

Psiog Business Card Scanner Documentation

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1. Document Info

Software Release:	V1.0
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2. Revision History

S No	Date of Modification	Change Made
1	05 Feb 2024	Document V1

3. Purpose

The document is intended to provide functional and technical information about the Business Card Scanner plug-in to help Users and Creatio Developers understand the functionalities and configure settings.

4. Plug-in Information

The Business Card Scanner plug-in is designed to facilitate the scanning of business cards and automatically generating the corresponding contact and account records from the Creatio mobile application. The plug-in can be used by organizations to leverage the Covve business card scanner API to scan business cards and generate contacts and accounts with Creatio.

5. Build Information

S No	Particular	Details
1	Version	1.0
2	Creatio Version Compatibility	8.0.6 +
3	Creatio Product	Across all products
4	Database	Postgres, MS SQL
5	Operating System	Windows 10
6	Platform	.NET Framework 4.7
7	Dependent Package	CrtMobile7x
8	Environments supported	Cloud, On site

6. Features

The Business Card Scanner will enable users to:

1. Scan business cards from the Creatio Mobile Application.
2. Generate the contact and account records based on the scanned business card.
3. View history of scanned records linked to the corresponding Contact and Account.

7. Control Points

1. The scanner supports capturing business card images from the camera on iOS devices only. For Android devices, it only supports the upload of images from the gallery.
2. The scanned business card must contain the following details: Name, E-mail ID, Company Name.
3. Currently, the scanner supports recognizing business card details using the Covve Business Card Scanner API only.
4. The correctness of the contact and account details depends on the accuracy of the Covve Business Card Scanner API.

8. Configuration

8.1 Covve Business Card Scanner API Key

The Covve Business Card Scanner API Key is required to obtain the contact's details from the scanned business card. Please refer [Covve's website](#) for more details.

8.2 Lookups

The following lookup needs to be configured with the Card Scanner API credentials.

Name of lookup: Scanner API

Code: PsgScannerAPIs

Structure:

S No	Column Title	Column Code	Type	Description
1	Name	Name	String	Name
2	Url	PsgUrl	String	Url of the business card scanner API (ex: https://app.covve.com/)
3	Key	PsgKey	String	Scanner API Key
4	Fix name capitalization	PsgFixNameCapitalization	Boolean	If true, fixes name capitalization of scanned cards
5	Parse address	PsgParseAddress	Boolean	If true, enables parsing of address fields in the API response

Lookups

NEW CLOSE ACTIONS ▾

Scanner API

Filters/folders ▾

Name	Url	Key	Fix name capitalization	Parse address
Covve	https://app.covve.com/	1-169-14-1-12-4b22...	Yes	Yes

8.3 System Settings

In the System settings section, configure the default scanner API:

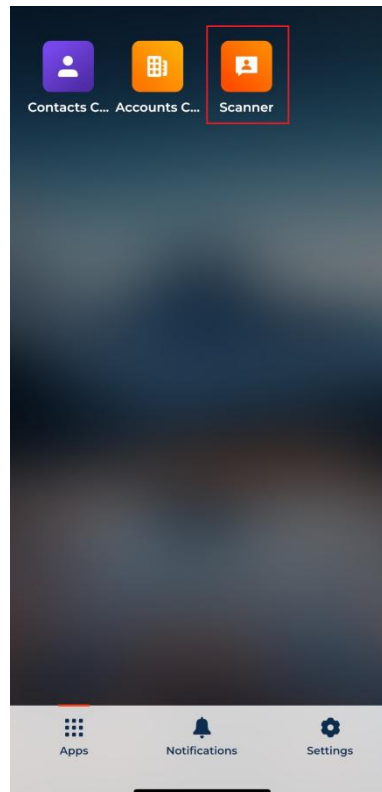
S No	Name	Code	Description
1	Scanner api	PsgScannerApi	Select the default API (from the lookup configured in 8.2)


8.4 License Allocation

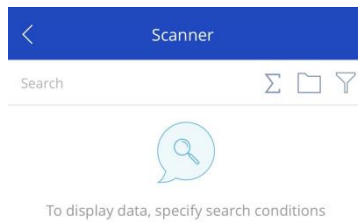
The user should check that licenses are added and available in the 'All licenses' block in the License manager.

