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# Barcode To Cloud

This app allows you to scan barcodes/QR codes and execute actions in Salesforce using the scanned barcode value. It is available in iOS and Android.

## Configuring the app

Configuration of the “*Barcode To Cloud*” mobile app has two steps.

1. Connecting to Salesforce
2. Configuring Scanner

When you open the app for the first time, you will see below options

## Welcome to Barcode To Cloud

Please complete below steps under settings to start scanning.

Connect to a Salesforce

---

Configure Scanner

---

## Connecting to Salesforce

Select “Connect to Salesforce” option. When you click the “Connect to Salesforce” button, it will navigate you to a screen where you can enter your Salesforce credentials.

Edit Connection

CANCEL

Environment\*

Production/Developer

Username\*

demo@sfwizard.com

Password\*

••••••••

Security Token

SAVE CONNECTION


Enter your Salesforce credentials and choose the correct environment type. Please note that if your IP address range is whitelisted in your Salesforce user profile, you don't need to enter a security token. But if your IP address is not whitelisted, you definitely need to enter your security token. [How to reset your security token if you forgot?](#)

Click "Save Connection". If the credentials you entered are correct, the app will be able to connect to Salesforce and save connection details. If there is any issue with the login credentials, an error message will be displayed in the UI.



Once connection is established successfully, you will see the connection details in the app like below,

## Settings

### Connection Details



demo user  
NA  
Username: demo@sfwizard.com  
Email: albertsfo1@gmail.com

 EDIT  DELETE

### Scanner Configurations

CONFIGURE SCANNER

OR

IMPORT CONFIGURATION

### Subscription Status

GET UNLIMITED SCANS



Scanner



Settings

## Configure Scanner

You can either configure the scanner through a step by step wizard or import the configuration someone shares from the app. Please note that this configuration is very flexible and you can achieve almost any business requirement with the step by step configuration.

## Import Configuration

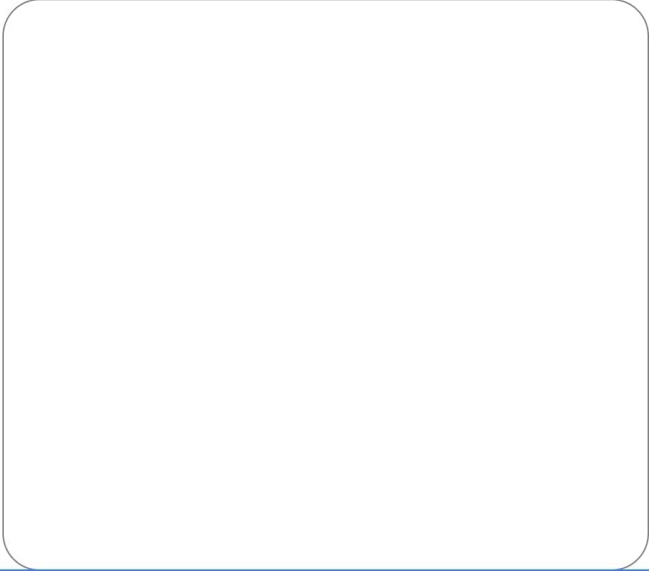
If someone else has created the configuration you need, you can just ask them to share the configuration to you. For example, using below configuration, you can create a chatter post when barcodes are scanned,

```
{"operation":"create","object":"FeedItem","barcodeField":"","onSuccess":"","onError":"","maxHistory":30,"torchOn":false,"showTorchButton":true,"preferFrontCamera":false,"showFlipCameraButton":true,"continuousScan":false,"mapping":[{"field":"Body","value":"BARCODE","fixedText":"","type":"textarea","options":[],"updateable":true,"createable":true}, {"field":"ParentId","value":"USERID","fixedText":"","type":"reference","options":[],"referenceTo":"Account","updateable":false,"createable":true}]}
```

To use the configuration, if you have any scanner configurations, delete it first. Then click on "Import Configuration" button. It will open a window where you can paste above configuration.

