Interact for Salesforce Enterprise - Mobile

User Guide

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Table of Contents

Documentation Notice 2
What is Interact for Salesforce Enterprise? 4
Log in to Interact Viewer 4
View a document 4
Capture a file 4
View document properties 5
Download a page 6
Display thumbnails 6
Use zoom 6
Rotate a page 7
Print a document 7
Reorder a page 7
Delete a page 7
What is an annotation? 8
Add comment to a sticky note annotation 8
Add a highlight annotation 8
Add a sticky note annotation 9
Delete an annotation 9
Move an annotation 10
Move a highlight annotation 10
Resize a highlight annotation 10
Select a highlight annotation color 10
Shortcut keys for highlight annotations 11
What is a form? 11
What is a presentation? 11
View a form as a stand-alone document 11
View a form as supplemental information for a document 12
Save a form as a stand-alone document 12
Save a form as supplemental information for a document 12
Reset a form 13

What is Interact for Salesforce Enterprise?

Perceptive Interact for Salesforce Enterprise offers you a web-based solution that combines (missing or bad snippet) capabilities with the Salesforce portal.

This solution enables you to manage documents within Salesforce through Interact viewer and perform many of the key tasks that you can perform in the system, such as view, capture, and download a document.

Log in to Interact Viewer

To log in to Interact for Salesforce Enterprise, complete the following steps.

1. In the **User name** box, type your user name.
2. In the **Password** box, type your password.
3. Click **Connect**.

> **Note:** If Single sign-on (SSO) is configured, you can directly view the document grid page without logging in.

View a document

To view a document in Interact viewer, complete the following steps.

1. In the display list, click the document you want to view.
2. To navigate back and forth between multiple pages, click the and icons.
3. To go to a specific page of a document, type the page number in the **Current Page** box and press ENTER.
4. To open another document from the same view, click the icon.

> **Note:** If you open a document in a new window, the icon does not appear. In restricted mode, you cannot open a document in a new window and in the document viewer, the icon appears. You can rotate, zoom, adjust the width and height of your document, but you cannot save the changes to your document in the restricted mode.

Capture a file

You can capture a file and add it as a document to Perceptive Content. When you capture a file, this process creates a new Perceptive Content document with one or more pages. To capture a file, complete the following steps.

1. In the Interact viewer, select **Select file** and complete one of the following procedures.

- Capture an audio file using audio recorder.
- Capture a photo or video file.
- Select an existing file to capture.

2. In the **Capture Document** window, under **Document Properties**, complete the following substeps.

   Note: You can modify the value of a document key, custom properties, drawer and document type, if the field is marked as user modifiable and is mapped to any dictionary in the **External User Application Plan Designer** or the field is mapped to dictionary and the Salesforce admin maps it to prompt. A dictionary is user modifiable if all fields mapped to the dictionary element are marked user modifiable in the **External User Application Plan Designer**.

   1. Optional. In the **Name** box, the document name appears by default. You can modify the name of the file.
   2. Optional. In the **Drawer** list, the configured drawer name appears by default. You can modify the drawer if it is marked as user modifiable.
   3. You can view **Field1** to **Field5**. You can modify the **Field1** to **Field5**values, if Salesforce admin configures them as user modifiable.
   4. Optional. In the **Type** list, the configured type name appears by default. You can modify the document type if it is marked as user modifiable.
3. In the **Capture Document** window, under **Custom Properties**, a list appears containing the custom properties which are modifiable, if they are marked as user modifiable by the Salesforce admin.
4. In the **Capture Document** window, under **Chatter**, complete the following substeps.
   1. In the **@mention** box, type three letters of the name of the person who must receive the post capture chatter feed notification. A list of names matching with the search term appears.

      Note: Ensure that while entering the name in the **@mention** box, you do not enter #,%, & or+.

   2. Select the relevant name in the list.
   3. Optional. Type a message in the **Note** box.
5. Select **Submit**.

   Note: In restricted mode, during document capture, the **Capture Document** window does not display the capture properties.

View document properties

Document properties define information that is specific to a document. A document can have document properties, custom properties, and page properties. To view the properties of a document, complete the following steps.

1. Open the document.
2. In the viewer, select to show or hide the document, custom, and page properties.

Download a page

To download a page in its original format from the viewer, complete the following steps.

1. Navigate to the page you want to download.
2. Select .

   You can download only the current page. The file name of the page downloaded is its page ID.

Display thumbnails

When you open a document in the viewer, the thumbnails pane displays the number of pages the document contains. To display thumbnails, complete the following steps.

