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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 manualfor super adminto understand all the manage functions of CamCard Business.

## 2 PERMISSIONSTATEMENT

#### 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 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.

			Price	Sign in
Start 1	0-Day Free Trial	Create Account		
	Manage Company Cards View subordinates' contacts and manage information company-wide	A new CamCard Business account will be created. If you already have a CamCard account, please sign in to become company admin Email		
	Role-based Access Set role for each user to access to the master database securely.	Password(at least 6 characters)		
RE	Accurate Recognition Quickly enter business cards to sales people's smartphone and company database, generating highly accurate information	Create Company Admin Account		
CRM	Export to CRM or Excel Easily export contacts to Salesforce, SugarCRM or save as Excel files.	By creating account, you agree to our Terms of Service and Privacy Policy.		

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#### 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.

	USINESS 与			Price	Sign in
S	Start 10-D	ay Free Trial	Create Account		
	×-0	Manage Company Cards View subordinates' contacts and manage information company-wide	A new CamCard Business account will be created. If you already have a CamCard account, please sign in to become company admin		
r.		Role-based Access Set role for each user to access to the master database securely.	Password(at least 6 characters)		
	\	Accurate Recognition Quickly enter business cards to sales people's smartphone and company database, generating highly accurate information	Create Company Admin Account By creating account, you agree to our Terms of Service and Privacy		
(	CRM	Export to CRM or Excel Easily export contacts to Salesforce, SugarCRM or save as Excel files.	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.

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.

CC CAMCARD BUSINESS V	CardHolder Company Report P You have less than 0 Contact X Upgrade to Full Version Set up Tools Notifications Help Ad
CC Switch to Private CardHolder	All Cards Search by name, company, job title, city and mc Search Advanced Filter
Sort by Date	HLasmmore) + Add Card
All Cards	Invite Colleagues Add Department Card Sharing Setting Create Company Tags Download Mobile App
Hide Duplicate Card(s)	ess carto de upreador in balches >
Created by Me	Invite Colleagues
I shared	Centralize & keep track of all company customer data to effective
Share added business cards	y increase sales team performance
Shared with Me	Colleague's email address
Subordinate Cards	Coneagues email adoress
Tags	Colleague's email address
🖉 Tag Management	Colleague's email address
All Cards	Colleague's email address
O Untagged	
O Leads	Colleague's email address
O VIP	Invite via SMS
s	kip Ned

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.

CC CAMCARD BUSINESS	CardHolder Company	Report F You have le Proofreadur	ess than 0 Contact	Vpgrade to Full Version	Set up Tools Notifications Help Ad
CC Switch to Private CardHolder	All Cards			Search by name, company, job t	tle, city and mc Search Advanced Filter
Sort by Date		1.6			d Learn more + Add Card v
All Cards	Invite Colleagues	Add Department	Card Sharing Setting	Create Company Tags Download M	
Hide Duplicate Card(s)	Company Name			(01222) %) %	ess carus car de uploaded in Darches X
Created by Me				Add Department Add department for better role-based access control	
I shared					
Share added business cards				Superior Department Company Name	
Shared with Me					
Subordinate Cards				* Name	
Tags				Members	
🖉 Tag Management				Select members	
All Cards					
O Untagged				Share cards department-wide	
O Leads				Done	
	Skip			Back	Next

# 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.

CC CAMCARD BUSINESS	CardHolder Company Report E You have less than 0 Contact X Upgrade to Full Version Set up Tools Notifications Help Ad     Proofreading us
Switch to Private CardHolder	All Cards Search by name, company, job file, city and mc Search Advanced Filter
Sort by Date	dLearn more) + Add Card V
All Cards	Invite Colleagues Add Department Card Sharing Setting Create Company Tags Download Mobile App
Hide Duplicate Card(s)	essicials can be updeaded in relatives
Created by Me	
I shared	
Share added business cards	Card Sharing Setting
Shared with Me	
Subordinate Cards	Standard Sharing - Admin can access all cards, superior can access his or her subordinate's cards
Tags	O Company-wide Sharing - Everyone can access all company cards
🖉 Tag Management	
All Cards	
O Untagged	
O VIP	
Q	
	Skip Back Next

## 3.5 Add Company Tags

Adding company tags can help categorize and manage cards more easily. After adding

CC CAMCARD BUSINESS ~	CardHolder Company	Report F You have less than 0 Proofreading	Contact X Upgra		
CC Switch to Private CardHolder	All Cards		Search by nar		Search Advanced Filter
Sort by Date				dia	Im more + Add Card ~
All Cards	Invite Colleagues	Add Department Card Sh	aring Setting Create Company Tags	Download Mobile App	ards can be uploaded in batches ×
Hide Duplicate Card(s)					energy
Created by Me			mpany Tags		
Ishared		All colleagues can easily group the	ir customers by adding tags to cards		
Share added business cards		Tag name	Add		
Shared with Me					
Subordinate Cards		Leads			
Tags		VIP			
🖉 Tag Management					
All Cards					
O Untagged					
O VIP					
S. M.					
	Skip			Back Next	

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 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.

