CamCard Business

Administrator Guide

Contents

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 CardHolder

Cards added by CamCard personal version will be saved into Private CardHolder. Cards added by CamCard Business will be saved into both Private CardHolder and Company CardHolder automatically. Every user has his or her own Private CardHolder, which cannot be viewed by admins and superiors. However, the users can copy their cards to the Company CardHolder 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 CardHolder, and is able to manage the users' accounts, the company account and the company settings.

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 CardHolder, including cards added by themselves, cards added by their subordinates and cards shared with them or with their departments.

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 CardHolder.

Read-only-permission User：This role can view all cards in the Company CardHolder, 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 CardHolder.

2.4 Share

Users can share cards with colleagues or other departments from the Company CardHolder. 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 CardHolder.

3 GET STARTED

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

CamCard Business:

| Create a Company Account | → | Invite Colleagues | → | Add departments | → | Company-wide Sharing | → | Adding company tags |
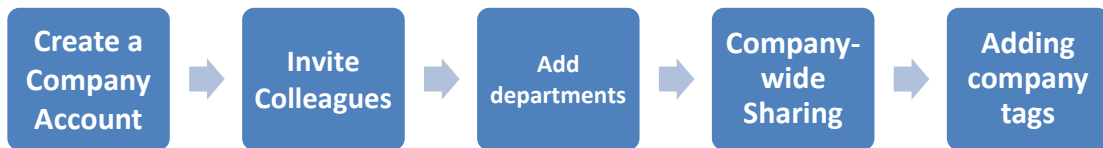
3.1 Create a Company Account

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.

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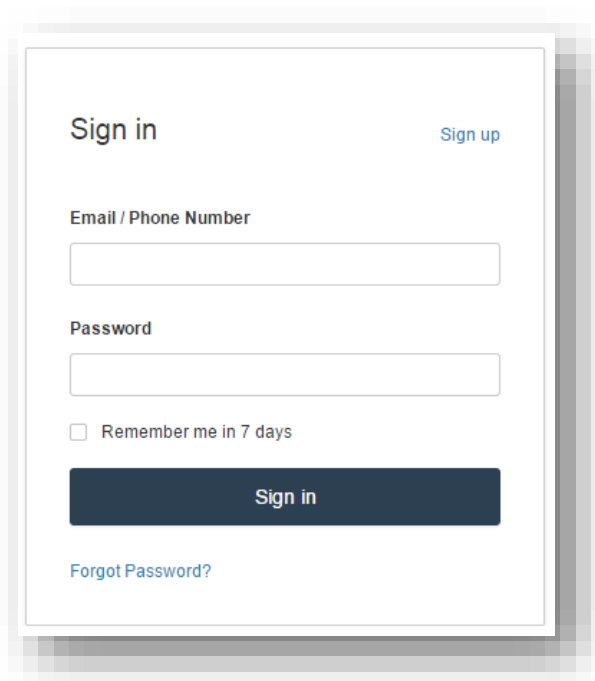
Your account will be the super admin of your company, you can use this account to sign in to both CamCard private app and CamCard Business. Your original cards in this account will be saved into your Private CardHolder, and you can copy any of the cards to your Company CardHolder as needed.

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 CardHolder as required.

Invite Colleagues	Add Department	Cards Sharing Rules	Add Company Tags

Invite Colleagues

Invite Colleagues via Email
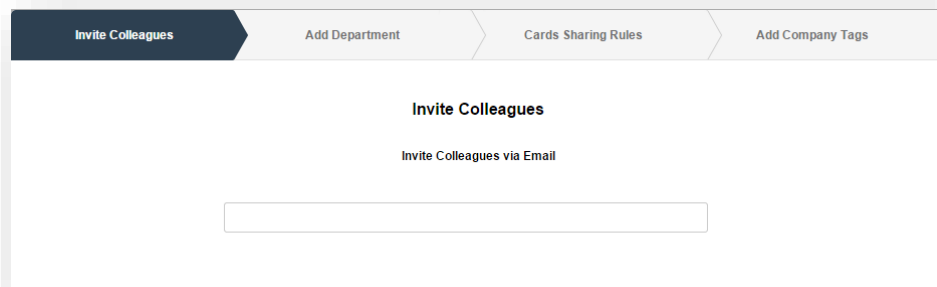
Super admin can also invite colleagues constantly on the settings page（For more information, please refer to 4.4 Manage Users）。

