

32158 Camino Capistrano Suite A PMB 373 San Juan Capistrano, CA 92675 Sales@CaptureComponents.com www.CaptureComponents.com

# Scanning to Salesforce<sup>®</sup> Documents with ccScan<sup>®</sup>

Document Capture to the Cloud

## **Overview**

This white paper shows how ccScan<sup>®</sup>, a production-quality document capture application, can be used to capture documents to Salesforce<sup>®</sup> Documents in an automated, time-saving manner.

Salesforce.com is the enterprise cloud computing company which is known primarily for three things: the Sales Cloud and the Service Cloud, their applications for sales and customer service (also known as customer relationship management or CRM); Force.com, their cloud platform for building and running business applications; and Chatter, their enterprise collaboration application. These and other Salesforce applications all run in the cloud and are sold in a subscription basis. Since there is more to Salesforce than this short introduction can cover please visit the Salesforce website at <a href="http://www.salesforce.com">http://www.salesforce.com</a> for in-depth information.

Although Salesforce customers can easily upload their documents if they are already in digital format, paper documents must be scanned first and then manually uploaded. ccScan eliminates the time typically wasted with such a multi-step, manual operation that consists of scanning a document locally to the PC, naming this document, creating a folder in Salesforce Documents, and finally uploading the document to Salesforce Documents. Instead ccScan does all of the above in a single-step operation that is fully automated. Naming of documents and folders can be manual or automated by using barcodes, OCR with Text Pattern Search, and running counters. In addition to scanning paper documents, ccScan has bulk import capabilities for already digitized documents that allow entire folders to be uploaded to Salesforce Documents in a single step using wild card file specifications and recursion.

This white paper describes ccScan for Salesforce Documents. Capture Components also offers ccScan for Salesforce Content (which scans and imports documents into Salesforce Content) and ccScan for Salesforce Attachments (which scans and imports documents as Salesforce Attachments). To learn more about ccScan for Salesforce Content please visit the Capture Components website at <a href="http://www.capturecomponents.com">http://www.capturecomponents.com</a>.

## ccScan for Salesforce<sup>®</sup> Documents

Capture Components, LLC markets different versions of ccScan targeted for different document repositories. The ccScan versions for "Internet Cloud" based storage support Google Drive and Docs, Box, Salesforce, Dropbox, Microsoft SkyDrive, Amazon S3, Windows Azure, etc, but other types of document repositories are supported as well. For example, documents can be captured remotely and stored in Microsoft SharePoint and SharePoint Online using SharePoint's Internet-based web services interface. Additionally ccScan works with the Microsoft Windows file system utilizing its local hard drive or networked folders for storage.

## Two Editions: ccScan Advanced and ccScan Standard

**ccScan Advanced for Salesforce** is best explained with some examples: create Attachments from scanned paper documents or imported PDF documents and update fields in the parent record with information extracted from the attached document in a single, fully automated step. Run unattended jobs to import electronic faxes and attach them automatically to existing or newly created Salesforce records. Scan invoices and automatically attach them to custom Purchase Order records using the extracted PO number for lookup. Scan paper documents and automatically populate custom fields in Content Libraries.

ccScan Advanced features are based upon sophisticated technologies such as barcode detection, OCR, and Text Pattern search with Regular Expressions. These capabilities are applied to both the scanning of paper documents in the paper-based office and the processing of electronic documents in the paperless office.

**ccScan Standard for Salesforce** is similar to ccScan Advanced without the automation capabilities. ccScan Standard is typically used in a paper-based office to efficiently scan paper documents to Salesforce. Eliminate manual steps like scanning locally, naming the document, creating a folder (in Salesforce Documents), uploading the document to Salesforce, and finally editing the Salesforce properties of the document such as description and keywords, or entering values in the custom fields defined for a Salesforce Content library. Instead, ccScan Standard does all of this in an efficient, single-step operation.

