

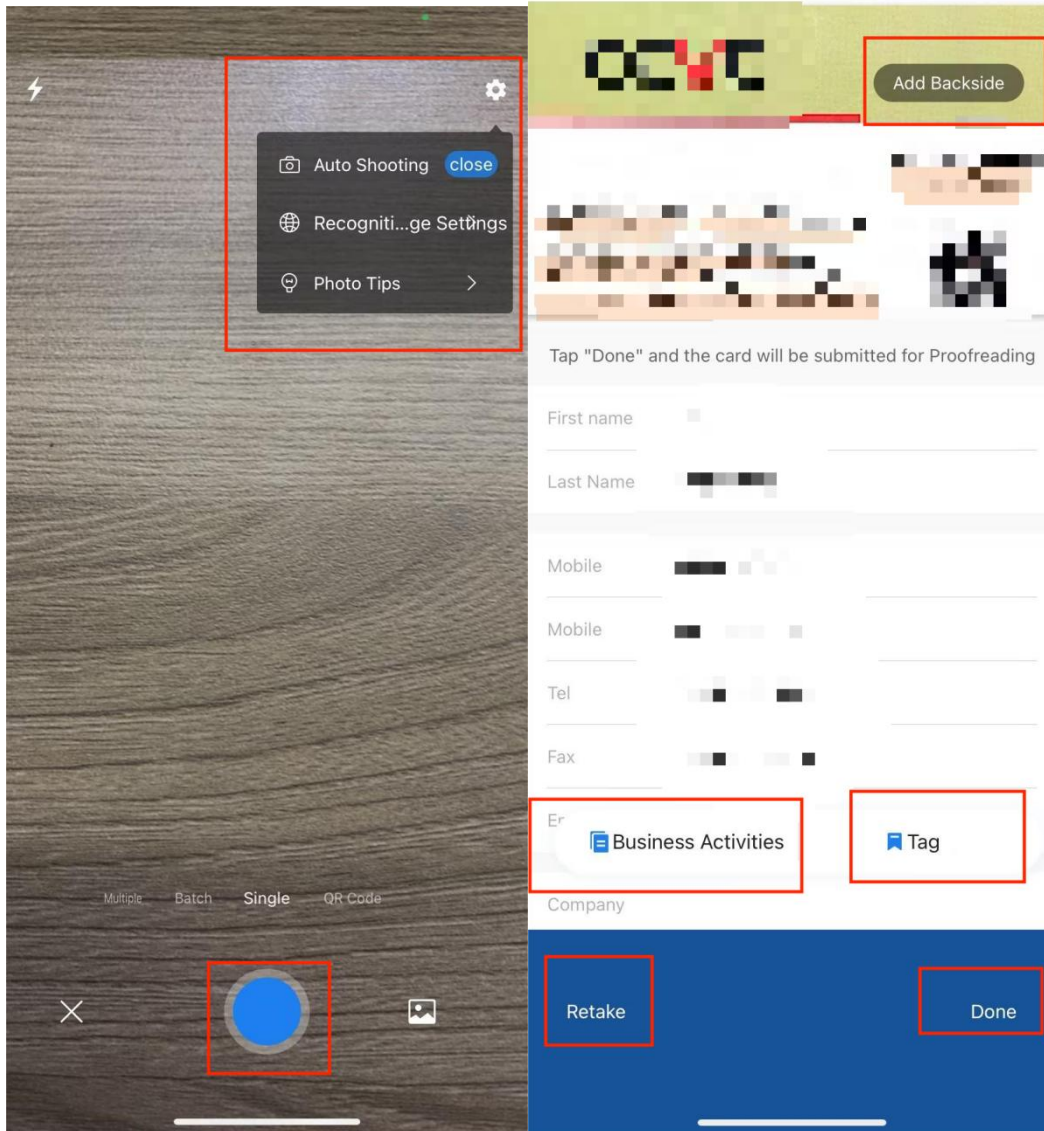
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Add Cards

Take Photo

- Open CamCard Business app and enter the 'Company CardHolder' page. Click the "Capture Card" button at the bottom of the page to capture card images.
- When capturing the card image, please make the card fill the frame to the full and ensure a good lighting condition. The app will automatically focus and capture the card image.
- If you are not satisfied with the image, please tap the "Retake" button in lower-left to re-capture an image.
- Tap the "Add Backside" button in the upper right corner then you can capture and save the backside image of the card.
- After capturing the card image, you can group the card with tags. Sele "Company Tags" to save and categorize the cards in Company CardHolder, or select "Private Tags" to save and categorize the cards in your Private CardHolder.
- Tap "Next" to continue taking photos, or tap "Done" to save the card.
- Card information will be recognized and saved automatically. You don' t have to manually proofread the card details.

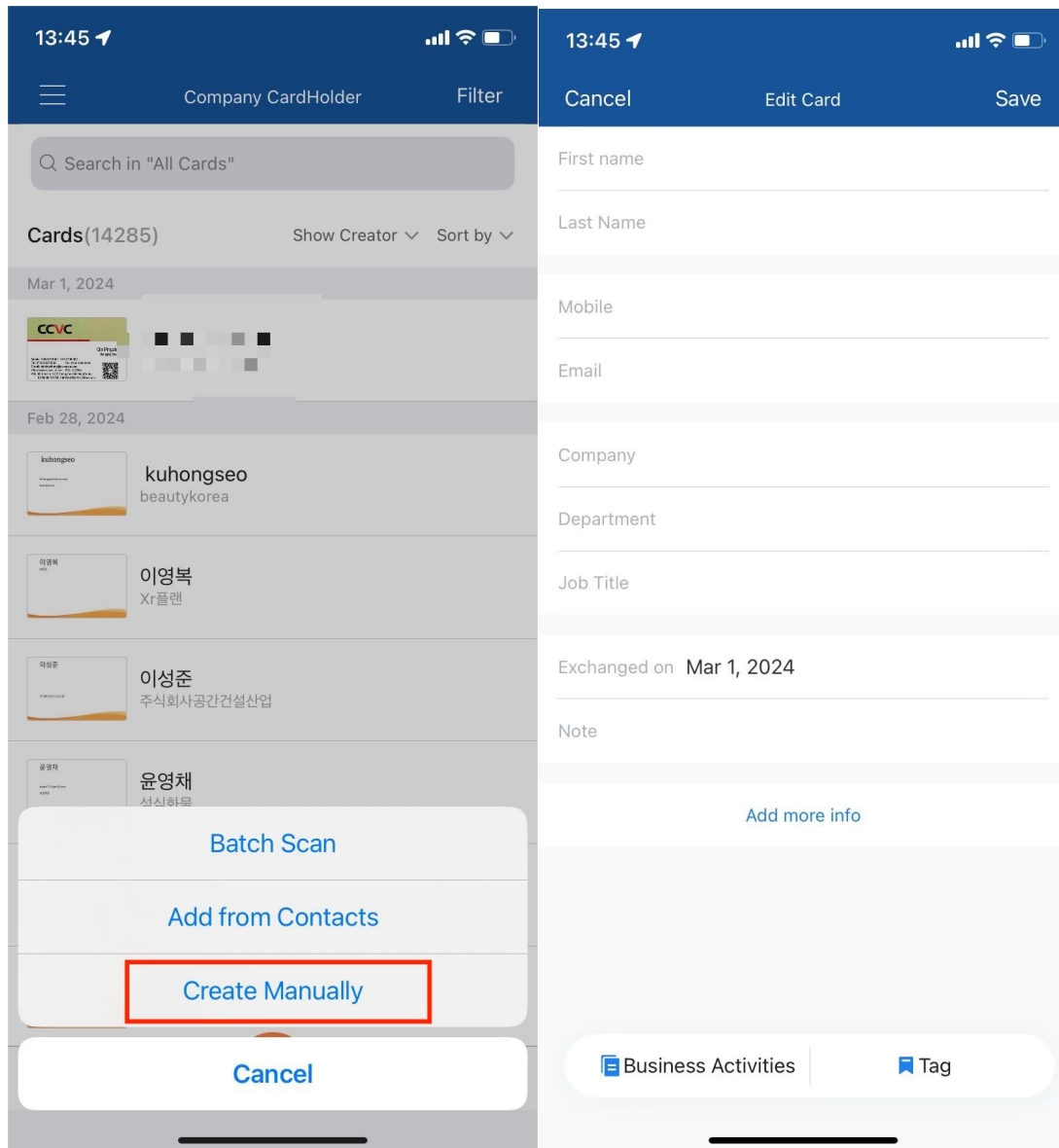


Create Manually

mobile phone

Open CamCard Business -> Company CardHolder -> Add Card (lower-right) ->

Create Manually -> enter card information and tap "Save" .



PC

For web app: Visit b.camcard.com -> sign in with your CamCard Business account

-> “Add Card ” (upper-right) -> enter card information and click “Save”

(upper-right).

CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

0a Search by name, company, job title, city and more Advanced Filter **+ Add Card**

2 items found Item: All Cards 1. Sort by Date

Card Image	Name/Company	Department/Title	Contact Info	Creator
	[Redacted]	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	Title	Email Telephone	[Redacted]

200/page Total 2 1 Go to 1 Processing... (1 operations left)

CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

← All Cards ← **create business card** Cancel **Save**

Search by name, company, job t Q 0a 2 items found

Basic Information

Last name

First name

Contact Info

Mobile

Telephone

Fax

Email

Tags [Add Tags](#)

Company Info

Company Info

Department

Title

Website

Address

Street1

Street2

City State

Zip Country

More

Nickname

IM

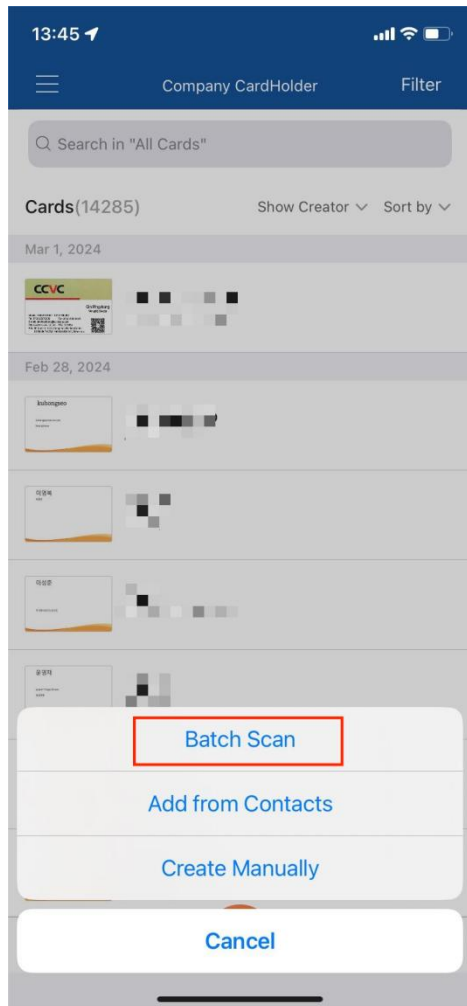
Social Network

Anniversary

Click here to add tags

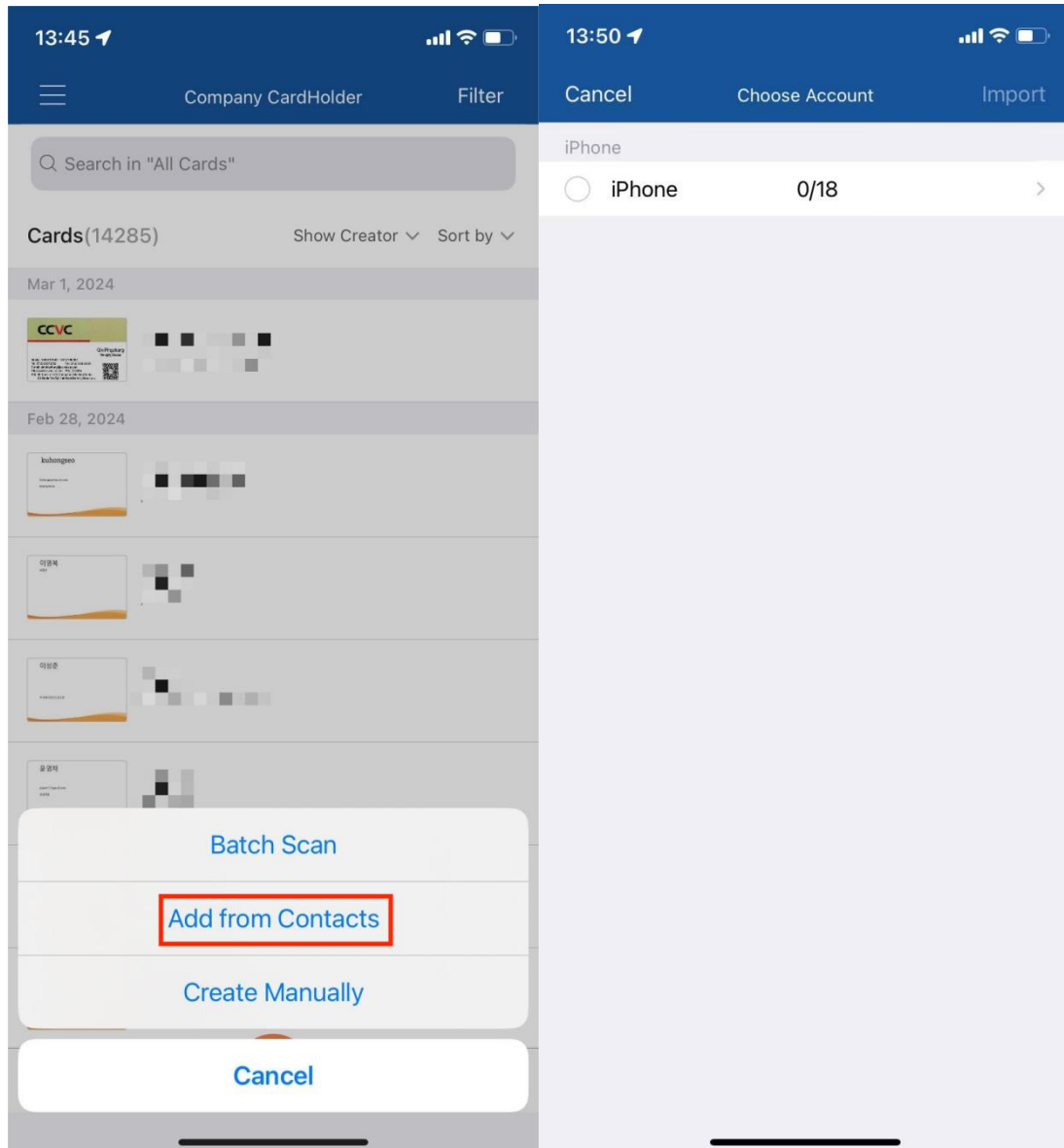
Batch Scan Cards with Scanner

[Click here to view the user manual of CamCard scanner.](#)



Add from Contacts

- Open CamCard Business app -> Company CardHolder -> Add Card (lower-right)
->Add from Contacts
- Choose the contacts or the groups you want to add and tap “Confirm” in the to add them into CamCard Business. If you have several contact accounts, you need to choose an account first.



