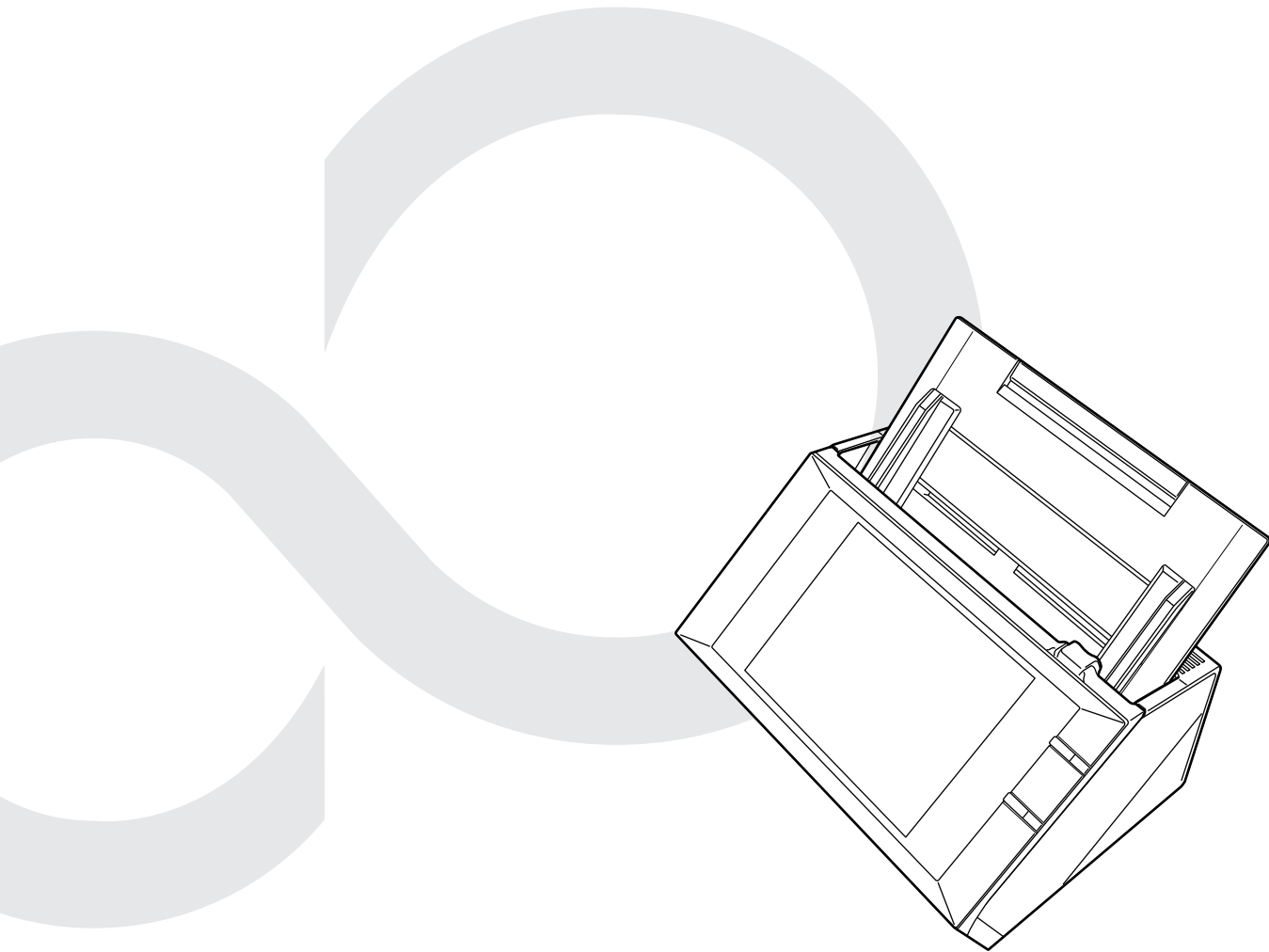


# ScanSnap N1800 Network Scanner

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## Salesforce Chatter Add-in User's Guide