## ccScan Overview

Although ccScan costs significantly less than competing products, it is a full-featured, production-level, document capture system. The software takes full advantage of today's multi-core processors. On a quad-core computer the scanning, barcode detection, text recognition, and export to Salesforce each run on a separate core to maximize throughput. Consequently most TWAIN-compatible production scanners are operated at rated speed. Since ccScan has been designed to be enterprise-friendly, it contains a Setup mode and a User mode. The Setup mode is password protected. Jobs are created in Setup mode and can be used over and over again in User mode. To make sure ccScan can be used immediately after installation, without having to create a job first, a set of default jobs is provided to cover common document capture scenarios.

Jobs can be associated with a scanner button, which can make running a job in User mode as simple as pressing a button on the scanner. ccScan also contains an Index/QA mode that allows the operator to check the document or enter indexing data before the document is sent to Salesforce. Documents are automatically separated if barcode sheets are used.

On platforms that contain no native document viewing options such as Amazon S3 and Windows Azure, ccScan provides the capability to create View jobs that will list all documents entries or a subset in either a sequential list or hierarchical format. View jobs, however, are not enabled for Salesforce since Salesforce natively provides document viewing capabilities.

ccScan uses the Salesforce REST API to upload documents to Salesforce. The Salesforce REST API is also used to create, rename, and delete folders. Although there is no need to know anything about the Salesforce REST API to use ccScan, Salesforce users interested in learning more about this API can go to <u>http://developer.force.com/REST</u>.

Despite its low price, ccScan has all the high-end features and no restrictions such as page click charges. For detailed information about ccScan or to download a free trial version, please visit Capture Component's website at <u>www.capturecomponents.com</u>.

## **Typical Scenario**

To give the reader a flavor of capturing and storing documents in Salesforce with ccScan the following sections contain walkthroughs annotated with screenshots of a typical scanning and bulk import scenario. Although the default set of jobs installed with ccScan cover capturing and storing documents in Salesforce, the example scenarios assume that no ccScan Jobs have been created previously so both Setup and User modes can be shown. For ease of illustration certain details such as the creation of an account with Salesforce or how to enter Setup mode have been left out of these descriptive scenarios.

#### **Create Scanning Job**

To start a new scanning job must be created. In ccScan jobs are created in Setup mode. Once a job has been created, it can be used over and over again in regular User mode. The Administrator selects default values for the various job settings and decides which job settings can be entered or modified by the operator. The job settings are organized by category such as Scanner settings or Export settings.

Description:	Scan to Salesforce Documents				
Job Type:	Scan, Export 👻				
Repository:	Salesforce® Documents				
File Name:	Scan_to_Salesforce_Documents.ccJc				
To create a job, enter a description, select the type of job, and select the repository. Note that View type jobs which support document retrieval are not supported by all repositories. Once a job has been created you can configure it and select the index fields that the user should enter.					
	OK Cancel				

Figure 1 - Create New Scanning Job

In the dialog box above Salesforce Documents has been selected as the repository for export of the captured documents. If ccScan were licensed for multiple repositories, the target repository for the job would be selected here from the list of available repositories. Note that the Job Type is Scan, Export.

#### **Enter Salesforce Credentials**

Immediately after the new job has been created, the dialog below comes up to enter the user name and password for a Salesforce account.

Both in User mode and Setup mode the operator must enter an email/username and password of an active Salesforce account. When the Login button is pressed ccScan obtains an authorization token from Salesforce that is subsequently used to request information from Salesforce such as a list of existing folders on Salesforce.

ccScan Login to Salesforce	Bookmark this page
salesforce	
User Name	
Password	salesforce site.com
Remember User Name Login Forgot your password?	Market at the speed of social
	Try it now
Don't have an account? Sign up for free.	
	IT help desk for the Social Enterprise     What's next for customer service?     Connect to more sales and growth       Remedyforce demo     Show me     Data.com video
Please login to Salesforce. ccScan will use the resulting Authoriz	zation Token to capture directly into your Salesforce
account.	<u>Q</u> K <u>C</u> ancel



To prevent users from having to login each time ccScan is started, the obtained authorization token is stored in between ccScan sessions in an encrypted file that can only be read by ccScan and only on the PC where it was created. At any time the user has the option to revoke the authorization token on the Salesforce website. Note that ccScan can be configured to disable the default auto-logon which requires that users re-enter their Salesforce credentials each time they use ccScan.