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
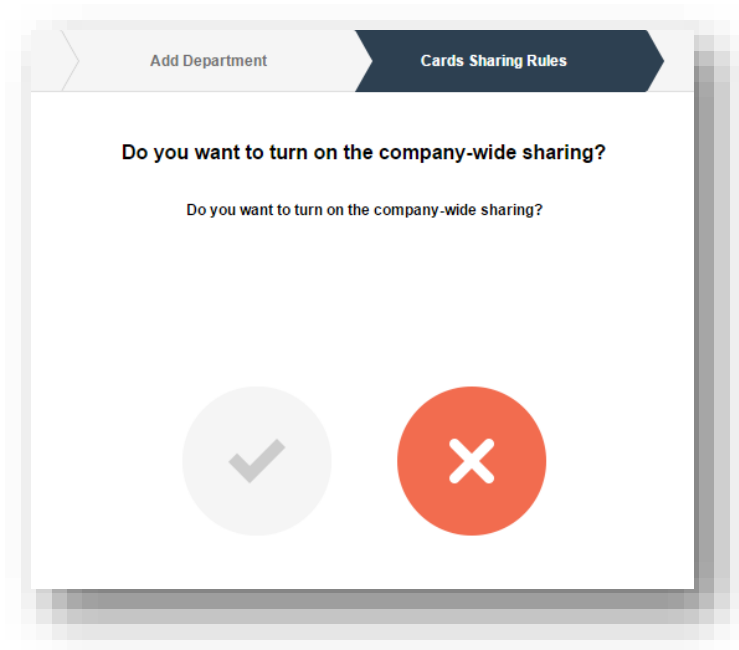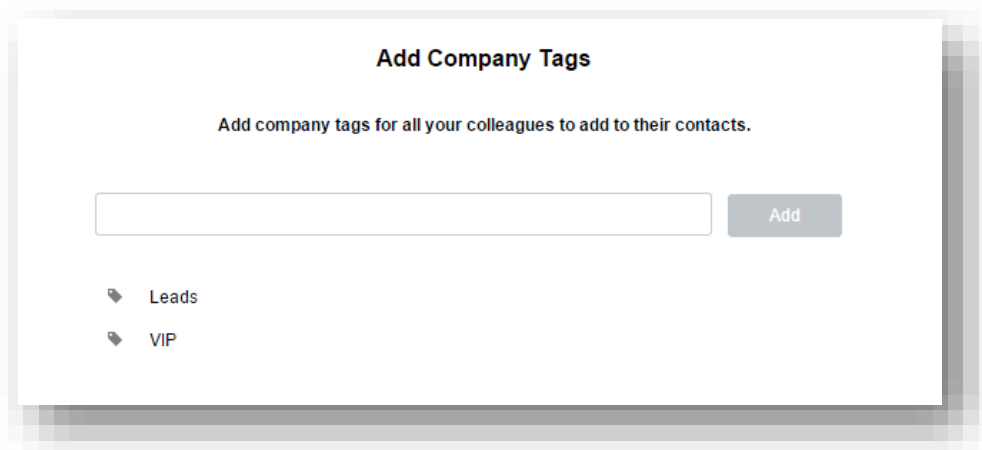

and card sharing rules.

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 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.
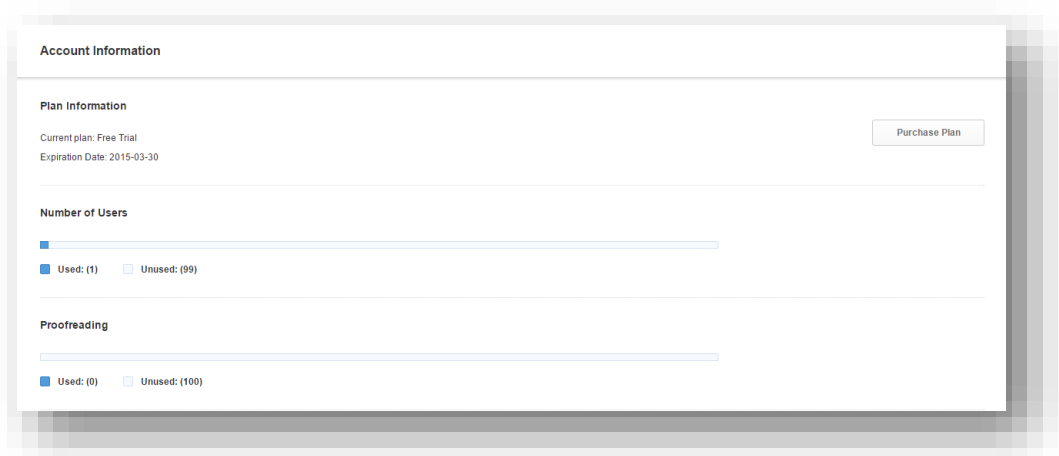
4.2 Sharing Settings

