Scan User Guide

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Introduction to Vision-e's Scanning Solution

The Vision-e Scanning Solution was created for salespeople by salespeople as the easiest way to get what is not in Salesforce, into Salesforce: business cards.

Did you know that 88% of business cards do not make it into Salesforce? Data cannot be actionable if it is not in Salesforce. With our solution, you can snap a picture of a business card from a mobile device or tablet. With one more tap, send the card to Salesforce and process it as a Salesforce Contact or Lead! It is the fastest and easiest way to get data into Salesforce. Period.

With advances in innovation and technology, our scanning solution has evolved and can now offer additional value beyond business card scanning. With voice translation services and other added enhancements, the Vision-e Scanning Solution provides you with full on customer engagement, so you never miss an opportunity.

We are here to help you have a great user experience and a fast start in scanning your business cards to Salesforce, as well as to see you succeed in increasing your opportunities to win by 88%!

Still not convinced? Don't listen to us. Listen to some of our clients below:

"The beauty of this app is in its simplicity. I have it installed on Android and iOS devices without any problems. Edit capability after OCR has taken place is easy and intuitive...This is new and destined to get better and better with age."
Rick Knapp, Honeywell

"Excellent OCR! Scan is excellent, enabling our team to quickly get Contacts and even Accounts into Salesforce effortlessly."
Chris P., LineDrive Unlimited

Visit www.Visione.com for more customer reviews and case studies around Scan!

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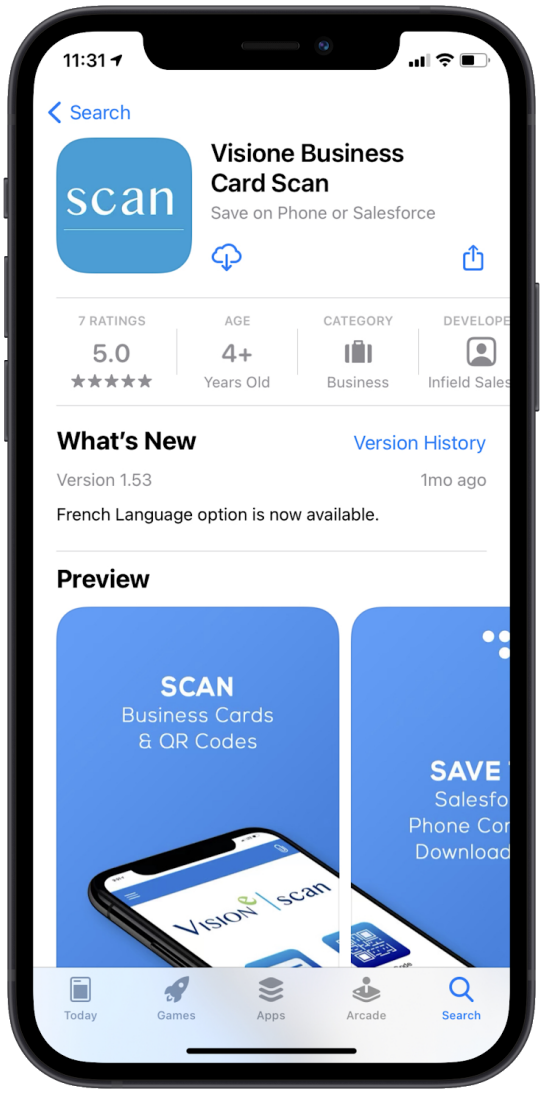
Installation

1.1 Install Scan Mobile App

Before installing Scan on your mobile device, confirm Scan has been successfully installed within your Salesforce Organization by speaking with your Administrator.

Step 1

From your smartphone device, search **Vision-e Scan** from your dedicated App Store (i.e. - Apple App Store or Google Play Store)



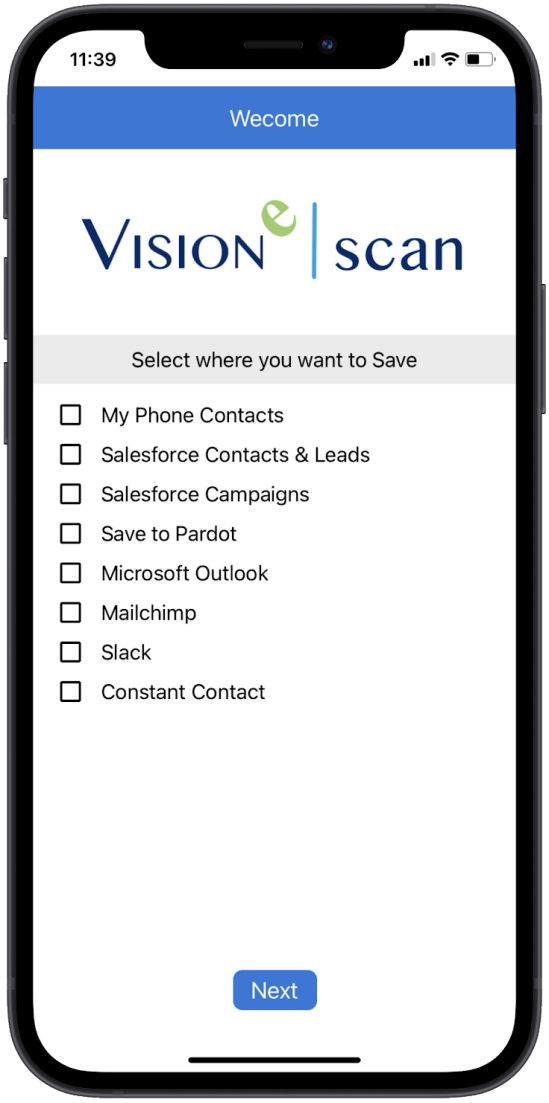
Note: Download links are available online by visiting www.visione.com/scan

Step 2

Once you've located the app listing as shown above, begin the installation process when ready.

Step 3

Once installed, launch Scan and select if you wish to sync your Phone Contacts, Salesforce Contacts & Leads, Salesforce Campaigns, Save to Pardot, Save to Microsoft Outlook, Mailchimp, Slack and/or Constant Contact as shown below.

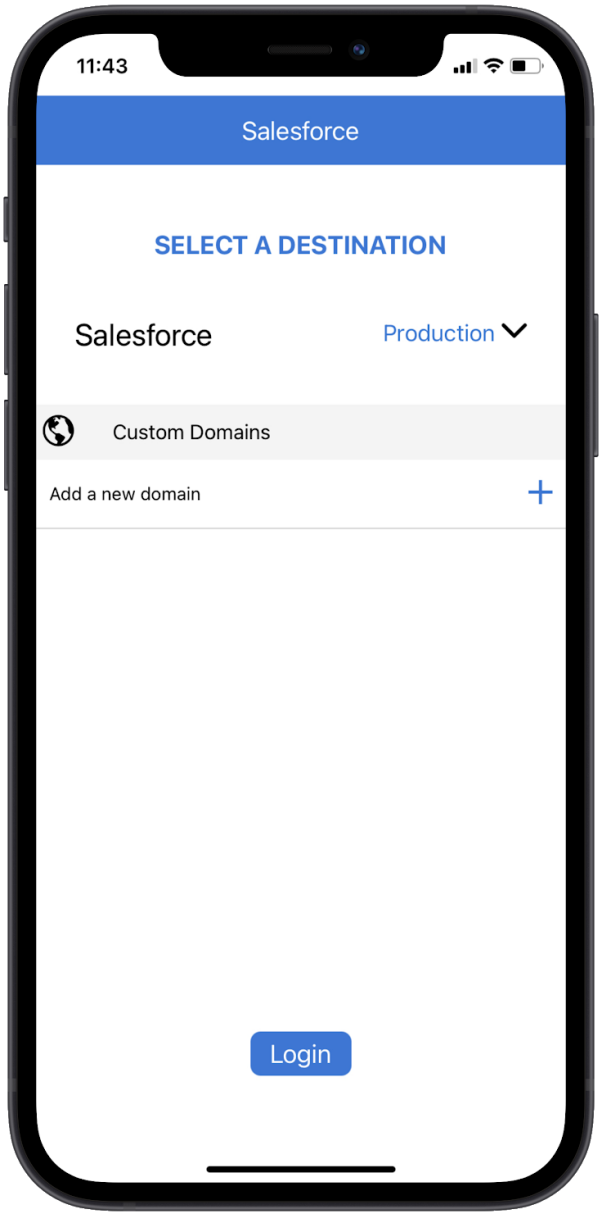


Step 4

Tap **Next** when done.

Step 5

Select which Salesforce environment the Scan app is installed under (i.e. - *Production* or *Sandbox)* from the destination drop down menu. Tap on **Login** when done.



Note: If you wish to connect a Custom Domain to your Scan app, tap **Add a New Domain** as shown in the above image. When ready, navigate to the *Single Sign-On*

(SSO) & Custom Domains section of the Scan User Guide and follow the provided steps.

Step 6
Type in your Salesforce.com credentials then tap **Login**.

Step 7
Next, you will be asked to allow the Scan mobile app access to your Salesforce instance; click **Allow**. Your business card scanning app is almost ready!

Single Sign-On (SSO) & Custom Domains

Single sign-on (SSO) lets users access authorized network resources with a single login as per Salesforce which helps with benefits that consist of increased security, time saving, increased user adoption, and so forth.

If your Salesforce Organization utilizes SSO, you're in luck! Our Scan application will allow users to sign onto our scanning mobile solution using their SSO capabilities.

2.1 Setting Up SSO / Custom Domain

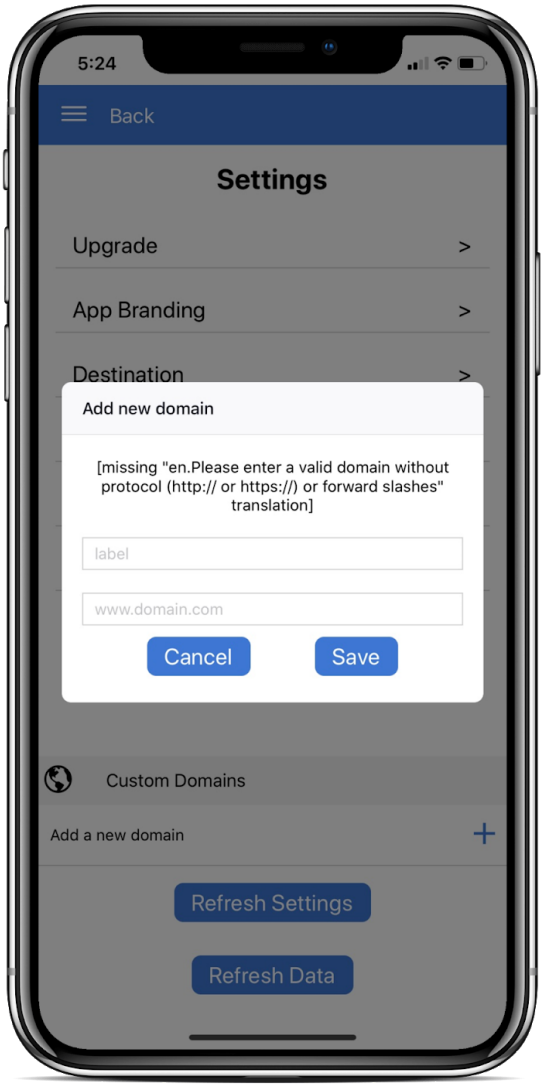
In order to have your Scan mobile app recognize your already created custom domain within Salesforce, please follow the steps below:

Step 1
Launch the Scan mobile solution on your smartphone device. Access your side menu and tap on **Settings**.