# Contents

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- Introduction ..... 4**
  - **About This Manual ..... 4**
  - **Opening Help ..... 5**
  
- Chapter 1 Overview ..... 6**
  - 1.1 Features of the Salesforce Chatter Add-in ..... 7**
  - 1.2 System Requirements ..... 8**
  
- Chapter 2 Installation/Uninstallation ..... 10**
  - 2.1 Installing the Salesforce Chatter Add-in ..... 11**
  - 2.2 Uninstalling the Salesforce Chatter Add-in ..... 13**
  
- Chapter 3 Regular User Operations ..... 14**
  - 3.1 Posting the Scanned Data to Salesforce Chatter ..... 15**



# Introduction

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Thank you for using the Salesforce Chatter Add-in.

This manual aims to provide administrators and regular users with an overview of the Salesforce Chatter Add-in, and instructions on its installation, uninstallation, and operations.

We hope that this manual will provide you with useful information in order to utilize the Salesforce Chatter Add-in.

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## ■ About This Manual

### Symbols Used in This Manual




The following symbols are used in this manual:



This symbol alerts operators to particularly important information. Be sure to read this information.



This symbol alerts operators to helpful advice regarding operations.

<p style="text-align: center;">Admin</p>	<p>This symbol is used to indicate information about administrator operations. Each operation method is indicated by the following symbols:</p> <ul style="list-style-type: none"> <li>●  Administrator operating via the LCD touch panel.</li> <li>●  Administrator operating via the network interface using the Network Scanner Admin Tool.</li> <li>●  Administrator operating via the network interface using the Scanner Central Admin Console.</li> </ul>
<p style="text-align: center;">User</p>	<p>This symbol is used to indicate information about regular user operations.</p>

## Screen Examples in This Manual

The screen examples in this manual are subject to change without notice in the interest of product improvement.

The actual windows and operations may differ depending on the operation method. If the actual screen differs from the screen examples in this manual, operate by following the actual displayed screen.

## Abbreviations Used in This Manual


The following abbreviations are used in this manual:

Abbreviation	Name
Admin Tool	Network Scanner Admin Tool
Central Admin Console	Scanner Central Admin Console
Scanner	ScanSnap N1800

## ■ Opening Help

When the [Help] button is available on the window or dialog box that is displayed during the operation, you can open Help by pressing it.

Help provides information about items on the screens and actions to take for the messages.

On the touch panel, the Help button is displayed as .

# Chapter 1

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## Overview Admin User

This chapter provides an overview of the Salesforce Chatter Add-in.

- 1.1 Features of the Salesforce Chatter Add-in ..... 7
- 1.2 System Requirements ..... 8

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## 1.1 Features of the Salesforce Chatter Add-in

The Salesforce Chatter Add-in is an application used for posting scanned data to Salesforce Chatter.

Posting scanned data to Salesforce Chatter enables scanned data to be viewed from anywhere at anytime by logging into Salesforce Chatter via a Web browser.

For details about how to install and uninstall the Salesforce Chatter Add-in, refer to ["Chapter 2 Installation/Uninstallation" \(page 10\)](#).

For the Salesforce Chatter Add-in, the following is regarded as user information.

- User name, password, and security token used for Salesforce authentication on the [Salesforce Authentication] window
- List of accounts (up to five user names)
- Posting method, setting for whether to post a message, posting destination
- Scan settings
- Setting for whether to remember the password
- Message and description for posting
- File name format

When scanner user information is backed up and restored, this information is also backed up and restored.

For details about how to back up or restore user information, refer to the Operator's Guide of the ScanSnap N1800.

## 1.2 System Requirements

The Salesforce Chatter Add-in runs under the following conditions:

Scanner	System Version
ScanSnap N1800	ss001 01.01.01.0046 or later

Access to the Internet must be possible for using the Salesforce Chatter Add-in and posting to Salesforce Chatter.

A Salesforce account that is enabled for posting to Salesforce Chatter must be created in advance.