Import Excel

- Visit b.camcard.com -> sign in with your CamCard Business account -> click the tools button.
- Click "Import Excel" and follow the prompts to download the excel template. Input your card data into the template and make sure that the data format is consistent with the template.

CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

0a Search by name, company, job title, city and more Advanced Filter + Add Card

2 items found

Card Image	Name/Company	Department/Title	Contact Info
	[Redacted]	[Redacted]	[Redacted]
	[Redacted]	Title	Email Telephone

200/page Total 2 < 1 > Go to 1 Processing... (1 operations left)

CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

Export to Excel
Export to CRM
Export to Google Contacts
Export to Outlook Contacts
Copy Cards to Private CardHolder
Import Excel
Change Password
Company Tags
Recycle Bin

Import Excel

Step1. Download Template

standard template.csv

Step2. Please make sure your format is identical with the excel template. [Learn More](#)

Step3. Import contacts from Excel (File size cannot exceed 10MB. Item number cannot exceed 10000)

Import

Processing... (1 operations left)

Kindly note:

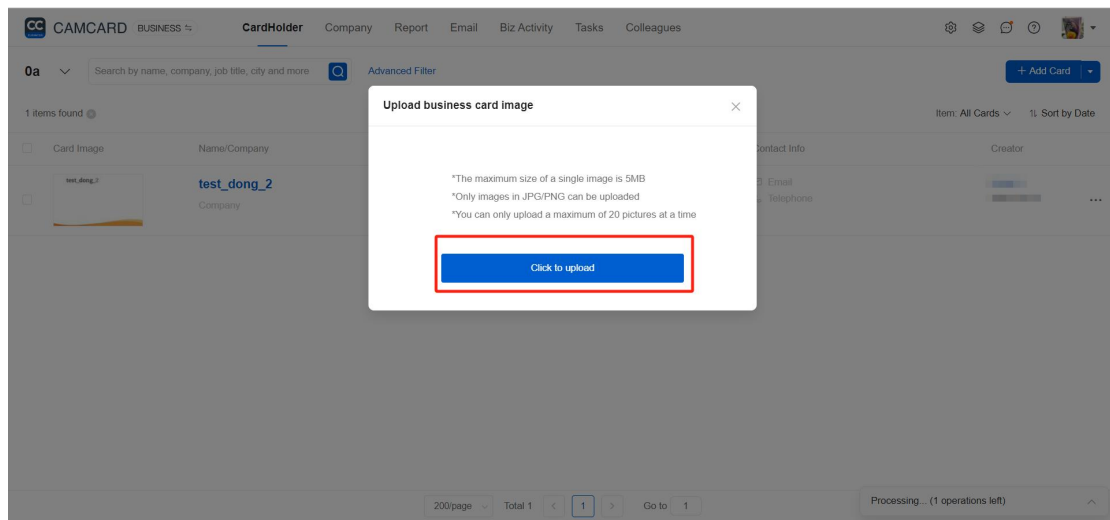
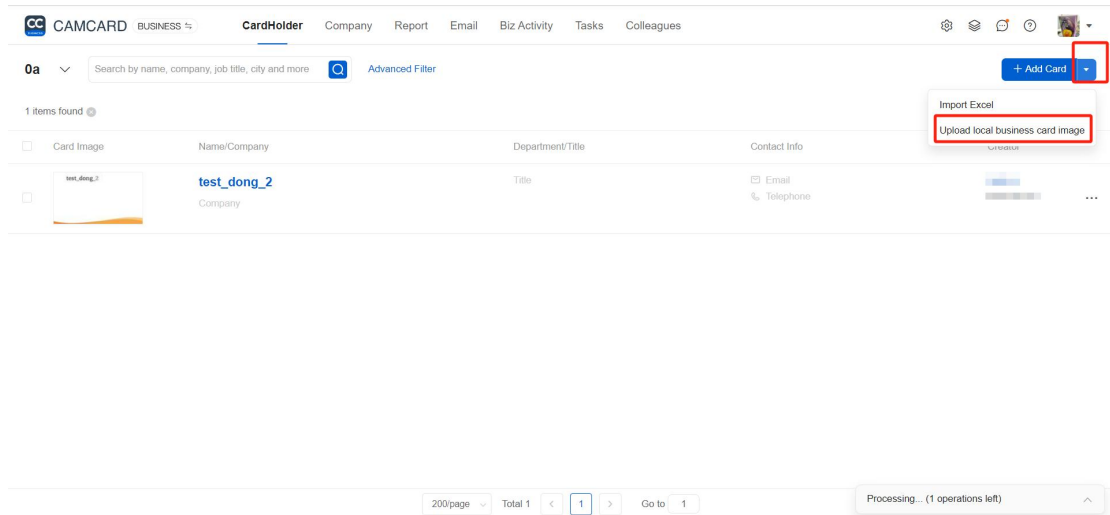
When editing the template, please do not delete or modify any of the column names in the first line.

The second line is the card information sample for your reference, please delete this line before importing the excel file.

When importing large amounts of contacts, please do not import more than 2000 contacts at one time as too many data may slow down the importing speed. Please patiently wait and do not interrupt when the data are importing.

Import local business card images in batches

Click the drop-down symbol next to "Add Business Card" on your computer and follow the prompts to import your local business card image.



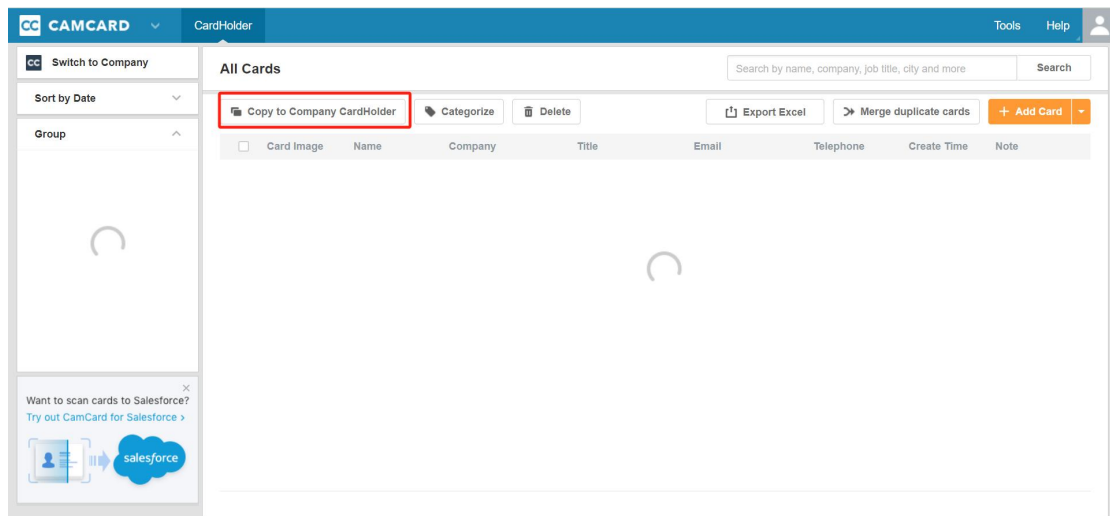
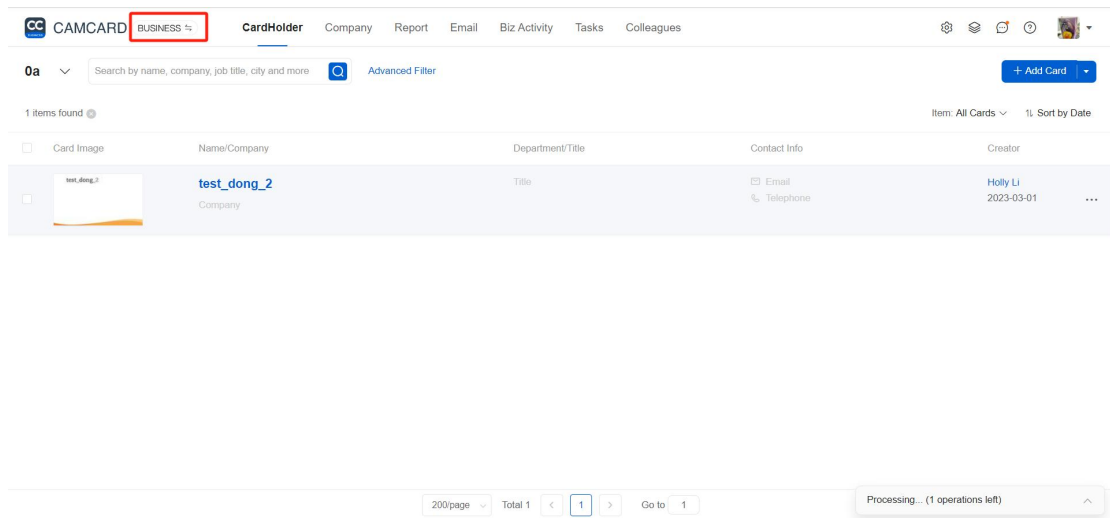
Copy Cards from Private CardHolder to Company CardHolder

For PC:

- Visit b.camcard.com -> sign in with your CamCard Business account -> click

the arrow on the upper left to switch to your CamCard personal account.

- On the personal account page, click “Copy to Company” (upper-right) -> select the cards which you want to copy -> click “Copy to Company CardHolder” .



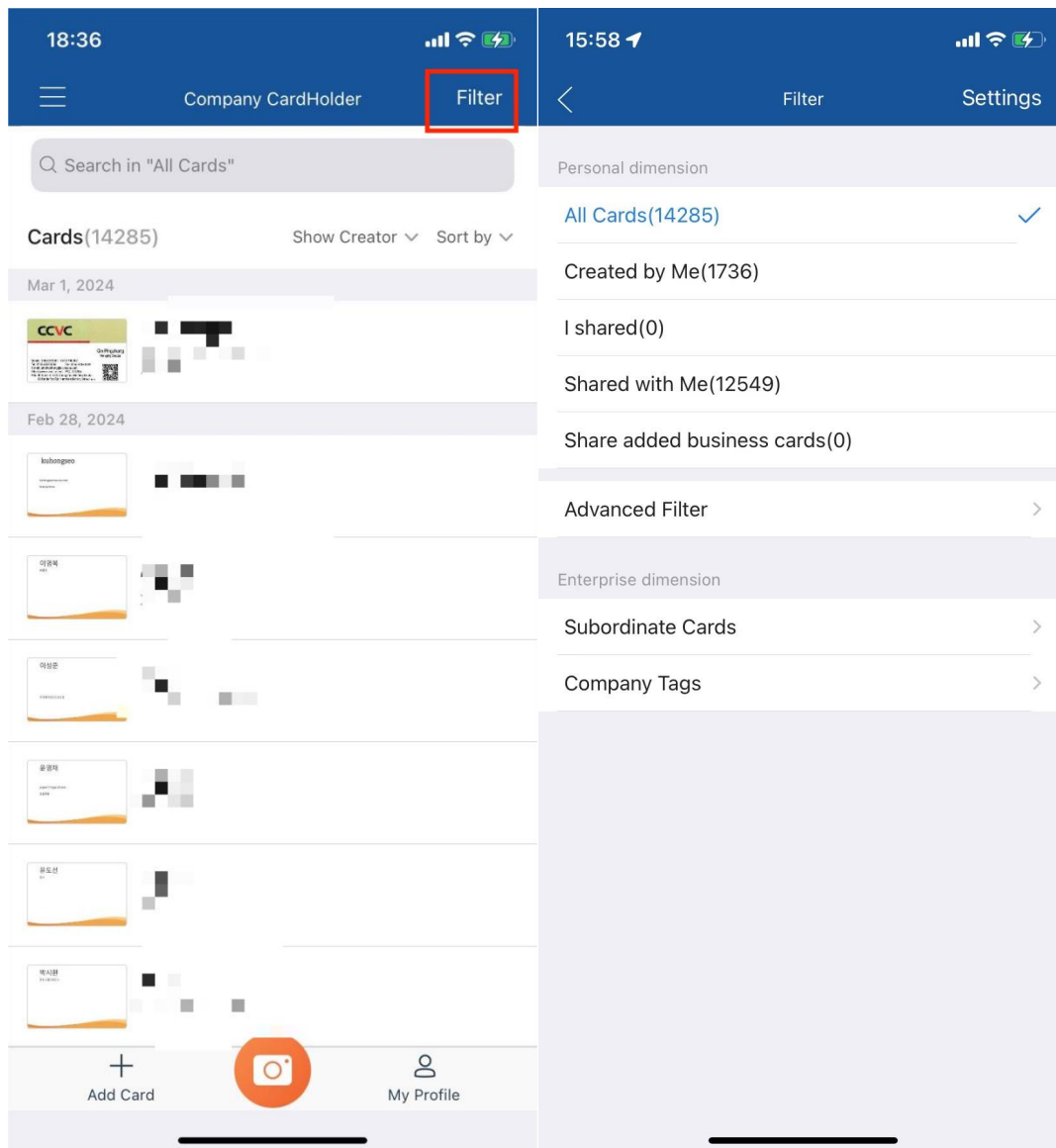
Manage Cards

View Cards

For mobile app:

- Open CamCard Business app and enter the “Company CardHolder” page.