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.
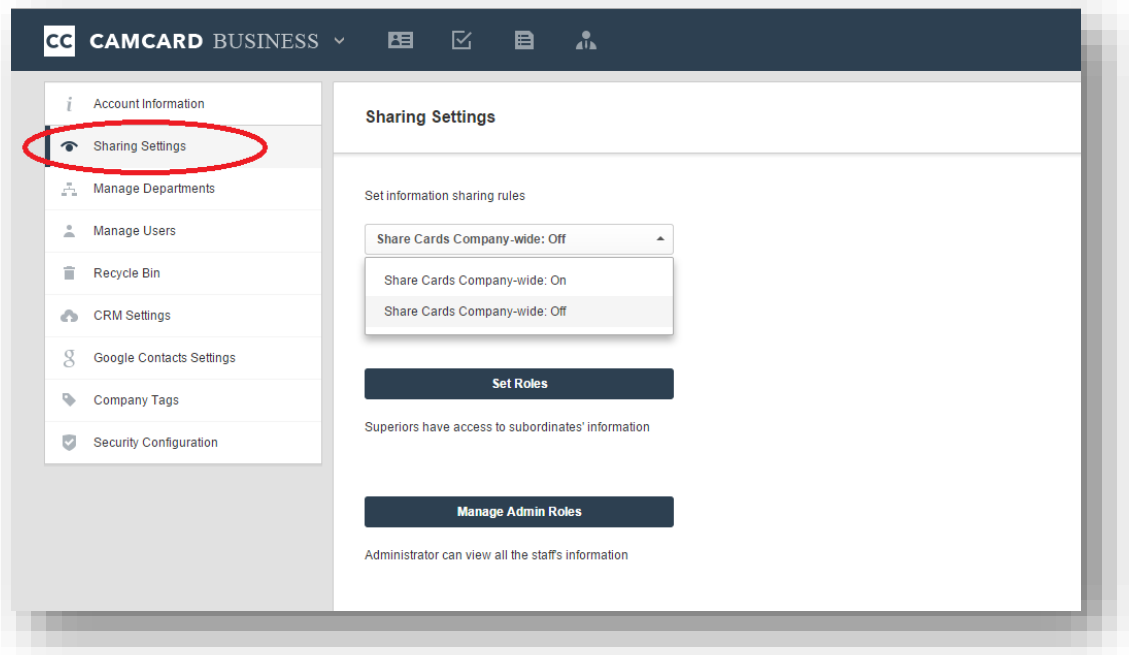
When the "Share Cards Company-wide" feature is on, all users of the company account can view and search the cards in the company CardHolder.

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.

4.3.1 Add Department

On the Manage Departments page, click the "Add Department" on the upper-right then you can add new departments. Please set a superior department for any new department added. Click "OK" when the adding is done.

4.3.2 Edit Department

Move the mouse pointer onto the department name to show an editing menu.

Click on "Change" to modify the superior department, department name and the

members. Click "OK" when the modification is done.

Sales
   Asia-Pacific
   Domestic
      East Area ⊕ Add Sub-department ✎ Change ⊖ Delete
      North Area
  Marketing

