



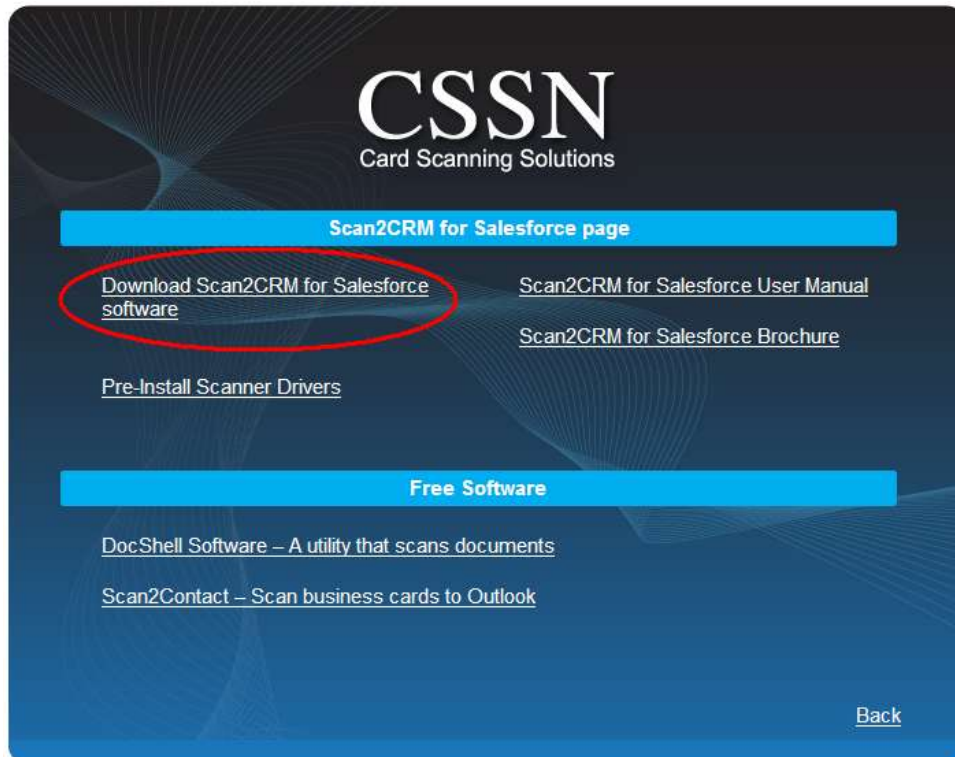
# **Scan2CRM for SalesForce**

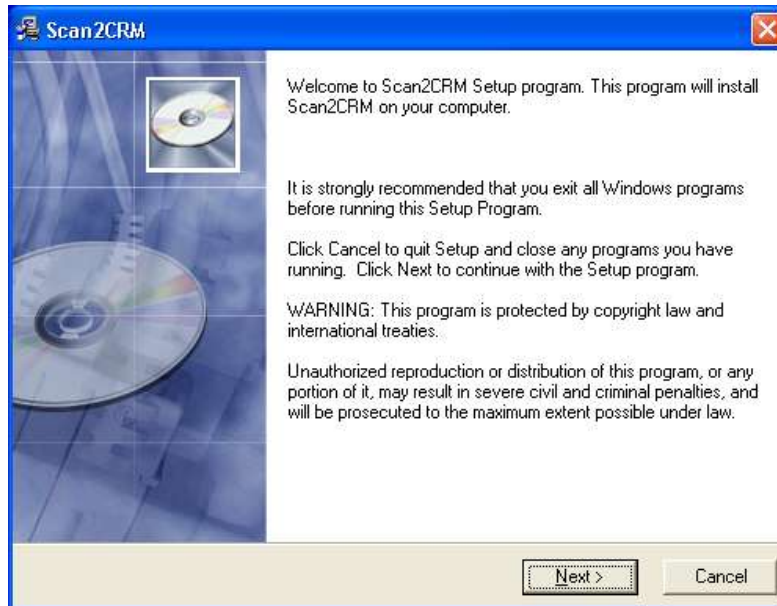
**Quick Installation Guide**

**DO NOT PLUG THE SCANNER INTO