

Licensing

This feature is available in the United Interface only and is for the Dynamics 365 Sales Enterprise version and not the Sales Professional. This function provides for 10 scans per user per month (pooled at tenant level). Additional capacity is available with Sales Insights giving 200 scans per user per month.

Scanning Business Cards – User Guide

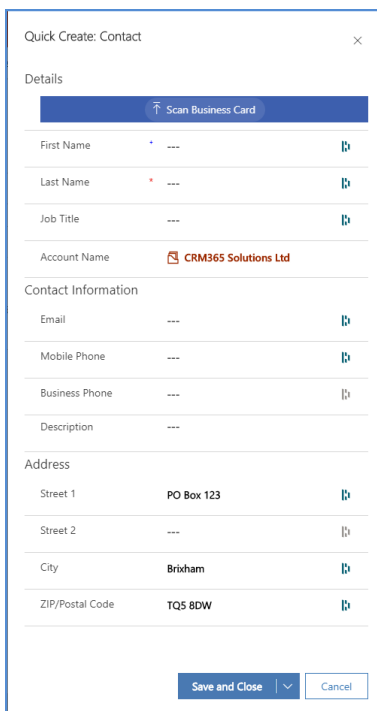
Desktop App

On the Quick Create form there is an option to Scan Business Card. If you're using the Dynamics 365 Sales app on a desktop, browse to the folder where the business card picture is stored, select the business card picture, and then select Open.

If you are adding a Contact to an existing Account within D365 best practice is to add the contact from the Account record. This will then complete some of the fields automatically (depending on the configuration of your implementation).

The details such as first name, last name, account name, job title, and email will be automatically populated from the business card.

Review and amend any of the details if required and then select **[Save & Close]**.



Quick Create: Contact

Details

Scan Business Card

First Name: ---

Last Name: ---

Job Title: ---

Account Name: CRM365 Solutions Ltd

Contact Information

Email: ---

Mobile Phone: ---

Business Phone: ---

Description: ---

Address

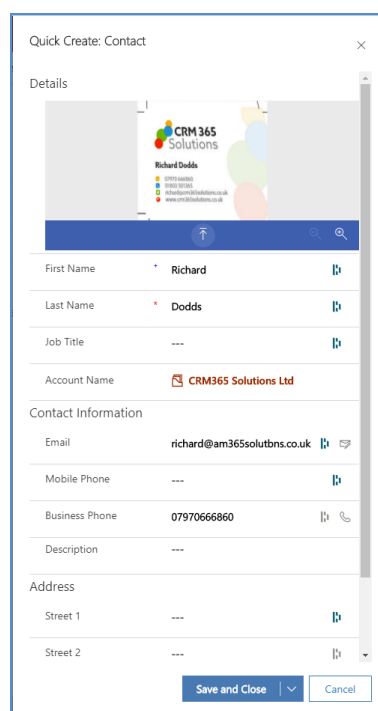
Street 1: PO Box 123

Street 2: ---

City: Brixham

ZIP/Postal Code: TQ5 8DW

Save and Close | Cancel



Quick Create: Contact

Details

Scan Business Card

First Name: Richard

Last Name: Dodds

Job Title: ---

Account Name: CRM365 Solutions Ltd

Contact Information

Email: richard@am365solutbns.co.uk

Mobile Phone: ---

Business Phone: 07970666860

Description: ---

Address

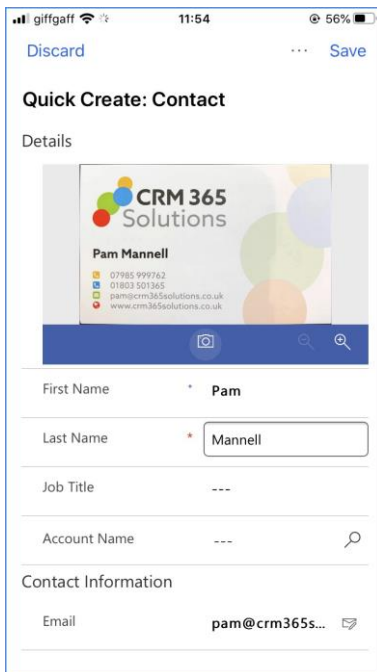
Street 1: ---

Street 2: ---

Save and Close | Cancel

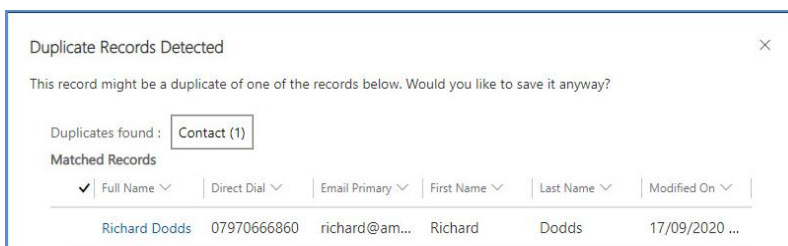
Mobile App

If you are using a mobile phone, use the mobile phone camera to capture the business card picture. The process is then the same as for the desktop app.



Duplicate Detection

When you save the Contact or Lead record, a Duplicate Records detected dialog box is shown if duplicate records are found based on the available duplicate detection rules. You can choose whether you want to create a duplicate record or not.



Store Business Card Image

When you save the Contact or Lead record, the business card is also associated and stored in the record, so you can refer to it later.

If your system administrator has set the Always retain business card images after scanning option to No, the business card image won't be saved.