Step 2
At the bottom of your screen, tap on **Add new domain** under Custom Domains.

Step 3
Once the pop-up appears, provide the custom domain with a Label of your choice then type in your Salesforce's custom domain.

Note: Please make sure to enter a valid domain without protocol (http:// or https://) or forward slashes



Step 6

Tap on **Save** when done.

Step 7

Before you tap on **Log in**, make sure to tap on the *Environment* dropdown menu to select the newly added Custom Domain with the Label you entered.

Step 8

Tap **Done** when ready. You'll then be asked to login using your credentials.

Following this method will allow you to prevent having to enter your custom domain every time the application is launched.

Step 9

When ready, tap on **Log In** and begin scanning!

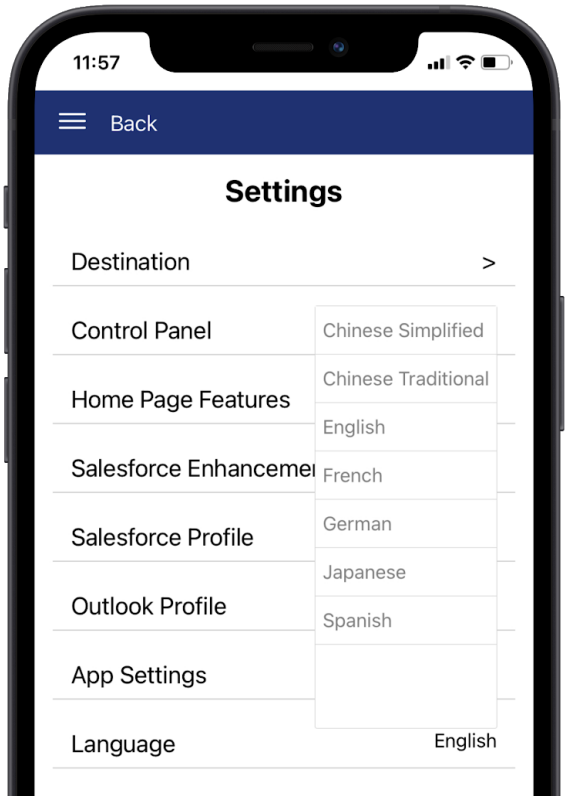
Setup & Configuration

3.1 Update Default App Language

Scan is utilized on every corner of the map, therefore, we understand not all of its subscribers use English as their default language.

Step 1

Access your side menu and select **Settings**. Next, tap on **App Settings** then select **Language** to choose from the available options as a Premium Edition subscriber.



Getting Started with Scanning

4.1 Scan a Business Card

Launch the mobile app and select the business card scanning module on the home screen as highlighted below.

Step 1

Place a business card in the newly featured *Smart Frame*. You can select which image orientation to best capture your business card on the top right corner of the screen.

Step 2

To take a photo of the business card, tap on the **Capture** button.

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.

Step 3

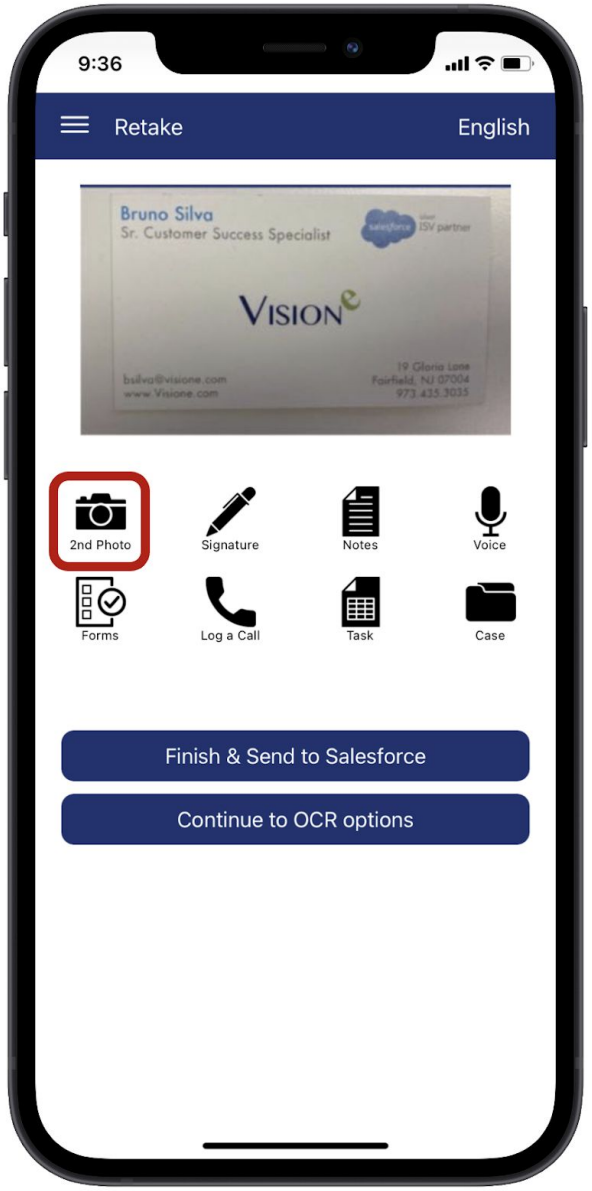
You'll then be able to apply Premium Add-Ons to your captured photo from 2nd Photo to Logging a Call.

Note: System Administrators can modify which Add-Ons your user(s) can have access to by navigating to the Mobile Scan Builder's Options menu and simply toggle each add-on switch to enable or disable.

To review the Add-Ons available on this step, please note the following:

Secondary Picture

Capture information on the back of a business card or take a photo of a competitor product, location, person, etc. to attach to your card. Select the **2nd Photo** option below the Premium Add-Ons headline on your screen to take an additional image with your card as shown below.



Once you've captured the image, a checkmark will appear next to Secondary Picture. To view the captured image, tap on **2nd Photo** and a pop up will appear with a thumbnail of the image as shown below.

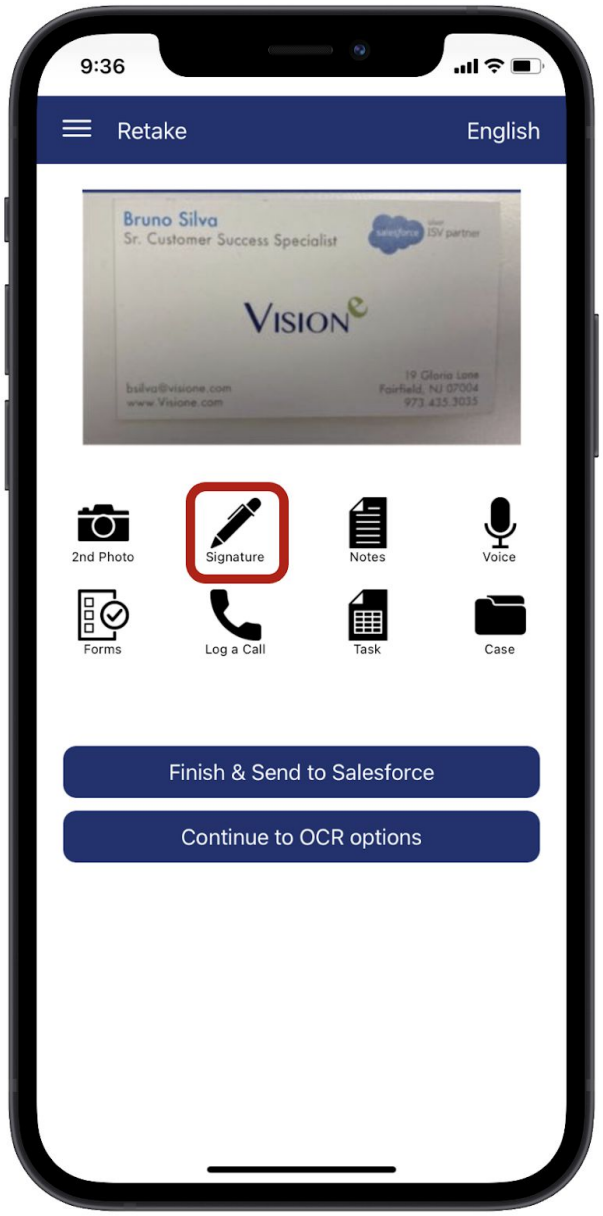
If you wish to retake the photo, tap on **Recapture**.

If you're content, tap on **Close** to navigate back to the previous screen.

Compliance Consent (Signature)

This Premium Add-On allows users to gather an individual's signature which could be vital in closing an on-going sale cycle once you've won the opportunity in that exact face to face meeting.

To access this feature, simply tap on the **Signature** option under your Premium Add-Ons headline as shown on the next page.



When ready, a blank canvas will appear on your screen allowing the user to capture the signature at that very moment.

To cancel your actions, tap the Back button. If you're content with the signature, tap on Save.

If you wish to start over, tap on Reset.

Note: It is illegal to obtain someone's consent making Scan your liable solution for a legal process by having the signee *Agree* to consent in a single, flawless motion from the same screen below the signature line.

Notes, Tag & Mentions

By selecting the Notes as shown on the next page, users can add notes, mention or tag co-workers upon creating a Lead or Contact, or include Hashtags (#) with your card.

Here's what to expect with Notes, Mentions & Tags:

- Notes - Type within the Notes field to enter reminders, messages or important details from your meeting vital to the sale cycle. The completed note will appear with the Lead or Contact record in the *Description* field.
- Include Mentions - Select LookUp to mention a coworker upon creating the new Lead or Contact. Select Search to search the name of your colleague you wish to notify. Select the name when it appears.
- Include Tags - To add a hashtag (#), click inside the Add # Tags Here field and type the hashtag topic you wish to use. Press the plus sign (+) to add the tag.

