



Solutions for information workers



Dynamics CRM Scanner and OCR Plug-in

Administrator and User Guide

Version:

Plug-in for CRM 2013: 3.2.x

Plug-in for CRM 2015: 3.6.x



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Overview

Websio Dynamics CRM Scanner and OCR Plug-in adds extra power to the native CRM capabilities. Now you can scan and/or compose searchable PDF documents and save them as attachments or as documents.

With easy-to-use interface of the Plug-in your employees will be able to scan or compose documents right away allowing you to save on training your staff.

The Plug-in is realized as native Dynamics CRM managed solution.

The Plug-in supports:

1. OCR allows to convert image to text (more than 50 languages) *
2. Properties recognition - Zonal OCR
3. Barcode recognition
4. Scanning multiple documents in a single batch using document separator sheets or barcode separation
5. Saving pages as:
 - Single document
 - Document per page
 - Multiple documents using document separator sheets
6. Document composing from the existing image or PDF files
7. Regular and Quick Scan modes
8. PDF, TIFF, JPEG, PNG, BMP and GIF output formats.
9. Advanced compression technologies, enabling best document quality with smallest file size
10. All types of Windows-compatible scanners: simple desktop and professional scanners with feeders, local-connected (USB) and network-connected (IP) scanners.
11. All major browsers (Internet Explorer, Edge, Chrome, Firefox).
12. Multilingual user interface (English, Arabic, Czech, German, Hebrew, Russian)



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* Supported OCR languages:

English, Afrikaans, Albanian, Arabic, Azerbaijani, Basque, Belarusian, Bengali, Bulgarian, Catalan, Cherokee, Chinese Simplified, Chinese Traditional, Croatian, Czech, Danish, Dutch, Esperanto, Estonian, Finnish, Frankish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Icelandic, Indonesian, Italian, Japanese, Kannada, Korean, Latvian, Lithuanian, Macedonian, Malay, Malayalam, Maltese, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian, Slovakian, Slovenian, Spanish, Swahili, Swedish, Tagalog, Tamil, Telugu, Thai, Turkish, Ukrainian, Vietnamese

The Plug-in allows saving scanned or composed documents as:

1. Attachment

The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'Demo Account'. Below the navigation bar, there are buttons for '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', and 'ASSIGN'. The main content area shows the 'Demo Account' details under the 'ACCOUNT' tab. The 'Summary' section includes 'ACCOUNT INFORMATION' with fields for Account Name, Phone, Fax, Website, Parent Account, and Ticker Symbol. A context menu is open over the 'Demo Account' card, listing various actions: 'Email a Link', 'Delete', 'Form', 'Share', 'Follow', 'Run Workflow', 'Start Dialog', 'Run Report', 'Scan Note', 'Quick Scan', and 'Regular Scan'. The 'Scan Note' option is highlighted, and a red box is drawn around it and the 'Quick Scan' and 'Regular Scan' options.



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2. Document

Microsoft Dynamics CRM | SALES | Accounts | Demo Account | Create

ACCOUNT
Demo Account

Annual Revenue
--

Document Locations: Documents on Default Site 1

+ ADD LOCATION | EDIT LOCATION | SCAN DOCUMENT |

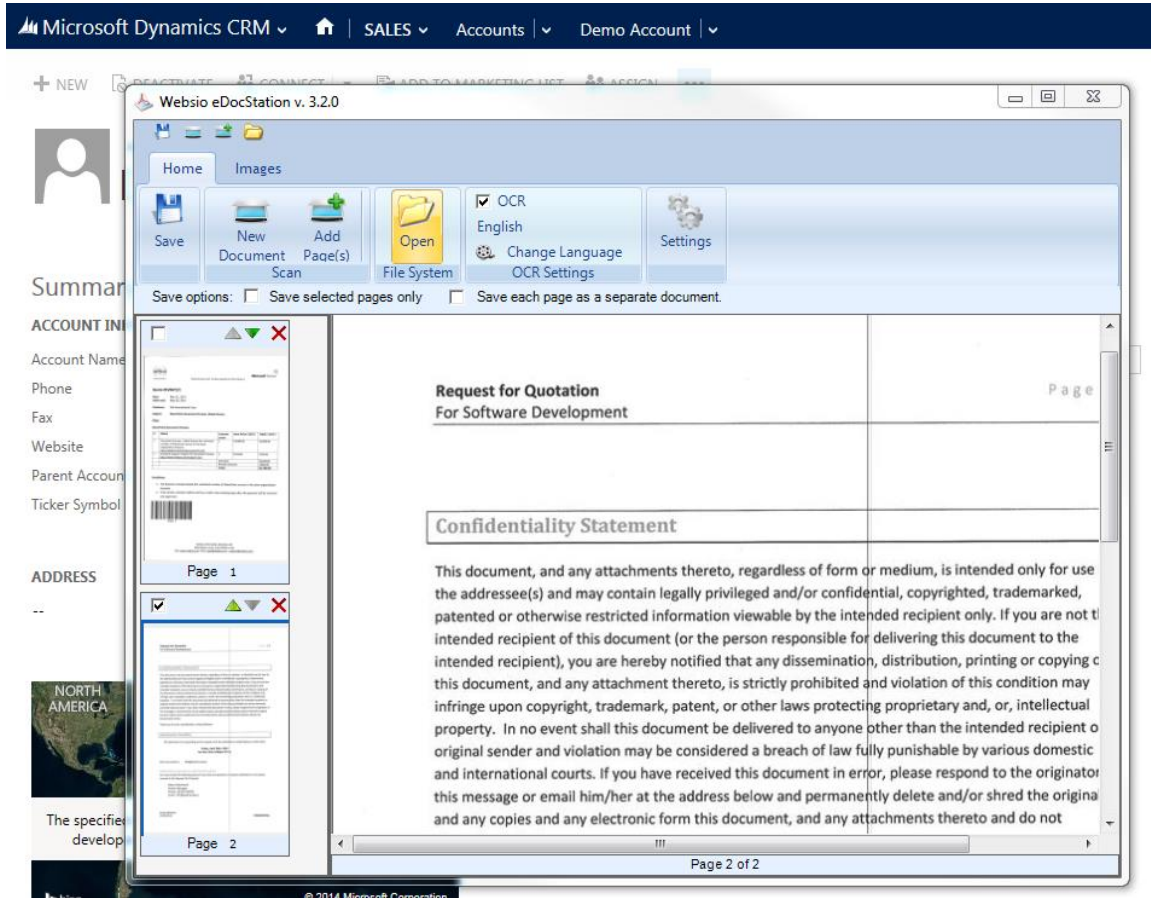
New | Add | Open SharePoint | Actions

	Name	Modified	Barcode
	barcode_demo_1	1/8/2014 11:50 PM	9762;16;RO18363670
	barcode_demo_2	1/8/2014 11:50 PM	151766;59;1630530320796
	barcode_demo_3	1/8/2014 11:51 PM	5547;7;RO18012571;8



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CRM and OCR Plug-in client - The eDocStation



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<http://www.websio.com> sales: sales@websio.com support: support@websio.com



Requirements

Server Requirements

- Microsoft Dynamics CRM 2013 or 2015

Client Software Requirements

- Windows 7 / Windows 8.x / Windows 10
- Microsoft Internet Explorer 9.0 or greater. Microsoft Edge, Chrome or Firefox
- Microsoft .NET Framework 4 or greater

Scanner Requirements

Local-connected and network-connected scanners have to be correctly defined on the workstation. Usually it is enough to install correct scanner drivers. Please refer to your scanner documentation.

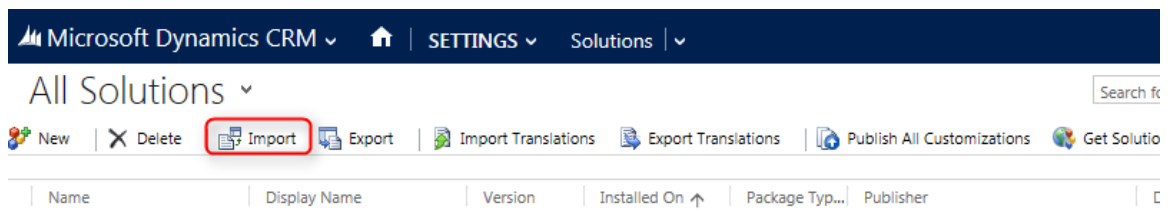
To test that your scanner is correctly defined, try to scan from one of the standard Microsoft programs like Paint or Microsoft Clip Organizer



Installation

CRM installation

1. Open Dynamics CRM. You must belong to CRM security role "System Administrator".
2. Go to "Settings" -> "Solutions" and click on the "Import"

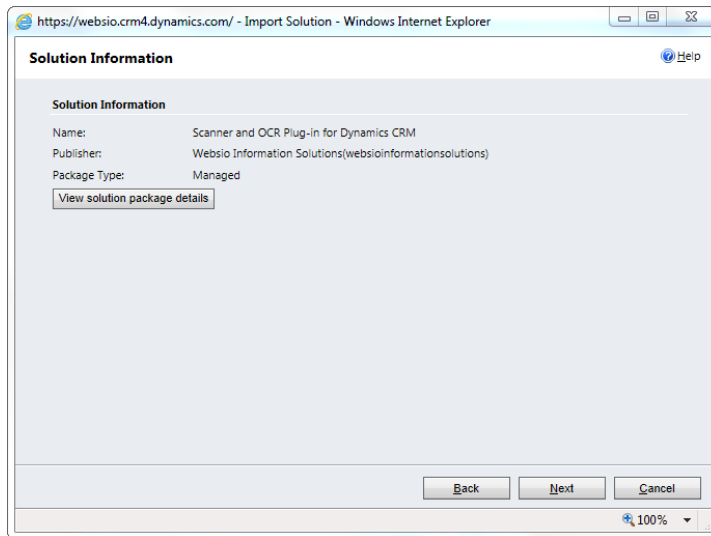


3. In File Open dialog, select managed solution file
"WebsioCRMScannerOCRPlugin_x_y_z_managed.zip" (included in the directory server of the crmplugin.zip).

