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# 1 INTRODUCTION

CamCard Business is a business card scanning solution for enterprises and SMEs. It boosts productivity by cutting data-entry time and centralizing customer management. Before using, please read the user manual for super admin to understand all the manage functions of CamCard Business.

## 2 PERMISSION STATEMENT

### 2.1 Private Card Holder

Cards added by CamCard personal version will be saved into Private Card Holder. Cards added by CamCard Business will be saved into both Private Card Holder and Company Card Holder automatically. Every user has his or her own Private Card Holder, which cannot be viewed by admins and superiors. However, the users can copy their cards to the Company Card Holder as needed.

### 2.2 Roles

There are four roles in CamCard Business, each role has different rights.

- **Super Admin:** Any functionality is open for super admin. With the right to access CamCard Business via both web app and mobile app, super admin can view, share and edit any cards in the Company Card Holder, and is able to manage the users' accounts, the company account and the company settings.

- **Admin:** Admins can manage the company account, the users' accounts and the company settings (only available on the web app), while have no rights to manage or share any cards in the Company Card Holder.
- **Standard User:** Standard users are not able to modify company settings, while have the rights to view, share, edit and manage part of the cards in the Company Card Holder, including cards added by themselves, cards added by their subordinates and cards shared with them or with their departments.
- **Read-only-permission User:** This role can view all cards in the Company Card Holder, but cannot edit or manage any of the cards.

## 2.3 Role-based Access

Super Admin can set superior for every staff. The superior can view, edit and delete any of the cards added by his or her subordinates in the Company Card Holder.

## 2.4 Share

Users can share cards with colleagues or other departments from the Company Card Holder. Shared cards can be viewed but cannot be edited or deleted.

## 2.5 Share All Cards Company-wide

Once this feature is enabled by the super admin, all users of the company account can view and search all the cards in the Company Card Holder.

# 3 GET STARTED

Only with some simple steps you can finish the preparation and start using CamCard Business.

## 3.1 Create a Company Account

Please visit CamCard Business official website at [b.camcard.com](https://b.camcard.com) and click “GET STARTED” to enter the page below:

### 3.1.1 New to CamCard

If you have never registered a CamCard account, please enter the required information on the page showed in 3.1 to get a company account activation email.

After activating, the company account will be created. As the creator, you will be the super admin of your company, and need to use this account to sign into CamCard Business.

**CAMCARD BUSINESS** Price Sign in

### Start 10-Day Free Trial

- Manage Company Cards**  
View subordinates' contacts and manage information company-wide
- Role-based Access**  
Set role for each user to access to the master database securely.
- Accurate Recognition**  
Quickly enter business cards to sales people's smartphone and company database, generating highly accurate information.
- Export to CRM or Excel**  
Easily export contacts to Salesforce, SugarCRM or save as Excel files.

### Create Account

A new CamCard Business account will be created. If you already have a CamCard account, please sign in to become company admin

Email

Password(at least 6 characters)

[Create Company Admin Account](#)

By creating account, you agree to our [Terms of Service](#) and [Privacy Policy](#).

### 3.1.2 CamCard User

If you have already been a CamCard user, please click Sign in with CamCard account at the top of the page. Then enter your CamCard account and password to sign in.

After signing in, enter your name and the company name to create a company account.

Your account will be the super admin of your company, you can use this account to sign in to both CamCard private app and CamCard Business. Your original cards in this account will be saved into your Private Card Holder, and you can copy any of the cards to your Company Card Holder as needed.

The screenshot shows the CamCard Business interface. At the top left is the CamCard logo and 'BUSINESS' label. At the top right are 'Price' and 'Sign in' links. The main content is divided into two columns. The left column is titled 'Start 10-Day Free Trial' and lists four features: 'Manage Company Cards' (View subordinates' contacts and manage information company-wide), 'Role-based Access' (Set role for each user to access to the master database securely), 'Accurate Recognition' (Quickly enter business cards to sales people's smartphone and company database, generating highly accurate information), and 'Export to CRM or Excel' (Easily export contacts to Salesforce, SugarCRM or save as Excel files). The right column is titled 'Create Account' and contains a text box with the instruction: 'A new CamCard Business account will be created. If you already have a CamCard account, please sign in to become company admin'. Below this are input fields for 'Email' and 'Password(at least 6 characters)', a blue 'Create Company Admin Account' button, and a link to 'Terms of Service and Privacy Policy'.

### 3.2 3.2 Invite Colleagues

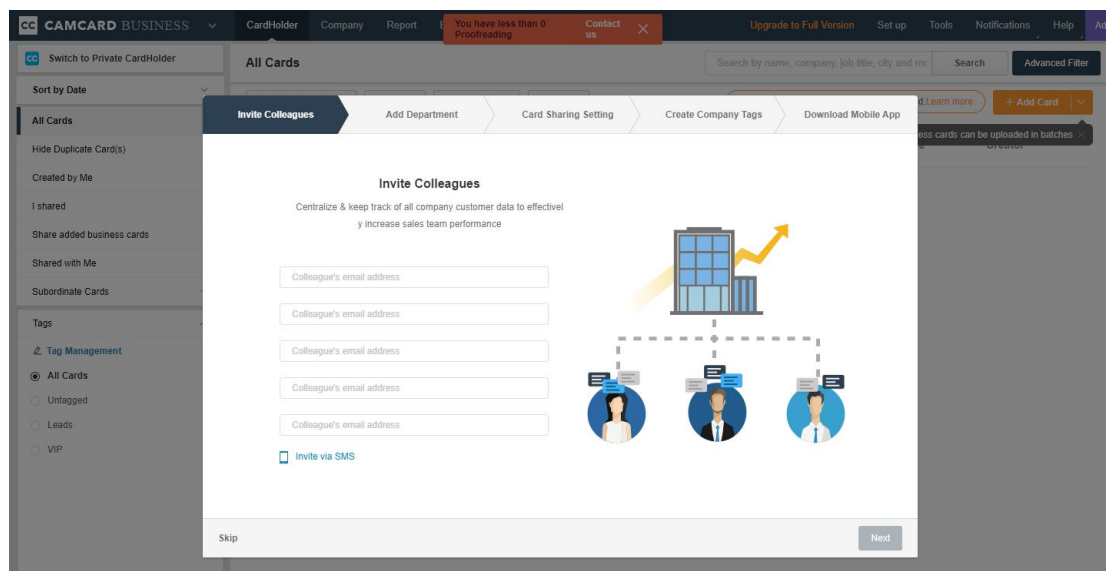
As the super admin of your company, you need to invite colleagues to join the company to centralize the card management.