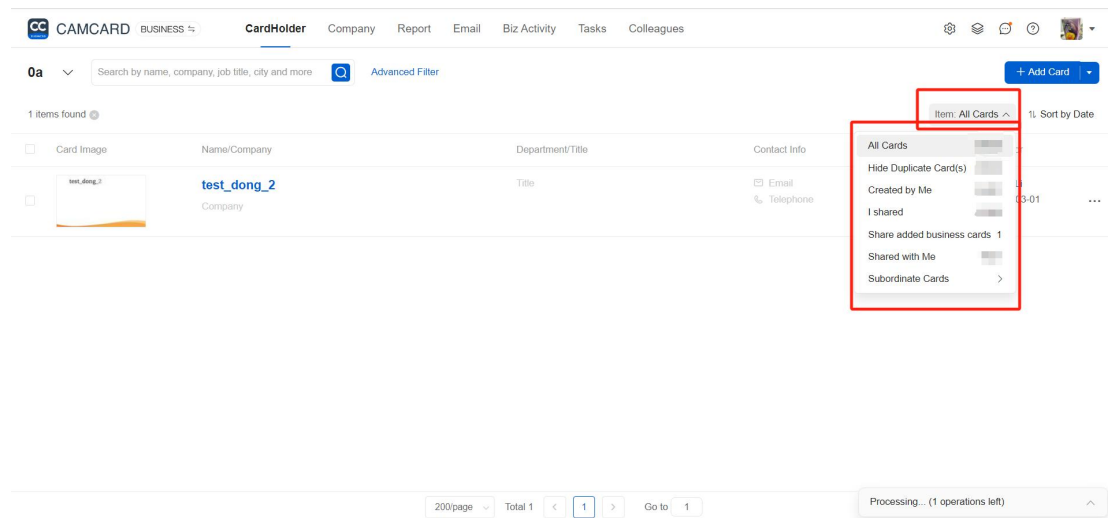
- Tap the “Filter” and you can view the cards based on different tags like “All Cards”, “Created by Me”, “Subordinate Cards” and etc. The “Subordinate Cards” contains all cards added by your subordinates.



For PC:

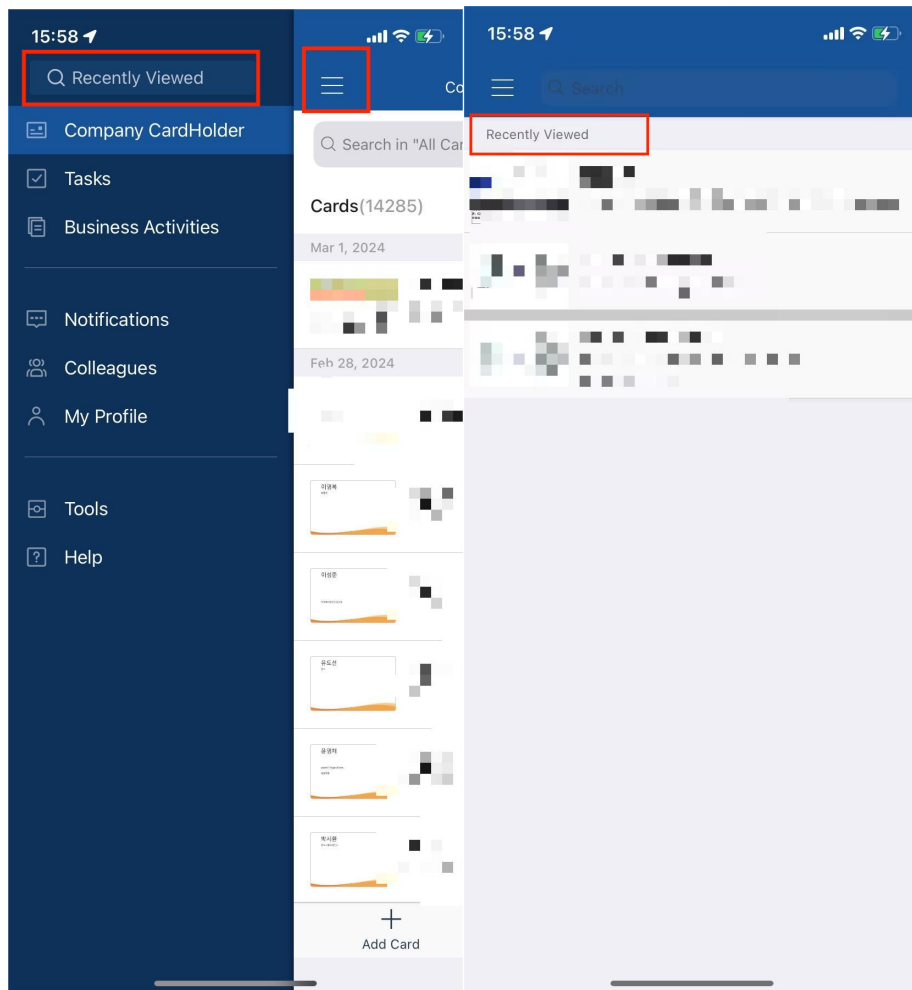
- Visit b.camcard.com and sign in with your CamCard Business account.
- Click the card icon. By choosing “Created by Me”, “Shared with Me” or “Subordinate Cards” in the “All Cards” column or choosing different tags in the “Tags” column, you can view cards in different groups.

*The “Subordinate Cards” includes all cards added by your subordinates.



Search for business cards

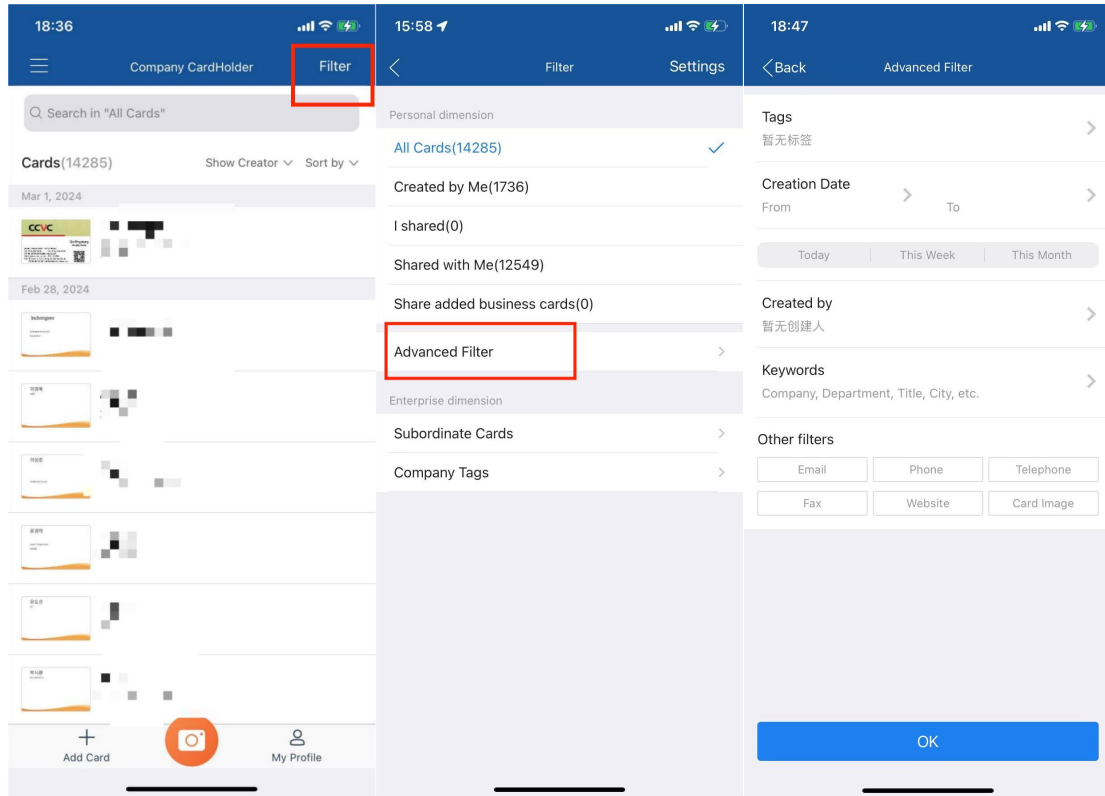
Open the app and enter a keyword to quickly search for a business card. You can also quickly search for business cards by entering keywords in "Search/Recently Viewed".



Advanced search for business cards

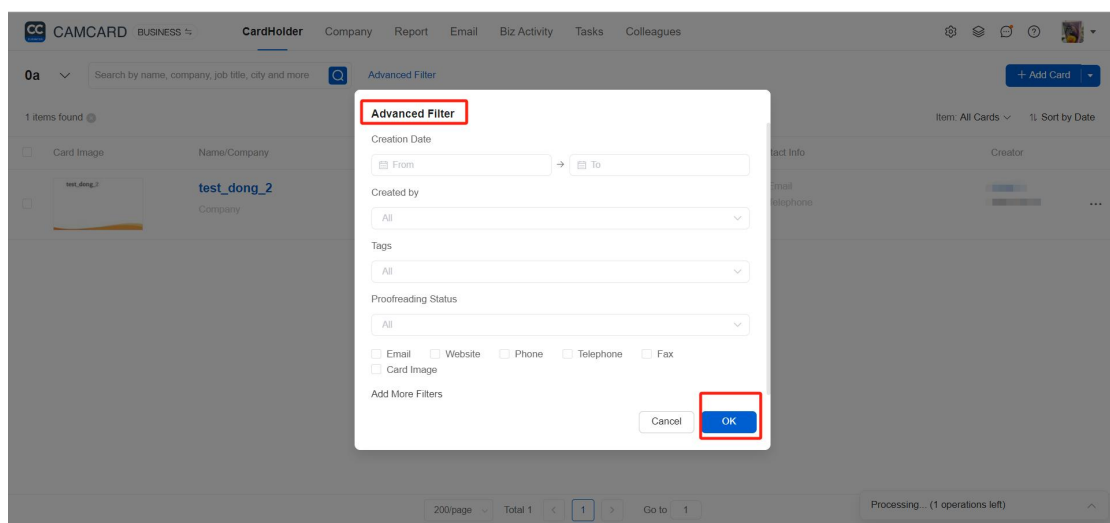
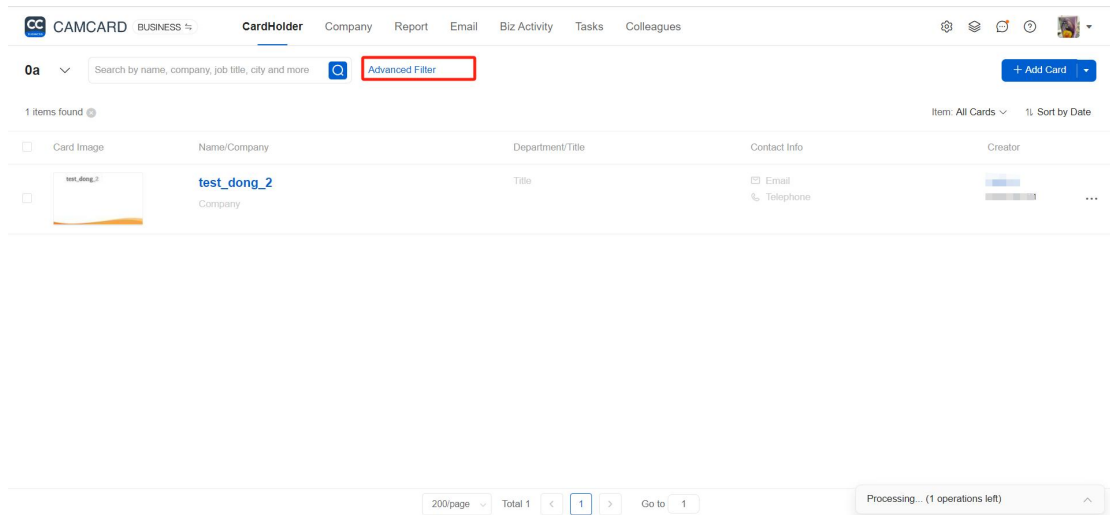
For app:

- Click “Filter” and select Advanced Filtering.
- On the Advanced Filter screen, you can select Tags, Time Range, Created By, Keywords, and other conditions.