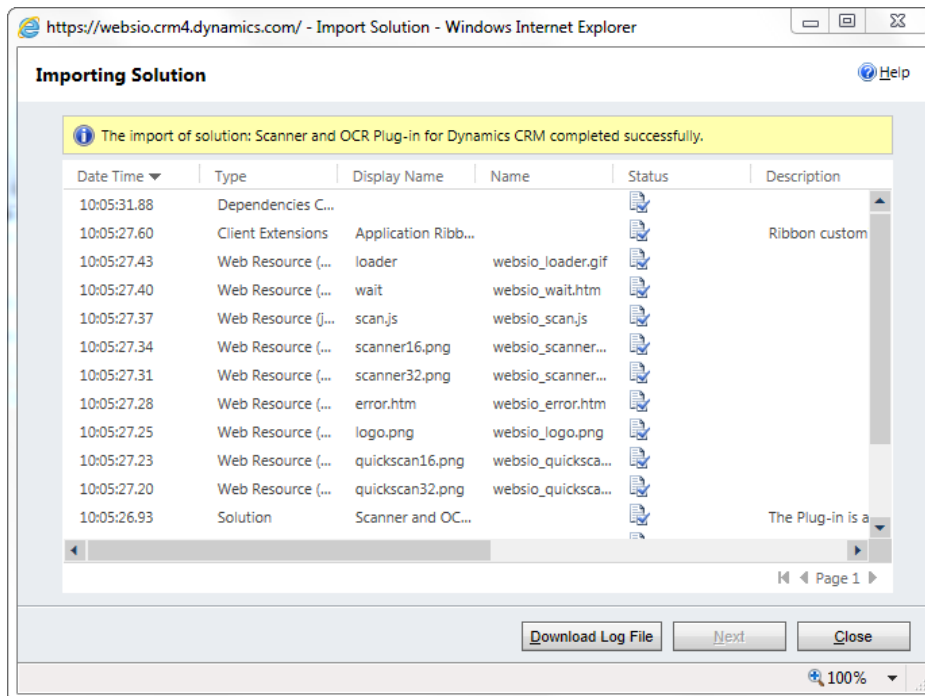


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4. Press "Next". Solution Information screen will appear. Press "Next" again:



5. The solution will be imported. Press "Close".



See section “[Special Settings](#)” for CRM Online or Internet Facing Deployment



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Client-side installation

1. Unzip directory "eDocStation" from the crmplugin.zip file on your client machine
2. **Important!** Right-click the "setup.exe" and select "Run as Administrator" in order to begin the plug-in installation wizard.

Please pay attention! Scanner Plug-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site:

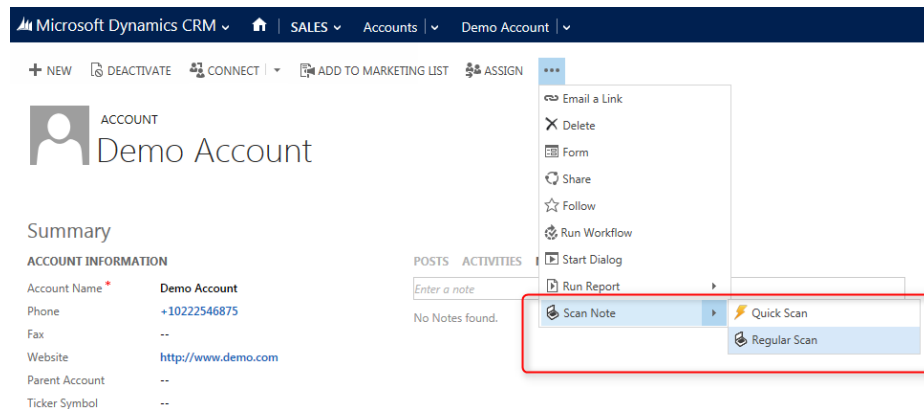
<http://www.websio.com/product.aspx?ID=128>



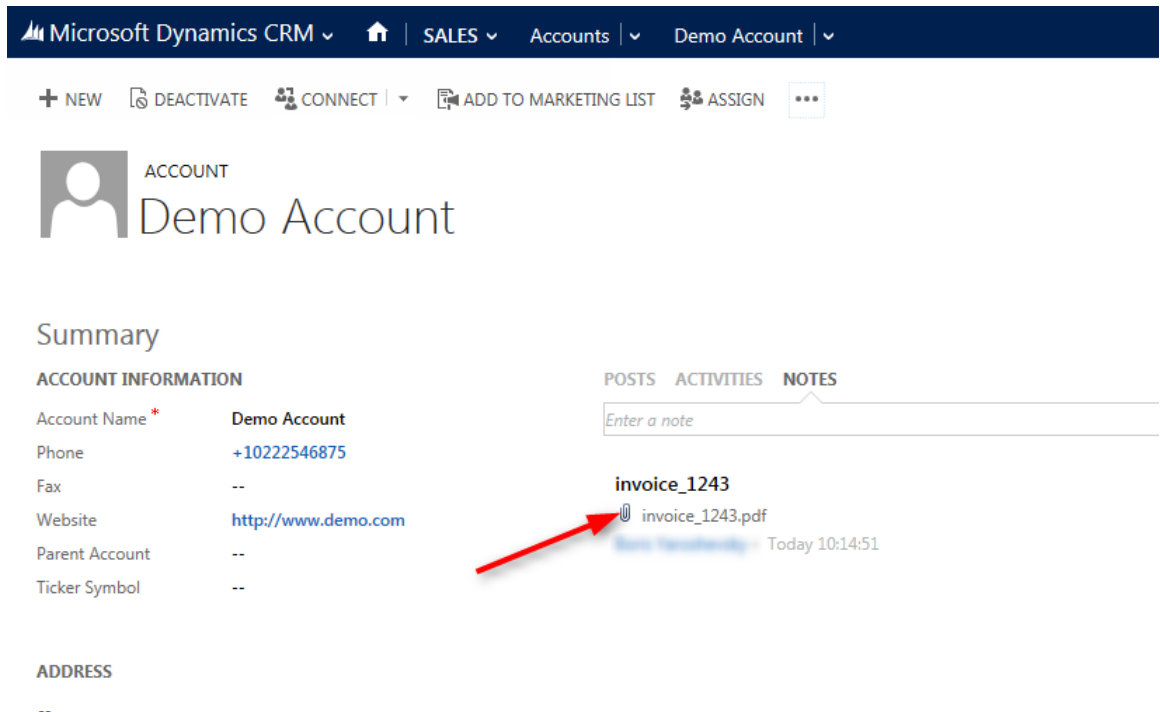
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How to use

1. When the installation has been completed successfully, you can find new “Scan” options:
 - a. Actions menu of each CRM entity



These menu items save scanned or composed documents as note with attachment to the current entity:





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b. On the “Documents” pane of each document-enabled CRM entity:

Microsoft Dynamics CRM | SALES | Accounts | Demo Account | Create

ACCOUNT
Demo Account
Annual Revenue

Document Locations: Documents on Default Site 1

+ ADD LOCATION | EDIT LOCATION | SCAN DOCUMENT |

New | Add | Open SharePoint | Actions

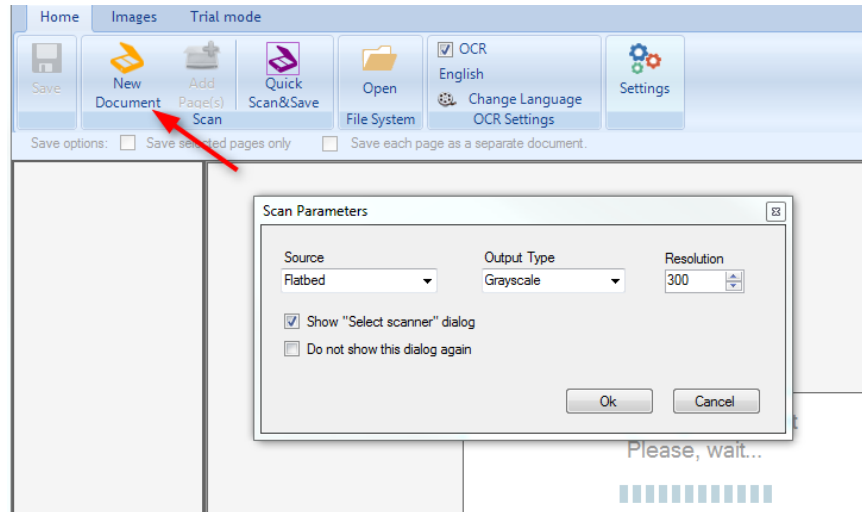
	Name	Modified	Barcode
	barcode_demo_1	1/8/2014 11:50 PM	9762;16;RO18363670
	barcode_demo_2	1/8/2014 11:50 PM	151766;59;1630530320796
	barcode_demo_3	1/8/2014 11:51 PM	5547;7;RO18012571;8



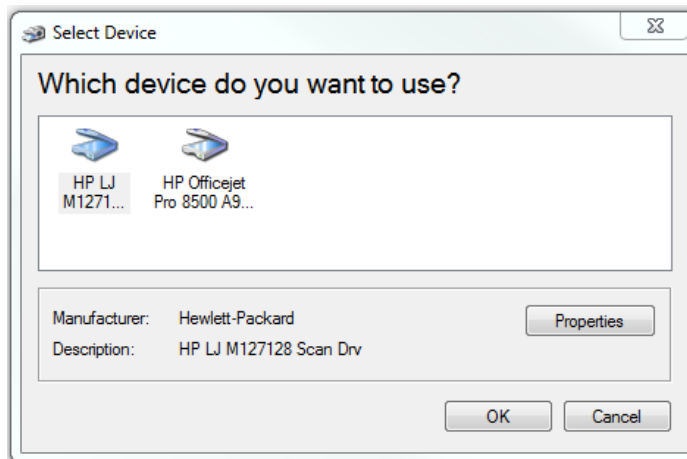
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Regular Scan Mode

1. Click on the "New Document" and select scan parameters



2. Select scanner



** That step may be omitted by unchecking option "Show Select Scanner dialog" on the previous screen or in the eDocStation settings.*

3. Click "OK" and complete scan process.



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4. Scanned pages:

The screenshot shows the Websio eDocStation v. 4.0.1 - Trial Version interface. The main window displays a scanned document with a 'PURCHASE ORDER' form. The form includes fields for Business, Name, Address, City, ST, Zip, and Phone. The Business is 'Water Drinking Corporation', Name is 'Mr. Dolphin Shark', Address is 'Gulf Stream 5', City is 'Atlantic Town', ST is '882254', and Phone is '+1 (100) 988-8333'. The form also includes a 'P.O. NUMBER' field with the value '89540'. The Vendor is 'Hewlett-Packard' with address '10810 Farnam Dr., Omaha NE 68154' and phone '1-800-888-3224'. The Ship To field is empty. The form also includes a table for 'P.O. DATE', 'REQUISITIONER', 'Contract name / Number', 'F.O.B. POINT', and 'TERMS'. The table has one row with values: 'P.O. DATE', 'REQUISITIONER', 'Contract name / Number', 'F.O.B. POINT', and 'TERMS'. The table also includes a 'UNIT PRICE' and 'TOTAL' column. The interface also shows a 'Save' button and a 'Settings' button. The status bar at the bottom indicates 'Page 1 of 2'.

5. Click on the "Save" button, enter document name and select format:

The screenshot shows the 'Save to SharePoint' dialog box. It has a 'Name:' label followed by a text input field. To the right of the input field is a dropdown menu currently set to 'PDF'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Select option "Always use auto name" in the eDocStation settings to avoid this step.

When you use the Plug-in to save document as attachment, the Plug-in uploads document and completes the process.



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Microsoft Dynamics CRM | SALES | Accounts | Demo Account

NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | ...