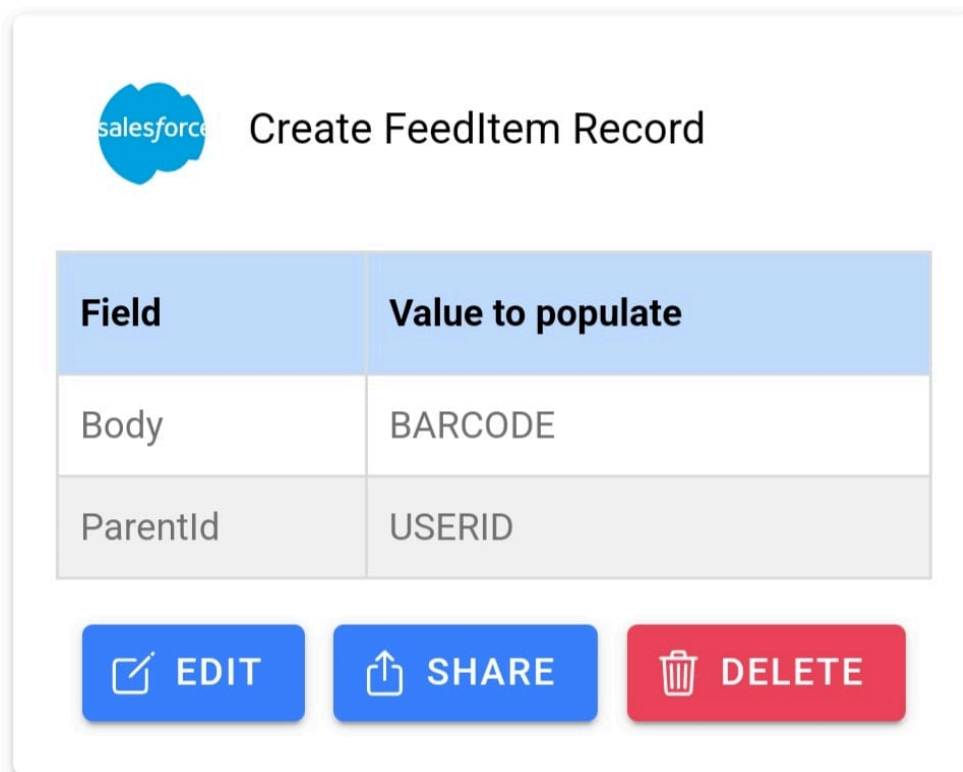
**Import Configuration** CANCEL

Please paste your configuration JSON here



**IMPORT CONFIGURATION**

Make sure that you are pasting full configuration JSON. Then click on the “Import Configuration” button. This will save the configuration directly and will look like below,



The image shows a Salesforce interface for creating a FeedItem record. It features a table with two columns: 'Field' and 'Value to populate'. The table contains two rows: 'Body' with the value 'BARCODE' and 'ParentId' with the value 'USERID'. Below the table are three action buttons: 'EDIT' (blue), 'SHARE' (blue), and 'DELETE' (red).

Field	Value to populate
Body	BARCODE
ParentId	USERID

**EDIT** **SHARE** **DELETE**

## Manual Configuration

Configuring the scanner through the step by step wizard is a 4 step process. For example, we will go through the configuration to lookup an account record by barcode and update some fields in the matching record. We are assuming that we have barcodes matching account numbers in the record.