Edit Department

Superior Department

Domestic ▼

Name *

East Area

Members

Select members ▼

Share cards department-wide

Off ▼

Cancel   OK
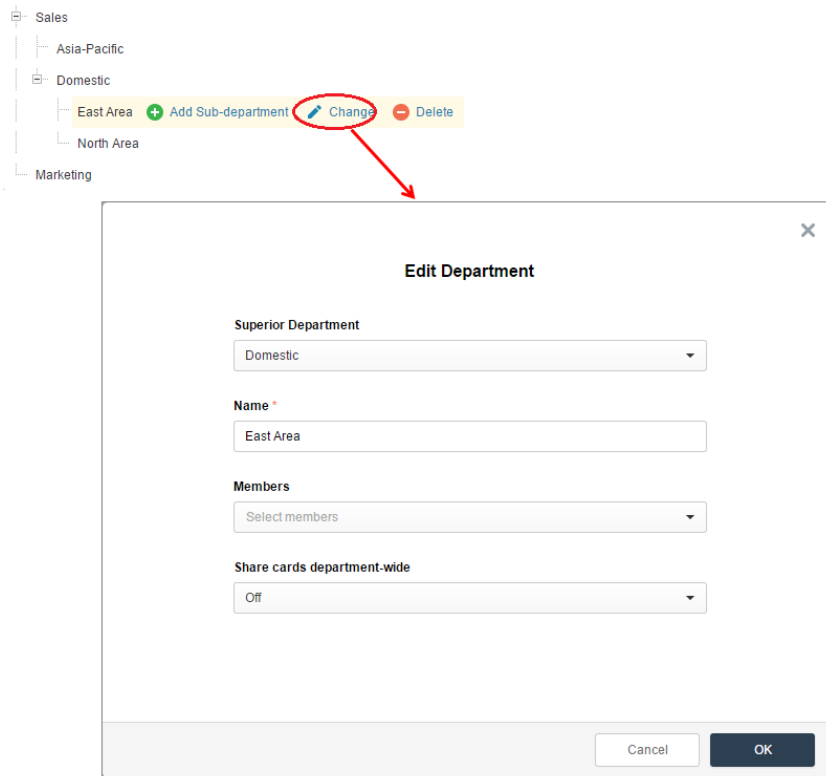
4.4 Manage Users

To manage users, please click on "Manage Users" on the left side of the settings page. 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.
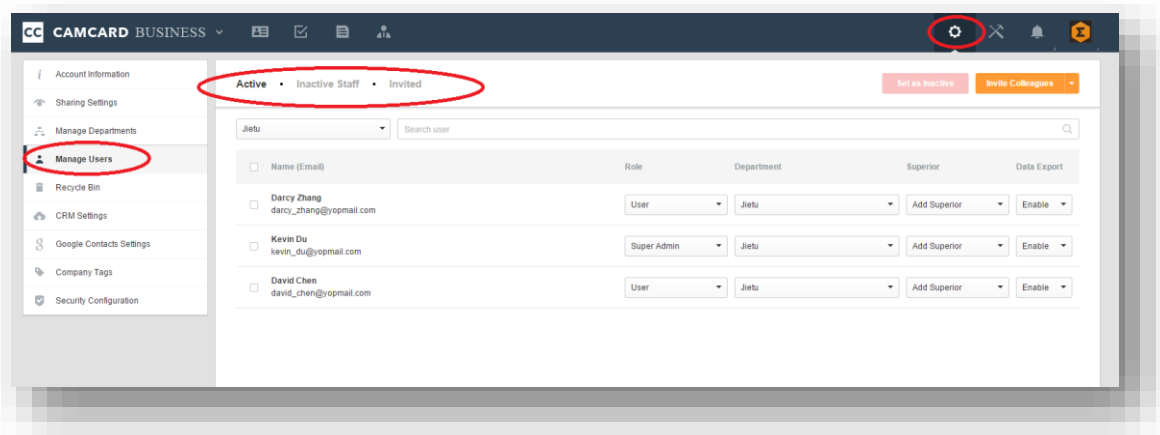
4.4.1 Active Staff

- Set superior：The superior can access any of the cards added by his or her subordinates in the Company CardHolder

- 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 CardHolder. However, cards added in the company CardHolder 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 CardHolder.

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 CardHolder.
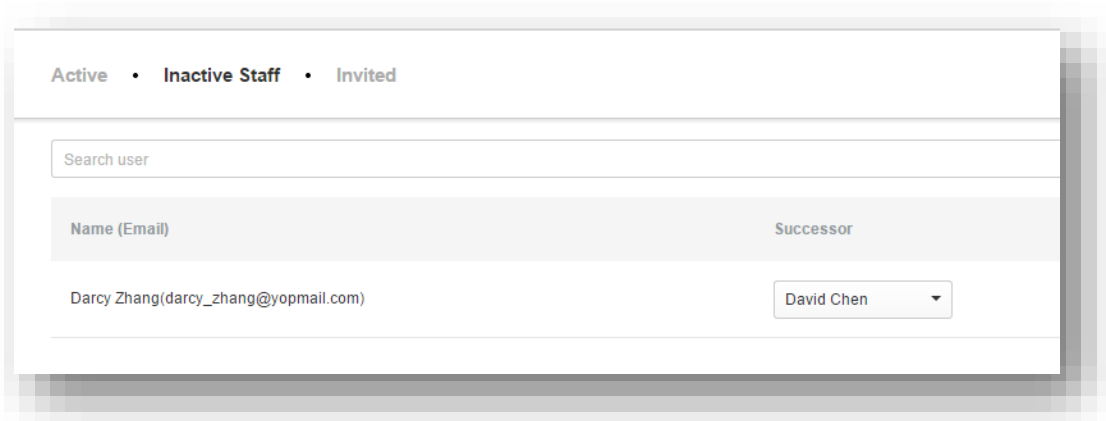