ACCOUNT
Demo Account

Summary

ACCOUNT INFORMATION

Account Name	Demo Account
Phone	+10222546875
Fax	--
Website	http://www.demo.com
Parent Account	--
Ticker Symbol	--

ADDRESS

--

POSTS | ACTIVITIES | NOTES

Enter a note

invoice_1243

invoice_1243.pdf

Ben Thompson Today 10:14:51

1. When you use the Plug-in from the "Documents" pane and destination library profile contains required properties, document profile will be displayed.

Microsoft Dynamics CRM | SALES | Accounts | Demo Account

ACCOUNT
Demo Account

Documents

SCAN DOCUMENTS

Name

demo2

demo2

demo2

Edit Document Properties -- Webpage Dialog

EDIT

Save Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

Name * demo2 .pdf

Title

free name *

CRM

Type the Web address: (Click here to test)

/CRMDemoCompany/main.aspx#632467107

Type the description:

CRM

Barcode

Save Cancel

http://sps2013dev/crmgrid/dialogcontainerpage.aspx?p Local intranet | Protected Mode: Off

Result:



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Microsoft Dynamics CRM | SALES | Accounts | Demo Account



ACCOUNT

Demo Account

Document Locations: Documents on Default Site 1

+ ADD LOCATION | EDIT LOCATION | SCAN DOCUMENT

	New	Add		X	Open SharePoint	Actions
<input type="checkbox"/>	Name	Modified	Barcode			
	barcode_demo_1	1/8/2014 11:50 PM	9762;16;RO18363670			

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Additional save options:

1. Save selected pages only:
 - Select checkbox “Save selected pages only”
 - Select pages
 - Click on the button “Save”

The screenshot shows the Websio eDocStation v. 4.0.1 application window. The top menu bar includes Home, Images, Properties, and Recognition. Below this is a toolbar with icons for Save, New Document, Add Page(s), Open, OCR, English, Change Language, and Settings. A status bar at the top indicates 'Save options: ☒ Save selected pages only ☐ Save each page as a separate document.' The main area displays a document form with fields for Business, Name, Address, City, ST, Zip, and Phone. The form is titled 'BILL TO:' and 'PURCHASE ORDER'. The document is divided into three pages, with the first page visible. Red arrows point to the 'Save selected pages only' checkbox in the status bar and the checkboxes for selecting pages in the document preview on the left.

Webzio eDocStation v. 4.0.1

Home Images Properties Recognition

Save New Document Add Page(s) Open OCR English Change Language Settings

Save options: ☒ Save selected pages only ☐ Save each page as a separate document.

Page 1

Page 2

Page 1 of 3

BILL TO:

Business: Water Drinking Corporation

Name: Mr. Dolphin Shark

Address: Gulf Stream S

City, ST Zip: Atlantic Town 882254

Phone: +1 (100) 988-8333

The following number must appear on all related Correspondence, shipping papers, and invoices:

Accounts payable contact:

Phone: dolphin@gulfstream.atl

E-mail:

P.O. NUMBER: 89540

Vendor: (NOTE: Please only use info below)

Ship To: (site to be shipped to)

Hewlett-Packard

Attn: State & Local / Higher Ed / K-12 Sales

10810 Farnam Dr.

Omaha NE 68154

Voice: 1-800-888-3224

Fax: 1-800-825-2329

Name:

Company:

Address:

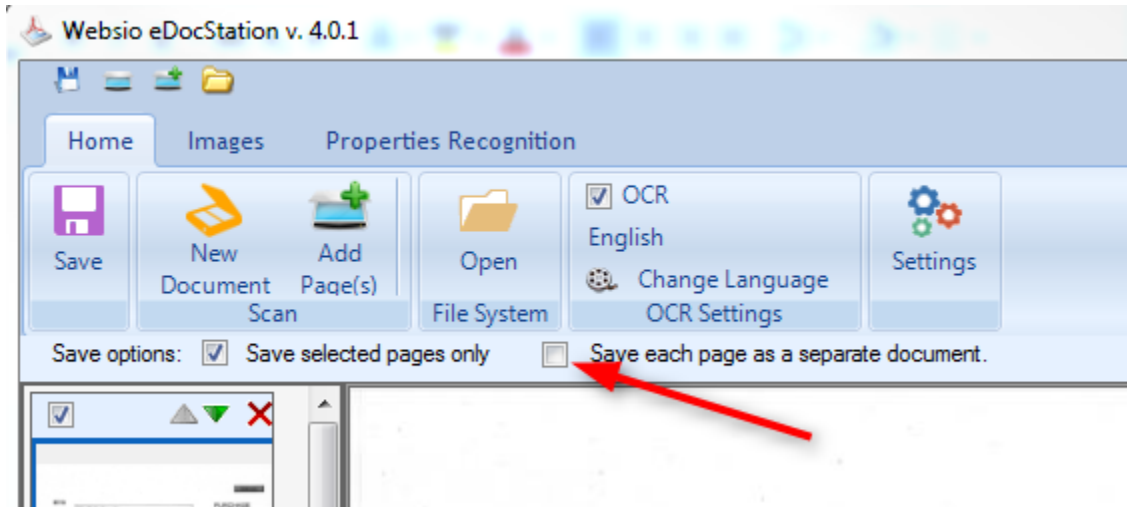
City, State ZIP:

Phone:



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2. You can save each page as a separate document:





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Quick Scan Mode

1. Select option "Quick Scan" from the drop-down menu.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'SALES', 'Accounts', and 'Demo Account'. Below this, there are action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', and 'ASSIGN'. The main content area displays 'ACCOUNT Demo Account' with a summary section. On the right, a dropdown menu is open, showing options like 'Email a Link', 'Delete', 'Form', 'Share', 'Follow', 'Run Workflow', 'Start Dialog', 'Run Report', 'Scan Note', and 'Quick Scan'. The 'Quick Scan' option is highlighted with a red box.

OR

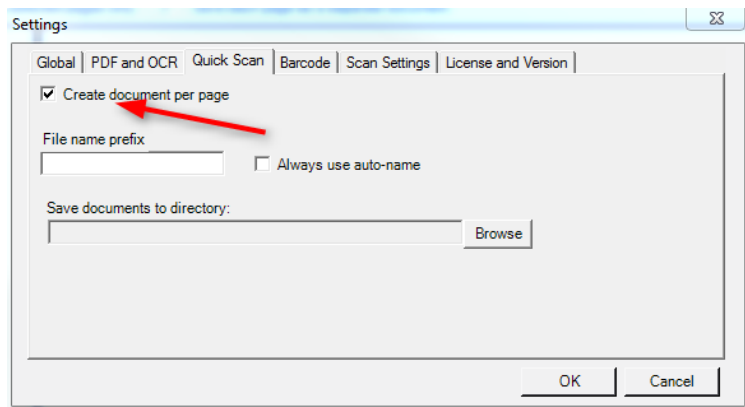
The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with 'Microsoft Dynamics CRM', a home icon, 'SALES', 'Accounts', and 'Demo Account'. Below this, there is a section for 'ACCOUNT Demo Account'. Underneath, there is a section titled 'Document Locations: Documents on Default Site 1'. Below this, there is a table with columns: 'SCAN DOCUMENT', '+ ADD LOCATION', 'EDIT LOCATION', 'Open SharePoint', and 'Actions'. The 'SCAN DOCUMENT' dropdown menu is open, showing options like 'Quick Scan' and 'Regular Scan'. The 'Quick Scan' option is highlighted with a red box.

SCAN DOCUMENT	+ ADD LOCATION	EDIT LOCATION	Open SharePoint	Actions
Quick Scan				
Regular Scan				
barcodedemo	6/11/2014 9:16 PM	value 1	CRM	
demo_2014611211021	6/11/2014 9:10 PM		CRM	
demo1	6/11/2014 9:06 PM		CRM	



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2. New document(s) will be scanned and saved automatically. The eDocStation window will not be displayed.
3. Document names will be generated automatically using prefix defined in the Quick Scan settings (see paragraph "Settings").
4. To save each page as a separate document in the Quick Scan mode, select option "Create document per page" in the eDocStation Quick Scan settings



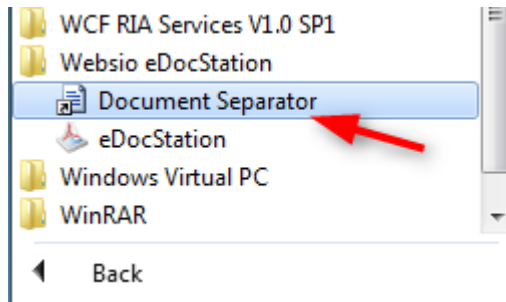
Document Separator Sheets

A separator sheet allows the scan application to detect when a new document should be started. It helps the scan operators to increase productivity and organize a stack of paper into logical documents. That eliminates the need for individually scan of each document either.

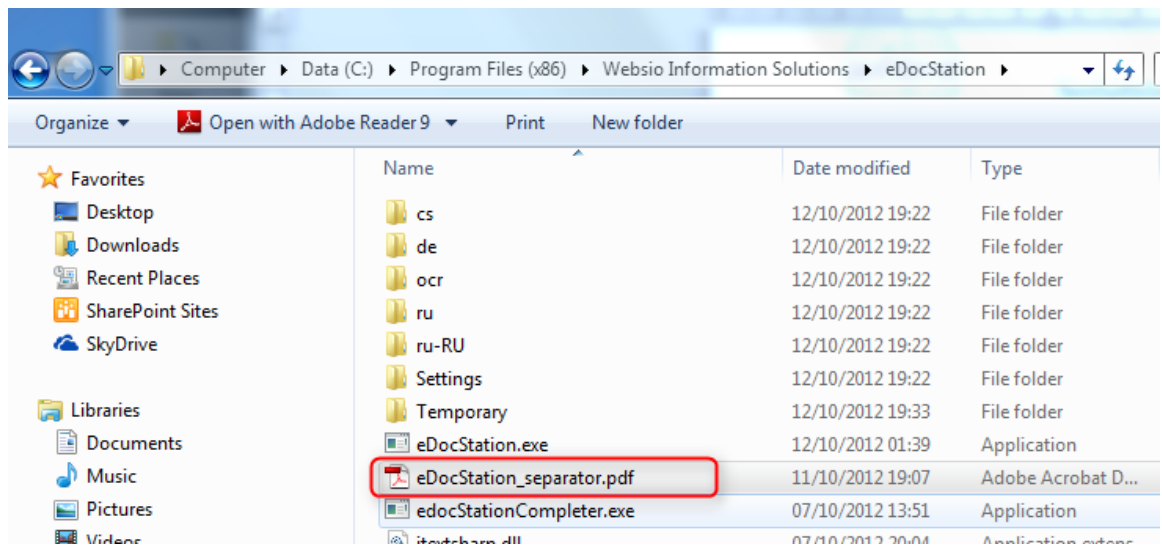
1. Select option "Use Document Separator Sheets" in the eDocStation settings
2. Print Document Separator Sheet:
 - a. Open Document Separator Sheet from the "Start->All Programs -> Websio eDocStation"