To give the administrator some flexibility, ccScan allows the administrator to set a timeout for a particular job; if the job has not been run for e.g. 60 seconds, the currently loggedin user is automatically logged out (and the dialog above will come up when the job is started again).

Copyright © 2011-2013 by Capture Components, LLC. All rights reserved. Capture Components, LLC encourages the reader to freely share and distribute this White Paper.

#### **Configure New Scanning Job**

In the form below the Administrator can configure the new Scanning job. The same form is used to make modifications to the job later.

💐 ccScan							X
<u>F</u> ile <u>V</u> iew <u>S</u> canner	<u>J</u> obs <u>P</u> age <u>A</u> dmin	<u>H</u> elp					
Ӹ 🛃 💥 🎆 🛛 Fit Ima	age - 🚰 🔍 🔍 100%	$\gg \ll$	Page: 1 -	1			
Available Jobs							<b>▼</b> ₽
Description				Action Rep		Гуре	
Scan Kiosk to Salesforce Do Scan to Salesforce Docume						n, Export n, Export	THE P
🛃 Available Jobs 📑 Index				ocan oak	Salorce Do Ocal		
	Salesforce Documents						4 Þ
Field Name	Default Value	Show	Order	Input Control	Edit Field Nam	ie	
Job							
Description:	Salesforce Documents		0 🄶	TextBox 🔻	Description		
Export							Ξ
Salesforce Folder:	Property	1		FolderBox •	Salesforce Folder		
Document Name:	Deed%c4:00%	<b>√</b>	2 🊔 🤅	TextBox ▼	Document Name		
Description:	*	<b>√</b>	3 🌲	TextBox 🔹	Description		
	-						
Keywords:		1	4 🌻	TextBox 🔻	Keywords		
	-						
Internal Use Only:	Enabled	<b>√</b>	5 🌲	CheckBox 🔻	Internal Use Only		
Externally Available:	Enabled	1	6 🍦	CheckBox 🔻	Externally Availab	le	
Upload Documents:	Always Create Ne 🔻	<b>√</b>	7	ComboList 🔻	Upload Documen	ts	
Job Expiration:	0		0	TextBox 🔻	Job Expiration		
Document ID:		<b>v</b>		TextBox •	]		
Index/QA Later:	Enabled	<b>v</b>		CheckBox •			
			- <u> </u>				-
				Validat <u>e</u>	Save Jo <u>b</u>	Close	
ОК					5	Scn   Imp   Ocr   E	Exp .:

#### Figure 3 - Configure New Scanning Job

The name and description of the newly scanned document are entered in Document Name and Description. Optionally, the name of a folder located on Salesforce Documents can be entered or selected in Salesforce Folder (or selected from the list of existing folders). To allow for automated naming, ccScan supports the use of "macros" in document and folder names that automatically insert counter and barcode values. Automated naming is used with high-capacity scanners whose hoppers can hold large stacks of documents separated by barcode sheets.

The Upload Document settings determine what happens if a document already exists on Salesforce: Always Create New, Update Existing, or Conflict on Error (which means stop the job in progress and report an error). Job Expiration can be set to the number of seconds of idle time after which the logged-in Salesforce user is automatically logged out. The default setting of zero disables this automatic logout. Typically this feature is used in a scanning "kiosk" environment.

In Keywords optionally one or more keywords are entered that characterize the document and which can be used in Salesforce Documents to search for the document. Check the Internal Use Only setting to mark a document as confidential. Check the Externally Available setting to make the document available in e.g. HTML email templates without requiring a username and password. Document ID will contain the unique ID that Salesforce assigned to the newly uploaded document. Also provided are a series of standard PDF settings, such as user and owner password, which will be applied to the captured documents before they are exported to Salesforce.

For each setting, the Administrator selects or enters a value. Default values are provided where possible. The Administrator can also make settings available for the operator to enter, except for the Administrator-only settings. For the settings to be entered by the operator, the Administrator determines the order in which these settings are shown, optionally modifies the default description of each setting, and selects which type of input control should be presented to the operator.

