

Scanner Plus™ for Microsoft Dynamics CRM



The easiest way to scan documents into CRM

www.clew-consulting.com

Email: sales@clew-consulting.com

Download at www.clew-consulting.com

Microsoft Dynamics CRM/Dynamics 365 is a powerful product supporting most aspects of customer interaction including phone calls, e-mail, word merges and meetings. But often customers or others send you documents. Scanning these and linking to appropriate records can be very labour intensive. Scanner Plus simplifies and streamlines this process

- Scan from most TWAIN compatible scanners
- Link to currently viewed recordⁱ, recently accessed record or use quick find
- Configurable scan parameters
- Assign categories to scans and automatically trigger workflows and actions, for example to notify CRM users
- Supports automatic document feeders and duplex scanning
- Works with CRM 2013, CRM 2015, CRM 2016 and Dynamics 365, both online and premise
- Scans, saves and links to CRM record with as few as 2 clicks from one screen
- Save in PDF, TIF, JPEG or BMP formats
- Scans can be stored as notes on records, notes on linked activities or in SharePoint documents, all configurable
- Crop and rotate images
- Central configuration of key settings. User configuration of other settings.

The screenshot shows the 'Scanner Plus for MSCRM' application window. It features a control panel on the left and a preview area on the right. Callouts point to various elements:

- Select scan type, resolution and page size:** Points to the 'Scan Type' (RGB Colour) and 'Dots per inch' (300) dropdowns.
- Select scanner from all those connected:** Points to the 'Scanner' dropdown menu (PaperStream IP SP-1120).
- Use scanner specific features such as document feeders, double sided scanning:** Points to the 'Use automatic feeder', 'Double sided', 'Multisheet', and 'Manual multisheet' checkboxes.
- Select type of record to which scan is to be linked:** Points to the 'Record Type' dropdown menu (Account).
- Single click to link to record currently displays in CRM:** Points to the 'Link to Current' button.
- Click to see recently accessed records to select record:** Points to the 'Link to Recent' button.
- Click to bring up quick search screen to select record:** Points to the 'Search and Link' button.
- Choice of file formats:** Points to the 'File Format' dropdown menu (PDF (Acrobat)).
- Category to simplify routing:** Points to the 'Category' dropdown menu.
- Preview of scan:** Points to the document preview area showing a 'Which?' magazine page.
- Custom margins/page size:** Points to the 'User Settings' section, specifically the 'Margins from top left' input fields.
- Rotation, cropping features. Can be saved for future scans:** Points to the 'Rotation, Cropping and Scan Area' section, including checkboxes for 'Apply crop to future scans' and 'Apply rotation to future scans'.



Scanner Plus™

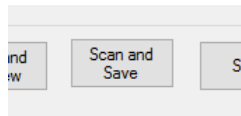
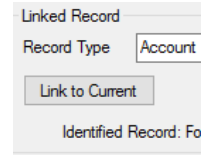
Details

The following pages give some insight into how Scanner Plus works.

Scanning in For End Users

Scanner Plus is designed to speed up the processing of incoming documents. Once set up scanning can take as few as two clicks but may be 4, 5 or sometimes more depending on the options selected.

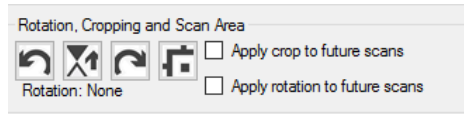
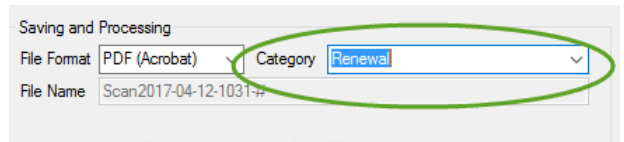
In the fastest route, you've already found the record in CRM. Then click on the Link to Current button which gets the current record information.



Then simply click on the Scan and Save button. It scans and saves to CRM. This not only files it but can also be configured to trigger a workflow.

Scanning may take a few more clicks. For example:

Scanner Plus is easily configured to allow a Category field to be used. The value is selected from the dropdown and stored in an activity record. The category can be used in workflows or other processes.



You may also want to rotate or crop the scans, for example if you only need to scan part of an incoming document. But if you are scanning many such documents, just tick the boxes to save these for future scans.

It only takes a few minutes to train a user to start using Scanner Plus.