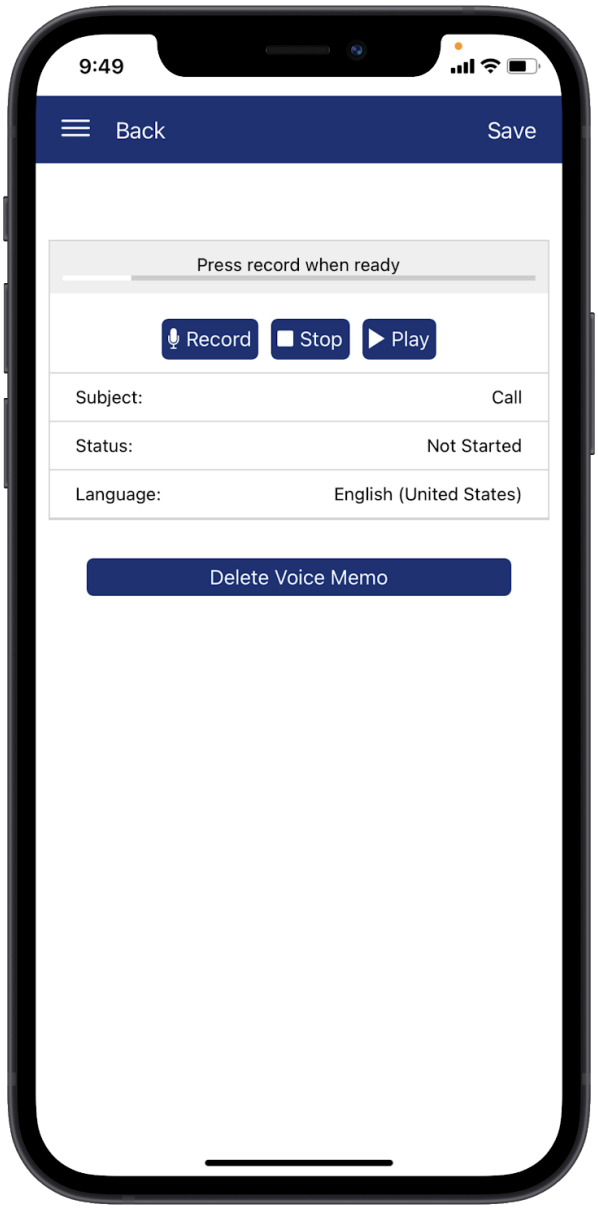
After you add your *Notes, Mentions, and Tags*, click **Done** to return to the previous screen.

Record Voice

Record a voice memo to go with your card by selecting the **Record Voice** option from the Premium Add-Ons list shown below.

Once selected, you will have the opportunity to record a voice memo up to 30 seconds by tapping on the Record button.

It is recommended to keep them below 15 seconds for a quicker upload time. If at any point you wish to stop recording, tap on the Stop button.



After recording the memo, you have the option to include a *Status*, *Subject and/or Language*. Select **Save** when done or tap on **Back** to return to the add-on screen.

Tap on **Delete Voice Memo** if you wish to undo your recording and return to the previou screen for your add-ons.

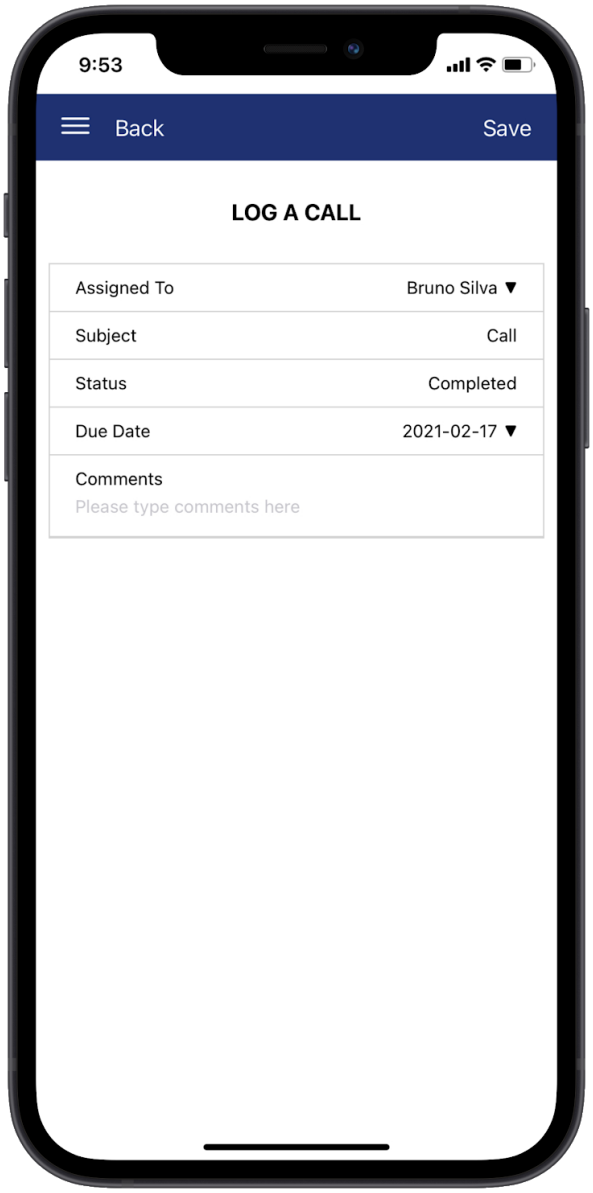
Forms

Please refer to Section 6.0 of the Scan User Guide for further information.

Log a Call

Now that you've collected your scan, you'll be able to create a logged call activity within Salesforce using Scan by tapping on the **Log a Call** icon.

Once you've tapped on the icon, users can edit the information to be displayed within Salesforce from *Subject, Assigned To, Status, Due Date and Comments* as shown in the screenshot below.



Log a Task

After tapping on the Task icon, users will be able to create a new task or event within their Salesforce Organization by tapping on the Task add-on icon.

You'll be able to access your New Task Detail fields from *Status* to *Description* next.

Case

If an immediate assistance is required for the new Contact or Lead you're about to upload into Salesforce, then look no further than the Case Premium Add-On available through the **Case** icon.

After tapping on the Case icon, you'll be presented with fields to include additional information from *Case Reason* to even adding a vital *Description* for clarity within a few seconds using Scan.

Make sure to tap on **Save** when done.

4.2 Select OCR Language

Optical Character Recognition (OCR) is the primary advantage in using our Scan application's Premium Edition. OCR allows our app to scan your business cards and obtain the required data such as name, email, etc. with Scan supporting up to 27

different languages with the Premium Edition services. Users must first scan a card before selecting a language. For help scanning your business card, see Section 3.1

Step 1

After you've captured your image and attached your Premium Add-Ons, tap the English option on the upper right corner as shown below.

Step 2

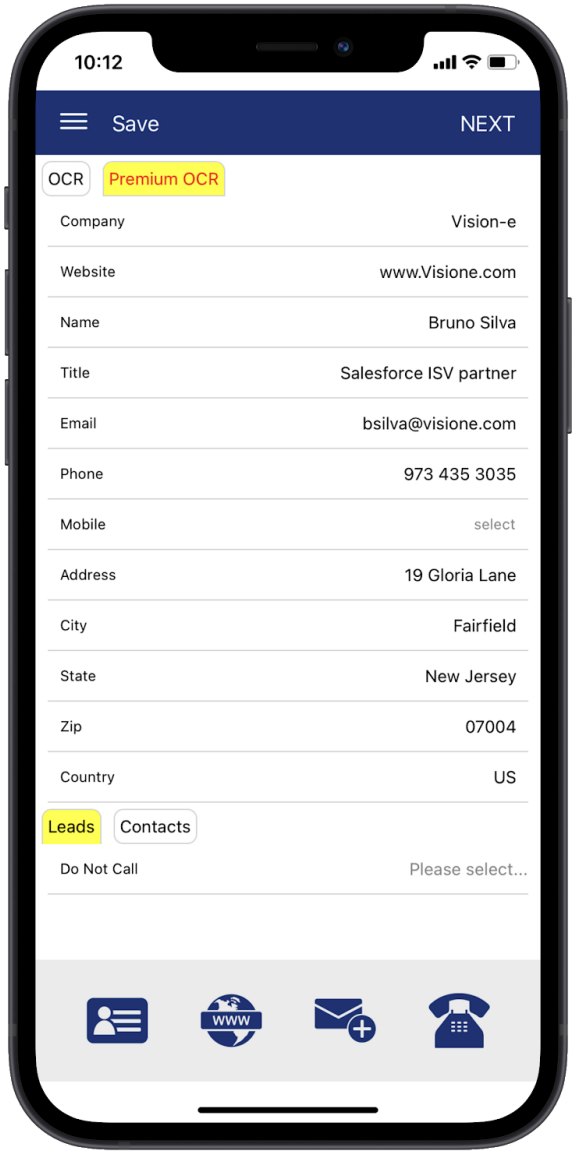
Select the language of your choice from the provided drop down menu.

Step 3

When done, tap **Save** in the upper right corner of your screen.

4.3 OCR Results

Once you applied the Add-Ons of your choice, select the **Continue** button to access your scan results within a few seconds as shown below:



From the Results screen, users can take several action items at the bottom. To understand what each of these buttons can do, please note the following:

Business Card
The first button will provide users with a quick view of the captured business card.

Website
This second button will navigate users to the website gathered from the business card if one is present. This will be a fantastic method of capturing any additional information if needed.

Send Email
By selecting the third button, users will be able to compose an email right from their smartphone with the address captured from the business card being the recipient. This will invoke an immediate follow up to your face-to-face conversation showing a prompt attention from your workforce.

Call
The fourth and final button will allow your Scan users to contact the phone number gathered from the captured business card.

When done, tap on the **Next** option located on the upper right corner of your screen for the final step of uploading your scanned business card into Salesforce!

4.4 Upload to Salesforce

With your business card captured and all Premium Add-Ons applied to the card, you've reached the final stage of your upload(s). You'll now be able to select how to upload your captured business card into Salesforce.

Saved as a Lead
Tap on the **Save as a Lead** button to create a new Lead record based on the captured business card, its scanned data and the included Premium Add-Ons.

Saved as a Contact
Tap on the **Save as a Contact** button to create a new Lead record based on the captured business card, its scanned data and the included Premium Add-Ons.

4.5 Scan to Queue

Not ready to upload your captured business card to Salesforce as a Lead or Contact? No worries!

This feature allows users to upload their captured cards into the Scanning Queue, which acts as a state of limbo for your uploads allowing you to determine your next steps at a later time.

Send to Queue

When ready, tap on the Send to Queue button to upload your captured business card data to the Scanning Queue.

Accessing the Scanning Queue

Navigate to Section 3.10 below for step-by-step instructions on how to access your Queue from your mobile smartphone device and/or desktop.

4.6 Rapid Fire Image Capture

Do you have hundreds of business cards gathering dust on your desk and want to just throw them into Salesforce quickly? This feature will accomplish exactly that.