A popup window will appear to remind you to invite colleague when you first

visit [b.camcard.com](https://b.camcard.com).

Enter the colleagues' email addresses and the invitation email will be sent. All the colleagues will receive the invitation email and by following the prompts in the email, each of them will create an account and join the company.

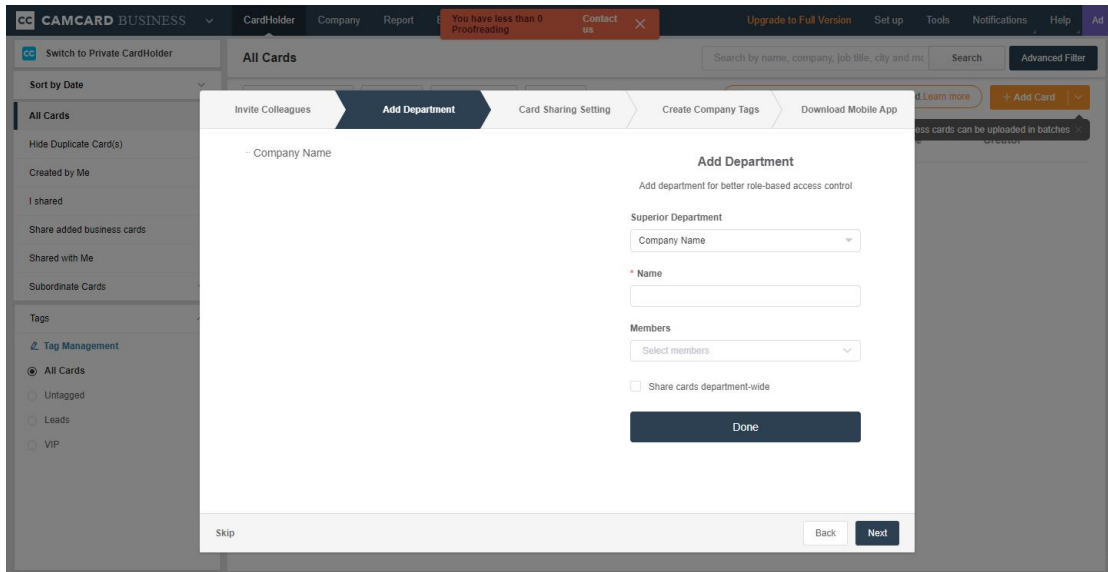
If the colleague has already been a CamCard user, after receiving your invitation, he or she can use the CamCard account to sign in directly to CamCard Business and join the company. His or her original cards will be saved in the Private CardHolder and can be copied to the Company Card Holder as required.



Super admin can also invite colleagues constantly on the settings page ( For more information, please refer to 4.3 Manage Users ) .

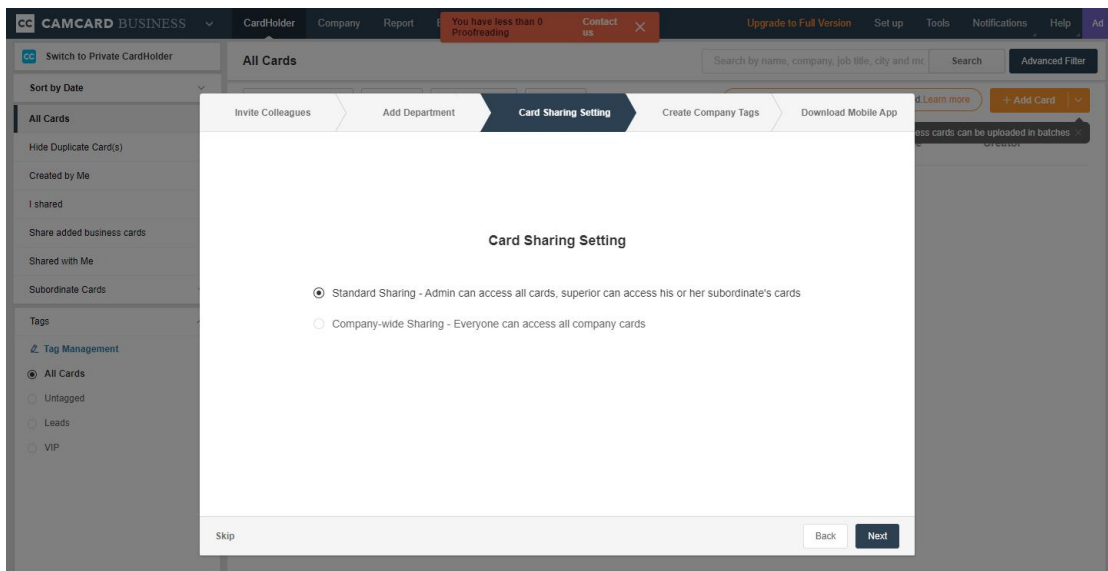
### 3.3 Department Settings

After inviting colleagues, click next to add departments. A complete construction of departments can boost productivity by helping better manage role-based access and card sharing rules.



### 3.4 Company-wide Sharing

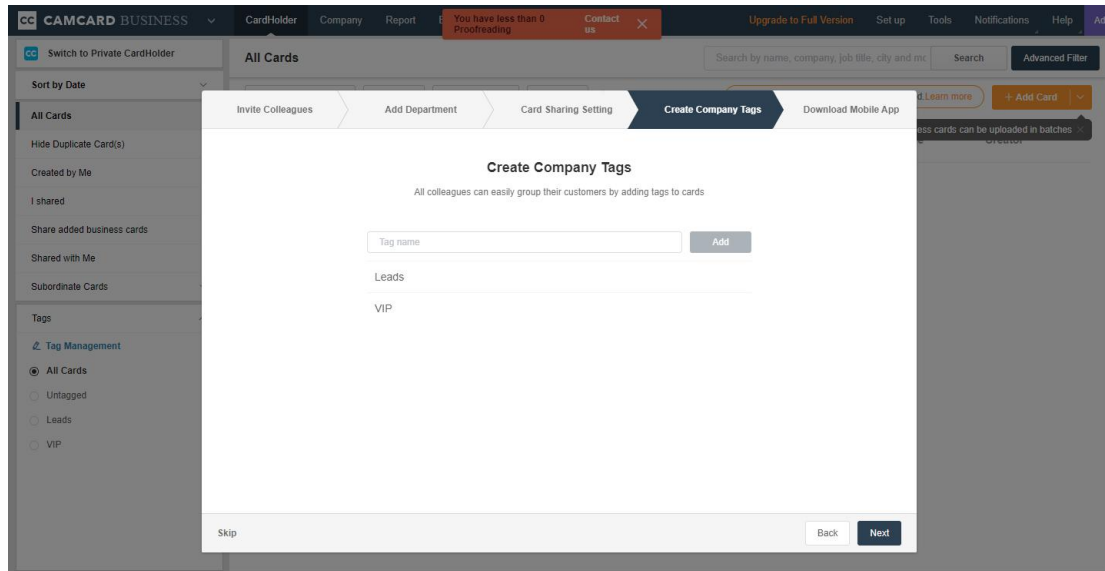
Company-wide sharing: On - All users of the company account can view and search the cards in the Company CardHolder. Off - Users can only view parts of the cards in the Company CardHolder based on the permissions.