For PC:

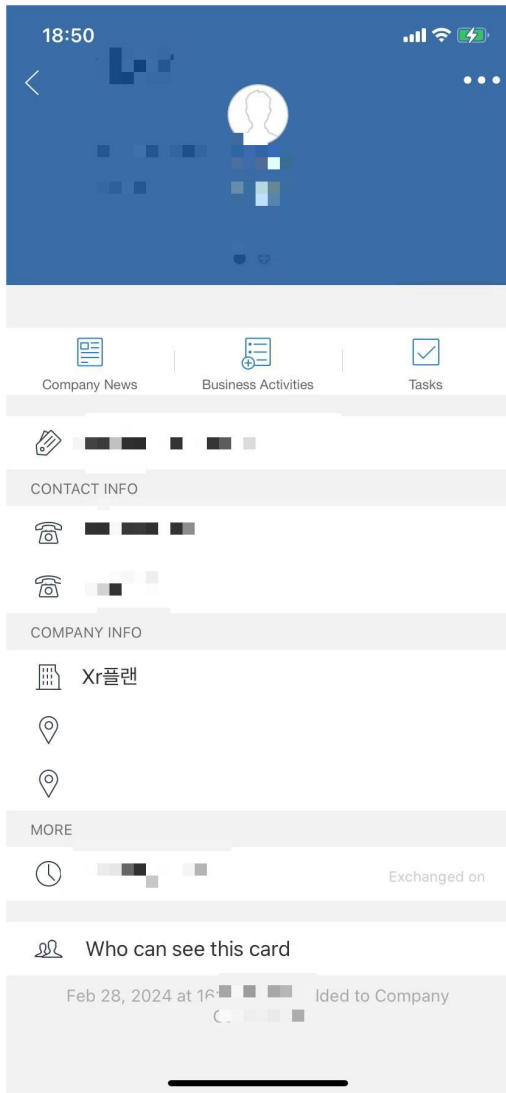
- Visit b.camcard.com and log in to your CamCard Business account.
- On the card holder page, click "Advanced Filtering". It can be based on your needs (time frame for creation, business card creator, tags, keywords, email, company, Job title, city, etc.), find the business card you need efficiently and conveniently.



View business card details

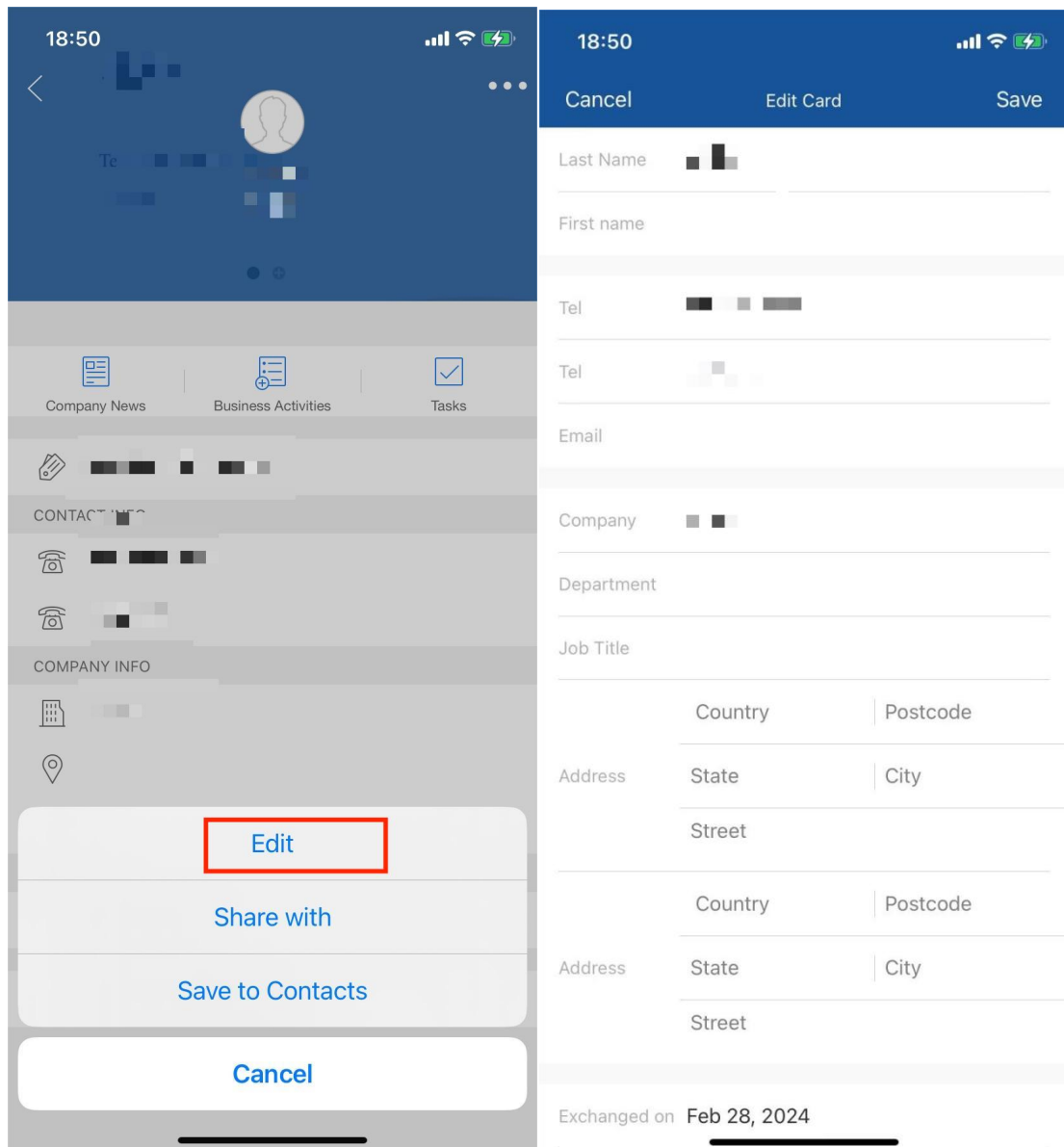
Open CamCard's business app, enter the company card holder page, and click on the contact card to view his or her detailed information (contact information, company news, business records, and tasks, etc.).

View the blue area at the top of the page to view the image of the scanned business card.



Edit business cards

When viewing the details of the card, click "Edit" to complete the edit.

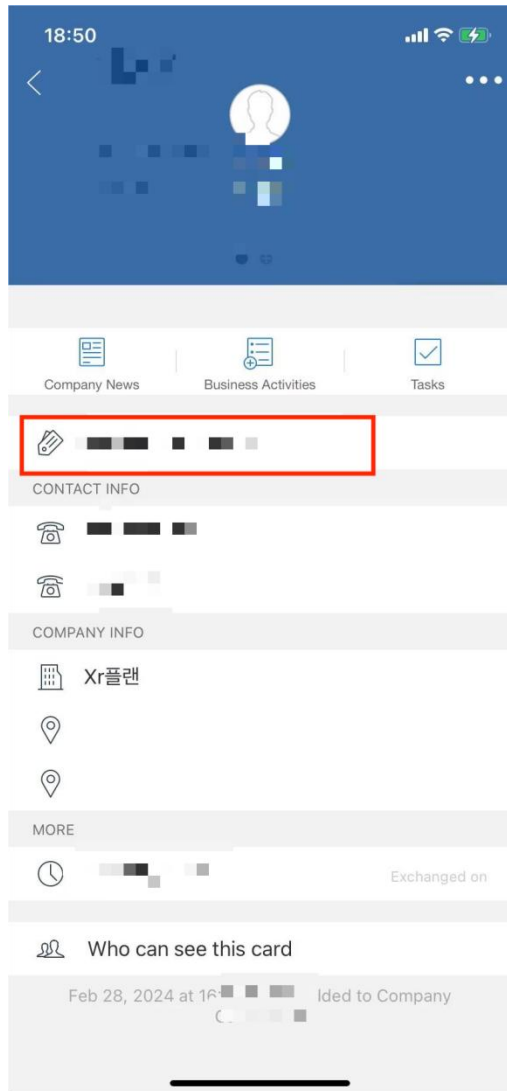


Manage business cards and collaborate with your team

Set labels for your business cards

For app:

- Open CamCard Business app, click the contact card to enter the card details page, and click "Click to add tag". You can also label your business card when you shoot it.



For PC:

- Visit b.camcard.com and log in to your CamCard Business account.
- Click on the business card to enter the business card information page, and click "Edit Label" in the lower right corner of the page to add a label.

CC CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

0a Search by name, company, job title, city and more Advanced Filter + Add Card

1 items found Item: All Cards 1. Sort by Date

Card Image	Name/Company	Department/Title	Contact Info	Creator
	test_dong_2 Company	Title	Email Telephone	

200/page Total 1 1 Go to 1 Processing... (1 operations left)

CC CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

← All Cards Search by name, company, job 1 0a 1 items found

test_dong_2 Title Company

2023-03-01(Date Received)

Tags Edit Tag

2 123123 1q1 0a 0aa

HR changes No updates

Tasks To-do + Add New Task

Biz Activity Add a new business activity

Accessible to + Add

Accessible to + Add

Processing... (1 operations left)

- Click "...", you will see "Label" at the bottom right of the card details, and after clicking, you can select the label.

CC CAMCARD BUSINESS CardHolder Company Report Email Biz Activity Tasks Colleagues

0a Search by name, company, job title, city and more Advanced Filter + Add Card

1 items found Item: All Cards 1. Sort by Date

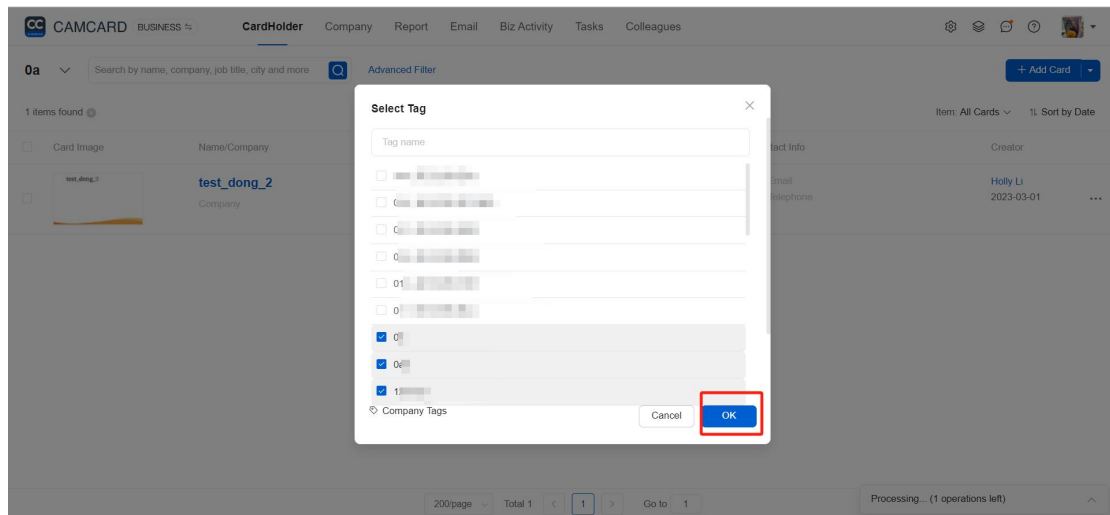
Card Image	Name/Company	Department/Title	Contact Info	Creator
	test_dong_2 Company	Title	Email Telephone	Holly Li 2023-03-01

+ Add New Task

+ Add a new business activity

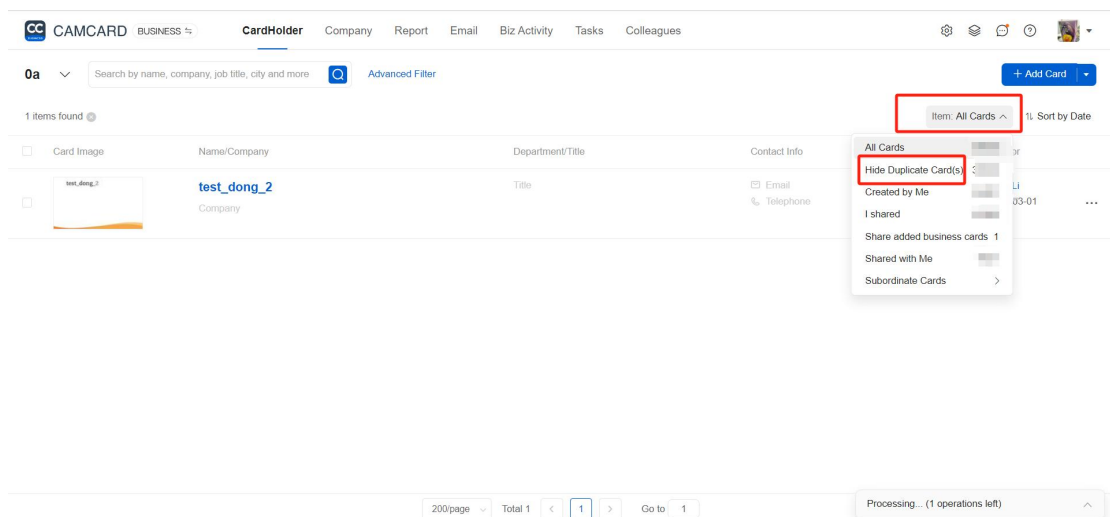
+ New Tag

200/page Total 1 1 Go to 1 Processing... (1 operations left)