THE COMPUTER UNTIL THE SOFTWARE IS INSTALLED!**

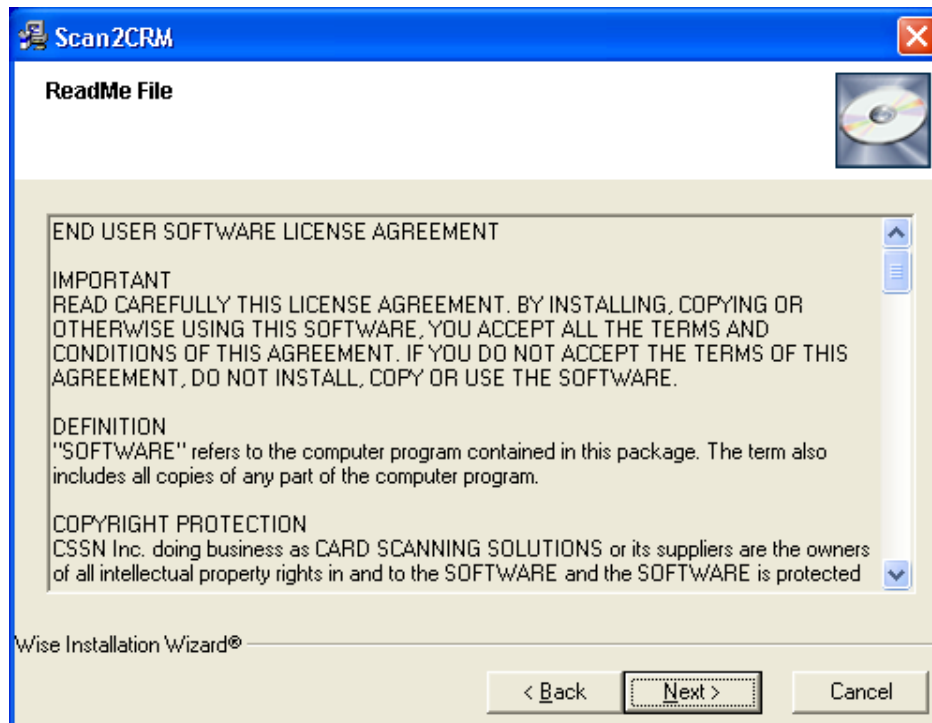
Download the setup file from the Scan2CRM for Salesforce page or from the following link:

<http://www.id-reader.com/ftp/applications/scan2crm/scan2crm.exe>

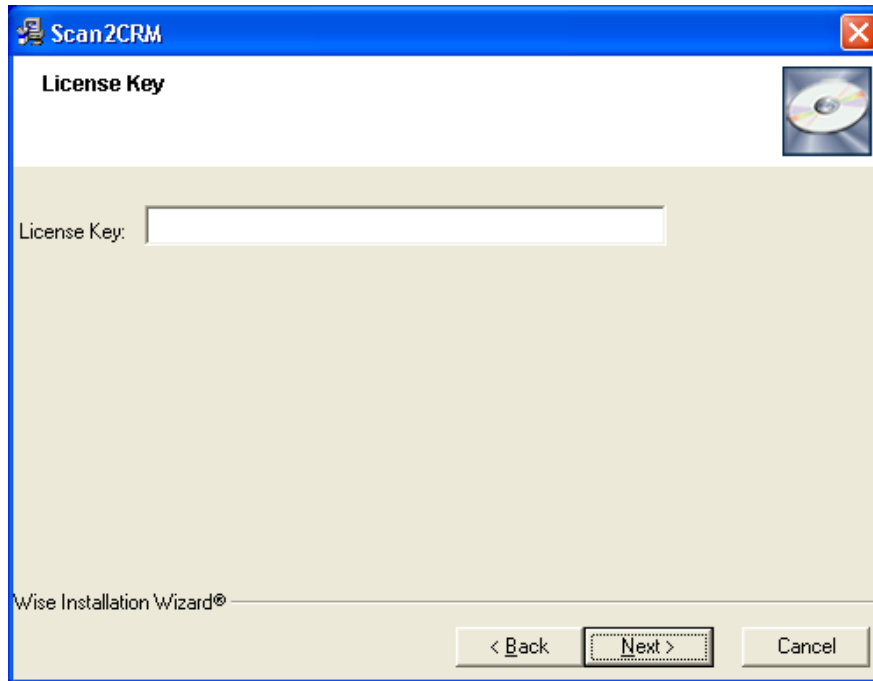




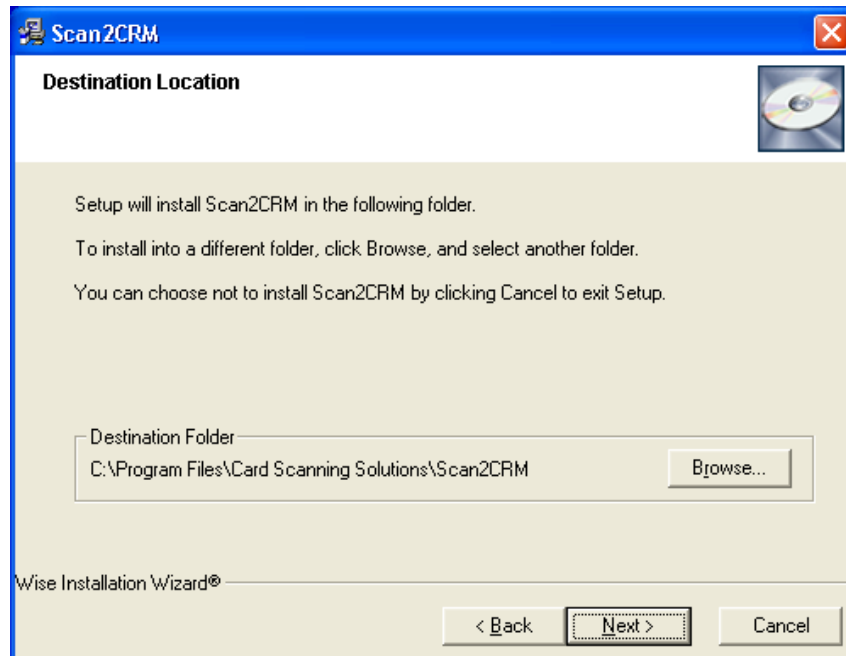
Once the download is complete run the setup file to begin.



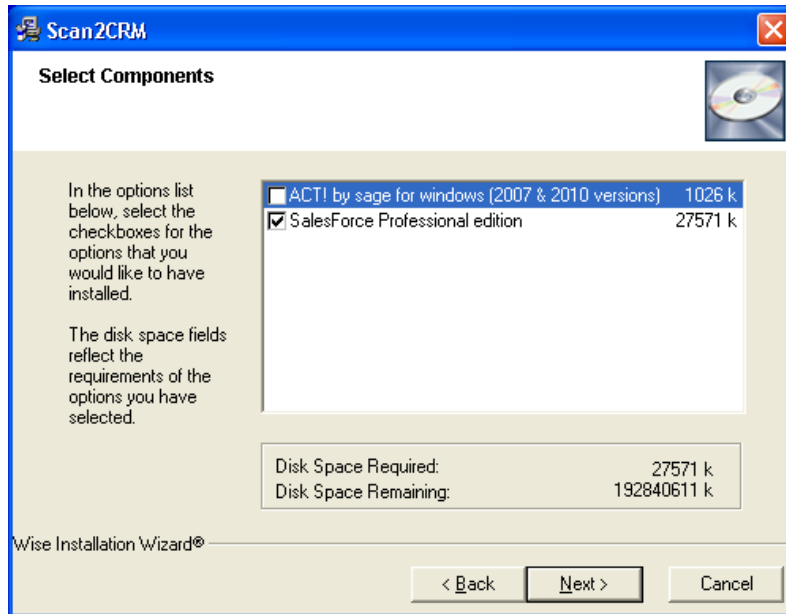
Read through the terms of the software license agreement and click "Next".