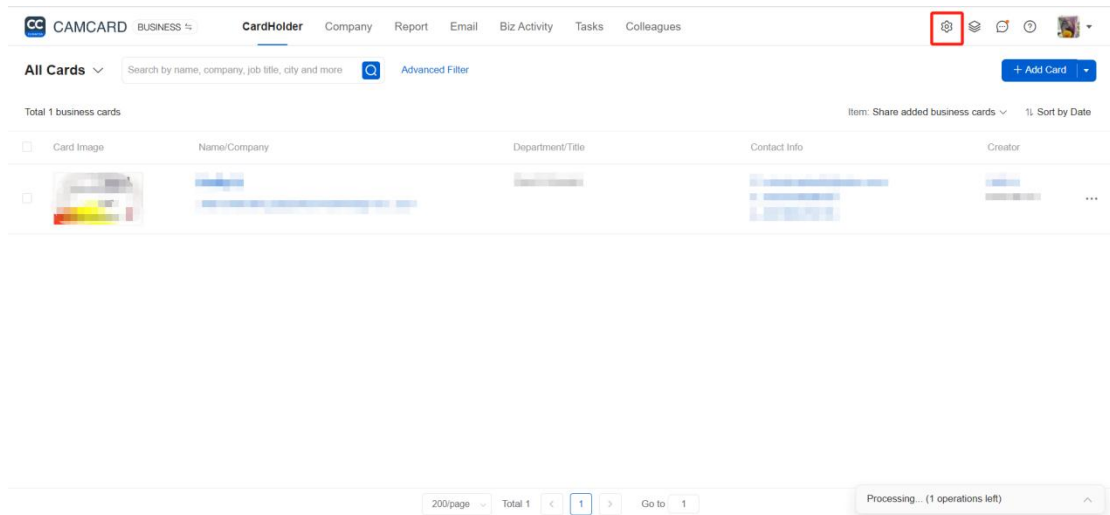
### 3.5 Add Company Tags

Adding company tags can help categorize and manage cards more easily. After adding tags, click next to complete the basic settings.



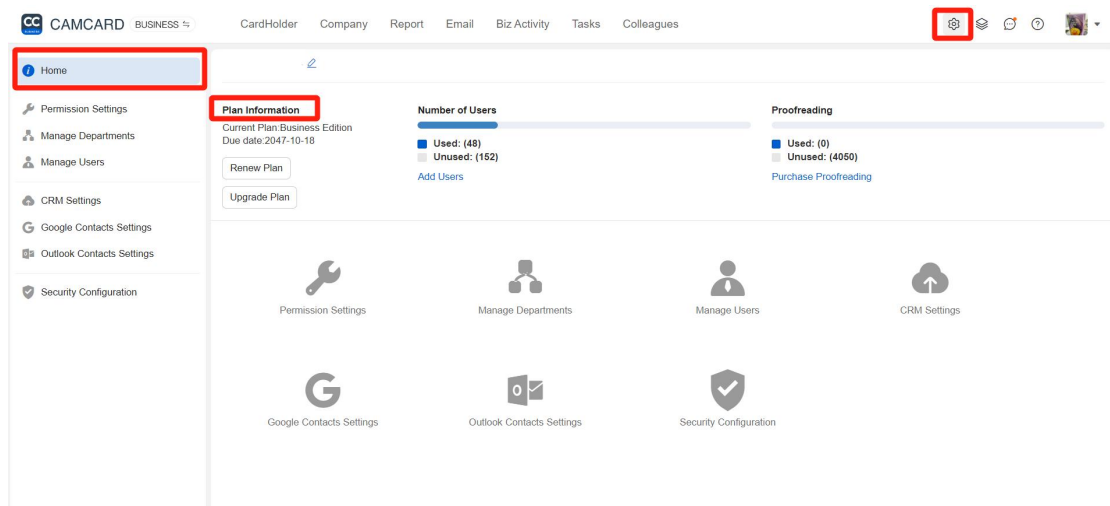
## 4 ADMIN FUNCTIONS

Only the company admin can manage the permission settings. To start managing, please visit [b.camcard.com](https://b.camcard.com) and sign into CamCard Business with the company admin account. After signing in, click the gear icon in the upper-right to enter the settings page.



## 4.1 Account Information

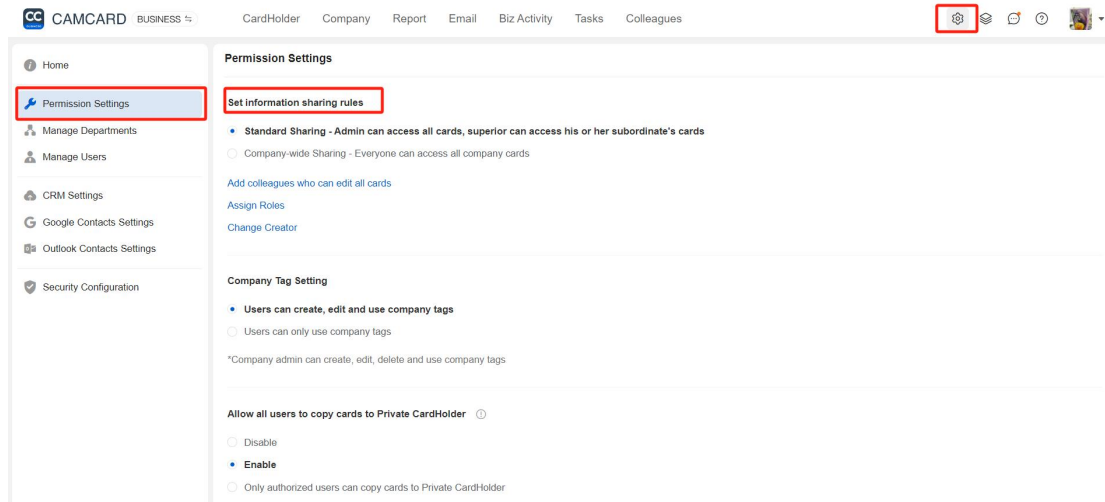
On the settings page, by clicking the Account Information you can view the current account status including the plan information, the number of users and the quota of proofreading.