# Chapter 2

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## Installation/Uninstallation Admin

This chapter explains how to install and uninstall the Salesforce Chatter Add-in. For details about operations of the ScanSnap N1800, refer to the Operator's Guide of the scanner model.

<b>2.1 Installing the Salesforce Chatter Add-in.....</b>	<b>11</b>
<b>2.2 Uninstalling the Salesforce Chatter Add-in.....</b>	<b>13</b>

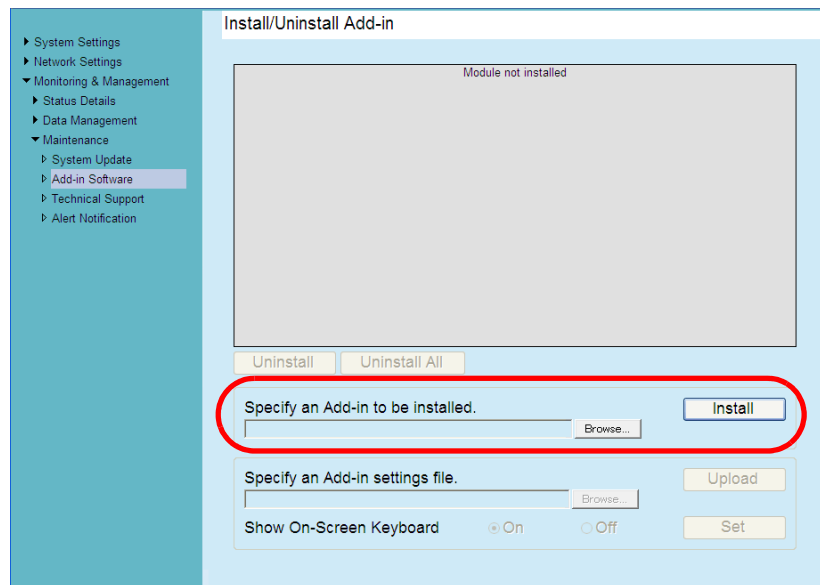
## 2.1 Installing the Salesforce Chatter Add-in



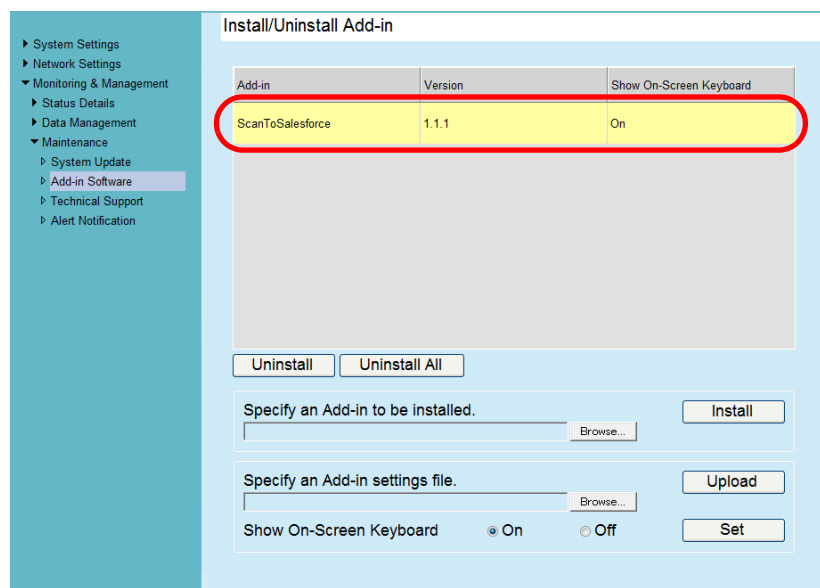
The Salesforce Chatter Add-in can be installed by selecting "NetScanner\_ScanToSalesforce\_1.1.1" on the [Add-in Software] window, and pressing the [Install] button.



"1.1.1" in the name of the file to be installed indicates the version. The version may change when a new file is provided for the Salesforce Chatter Add-in.



When the Salesforce Chatter Add-in is installed, "ScanToSalesforce" is shown in the list.