	Search by name, company, job title, city and more	Advanced Filter		+ Add Card
al 1 business cards			Item: Share adde	d business cards ∨ 1L Sort by Da
Card Image	Name/Company	Department/Title	Contact Info	Creator
1	-	includes and inclu		
-				

## 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.

	CardHolder Company	Report Email Biz Activity Tasks	Colleagues	🏟 🖗 🗂 🔊 🕷 •
D Home	- <u>2</u>			
Permission Settings  Manage Departments  Manage Users  CRM Settings	Plan Information Current Plan:Business Edition Due date:2047-10-18 Renew Plan Upgrade Plan	Number of Users Used: (48) Unused: (152) Add Users	Proofreading Used: (0) Unused: (2) Purchase Proofre	
Google Contacts Settings     Outlook Contacts Settings     Security Configuration	Permission Settings	Manage Departments	Manage Users	CRM Settings
	Google Contacts Settings	Outlook Contacts Settings	Security Configuration	

## 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.

	CardHolder Company Report Email Biz Activity Tasks Colleagues
Home	Permission Settings
👂 Permission Settings	Set information sharing rules
Manage Departments	Standard Sharing - Admin can access all cards, superior can access his or her subordinate's cards     Company-wide Sharing - Everyone can access all company cards
CRM Settings G Google Contacts Settings Outlook Contacts Settings	Add colleagues who can edit all cards Assign Roles Change Creator
Security Configuration	Company Tag Setting  Users can create, edit and use company tags Users can only use company tags *Company admin can create, edit, delete and use company tags
	Allow all users to copy cards to Private CardHolder  Disable Enable Only authorized users can copy cards to Private CardHolder

#### 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

	CardHolder Company Report Email Biz Activity Tasks	Colleagues	• 🖉 ۲ 😋 😫
Home	Manage Departments		+ Add Department
Permission Settings     Manage Departments     Manage Users     CRM Settings     Google Contacts Settings     Outlook Contacts Settings	<ul> <li>⇒ cobtestdata333</li> <li>test</li> <li>⇒ 133</li> <li>⇒ 44</li> <li>⇒ 55</li> <li>⇒ 66</li> <li>⇒ 12</li> </ul>	Add Department × Superior Department	
Security Configuration	<ul> <li>⇒ zzz</li> <li>⇒ coc</li> <li>⇒ coc</li> <li>⇒ coc</li> <li>→ ddd</li> <li>− test3</li> <li>→ ~</li> <li>→ 1111001</li> <li>− mf</li> </ul>	Mentours Balact members Share cards department-wide OFF Cancel CK	

existing department name to edit it.

	CardHolder Company I	Report Email Biz Activity Tasks	Colleagues	©	\$ 0° 0 🔊 •
Home	Manage Departments				+ Add Department
& Permission Settings	⊟ ccbtestdata333				
A Manage Departments	- test				
A Manage Users	ie test2				
	ii - 33				
CRM Settings	e 55 Add Sub-depa	rtment 🖉 Change 🥥 Delete			
G Google Contacts Settings  G Outlook Contacts Settings	66				
	⊜- 12				
Security Configuration	e zzz				
	ier zzz ier ccc				
	- n				
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	111				
	CardHolder Company F	teport Email Biz Activity Tasks	Colleagues	٩	s 🖸 0 📓 ·
Home	Manage Departments				+ Add Department
Permission Settings	⊜ ccbtestdata333				
A Manage Departments	- test	Add Sub-department	×		
A Manage Users	⊜- test2 ⊜- 33	Superior Department			
CRM Settings		33	~ ·		
G Google Contacts Settings	≡ 55	Name *			
Dutlook Contacts Settings	66				
Security Configuration	一 测试分享	Members			
	₩-222	Select members	¥.		
	E- 000	Share cards department-wide			
	⊜ cco – ¶	ON	× .		
	- ddd	Can	сеі ОК		
	- test3				
	- a'> 1111001				
	CardHolder Company	Report Email Biz Activity Tasks	Colleagues	0	8 Ø O 📓•
Home	Manage Departments				+ Add Department
👂 Permission Settings	⊜ ccbtestdata333				
A Manage Departments	lest	Edit Department	×		
A Manage Users	e test2 e 33	Superior Department			
CRM Settings	≝ - 33 <u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u><u></u></u>	44			
G Google Contacts Settings	⊞- 55	Name *			
Outlook Contacts Settings	- 66	55			
Security Configuration	⊨ 12 测试分享	Members			
Contraction Contraction	B- 22Z	Select members			
	i≘- ccc	Share cards department-wide			
	eee — m	ON	· · · · · · · · · · · · · · · · · · ·		
	- n	Car	OK		
	- test3				
	- a*>				
	- 1111001				