1. In the viewer, select .
2. Optional. In the thumbnails pane, select a thumbnail to view the page and its properties.

Use zoom

You can zoom in or out of a page in any document with the exception of TXT and other file types, whose pages are not displayed in the viewer. You can view unsupported file formats such as DOC, EXCEL, PPT, and PDF, based on the Perceptive File Conversion Service specifications set by the administrator. To use zoom functionality in the viewer, complete the following steps.

1. Navigate to the page you want to view.
2. On the toolbar, perform any of the following actions.
   - To zoom out, drag the zoom slider to the left or select .
   - To zoom in, drag the zoom slider to the right or select .
   - To adjust the page to the width of the pane, select .
   - To adjust the page to the height of the pane, select .
   - To find optimal fit, select .
   - To view the original size of the image, select .
   - To use the lasso zoom feature, press CTRL and select the area you want to magnify. This feature magnifies the selected area of a page and enhances the image size to fit the screen.

Note: If you reduce the size of the window so that the slider does not appear, select the zoom drop-down and then select the zoom slider or an available size option.

Rotate a page

You can rotate common image formats such as BMP, GIF, JPG, PNG, and TIFF. You can rotate other file types if individual browsers support them. For a multiple page TIFF document, you can only rotate the current page. To rotate a page, in the viewer, complete the following steps.

1. Perform any of the following actions.
   - To rotate the page 90 degrees to the right, select .
   - To rotate the page 90 degrees to the left, select .
2. Optional. To save the document, select .
   You can save page rotations only in the TIFF format.

Print a document

To print a document in the viewer, complete the following steps.

1. Navigate to the document you want to print.
2. Select .

   Note: The system prints all the pages or sub pages within a document by default.

Reorder a page

You can reorder the pages in the thumbnails pane of the viewer. To reorder a page, complete the following steps.

1. In the thumbnails pane, select the page you want to move. You can select multiple pages.
2. Drag and drop the selected page to the new location.

   Note: If you select multiple pages, the pages are placed in the order you select them.

3. To save the changes you made to the document, select .

Delete a page

You can delete one or more pages from the viewer. To delete a page, complete the following steps.

1. In the thumbnails pane, select the page you want to delete. You can select multiple pages.
2. Select .
3. To save the changes you made to the document, select .

What is an annotation?

An annotation is a graphic that you can add anywhere on an image in Perceptive Experience to show markups or comments without affecting the original image.

For example, you can express the need for review of content by highlighting areas of an image or adding a sticky note to that image. In Perceptive Experience you can add annotations on BMP, GIF, JPG, PNG and TIFF file types.

Each annotation requires an annotation template that is created and customized for any supported annotation type. Contact your administrator if you need new annotation templates.

> Your administrator can create a Sound Approval template based upon the sticky note type with the text: Approval by sound technicians. Users within the Sound and Lighting group can view the sticky note annotation and add text that is kept in the note history.

Security options are also available based on the annotation template. Your administrator can set the template security so that only users in a particular group can use, modify, or delete annotations created using a template.

> Your administrator can set the template security so that only users in the Sound and Lighting group can use, modify, or delete annotations created using that Sound Approval template. If your administrator does not grant users in the Human Resources access to view sticky notes created using that Sound Approval sticky note template, those users cannot view, modify, or delete this annotation.

Add comment to a sticky note annotation

Sticky note text cannot be changed after the initial annotation creation. You can add text to a sticky note and the text is saved in the note history. To append text to a sticky note annotation, complete the following steps.

1. Select the sticky note annotation to which you want to add text.
2. Select the edit icon.
3. In the **Add Comment** box, type your text and select **Add**.
4. Select **Close**.
5. Select the **Save Document** icon to ensure the annotation is saved to the item.

Add a highlight annotation

The highlight annotation allows you to highlight an area on an item image. To add a highlight annotation, complete the following steps.

Prerequisite You must have the Annotation Template > Create privilege for the associated annotation template.

1. In the viewer, select and then select **Create Annotation**.

2. Select the area of the item image where you want to add the highlight.
3. From the **Annotation Type** list, select **Highlight**.
4. From the **Annotation Template** list, select a highlight annotation template.
5. Select the **Add** button and apply the annotation.
6. To ensure the annotation is saved to the item, select the **Save Document** icon.

Add a sticky note annotation

The sticky note annotation lets you add small notes to images. To add and populate a sticky note annotation, complete the following steps. After you populate sticky note text, you cannot change the text, but you can append additional information to the same sticky note annotation.

Prerequisite This procedure requires that you have the Create privilege for the associated annotation template.

1. In the viewer, select and then **Create Annotation**.
2. Select the area of the image where you want to add the annotation.
3. Select the **Annotation Type** and the **Annotation Template** you want to apply.
4. Select **Add** to accept placement of the annotation.
5. In the **Sticky Note** dialog box, type your text and select **Add**.