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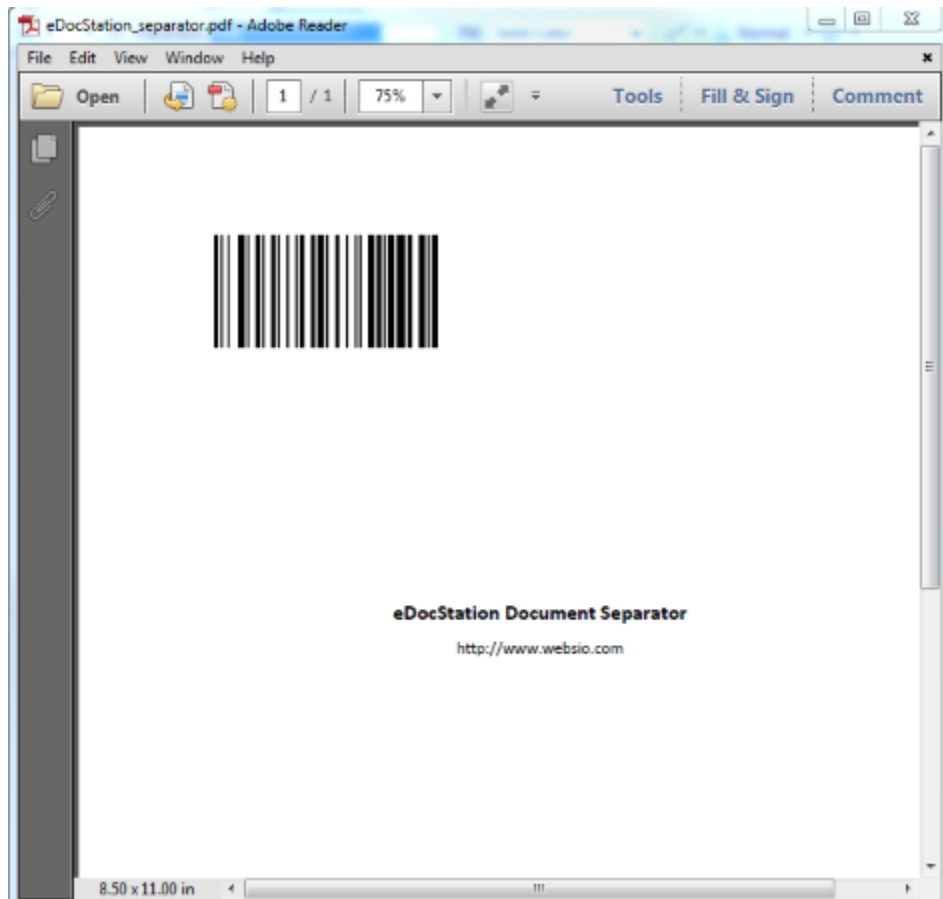


or from the eDocStation installation folder





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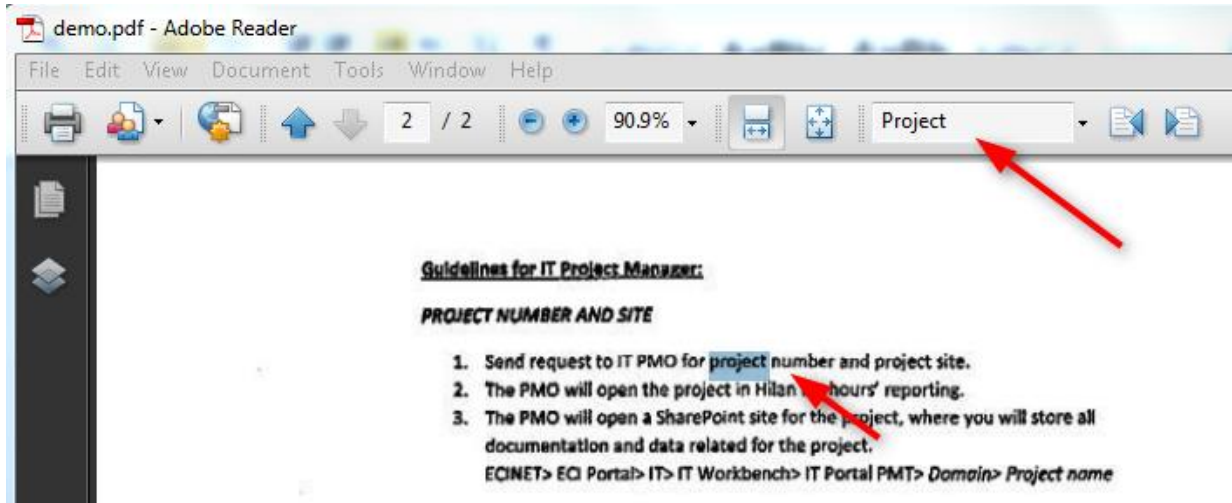


- b. Print Separator Sheet in A4 format in a high quality.
- 3. Separate documents in the scanner feeder by previously printed sheets
- 4. Scan documents using the Plug-in. Quick Scan mode is recommended but not required.

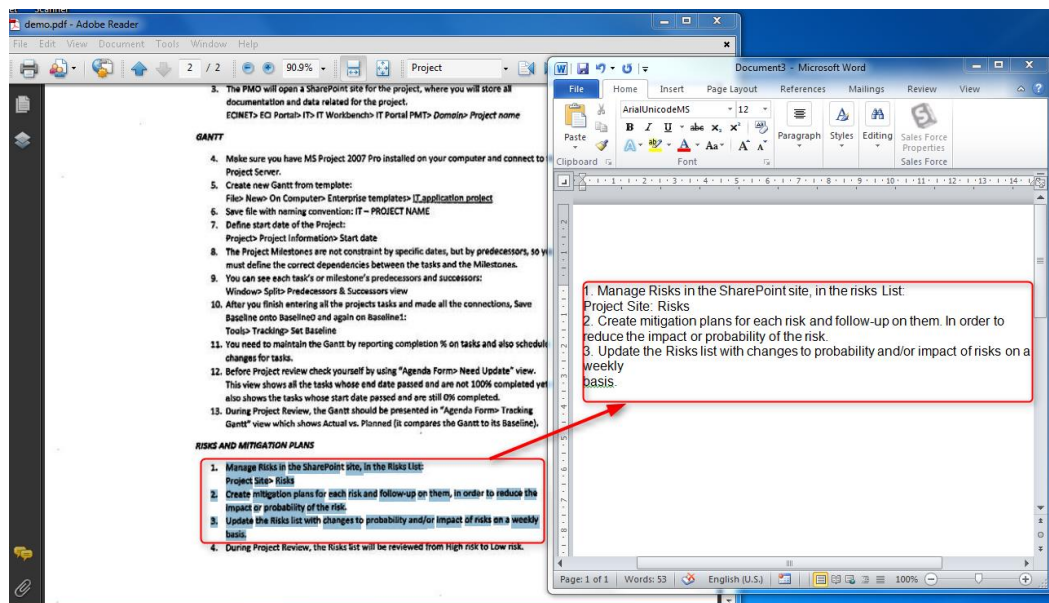
OCR – convert images to searchable PDF

Searchable PDF (document created using OCR process) advantages:

- Search documents by content using standard SharePoint search engines
- Search text in the document:

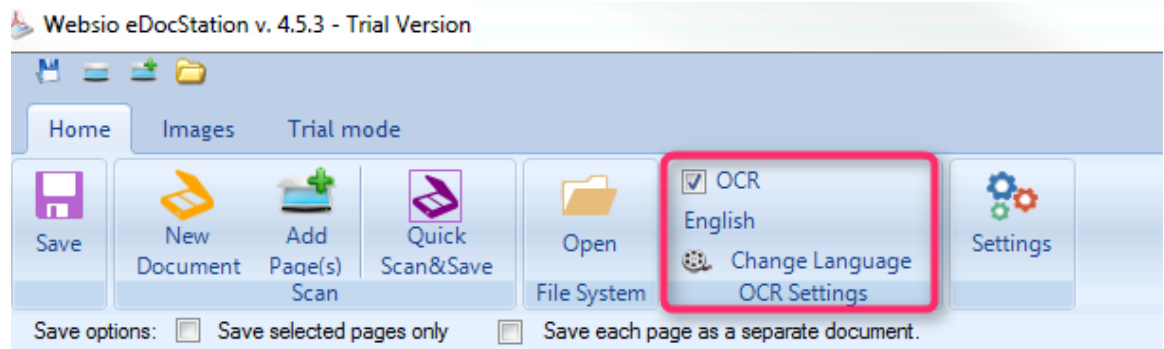


- Copy text from the document:

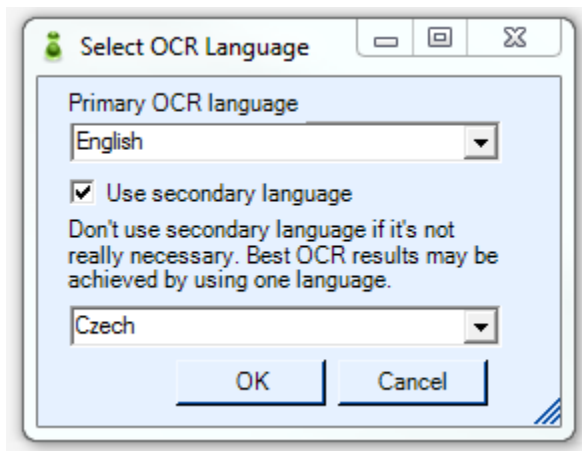


The best OCR (text recognition) quality can be reached for images scanned in grayscale with 300 dpi resolution.

1. Select checkbox "OCR" and document languages to create searchable document.



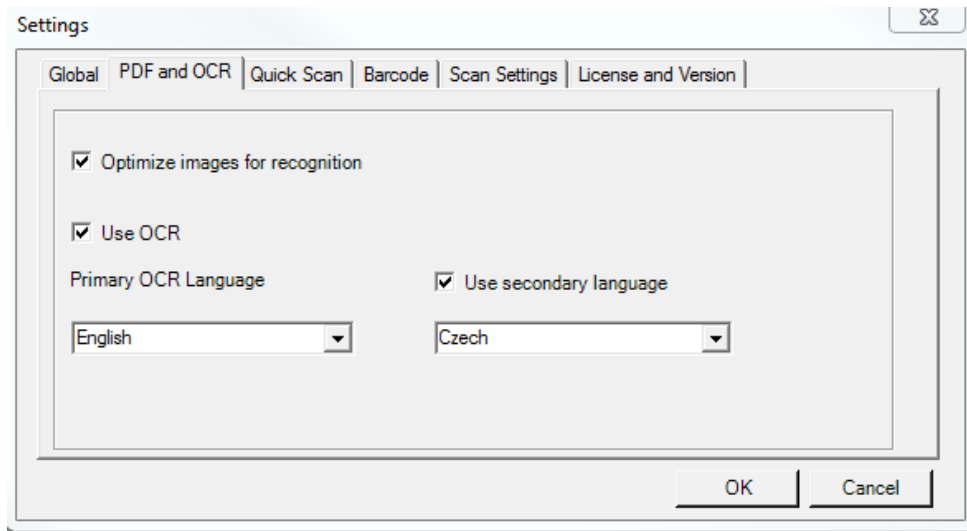
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.