	CardHolder Company Report Email Biz Activity Tasks Colleagues	\$ ۲	Ø	0	-
Home	Manage Departments			Add Depa	rtment
Permission Settings  Manage Departments  Manage Users  CRM Settings  G Google Contacts Settings  D Outlook Contacts Settings	<ul> <li>⇒ cobtest/data333</li> <li>→ test</li> <li>⇒ 33</li> <li>⇒ 44</li> <li>⇒ 55</li> <li>→ 66</li> <li>⊂ 66</li> <li>⊂ 67</li> </ul>				
Security Configuration	- million ⇒ coc ⇒ coc - a - dod - text3 - for - 10001 - m				

#### 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.

Home	Active	Invited		Batch Update User In	nfo Se	t as Inactive	+Invite
Permission Settings							
Manage Departments Manage Users	(1) Harris (Court)	2mm					
CRM Settings	COMPANY CONTRACTOR						
Google Contacts Settings Outlook Contacts Settings	in any. Advecting paperation						
Security Configuration	cohtest233 cohtest233@poperail.com						
	x0x0.002999 cct/ms22922(byspecial.com						
	Holly Li context200@yepreal.com						
	BB Brothilly-spenal con						

#### 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.]

CAMCARD BUSINESS S	CardHolder Company Report Email	I Biz Activity Tasks Colleagues		\$ \$ 0 D \$.
Home	Active • Inactive Staff • Invited			
Fermission Settings	Search user			
Anage Departments	Name (Email)		successor	
👗 Manage Users			andorada	
CRM Settings	Ma Hara 2001 (gyopmail.com			
G Google Contacts Settings	10.000 (0.000			
Outlook Contacts Settings				
Security Configuration	任意志 schled201ggrapmal.com			
	意用 Landfieldsfallsfandsfands ympnei000gyppinal.com			
	amy00204 colden204@sepmail.com			
	ochtes1198 cchtes1190gjyopmal.com			
	00000	50/page v Total 19 < 1 >	Go to 1	

#### 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.

D Home	Active • Inactive Staff •	Invited				Ca	ncel Invitation	Re-invite
Permission Settings	Search user							
Manage Departments	Name (Email)	Role	Name		Constant of the second s		Data David	
🖁 Manage Users	Name (Email)	P(0)0	Name		Superior		Data Export	
CRM Settings	15298379220	User	测试分享 ×	Ŧ	Clear Superior		Enable	
Google Contacts Settings	17364586539	User	测试分享 ×		Clear Superior		Enable	
Outlook Contacts Settings								
Security Configuration	15006289308	User	测试分享 ×	*	Clear Superior		Enable	
	12312@yopmail.com	User	test2 × 测试分享 ×	v	Clear Superior		Enable	

# 4.4.4 Update employees in bulk

Support bulk update of employees via excel templates.

	CardHolder Company Report Email Biz Activity Tasks Colleagues	© © © © •
Home	Active - Inactive Staff - Invited Batch Update User Info	Set as Inactive +Invite •
Permission Settings  Ananage Departments  Ananage Users	zzz     x *     Search user       Name (Emeil)     Role     Name     Superior	Q Data Export
CRM Settings G Google Contacts Settings Duttook Contacts Settings Security Configuration	Super Admin	V Disable V
CAMCARD BUSINESS S	CardHolder Company Report Email Biz Activity Tasks Colleagues	\$\$ \$° 0 <b>™</b>
_	CardHolder Company Report Email Biz Activity Tasks Colleagues Batch Update User Info	84 ₩ ₩ ₩ ₩ ₩ ₩ ₩
<ul> <li>Home</li> <li>Permission Settings</li> <li>Manage Departments</li> <li>Manage Users</li> <li>CRM Settings</li> <li>Google Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Security Configuration</li> </ul>	Step1.       Download Exect of current user list.         Step2.       Open the form you downloaded in step 1, modify the information as needed. Please do not change any of the column headings         Step3.       Click "Import" to import the form you modified in step 2.	Back to Manage Users

