



CARD CAPTURE AI

DESIGN FOR YOUR BUSINESS.

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Acknowledgements

The **SIC Development Team** would like to thank you for the interest you have shown in **Card Captur AI**.

Your choice motivates us every day to go further, improving and innovating this product with dedication, in order to offer you new releases capable of making your experience increasingly smooth, powerful, and meaningful.





INDEX

PRODUCT INFORMATION

It provides an overview of the product's functionalities, key features, and operational benefits, illustrating how the solution supports and optimizes business processes.

PRODUCT CONFIGURATION

It shows how the product can be configured, outlining the main available options and the benefits of proper parameterization based on business needs.

DESKTOP MODE USAGE

It describes the use of the product in desktop mode, outlining the main available features and the operational benefits in terms of efficiency, control, and productivity.

MOBILE MODE USAGE

It illustrates the specifics of the mobile experience, highlighting the features optimized for smartphones and tablets, as well as the advantages related to real-time data collection and management, wherever you are.

SUPPORT

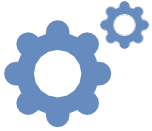
It provides an overview of the support services delivered upon customer request, highlighting targeted and customized interventions designed to accompany the evolution of the solution and maximize its value over time.

CONTACTS

It gathers the main useful references, including contact channels and in-depth links, to facilitate access to support, documentation, and online resources.



PRODUCT INFORMATIONS



CARD CAPTURE AI was built natively on the Salesforce platform to ensure maximum integration, security, and consistency with CRM processes.

The solution is designed to naturally extend Salesforce's functionalities, delivering an experience that is fully aligned with and integrated into the customer's business processes.



01

Salesforce Editions

- Salesforce Classic
- Enterprise Edition
- Unlimited Edition
- Salesforce Partner Community and related variants



02

Languages

With the installation of **Card Capture AI**, the following languages are also automatically installed and configured:

- English
- Italian
- French
- Spanish
- German



03

Package Contents

With the installation of **Card Capture AI**, the following metadata components—required for the correct functioning of the application—are also automatically installed and configured.

Type	#	Type	#
App	2	Lightning Page	2
Apex Class	21	Lightning Web Component	11
		Bundle	
Action	1	List View	1
Apex Trigger	4	Page Layout	4
Asset File	2	Permission Set	1
Custom Field	45	Remote Site	1
Custom Object	4	Static Resource	5
Tab	4		

Installation and Integration

Card Capture AI is a solution developed natively on Salesforce that allows you to :

- scan business cards, photographs, or screen captures
- automatically create Leads, Contacts, or Person Accounts in Salesforce

Card Capture AI leverages:

- advanced OCR processes to convert images into text
- AI processes to refine text not fully converted by OCR and to enrich the information with any additional data

This ensures that the most complete and accurate information possible is available in Salesforce

Card Capture AI :

- works directly within Salesforce and Salesforce Mobile, without requiring the installation of any additional applications
- automatically inherits the configurations defined for the current user, including visibility settings, data entry layouts, validation rules, required fields, and visibility on objects and record types

Card Capture AI :

- ensures reliable creation of Leads, Contacts, and Person Accounts, as well as their subsequent management in line with the customer's Salesforce configuration for each specific user, avoiding data duplication and the entry of incomplete information.



Installation and Integration

Card Capture AI is a solution designed to be fast and intuitive.

Thanks to a one-click process, the app can be installed and integrated immediately, ensuring easy adoption and full native integration with the existing Salesforce environment.



Centralized Installation on the Customer's Salesforce Org

Card Capture AI is installed directly on the customer's Salesforce org and is centrally managed by the IT department or an advanced user, ensuring governance, security, and full control of the application environment.



100% Native Salesforce Solution

Developed according to Salesforce guidelines and best practices, the solution ensures reliability, long-term continuity, and full integration with the Salesforce ecosystem, both in desktop and mobile environments.



Native and Extensible Multilingual Support

It natively includes Italian, English, French, German, and Spanish, with the ability to easily extend support to other languages already managed within the customer's Salesforce org, making it ideal for international organizations.



Integrated OCR and Artificial Intelligence

Advanced OCR and AI capabilities are natively integrated into the solution, with no need for external components or additional integrations, delivering immediate value and a seamless user experience.



Configuration and Administration

Card Capture AI is designed to easily adapt to business processes and organizational needs.

Its administration features enable centralized and controlled management, allowing Salesforce administrators to configure the product quickly, securely, and in line with company policies



Centralized Configuration on the Customer's Salesforce Org

Card Capture AI is configured directly on the customer's Salesforce org and centrally managed by the IT department, ensuring consistency, control, and alignment with company policies



Centralized Management of Users and Licenses

The IT department can activate or deactivate Salesforce users directly from the platform, with the flexibility to add individual licenses beyond the base package.



Mapping of Standard and Custom Salesforce Fields

The solution includes preconfigured mapping for standard Salesforce fields and allows dynamic selection of custom fields, reducing configuration time and accelerating adoption.



Selection and Management of Mapping for Leads, Contacts, and Person Accounts

Data mapping can be configured for Leads, Contacts, and Person Accounts, ensuring complete coverage of the main Salesforce objects.



Usage and User Experience

Card Capture AI is designed to deliver a simple, intuitive, and immediate user experience.

Usable seamlessly on both desktop and mobile, it allows users to capture and manage data quickly and naturally within the Salesforce ecosystem, wherever they are, improving productivity and reducing manual tasks.



Direct Access via Salesforce Tab

- **Card Capture AI** is available as a native additional tab within Salesforce and can be used:
 - on standard Salesforce Mobile
 - on Desktop
 - within the context of Salesforce Campaigns



Consistent User Experience Across Mobile and Desktop

The interface is designed to deliver a uniform and intuitive experience, allowing users to work without changing tools, both on the go and from a desktop workstation.



Automatic and Sequential OCR and AI Processes

OCR and Artificial Intelligence processes are executed automatically and sequentially to extract, enrich, and complete data, minimizing manual activities.



Data Stored Natively in Salesforce

Data is saved directly in Salesforce, is accessible from both mobile and desktop, and remains the property of the company. The information does not reside on the user's device, ensuring security and compliance, and allows Leads, Contacts, or Person Accounts to be created at a later time as well.



Data Visibility and Management

Card Capture AI ensures advanced management of the visibility of captured data, fully configurable through a centralized control and governance model. This approach makes it possible to precisely define different access levels, ensuring security, compliance with company policies, and full control of information for each type of user.



Configurable Visibility Between Personal Scope and Campaigns

Card Capture AI allows different visibility levels to be set for capture and scanning activities, distinguishing between personal operations and activities related to Salesforce Campaigns.



