



## Installing the Managed Package:

1. Log into your Salesforce account (administrator) on the Salesforce AppExchange.
  - a. <https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4XwXEAV>
  - b. Please install into your production org to utilize the 30 day, 5 seat trial.
    - i. Grant Access to ADMIN ONLY
  - c. **Please Note:** If you install in sandbox, you will not be limited by time or license quota, but data will not be available in production. Simply install in Sandbox, and then follow the app installation instructions below.

**PLEASE NOTE:** USERS WILL STILL NEED TO DOWNLOAD THE MOBILE APP ONTO THEIR RESPECTIVE DEVICES. (\* Unless you use MDM. If that is the case we can provide our compiled code to be deployed through your instance\*)

**Please watch our video on installing the Managed Package:**

<https://www.youtube.com/watch?v=ExAmoJCuZck>

## Assigning licenses:

1. (Admin) Go to Setup > App Setup > Installed Packages
2. Locate "ScanBizCards Enterprise" and click Manage Licenses under the Action column

Quick Find

Expand All | Collapse All

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize
- Create
- Develop
- Deploy

## Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses
<a href="#">Uninstall</a>	<a href="#">Salesforce for Google AdWords</a>	SFGA Build	166.1	SFGA	Active	Unlimited
	<b>Description</b> Salesforce for Google AdWords allows online marketers to track the effectiveness of Google advertising campaigns and website lead generation activity...					
	<a href="#">License Management App</a>	salesforce.com	1.14	sflma	Active	Unlimited
	<b>Description</b> This is the app publishers use to track the different versions of managed packages and the licenses of subscribers who have installed them.					
<a href="#">Uninstall</a>   <a href="#">Manage Licenses</a>	<a href="#">ScanBizCards Enterprise</a>	ScanBiz Mobile	1.2	scanbizcards	Active	5

### 3. Click Add Users in the “Licensed Users” section

Package Details  
**ScanBizCards Enterprise**  
[Back to Previous Page](#)

Package Name	ScanBizCards Enterprise	Publisher	ScanBiz Mobile
Status	Active	Allowed Licenses	5
Expiration Date	Does not Expire	Used Licenses	3

A B C D E F G H I J K L M N O P Q R S T U

**Licensed Users** [Add Users](#) [Remove Multiple Users](#)

Action	Full Name *	Role	Active	Profile
<a href="#">Remove</a>	Moulton, Garth		✓	System Administrator
<a href="#">Remove</a>	Perks, Brian		✓	System Administrator
<a href="#">Remove</a>	Ronan, Thomas		✓	System Administrator

### 4. Search for the users you wish to license and select them and click “Add”

## Creating Permission Set: (NOTE: Users on Professional Edition of SF can skip step 5)

1. Go to Setup > Users > PermissionSet > Add New
2. Name your Permission set something like “SBCEAccess” (so you remember what it is for)
3. In order for your users to have access to SBCE they will need to have the 2 following items enabled
  - a. Access to the scanbizcards.isLicensed Apex Class
  - b. Access to “API Enabled” System Permission
4. For Apex Class:
  - a. Click “Apex Class Access” Under the Apps Header
  - b. Click “Edit” at the top of the screen
  - c. Under “Available Apex Classes” highlight and add the below classes.

Permission Set  
**ScanBiz**

Find Settings... [Clone](#) [Edit Properties](#) [Manage Assignments](#)

[Permission Set Overview](#) > **Apex Class Access** [Edit](#)

Apex Class Name	Installed Package
scanbizcards.BatchAccounts	ScanBizCards Enterprise
scanbizcards.CBConfigService	ScanBizCards Enterprise
scanbizcards.CBCustomSettingUtils	ScanBizCards Enterprise
scanbizcards.CBDependencyCtrl	ScanBizCards Enterprise
scanbizcards.CBRecordTypeCtrl	ScanBizCards Enterprise
scanbizcards.CBSingleRecordTypeCtrl	ScanBizCards Enterprise
scanbizcards.EditSettingsCtrl	ScanBizCards Enterprise
scanbizcards.isLicensed	ScanBizCards Enterprise
scanbizcards.PostInstallClass	ScanBizCards Enterprise
scanbizcards.RecordTypeDepService	ScanBizCards Enterprise
scanbizcards.RecordTypeService	ScanBizCards Enterprise
scanbizcards.SettingsCtrl	ScanBizCards Enterprise
scanbizcards.SettingsService	ScanBizCards Enterprise
scanbizcards.SettingsUtils	ScanBizCards Enterprise

- d. Click "Save"
5. For System Permission:
  - a. Return to the Permission Set Overview
  - b. Under "System" click, System Permissions
  - c. Click "Edit"
  - d. Check the Enabled box for "API Enabled" Permission Name.
  - e. Click Save
6. Assigning Users:
  - a. At the Top of the screen click "Manage Assignments"
  - b. Click "Add Assignments"
  - c. Select ALL users that will be using SBCE that are NOT full System Administrators. i. Click Assign
  - d. Congratulations your users are now configured.