9. Walk-through

1. Navigate to the 'Scanner' section in the Creatio Mobile application.

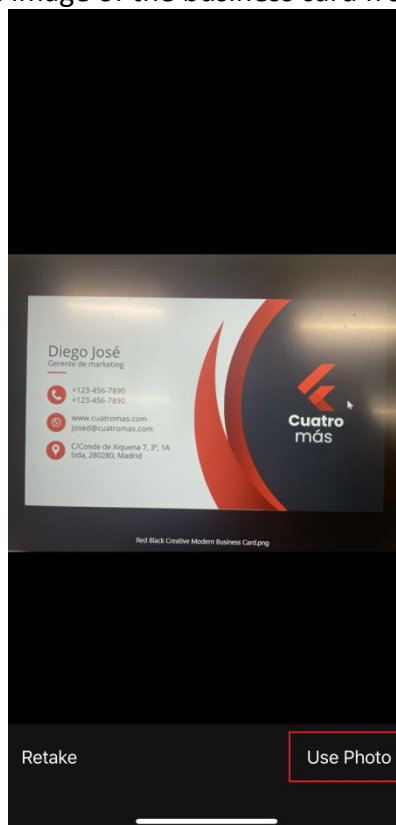


2. Click on the 'Add Record'  button

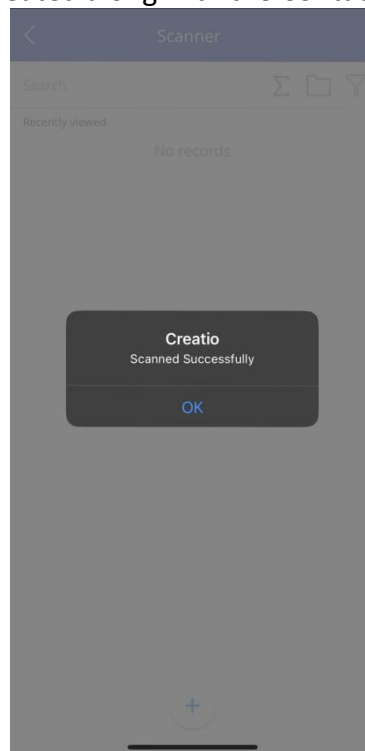


3. This opens up the camera on iOS devices and the gallery on Android devices.

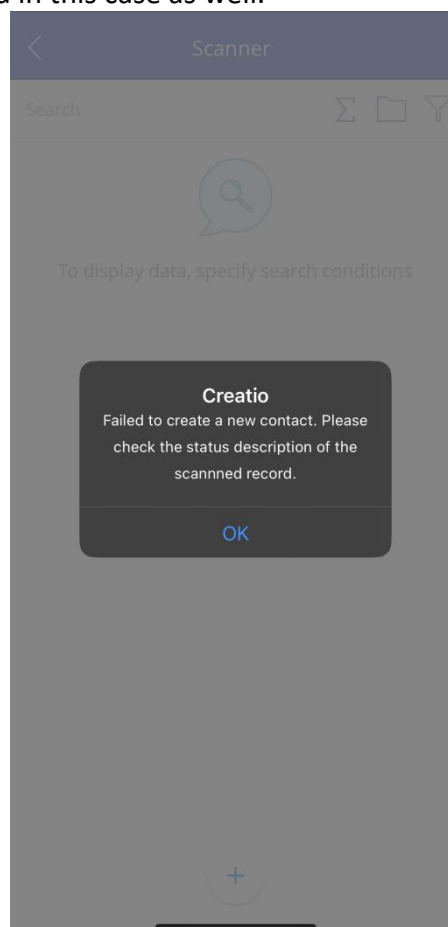
- a. On iOS devices:
 - i. Capture the image of the business card
 - ii. Tap on 'Use Photo'
- b. On Android devices:
 - i. Select the image of the business card from the gallery