Step 1 => Select "Update a record in Salesforce"

Scanner Configuration

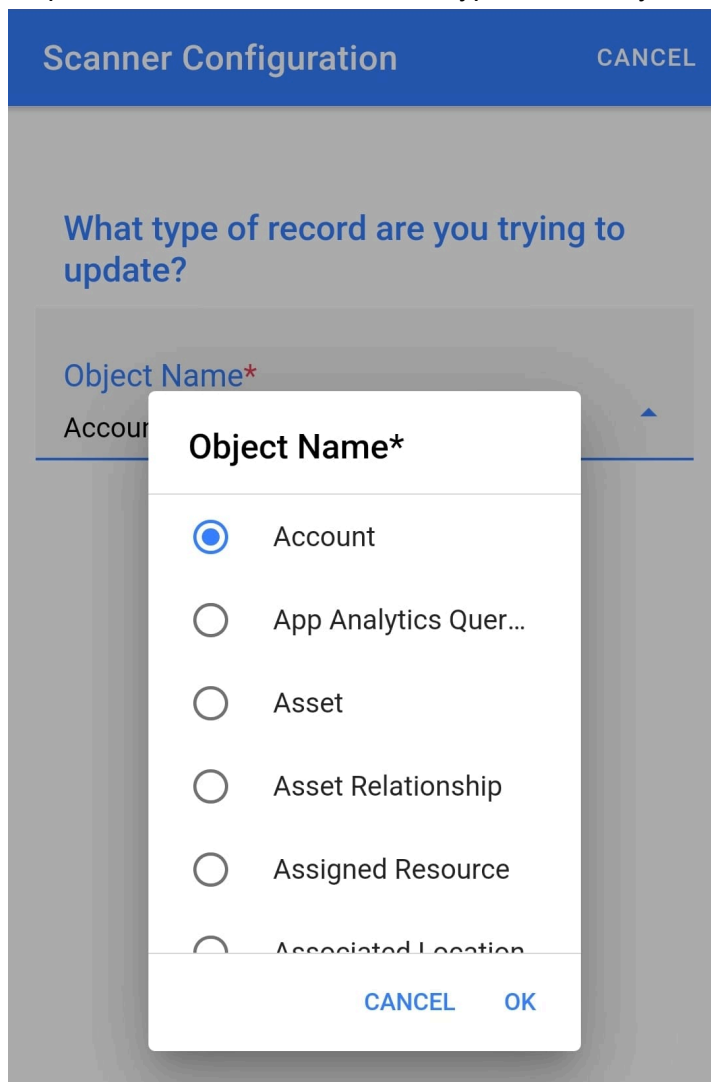
CANCEL

### What should happen when barcode is scanned?

- Create a record in Salesforce
- Display a record from Salesforce
- Update a record in Salesforce
- Delete a record in Salesforce

NEXT >

Step 2 => Select "Account" as the type of record you want to update





Step 3 => Select "Account Number" as the field that you want to match and select a number of fields that you want to update

**Scanner Configuration** CANCEL

Specify what field can be used to find a matching "Account" record from the scanned barcode value?

Account Number ▼

Specify the values that needs to be populated in Account record?

Field Name	Dynamic Value	
Account Name <span>▼</span>	USER INPUT <span>▼</span>	
Account Phone <span>▼</span>	USER INPUT <span>▼</span>	
Account Rating <span>▼</span>	FIXED VALUE <span>▼</span>	Hot
Parent Account ID <span>▼</span>	USER INPUT <span>▼</span>	

− REMOVE ROW + ADD ROW

⏪ PREVIOUS NEXT ⏩

Step 4 => Leave default options in the last screen and click “Save Configuration”

Scanner Configuration CANCEL

Maximum number of scans to show in history.\*  
30

---

Turn on flash always

---

Show flash toggle option

---

Use front camera if available

---

Show option to switch camera

---

Scan continuously


---

← PREVIOUS SAVE CONFIGURATION



Once the configuration is saved, you will be able to view the config like below and share it with other mobile app users

## Settings


### Connection Details



**demo user**  
NA  
Username: demo@sfwizard.com  
Email: albertsfo1@gmail.com




 EDIT  DELETE

### Scanner Configurations



**Update Account Record**  
using "AccountNumber" = BARCODE

Field	Value to update
Name	USER INPUT
Phone	USER INPUT
Rating	FIXED VALUE(Hot)
ParentId	USER INPUT

 EDIT  SHARE  DELETE

  
Scanner

  
Settings

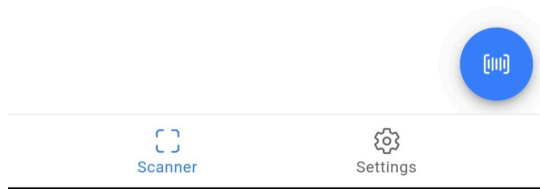
## Scanning Barcodes/QR Codes

Once you have done the configuration, you can scan barcodes and update actions in Salesforce. You can do this by going to the "Scanner" Tab and clicking the scan icon at the bottom right.