After the Export Settings, the Scanner Settings are entered. The scanning of documents in ccScan is based on the TWAIN standard. The scanner manufacturer provides TWAIN drivers. All the scanner settings you would expect in a production-level document capture system are provided: basic settings such as export format, resolution, paper size, and advanced settings such as barcode detection, which for example, can be used to automatically separate documents or automatically specify folder names. Jobs can also be associated with a button at the scanner front panel so that the job is started automatically with a press of the button.

TWAIN settings highly specific to the type of scanner can optionally be set with the TWAIN dialog box. These settings are saved locally on the computer and associated with the job. For those settings common between ccScan and the TWAIN dialog box, the ccScan settings can be given priority over the TWAIN settings. With this capability the administrator can give the operator access to the TWAIN dialog box and still, for example, enforce company standards such as 200 DPI resolution.

#### **Run this Scanning Job**

Once the job has been created it can be run over and over again in User mode. The job is started either from the scanner front panel or with the Start Job button in ccScan.

🥙 ccScan						- 🗆 🗙	
<u>File View S</u> canner Jobs <u>P</u> age <u>A</u> dmin <u>H</u> elp							
두 崣 🛃 💥 🌆 🛛 Fit Imag	🧼 🅁 🌠 🎆 🛛 Fit Image 🛛 🙀 🔍 🔍 13% 🛛 🚿 🤾 Page: 1 - 1 🛛 🔍 🖌 🕨 🕨 🕼						
Available Jobs		-		Deed03.pdf		4 Þ	
Description Scan Kiosk to Salesforce Docume Scan to Salesforce Documents	Action nts Scan Scan	Repository Salesforce® Do Salesforce® Do	4 111 +	÷		· · · · · · · · · · · · · · · · · · ·	
🛃 Available Jobs 🚦 Index/QA Jo	obs 🚦 Views			D192132245 NATIONSBANC MTG CORP P 0 BOX 630005			
Scan to Salesforce Documents		•	ą	P C BOK 630005 DALLAS, TX	75263 0005		
Field Name	Value			-W A R N I N G-THIS IS PART OF THE	OFFICIAL RECORDD O	NOT DESTROY	
Export Salesforce Folder:	Property	•••		T OI TRINIT	ANT COUNTY T NDERSON COUNT IAL RECEIPT Y-WESTERN TITLE CO		
Document Name:	Deed%c4:00%			RECEIPT NO REGI 192242471 DR		ED DATE TIME 9/92 14:31	
Description:	Sample job	•		INSTRUMENT FEE 1 D192132265 D T O T A L : DOCUME		TIME 14:31 CK 16942 14.00	
Keywords:	ccScan, scan to the o	cloud	Ш	B Y:	STRICTS THE SALE RENTA	L OR USE LOR OR RACE	
Internal Use Only:	Enabled			IS INVALID AND UNEXPORT	CEABLE UNDER FEDERAL L	A#.	
Externally Available:	Enabled					-	
Upload Documents:	Always Create New	-		Log		<b>→</b> ₽ <b>×</b>	
Index/QA Later:	Enabled			Date/Time	Action	Job Description	
Document ID:	015E000000tdULIA	Y		3/21/2012 8:59:43 PM	ExportDoc	File Import to S	
Scanning				3/21/2012 8:59:44 PM	ExportJob	File Import to S	
Document Format:	PDF	-		3/21/2012 9:27:14 PM 3/21/2012 9:27:14 PM	ExportDoc ExportJob	Scan to Salesfor	
JPEG Quality:	Good	•			,		
Pixel Color:	Seannar Sotting		Ψ.				
Valida	ate Start Scan	<u>Cancel</u>			-1- <b>- - - -</b>	•	
Validate       Stary Scan       Cancer       E Log       Mini-Tutorials       Preferences       Config         Document Count:       1 Pages Current Document:       1 Total Pages Processed:       1       Scn       Imp       Ocr       Exp       ,;							
Document Count: 1 Pages Cur	Tent Document: 1 10	otal Pages Proces	sea:	1	SCh	Imp   Ocr   Exp   .:	

#### Figure 4 - Run this Scanning Job

Typically jobs are configured so that the operator must enter at least a destination folder and a document name, unless ccScan's automated naming capabilities are used. Optionally the operator can change default scanner settings or enter or select additional Salesforce fields.