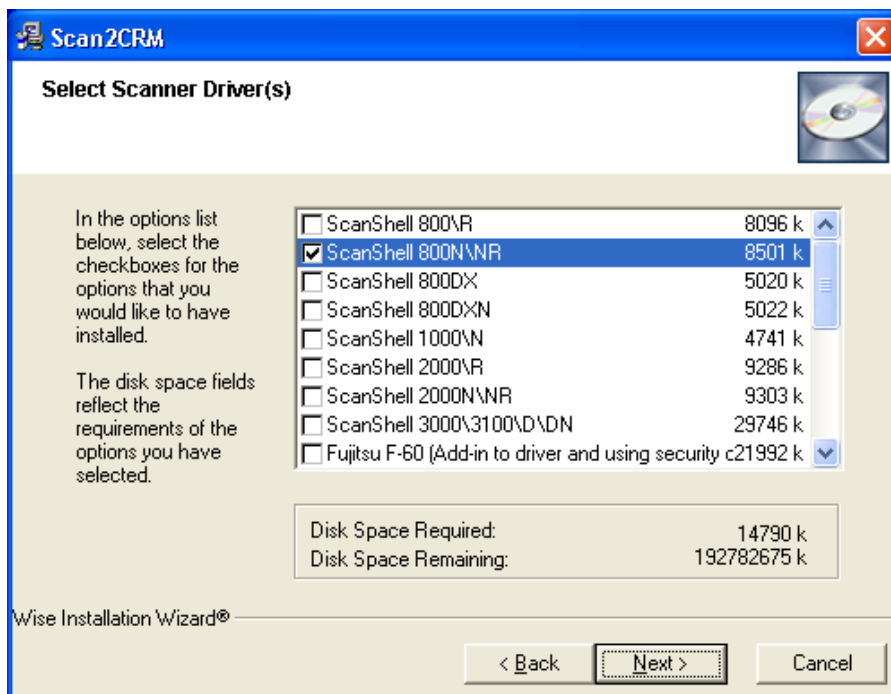
**Enter your 16 character license key found on the sleeve of the box. Make sure all the letters are entered as capital letters. (Same license key you entered at the [autorun.card-reader.com](http://autorun.card-reader.com) page.)**



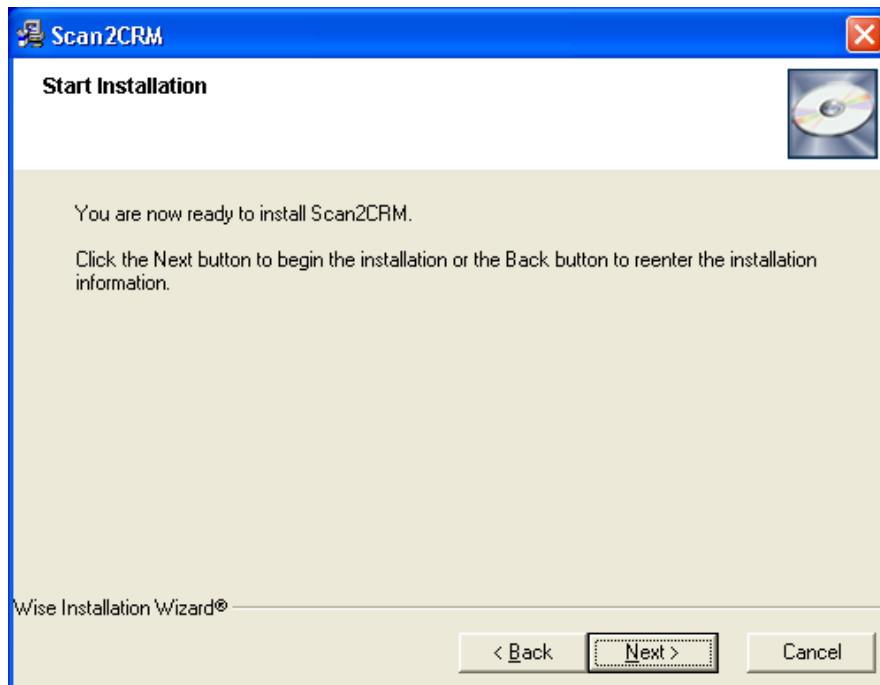
**You can use the default destination folder or browse to select another destination folder by clicking the “Browse...” button.**