Personal Business Card Scans with Private Visibility

Scans and business cards captured at an individual level can be managed with private visibility, allowing users to work on their own data in a confidential and controlled manner.



Campaign-Related Data with Shared Visibility

Scanning activities and data associated with Salesforce Campaigns can be configured with public or shared visibility, making them accessible to authorized teams for follow-up activities and analysis for each specific Campaign.



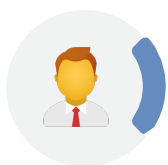
Centralized Control and Governance

Visibility rules can be configured centrally by IT, ensuring consistency with Salesforce security models and company data management policies.



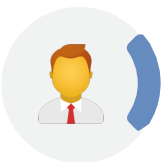
Lead, Contact e P. Account Creation

Card Capture AI allows Leads, Contacts, or Person Accounts to be created at any time using exclusively the rules already configured in the customer's Salesforce org, including record types, layouts, and active automations, ensuring full consistency with business processes and the permissions defined for each user.



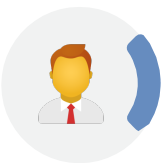
Data Entry Aligned with Salesforce Business Rules

The creation of Leads, Contacts, and Person Accounts is carried out using layouts and record types already defined for each user, including required fields and data entry rules. This ensures consistent data entry, high data quality, and full compliance with the company's Salesforce org configuration (assignment rules, visibility, deduplication, etc.)



Data Quality Guaranteed from the Source

The information entered automatically follows the same company policies normally applied in Salesforce, avoiding inconsistencies and ensuring that every new record is complete, valid, and ready for use by sales and marketing teams.



Fast Upload of Images from Catalogs or Websites

The solution allows photos from catalogs, websites, or local files to be used directly from desktop, speeding up the association of images with records and facilitating the identification of acquired contacts.



Immediate Association with Salesforce Campaigns

Business cards, Leads, Contacts, and Person Accounts can be associated with a specific Salesforce Campaign either during creation or at a later stage. This enables accurate tracking of activities and improves marketing performance analysis.



OFF LINE Mobile Mode (add-on)

Card Capture AI can also be used in offline mode, allowing users to continue working and capturing information even without connectivity. To enable this functionality, the Salesforce Mobile App Plus is required, with automatic data synchronization as soon as the connection is restored.



Mobile Operation Even Without Connectivity

Card Capture AI allows users to work on mobile devices even in offline mode, enabling the capture of business cards and information without an Internet connection (e.g., trade shows, events, or environments with limited connectivity).



Deferred Data Transmission to Salesforce

Data collected in offline mode is automatically synchronized and transmitted to Salesforce as soon as connectivity becomes available, ensuring operational continuity and data integrity.



Salesforce Mobile App Plus License Requirement

Using offline mode requires the mobile version with a specific Salesforce Mobile App Plus license, which is necessary to enable advanced offline usage and data synchronization features.



Continuous and Secure User Experience

Even in offline mode, users maintain a consistent user experience, while data management and storage remain aligned with Salesforce security policies.



Pardot e Marketing Cloud (add-on)

Card Capture AI is integrated with **Pardot** and **Marketing Cloud** and enables the direct creation of contact records within these platforms, in full compliance with existing marketing processes. The solution reduces manual activities, improves data quality, and enables an end-to-end flow—from contact capture to the immediate activation of marketing initiatives.



Native Integration with Salesforce Marketing Solutions

The solution can be extended through a dedicated add-on that enables direct integration with Salesforce Marketing platforms such as Pardot (Marketing Cloud Account Engagement) and Marketing Cloud.



Direct Creation of Marketing Records

Thanks to the add-on, it is possible to create different types of Contact records directly within Pardot or Marketing Cloud, without intermediate steps, speeding up the activation of marketing campaigns.



Alignment with Existing Marketing Processes

The generated records comply with the structures and rules already defined in the marketing platforms, ensuring data consistency and operational continuity between Sales and Marketing.



Use of Existing Salesforce Flows in the Customer's Org

The add-on allows existing Salesforce Flows in the customer's org to be activated and leveraged, integrating the solution into automation processes already in use (nurturing, assignments, qualification, data enrichment, etc.).



Campaign Badge Scanner (add-on)

Card Capture AI is designed to integrate natively with lead retrieval and badge scanning services provided by trade fair organizers, enabling the automatic capture and association of visitor information with a specific trade show or event. This simplifies contact management and maximizes the value of sales follow-up activities.



To implement the integration, the customer must provide a detailed description of the lead retrieval service used by the specific trade fair, including the technical integration methods. This information can be requested directly from the event organizer in order to enable proper connection with the systems used to manage data for the specific event.



Based on the information provided by the customer, Card Capture AI will provide a dedicated service for the specific integration. This service will be activated and made available only after the customer acquires the specific integration service, which is valid for the single edition of the relevant trade fair or event

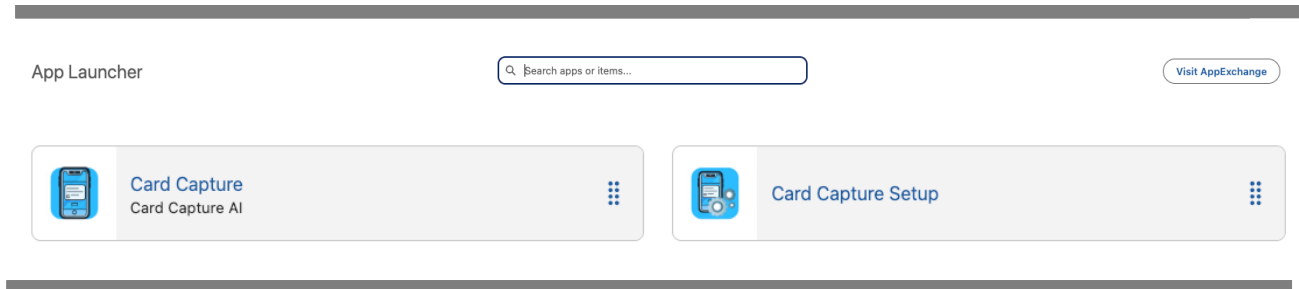


Once the integration has been developed, it can also be reused for subsequent editions of the same trade fair or event, simply by updating the authentication credentials provided by the event organizer to the customer when the lead retrieval service is purchased for each specific edition of the event or trade show.

SALESFORCE Configuration



Card Capture Configuration



With the installation of **Card Capture AI**, two dedicated applications are automatically installed in the system: **Card Capture**, for the operational use of the solution, and **Card Capture Setup**, for configuration and management of settings.