Please note：Once set, the successor cannot be modified.

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.
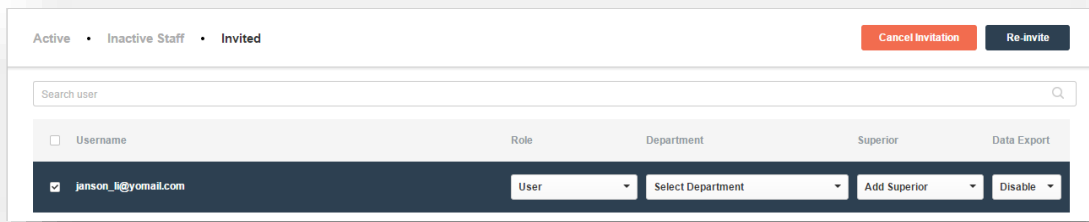
4.5 Recycle Bin

Cards deleted from the Company CardHolder will be automatically moved into the Recycle Bin. On the settings page, click on "Recycle Bin" on the left side then you can view or edit (permanently delete or recover) these cards.
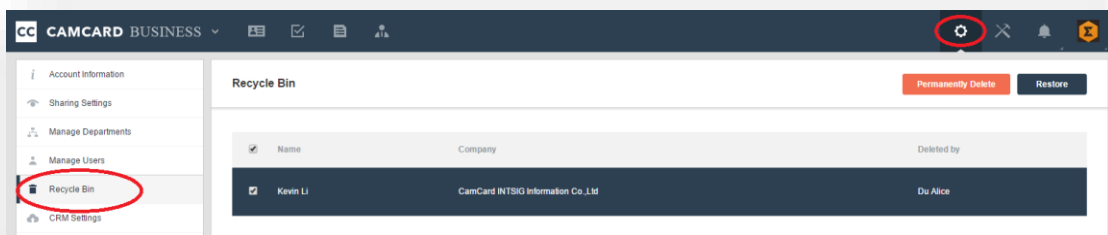
4.6 CRM Settings

If your company has been using Salesforce or SugarCRM, then you can use this feature to export cards into the CRM system as "leads"

On the settings page, click on "CRM Settings" on the left side to select a CRM system.
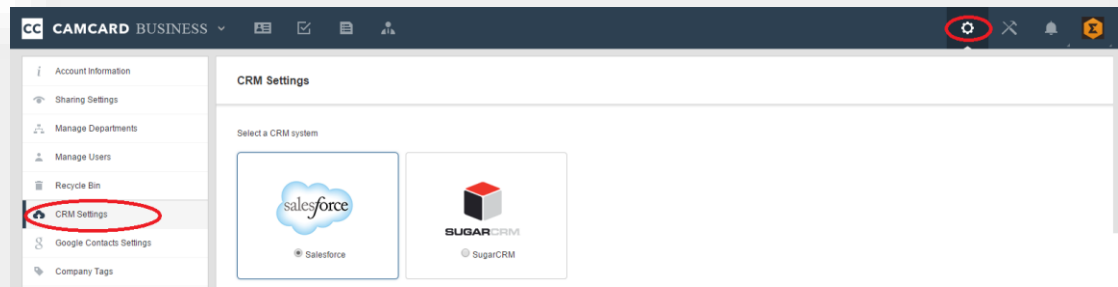
If you are using Salesforce, click next and the setting is done.

If you are using SugerCRM, please enter the SugarCRM server address and

account info to complete the settings.

Once the settings are done, staffs can export cards to CRM system through

Tools -> Export to CRM -> enter user name and password. 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.