Step 1

You'll first need to enable this feature from your Scan mobile app. First, tap on the Menu (three horizontal lines) in the upper left corner of your screen and choose Settings.

Step 2

Next, tap on App Settings. Turn ON the *Rapid Fire* switch then tap Save when done.

Note: When scanning using this feature, you will NOT be able to access the features available on the upload/enhancements screen such as Notes.

Step 3

Navigate back to the Home screen. When there, continue to scan a business card by tapping on the *Business Card* module and start uploading those stacks of business cards!

4.7 Scan Cards Offline

Whether you're stuck in a train or out in the middle of nowhere away from the closest cellular phone tower, Scan users will be able to store any gathered business cards right from the mobile application while waiting for a better connection.

You can view pending cards within the mobile application's side menu by tapping on the three horizontal lines in the upper left corner then select **Offline Queue**. This is where all of your cards await to be uploaded.

4.8 Scan QR Codes

To assist with obtaining QR encrypted data (as long as it's accessible) Scan has not one, but two separate modules for QR Codes for its users and they are as follows.

QR Reader Module

This module allows you to obtain any generic, third party QR Code that you would normally find on attendee badges during a conference, such as Salesforce's Dreamforce.

Step 1

Launch the mobile application and select the **QR Reader module** on the home screen.

Step 2

Next, you may or may not be asked for the app to access your camera. If so, choose **Allow** to continue. When ready, position your phone to capture the QR Code clearly.

Step 3

The link or text will be provided within the capture guidelines as a quick preview. Once you've captured the QR Code, the next screen will provide you with the scan results with *Name* and *Company* being required before selecting **Next**.

Note: Certain conference or trade shows provide QR Codes that may be protected from third party scanning apps, such as Scan, obtaining the encrypted data within each QR code.

Step 4

You'll be able to select your next steps from saving the scanned QR results as a Lead or Contact within Salesforce or Send to Queue for a review/upload at a later time. Users can attach any Premium Add-Ons by tapping on the respective add-on icons from Secondary Picture to Record Voice Memos.

Step 6

When you're done, you can choose to save the QR Code to your rolodex by tapping on **Save** or if you wish to upload the QR Code to Salesforce, tap on **Finish & Send to Salesforce**.

QR Code Module

The **QR Code** module is utilized to read the QR code generated using the Scan app's VCard feature which you can learn more about by visiting **Section 8 - My VCard**.

4.9 Scan Driver's License

As the latest capability offered to all Scan Users, your workforce will now be able to scan and obtain data from the audience's Driver's License, no matter the state.

Step 1

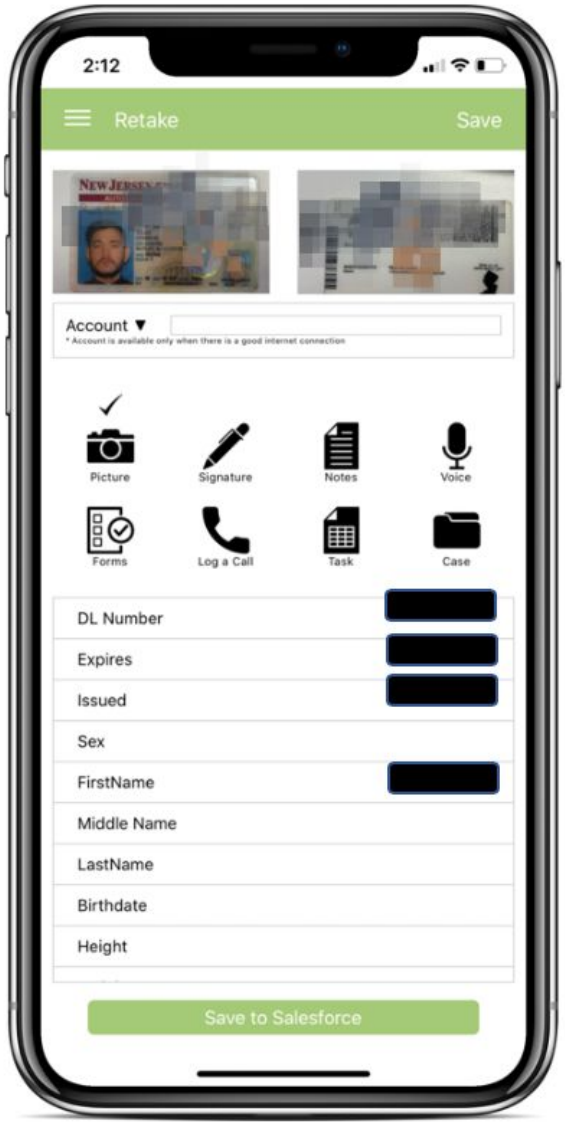
Launch the mobile application and select the **Driver's License** from the home screen.

Step 2

You may or may not be asked for the app to access your camera. If so, choose **Allow** to continue. Position your phone to capture the Driver's License clearly, including the barcode on the license ID.

Step 3

Once you've captured and approved your image(s), you'll be presented with a snapshot of all captured data from License Number, Sex, Full Name and so forth.



Step 4

Users will be able to attach any Premium Add-On from a *Signature* to a *Voice Memo* by tapping one of their respective add-on icons.

Note: It's important to note that your scanned Driver's License will create itself as a new record within your Salesforce under the **Driver's License** custom object.

Step 5

If you wish to attach the soon to be record to an existing *Account, Contact* or *Lead* within Salesforce, tap on the **Account** dropdown menu highlighted below.

Step 6

After selecting your object, tap in the *Search* field and begin to type the record of your choice. Each typed letter will present search results based on those keywords.

Step 7

Once you've selected your record, tap **Save** on the top right corner or **Save to Salesforce** below.

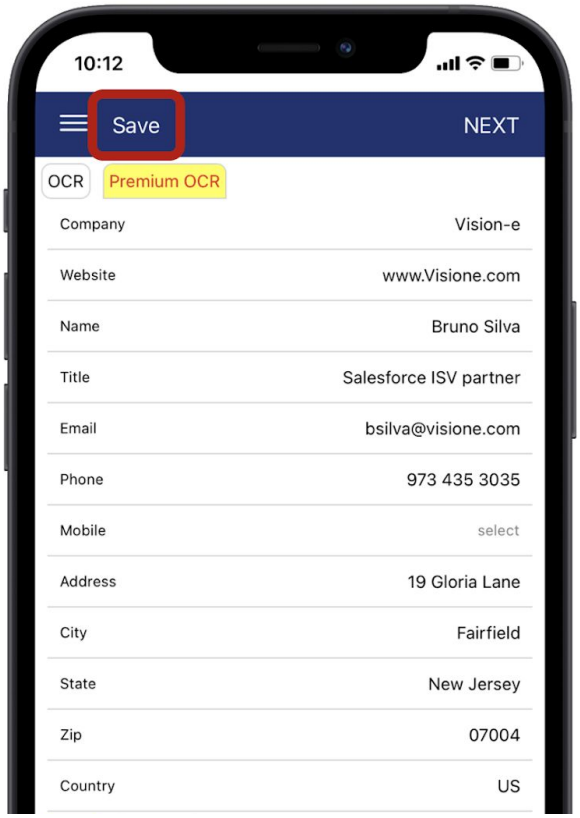
Step 8

If you wish to locate your newly uploaded record, search for the Driver's License object as shown below.

Note: If you opted to apply the Driver's License record to an existing Account, Contact or Lead, you'll need to make sure the Driver's License related list is added to the Page Layout for easy access.

4.10 Access My Rolodex

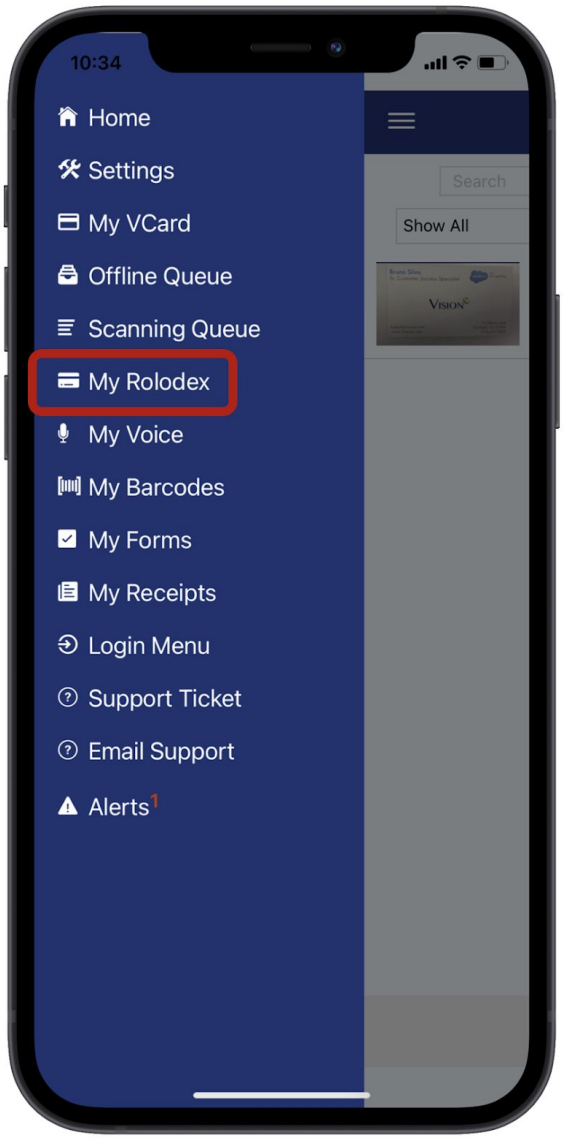
When Scan users opt to save their uploads, whether business cards or QR codes, by tapping on the Save option in the upper right corner of the screen as shown below, the upload job is saved to your Rolodex.