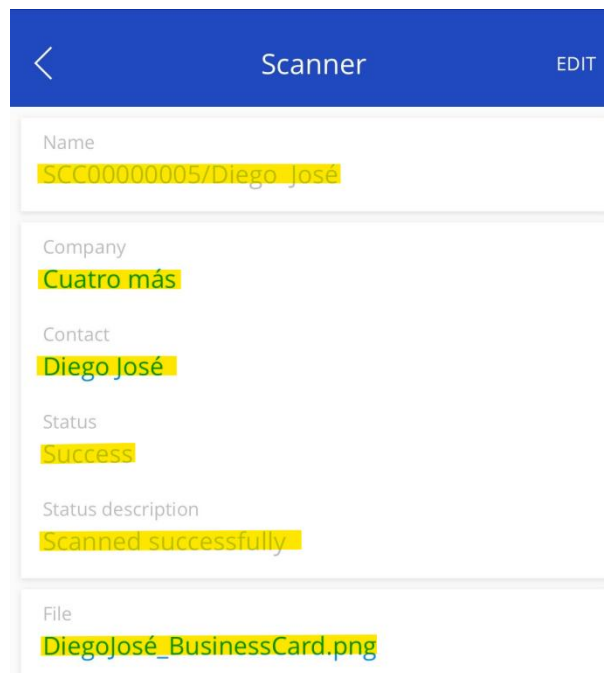
4. If the scanning is successful, you will get an alert saying 'Scanned Successfully' and a new 'Scanner' record is created along with the Contact and Account records.



In case of failure in scanning (due to the contact already being present / the API not being available at the moment), you will see an alert box with the error message. The 'Scanner' record is created in this case as well.



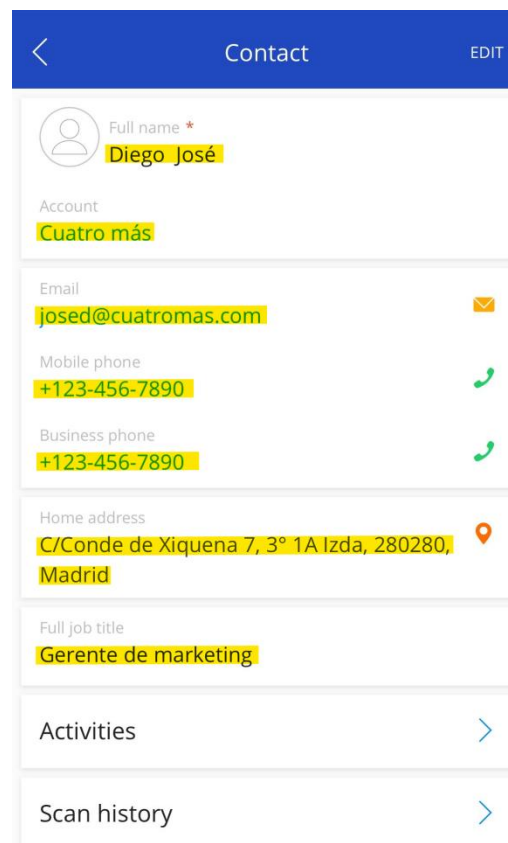
- In the newly created Scanner record (titled SCC<8-digit unique auto-number> /<Contact Name>), you can find the status of the scan and the links to the corresponding contact and account records which were created. The scanned image is also present as an attachment with the name <ContactName>_BusinessCard.png



The screenshot shows a mobile application interface for a 'Scanner' record. The header is blue with a back arrow, the title 'Scanner', and an 'EDIT' button. The record details are as follows:

- Name:** SCC00000005/Diego José
- Company:** Cuatro más
- Contact:** Diego José
- Status:** Success
- Status description:** Scanned successfully
- File:** DiegoJosé_BusinessCard.png

- The contact and account records will be populated with the details from the business card



The screenshot shows a mobile application interface for a 'Contact' record. The header is blue with a back arrow, the title 'Contact', and an 'EDIT' button. The contact details are as follows:

- Full name *:** Diego José
- Account:** Cuatro más
- Email:** josed@cuatromas.com (with an envelope icon)
- Mobile phone:** +123-456-7890 (with a phone icon)
- Business phone:** +123-456-7890 (with a phone icon)
- Home address:** C/Conde de Xiquena 7, 3º 1A Izda, 280280, Madrid (with a location pin icon)
- Full job title:** Gerente de marketing
- Activities:** (with a right-pointing arrow)
- Scan history:** (with a right-pointing arrow)

< Account EDIT

Name *
Cuatro más

Web
www.cuatromas.com

Contacts >

Activities >