2. Set default OCR parameters using eDocStation settings:



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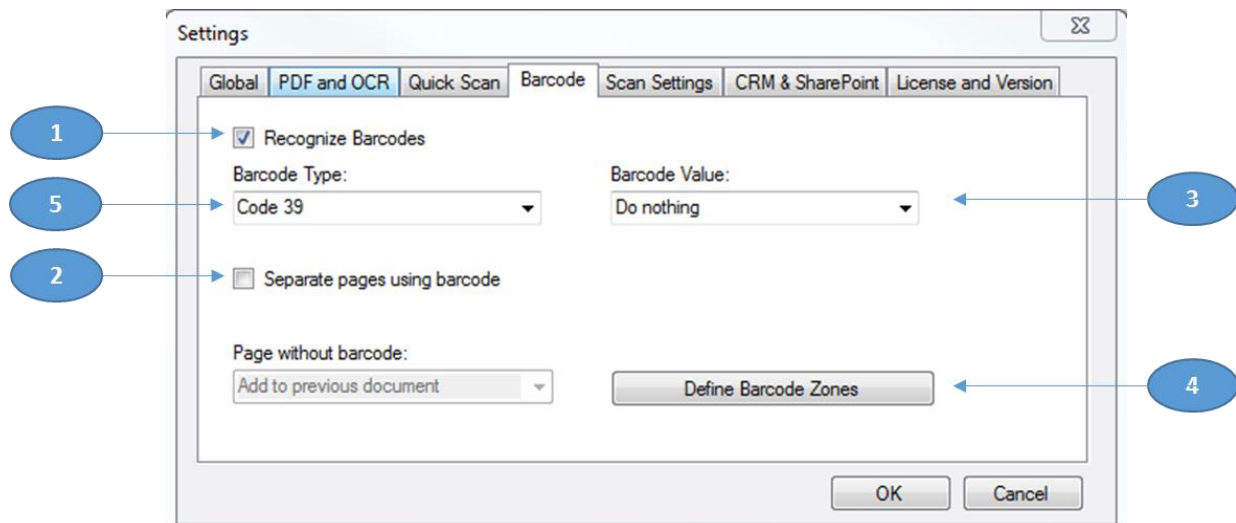


Important! Scanner and OCR Plug-in *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site:
<http://www.websio.com/product.aspx?ID=128>

3. OCR process runs during document save process. The process may take some time, depending on the pages count and original images quality.
4. OCR is available for all scan modes: Regular Scan, Quick Scan and Document per page mode.

Barcodes

Define barcode recognition settings using Barcode tab of the Settings window.



Turn barcode recognition on

Select checkbox "Recognize barcodes" (1)

Select barcode type (5).

Supported types: Codabar, Code 11, Code 128, Code 25, Code 39, Code39 Extended, Code 93, Code 93 Extended, Data Matrix, Deutsche Post Identcode, Deutsche Post Leitcode, EAN 128, EAN 13, EAN 14, EAN 8, Interleaved 25, ITF 14, ITF 6, MSI, OPC, PDF 417, PDF 417 Macro, Planet PostNet, PZN, QR Code, Royal Mail 4-State, RSS 14, RSS 14 Truncated, RSS Expanded, RSSLimited, SCC14, Singapore Post 4-State, SSCC 18, Swiss Post Parcel, UPCA, UPCE, USPS.

Default value: Code 128.

Separate pages using barcodes

Barcode-based pages separation allows the scan application to detect when a new document should be started. It helps the scan operators to increase productivity, allowing them to organize a stack of paper into logical documents. That eliminates the need to scan each document separately.

Select checkbox (2) to activate this option.



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You can select behavior for pages without barcodes using option “Page without barcode” (4):

1. Add to previous document
2. Save as a separate document

Barcode Value

This feature is available for SharePoint only. See User Guide for SharePoint Scanner Plug-in.

Barcode Zones

Barcode recognition on the entire page surface is a time-consuming process. The best way to reduce barcode recognition time is to define barcode zones.

Barcode zone is a rectangle where the eDocStation looks for the barcode. You can define as many barcode zones as you wish. Of course, reducing count of barcode zones will reduce barcode recognition time.

Important rules:

1. When barcode zones are not defined, the eDocStation looks for barcode on the entire page
2. When one or more barcode zones are defined, the eDocStation looks for barcode in the barcode zones only.



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How to define barcode zones:

1. Load page containing barcode

The screenshot shows the Websio eDocStation v. 4.0.1 - Trial Version interface. The top menu bar includes Home, Images, and Trial mode. Below the menu bar are several buttons: Save, New Document, Add Page(s), Open, OCR, English, Change Language, OCR Settings, and Settings. The OCR checkbox is checked. Below the buttons are save options: ☐ Save selected pages only and ☐ Save each page as a separate document.

The main area displays a document preview on the left and a table on the right. The document preview shows a page with a barcode and the text "Page 1". The table has the following data:

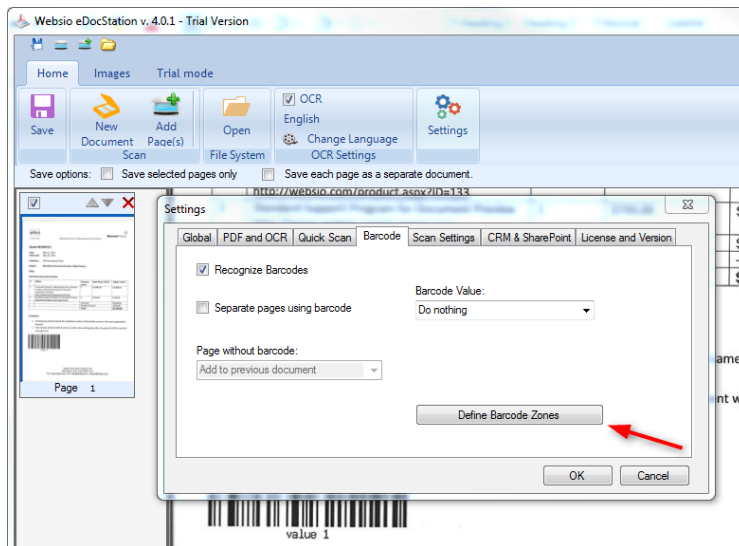
2	http://websio.com/product.aspx?ID=133	1	\$735.00
			Sub-total:
			Reseller Discount
			Total:

Below the table, the "Conditions:" section lists two items:

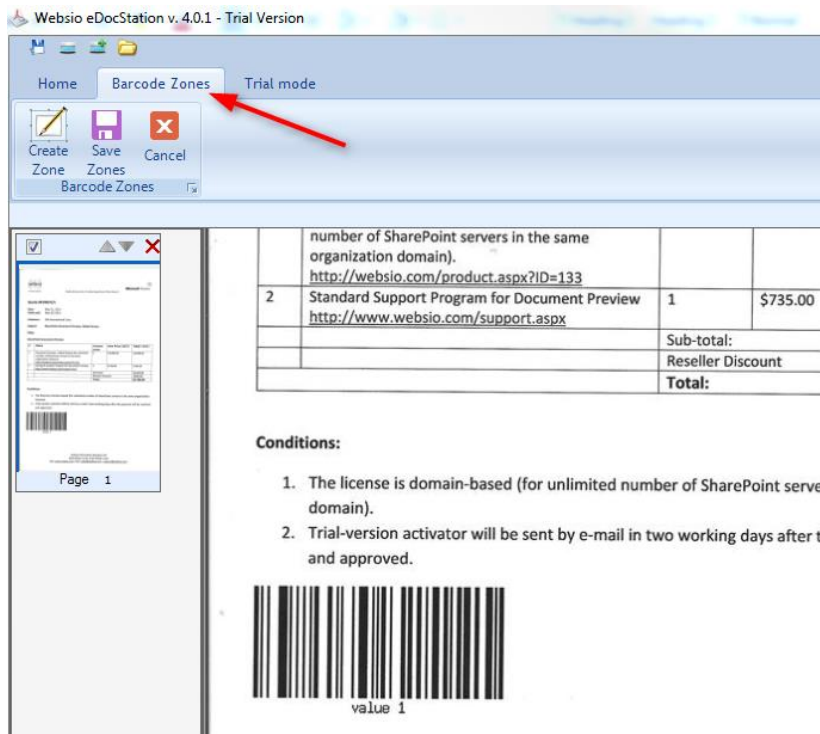
1. The license is domain-based (for unlimited number of SharePoint servers in domain).
2. Trial-version activator will be sent by e-mail in two working days after the purchase and approved.

At the bottom, there is a large barcode with the text "value 1" below it.

2. Go to Settings -> Barcode and click on the "Define barcode zones"



3. New tab "Zones" will be displayed. Existing zones will be shown on the image surface.



4. Create new zone:

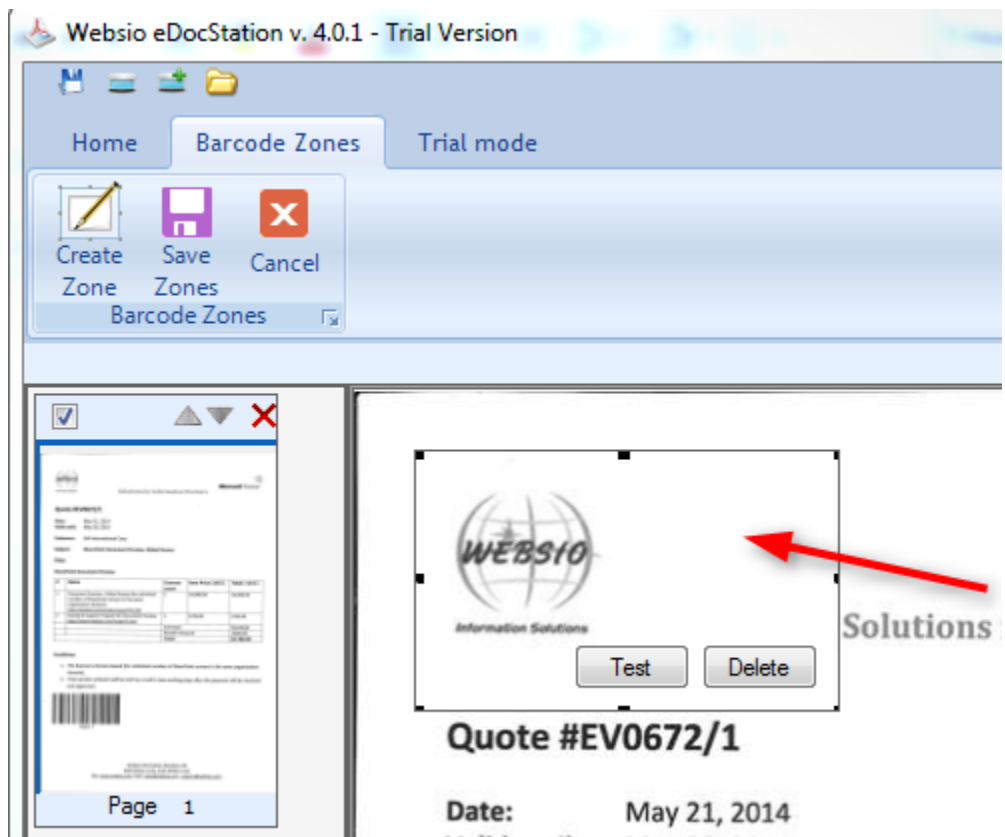


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- Click on the button "Create Zone"



- Zone selector will be added to the top-left corner of the image surface





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- Drag zone selector to the barcode and resize it as required.