Follow the steps below to access your Rolodex from the Scan mobile app:

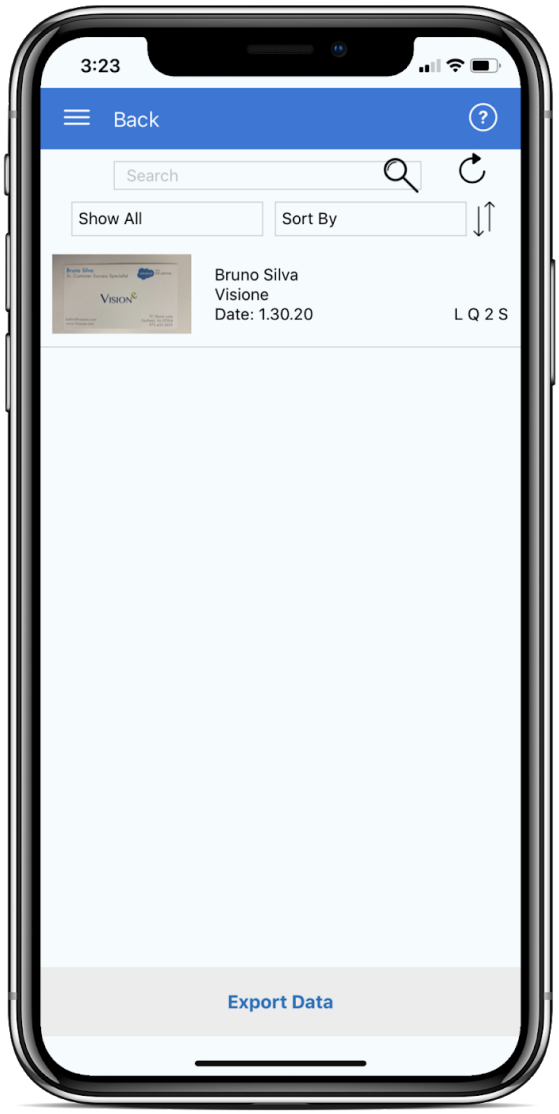
Step 1

Access your side menu by selecting the three horizontal lines on the upper left corner of your screen. Next, tap on **My Rolodex** from the menu options.



Step 2

From your Rolodex, users can **Search** for captured data and even **Sort** based on particular criteria.



This will allow you to access vital information you've captured in the life span of being a Scan subscriber.

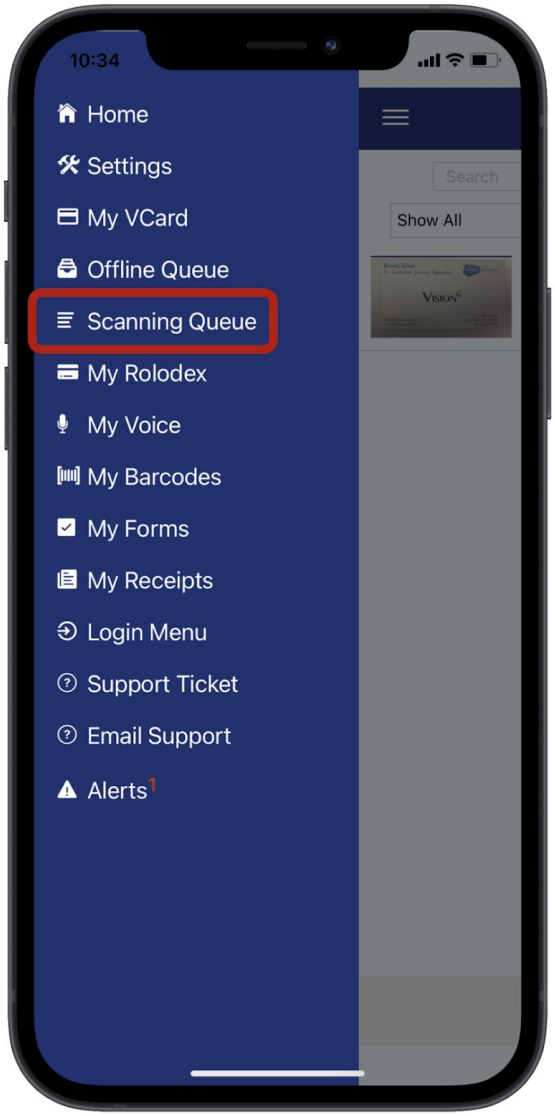
Tap on any of the listed options to be brought directly to the OCR captured results from the palm of your hands.

4.11 Scanning Queue from Mobile

If Scan users have opted to view their captured scans at a later date, they will be waiting within the Scanning Queue. The below steps will show users how to access these uploads in a state of limbo right from their Scan mobile app.

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 are awaiting your approval. You'll be able to view the captured data from both a Lead or Contact perspective by selecting their respective tab.

Step 3

Once you're ready to create the card as a Lead or Contact, tap on the **Create Lead** or **Create Contact** green button at the bottom of their respective Queue Form.

Note: Users can access their Scanning Queue from a desktop device by logging into Salesforce.com using their login credentials.

Salesforce Scanning Queue

5.1 Find Business Cards in Salesforce

If Scan users have opted to view their captured scans at a later date, they will be waiting within the Scanning Queue. To access your uploads waiting within the **Scanning Queue** from your desktop web browser, please note the following steps:

Using Salesforce Classic

Step 1
To access the Scanning Queue, log into Salesforce and click the plus sign (+) located on the far right of your tabs.

Step 2
Next, locate and click the Scanning Queue option under all Available Tabs.

Step 3
All scanned cards will appear on this page as well as any attached enhancements below the image. You can edit/review the information populated within the Lead or Contact form prior to creating them as a Lead or Contact.

Step 4
To add the Scanning Queue to the top of your tabs for easier access, click the plus sign (+) once more and select the **Customize My Tabs** button.

Step 5
Select the Scanning Queue from the **Available tabs** list. Click **Add** and then click **Save**.

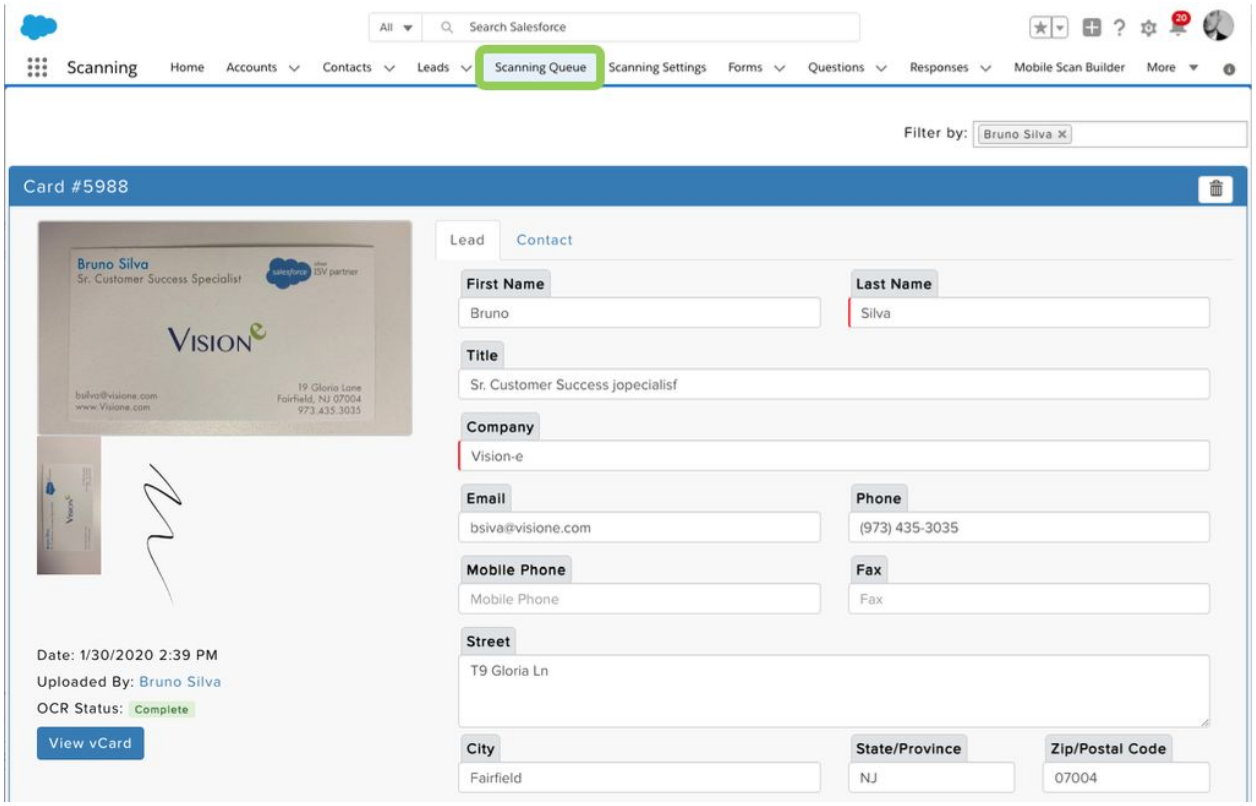
Note: For further assistance on uploading your scanned results into Salesforce, please note Section 4.3

Using Salesforce Lightning

Step 1
Log into Salesforce and open your **App Launcher**.

Step 2

Click on the Scanning App.
Once the page loads, click on the **Scanning Queue** tab to access your pending uploads from the Scan mobile app.



Step 3

Once you're ready to create the upload as a Lead or Contact, tap on the **Create Lead** or **Create Contact** green button at the bottom of their respective Queue Form.

Note: For further assistance on uploading your scanned results into Salesforce, please note Section 4.3

5.2 Filter Cards in Salesforce Scanning Queue

Within the Salesforce Scanning Queue, you can choose which uploaded cards to view through a filter process.

To do so, please note the following steps:

Step 1

Click inside the **Filter By** field at the top right corner of the Scanning Queue to select how you would like to filter cards.

- **Me:** You will only see cards uploaded by you in the Scanning Queue that have not been processed.
- **Everyone - Select All:** You will see cards uploaded by everyone in your Salesforce.com Organization that have not yet been processed.
- **Only These Users:** You will see cards uploaded by specific users in your Org. View multiple user's cards by repeating the process of clicking inside the Filter By field and selecting their name(s).

Note: For the Select All and Only these users options, you will not see the names and cards of all users within your Salesforce org, only those who have uploaded cards in the Queue will be visible and listed.

The ability to view another user's cards is based off of Salesforce role hierarchy rules, which impacts which users and cards you can see. If you do not have access to a user within Salesforce, you cannot view or process their cards in the Scanning Queue.

Note: If you do not see the *Filter By* field in your Scanning Queue, make sure you are using the most up to date version of the Scan app.

5.3 Create Contacts or Leads

Create Salesforce Contacts or Leads within the Scanning Queue. For help on locating the Scanning Queue, see **Section 5.1**.

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! Your enhancements will be attached to the corresponding Lead or Contact record.

5.4 Merge & Duplicate Handling

Duplicate records are checked when attempting to process a Lead or Contact based on fields you identify in the Scanning Settings.

Step 1

When creating a Lead or Contact that has a duplicate within your Salesforce, you will have the option to View, Merge or Duplicate the record for that business card.

Step 2

After selecting Create Lead or Create Contact, if there is a duplicate record, a pop-up will appear with the following three options:

- View: Opens a new page to view the information on the duplicate Lead or Contact record.
- Merge: This functionality works similar to Salesforce's Merge action item allowing users to choose what duplicate(s) to select/update the field(s)
- Duplicate: Create another Lead or Contact record in addition to the existing one.

Note: If your Salesforce.com Organization does not allow duplicates with an already existing rule created, we adhere to those rules so that no duplicates will be created.