Barcode To Cloud

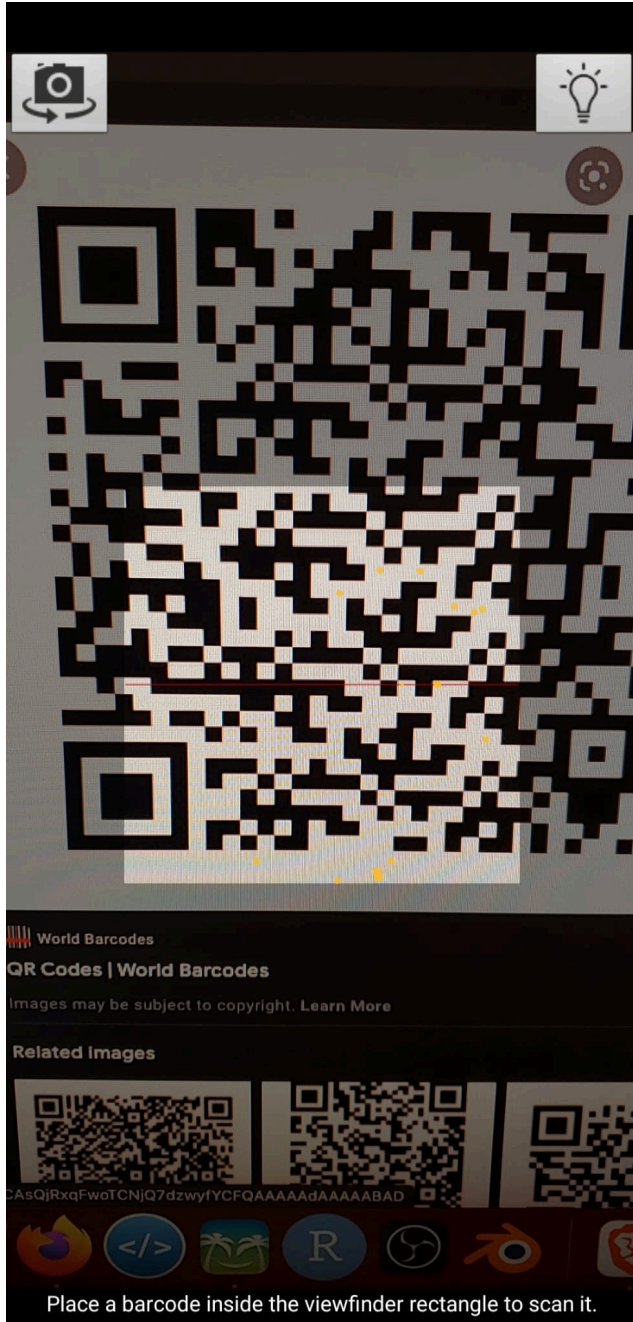
Please click Scanner icon to start scanning

GET UNLIMITED SCANS



## Scan Process

When you click the scanner icon for the first time, it will ask you for permission to access the camera. You can give this permission, so that the app can scan barcodes using the mobile camera. Then you can point the camera to any barcode/QR code.



Scanning camera interface will look like above. Make sure that the QR code is positioned inside the box in the center of the camera (not like the screenshot above :)).