Configuration

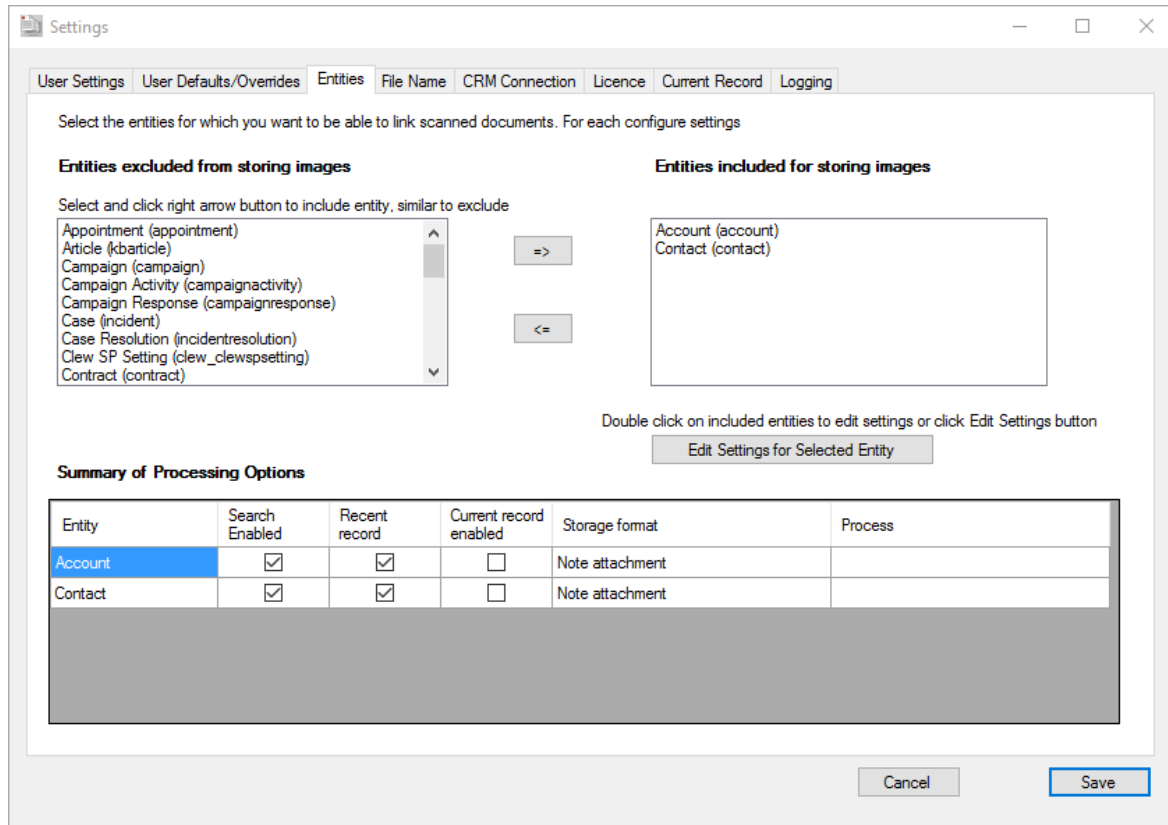
Scanner Plus has a comprehensive set of configuration dialogs accessed via the Settings button. Except for CRM and sometimes SharePoint connection data (if SharePoint is used), all configuration settings are stored in CRM. Most of the configuration is only able to be changed by a CRM system administrator or users with a special role "Clew Scanner Plus Administrator". Some settings and scanner settings can be edited by individual users and are separate for each user.

On first installation Scanner Plus sets up sensible defaults for a system, so you can be up and running in minutes. But it also has some more sophisticated options which can help you get the most out of it. Even these take typically less than 30 minutes to set up.



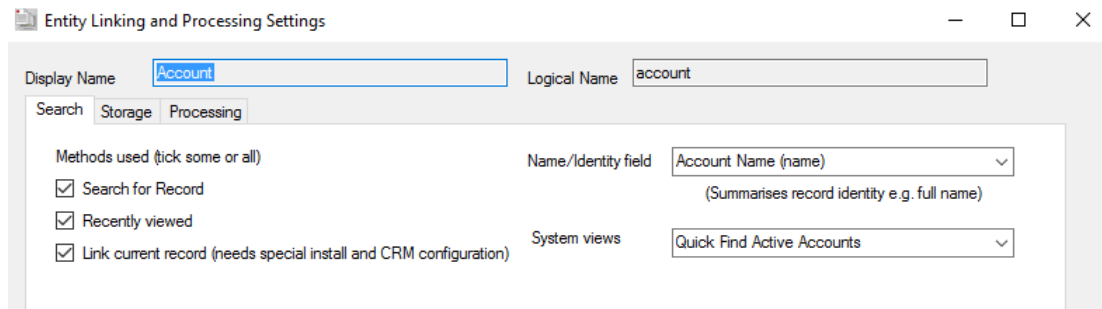
Scanner Plus™

The main Settings dialogs are shown below:



The Entities tab shown is the most important. It allows the administrator to configure which types of CRM entity can be used with Scanner Plus. In the above screen only Account and Contact records are selected but any entity which either supports attachments or documents, or allows activities to be attached which, in turn, can also have attachments, can be added to the list. In most applications only a few entities will be enabled for use by Scanner Plus.