The **Card Capture Setup** app provides the main Salesforce app configuration features through the following sections:

- License Management
- Settings
- Field Mapping

The **Card Capture** app provides the main features for the operational use of the app through the following sections:

- Card Capture
- Campaigns

It is the responsibility of the customer's Salesforce system administrator to correctly configure access to and usage of the applications and the tabs they contain, defining the appropriate permissions for the Salesforce users who will be enabled to use the solution.

The configuration must also necessarily include enabling and setting up the standard Salesforce mobile app, in order to ensure full use of the solution in mobile mode as well, guaranteeing operational consistency, security, and a uniform user experience across all devices.



Configurazione CARD CAPTURE SETUP



Card Capture Configuration



Card Capture Configuration

License Management

Settings

Field Mapping

The **Card Capture Configuration** app provides the main configuration features of the Salesforce app through the following sections:

- **License Management**
Allows administrators to manage application licenses, assign them to users, and monitor usage, ensuring proper access control.
- **Settings**
Enables configuration of the application's general settings, adapting its behavior to business needs (for example, activation options, global preferences, or default behaviors).
- **Field Mapping**
Allows definition of the mapping of data captured by the app to Salesforce objects and fields, ensuring that information is stored correctly and in alignment with the Salesforce data model.

Through these sections, administrators can fully configure the Card Capture app, managing access, behavior, and data integration within the Salesforce organization.



License Management

Configuration Manage Licenses						Product Info
* Show	All	Available Licenses: 10		Assigned Licenses: 1		
License Number	Subscription	License Activation Date	Next Renewal Date	Subscription End Date	User	Status
L-0000000091	A-000019	19/11/2025	19/11/2026		Admin Sic	☒
L-0000000092	A-000019	19/11/2025	19/11/2026			☒
L-0000000093	A-000019	19/11/2025	19/11/2026			☒
L-0000000094	A-000019	19/11/2025	19/11/2026			☒
L-0000000095	A-000019	19/11/2025	19/11/2026			☒
L-0000000096	A-000019	19/11/2025	19/11/2026			☒
L-0000000097	A-000019	19/11/2025	19/11/2026			☒
L-0000000098	A-000019	19/11/2025	19/11/2026			☒
L-0000000099	A-000019	19/11/2025	19/11/2026			☒
L-0000000100	A-000019	19/11/2025	19/11/2026			☒

The **License Management** section allows administrators to centrally manage Salesforce application licenses and their usage by users.

Through this screen, it is possible to:

- view the list of available licenses and their current status
- review the information associated with each license (for example, license ID, license type, and scope of use)
- assign or revoke licenses for authorized users
- monitor license usage to ensure compliance and proper access to the application
- manage any usage limits or thresholds, when applicable

This configuration makes it possible to maintain full control over access to the Card Capture AI app, ensuring that only authorized users can use the application's features in accordance with the available licenses.



General Settings

Configuration
General Settings

Sharing Settings

Personal Sharing Model: Private

Campaign Sharing Model: Private

User	All	Personal Permissions				Campaign Permissions			
		Create	Edit	Delete	Convert	Create	Edit	Delete	Convert
Admin Sic - (admin.salesforce@salesforceitaliaconsulting.it)	☒	☒	☒	☒	☒	☒	☒	☒	☒

The **General Settings** section allows administrators to centrally manage the application's behavior and user permissions within Salesforce.

In this area, it is possible to:

- define visibility rules for the **Personal Sharing Model**, i.e. for “private” entries, by setting specific visibility as **Private** or **Public**
- specify **Personal Permissions** for each individual user, defining the allowed actions in terms of:
 - create
 - edit
 - delete
 - convert
- define visibility rules for the **Campaign Sharing Model**, i.e. for entries linked to a specific Salesforce Campaign, by setting specific visibility as **Private** or **Public**
- specify **Campaign Permissions** for each individual user, defining the allowed actions in terms of:
 - create
 - edit
 - delete
 - convert

The settings defined in this section have global validity and apply to all enabled users, ensuring consistent application behavior across the entire Salesforce environment.



Fields Mapping

Configuration
Fields Mapping Reset Mapping

Card Field	Lead	Contact
First Name	First Name	First Name
Last Name	Last Name	Last Name
Role	Title	Title
Email	Email	Email
Phone	Phone	Business Phone
Mobile	Mobile Phone	Mobile Phone
Company	Company	

The **Field Mapping** section allows administrators to configure the mapping of fields between the data captured by the application and Salesforce standard or custom objects.

Through this configuration, it is possible to:

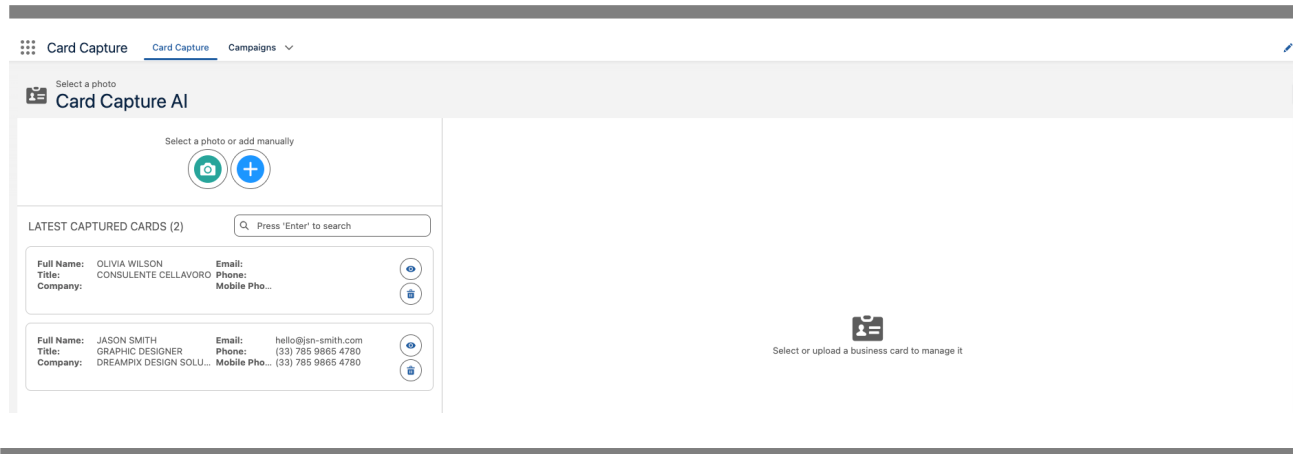
- define, for each field captured by the app (for example: first name, last name, email, phone, company, job title), the destination field—standard or custom—available in Salesforce
- choose the Salesforce object on which to store the data (such as Lead, Contact, or Person Account)
- modify or update field mappings flexibly, without the need for development work
- ensure that collected data is stored correctly and consistently with the organization's data model
- support integration and data quality processes, reducing errors and duplicates

Configuring **Field Mapping** allows Card Capture AI to be tailored to specific business needs, ensuring full alignment between the collected information and the Salesforce data structure.

