



Salesforce1 Integration

- 1. Follow steps to install the SBC Enterprise managed package
- 2. Go to Setup in your SF org, then choose Customize > Chatter > Settings
- 3. Ensure that Chatter is enabled

Chatter Settings

Turn on Chatter and Global Search features. We have given you a head start-

Enable ☒

- 4. Ensure that Publisher Actions are enabled

Publisher Actions

Add actions you create to the publisher on the home page, Chatter tab, and rec Poll.

Enable Publisher Actions ☒

Edit

- 5. Go to Customize > Chatter > Publisher Layouts
- 6. Edit the Global Layout

Global Publisher Layouts

NewPublisher Layout Assignment

Action	Publisher Layout Name	Created By
Edit Del	Global Layout	salesforce.com, inc., 10/13/2013 3:15 AM

- 7. You will see 2 seemingly identical Actions in the selection box on top, both called “Scan Business Card”.
 - a. It is important to drag the correct one to the list of Publisher Actions below.
 - b. To find the correct one, hover your mouse over each of them, and choose the one that says **“scanbizcards Global_SBC”** (rather than “scanbizcardsAccount_SBC”)

New Lead

New Note

New Opportunity

New Task

Poll

Post

Scan Business Card

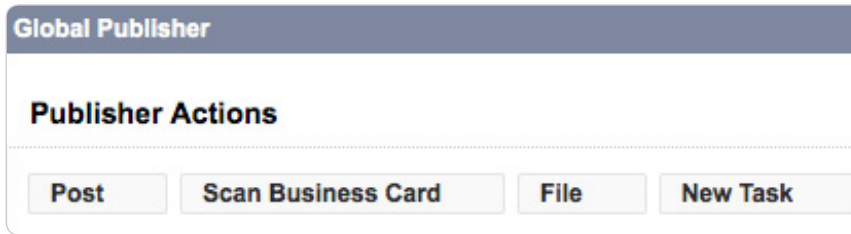
Scan Business Card

Label: Scan Business Card

Name: scanbizcards__Global_SBC

Action Type: Custom Visualforce

8. Drag this action into the list of publisher actions in the position you prefer. There are 2 considerations to bear in mind when selecting a position:

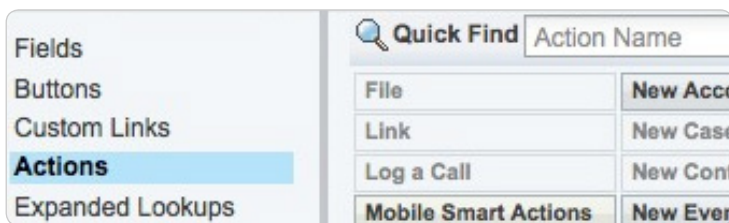


- a. You probably should not put it in the first position, since this is the action that will be open by default in the SFDC web interface when you open the Chatter tab
 - i. This action is inapplicable to the web interface
 - b. The Salesforce1 actions menu can only show 6 tiles at a time, so if you put this action later than the 6th position, you will have to scroll to the next screen before you see it within this menu.
9. Click the **“Save”** button on top

Steps 10—14 are Optional

Follow these steps only if you want the Scan Business Card action to also be available from the actions menu when looking at a particular Account within Salesforce1: Assigning Licenses

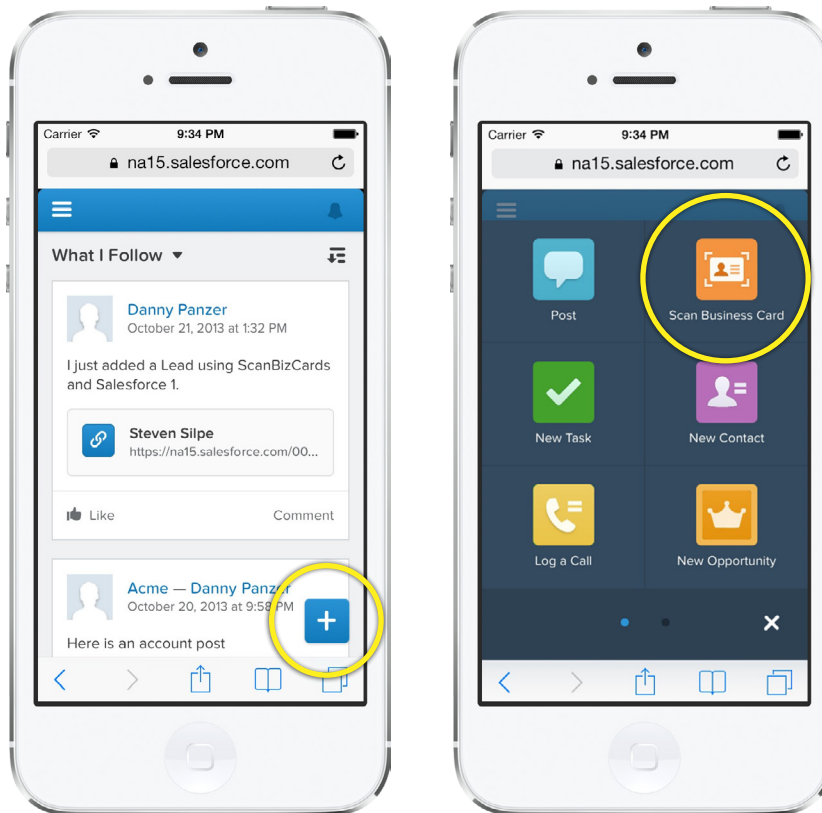
10. Go to Customize > Accounts > Page Layouts
11. Edit the default layout
12. You will see a similar screen to what you saw earlier, but this time you have to choose the **“Actions”** list from the left hand menu



13. This time, hover your mouse over the **“Scan Business Card”** actions and choose the one that shows “scanbizcards Account_SBC”, and drag this to your desired position below in the list of Publisher Actions. The same position considerations as above apply.
14. Click the **“Save”** button on top
15. Now Navigate to: Setup > Develop > Pages
16. Click **“Security”** to the left of SBCFeedLink and SBCAccountLink
17. Add whichever profiles will be using SBC to the list of enabled profiles there.

18. Fire up the Salesforce1 app on your mobile device

- Touch the actions menu that is in the bottom right corner of the home page.
- Verify that the Scan Business Card action is present.
- If you do not see the action, try force quitting the app and restarting it*, then try again.



If You Added the Scan Business Card Action to the Layout for Accounts:

1. Cancel out of this actions menu via the “X” at the bottom right
2. Open the main menu on the top left of the screen
3. Choose Accounts and then click into a particular account
4. Touch the actions menu from the bottom right and verify that the Scan Business Card action is present

How to Force Quit and Restart the App

iOS Instructions:

1. Double tap the iPhone's home button to show a list of running apps.
2. Scroll left so the Salesforce1 app is in view.
3. Drag the screenshot of the Salesforce1 app up so it disappears off screen.
4. Press the iPhone's home button again to return to your home screen.
5. Find the Salesforce1 icon and touch it to restart the app.