## 4.2 Sharing Settings

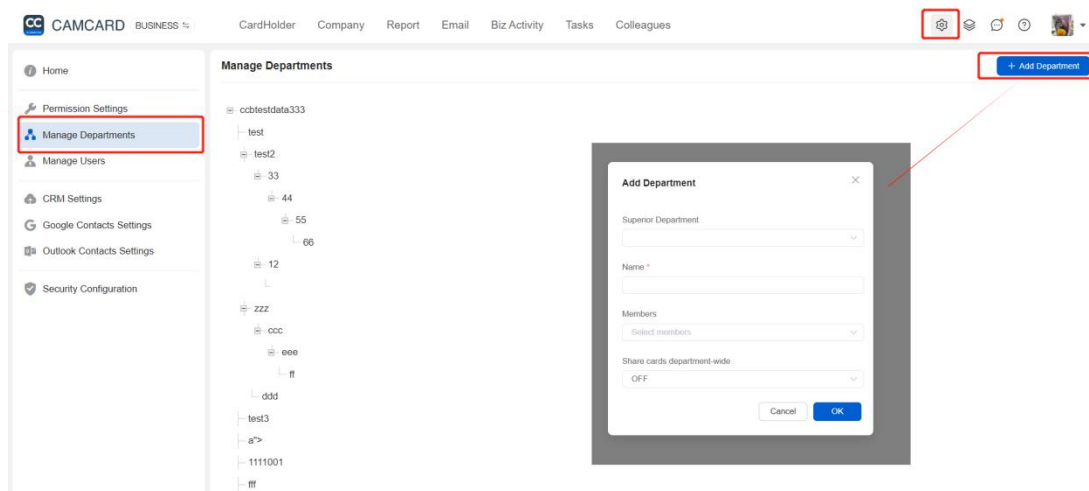
On the settings page, click “Sharing Settings” on the left side to set the card sharing rules. Through “Set Roles” and “Manage Admin Roles” you can manage

more details about the card sharing rules.



## 4.3 Manage Departments

On the settings page, you can click “Manage Departments” on the left side to add and edit any departments based on your company structure. Hover over an existing department name to edit it.



CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home | Manage Departments | Manage Users | CRM Settings | Google Contacts Settings | Outlook Contacts Settings | Security Configuration

### Manage Departments

+ Add Department

- ccbtestdata333
  - test
    - test2
      - 33
        - 44
          - 55 **Add Sub-department** **Change** **Delete**
          - 66
  - 12
  - zzz
    - ccc
      - eee
        - ff
    - ddd
  - test3
  - a>
  - 1111001
  - fff

CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home | Manage Departments | Manage Users | CRM Settings | Google Contacts Settings | Outlook Contacts Settings | Security Configuration

### Manage Departments

+ Add Department

**Add Sub-department**

- Superior Department: 33
- Name \*
- Members: Select members
- Share cards department-wide: ON

Cancel OK

- ccbtestdata333
  - test
    - test2
      - 33
        - 44
          - 55
          - 66
  - 12
  - 测试分享
  - zzz
    - ccc
      - eee
        - ff
    - ddd
  - test3
  - a>
  - 1111001

CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home | Manage Departments | Manage Users | CRM Settings | Google Contacts Settings | Outlook Contacts Settings | Security Configuration

### Manage Departments

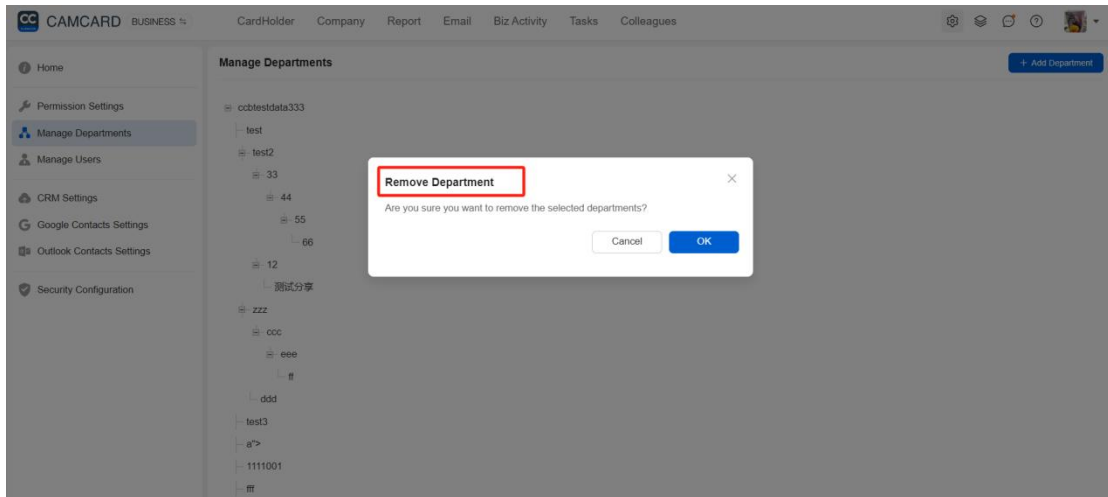
+ Add Department

**Edit Department**

- Superior Department: 44
- Name \*: 55
- Members: Select members
- Share cards department-wide: ON