## User instructions:

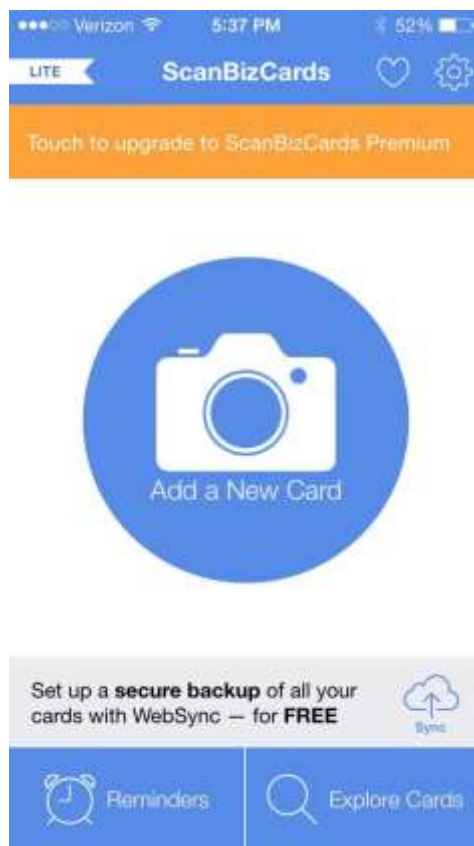
### iOS iPhone Instructions:

These instructions are for the end users of ScanBizCards Enterprise. They will need to install the actual mobile application AFTER they have been licensed. Unless you are using MDM software.

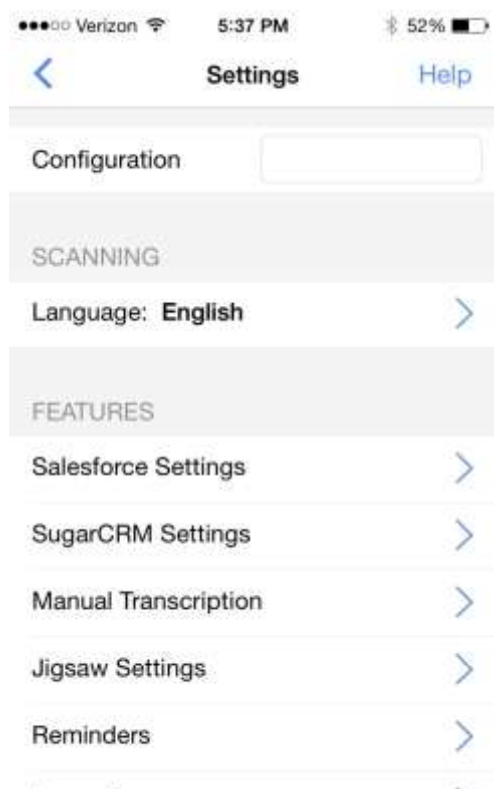
1. Navigate to the iOS app store.
2. Search for "ScanBizCards Lite" and install. This is the free version of our application.
  - a. NOTE: Upon finishing the integration the app will be upgraded to include all the paid app features in addition to our advanced Salesforce export options.