Selecting one of the entities and click on Edit Settings allows configuration of processing settings for that entity.



The first tab shown above allows the types of search methods to be selected. It also identifies which CRM views are utilised for searches.



Scanner Plus™

The second tab configures how the scans for that entity are stored:

Scanner Plus allows scans to be stored against the entity itself or against an activity which is created and linked to that entity. In the above example it is set to store against the main record but to create an activity as well. The activity can also be set to have a category field, allowing for automatic routing or similar purposes. All designed to streamline incoming document handling!

The third entity processing tab allows workflows to be configured:

Here a workflow has been configured to run on the main record. This is typically used to notify users but it might be much more sophisticated. Workflows can also be set to be attached to an activity created if the Storage tab is configured to create one.



Scanner Plus™

Another useful configuration setting is the File Name tab. This allows the name of the document to be configured. This can use part or all of the date and time. It can also add a counter (autonumber) value which is unique across all scans. Users have the ability to edit file names but this can be disabled here.

File Name

Prefix Example: Scan2017-06-01-1135-000000000000

Use Year
 Use Month
 Use Day
 Use Time

Use Counter Prevent user from editing file name

Save Confirmation

Prompt for confirmation before saving

The User Defaults/Overrides tab allows some values which are normally above to be changed by an end user to be fixed centrally. This includes the default file format, the type of scan (e.g. black and white, grey scale, colour) and the resolution.

Settings

User Settings | **User Defaults/Overrides** | Entities | File Name | CRM Connection | Licence | Current Record | Logging

The settings in this tab can only be changed by users with Scanner Plus administrator role

Default file format Prevent users from changing file formats

Default pixel type Prevent users from changing pixel type

Default resolution (DPI) Prevent users from changing resolution

Note that if the scanner does not support this resolution the nearest appropriate setting will be used

Other tabs allow logging to be configured and the product licence to be added or changed.

The CRM connection is set up in a separate dialog for each user, as normally you want users to login using their own identification, but it can also be changed in the CRM Connection tab.



Common Questions

Which entities does Scanner Plus link image to? The list of entities a scan can be linked to is configurable by an administrator. Also for each entity it can be configured to store the image as an uploaded Notes file, as notes attached to an activity attached to the entity or as a file in a SharePoint folder. In the latter case the folder is automatically created if it does not exist.

How many scanners can I use on a system? As many as you like. Scanner Plus is licensed based on two values: the number of users who are permitted to run Scanner Plus and scan images and the total number of users in the system. This takes account of the fact that in many environments an incoming mail department reads letters and scans them, notifying other users.

What is the installation and configuration procedure? This is straightforward:

- Install the application on a workstation, preferably one with a scanner.
- Import a simple CRM solution into CRM. This adds two small entities, two security roles and a single JavaScript web resource which can be used optionally to notify Scanner Plus of the current record – see below. Add all users who use a scanner to one of the security roles as only these are permitted to run scans.
- Run Scanner Plus, configure the connection to CRM. A sensible default installation is automatically set up and you can test it immediately. If you have purchased a licence you can add it as part of configuration – otherwise it just runs in evaluation mode.
- Optionally if you want to use the Clew Current Record service which allows Scanner Plus to determine which record the user has last used, you need to add the JavaScript to run on entity forms which will be used for scanned images – for example the Account and Contact ones.

This should take no longer than 30 minutes.

Which versions of Dynamics CRM are compatible with Scanner Plus? Scanner Plus works with CRM 2013, CRM 2015, CRM 2016 and Dynamics 365, both premise and online versions.

Which scanners does it work with. Scanner Plus uses the TWAIN interface so should work with most scanners. However sadly some Scanners have quirks which may cause issues. Scanner Plus has a few settings which can help avoid these but it is recommended that you run tests with you scanners. A special test program and installer is available on the web site - just download, install and run. It doesn't connect to CRM but lets you test the TWAIN interface.

Will Scanner Plus work with network based scanners? Unfortunately many do not support TWAIN but some have TWAIN emulators which run on a workstation and make it appear that the scanner is local. These generally work but test it first!