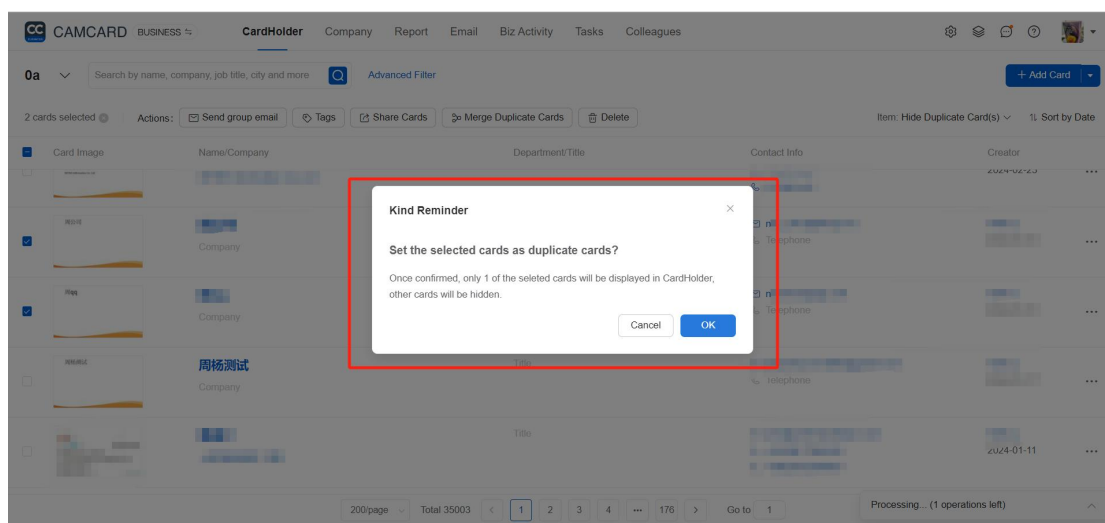
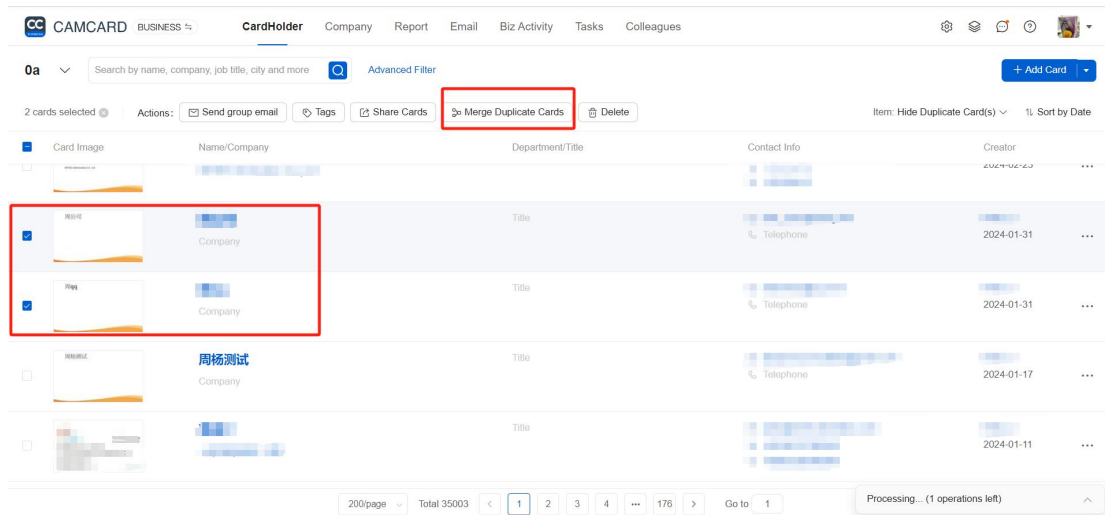


Merge duplicate business cards

- Access the computer b.camcard.com, log in to your CamCard Business account, the system will automatically filter all business cards regularly, and when the same business card is found, it will be automatically linked. [Click Details actions](#)



- Manual merging: You can select "Hide duplicate business cards" in the "Business Card Holder", and when hidden, only one of the same business cards will be displayed.

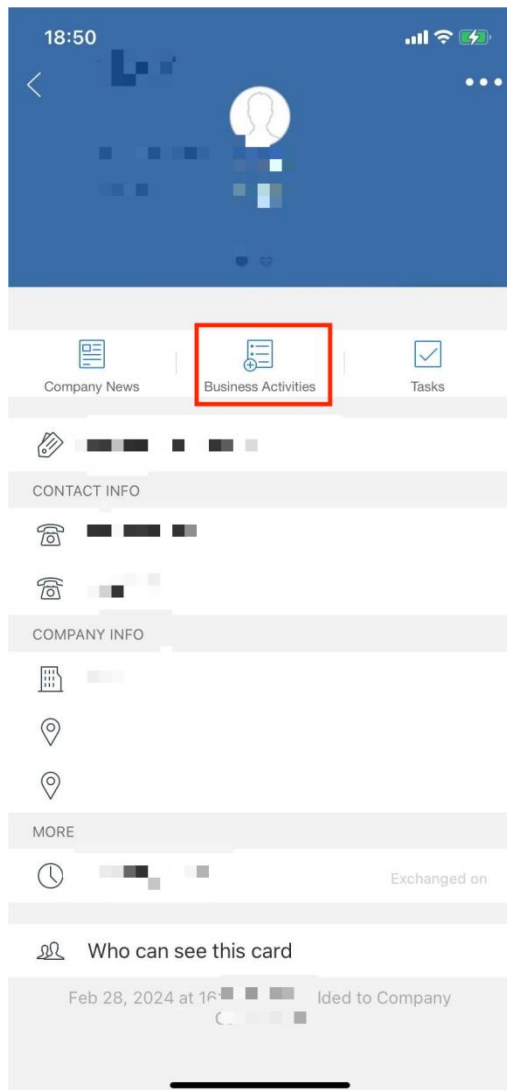


Records of visits

For app:

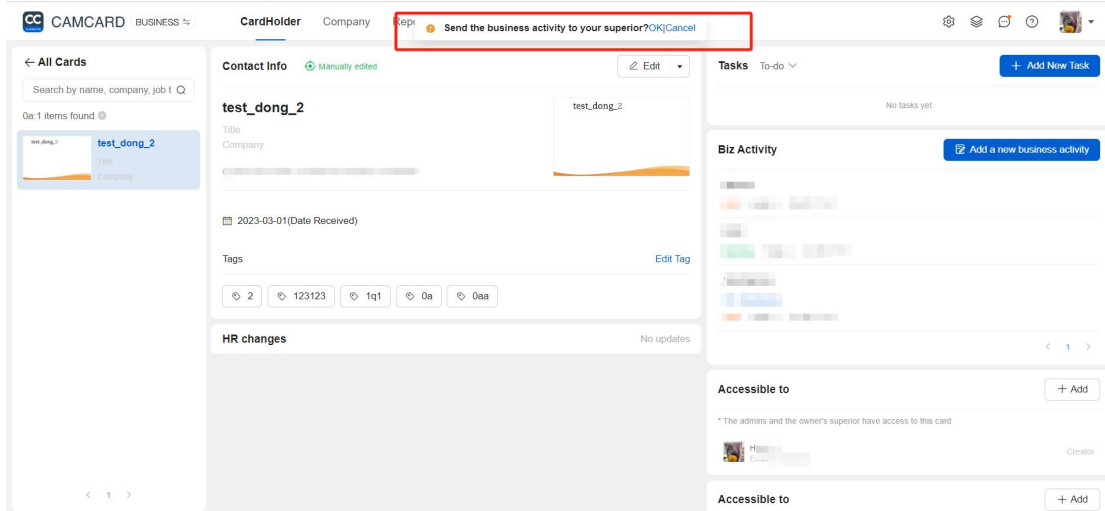
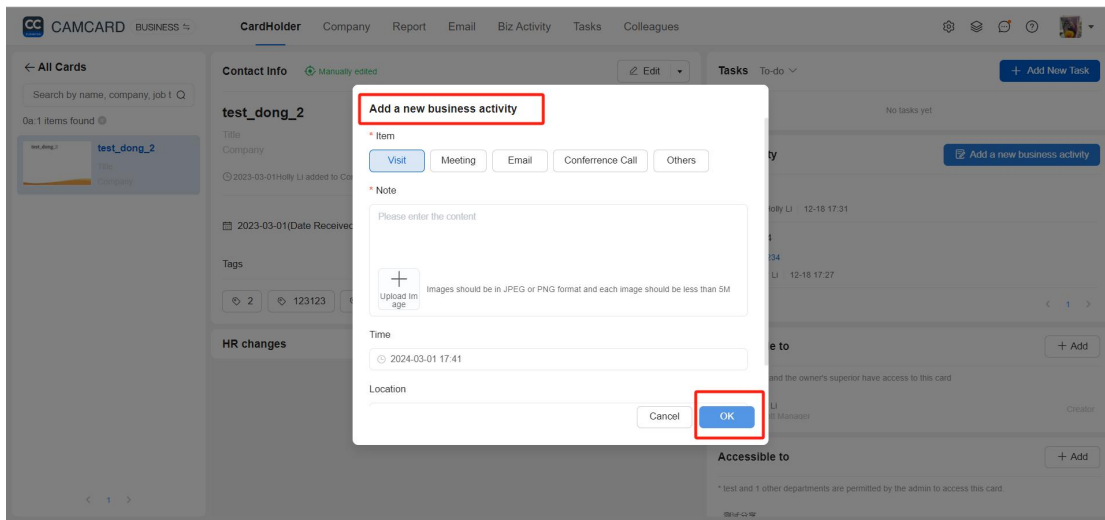
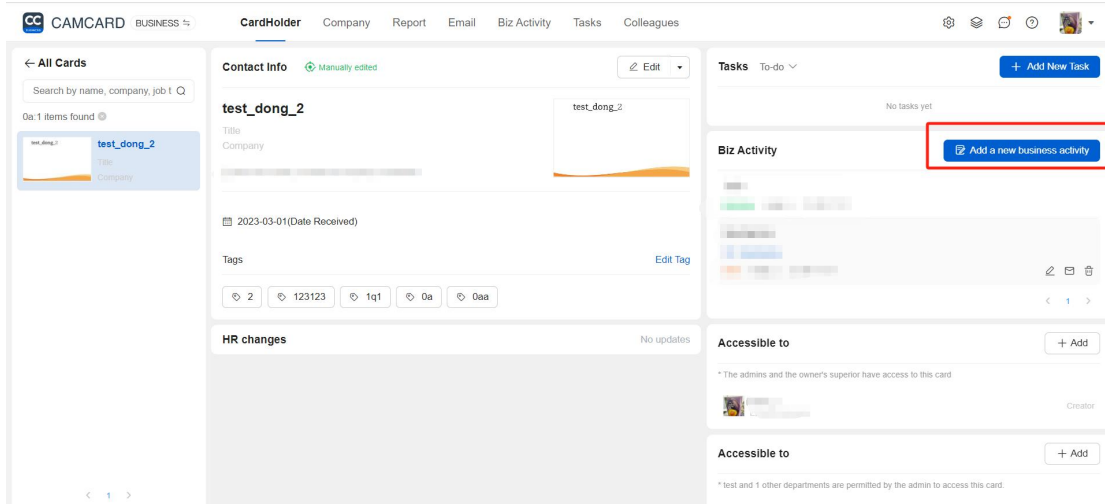
- On the "Business Card Holder" screen, click the business card of the person you are visiting, and then click "Consultation History".
- "Type": which allows you to quickly record the type of consultation;
- "Inputs": you can add information such as text and photos.
- "Location": You can get the current location information;
- "Time": record the time of the meeting. When you're done recording, click

"Save".



For PC:

- Visit b.camcard.com, log in to your CamCard Business account, click on the "Business Card Holder" page, click on the contact card, and click "Add Conversation".
- On the "Add Consultation History" screen. You can quickly select the type of meeting, such as customer visits, customer visits, emails, etc., and you can also add text, photos, time and location, and other information.
- After saving, click "Report" to quickly report the record to your boss via email.