3. After installing ScanBizCards, open the application and you will see this home screen.



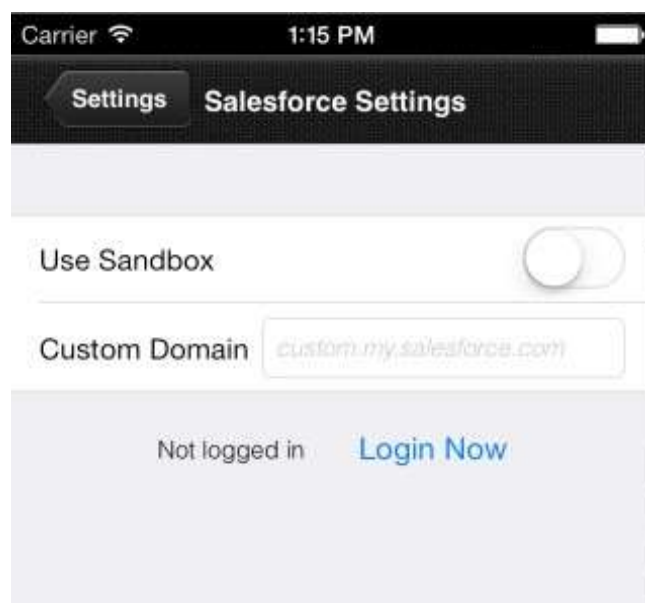
4. Go to settings, the gear icon in the top left in the previous image. Scroll down to “Features” and locate, Salesforce Settings.



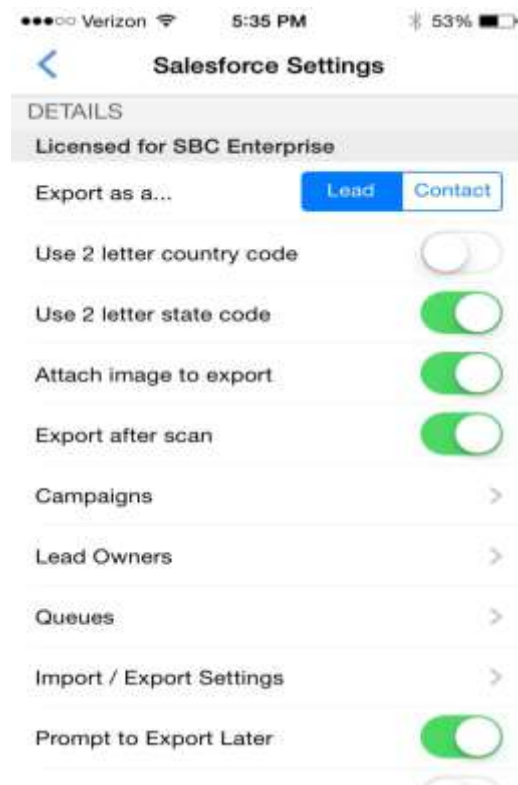
5. Once you click Salesforce Settings you will be prompted to log-in using your Salesforce username and password



- a. NOTE: If you use a single sign on OR Sandbox please follow step 6.
6. If you use Single Sign On, Hit the back to Salesforce Options in the top left when prompted to login on the last image. You will then see a box to enter your Single Sign on URL. Enter the URL and then click Login. Then enter your credentials per step 5. For Sandbox, Please toggle on the Sandbox switch and continue the login process.



- Once you have successfully logged in you should see the line, “Licensed for SBC Enterprise” at the top of the settings screen. You are now ready to start using ScanBizCards Enterprise.