Webzio eDocStation v. 4.0.1 - Trial Version

Home Barcode Zones Trial mode

Create Zone Save Zones Cancel Barcode Zones

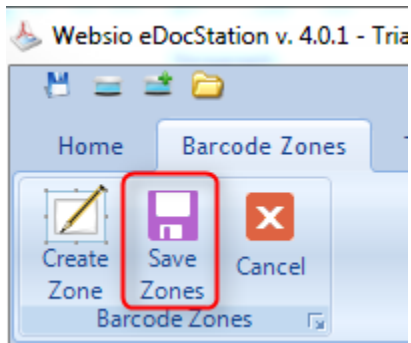
2	Standard Support Program for Document Preview http://www.websio.com/support.aspx	1	\$735.00
			Sub-total:
			Reseller Discount
			Total:

Conditions:

1. The license is domain-based (for unlimited number of SharePoint servers in the s: domain).
2. Trial-version activator will be sent by e-mail in two working days after the payer and approved.

value 1 Test Delete

Add additional zone selectors (if required) and press the button "Save Zones"

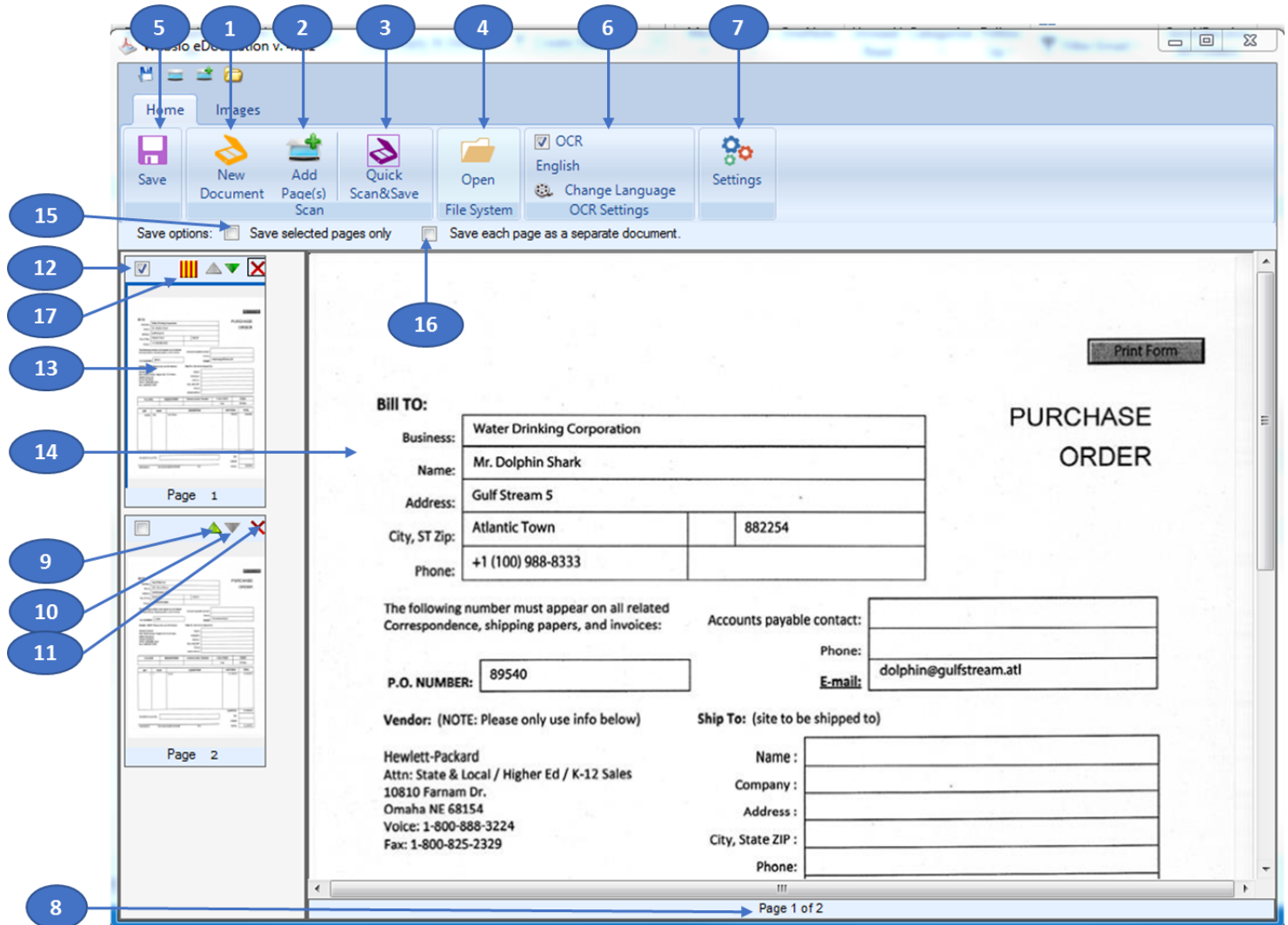


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User Interface

Main view. Tab "Home"



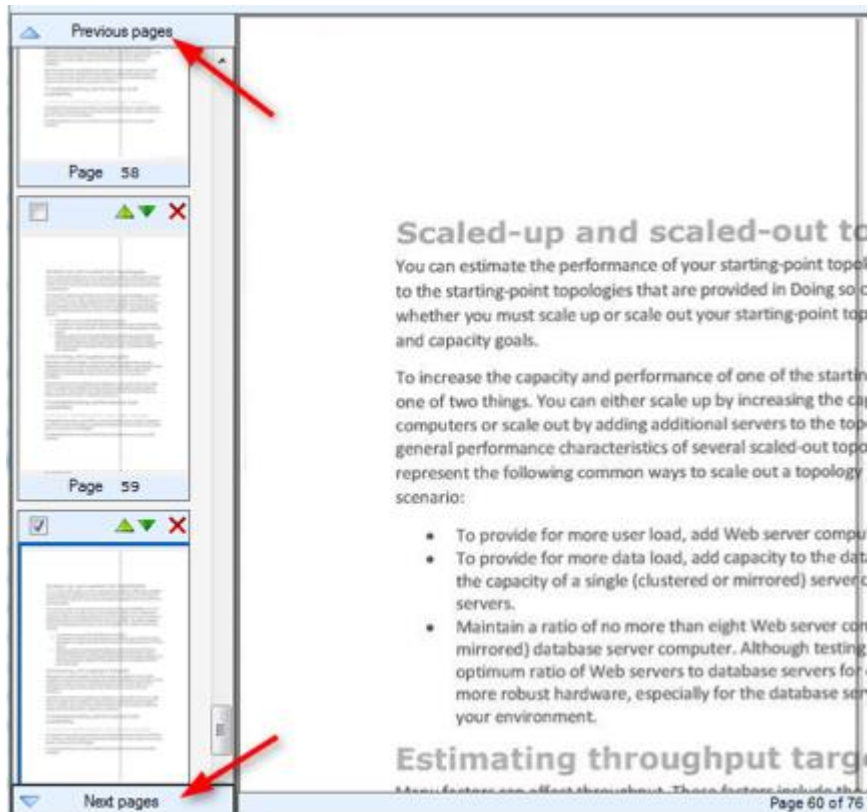
1. New Document. Use this button to scan new document.
2. Add Page(s). Scan pages and add them to the current page set
3. Quick Scan & Save.
4. Open. Add pages from existing image files from the file system.



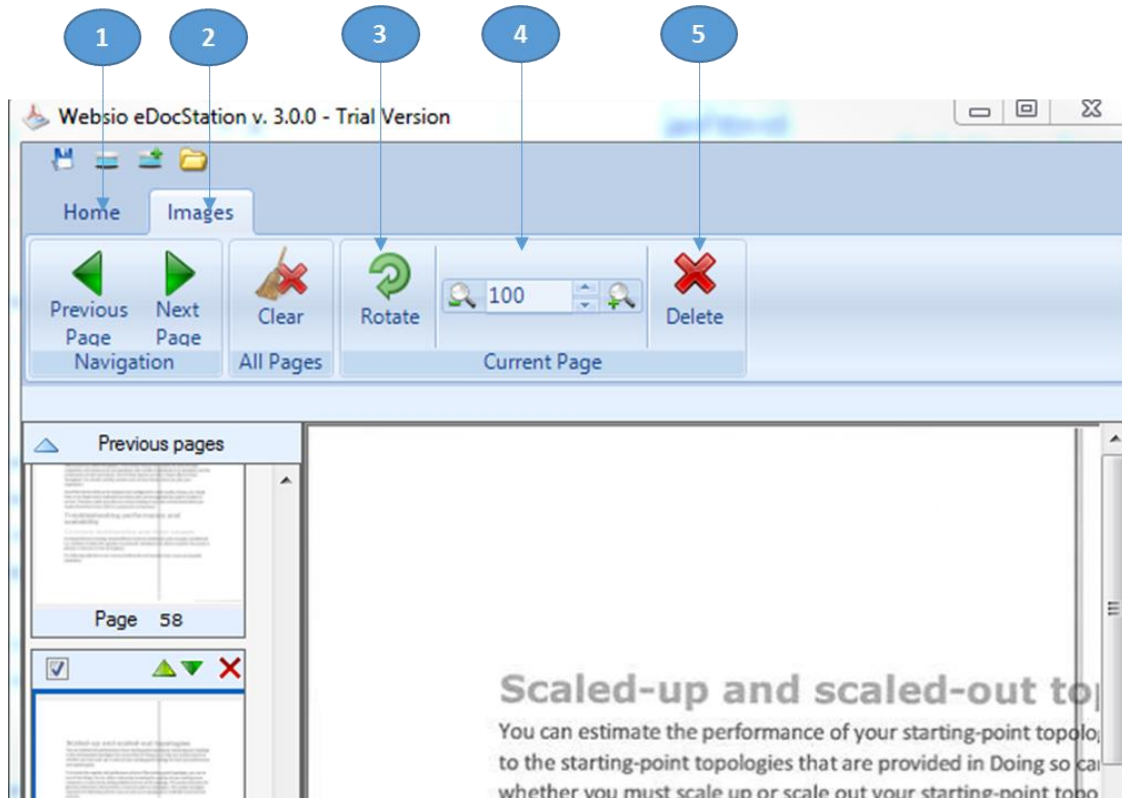
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5. Save. Save the document(s).
6. OCR. Select OCR checkbox to use text recognition process.
7. Settings.
8. Current page number and total pages count
9. Move page up.
10. Move page down.
11. Delete page
12. Page selector.
13. Page thumbnail
14. Main view
15. Save selected pages only. Select this option to create document from selected pages only.
16. Save each page as a separate document.
17. Button "View page properties". Available for scan from SharePoint only.