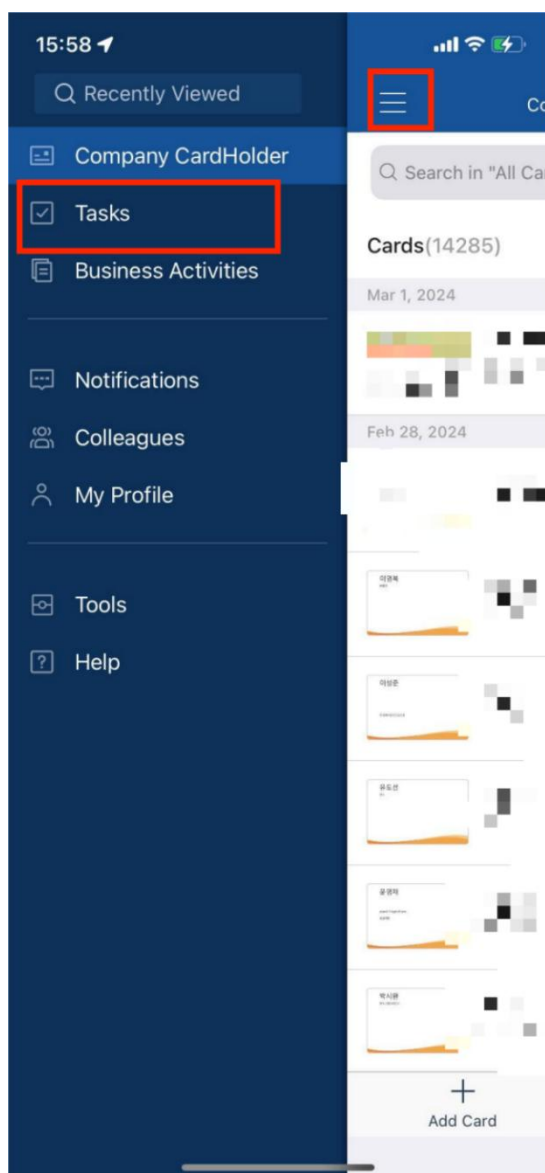


Add/assign tasks

For app:

- Open CamCard Business app, click the menu bar, and click "Tasks" to enter the task page. Click "New Task".
- On the page, you can edit the task title, set the task owner, deadline, and related contacts Business cards, completion status, add notes, and more.

*Every day at 9 a.m., CamCard Enterprise will send you a reminder if you have a to-do task due for the day.

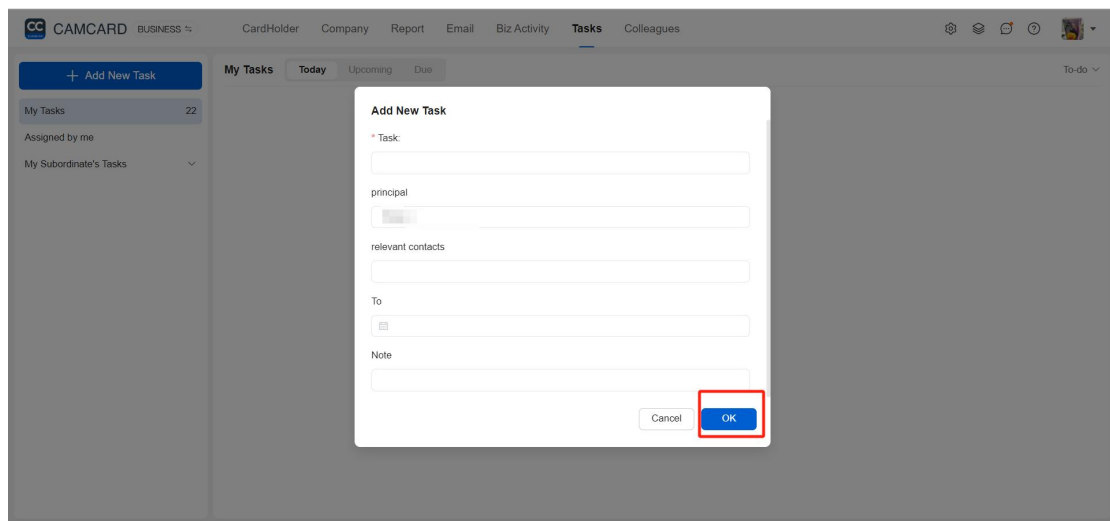
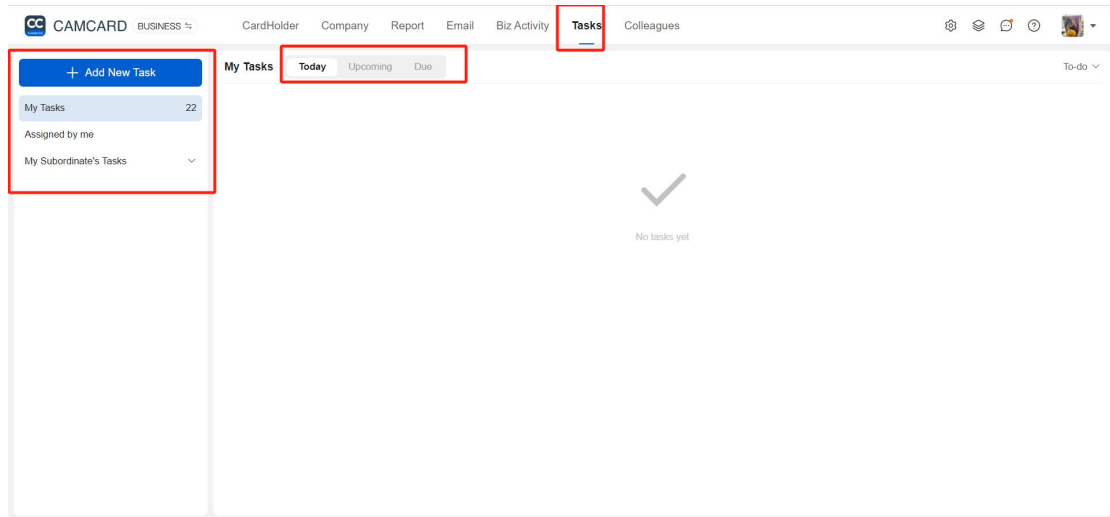


For PC:

- Visit b.camcard.com, log in to your CamCard Business account, support new

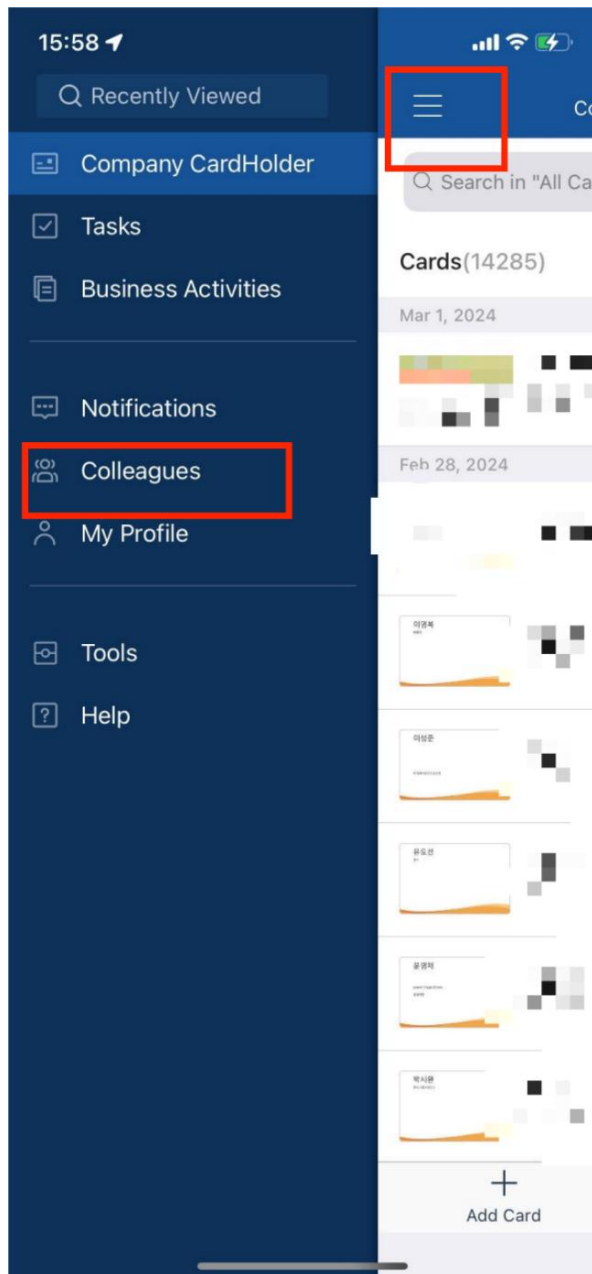
tasks, click to view tasks related to you, or subordinate tasks.

- On the page, edit the task title, set the task owner, deadline, related contact card, completion status, and add notes.



View your colleagues' business cards

Open CamCard Business app, click the “menu” , click "Colleagues", you can see the business card information of all colleagues, and click the card to view the details.



Export business cards

A super administrator, or a user authorized by a super administrator, can export business cards from a company card holder. Ordinary users can only export business cards in private business card holders under operations that are not authorized by the super administrator. (The export function is only available on pc)

Export to Excel

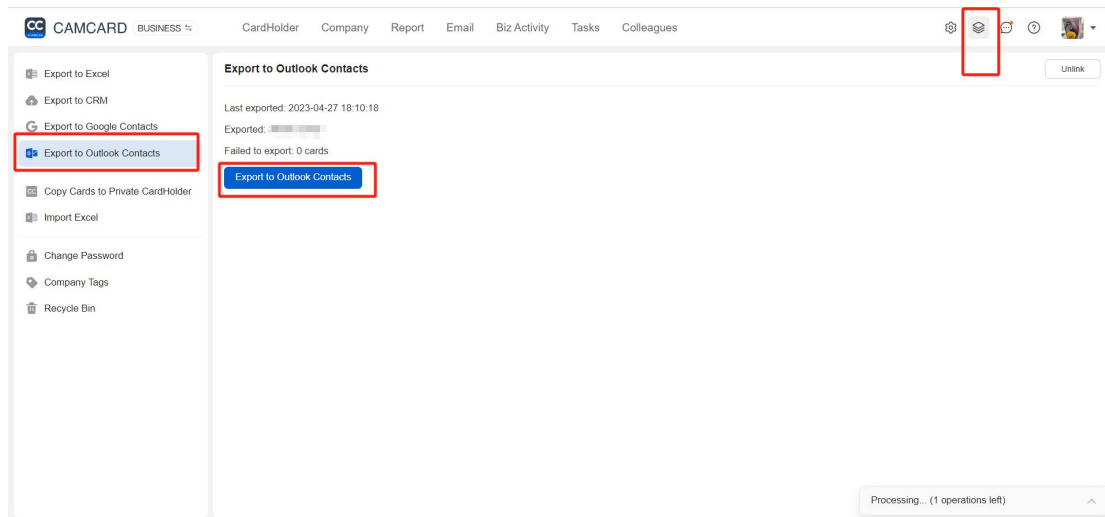
- Visit b.camcard.com, log in to your CamCard Business account, and click "Toolbox".
- Click "Export to Excel", "Export Business Card Holder to Excel". After exporting, select "Open" to "View" or "Save".

* (If you can't find the "Export Company Card Holder to Excel" button, please contact your administrator to increase this permission for you.)

The image shows two screenshots of the CamCard Business web interface. The top screenshot displays the main dashboard with a search bar and a table of business cards. A red box highlights the 'Tools' icon in the top right corner. The bottom screenshot shows the 'Tools' menu with 'Export to Excel' highlighted. A sub-menu titled 'Export cards as Excel' is open, and a red box highlights the 'Export Company CardHolder to Excel' button. The interface includes navigation tabs like 'CardHolder', 'Company', 'Report', 'Email', 'Biz Activity', 'Tasks', and 'Colleagues'. A status bar at the bottom of both screenshots indicates 'Processing... (1 operations left)'.

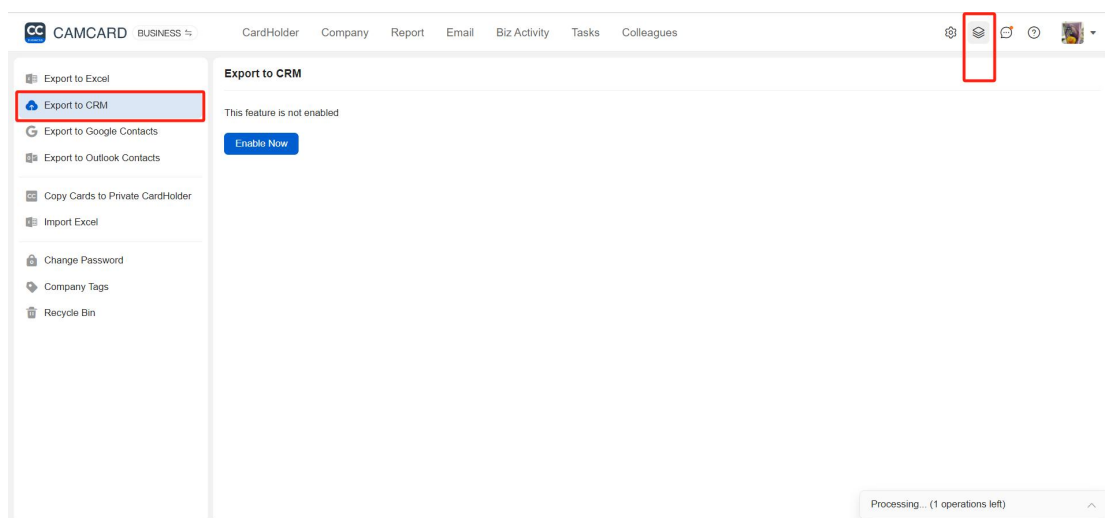
Export to Outlook

- Visit b.camcard.com and log in to CamCard Business account. Click "Tools".
- Click "Export to Outlook Contacts" , and after binding your account, you can export your business card to Outlook Contacts.



