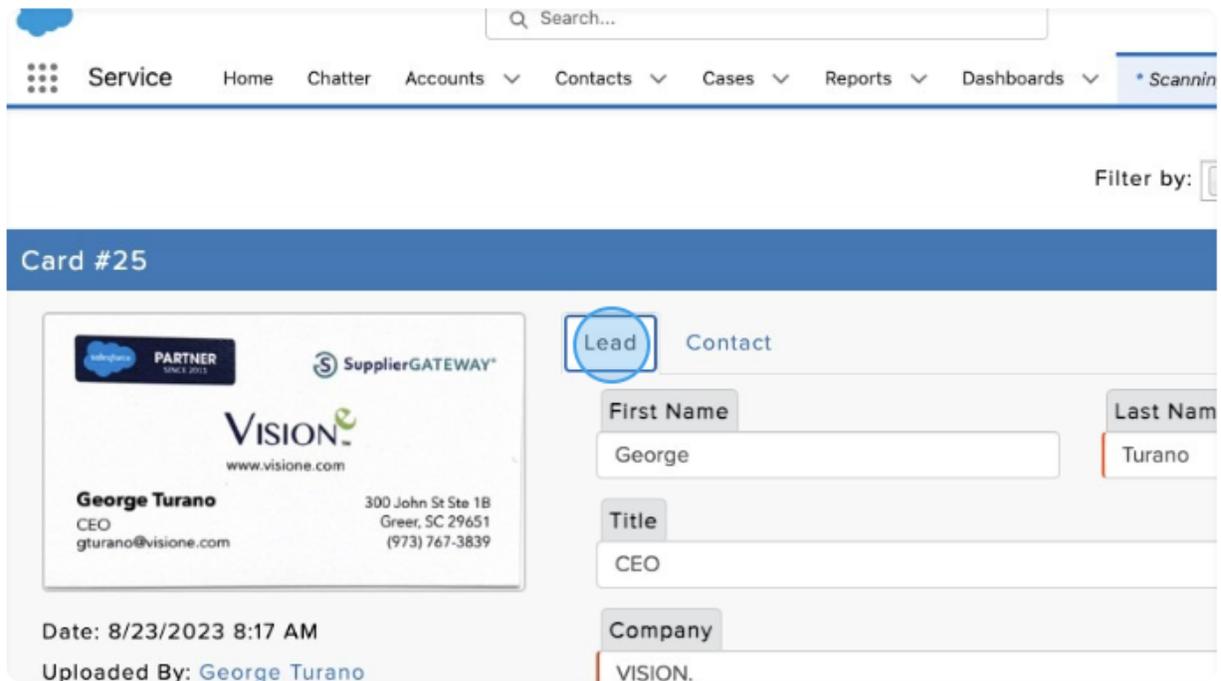
While logged into Salesforce, search Scanning Queue in the App Launcher. View a simple how-to:

https://scribeshow.com/shared/Salesforce_Scanning_Queue__kc6DpQrCRRK4jaNDOB3XcQ

Step 2

You'll then be navigated to your Scanning Queue where all pending uploads to add data and process as a Lead or Contact.

Note: Free Plan does not OCR to populate text fields.



Salesforce Scanning Queue

3.1 Create Contacts or Leads

Create Salesforce Contacts or Leads within the Scanning Queue.

Step 1

After you have scanned a business card and uploaded it to Salesforce, locate the Scanning Queue page.

Step 2

To process the card as a Contact or Lead, choose either the Contact or Lead tab.

Step 3

Once the card has been edited and the information is correct, select Create Lead or Create Contact.

Step 4

You have now created a new Lead or Contact in Salesforce!

Frequently Asked Questions (FAQs)

What is OCR?

Optical Character Reader (OCR) is a technology used to convert different types of documents, such as business cards, into machine-readable text data. When you process the business card on the phone the OCR data will be displayed on the phone. The free plan does not OCR when you send to the Salesforce Queue. The pro plan includes OCR service.

What mobile devices are supported?

Apple on the App Store and Android on Google Play.

What's the difference between Free and Pro editions?

The Pro edition includes OCR service to automatically populate text fields from the business card image. The OCR service also rotates the card to the proper orientation. You have the option to add custom Contact and Lead fields, Pro support and more.

Why aren't the text fields populated?

Text translation requires OCR service which is available within the Pro edition. Check the OCR status on the Scanning Queue.

Help & Support

If you contact support on the free plan you may not get a timely response due to pro plan customer priorities.

If you wish to purchase the pro plan or paid support, contact us at:

Email: Support@Visione.com

Toll Free: (888) 611-2679

Website: www.Visione.com

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