CARD CAPTURE Configuration



Card Capture



The **Card Capture** app provides the main features for the operational use of the application through the following section:

- **Card Capture**

Through the **Card Capture** tab, each user can easily and independently manage their digitized business cards, in full compliance with the permissions and rules defined by the Salesforce administrator.

The solution allows users to create, view, edit, and delete captured information, as well as convert business cards into Leads, Contacts, or Person Accounts. It delivers a smooth experience that enhances individual productivity while ensuring control, security, and consistency with business processes.



Campaigns

The screenshot displays the Salesforce Campaigns interface. At the top, there's a navigation bar with 'Card Capture' and 'Campaigns' tabs. Below this, the 'Campaigns' section is active, showing a list of campaigns. The first campaign is 'Campagna Business Card'. The interface includes a search bar, filters, and a table of campaigns. The table has columns for Campaign Name, Parent, Type, Status, Start Date, End Date, Respo..., and Owner Alias. The 'Campagna Business Card' campaign is listed with a status of 'In Progress' and a start date of '01/11/2025'. Below the table, there's a detailed view of the 'Campagna Business Card' campaign, showing its details and activity. The details section includes fields for Campaign Name, Active status, Parent Campaign, Type, Campaign Currency, Description, Created By, and Last Modified By. The activity section shows a list of activities, currently empty, with filters for 'All time', 'All activities', and 'All types'.

The **Card Capture** app provides the main features for operational use of the application through the following section:

- **Campaign**

Through the **Campaign** tab, users can:

- easily and immediately view all Salesforce Campaigns visible to them, based on the configured permissions and access rules
- select the campaign of interest, click on the **Card Capture** tab directly within the campaign, and proceed with uploading and managing information according to the campaign's specific configuration—such as capture from business cards, QR codes, or other configured methods

As previously described, data entry, management, and visibility rules may vary depending on the context, distinguishing between personal information management and company-wide campaign-related management, in full compliance with the configurations and governance defined by the organization.



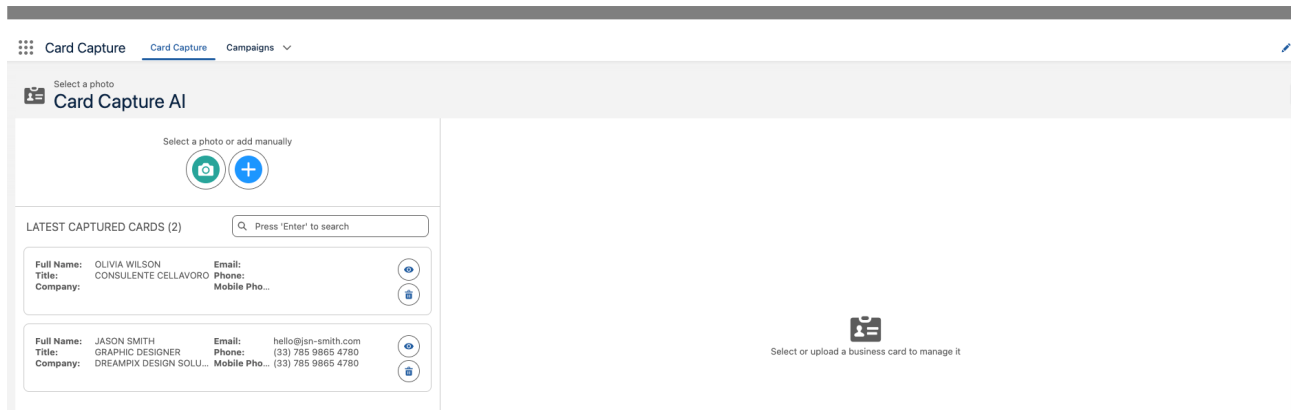
DESKTOP MODE USAGE



CARD CAPTURE



Card Capture



The **Card Capture AI** app offers multiple operational modes for capturing and managing information related to Leads, Contacts, and Person Accounts, ensuring maximum flexibility in any context:

- Scanning via photograph of a business card
- Selecting an existing photo from a PC, tablet, or smartphone
- Capturing information directly from a section of a website containing contact details
- Extracting data from images that include information similar to contact details or a business card
- Manual entry of business and personal data

Card Capture AI therefore enables contacts to be collected quickly, intelligently, and fully integrated within Salesforce, adapting to any operational scenario.

Card Capture

Provides intuitive features for information capture, data viewing, and management, allowing fast and controlled conversion into Leads, Contacts, and Person Accounts, with user-level personalized management.

Campaigns

Provides dedicated features for entering information associated with specific Campaigns, Trade Shows, Exhibitions, or Events, enabling structured and shared data management across different company roles and departments, in compliance with internal processes.

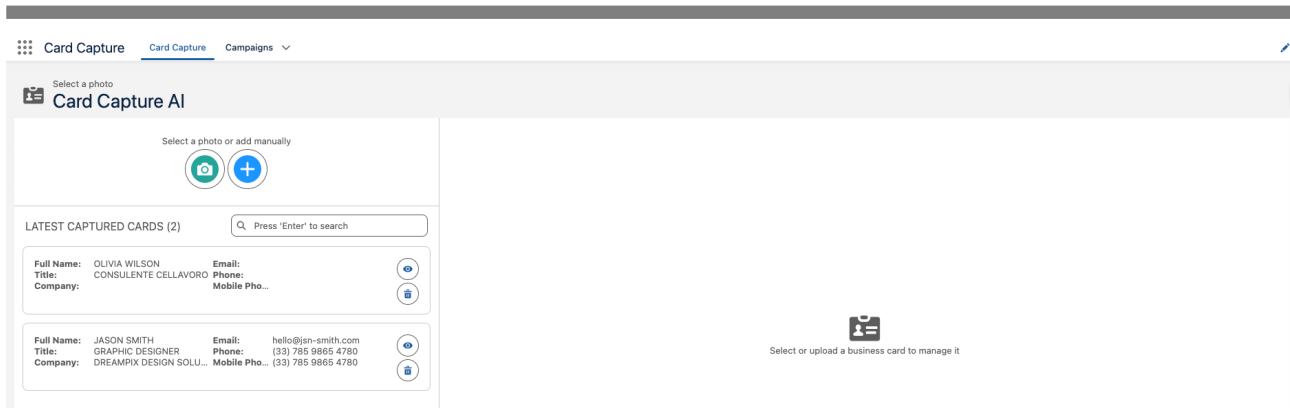
Campaigns – Badge Scanner (Add-on)

This add-on enables scanning of visitor badges provided by major trade fair organizers, through integration with their systems and exhibitor services.