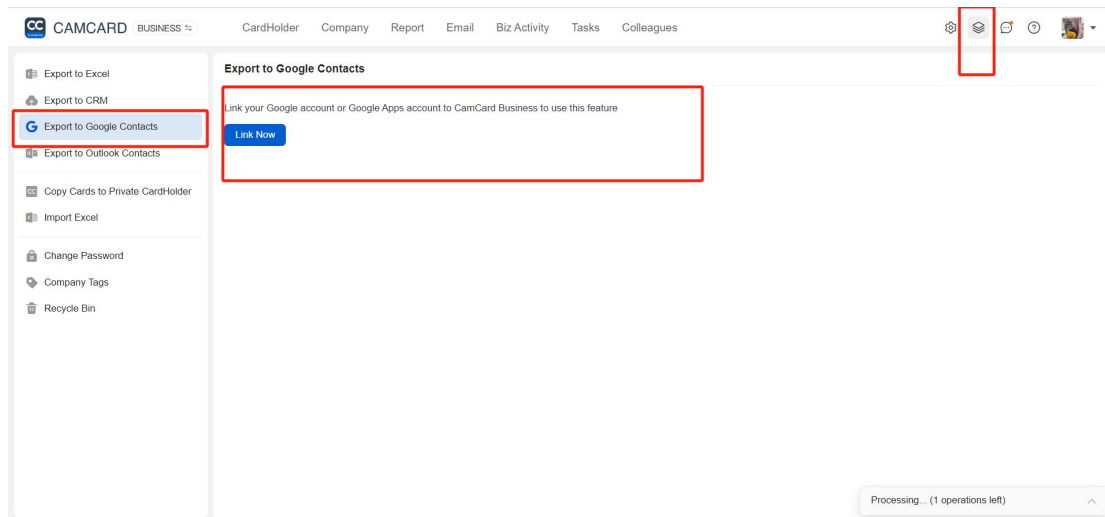
Export to salesforce/SugarCRM/Microsoft Dynamics

- Visit b.camcard.com and log in to CamCard Business. Click "Tools" .
- Click "Export to CRM", log in to the corresponding CRM account according to the administrator settings, and then export.



Export to Google Contacts

- Visit b.camcard.com and log in to CamCard Enterprise account. Click "Tools".
- Click "Export to Google Contacts", and after linking your account, you can export your business card to Google Contacts.



Save to your phone's contact

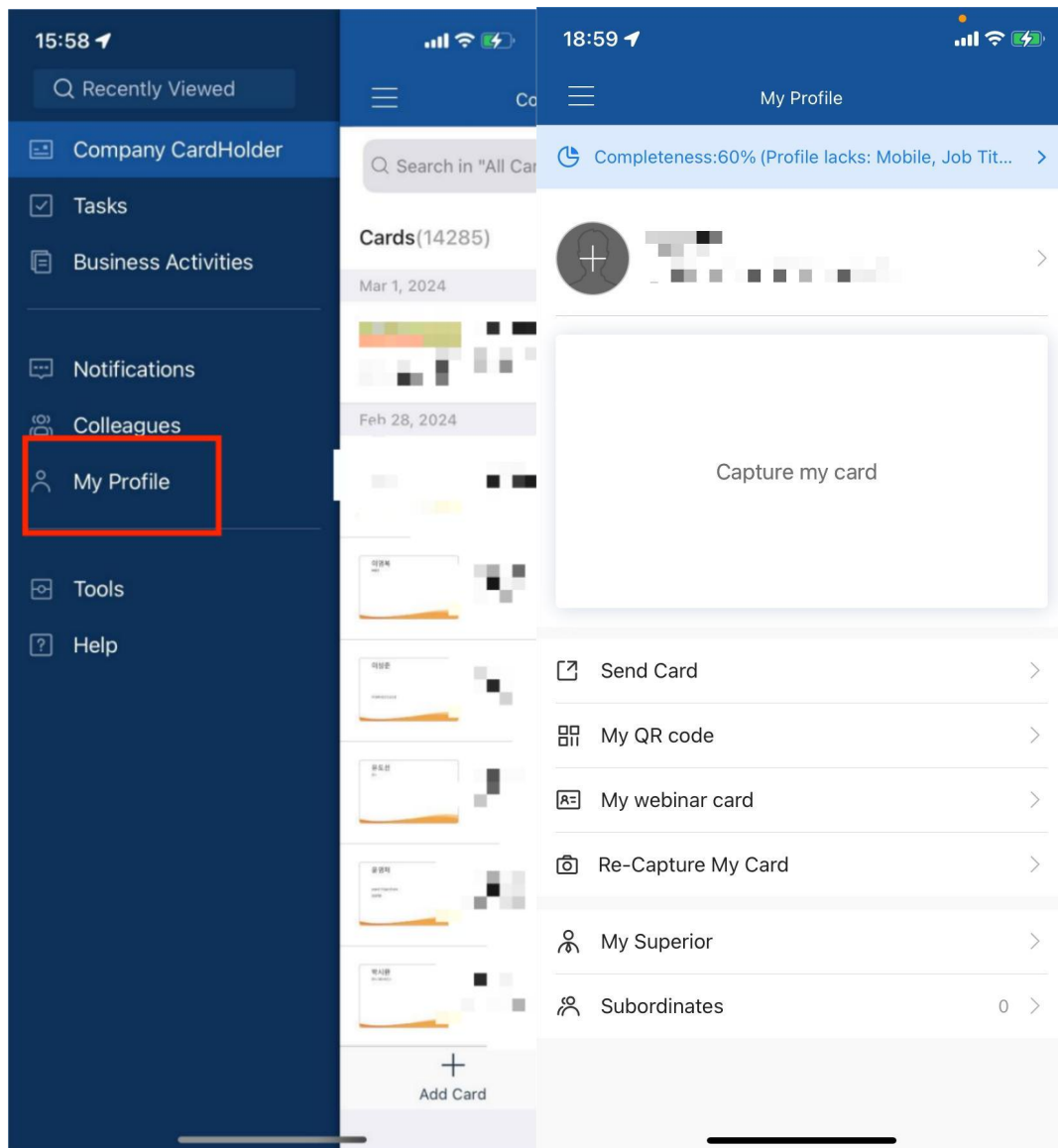
- Open CamCard Business app and click the card to enter the card details.
- Click the button and select "Save to Contacts". (In the "Toolbox" in the upper left corner, you can set the default saved address book, please refer to the detailed settings.)

Personal Center

Add my information

- Open CamCard Business app, click the button, open the left column, and click "Personal Center" to complete your personal information.

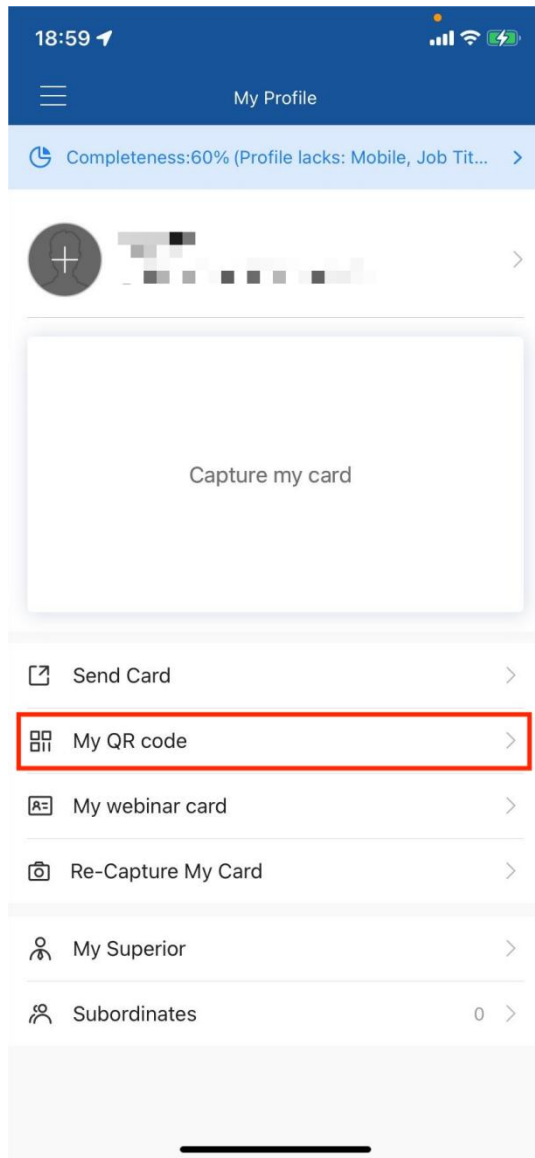
- Tap the "+" to take a photo of your business card or select an existing card to add personal information.
- Enter the information manually. If you don't have a business card, you can also manually create and complete your personal information by clicking "Edit", and the notification bar at the top can prompt the completeness of the information.



My QR code

- Open CamCard Business app, click the menu bar, and click "Personal Center". on

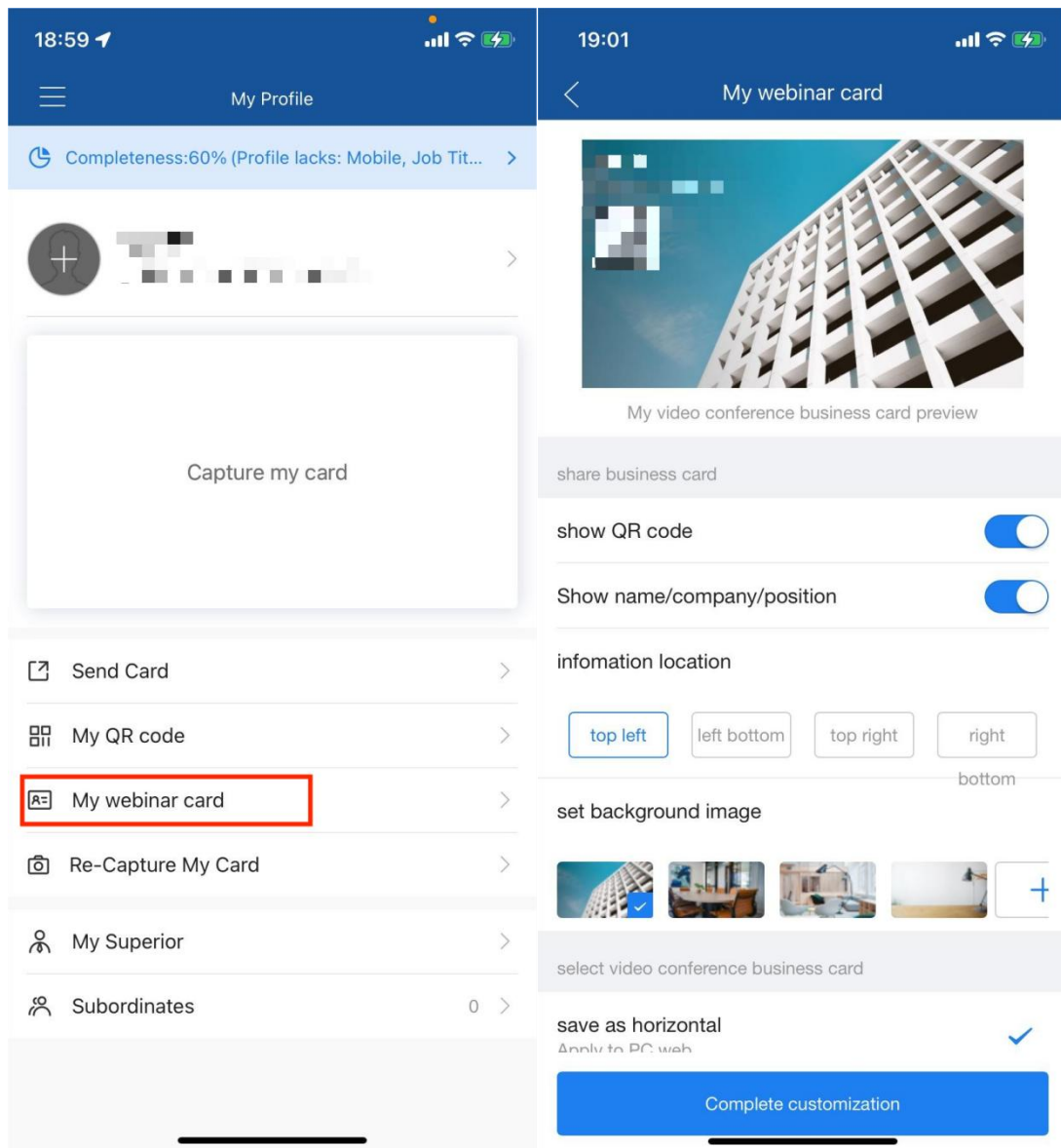
the Personal Center page, click "My QR code" to save the QR code business card.