# 4.4.5 Invite colleagues

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

	≈ CardHolder Company	Report Email	Biz Activity Tasks	Colleagues		1	¢ ÷ 🗇	o 📓 -
O Home	Active • Inactive Staff •	Invited			Batch Update User	Info		+invite •
✤ Permission Settings	Invite Colleagues					×		
Manage Departments     Manage Users	Email	Role	Department	Superior	Data Export		Data Export	
CRM Settings		User v	Select Department	• Clear Superic	Enable 🗸		Disable	
G Google Contacts Settings			G					
Security Configuration								
	Invite User: 1/148 Purchase more use	rs 🔲 Invite via SMS			Cancel	ation		
			50/page 🐰	fotal 1 < 🚺 > Go	to 1			

# 4.4.6 Other ways to invite colleagues

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

through links.

	CardHolder Company	Report Email Biz Activity	Tasks Colleagues		\$ \$ © 0 <b>\$</b> .
1 Home	Active • Inactive Staff •	Invited		Batch Update User Info	Set as Inactive +Invite +
Permission Settings     Manage Departments     Manage Users	zzz × +	Search user	Name	Superior	Batch Import Users Use Invite Link Data Export
CRM Settings G Coolde Contacts Settings Cuttook Contacts Settings Cuttook Contacts Settings Security Configuration	amy ccbtest205@yopmail.com	Super Admin \vee	16512 × 222 × 15513 × 185818931818 × +1	Holly Li	V Disable V
		50/pi	age v Total 1 < 1 > Go to 1		

	CardHolder Company Report Email Biz Activity Tasks Colleagues	• 🗟 ۲ 🕲 😹 •
O Home	Active - Inactive Staff - Invited	Batch Update User Info Sat as Inactive + Invite •
<ul> <li>Permission Settings</li> <li>Manage Departments</li> </ul>	ZZZ         x +         Search user           Name (Emol)         Role         Name	
<ul> <li>Manage Users</li> <li>CRM Settings</li> <li>Google Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Security Configuration</li> </ul>	Kome (cheat)     Role     Norre     Kome (cheat)     Role     Kome (cheat)     Copy the following information and send if to a colleague:     mixes you to jon (cime) Cick's the link to jon.     Cencel Capy Link	Sopenov Duta Export  Holly Ll  Deable
	50 page 🗸 Total 1 < 1 > Go to	1

## 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

<ul> <li>Permission Settings</li> <li>Manage Departments</li> <li>Manage Usors</li> <li>CRM Settings</li> <li>Google Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Salesforce</li> <li>SalgarCRM</li> </ul>		CardHolder Company	Report Email B	Biz Activity Tasks Colleagu	Jes	®	0
Manage Departments     Subor a Creat system       CRM Settings     Image Users       Google Contacts Settings     Salesforce       SugarCRM     Microsoft Dynamics	D Home	CRM Settings					
Google Contacts Settings     Outlook Contacts Settings     Salesforce     SugarCRM     Microsoft Dynamics	Manage Departments	Select a CRM system					
Outlook Contacts Settings     Salesforce     SugarCRM     Microsoft Dynamics		salesforce					
Security Configuration Next	G Google Contacts Settings	Salesforce	O SugarCRM	O Microsoft Dynamics			
	Security Configuration	Next					