How can I evaluate Scanner Plus? Download and install a copy from the Clew Consulting website at www.clew-consulting.com. This is fully functional but adds a large block and notice to each scanned image. Buy a licence and the unlock code removes this. All your settings are preserved when you convert the evaluation to live version. The evaluation does not include access to the current record service, but a test licence for this can be issued on request.

Can I have a copy of Scanner Plus for development and test? If you purchase a licence we will also provide a free development copy licence on request. Or you can just run it in evaluation mode with your test systems.

Will Scanner Plus run on synchronised remote copies? No. This would cause various issues so is not supported.

Will Scanner Plus deal with non-English versions of CRM? Yes, but at the moment the user interface is in English only. We expect to add other languages in future.



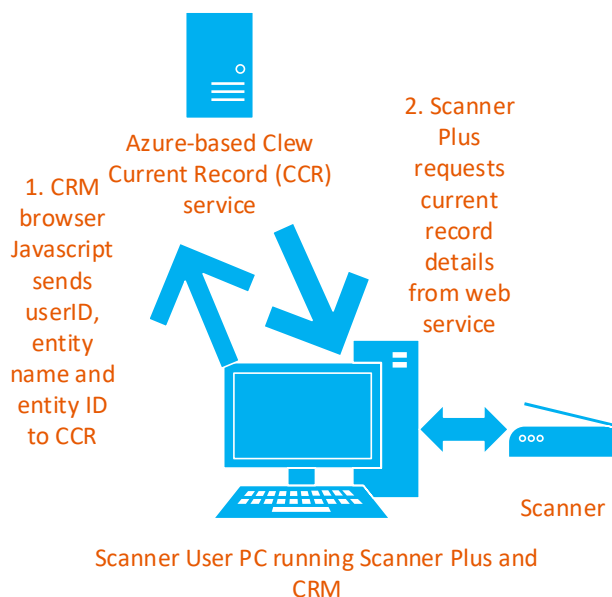
Scanner Plus™

Can I evaluate Scanner Plus but on a PC without a scanner? See the Scanner Plus download page where there is a link to a download from the Twain Working group which creates a virtual Twain scanner.

How do I get support and new versions of Scanner Plus? The initial licence purchase includes one year of e-mail support, with follow up phone and remote support if required. This also includes new releases. In subsequent years a maintenance fee is payable to maintain this same level of support. Support is also needed for the current record service which includes an Azure service provided by Clew.

Does scanner plus support batch scanning? For example a department might receive hundreds of letters and want to scan them in one operation. Not at the moment but this might be added as an option in the future, linked to automatic allocation to records, for example using bar codes or OCR

How does Scanner Plus determine the current record being viewed by a user? Dynamics CRM essentially runs in a browser. For security reasons browsers are prevented from communicating with the local machine. Scanner Plus uses the Clew Current Record service which was developed for Scanner Plus by Clew. The diagram below illustrates this.



The concept is straightforward – a small JavaScript program is configured in CRM to run when a record form is opened. It sends minimal identity information to an Azure web service provided by Clew Consulting. When Scanner Plus needs to determine the current record it requests it and gets the ID of the most recent record of that type seen by that user. Records are unique to the Scanner Plus installation (using a licence key), plus the user as well as the entity type). No personally identifiable data is passed to the web service. The web service only maintains records for about 30 minutes as after this the record is deemed to be no longer current. Older records are deleted, normally every hour.

The Clew Current Record service needs a licence key which is included in the initial purchase and renewed each year along with Scanner Plus support.

System Requirements

Scanner Plus is a 32 bit program which runs on 32 bit or 64 bit windows. It has been developed and tested mostly on Windows 10 but should work on older versions of Windows. Operation has been verified on Windows 8.

It does need .net 4.7.2 due to the need to use TLS 1.2 when connecting to CRM online – this is easily installed if it is not already on your PCs.



Scanner Plus™

Licensing and Pricing

Licenses are keyed to either the server name or the CRM organisation name depending on the type of installation. For *premise* systems (i.e. installed on your own server) they are keyed to the server name and will work on any and all organisations on that server. For *online* systems hosted by Microsoft they are keyed to the CRM organisation name. The online order form helps you provide the appropriate information.

If you change your server name or organisation name, just e-mail support@clew-consulting.com and subject to verification we'll issue a replacement licence at no cost.

Licenses are also according to the number of users of various types of the CRM organisation as described below.