5.5 Recover Deleted Business Cards

If you delete a business card in your Scanning Queue, you can recover it from your Recycle Bin.

Step 1

Log into Salesforce.com and from the Home page, on the left sidebar menu, click the Recycle Bin icon. If you do not see the menu, you may need to expand it.

Step 2

The deleted card will be named the Card ID number. Select the check box next to it and click Undelete. Your card will return to the Scanning Queue.

Forms

Ever exchange business cards with an individual while networking and realize you forgot to ask a key question?

Based on user feedback, our Scan users would look for a way to gather additional information outside of what would be listed on an end user's business card. Many establishments have a list of predetermined questions they look to utilize in many events where Scan is heavily used, such as Trade Shows, Conferences, and so forth.

Having the ability to not only flawlessly gather their business cards, but also obtain additional information on their level of interest, pain points to resolve, financial opportunity, and so forth makes Scan the ideal tool for any employee.

6.1 Creating Forms in Salesforce

Before Scan users are able to take advantage of Forms on their Scan mobile app, you will need to create active Forms within Salesforce first. To do so:

Step 1

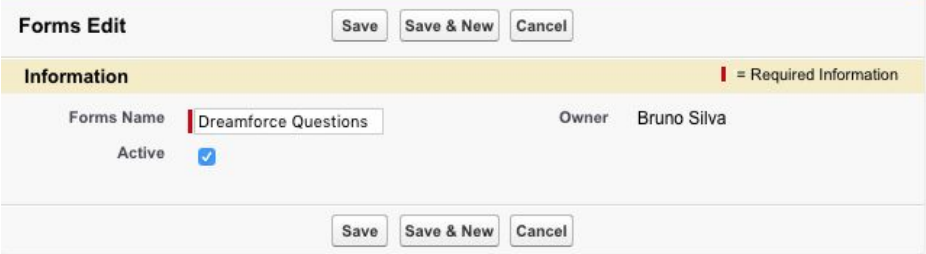
Access the Forms tab by clicking the plus sign (+) on the top of your Home Tabs to access **All Available Tabs** or click on the **App Launcher** menu on the top, right corner of your screen.

Step 2

Once you've navigated into the *Forms* object, click the **New** button to begin.

Step 3

Next, provide your Form with a *name* and set it as **Active** as shown below.

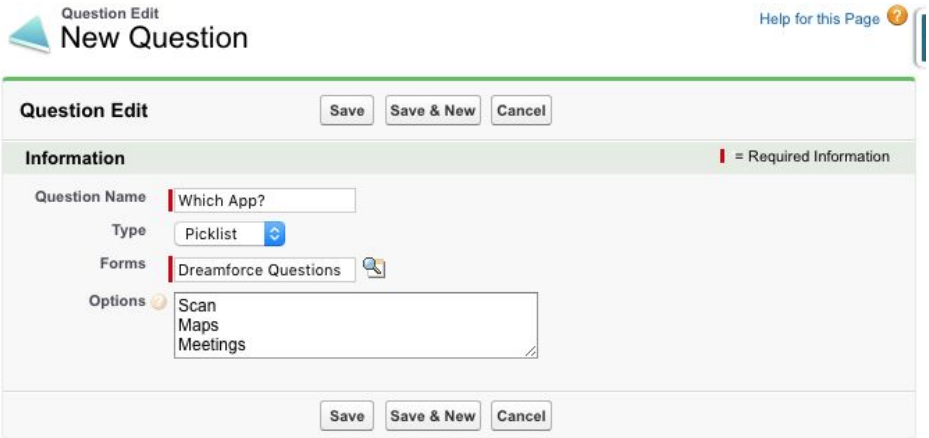


Step 4

You will then be able to start adding your Questions that you would want to appear within the Scan mobile app by clicking on **New Question**.

Step 5

Next, type the **Question Name**, choose if the question will be a *Text* or *Picklist* under the **Type** field, and lastly, include your responses within the **Options** field as so:



Step 6

When done, click on the **Save** button. If you wish to save your existing Question and create a new one immediately after click Save & **New**.

Step 7

Make sure to confirm all created Answers. Your active form(s) will appear within the mobile Scan app upon scanning your next business card!

6.2 Requirements

Forms are only available to any Scan package version 1.330 or above. To confirm you have a supported version, please reach out to your System Administrator for further assistance.

6.3 Access Active Forms on Mobile

Once your Forms have been created and activated within Salesforce, there are two methods on accessing your Forms from the mobile Scan app. For step by step instructions on how to access this feature, please note the steps below.

Standalone Forms

Step 1

From the Home screen of your Scan app, tap on the **Forms** module as shown below.

Step 2

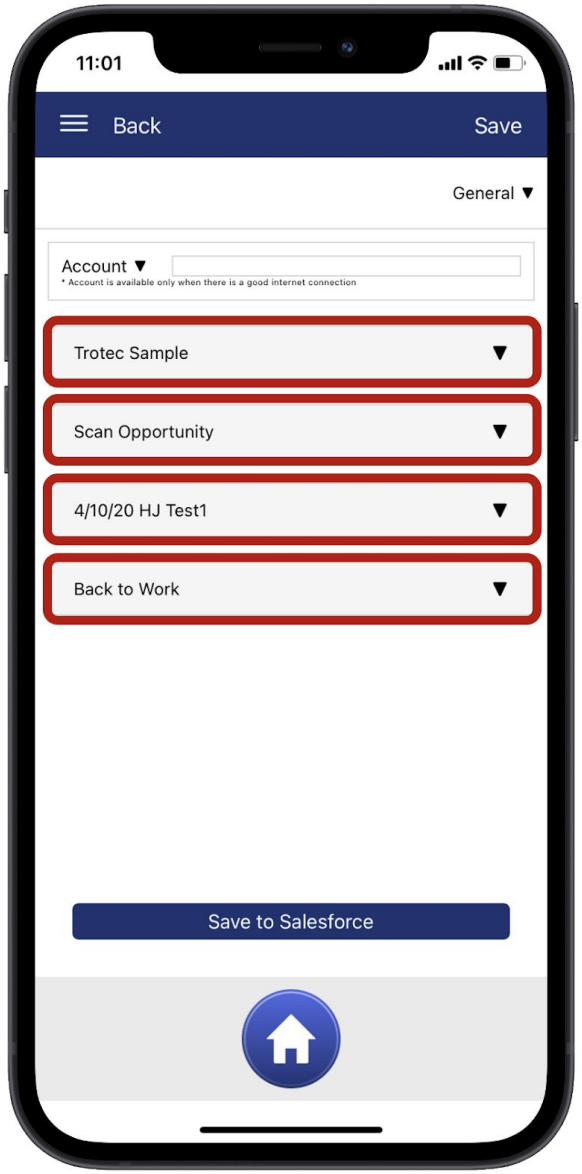
Users will be able to attach a Form to an existing Account, Contact or Lead in their Salesforce. To do so, tap on the Account drop down menu and choose one of the three options.

Step 3

Once you've selected the Object type (i.e. - Account, Contact or Lead) tap on the Search field and lookup the record of your choice.

Step 4

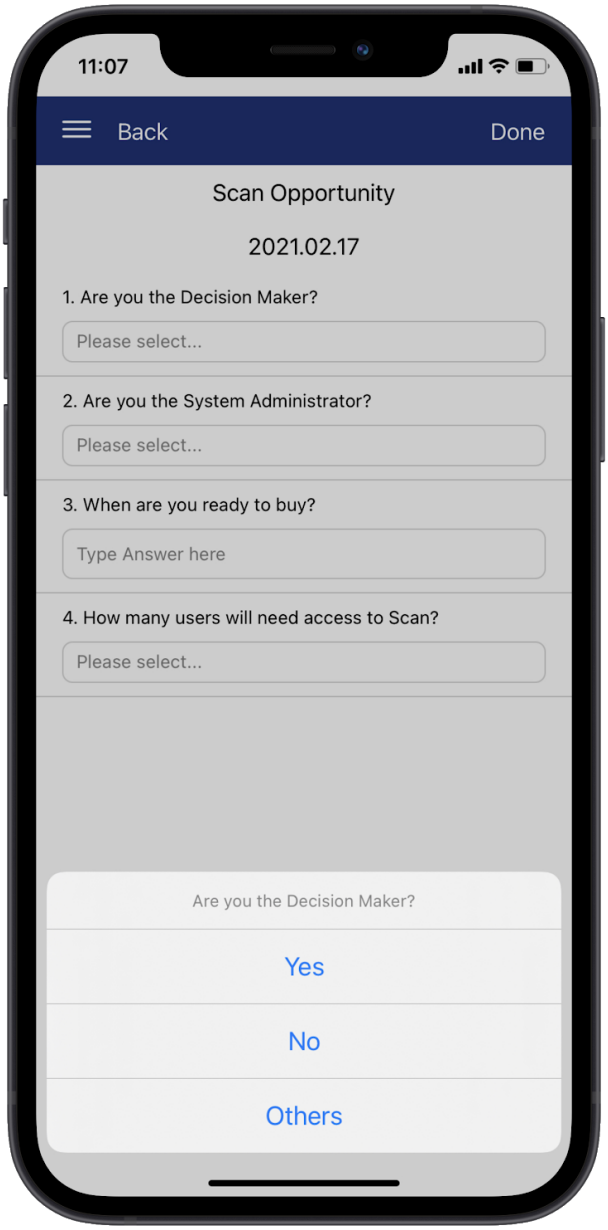
Next, choose the Form of your choice from the drop down menu.



Note: By clicking the *General* dropdown option on the upper right corner of your app, users can access any Compliance Consent form(s) to ensure all parties are in sync with being asked certain questions

Step 5

The next step will be to go through the provided questions from your form to obtain any vital information from your audience.



Step 6
Tap **Done** once the form has been completed in full.

Step 7
On the next screen, tap **Save to Salesforce** when you're content with the information you gathered. Jump to *Section 7.4* on how to access your completed Forms.

Forms Premium Add-On

Step 1
After capturing a photo of your desired scan, no matter the scan type, you'll be able to access all active Forms under your *Premium Add-Ons*, by tapping the **Forms** icon.

Step 2
On the next screen, select the form of your choice.

Step 3
After you've completed the selected Form with the end user or users, make sure to tap on Save to attach the completed form to your upload.

Note: Form Responses are captured in a native, separate object within Salesforce allowing you and your users to create Reports based on the responses!