The solution allows structured detection, tracking, and management of all visitors—including hosted buyers—as well as people who visited the booth, attended specific events, or were met during a particular trade show or exhibition, easily associating them with the relevant Salesforce Campaigns.

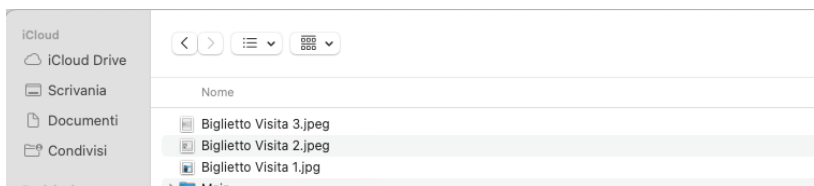


Select Photo



By selecting  the **desktop upload** option, the user can access the file folder on their PC and choose a previously saved photograph.

(In the mobile version, it is possible to access the camera and take a photo of the business card directly.)



By selecting the file to be processed, the following processes are triggered:

OCR Process (Optical Character Recognition)

An OCR process is started to automatically capture the textual information contained in the image (name, company, job title, email, phone number, address).

The image is analyzed, the recognized text is extracted and structured into data fields, which can then be reviewed, edited, and saved.

AI Process

After the OCR process, an AI process is initiated to improve, complete, and normalize the data extracted from the business card.

The recognized information is analyzed by artificial intelligence models that correct potential errors, identify the meaning of fields (first name, last name, company, job title, contact details), complete missing data when possible, and standardize formats (emails, phone numbers, addresses).

The result is a more accurate, consistent, and ready-to-use data set.



Manual Entry

Card Capture

Card Capture

Campaigns

Select a photo

Card Capture AI

Select a photo or add manually



LATEST CAPTURED CARDS (2)

Full Name: OLIVIA WILSON

Title: CONSULENTE CELLAVORO

Company:

Email: Mobile Pho...



Full Name: JASON SMITH

Title: GRAPHIC DESIGNER

Company: DREAMPIX DESIGN SOLU...

Email: hello@jan-smith.com

Phone: (33) 785 9865 4780

Mobile Pho... (33) 785 9865 4780





First Name

Title

Phone

Company

Street

City

Country

Notes

Last Name

Email

Mobile Phone

Website

Zip/Postal Code

State/Province



By selecting  the **manual entry (desktop)** option, it is possible to manually enter the data related to a company and its contact, in cases where a business card or a previously saved photo is not available



Cards Capture AI

This approach ensures that captured information is immediately available as centralized, secure business data fully compliant with CRM processes, avoiding local storage on personal devices (smartphones, tablets, or PCs), with clear benefits in terms of control, security, and operational continuity.

Within the **CAPTURED CARD** object, it is also possible to perform quick text searches to immediately locate a specific business card, view its details, and manage the data comprehensively.

The saved information can be modified, deleted, or converted at any time into a Lead, Contact, or Person Account, ensuring a simple, traceable workflow fully integrated with Salesforce.



Lead Creation

Card Capture Card Capture Campaigns

Select a photo
Card Capture AI

Select a photo or add manually

LATEST CAPTURED CARDS (2) Press 'Enter' to search

Full Name: OLIVIA WILSON Email: Title: CONSULENTE CELLAVORO Phone: Mobile Pho... Company: [Add] [Remove]

Full Name: JASON SMITH Email: hello@j-sm-smith.com Title: GRAPHIC DESIGNER Phone: (33) 785 9865 4780 Mobile Pho... (33) 785 9865 4780 Company: DREAMPIX DESIGN SOLU... [Add] [Remove]

OLIVIA WILSON
CONSULENTE CELLAVORO
hello@j-sm-smith.com
+33 486 10361
333 Boulevard St. Joly City, FR

First Name: OLIVIA Last Name: WILSON
Title: CONSULENTE CELLAVORO Email: Mobile Phone: Website: Street: Zip/Postal Code: City: State/Province: Country: Notes: Any tity

[Add] [Remove]

Lead Creation

Starting from a record available in **Card Capture**, by selecting  the appropriate option it is possible to create a new **Lead** directly within Salesforce.

During the creation process, the application automatically detects whether multiple Lead Record Types are configured in the customer's Salesforce organization and verifies which ones are available to the user performing the operation.

The user can then select the Lead Record Type to use, choosing the most appropriate Lead type based on the operational context or business processes.

Once the Record Type is selected, the specific Lead entry layout for that type is displayed, ensuring consistency with existing Salesforce configurations.

The fields in the layout are automatically populated with the data extracted from the business card (via OCR, AI, or manual entry), reducing data entry time and minimizing the risk of errors.

New Lead

Lead Information

*Lead Status: Nuovo

*Company: DREAMPIX DESIGN SOLUTION

*Name: Salutation: --None--

First Name: OLIVIA

Middle Name: WILSON

*Last Name: WILSON

Suffix:

Lead Owner: Admin Sic

Lead Source: --None--

Email: hello@jason-smith.com

Additional Information

Codice Prodotto:

Description: Any tity

Address Information

Address Search:

Street:

Postal Code:

Buttons: Cancel, Save & New, Save

During Lead creation, the system complies with all Salesforce rules related to required fields, validation checks, and Lead assignment rules, ensuring complete, accurate data entry that is fully aligned with business processes.

Lead: JASON SMITH

Company: DREAMPIX DESIGN SOLUTION

Title: GRAPHIC DESIGNER

Phone (2): (33) 785 9865 4780

Email: hello@jason-smith.com

Lead Status: Nuovo

Lead Owner: Admin Sic

Lead Source: None

Email: hello@jason-smith.com

Additional Information

Codice Prodotto:

Description:

Address Information

Address: 141 17, 11th Floor, M Road Street no 12345 NY

Created By: Admin Sic, 22/12/2025, 18:08

Last Modified By: Admin Sic, 22/12/2025, 18:08

Custom Links

Google Maps

Files (1)

Biglietto Visita 1.jpg

When the Lead is created, the photo originally used is saved in the files linked to the Lead, while the business card record stored in the **Card Capture AI** queue is deleted, so that **Card Capture AI** contains only the records that still need to be converted.