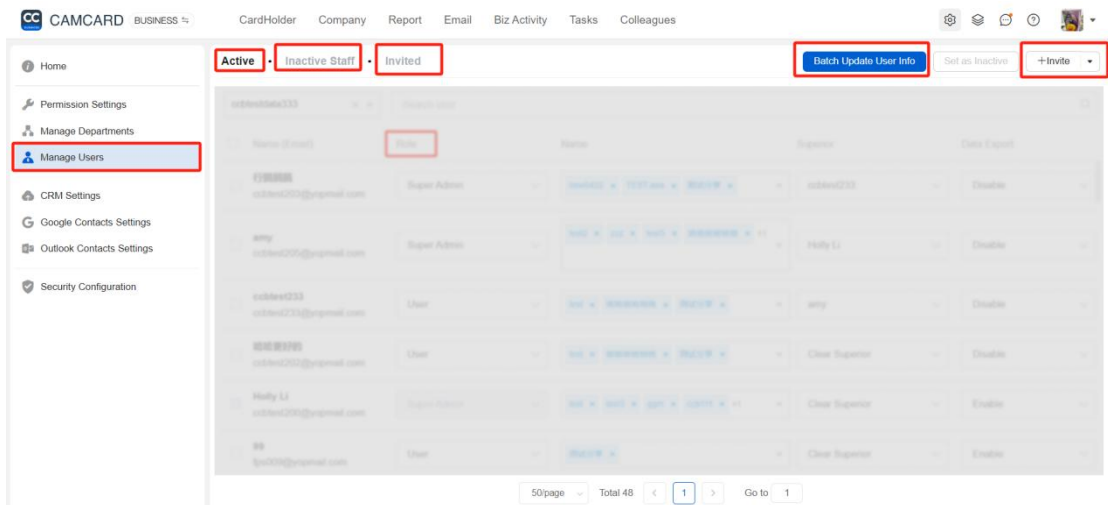
Cancel OK

- ccbtestdata333
  - test
    - test2
      - 33
        - 44
        - 55
        - 66
  - 12
  - 测试分享
  - zzz
    - ccc
      - eee
        - ff
    - ddd
  - test3
  - a>
  - 1111001
  - fff



## 4.4 Manage Users

By managing users, you can invite staffs, set staffs as active or inactive, set superiors, departments and permissions for users. For more information about the superior settings and role-based access, please refer to the Permission Statement.



### 4.4.1 Active Staff

- Set superior: The superior can access any of the cards added by his or her subordinates in the Company Card Holder
- Set any staff as an admin: Admins have part of the rights to manage the

company account (refer to the Permission Statement)

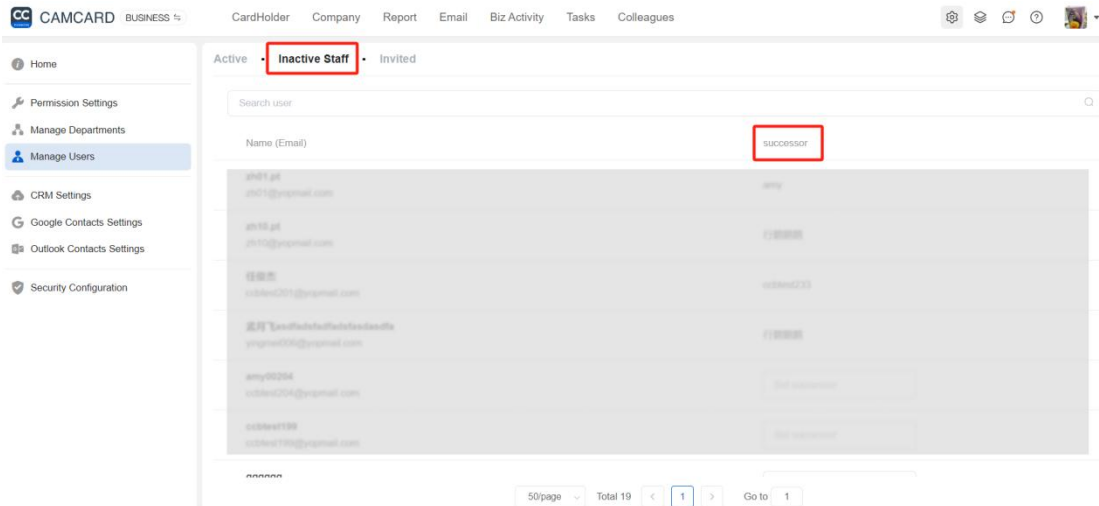
- Set permissions for exporting cards: Super admin can allow or not allow any staff to export cards as Excel file.
- Set as inactive staff: An inactive staff cannot sign in to CamCard Business or access any cards in the Company Card Holder. However, cards added in the company Card Holder by this staff are still accessible to other users. Meanwhile, the inactive staff is free to use the CamCard personal version and access all cards in his or her private Card Holder

#### **4.4.2 Inactive Staff**

Once a user is set as inactive staff, he or she cannot sign in to CamCard Business, while the data added by this user will be kept in the company account.

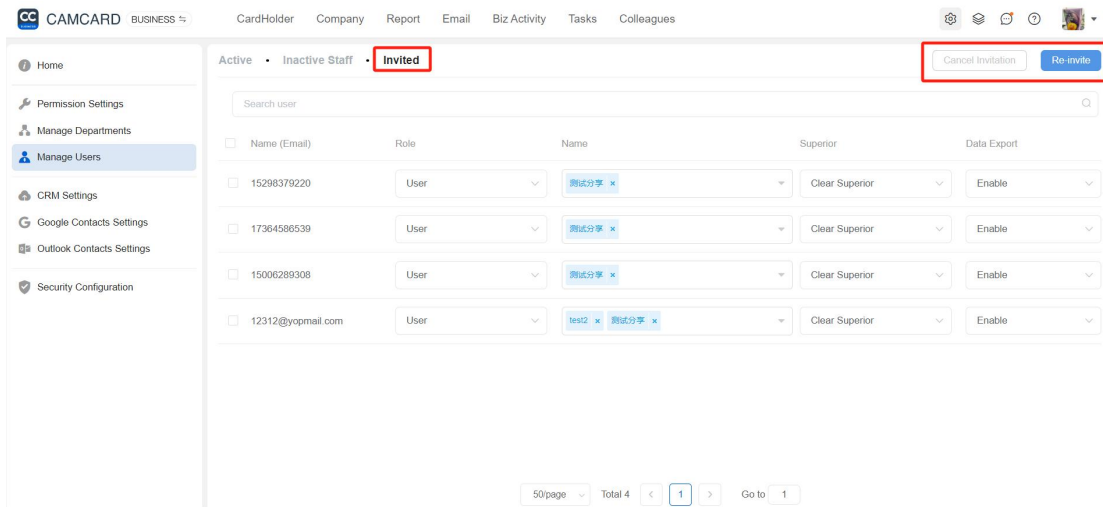
You can view all the inactive staffs on this page and set successors for them.

