



Implementation Guide

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Introduction

The purpose of this guide is to offer direction on implementing the Vision-e Scan solution.

Vision-e Scan is a native Salesforce offering accessible via the Salesforce AppExchange. This solution has been engineered for seamless integration and immediate deployment.

After the AppExchange package has been installed in a Salesforce instance, administrators have the capability to allocate permission sets. This empowers users to install the mobile application, facilitating the transmission of business cards and badges to Salesforce.

The AppExchange and mobile app links can be accessed via www.Visione.com

Implementation

Step 1 - A representative with AppExchange installation permission installs the Salesforce package from the AppExchange.

The screenshot shows the Salesforce AppExchange interface. At the top, there is a search bar with the text "Search AppExchange". Below the search bar, the app listing for "Vision-e - Scan business cards, Event badges to Salesforce, Pardot" is displayed. The app is by Vision-e and is described as a "Business Card Scanner & Tradeshows. Scan NFC digital cards & QR Codes." It has a 4.41 average rating from 196 reviews. The app is available on the Salesforce App. Below the app listing, there are buttons for "Get It Now" and "More". There are also sections for "Business Need" (Productivity) and "Requires" (Sales Cloud). A "Freemium" section indicates that discounts are available for nonprofits, with a link to "Pricing Details". At the bottom, there is a banner that says "available on AppExchange" with the Salesforce logo.

AppExchange

Menu Sign Up Log In

Search AppExchange

scan **Vision-e - Scan business cards, Event badges to Salesforce, Pardot**

By Vision-e
Business Card Scanner & Tradeshows. Scan NFC digital cards & QR Codes.

Salesforce App 4.41 Average Rating (196 Reviews)

Business Need
Productivity

Requires
Sales Cloud

Get It Now **More**

Freemium
Discounts are available for nonprofits
[Pricing Details](#)

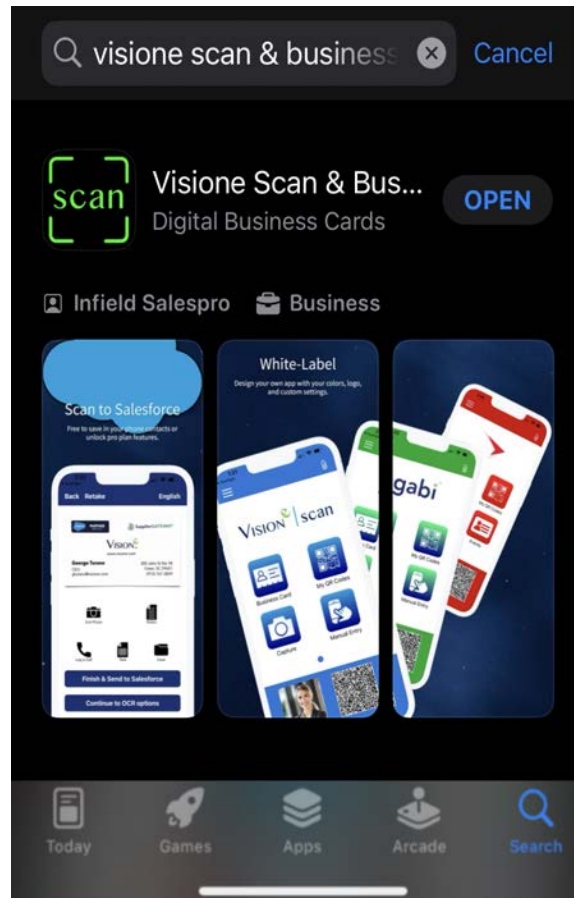
available on AppExchange

Step 2 - A Salesforce Administrator assigns permission sets to users.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left contains the text 'users'. The left sidebar menu is expanded to 'Users', with 'Permission Sets' highlighted. The main content area is titled 'SETUP Permission Sets' and includes a sub-header 'Permission Sets'. Below this, there is a description: 'On this page you can create, view, and manage permission sets.' A filter dropdown is set to 'All Permission Sets', with links for 'Edit', 'Delete', and 'Create New View'. A table lists existing permission sets with checkboxes for 'New' and 'Clone' actions.

<input type="checkbox"/>	Action	Permission Set Label ↑
<input type="checkbox"/>	Clone	Scan App Events
<input type="checkbox"/>	Clone	Scan App Events (Admin)
<input type="checkbox"/>	Clone	Scan App Permission Set
<input type="checkbox"/>	Clone	Scan App Permission Set (Admin)

Step 3 - Users install the mobile app available on the Apple App Store and the Google Play Store.



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- In-app subscription is self-service only at www.visione.com

Salesforce Administrators and end users will have access to on-boarding, training, and guides following the implementation.



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