Contact Creation

Select a photo

Card Capture AI

Select a photo or add manually

LATEST CAPTURED CARDS (2)

Full Name: OLIVIA WILSON
Title: CONSULTANT CELLAVORD
Company: [Logo]
Email: [Email]
Phone: [Phone]
Mobile Phone: [Mobile Phone]

Full Name: JASON SMITH
Title: GRAPHIC DESIGNER
Company: DREAMPIX DESIGN SOLUTION
Email: hello@jenn-smith.com
Phone: (33) 785 9865 4780
Mobile Phone: (33) 785 9865 4780

First Name: JASON
Title: GRAPHIC DESIGNER
Phone: (33) 785 9865 4780
Company: DREAMPIX DESIGN SOLUTION
Street: 10-12-13th Floor: M Road Street no
City: [City]
Country: [Country]
Notes: [Notes]

Last Name: SMITH
Email: hello@jenn-smith.com
Mobile Phone: (33) 785 9865 4780
Website: www.jenn-smith.com
Zip/Postal Code: 12345
State/Province: NY

Contact Creation

Starting from a record available in **Card Capture**, by selecting the appropriate option  it is possible to create a new **Contact** directly within Salesforce.

The Contact creation process follows the same operational flow used for Lead creation, ensuring a consistent and guided user experience.

Before completing the creation, it is necessary to specify the **Account** to which the Contact will be associated. The Account can be selected from existing records (via search) or defined according to the Salesforce rules and configurations set by the organization.

SIC

Card Capture

Select a photo

Card Capture AI

Select a photo or add manually

LATEST CAPTURED CARDS (1)

Full Name: OLIVIA WILSON
Title: CONSULTANT CELLAVORD
Company: [Logo]
Email: [Email]
Phone: [Phone]
Mobile Phone: [Mobile Phone]

New Contact

Contact Information

Account Name: Search Accounts... Contact Currency: EUR - Euro

* Name: Salutation: --None--

First Name: OLIVIA

Middle Name: [Middle Name]

* Last Name: WILSON

Suffix: [Suffix]

Chiave Univoca: [Chiave Univoca]

Lingua: --None--

Mobile: [Mobile]

Email: [Email]

Cancel Save & New Save

During Contact creation, the system complies with all Salesforce rules related to required fields and Contact validation checks, ensuring complete, accurate data entry fully aligned with business processes.



When the Contact is created, the photo originally used is saved in the files linked to the Contact, while the business card record stored in the Card Capture AI queue is deleted, so that Card Capture AI contains only the records that still need to be converted.



Person Account Creation

Select a photo

Card Capture AI

Select a photo or add manually

LATEST CAPTURED CARDS (2)

Full Name: OLIVIA WILSON
Title: CONSULTANT CELLAVORD
Company: [icon]
Email: [icon]
Phone: [icon]
Mobile Phone: [icon]

Full Name: JASON SMITH
Title: GRAPHIC DESIGNER
Company: DREAMPIX DESIGN SOLUTION
Email: hello@jason-smith.com
Phone: (33) 785 9865 4780
Mobile Phone: (33) 785 9865 4780

First Name: JASON
Title: GRAPHIC DESIGNER
Phone: (33) 785 9865 4780
Company: DREAMPIX DESIGN SOLUTION
Street: 101 15th Floor, M Road Street no
City: [icon]
Country: [icon]
Notes: [icon]

Last Name: SMITH
Email: hello@jason-smith.com
Mobile Phone: (33) 785 9865 4780
Website: www.jason-smith.com
Zip/Postal Code: 12345
State/Province: NY

[icon] [icon]

Person Account Creation

Starting from a record available in **Card Capture**, it is possible to create a new **Person Account** directly within Salesforce.

The Person Account creation process follows the same operational flow used for Lead and Contact creation, ensuring a uniform and guided user experience.

Creating a Person Account automatically generates both the **Account** and the associated **Contact**, in accordance with Salesforce's standard data model for this type of record.

This functionality is available only if:

- the customer's Salesforce organization has **Person Accounts** enabled;
- the user performing the operation is authorized to create and manage them, based on the assigned permissions.



Creation of Pardot or Marketing Cloud Contacts

Starting from a record available in **Card Capture**, it is possible to directly create Contact records of different types within **Pardot** or **Marketing Cloud**, without intermediate steps, speeding up the activation of marketing campaigns.

This functionality is available when:

- the **Marketing Cloud & Pardot Extension licenses (add-on)** are present
- **Pardot or Marketing Cloud licenses** are available in the customer's Salesforce org

CARD CAPTURE - CAMPAIGNS



Campaigns

	Campaign Name	Parent Cam...	Type	Status	Start Date	End Date	Response...	Owner Alias
1	Campagna Business Card		Other	In Progress	01/11/2025	31/12/2030	0	ASic

Through the **Campaign** tab, users can easily, immediately, and centrally view all Salesforce Campaigns visible to them, based on the permissions and access rules configured by the organization.

By selecting the campaign of interest, users can work directly within it according to the defined rules—adding new visitors, editing information for visitors entered by other users, adding specific comments related to visitor interest, and converting visitors into Leads, Contacts, or Person Accounts.

Details		Card Capture	
Campaign Name	Campagna Business Card	Campaign Owner	Admin Sic
Active	☒	Status	In Progress
Parent Campaign		Start Date	01/11/2025
Type	Other	End Date	31/12/2030
Campaign Currency	EUR - Euro		
Description			
Created By	Admin Sic, 18/11/2025, 11:44	Last Modified By	Admin Sic, 18/11/2025, 11:44

Activities can be carried out in a segmented and coordinated way by different user profiles, for example:

- reception staff can handle the entry of business cards,
- sales representatives can qualify visitors once they enter the booth,
- the marketing team can manage visitor conversion and their final assignment to sales representatives, ensuring a structured, end-to-end management of the entire contact lifecycle.

It is also possible to configure the visibility of visitors associated with campaigns as **public** or **private**, allowing information entered by each user to remain confidential or to be shared with all users who have access to the campaign.



Campaigns – Card Capture

The screenshot shows the 'Card Capture' interface for a campaign named 'Campagna Business Card'. The interface is divided into several sections:

- Header:** Includes a navigation bar with 'Card Capture', 'Campaigns', and a user profile 'OLIVIA WILSON / Contact'. There are buttons for 'Send Email', 'Edit', and 'Delete'.
- Campaign Details:** Shows the campaign name 'Campagna Business Card' with a status of 'In Progress', start date '01/11/2025', and end date '31/12/2030'.
- Details Section:** Contains tabs for 'Scans' and 'Leads & Contacts'. The 'Scans' tab is active, showing a 'Card Capture AI' section with a 'Select a photo or add manually' button and a 'LATEST CAPTURED CARDS (1)' section. Below this, there is a card for 'Full Name: Adriano Zucchi', 'Title: Partner e Bartender', 'Company: Tipoy Bar Catering', 'Email: info@tipoybarcateri...', 'Phone: +39 345 3234987', and 'Mobile P...'. There is also a 'Select or upload a business card to manage it' button.
- Activity Section:** Shows a list of activities with filters for 'All time', 'All activities', and 'All types'. It includes a 'Refresh' button and a 'View All' link. The activity list is currently empty, showing 'No activities to show. Get started by sending an email, scheduling a task, and more.' and 'No past activity. Past meetings and tasks marked as done show up here.'