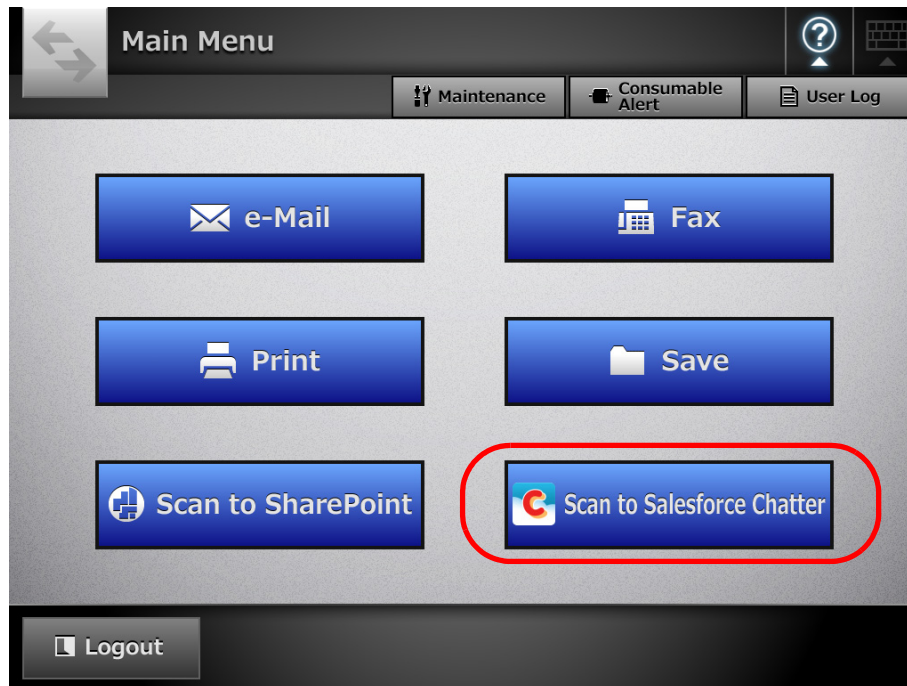




There is no need to configure an Add-in settings file or set whether to show the keyboard.  
The keyboard can be shown regardless of the [Show On-Screen Keyboard] setting.

On the regular user's [Main Menu] and [Job Menu] window, the [Scan to Salesforce Chatter] button is shown.

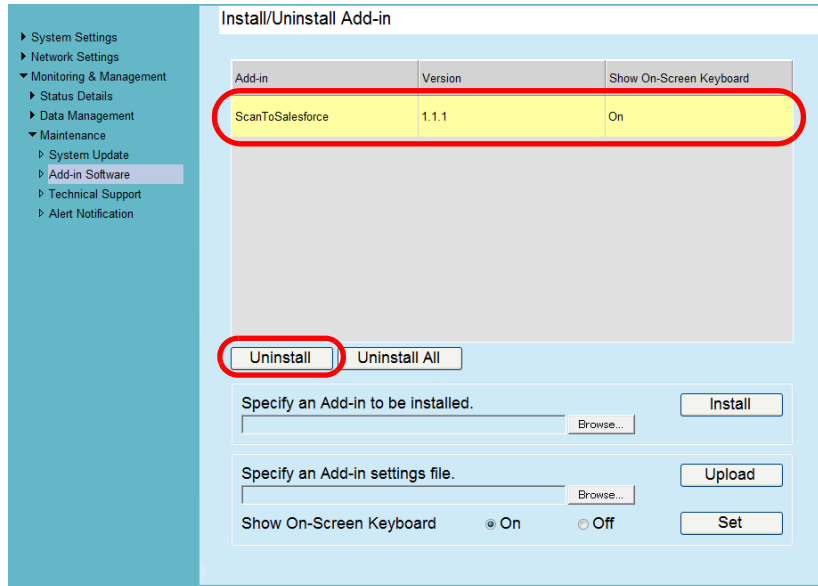
Example: On the [Main Menu] window, the button is shown as below.