Thumbnails zone displays up 30 thumbnails. When pages count exceeds 30 pages, buttons “Previous pages” and “Next pages” appear.

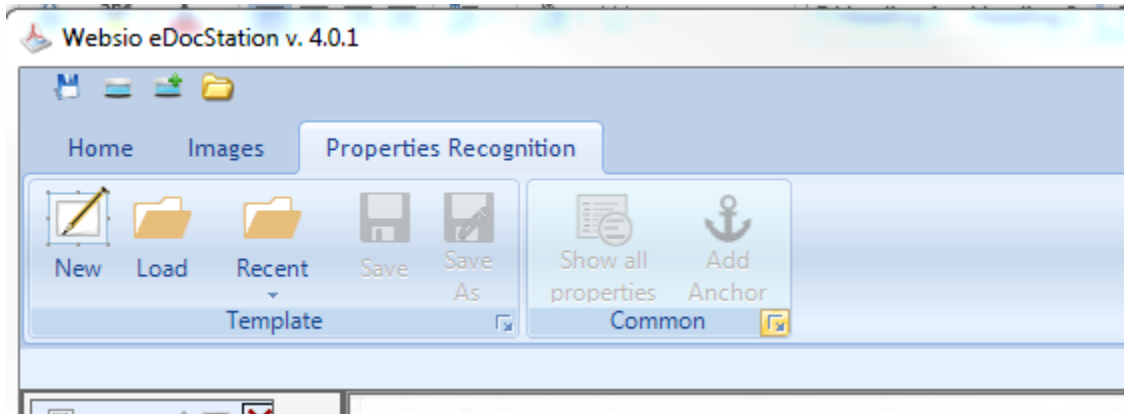


Tab "Images"



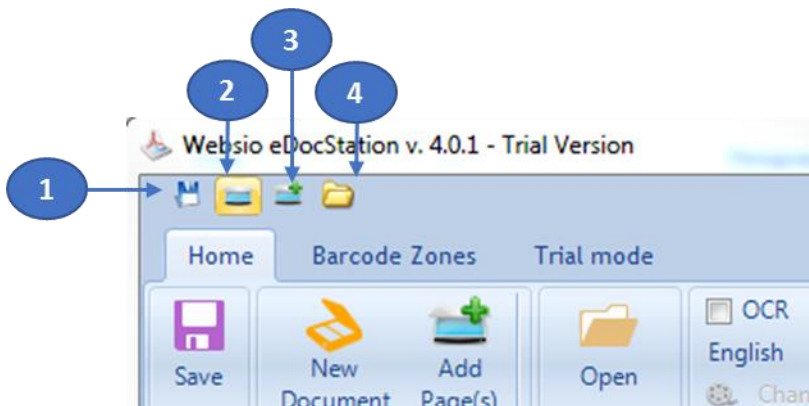
1. Navigation buttons
2. Clear. Delete all pages.
3. Rotate image.
4. Zoom
5. Delete current page

Tab “Properties Recognition”



Available for scan from SharePoint only

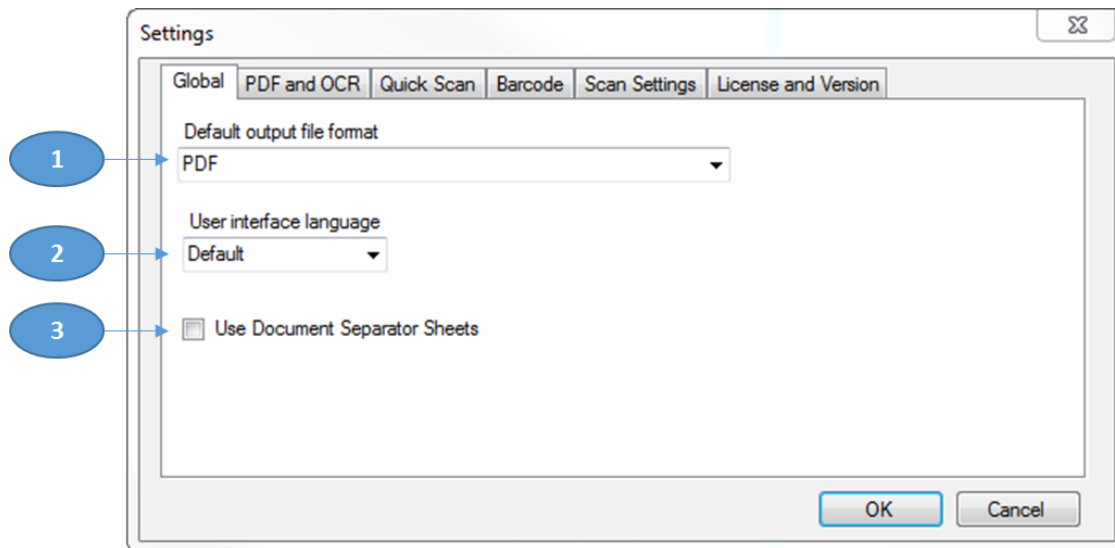
Quick Access Toolbar



1. Save.
2. Scan new document.
3. Add page(s). Scan new pages and add them to the current page set
4. Open. Add pages from existing image files, stored in file system.

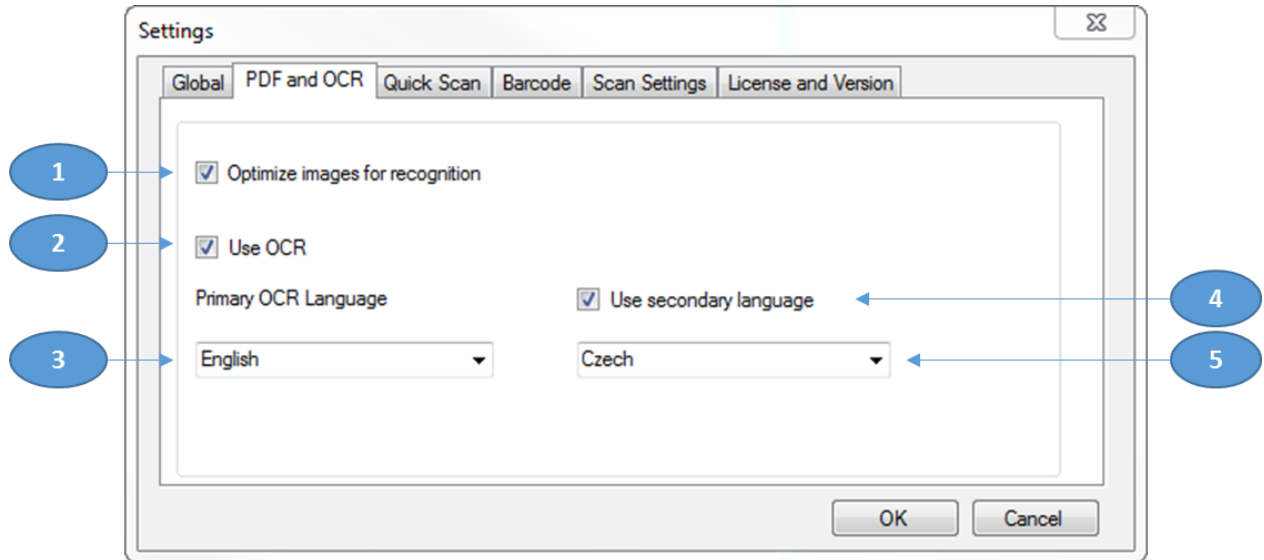
Settings

Global



1. Default output file format. The following formats are supported: PDF, TIFF, JPG, GIF, PNG or BMP
2. User interface language. English, German, Czech, Russian, Arabic and Hebrew languages are available.
3. Use Document Separator Sheets. See section "Document Separator Sheets" above.

PDF and OCR



1. Optimize image for recognition.
2. Use OCR – enable/disable OCR.
3. Default OCR languages.

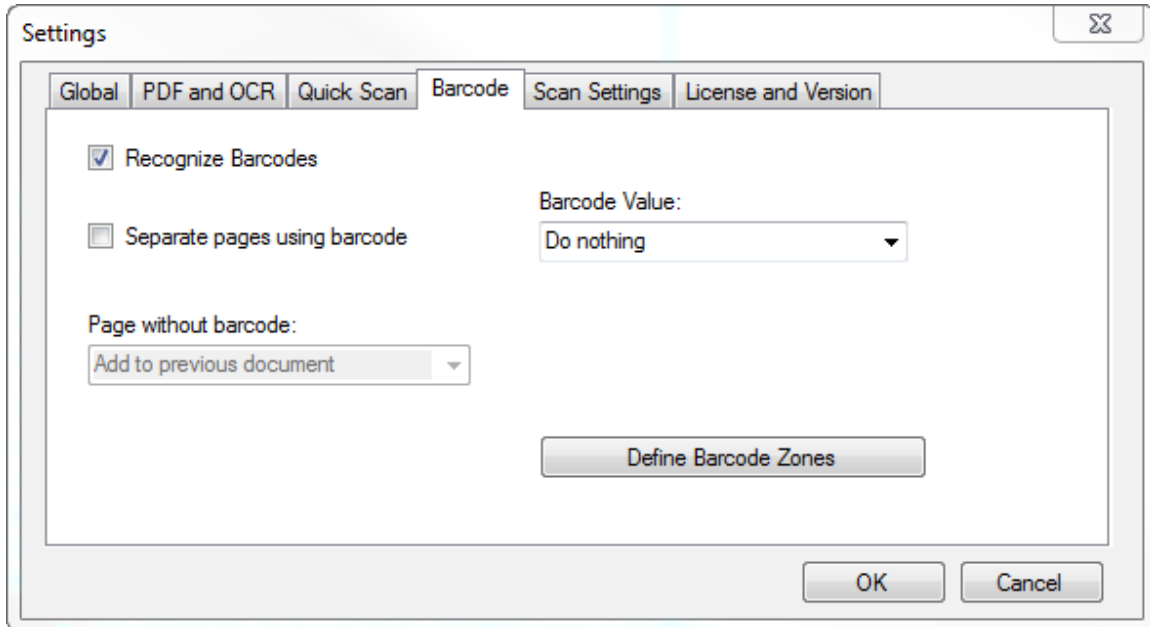
Important! Use secondary language when it is necessary - your documents have bi-lingual content. Best OCR results may be achieved by using single language.