Scans

Through this functionality, it is possible to operate according to the previously described modes, with the additional advantage that all entries made for a specific campaign are automatically associated with that campaign and are visible exclusively within it. They are not included in the private Card Capture AI repository, thus ensuring separate and consistent management of campaign data

Leads & Contacts & Person Account

It lists all visitors who have been converted, who initially remain associated with their originating campaign, ensuring traceability and continuity in the contact management process.

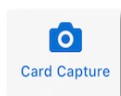
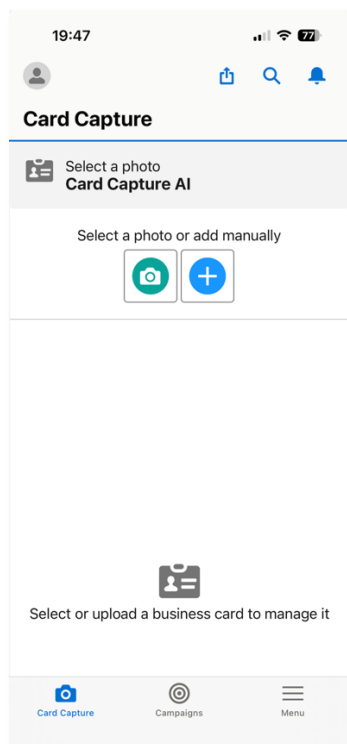


MOBILE MODE USAGE



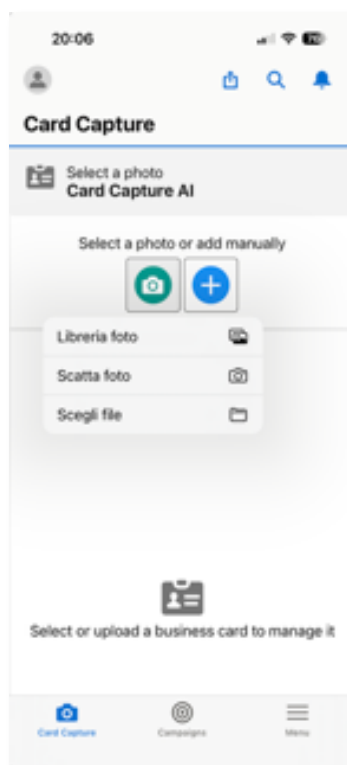


MOBILE – Card Capture



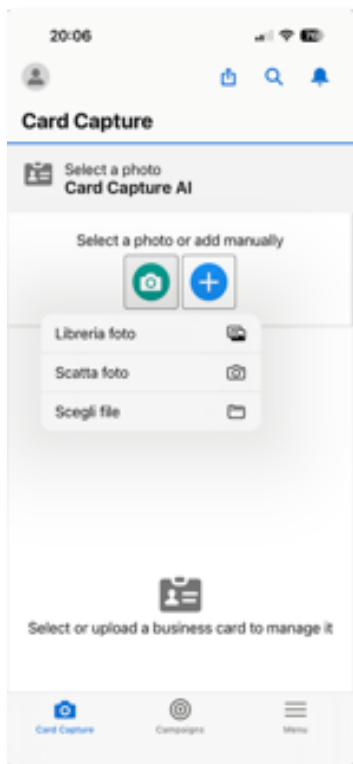
By selecting the **Card Capture** icon, users access the **private Card Capture AI** area, from which they can:

- Select a photo
- Manually add a card



By selecting the **Select a Photo** icon, it is possible to:

- Access the photo library on the mobile device
- Take a photo directly of the business card or badge
- Choose a file



By selecting **Photo Library** :

- You access the private photo library of the mobile device, from which a photo can be selected

By selecting **Take Photo** :

- You access the mobile device's camera, allowing you to take a photo

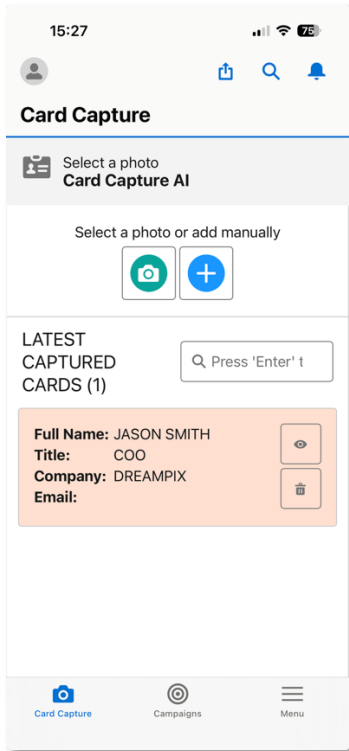
By selecting **Choose File** :

- You access the list of recent files on the mobile device, from which a file can be selected

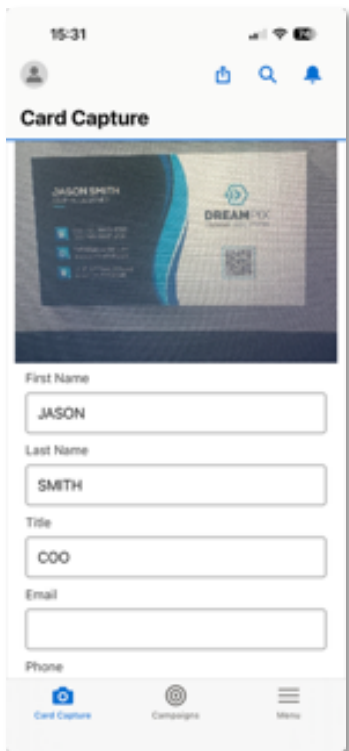


By selecting the Add Manually icon, it is possible to:

- Manually enter the information

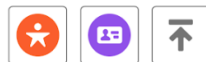


- The captured cards will be visible as a list in the **Private Card Capture AI** section



By selecting the **View** icon :