## 2.2 Uninstalling the Salesforce Chatter Add-in



The Salesforce Chatter Add-in can be uninstalled by selecting "ScanToSalesforce" on the [Add-in Software] window, and pressing the [Uninstall] button.



When the Salesforce Chatter Add-in is uninstalled, "ScanToSalesforce" is deleted from the list.

User information for the Salesforce Chatter Add-in is not deleted.

# Chapter 3

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## Regular User Operations User

This chapter explains regular user operations after the Salesforce Chatter Add-in is installed.  
For details about operations of the ScanSnap N1800, refer to the Operator's Guide of the scanner model.

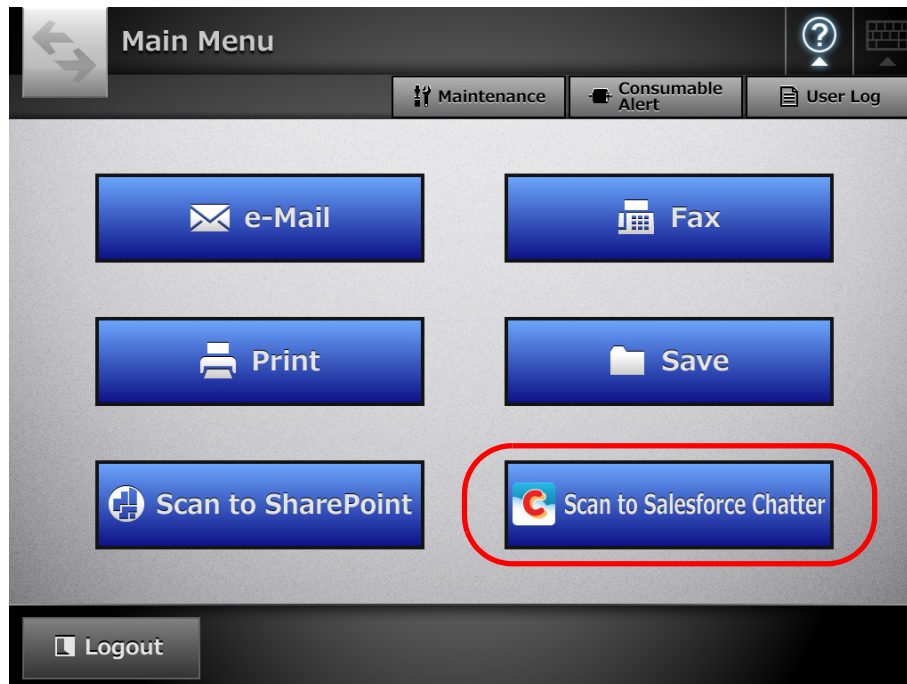
**3.1 Posting the Scanned Data to Salesforce Chatter..... 15**

## 3.1 Posting the Scanned Data to Salesforce Chatter

Post the scanned data to Salesforce Chatter.

Up to 100 files can be posted to Salesforce Chatter at one time.

1. On the [Main Menu] or [Job Menu] window, press the [Scan to Salesforce Chatter] button.



⇒ The [Salesforce Authentication] window appears.


When the following conditions are satisfied, Salesforce authentication is performed for the previously used Salesforce account and the [Scan to Salesforce Chatter] window appears.

- If you logged in with an account other than a guest account
- If the password was set to be remembered

2. Enter a user name and password for logging into Salesforce. When you are logged into the scanner with an account other than a guest account, select whether to remember the password.

The screenshot shows a dialog box titled "Salesforce Authentication". It contains three input fields: "User Name" with the text "jane.talwar@pfe.com", "Password" with "\*\*\*\*\*", and "Security Token" with a blurred string. Below these fields is a "Remember password?" section with a dropdown menu set to "Yes". At the bottom are "Cancel" and "OK" buttons.



If you have logged into Salesforce before, you can select the previously used user name from the [Account List] window, which is shown by pressing .

The screenshot shows a dialog box titled "Account List". It contains a list of user names, with "jane.talwar@pfe.com" selected. A "Close" button is located at the bottom right.



