



FINBYZ TECH PVT LTD

“STEER YOUR VISION”

SMART CARD SCANNER

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Overview

The Smart Card Scanner captures business card details through a scan and extracts the information.

It then checks whether the contact already exists in the system.

If it does, the record is updated with the latest details.

If the contact is not found, the system looks for an associated lead or customer and either links the contact to an existing record or creates a new one. This ensures that contact information is always accurate, complete, and organized.

Purpose

- Guide limited access users through ERPNext contact creation
- Ensure compliance with system permissions and data standards
- Maintain data quality and consistency in ERPNext
- Provide clear steps for contact card management



Workflow Steps

1. Telegram Bot (Scan & Upload Business Card)

- User scans or uploads a business card using Telegram bot.
- Images are sent to the backend system.

2. AI Analysis – Extract Contact Information

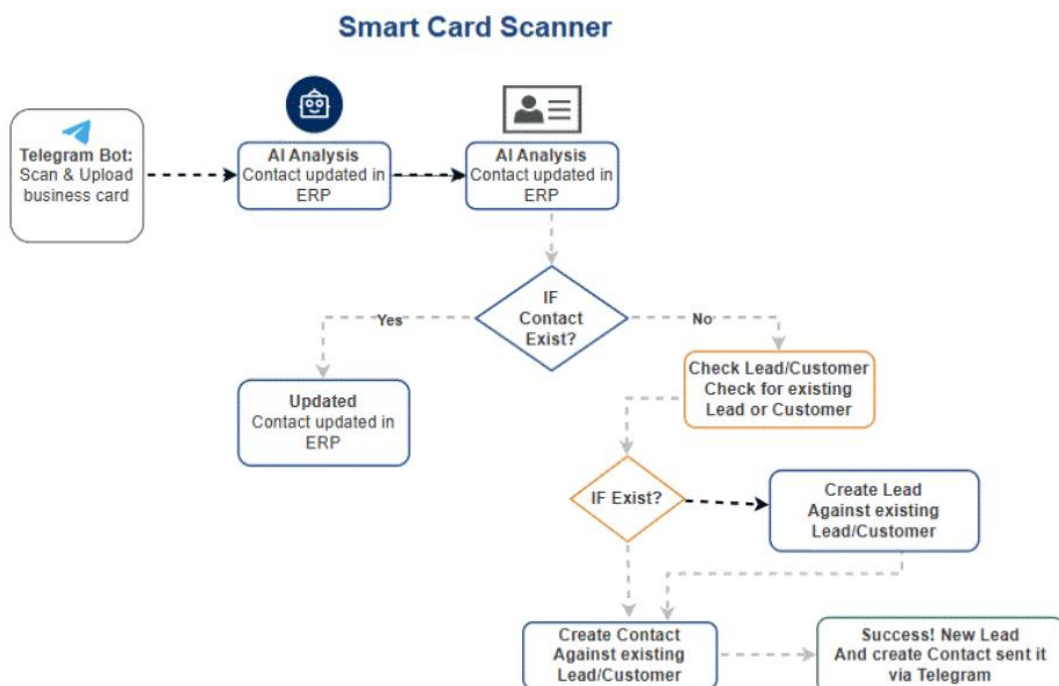
- AI extracts details from the card (Name, Email, Phone, Company, etc.).
- Data is updated into ERP for validation.

3. Check if Contact Already Exists in ERP

- The system verifies whether the contact is already present.
 - **If Yes:** Update Contact
 - **If No:** Check for Lead/Customer
 - **If Lead/Customer Exists:** Create Contact Against Lead/Customer
 - **If Lead/Customer Does Not Exist:** Create New Lead

4. Confirmation via Telegram

- Success messages are sent back to the user on Telegram.
- Message confirms creation of new Lead/Contact with extracted details



Benefits:

- **Time Saving** – No need to manually enter business card details into ERP; AI + Telegram bot does it instantly.
- **Error Reduction** – Eliminates manual typing mistakes when recording names, numbers, and emails.
- **Faster Lead Creation** – Leads and contacts are created in real-time, ensuring quick follow-ups.
- **24x7 Automation** – Works anytime via Telegram bot, even outside office hours.
- **Improved Data Accuracy** – Duplicate checking avoids repeated contacts and keeps ERP clean.