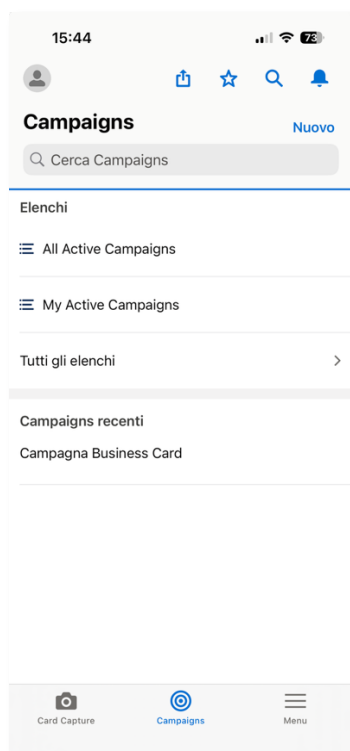
- It is possible to view the details of the selected Card Capture



- Create a Lead
- Create a Contact
- Create a Person Account (if enabled in the company org)
- Return to the top of the page

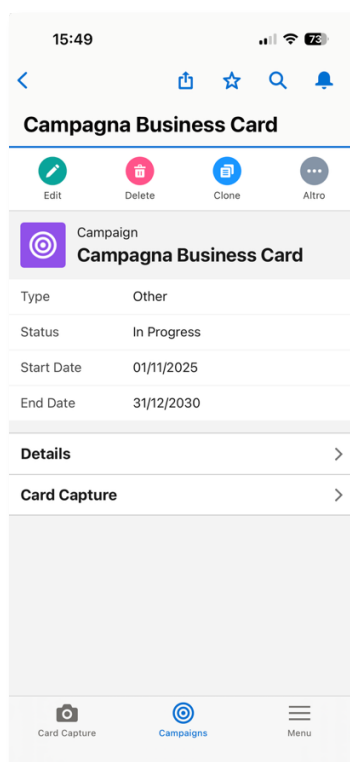


MOBILE – Campaigns



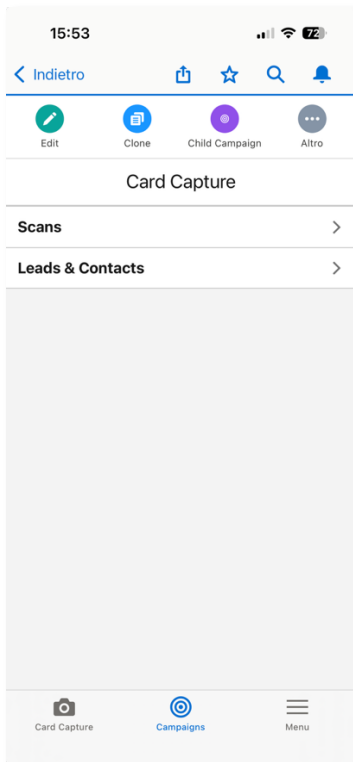
By selecting the Campaigns icon, users access the Card Capture AI – Campaigns area, from which they can:

- Select a specific campaign list
- View campaigns displayed in a list
- Select a specific campaign



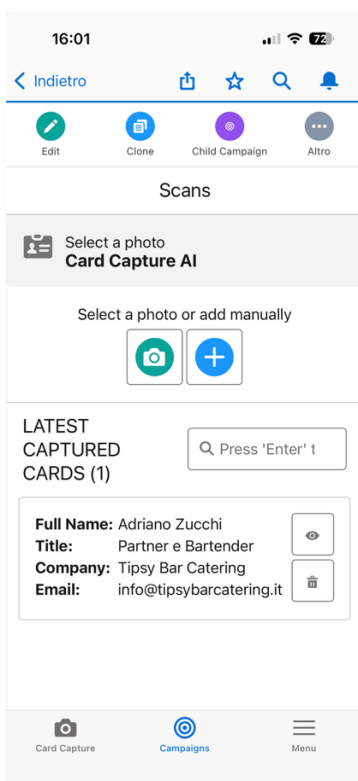
By selecting a specific campaign, it is possible to:

- View the campaign details
- View the list of objects related to the campaign
- Select Card Capture



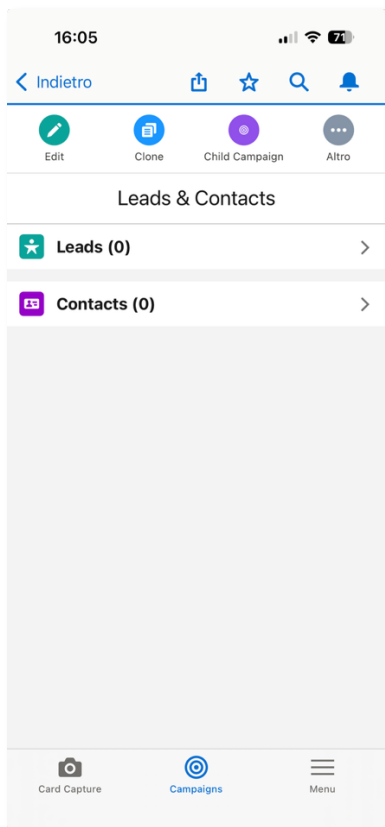
By selecting **Card Capture**, it is possible to make a further selection

- **Scan**
View Card Captures entered for the specific campaign
Add new Card Captures to the specific campaign
- **Lead & Contacts**
View Leads and Contacts created from Card Capture for the specific campaign



By selecting **Scan**, it is possible to:

- View Card Captures entered for the specific campaign
- Add new Card Captures to the specific campaign
- Create a Lead from a Card Capture
- Create a Contact from a Card Capture
- Create a Person Account from a Card Capture (if enabled in the company org)
- Return to the top of the page



By selecting **Leads & Contacts**, it is possible to:

- View the list of Leads created from Card Captures associated with the specific campaign
- View the list of Contact created from Card Captures associated with the specific campaign



Add-On

All the add-on modules and features described in this document are available through dedicated licenses, to be used in addition to the standard **Card Capture AI** product license.

It is possible to activate the entire add-on module package or select only the modules of interest, customizing the solution according to specific business needs.

Add-on Modules and Features:

- Mobile in modalità OFF LINE (add-on)
- Pardot e Marketing Cloud (add-on)
- Campaign Badge Scanner (add-on)



Support

The **SIC Development Team** supports customers throughout all phases of solution adoption, providing specialized assistance in product configuration to quickly maximize its benefits.

We are available to analyze specific requirements, evaluate functional extensions, and design tailored integrations with existing company systems.

Upon request, we also support the translation and localization of the application into additional languages, making the solution immediately ready for international use.

Our goal is to ensure a flexible, scalable experience that is perfectly aligned with the customer's needs.



Contacts e Links

- Insert link to **Contact Us**
- Insert link to **Card Capture Website Page**

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