Copyright © 2011-2013 by Capture Components, LLC. All rights reserved. Capture Components, LLC encourages the reader to freely share and distribute this White Paper.

Once the job is started, ccScan disables the Start Scan button and does not allow any changes to the form. However, the operator is allowed to press the Cancel button. To provide visual feedback the scanned pages are displayed while the job is running.

#### **Create Import Job**

To start a new Import job it must be created. In ccScan jobs are created in Setup mode. Once a job has been created, it can be used over and over again in regular User mode. The Administrator selects default values for the various job settings and decides which job settings can be entered or modified by the operator. The job settings are organized by category such as Import settings or Export settings.

Description:	Import Bulk to Salesforce Documents
Job Type:	Import, Export
Repository:	Salesforce <sup>®</sup> Documents
File Name:	Import_Bulk_to_Salesforce_Documen
job, and select which support of all repositories	b, enter a description, select the type of the repository. Note that View type jobs document retrieval are not supported by . Once a job has been created you can d select the index fields that the user
	<u>O</u> K <u>C</u> ancel

Figure 5 - Create New Import Job

In the dialog box above Salesforce Documents has been selected as the repository for export of the imported documents. If ccScan was licensed for multiple repositories the target repository for the job would be selected here from the list of available repositories. Note that the Job Type is Import, Export.

#### **Enter Salesforce Credentials**

Immediately after the new job has been created and the Salesforce credentials have not been entered yet, the user name and password for a Salesforce account must be entered with the dialog described earlier in this document.

#### **Configure New Import Job**

In the form below the Administrator can configure the new Import job. The same form is used to make modifications to the job later.

🥙 ccScan				3
<u>F</u> ile <u>V</u> iew <u>S</u> canner	<u>J</u> obs <u>P</u> age <u>A</u> dmin	<u>H</u> elp		
🍓 🗲 💥 🍇 🛛 Fit Im	age - 🚰 🔍 🔍 13%	$\gg \ll$	Page: 1 - 1	
Available Jobs			•	д
Description			Action Repository JobType	-
File Import to Salesforce Do Import Bulk to Salesforce D			Import Salesforce®Do Import, Export Import Salesforce®Do Import, Export	
🖶 Available Jobs 📴 Index				
Setup Job: Import B	ulk to Salesforce Docum	nents		4 0
Field Name	Default Value	Show	Order Input Control Edit Field Name	
Job				•
Description:	Salesforce Document		0 🚽 TextBox 💌 Description	
Export Salesforce Folder:			1 EnderBox Salesforce Folder	
	Property	✓		=
Document Name:	Deed%c4:00%	$\checkmark$	2 🕞 TextBox 🗸 Document Name	-
Description:	*	1	3 テ TextBox 🔹 Description	
	-			
Keywords:		$\checkmark$	4	
	-			
Internal Use Only:	Enabled	1	5 🚔 CheckBox 👻 Internal Use Only	
Externally Available:	Enabled	$\checkmark$	6	
Upload Documents:	Always Create Ne 🔻	<b>√</b>	7	
Job Expiration:	0		0 🕞 TextBox 🔻 Job Expiration	
Document ID:		1	8	
Index/QA Later:	Enabled		0 💭 CheckBox 🗸 Index/QA Later	-
			Validate Save Job Close	
OK			Scn   Imp   Ocr   Exp	
				1.:

#### Figure 6 - Configure New Import Job

The name of the newly imported document is entered in Document Name. If Document Name is left blank, the new document will get the same name as the imported file (or the name of the first file if multiple files are imported). All the Salesforce fields mentioned earlier for scanning are available for import as well.

Copyright © 2011-2013 by Capture Components, LLC. All rights reserved. Capture Components, LLC encourages the reader to freely share and distribute this White Paper.

For each setting, the Administrator selects or enters a value. Default values are provided where possible. The Administrator can also make settings available for the operator to enter, except for the Administrator-only settings. For the settings to be entered by the operator, the Administrator determines the order in which these settings are shown, optionally modifies the default description of each setting, and selects what type of input control should be presented to the operator.