Please pay attention: The eDocStation *out of the box* arrives with English OCR language pack only. Download and install additional OCR language packs from our site: <http://www.websio.com/product.aspx?ID=128>



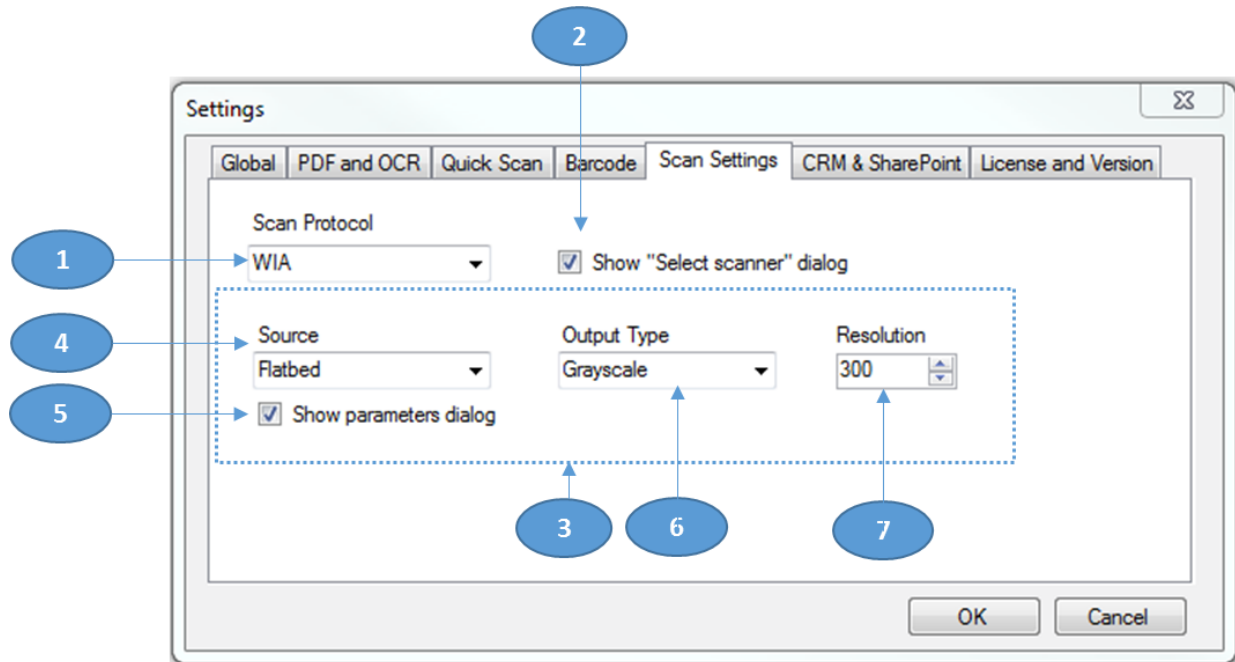
Solutions for information workers

Barcode



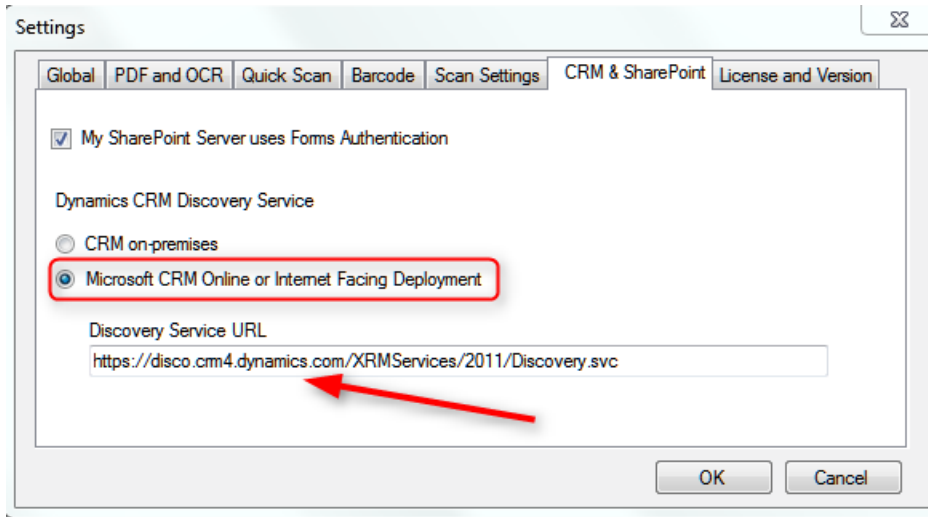
See section "[Barcodes](#)" above

Scan Settings



1. Scan protocol. TWAIN or WIA. Default value: WIA.
2. Show "Select Scanner" dialog. Select this option to select source scanner before scanning.
3. This group of options is available for WIA only.
When TWAIN protocol is selected, the eDocStation displays scanner-dependent dialog before scanning process. You can control paper source, resolution and other options from this dialog. Full set of available options depends on the software supplied with your scanner.
4. Source. Scan from flatbed glass or feeder.
5. Show parameters dialog before scan
6. Output type. Color, Grayscale or Black & White
7. Image resolution

Special Settings



If you use CRM Online or Internet Facing Deployment, select corresponding checkbox and fill Discovery Service URL. How to find Discovery Service URL:

1. Open your CRM site
2. Go to Settings->Customizations->Developer options



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A screenshot of the Microsoft Dynamics CRM web interface. The browser window shows the address bar with the URL "https://mybestfriend.crm4.dynamics.com/Customization - Microsoft ...". The page title is "Microsoft Dynamics CRM". The navigation bar includes "Microsoft Dynamics CRM", a home icon, "SETTINGS", and "Customizations". The main content area is titled "Developer Resources". Under "Your Organization Information:", it shows "Organization Unique Name: mybestfriend", "Windows Azure Service Bus Issuer Certificate" with "Issuer Name: crm4.dynamics.com" and a "Download Certificate" link, and "Developer Center" with a "Download documentation, tools and sample code" link. Under "Service Endpoints:", it lists "Discovery Service" with "Protocol: SOAP" and a URL "https://disco.crm4.dynamics.com/XRMServices/2011/Discovery.svc" which is highlighted with a red rectangle, and a "Download WSDL" link. Below this, it lists "Organization Service" with "Protocol: SOAP".



Solutions for information workers



Document Library Properties

1. When your destination document library contains required properties, document properties window will be opened automatically after the document will be uploaded.
2. CRM Scanner and PDF Plug-in can create link from the document to the related CRM entity:
 - a. Add to your document library/content type hyperlink property "CRM":

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library:

Column (click to edit)	Type	Required
Title	Single line of text	
free name	Single line of text	✓
CRM	Hyperlink or Picture	
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

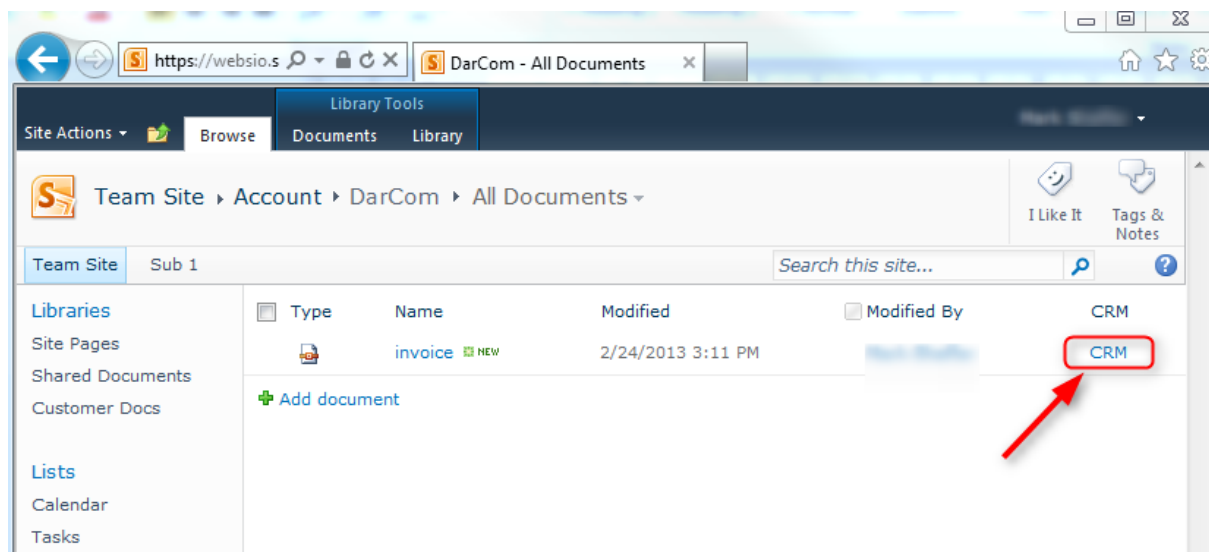
[Create column](#)

[Add from existing site columns](#)

[Column ordering](#)

[Indexed columns](#)

- b. This property will be automatically filled by CRM Scanner and PDF Plug-in:





Solutions for information workers

c. Click on the link to open related CRM entity:

Microsoft Dynamics CRM | SALES | Accounts | Demo Account | Create

+ NEW | DEACTIVATE | CONNECT | ADD TO MARKETING LIST | ASSIGN | ...

ACCOUNT

Demo Account

Annual Revenue: -- | No. of Employees: -- | Owner: --

Summary

ACCOUNT INFORMATION

Account Name *	Demo Account
Phone	+10222546875
Fax	--
Website	http://www.demo.com
Parent Account	--
Ticker Symbol	--

ADDRESS

--

AMERICA | EUROPE | ASIA | AFRICA

The specified credentials are invalid. You can sign up for a free developer account at [http://www.microsoft.com/dynamics/crm/developers](#)

POSTS

Enter post here | POST

Both | Auto posts | User posts

Demo Account
Account: Created By [User]
On Demo Account's wall
1/7/2014 5:34 PM

LIKE | REPLY | X

Primary Contact

--

CONTACTS

Full Name ↑ | Email

No Contact records found.

RECENT OPPORTUNITIES

Topic | Status ↑

No Opportunity records found.

Active

Troubleshooting

Error message "Problem with installation package" appears during installation process



Solution:

Right-click on the "setup.exe" and select "Run as Administrator" in order to begin the installation process.

After click on the "Scan Document" the eDocStation freezes or error is displayed.

1. Probably your scanner does not support selected scan protocol. Open the eDocStation settings and change scan protocol in the "Scan settings".

After scan on the Windows 8 / 10 GDI+ error is displayed.

1. Close all instances of the Internet Explorer. Launch Internet Explorer once as Administrator (right-click on the IE icon and select "Run as Administrator").
2. Open CRM, scan document and save it.
3. Next time you can launch IE in the common mode.



Solutions for information workers

Another problem

Ask for our support! Write to: support@websio.com

This Software uses:

1. *iTextSharp library v.4.1.6 (<http://sourceforge.net/projects/itextsharp/>) distributed under Lesser General Public License (LGPL) to convert images to PDF*
2. *Tesseract OCR engine library (<http://code.google.com/p/tesseract-ocr/>) distributed under Apache License 2.0 for Optical Character Recognition (OCR)*
3. *AForge.NET Framework published under LGPL v3 license.*

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