Primary User Licensing Model

The main user licensing model for Scanner Plus reflects the fact that in most systems we'd expect a relatively small number of users to actually do scanning but a larger number or all users to make use of the resulting scans in CRM. The pricing reflects this.

In this model Scanner Plus is licensed according to two parameters:

- The total number of enabled read/write (full) users in CRM (N), including scanning users
- The number of users who will actually scan documents (S)

The table below shows the prices in the three currencies offered. Also note the maximum price ceiling which will be the most charged. If your site reaches this level a licence for an unlimited number of users will be issued. Please note VAT will be added in the UK.

	Read/write per user price (N)	Scanning user additional price (S)	Ceiling price
US dollars (\$)	\$25	\$125	\$6250
Euros (€)	€24	€120	€6000
Pound sterling (£)	£20	£100	£5000

Some examples of typical configurations are shown below.

Total number of read/write users (N)	Number of scanning users (S)	Price \$	Price €	Price £	Notes
10	1	\$375	€ 360	£300	
10	2	\$500	€ 480	£400	
10	10	\$1,500	€ 1,440	£1,200	See below – flat price cheaper
50	5	\$1,875	€ 1,800	£1,500	
100	10	\$3,750	€ 3,600	£3,000	
1000	25	\$6,250	€ 6,000	£5,000	Ceiling price
1000	100	\$6,250	€ 6,000	£5,000	Ceiling price



Scanner Plus™

Note that if you expect to increase the number of users of CRM it is suggested you purchase more licences than needed. Otherwise Scanner Plus will cease to work (or in fact switch to evaluation mode). Scanner Plus checks the total number of users when run as well as checking that individual users are licensed for scanning.

If you increase the number of total users or scanning users you simply order a new licence and pay the difference between the current price of your licence and the new price. For example using the above table, a site going from 50 total users, 5 scanner users to 100 total users, 10 scanner users would pay \$1875.

Payment is required prior to supply of licences and is normally by PayPal invoice charged in one of the above three currencies. You can also pay by bank transfer for payments of more than \$600/ €600/£500 – please ask for details.

Reseller terms are available to approved resellers, normally Microsoft Partners. Please e-mail info@clew-consulting.com giving details of your web site and confirming you are a Microsoft CRM Partner.

Flat Users Pricing Model

Some sites will have all or most users carrying out scanning. In such cases a simpler price model is available based solely on the total number of read/write users.

	Read/write per user price (N)
US dollars (\$)	\$37.50
Euros (€)	€36
Pound sterling (£)	£30

The same ceiling price applies. So a 10 user system where all users can scan is \$375. Choose whichever is cheapest.

The Clew Consulting web site has a simple price calculator at www.clew-consulting.com/scanner-plus-for-crm-price-calculator which allows you to enter the user counts and gives you the cheapest price..

Support

The initial licence purchase includes one year of e-mail support, with follow up phone and remote support if required. This also includes new releases, in particular to work with newer versions of CRM though we also expect enhancements to functionality to be included. In subsequent years support is currently charged at the rate of 15% of the current licence price per year, payable in advance.

Support also includes subscription to the Clew Current Record service which can optionally be used to simplify location of a record against which to file a scan.

Please note that support covers the core product only. With the huge number of different scanners in use and the fact that many have suspect TWAIN interfaces, we cannot undertake blanket coverage of this. We will however try to respond to issues with particular scanners if possible. We always suggest you run the Scanner Plus test program with your scanner before purchasing. If you like you can then install the full evaluation version which is full functional. Purchasing a licence unlocks this.

We are also considering some significant developments to Scanner Plus. Some may be included in the core product and available as part of support. Others may be bolt-on options which would not be included – for example OCR.

Evaluation

You can download a free evaluation copy of Scanner Plus at www.clew-consulting.com. This will work on any CRM system with any number of users and is fully functional except that it writes a block to the centre of each image. It can be converted to a full version by simply purchasing an unlock code – the evaluation and full version software are



Scanner Plus™

the same. This is important as it allows you to check that the scanners you will be using are compatible and have suitable TWAIN drivers.

The evaluation version does not support the Current Record Service. If you specially want to evaluate this please use the order form but specify an Extended Evaluation. WE'll issue a free limited time licence key for this.

Ordering

The Clew web site includes an order form. Complete this and send. We will send a PayPal invoice and on payment will issue your full licences. You may also be able to order from your CRM partner.

Scanner Plus is a trademark of Clew Consulting Limited. Other products and brands are registered trademarks or trademarks of their respective owners/companies.

ⁱ Requires small JavaScript addition to CRM form(s) and subscription to Clew Current Record Service which is included in Scanner Plus Licence/Support