# 4.5.2 SugarCRM

Home CRM Settings   A Manage Departments. Select a CRM system   A Manage Departments. Image Departments.   Image Departments. <t< th=""><th><ul> <li>Venta</li> <li>Permission Settings</li> <li>Manago Dopartments</li> <li>Manago Usors</li> <li>Geogle Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Salesforce</li> <li>Salesforce</li> <li>SugarCRM</li> </ul></th><th><ul> <li>Venta</li> <li>Permission Settings</li> <li>Manago Dopartments</li> <li>Manago Usors</li> <li>Geogle Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Salesforce</li> <li>Salesforce</li> <li>SugarCRM</li> </ul></th><th></th><th>CardHolder Company Report Email Biz Activity Tasks Colleagues</th><th>\$ ≅ ⊡ 0</th></t<>	<ul> <li>Venta</li> <li>Permission Settings</li> <li>Manago Dopartments</li> <li>Manago Usors</li> <li>Geogle Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Salesforce</li> <li>Salesforce</li> <li>SugarCRM</li> </ul>	<ul> <li>Venta</li> <li>Permission Settings</li> <li>Manago Dopartments</li> <li>Manago Usors</li> <li>Geogle Contacts Settings</li> <li>Outlook Contacts Settings</li> <li>Salesforce</li> <li>Salesforce</li> <li>SugarCRM</li> </ul>		CardHolder Company Report Email Biz Activity Tasks Colleagues	\$ ≅ ⊡ 0
Manage Departments         Manage Users         CRM Setings         G Coogle Contacts Settings         D Outlook Contacts Settings         D Outlook Contacts Settings	Manage Departments         Manage Users         CRM Settings         Cogo Contacts Settings         Outlook Contacts Settings         Outlook Contacts Settings	Manage Departments         Manage Users         CRM Settings         Cogo Contacts Settings         Outlook Contacts Settings         Outlook Contacts Settings	1 Home	CRM Settings	
G Google Contacts Settings Salesforce • SugarCRM Microsoft Dynamics	G Google Contacts Settings Salesforce • SugarCRM Microsoft Dynamics	G Google Contacts Settings Salesforce • SugarCRM Microsoft Dynamics	Manage Departments	Select a CRM system	
Outlook Contacts Settings     Selesforce     SugarCRM     Microsoft Dynamics	Outlook Contacts Settings     Selesforce     SugarCRM     Microsoft Dynamics	Outlook Contacts Settings     Selesforce     SugarCRM     Microsoft Dynamics	CRM Settings	slesfore	
Security Configuration	Security Configuration Next	Security Configuration		Salesforce • SugarCRM Microsoft Dynamics	
			Security Configuration	Next	

	CardHolder Company Report Email Biz Activity Tasks Colleagues	• • • • • •
Home	CRM Settings	
<ul> <li>Permission Settings</li> <li>Manage Departments</li> <li>Manage Users</li> </ul>	Configure SugarCRM Server Address O How to get server address?	
CRM Settings     G Google Contacts Settings     Outlook Contacts Settings	Step 1: sign in with admin account. Username Step 2: click the Profile drop-down menu at the top-right comer; and select admin	
Security Configuration	Pessword         ②         №	
	<b>用户設置</b> 在指旗前時候風話: ダ 起以風話: Grobal 服み提示: 学校出 原件推示: 学校出 用社: Hota Jurinta 2082 total sugarcm.ed 可任が発展: -	

# 4.5.3 Microsoft Dynamics

	CardHolder Company Report Email Biz Activity Tasks Colleagues	\$	Ø	0	- 10
Home	CRM Settings				
Permission Settings  Manage Departments  Manage Users  CRM Settings	Select a CRM system				
G Google Contacts Settings	Salesforce SugarCRM Microsoft Dynamics				
Security Configuration	Nost				
CAMCARD BUSINESS S	CardHolder Company Report Email Biz Activity Tasks Colleagues	\$	ø	0	-
Home	CRM Settings				
Permission Settings A Manage Departments Manage Users	Microsoft Dynamics Configuration Server Address How to get server address?				
CRM Settings G Google Contacts Settings Outlook Contacts Settings Security Configuration	Configuration completed thtps://portal.office.com/adminportal/homes/ho mps/gog Slop2: Click "CRA/" button in the submenu of "Admin" Slop2: Click "CRA/" button in the submenu of "Admin" Slop2: Click "Edit" button Slop2: Click "Edit" button				
	Skept Check the URL 常規设置 * 色彩				

## 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.

	CardHolder Company Report Email Biz Activity Tasks Colleagues		Ø	0	-
Home	Google Contacts Settings				
Permission Settings Manage Departments	Enabled. Users can export their cards to Google Contacts Disable Disable				
A Manage Users	Export cards to Google Contacts				
CRM Settings					
G Google Contacts Settings Outlook Contacts Settings					
Security Configuration					

## 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.

	CardHolder Company Report Email Biz Activity Tasks Colleagues	\$	0	- 🔝
Home	Outlook Contacts Settings			
🔑 Permission Settings	Enabled. Users can export their cards to Outlook Contacts			
A Manage Departments	Disable			
A Manage Users	Export cards to Outlook Contacts			
CRM Settings				
G Google Contacts Settings				
2 Outlook Contacts Settings				
Security Configuration				

## 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

	CardHolder Company R	aport Email Biz Activity Tas	ks Colleagues	® © © 🛐
Home	IP Restriction • Mobile Restric	tion - Multi-factor Authentication	Other	
<ul> <li>Permission Settings</li> <li>Manage Departments</li> <li>Manage Users</li> </ul>	IP	IP		
CRM Settings G Google Contacts Settings Outlook Contacts Settings	Turn off IP address restriction	Turn on IP address restriction		
Security Configuration	]			

# **5 FURTHER QUESTIONS**

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

vipsupport@intsig.com