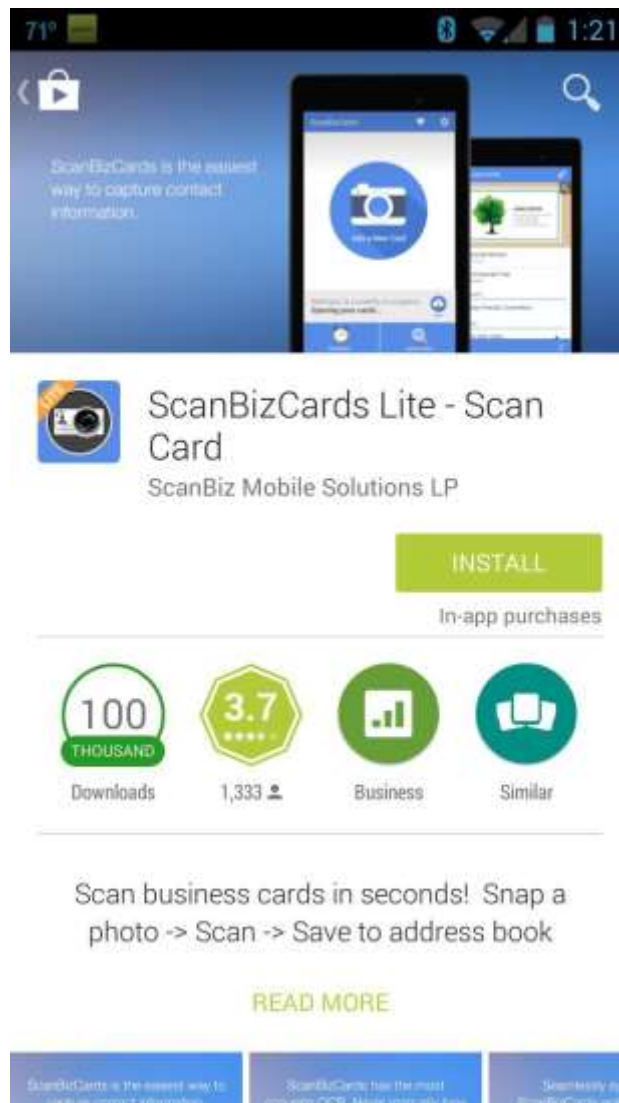


- If you have any questions please email [enterprise-support@scanbizcards.com](mailto:enterprise-support@scanbizcards.com) OR Call: 703-520-5555 X210

**Android Instructions on Next Page**

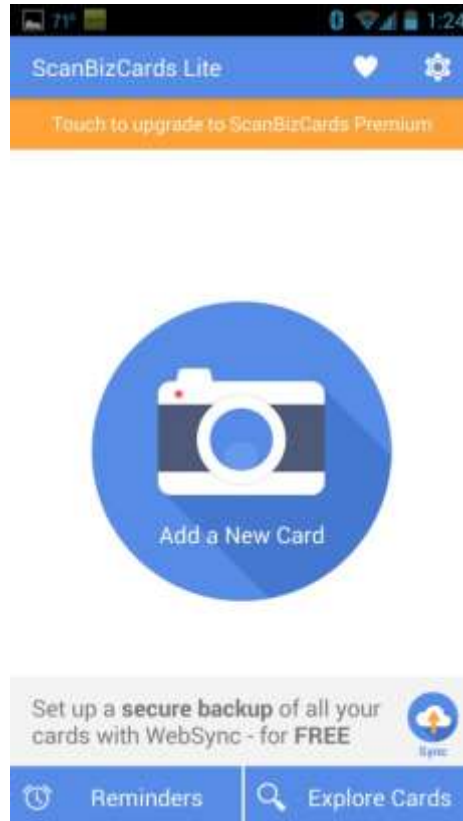
## Android Instructions:

1. Navigate to the Play store.
2. Search for “ScanBizCards Lite” and install. This is the free version of our application.
  - a. NOTE: Upon finishing the integration the app will be upgraded to include all the paid app features in addition to our advanced Salesforce export options.

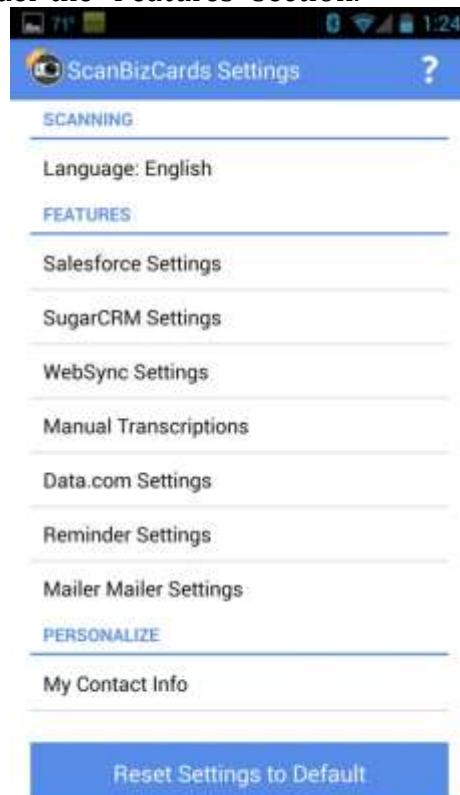




3. After installing ScanBizCards, open the application and click “Get Started”. You will then see this homescreen.



4. Go to settings, the Gear icon in the top right in the previous image. Locate “Salesforce Settings” at the top under the “Features” section.





5. Once you click Salesforce you will be prompted to log-in using your Salesforce username and password



6. Once you have successfully logged in you should see all the greyed out Salesforce options light up and become configurable.
  - a. Please refer to our advanced technical documentation for explanations on the various configuration options.
7. If you have any questions please email [enterprise-support@scanbizcards.com](mailto:enterprise-support@scanbizcards.com) OR Call: [703-520-5555](tel:703-520-5555) X210