4.7 Manage Company Tags

Super Admin can add, edit or delete company tags. All users can use any of the

tags set by the admin.
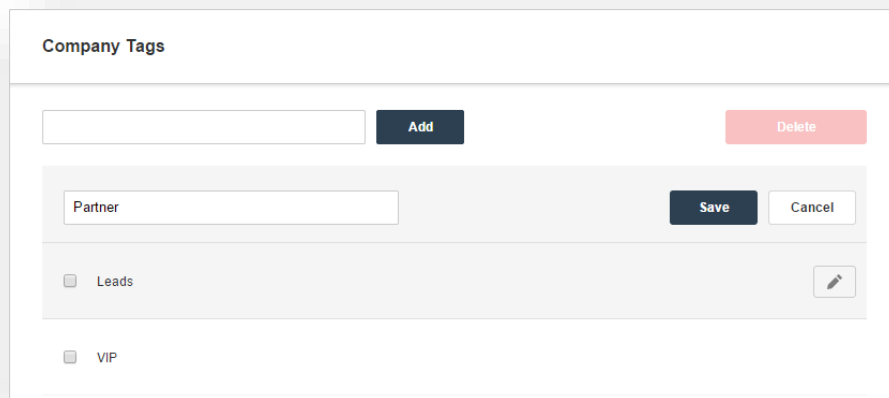
4.7.1 Add Company Tags

On the settings page, click the ''Company Tags'' on the left side to enter the

company tag management page. Enter a tag name in the blank and click ''Add' to
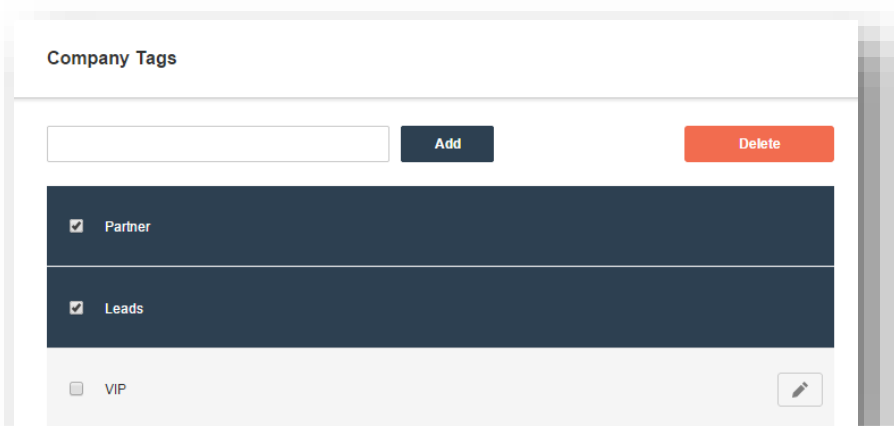
create a new tag.

4.7.2 Edit Company Tags

Move the mouse pointer onto any of the existing tags and click the edit icon on the right to edit the tag.

4.7.3 Delete Company Tags

Select the tags -> click on the upper-right button "Delete".

4.8 Security Configuration

On the settings page, by clicking on "Security Configuration", super admin can set allowed mobile devices or set a range of available IP addresses to access CamCard Business.

The IP restriction is only valid when visiting CamCard Business website at b.camcard.com.

The mobile device restriction is only valid when using the CamCard Business app.
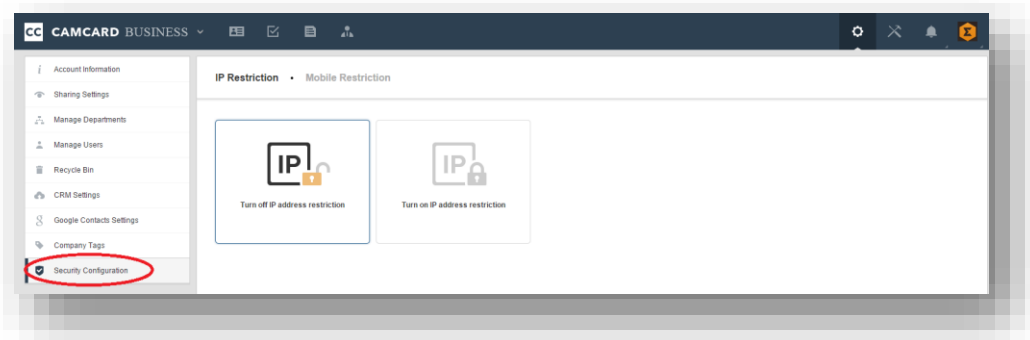
5 FURTHER QUESTIONS

If you have any further questions or suggestions, please contact us at vipsupport@intsig.com