   Note: If you do not add any text during creation of the sticky note annotation, the annotation representation is removed from the image.

6. Select **Close**.
7. To ensure the annotation is saved to the item, select the **Save Document** icon.

Delete an annotation

To delete an annotation, complete the following steps.

Prerequisite You must have the **Annotation Template > View** privilege and the **Annotation Template > Delete** privilege for the associated annotation template.

1. Select an annotation.
2. Select the **Delete**button.
3. To ensure the annotation is deleted from the item, select the **Save Document** icon.

Move an annotation

To move an annotation, complete the following steps.

Prerequisite You must have the **Annotation Template > View** privilege and the **Annotation Template > Modify** privilege for the associated annotation template.

1. Select the annotation, and drag it to a new location.
2. To ensure the annotation is moved, select the **Save Document** icon.

Move a highlight annotation

To move a highlight annotation, complete the following steps.

1. Select a highlight annotation and drag it to a new location.
2. To ensure the annotation is moved, select the **Save Document** icon.

Resize a highlight annotation

To resize a highlight annotation, complete the following steps.

Prerequisite You must have the Annotation Template > View privilege and the Annotation Template > Modify privilege for the associated annotation template.

1. Select the highlight annotation you want to resize.
2. Drag the edges or corners to resize the annotation to the desired size.
3. To ensure the annotation is resized, select the **Save Document**icon.

Select a highlight annotation color

To select a new highlight annotation color, complete the following steps.

Prerequisite You must have the **Annotation Template > View** privilege and the **Annotation Template > Modify** privilege for the associated annotation template.

1. Select a highlight annotation.
2. Select the **Edit**icon.
3. Under **Fill Color**, select the color indicator.
4. In the **Color** dialog box, select a color.
5. To ensure the annotation color is saved, select the **Save Document** icon.

Shortcut keys for highlight annotations

To modify a highlight annotation, you must have the Annotation Template > View privilege and the Annotation Template > Modify privilege for the associated annotation template. You can modify a selected highlight annotation with the following shortcut keys.

Shortcut	Description
Arrow keys	Move in the desired direction
SHIFT + Arrow keys	Resize in the desired direction

What is a form?

Forms are an optional component of Perceptive Content. Forms are available if your administrator configures them for your use. You administrator specifies which forms are available, including any workflow queues to which they are associated. Depending on your system configuration, you may use the following types of forms.

A form displayed as a stand-alone document

When you open a document, a form appears in the viewer. Depending on your system configuration, each field can map to a corresponding custom property. After you fill in the fields and save the form, the system can automatically populate the values for the corresponding custom properties.

A form displayed as supplemental information for a document

This type of form allows you to capture additional data for your documents. When you open a document, such forms appear in the forms pane. You can select from the available forms and fill in the fields to provide additional information about a document.

What is a presentation?

A presentation represents a view of the form data based on the privileges defined by your administrator.

A form can have one or more presentations. Each presentation represents a different view of the form data. The first presentation of the form displays by default. You can select the presentation you want to view.

View a form as a stand-alone document

A stand-alone form appears in the viewer when you open a document. To view a form displayed as a stand-alone document, complete the following steps.

1. Open the document you want to view.

2. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   Note: If the form has only one presentation, the viewer displays that presentation.

View a form as supplemental information for a document

Forms that provide supplemental information associated with a document appear in the forms pane of the viewer. To view a form that displays as supplemental information for a document, complete the following steps.

1. Open the document you want to view.
2. To display the forms pane, select .
3. In the forms pane, from the drop-down list, select the form you want to view.
4. Optional. If the form has multiple presentations, from the drop-down list, select the presentation you want to view.

   Note: If the form has only one presentation, the forms pane displays that presentation.

5. Optional. If you need more space to view the form, resize the forms pane.

Save a form as a stand-alone document

A stand-alone form appears in the viewer when you open a document. To modify and save a form, complete the following steps.

1. Open the document you want to modify.
2. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
3. Modify the information in the form.
4. Select .

Save a form as supplemental information for a document

Forms that provide supplemental information associated with a document appear in the forms pane of the viewer. To modify and save a form that displays supplemental information, complete the following steps.

1. Open the document you want to modify.
2. To display the forms pane, select .

3. In the forms pane, from the drop-down list, select the form you want to modify.
4. Optional. If there are multiple presentations, from the drop-down list, select the required presentation.
5. Modify the information in the form.
6. Select .

Reset a form

Before you save a form, you can reset the form to display the last saved data of that form. To clear the data in a form and revert to the last saved data, complete the following steps.

1. In the forms pane, select .
2. Select **Reset**.