## Barcode Details Edit

BACK



Barcode: I love you

Type: QR\_CODE

Scan Time: 03/15/2022 11:21:35 PM

### Salesforce Operation

Operation: update

Object: Account

Status: pending

Id:

Field Name	Value
Name	new test
Phone	5436454645
Rating	Hot
ParentId	0015Y000039A7nPQAS

BACK

SAVE



Scanner




Settings

Once you have scanned a barcode, if there are "USER INPUT"s in your scanner configuration, it will take the user to a record edit page like above. Here users will have the ability to enter data in any of the fields that is configured in the scanner configuration before saving the data to Salesforce. The app will display the correct type of input option based on the type of field in Salesforce.

When user clicks "Save", the data gets saved to Salesforce and users will be taken to confirmation screen


### Barcode Details

BACK




Barcode: I love you  
Type: QR\_CODE  
Scan Time: 03/15/2022 11:21:35 PM


#### Salesforce Operation

Operation: update  
Object: Account  
Status: success   
Id: 0015Y000039ABofQAG

Field Name	Value
Rating	Hot
Name	new test
Phone	5436454645
ParentId	0015Y000039A7nPQAS

BACK EDIT

  
Scanner

  
Settings

## Status Indicators

Green checkmark indicates that the operation was successful and data is saved to Salesforce. A red color icon will indicate that there was an error while saving the data. And the blue color status indicator shows that the data is yet to be saved to Salesforce.



Users can see recent scans in the home “Scanner” tab.



## Miscellaneous


### Unlimited Scans/Premium Subscription

There is a limit on the number of scans every month on the free version of the app. You can upgrade to the paid version to get an unlimited number of scans. There are manually and annual subscription plans

© Mar 15


Unlimited Subscription Close

There is a 10 scans/month limit in free version

 Barcode To Cloud

**Monthly**  
Unlimited Scans. Cancel Anytime  
**\$4.99** monthly

**Annual**  
Unlimited Scans. Cancel Anytime  
**\$49.99** annually

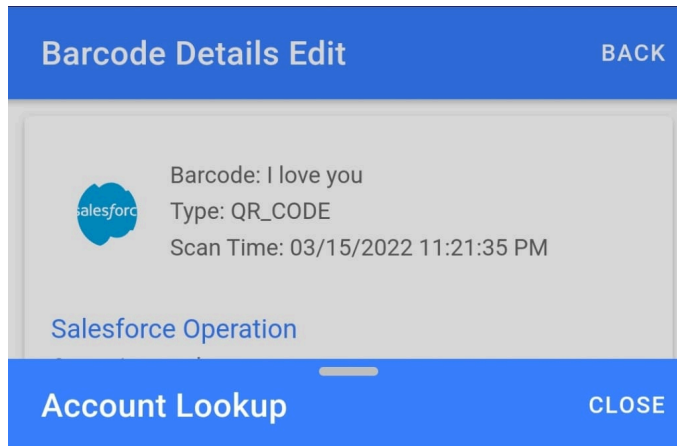
 Continue

As a solo developer of this ad-free app, I would ❤️ your support to pay for my costs 🙏

This subscription purchase will be applied to your iTunes account. Subscriptions will automatically renew unless canceled within 24-hours before the end of the current period. You can cancel anytime within your iTunes account settings.

## Support for Different Field Types

The app will show the correct type of inputs based on the type of field configured in Salesforce. For example date selector for date type fields, dropdown selector for picklist type fields and a lookup screen like below for lookup fields,



Select Account record after searching

### Tesr Account

0015Y000039A7nPQAS

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<https://qrco.de/bcH2zo>

0015Y000039A3rcQAC

---

<https://www.kaspersky.com>

0015Y000039A3rXQAS

---

[https://en.wiktionary.org/wiki/QR\\_code](https://en.wiktionary.org/wiki/QR_code)

0015Y000039A3rDQAS

---

<https://www.surveyking.com/w/zx7i91j>

0015Y000039A3r3QAC

---

Hello :)

0015Y000039A3qyQAC

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## Support

I understand that the app is complex and might need some configuration work to support your business use case. Please join my Slack chat workspace below to get any support for or help with the application.

[Join Slack to Chat](#)

OR

You can email me at **albertsfo1@gmail.com**