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Xerox® Connect
App for
Salesforce®
Quick Start
Guide

Xerox® Connect App for Salesforce®

Xerox® Connect App for Salesforce® is for use with Xerox® ConnectKey® Technology enabled Multifunction Printers (MFP), VersaLink® and AltaLink® devices.

Xerox® Connect App for Salesforce® is an application that provides additional functionality to supported Xerox® Multifunction Printers (MFPs). Xerox® Connect App for Salesforce® is readily available to anyone with a Xerox® App Gallery account and can be installed directly from the Xerox® App Gallery app installed on supported MFPs.

Users can use the Xerox® Connect App for Salesforce® to scan in documents using the MFP and print important documents from a Salesforce® account.

Getting Started

STARTING

Once the Connect App for Salesforce® app is opened, the user will be directed to the Salesforce® Login Page. A user will log into the Salesforce® account using a username and password. Then click “Accept” to begin the Connect for Salesforce® App experience.

HOME PAGE

On the Connect for Salesforce® homepage, the user can choose to scan a document, and have it sent to a record in a Salesforce® account, or print a document saved in a Salesforce® account or a client account.

SCANNING

After selecting “Scan To” the user must now select a record in which the document will be saved.

First choose the record’s parent, which can be the Account name, Lead, or Contact.

Then type in the record’s name in the search field. Select the record and click “Ok”

On the Scan Page, the user can adjust any properties regarding the output of the document.

When finished, simply touch “Scan” and the document will be scanned and saved under the record selected.

PRINTING

After selecting “Print From”, now select a record in which the document currently resided.

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First choose the record's parent Account, Lead or Contact. Type in the record's name in the search field.

When selecting a record, the record's attachments will be displayed. Select the attachment to print.

On the Print Page, adjustments can be made to any properties regarding the output of the document.

When done, simply touch "Print" and the document will be printed.

Support

ONLINE HELP AND DOCUMENTATION

To access the Xerox® App Gallery knowledge base, click the link

<http://www.support.xerox.com/support/xerox-app-gallery/support>

To access the Xerox® App Gallery documentation, click the link

<http://www.support.xerox.com/support/xerox-app-gallery/documentation>

SUPPORTED DEVICES

For a list of supported Xerox® devices, click the link

<https://www.xerox.com/en-us/connectkey/apps>

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