After the Export Settings, the Import Settings are entered. First the type of import must be selected, either File Import or Bulk Import. File Import brings up the standard Windows file selection dialog and allows the user to navigate to a particular folder and select one or more files to import.

The most interesting option for Salesforce Documents, however, is Bulk Import. Bulk Import allows the selection of a folder and for ccScan to automatically walk through this folder (optionally recursively so all subfolders and their subfolders are included) and import all files that match one more wildcards (such as \*.\*, \*.pdf, ccitt\_?.tif?, etc). Even wildcards can be specified to exclude certain types of files. Also, for files containing scanned images only, there is an option to combine all files into a single file and import only this combined file (optionally de-skewing the images first).

In Bulk Import Folder either enter the name of the folder to traverse (or select from a list of folders). The wildcard specification to include files is entered in Bulk Inclusion Pattern while the wildcard specification to exclude files is entered in Bulk Exclusion Pattern. To recursively traverse subfolders enable Bulk Folder Recursion.

#### **Run this Import Job**

Once the Import job has been created it can be run over and over again in User mode. The job is started with the Start Job button.

🚑 ccScan							
<u>File View Scanner Jobs Page Admin H</u> elp							
ァ 🍓 好 💥 🍇 🛛 Fit Ir	🜮 چ 🌠 💥 🌆 Fit Image 🛛 🔂 🔍 🔍 12% 🛛 🚿 🌂 Page: 5 - 5 🛛 ┥ ┥ 🕨 🕨 🕪 🖛						
Available Jobs			, đ	Deed04.pdf		4 ک	
Description File Import to Salesforce Docur Import Bulk to Salesforce Docu	nents Import	Repository Salesforce® Do Salesforce® Do	4 111 +				
🛃 Available Jobs 🚦 Index/Q	A Jobs 🚦 Views			D192132490 SHANKS THITTER & LEDBETT 11 GREENWAY PLAZA 10TH FLOOR	IR		
Import Bulk to Salesforce Doc	uments		д	HOUSTON, TX	77045		
Field Name	Value			-WARNING-THIS IS PART OF THE			
Salesforce Folder:	Property	•••	^	T O: SHANKS	ANT COUNTY T NDERSON COUNT IAL RECEIPT TRITTER & LEDBETTER		
Document Name:	Deed%c4:00%			RECEIPT NO REGI 192242734 DR		ED DATE TIME 9/92 15:19	
Description:	Sample job	*		INSTRUMENT FIRCE FILED TIME 1 D152132490 ND 920709 15:19 CK 55338 7 O T A L : DOCUMENTS: 01 F E E S: 6:00			
Keywords:	ccScan, scan to the clo	oud 🔶	B V: ANY PROVIDION WITCH REPRICES THE SALE REWAL OR USE OF THE DESCLIED HEAL PROPERTY BECAME OF COLO OF ACCE IS INVALID AND UNERVOCENCE UNCE WHEN FIGURAL LAW.			L OR USE LOR OF RACE	
Internal Use Only:	Enabled		Ξ	IS INVALID AND UNENFOR	CEABLE UNDER PEDERAL L	AN.	
Externally Available:	Enabled						
Upload Documents: Always Create New							
Document ID:	015E0000000tdUQIAY	,		Log		<b>-</b> ₽ X	
Import				Date/Time	Action	Job Descriptio	
Document Format:	PDF	-		3/21/2012 8:59:43 PM	ExportDoc Export lab	File Import to S	
JPEG Quality:	Good	<b>_</b>		3/21/2012 8:59:44 PM 3/21/2012 9:27:14 PM	ExportJob ExportDoc	File Import to S Scan to Salest	
Bulk Import Folder:				3/21/2012 9:27:14 PM	ExportJob	Scan to Sales	
	C:\ccScanData\Import			3/21/2012 9:30:48 PM	ExportDoc	Import Bulk to	
Bulk Inclusion Pattern:	Deed*.tif		Ψ.	3/21/2012 9:30:48 PM	ExportJob	Import Bulk to \$	
Va	lidate Start Import	Cancel		🔹 🛄 🛃 Mini-Tutoria	als 🚦 Prefere	ences 📴 Config	
Document Count: 1 Pages	Current Document: 5 Tot	tal Pages Proces	sed:	5	Scn	Imp Ocr Exp	

#### Figure 7 - Run this Import Job

Typically jobs are configured so that the operator must enter at least a document name unless the new document must be named after the imported document. Optionally the operator can enter or select a Salesforce folder name where the imported document will be stored.