My virtual meeting business card

- On the "Personal Center" page, click "My Virtual Meeting Business Card" to customize the meeting background.
- You can add "QR code", "name", "position", etc., adjust the placement, customize the background image, etc. Once the settings are complete, you can select the

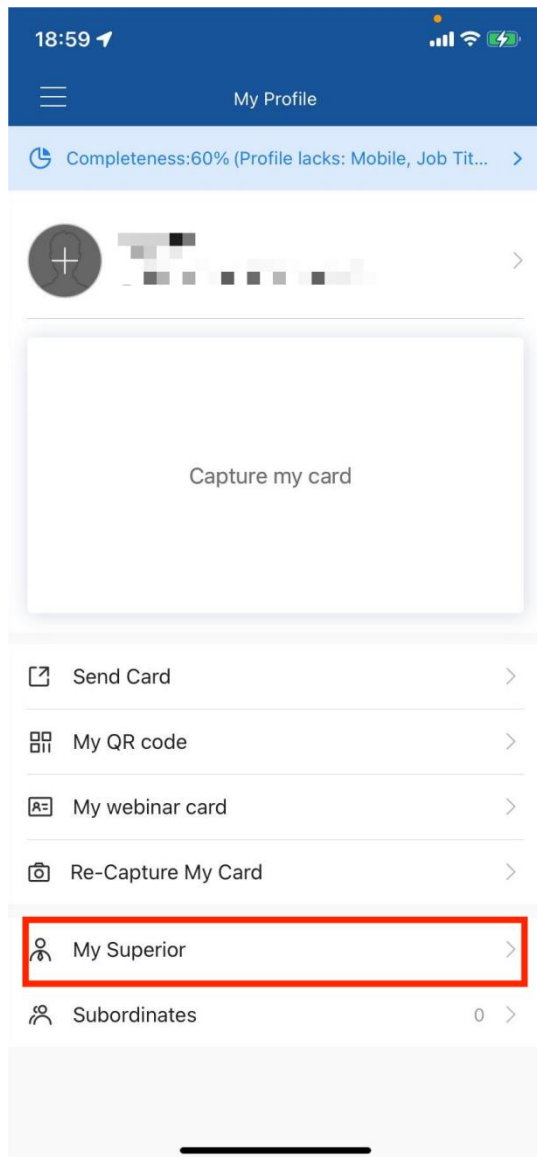
horizontal or vertical version and save it.



Set up a boss

For app:

- On the company card holder page, click the "My Boss" to set other colleagues who use CamCard Business to become your boss.

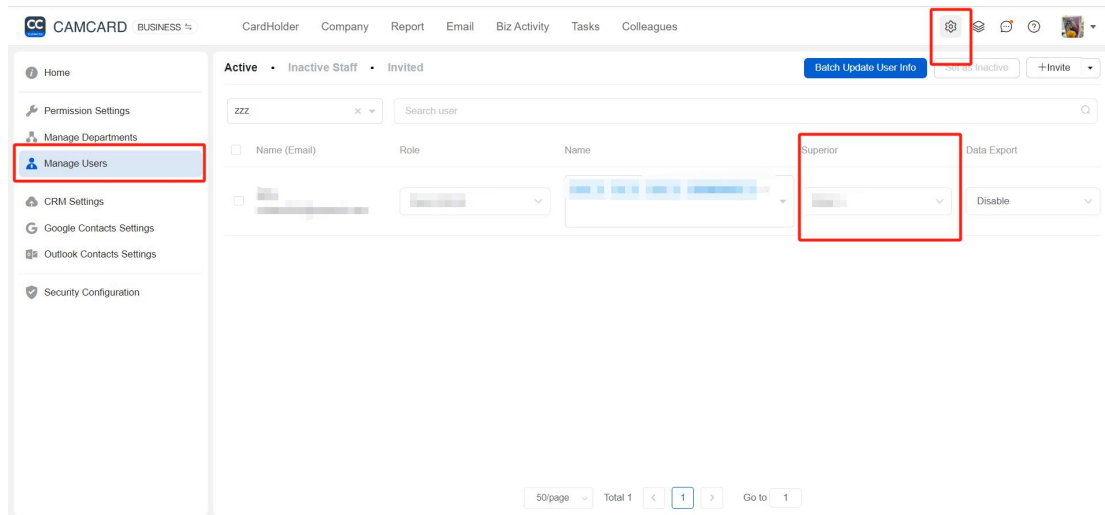


For PC:

- Visit b.camcard.com, log in to your CamCard Business account, and click the icon to set it up in "My Boss".

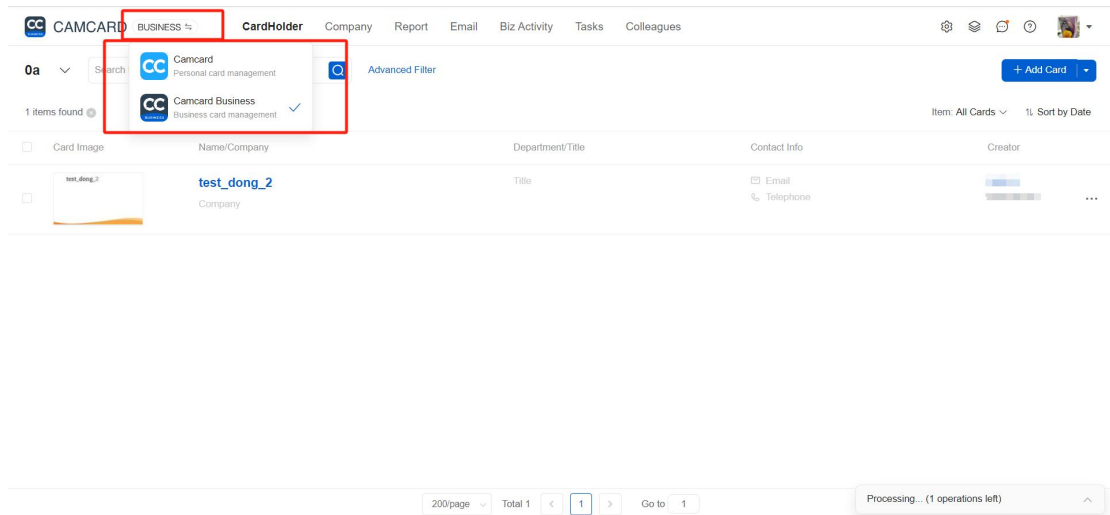
Admin settings

- Visit b.camcard.com, log in to your CamCard Business administrator account, and click the "Settings" button to set it up.



Personal business card holder

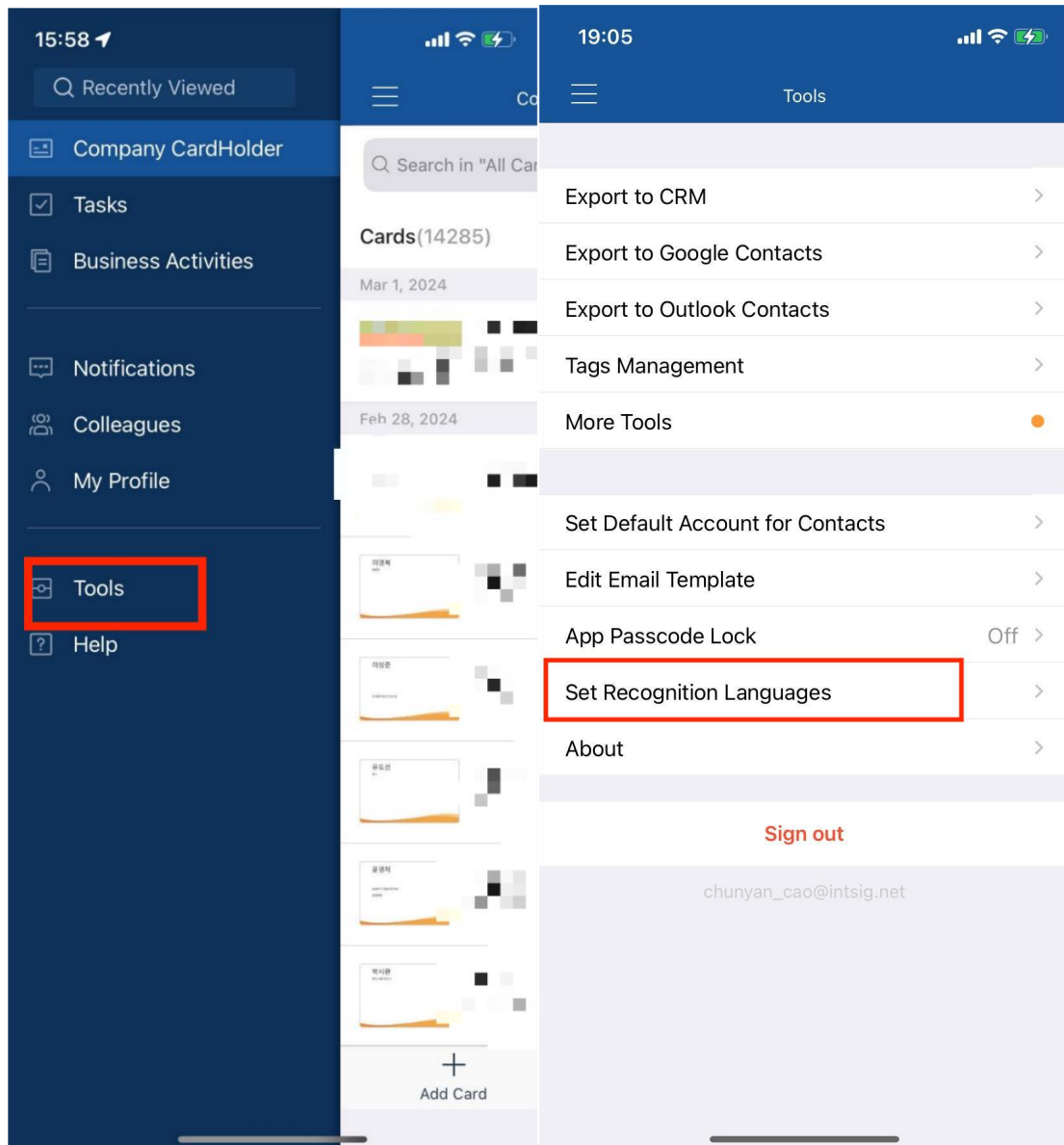
- Visit b.camcard.com, log in to your CamCard Business account, and click the down arrow to switch to CamCard Personal Edition.
- If you want to copy a business card from a private business card holder to a company business card holder, please refer to Chapter 1 "Importing Business Cards" – "From a Private Name." – "Clip copy business card".
- CamCard Personal account, even if the CamCard Business account package expires, you can still use the Personal account normally and safely to manage your private business card holder.



Others

Set the recognition language

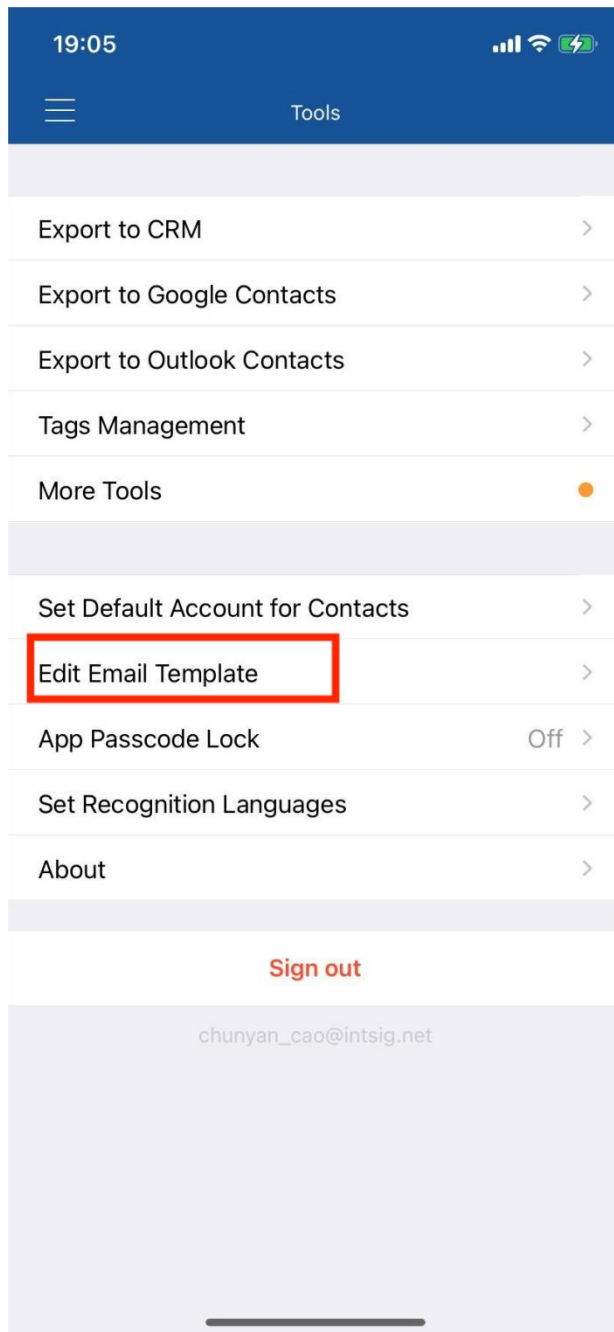
- Open CamCard Business app, click the menu button, click the "Toolbox" below, find "Select Recognition Language", and set it.
- Only the languages required for recognition are enabled, which is conducive to improving the recognition efficiency.



Email templates

Open CamCard Business app, tap the menu button, click "Toolbox", find "Set Email Template".

*Please be careful not to delete or replace characters such as [Name] and "Note" in the email. When you send an email to a contact, [Name] will automatically appear as the contact's name, and [Note] will display the notes added to the contact.



Contacts settings

Open CamCard Business app, click the menu button, and click "Toolbox" below. Find "Set default save account" and set it up.

19:05




Tools

Export to CRM >

Export to Google Contacts >

Export to Outlook Contacts >

Tags Management >

More Tools 

Set Default Account for Contacts >

Edit Email Template >

App Passcode Lock Off >

Set Recognition Languages >

About >

Sign out

chunyan_cao@intsig.net