The successor has access to all cards created by his or her predecessor in the company Card Holder.[Please note: Once set, the successor cannot be modified.]



### 4.4.3 Invited Colleagues

You can view those users who have been invited but not join yet. You can resend the invitation or cancel the invitation as needed.



### 4.4.4 Update employees in bulk

Support bulk update of employees via excel templates.

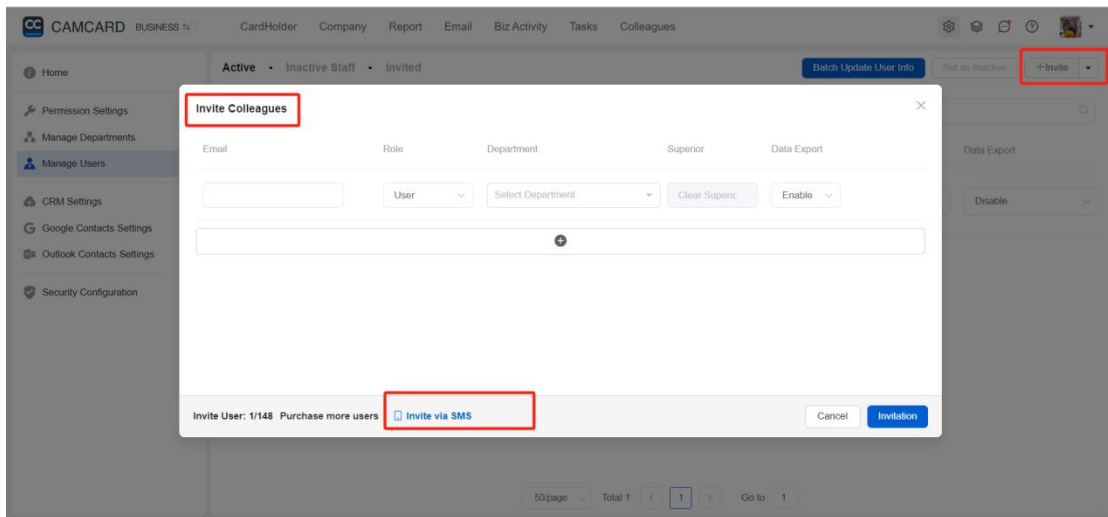
The screenshot shows the CAMCARD BUSINESS 'Manage Users' interface. The left sidebar contains navigation options: Home, Permission Settings, Manage Departments, Manage Users (highlighted), CRM Settings, Google Contacts Settings, Outlook Contacts Settings, and Security Configuration. The main content area is titled 'Active' and includes tabs for 'Inactive Staff' and 'Invited'. A search bar contains 'zzz'. A table lists users with columns for Name (Email), Role, Name, Superior, and Data Export. A 'Batch Update User Info' button is highlighted in red. A '+Invite' dropdown menu is also highlighted in red. At the bottom, there is a pagination control showing '50/page', 'Total 1', and 'Go to 1'.

The screenshot shows the 'Batch Update User Info' workflow. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Batch Update User Info' and includes a 'Back to Manage Users' button. The workflow consists of three steps: Step 1: 'Download Excel of current user list' with a green Excel icon; Step 2: 'Open the form you downloaded in step 1, modify the information as needed. Please do not change any of the column headings.'; Step 3: 'Click "Import" to import the form you modified in step 2.' An 'Import' button is highlighted in red.

#### 4.4.5 Invite colleagues

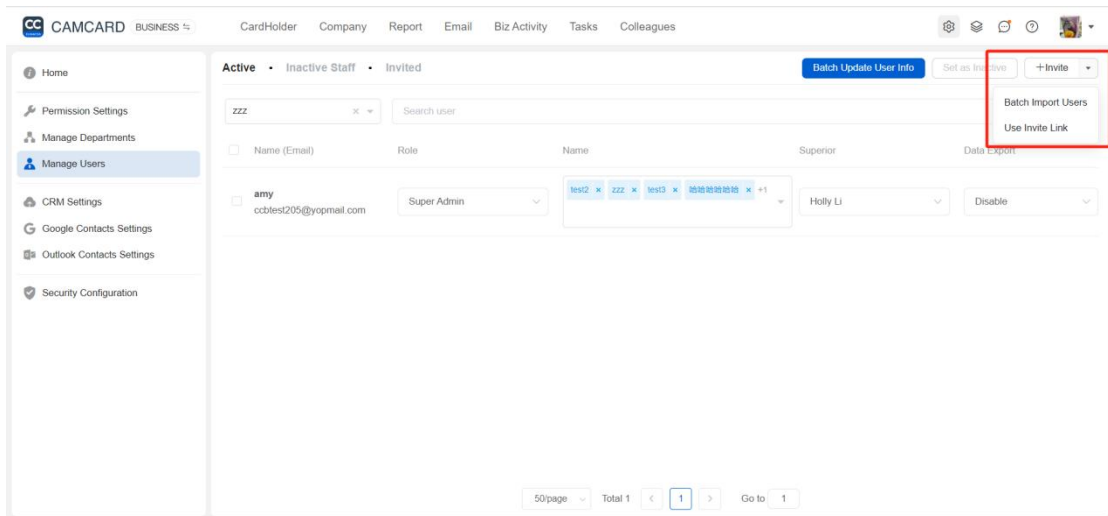
In daily work, enter the mobile phone email address of a colleague to invite.

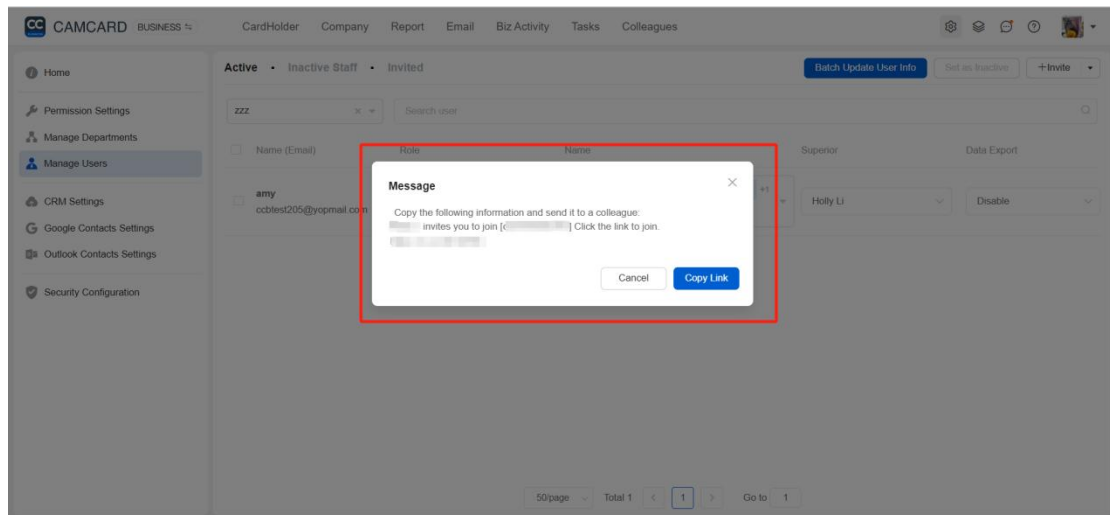




#### 4.4.6 Other ways to invite colleagues

You can import employees in bulk through Excel templates or invite employees through links.