6.4 Access Completed Forms

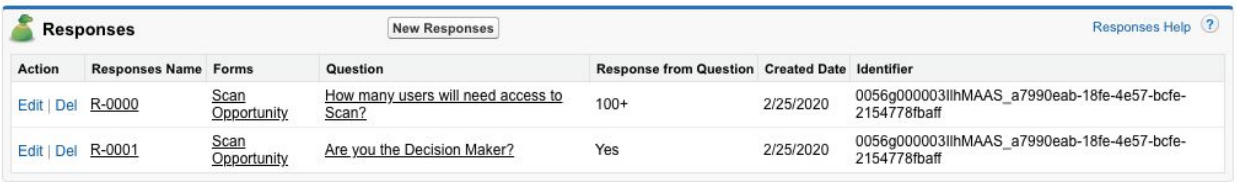
Once your Forms have been completed and submitted to Salesforce, there are two ways to access its Responses.

Existing Account, Contact or Lead

If you attached the Form to an existing Account, Contact or Lead, consult with your System Administrator to confirm the Responses Related List has been added to the object's Page Layout.

Step 1
Log into your Salesforce.

Step 2
Search for the record attached to your completed Form. Once located, scroll to the Responses related list as shown below.



Responses | New Responses | Responses Help

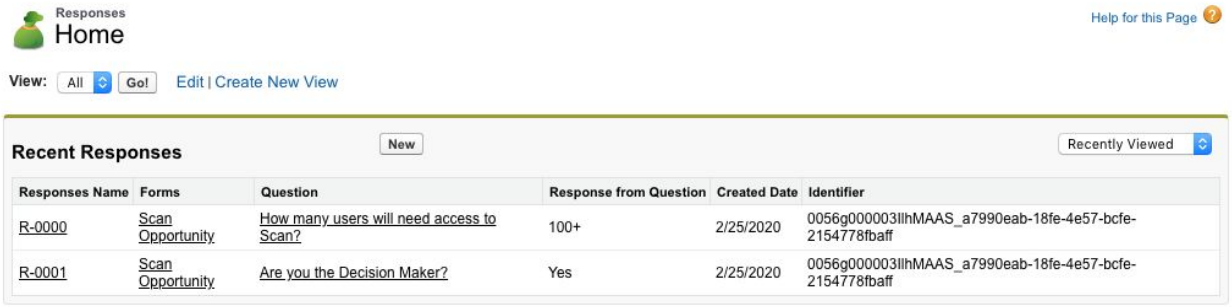
Action	Responses Name	Forms	Question	Response from Question	Created Date	Identifier
Edit | Del	R-0000	Scan Opportunity	How many users will need access to Scan?	100+	2/25/2020	0056g000003IlhMAAS_a7990eab-18fe-4e57-bcfe-2154778fbaff
Edit | Del	R-0001	Scan Opportunity	Are you the Decision Maker?	Yes	2/25/2020	0056g000003IlhMAAS_a7990eab-18fe-4e57-bcfe-2154778fbaff

Step 3
Click the **Response Name** to access a full overview of that particular Question/Form.

Standalone Form Submission
If the Form is not attached to an existing record, Scan users can access the submitted Responses by following the steps below:

Step 1
Log into Salesforce from your desktop or mobile device.

Step 2
Navigate to the **Responses** object where you'll be able to access Recent Responses, search through existing list views or even create new views.



Responses Home | Help for this Page

View: All | Go! | Edit | Create New View

Recent Responses | New | Recently Viewed

Responses Name	Forms	Question	Response from Question	Created Date	Identifier
R-0000	Scan Opportunity	How many users will need access to Scan?	100+	2/25/2020	0056g000003IlhMAAS_a7990eab-18fe-4e57-bcfe-2154778fbaff
R-0001	Scan Opportunity	Are you the Decision Maker?	Yes	2/25/2020	0056g000003IlhMAAS_a7990eab-18fe-4e57-bcfe-2154778fbaff

My VCard

In an effort to produce a safe, germ-free environment for your workforce, Vision-e's Scan application has introduced the My VCard feature for your Scan users allowing for a touchless experience on how you network today.

7.1 Setup My VCard

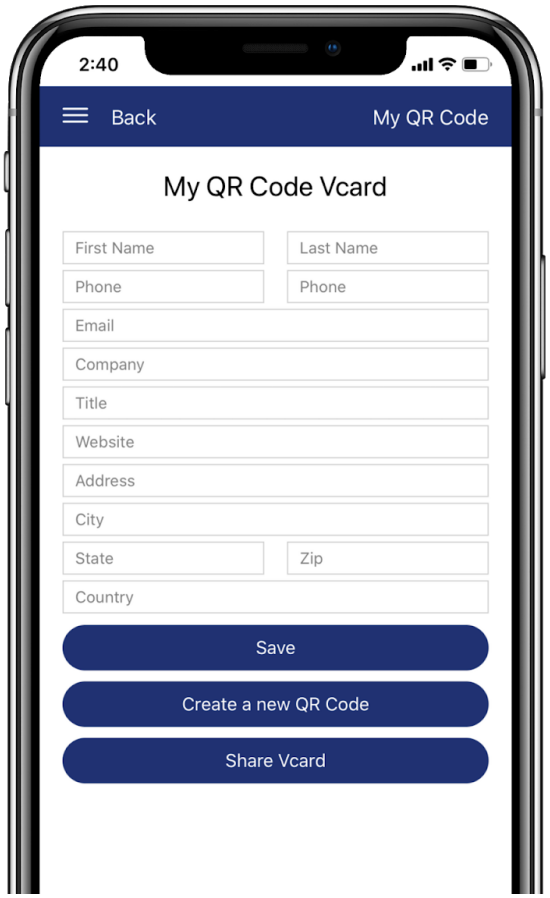
Before you can begin sharing your virtual business card (VCard) your Scan Users will need to complete the below steps to get started:

Step 1

Launch the Scan mobile solution on your smartphone device. Access your side menu and tap on My VCard.

Step 2

Complete the fields within the *My QR Code VCard* to create your QR Code VCard.



Step 3
Tap **Save** when done.

7.2 Share My VCard

Once you've created your VCard, it's time to do some touchless networking right from your Scan mobile app. You can either share your **VCard Contact Card** or share your **VCard QR Code**.

Share My VCard QR Code

You can generate a QR Code out of your VCard if you wish to encrypt your data into a more secure fashion. To do so, please note the steps below:

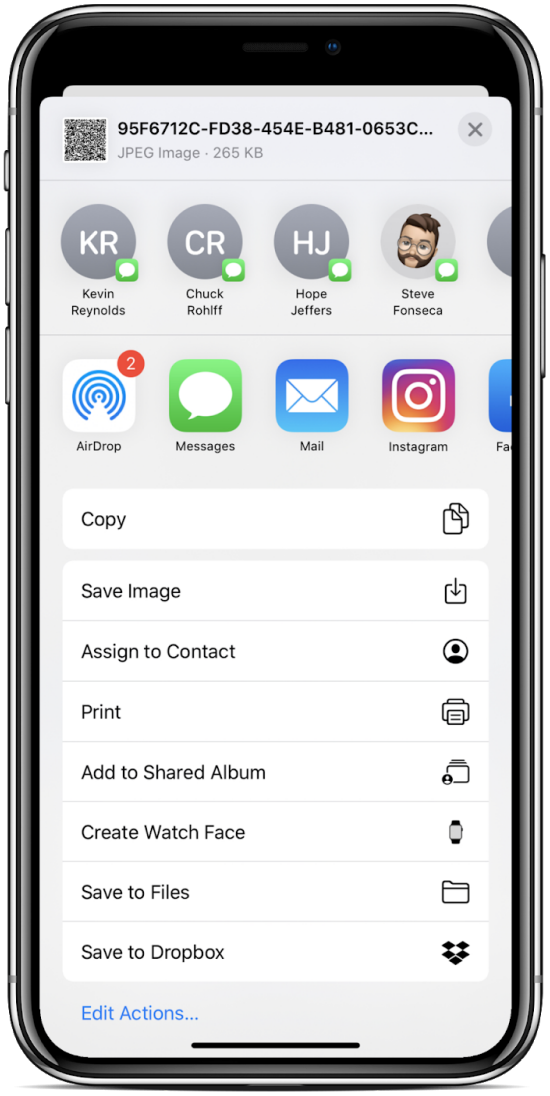
Step 1
From the side menu, tap on My VCard.

Step 2
Tap on My QR Code on the upper right corner of the screen.

Step 3
To share your VCard QR Code, tap on **Share QR Code**.

Step 4

You'll be provided with different options on how you wish to share your VCard's QR Code. For example, you can include the QR code into a text message, email and even using AirDrop to connect with other users nearby.



Share My VCard Contact Card

The second method in sharing your VCard will be through a Contact Card which could be utilized to automatically store your information as a Contact List within the end user's mobile device within seconds.

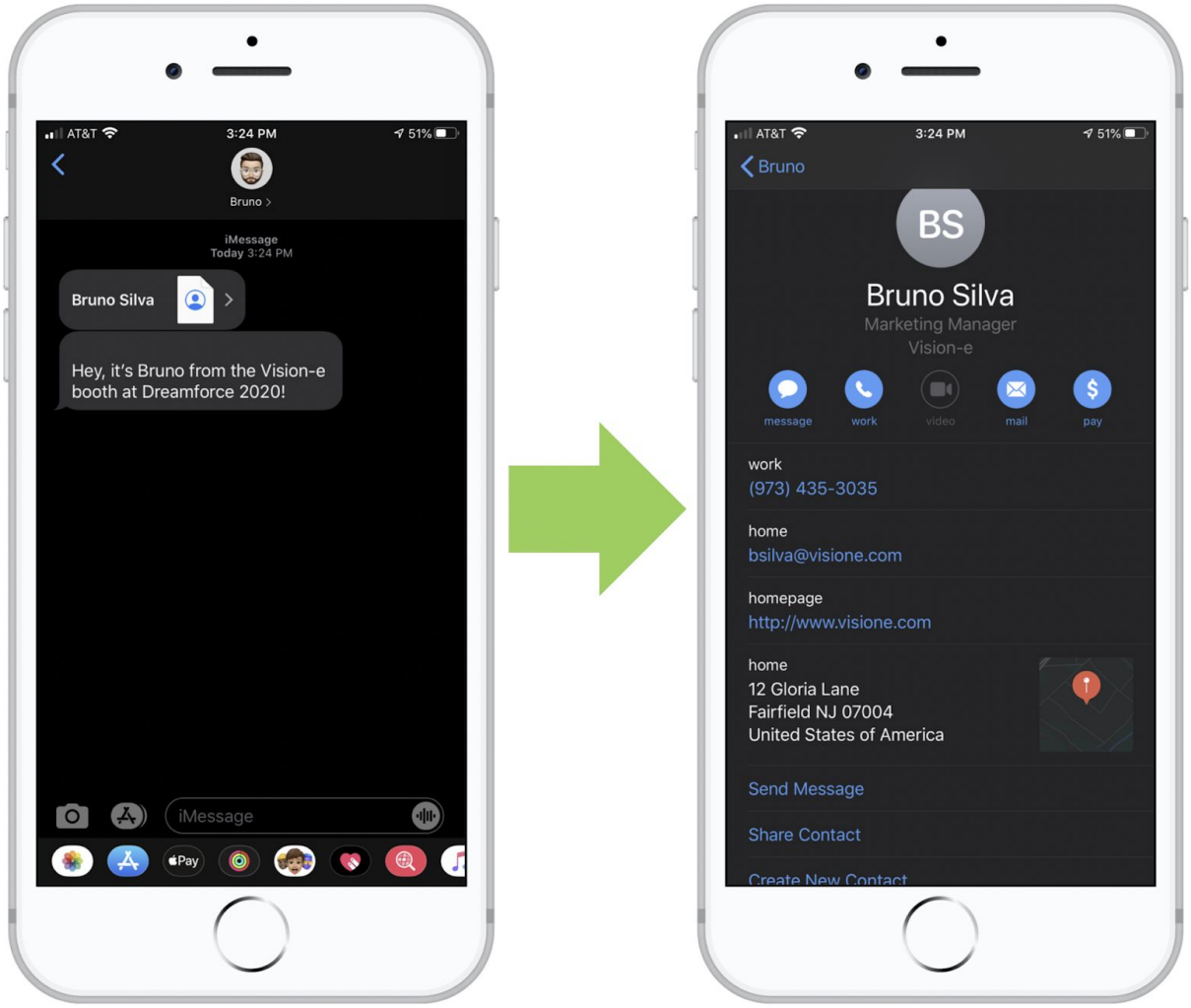
Step 1

From the side menu, tap on My VCard.