**3. Press the [OK] button.**

⇒ The [Scan to Salesforce Chatter] window appears.

**Scan to Salesforce Chatter**

User Name  
[Blurred Name]

Method: Post to Chatter


Post Message: On



Post to: My Feeds

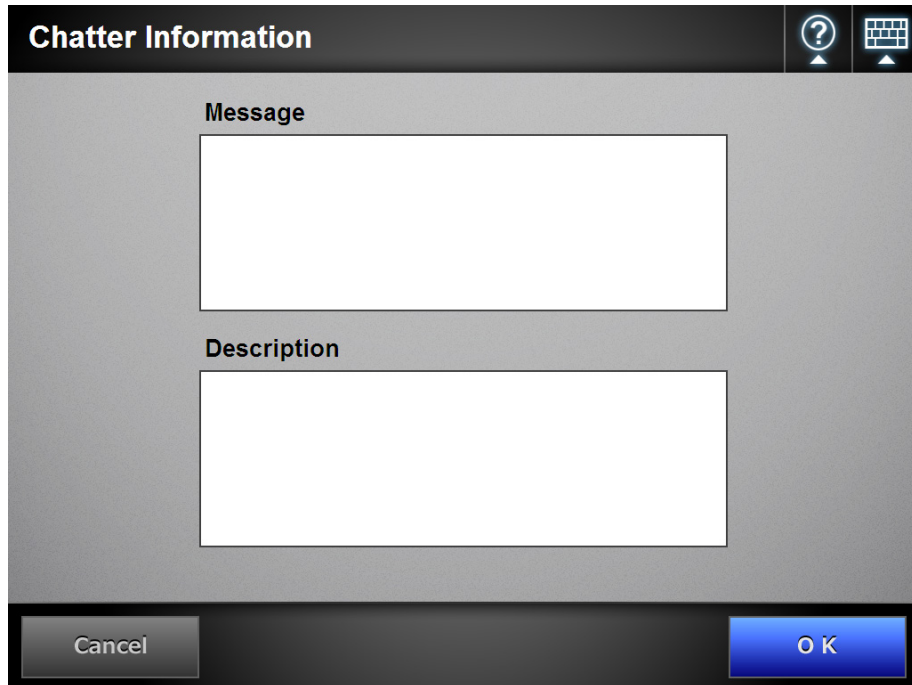
File Name: [Blurred Name]\_05\_10\_19\_06\_43

Cancel Scan Settings Default Scan Viewer On Scan



To change the scan settings, press  for [Scan Settings]. For details, refer to the Operator's Guide of the ScanSnap N1800.

4. Press  for [Method], and select a method for posting scanned data.
- For [Post to Chatter], select whether to post with a message for [Post Message].  
To post a message, press , and enter a message on the [Chatter Information] window.