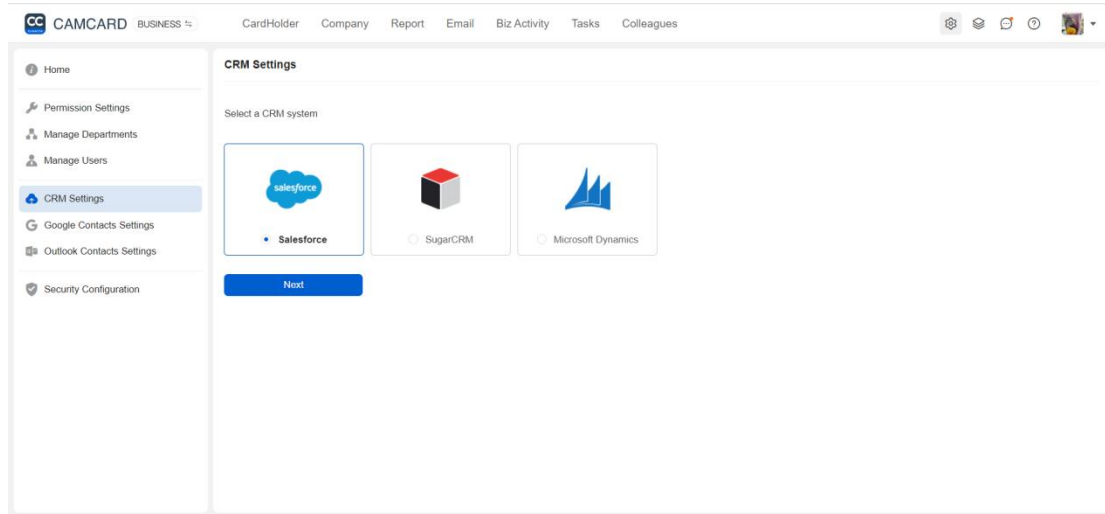
## 4.5 CRM Settings

If your company has been using Salesforce or Sugar CRM or Microsoft Dynamics, then you can use this feature to export cards into the CRM system as “leads” .

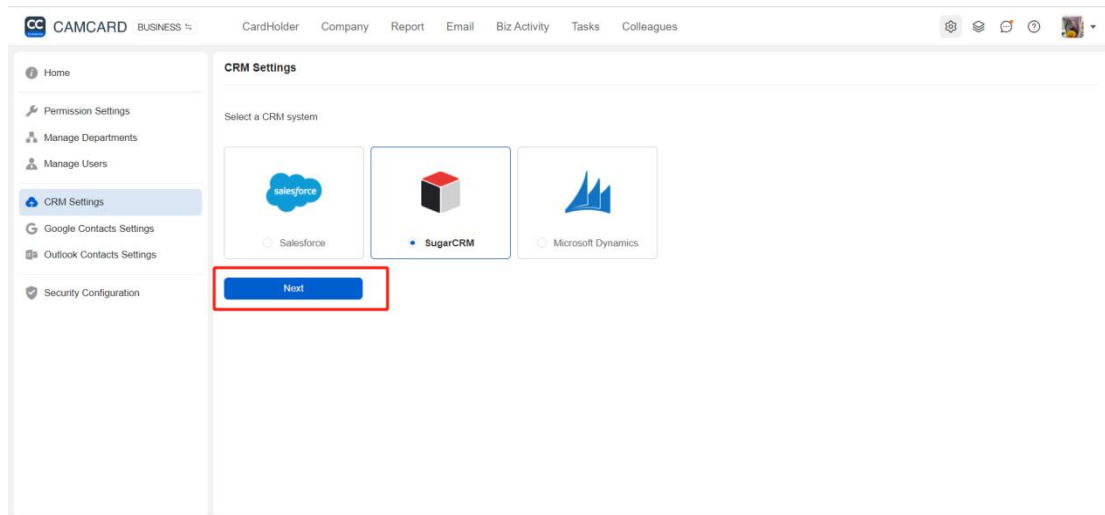
Every time when users choose to export cards to CRM, all newly added cards will be saved to the CRM and all updated cards will also be synced to the CRM.

[Please note: Cards can only be exported to the CRM system manually.]

## 4.5.1 Sales force



## 4.5.2 SugarCRM



CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home

CRM Settings

Configure SugarCRM

Server Address

How to get server address?

Step 1: sign in with admin account

Step 2: click the Profile drop-down menu at the top-right corner, and select admin

Step 3: select Advanced -> User Settings -> URL

Configuration completed

### 4.5.3 Microsoft Dynamics

CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home

CRM Settings

Select a CRM system

Salesforce

SugarCRM

Microsoft Dynamics

Next

CAMCARD BUSINESS | CardHolder Company Report Email Biz Activity Tasks Colleagues

Home

CRM Settings

Microsoft Dynamics Configuration

Server Address

How to get server address?