Step 2
Tap on the Share VCard button at the bottom of your screen.

Step 3
You'll be able to select how you wish to distribute your VCard Contact record from AirDrop to Email and even communication apps such as WhatsApp and Slack.

Step 4
By including your VCard in a composed message, you can also input a quick message to remind the end user of your meeting or conversation if needed! The end user will then receive your message and automatically add you to their device's Contact List as shown below.



Frequently Asked Questions (FAQs)

Can I add Custom fields to the Scanning Queue Page?

Yes. For paid Premium users, we will add the custom Contact and Lead fields you want to your Salesforce Scanning Queue for you. You can also use the Scan Form Customization doc on our Online Knowledge Base to do it yourself.

Do I require a License for All Users in my Salesforce?

No. You only need a license for the users that need the solution. There is no minimum license requirement.

Do you offer volume discounts?

Yes. To learn more, call us at 1 (888) 611-2679 or email us at Support@Visione.com.

What is OCR?

Optical Character Reader is a service that is able to use text recognition and automated field population to get your data into Salesforce faster. OCR will fill in Lead and Contact fields for you so you don't have to do it manually. OCR also rotates your card to the proper orientation within Salesforce. OCR is included in the Premium edition of the scanning solution.

What languages are supported for OCR?

OCR Recognition languages: Chinese Simplified, Chinese Traditional, Czech, Danish, Dutch (Netherlands), English, Estonian, Finnish, French, German, Greek, Hungarian, Indonesian, Italian, Japanese, Korean, Norwegian Nynorsk + Norwegian Bokmal, Norwegian (Bokmal), Norwegian (Nynorsk), Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish, Swedish, Turkish, Ukrainian.

What mobile devices are supported?

Apple on the App Store, Android on Google Play and Blackberry that have access to Google Play. Install the scanning application on the AppExchange in your Salesforce instance before attempting to use your mobile device.

What's the difference between Free and Premium edition?

The Premium 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, Premium support and more. View the Free vs. Premium comparison chart at visione.com/premium.

Where do I find the business card in Salesforce after I scan from my mobile device?

After you scan a business card from your mobile device, the image is sent to your Salesforce. You can find the card in the Scanning Queue. From the Scanning Queue, you can process the card as a Lead or Contact. See Sections 4.1 and 4.2.

Why aren't the text fields populated?

Text translation requires OCR service which is available within the Premium edition. Check the OCR status on the Scanning Queue. If you have the Premium edition and the OCR Status does not say Complete within a couple of minutes of scanning a card, please submit a case to Support@Visione.com or call us at 1 (888) 611-2679.

Why is the business card in the wrong orientation?

If you have the Premium edition, the OCR server, in addition to translating the card image to text, will recognize the card orientation and properly rotate the business card image.

For more Frequently Asked Questions visit Visione.com/faq-scan or visit the Online Knowledge Base for additional Voice, Language and Admin FAQs.

Help & Support

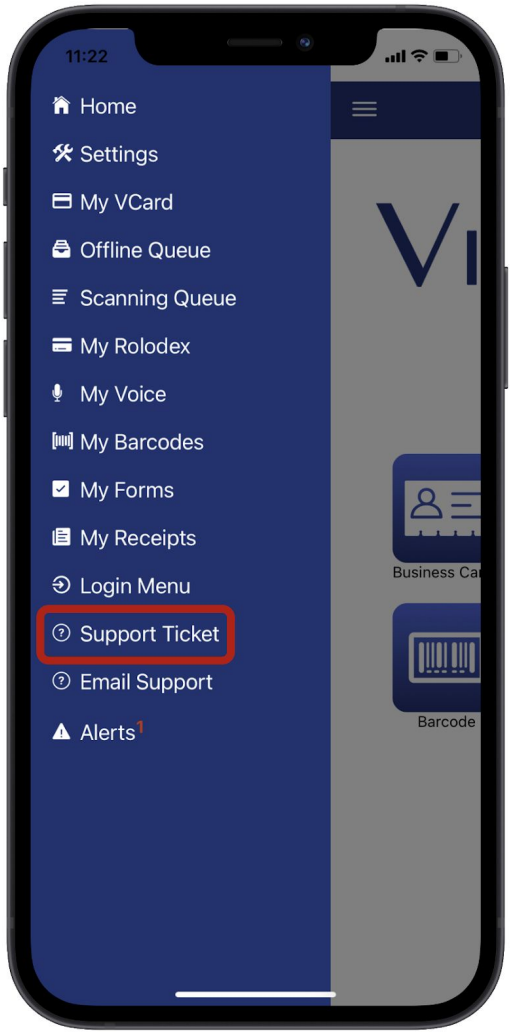
If you or your users are experiencing any concerns and need immediate support from a Vision-e Customer Success Representative, there are two immediate channels within the mobile app; Support Ticket and Email Support.

Support Ticket

This channel will allow you to create and submit a support ticket directly to Vision-e's Help Desk for an immediate response during hours of operation.

Step 1

Go to the side menu on your mobile application and select Support Ticket.



Step 2

Complete the provided fields within the digital form and when done, tap on **Submit**.

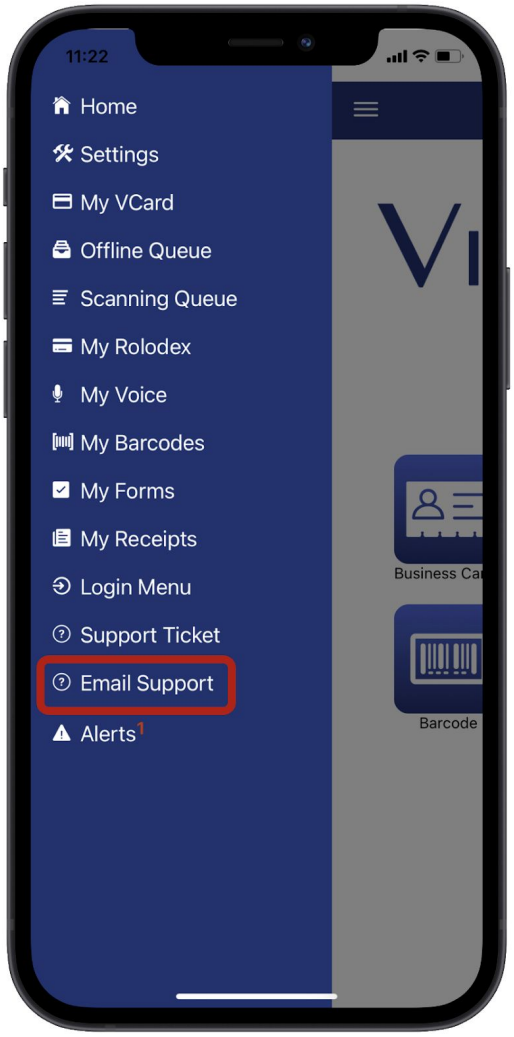
Note: Hours of operation are Monday to Friday, 8 AM to 5:30 PM ET. Please allow up to 1 hour for a Customer Success Representative to review and respond.

Email Support

This channel will allow you or your user(s) to submit an email directly to Vision-e's Support Help Desk with prefilled app details such as version number, username, name and so forth.

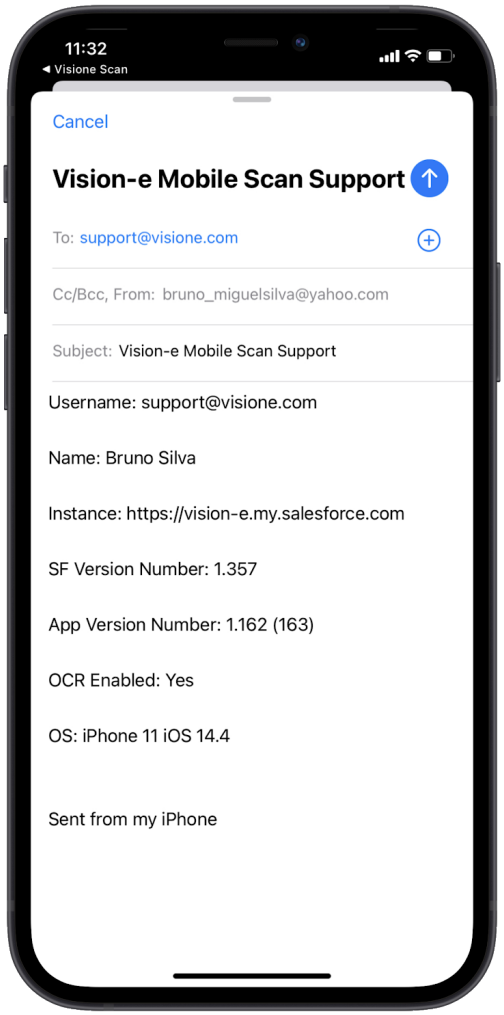
Step 1

Go to your app's side menu and tap on **Email Support**.



Step 2

Once you've reviewed the drafted email, please ensure to tap the Send icon on your smartphone device.



Note: If you wish to go back, tap on **Cancel** located in the upper left corner of your screen.

Additional Support

If you wish to receive additional support, we're here to help! Contact us at:

Email: Support@Visione.com
Toll Free: (888) 611-2679
Website: www.Visione.com

Connect with Us!

For the latest news and updates regarding Vision-e, including our Scan application, feel free to connect with us below:

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