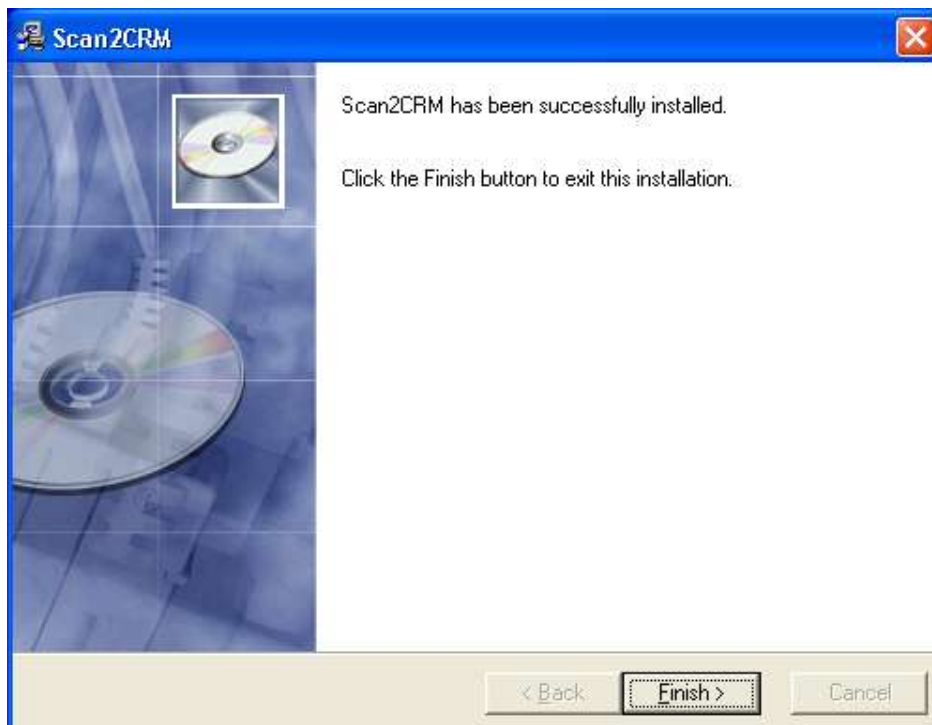
**Make sure the SalesForce Professional edition Check box is selected during the setup.**



**Select your scanner from the list of devices. (If you have a ScanShell 800N or ScanShell 800NR you will select the second scanner on the list)**