Step 1: sign in with admin account  
https://portal.office.com/adminportal/homes/homepage

Step 2: Click "CRM" button in the submenu of "Admin"

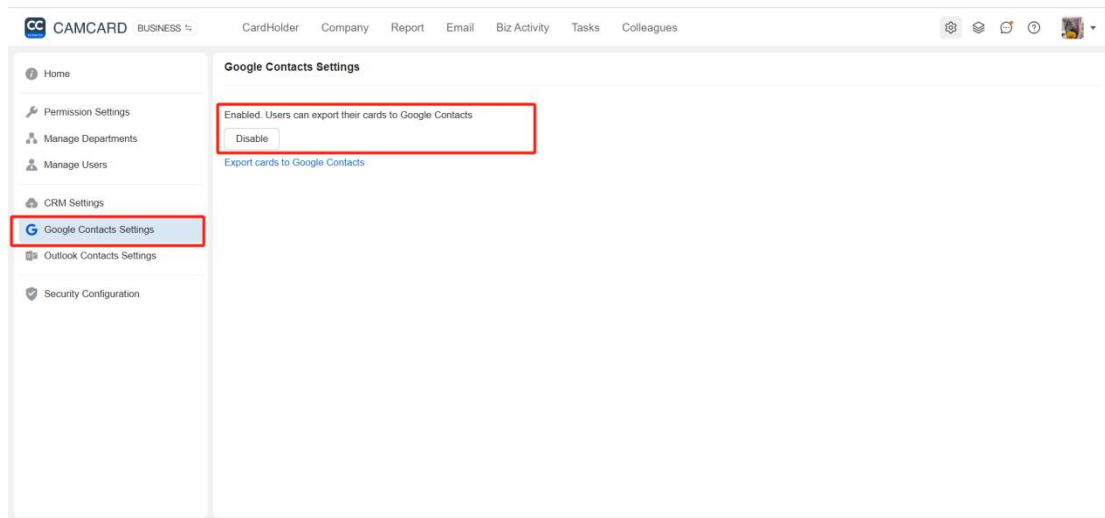
Step 3: Click "Edit" button

Step 4: Check the URL

Configuration completed

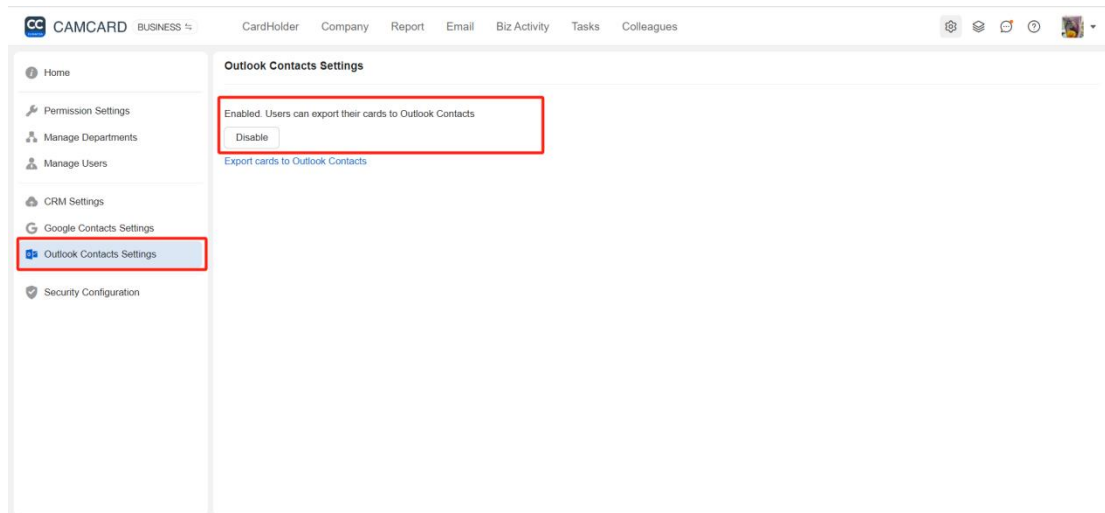
## 4.6 Google Contacts

On the Settings page – Google Contacts, enable the ability to allow employees to export their own business cards to Google Contacts, and click Close, employees will not be able to export.



## 4.7 Outlook

On the Settings page – Outlook Contacts, enable the ability to allow employees to export their own business cards to Google Contacts, and click Close, employees will not be able to export.



## 4.8 Security Configuration

On the Settings page – Security Settings, you can set the IP range and mobile device to access CamCard Enterprise Edition.

Administrators can view the information in CamCard Enterprise Edition by setting it within the company domain or specifying mobile devices to ensure the security of the relevant information in CamCard Enterprise Edition.

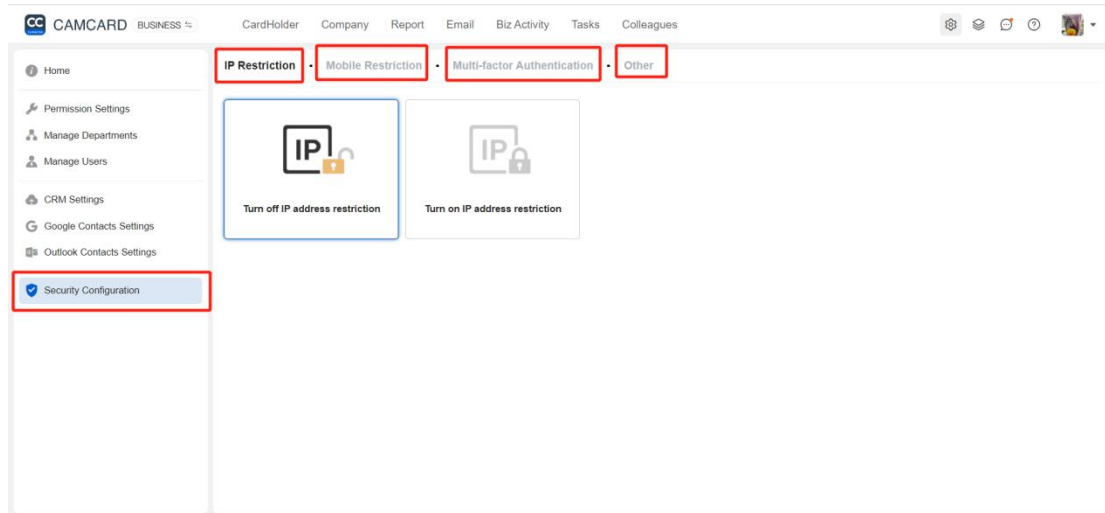
- IP restriction: only valid for b.camcard.com access via web pages.
- Mobile device restrictions are only valid for using CamCard Enterprise app through mobile phones.
- Multi-Authentication: Enforce multi-authentication login.

\*This function is only supported by CamCard Enterprise APP "iOS App (1.39.0),

Android App (1.34.0)" version or above

- Other settings: Force the mobile device passcode to be enabled.

\*This function only supports CamCard Enterprise APP version 1.9 or above



## 5 FURTHER QUESTIONS

If you have any further questions or suggestions, please contact us at

[vipsupport@intsig.com](mailto:vipsupport@intsig.com)