**Chatter Information**

Message

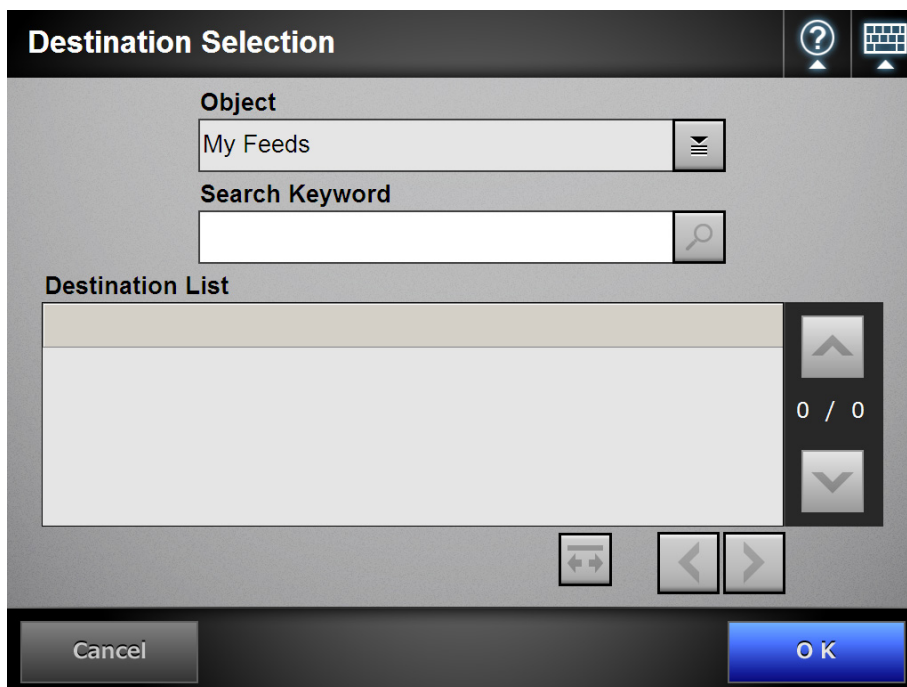
Description

Cancel OK

- For [Post as an attachment], messages cannot be posted.

5. Press  for [Post to].

⇒ The [Destination Selection] window appears.



**Destination Selection**

Object  
My Feeds

Search Keyword

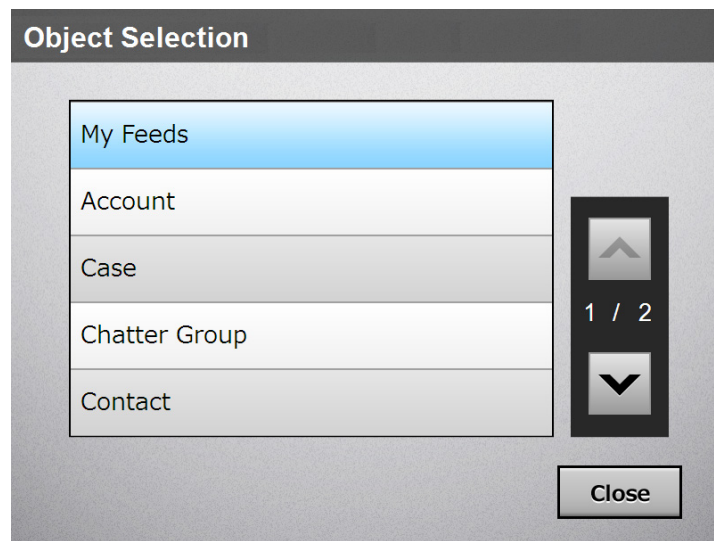
Destination List  
0 / 0

Cancel OK

---

6. Press  for [Object].

⇒ The [Object Selection] window appears.




7. **Select an object for a destination.**

⇒ In [Destination List] on the [Destination Selection] window, a list of destinations are shown according to the selected object.

8. **Select a destination in [Destination List], and press the [OK] button.**




To filter destinations to be shown in the destination list, enter a search string in

[Search Keyword], and press .

Destinations containing the search string are shown.


⇒ The selected destination is shown in [Post to].

**9. For [File Name], enter a file name for the scanned data to be posted to Salesforce Chatter.**



- The following file names cannot be used:
  - CON
  - PRN
  - AUX
  - CLOCK\$
  - NUL
  - COM0 - COM9
  - LPT0 - LPT9
- The following symbols cannot be used:  
 \ / \* " : < > ? |



On the [File Name] window which is shown by pressing  for [File Name], a default file name format can be selected.

**File Name**

File Name Format

Use the current time as a file name

eg: 04\_26\_10\_19\_34

Cancel OK

**10. Press the [Scan] button.**

**When [Scan Viewer] is [Off], press the [Scan&Post] button.**

⇒ The scanning starts.

⇒ The procedures after scanning or for viewing the scanned data are the same as when scanned data is sent via e-mail or saved to a folder. For details, refer to the Operator's Guide of the ScanSnap N1800.

**11. When the posting process is completed, the [Main Menu] or [Job Menu] window is shown again.**



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## **ScanSnap N1800 Network Scanner**

### **Salesforce Chatter Add-in User's Guide**

**P3PC-3812-01ENZ0**

**Issue date June 2011**

**Issued by PFU LIMITED**

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