**Click "Next" to start the installation.**

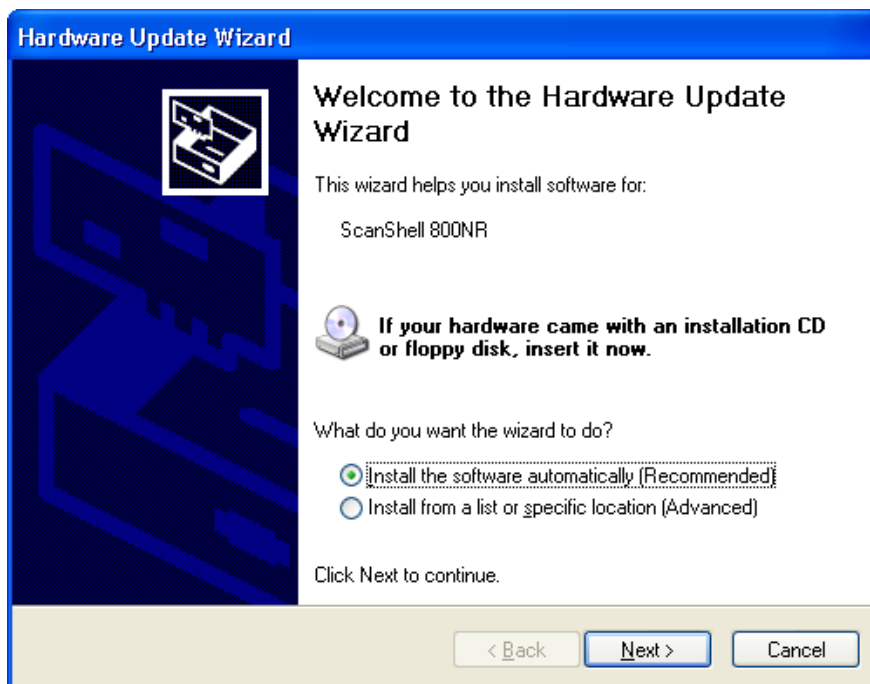


**Congratulations Scan2CRM is installed.**

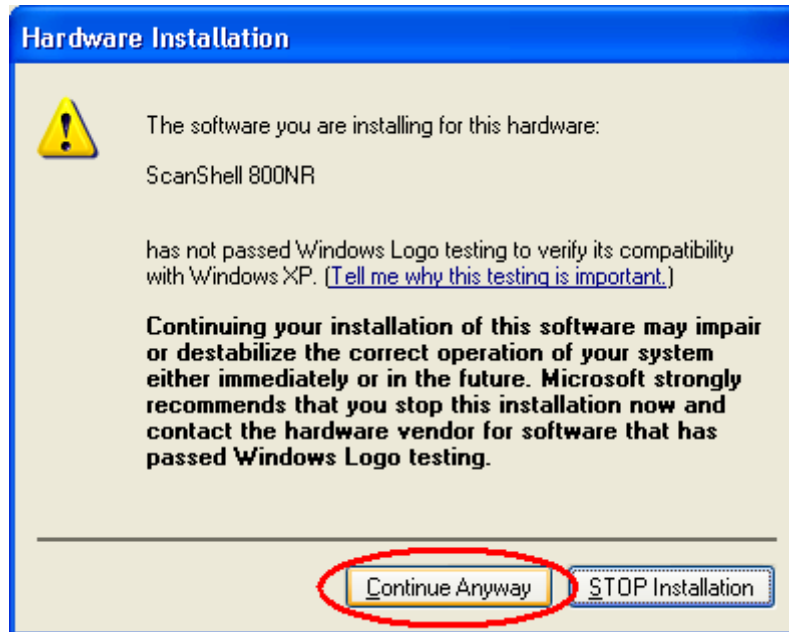
**PLUG THE SCANNER INTO THE REAR OF THE COMPUTER**



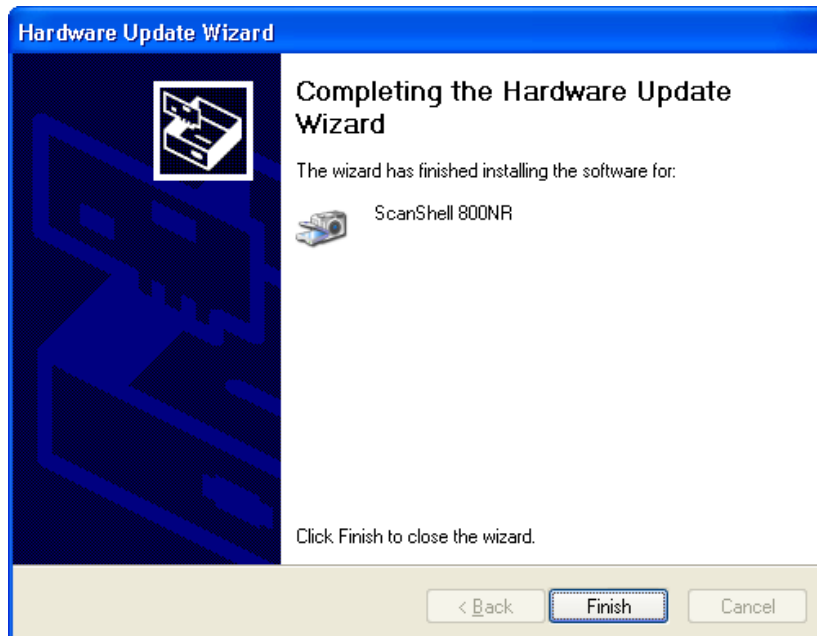
Select “No, not this time” and click “Next”.



Select “Install the software automatically [Recommended]” and click “Next”



If prompted select "Continue Anyway" to install.



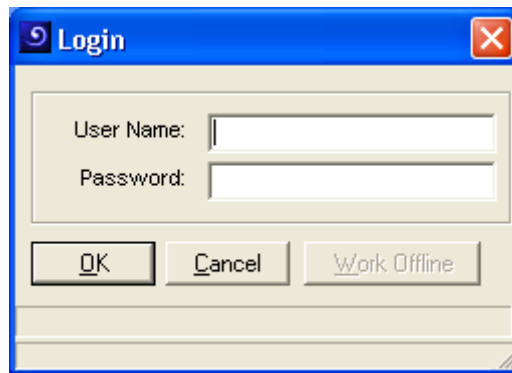
Click "Finish" to complete the installation.





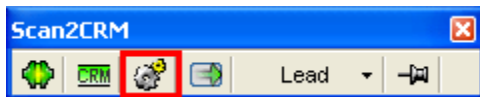
## Scan2CRM

Click the desktop icon for Scan2CRM to begin.

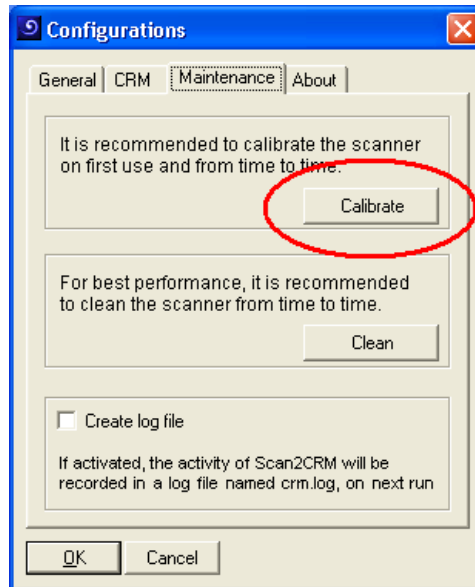


For your login you will use your Salesforce User Name and your Salesforce Password with your security token added to the end of your password.

\*You can retrieve your security token by logging into your Salesforce account and clicking "Reset security token" under "Setup". Your security token will be emailed to you.



Before you can start scanning you will need to calibrate the scanner. Click the gears on the Scan2CRM toolbar to bring up the "Configurations" box. You will find the "Calibration" button under the "Maintenance" tab.



**Insert the black and white calibration sheet that you received with your scanner. Make sure the black and white side is facing down. Once the calibration is complete close the configuration box and start scanning.**

**Insert a business card face down, to the right and landscape orientation.**

**If you need further assistance please submit a support ticket at**

**<http://www.card-reader.com/support.htm>.**