Copyright © 2011-2013 by Capture Components, LLC. All rights reserved. Capture Components, LLC encourages the reader to freely share and distribute this White Paper.

Once the job is started, ccScan disables the Start Import button and does not allow any changes to the form. However, the operator is allowed to press the Cancel button. To provide visual feedback, the imported pages are displayed while the job is running.

### **Annotation and Redaction**

It is not uncommon to annotate or redact selected paragraphs of documents that are shared. For example, redaction is used routinely in the legal sector. To allow review, correction, or annotation of documents before they are stored in Salesforce Documents, ccScan provides an optional Index/QA mode. This mode can be enabled on a per-job basis by checking the Index/QA Later field. When enabled the documents produced with a Scanning or Import job are cached locally and made available in the Index/QA tab of ccScan.

🤗 ccScan	100	
<u>File View Scanner Jobs</u>	<u>P</u> age <u>A</u> dmin <u>H</u> elp	
γ 🍓 🛃 💥 🌉 🛛 Fit Image •	🕀 🔍 🔍 19% 🛛 🎽 🔀 Page: 1	
Index/QA Jobs	▼ Д	Document 4 b
Description Date/Time	Created Machine Operator Action	
File Import to Salesforce 8/7/2011 1:1	11:55 PM JB-LAPT Peter Index	
•	4	
Available Jobs 🛃 Index/QA Jobs	🔁 Views	
File Import to Salesforce	<b>-</b> ₽	
Field Name	Value	75263 0005
Export		-WARNING-THIS IS PART OF THE OFFICIAL RECORDDO NOT DESTROY
Salesforce Folder:	Property	
Document Name:	Deed15	FILED TARRANT COUNTY TEXAS SUZANNE HENDERSON COUNTY CLERK OFFICIAL RECEIPT
Description:	Enter document description here	T O: TRINITY-WESTERN TITLE CO
	-	RECEIPT NO REGISTER PRINTED DATE TIME 192242471 DR93 07/09/92 14:31
Keywords:	ccScan, scan to the cloud	INSTRUMENT FEECD FILED TIME 1 D192132265 DT 920709 14:31 CK 16942
		1 D192132265 D1 920109 4102 CK 1092
Internal Use Only:	Enabled	TOTAL: DOCUMENTS: 01 FEES:
Externally Available:	Enabled	
Upload Documents:		
opidad Documents.	Always Create New 🔻	в У:
		ANY PROVISION WHICH RESTRICTS THE SALE RENTAL OR USE OF THE DESCRIBED REAL PROPERTY BECAUSE OF COLOR OR RACE
		IS INVALID AND UNENFORCEABLE UNDER FEDERAL LAW.
		Example of redaction and annotation
Validate	Start Export Cancel	10699 0860
ОК		Scn   Imp   Ocr   Exp

Figure 8 - Index/QA Mode

Before releasing the documents to Salesforce from Index/QA, descriptive information can be added to index fields, and pages can be deleted or inserted. Index information can be

entered manually using the keyboard or extracted automatically from selected zones of the image using OCR (Optical Character Recognition).

In addition, pages can be annotated with text and selected portions of the pages could be redacted. Note that the annotations and redactions become permanent once they are saved and cannot be removed later.

#### Afterword

We at Capture Components LLC hope that this White Paper is of benefit to you. If it is and you are able to conveniently and efficiently capture and import your documents to Salesforce Documents, then we have achieved a measure of success. If you choose to use ccScan as your document capture application, we will do our best to provide you with the highest quality product and support.

Visit us at http://www.capturecomponents.com