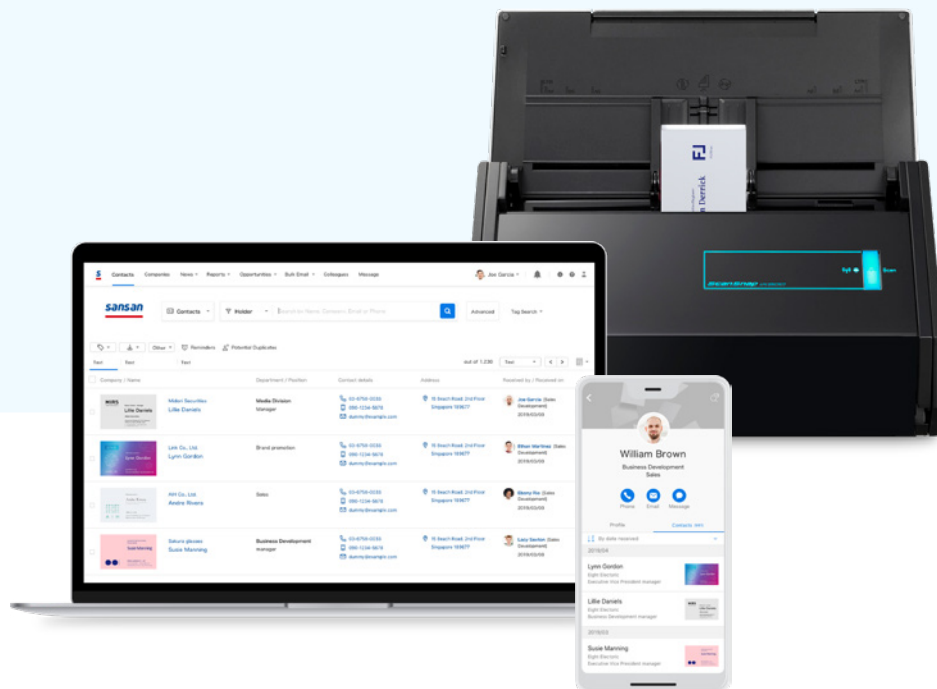


Getting started with Sansan



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Intro

What Sansan can do for you



Intro: What Sansan can do for you

What is Sansan?

Sansan is a cloud-based software solution that quickly and accurately digitizes all business cards within a company. The data forms a proprietary companywide database. Connections can now be shared for cooperative and powerful business results.

What you can achieve

Sansan's three main benefits will boost your company's growth:

1

Empower your sales staff

Take privately managed business cards out of desks and rolodexes and share them companywide. These contacts now become vital corporate assets for expanding sales.



2

Better productivity

Your most valuable cards/contacts can be managed as customer information. This helps you streamline your work processes and focus on the highest priority areas.



3

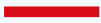
Move your digital transformation forward

Using Sansan is a huge step in advancing digital transformation in your company. You'll be able to uncover hidden connections in your data, integrate with other systems.



Step 1

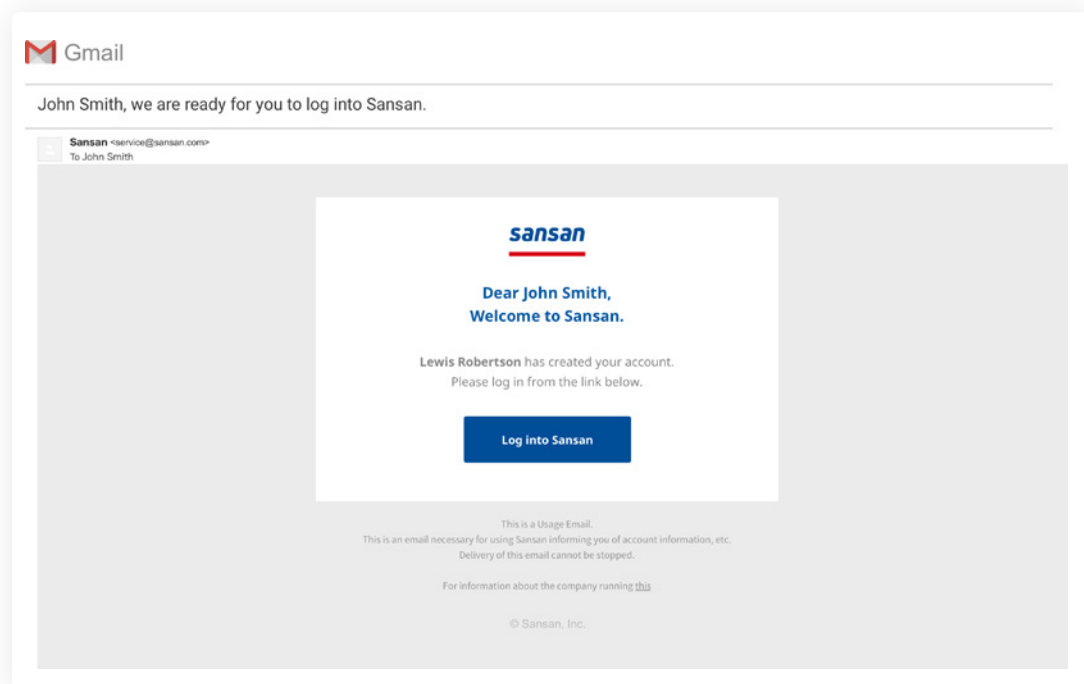
Logging in



Step 1: Logging in

Access email

System administrators issue accounts to all relevant users. Each user then receives an initial login mail, sent to their email address registered in Sansan.

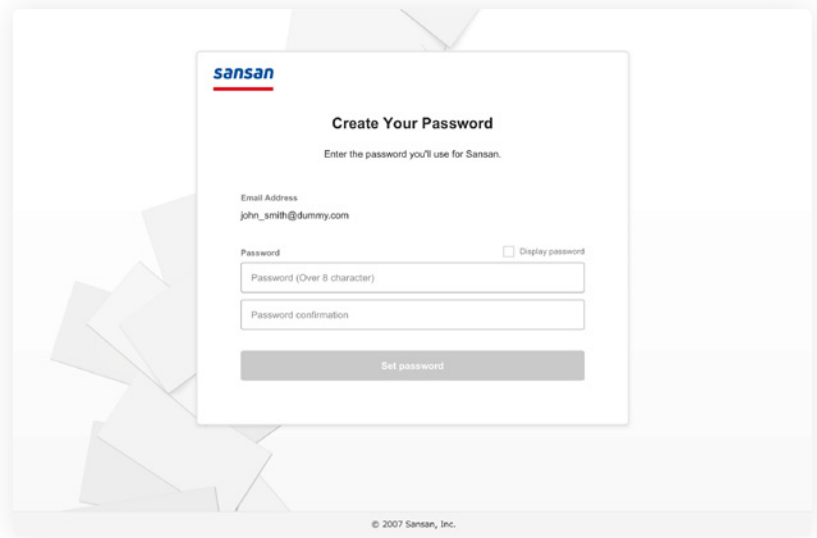


Step 1: Logging in

Setting your password

1

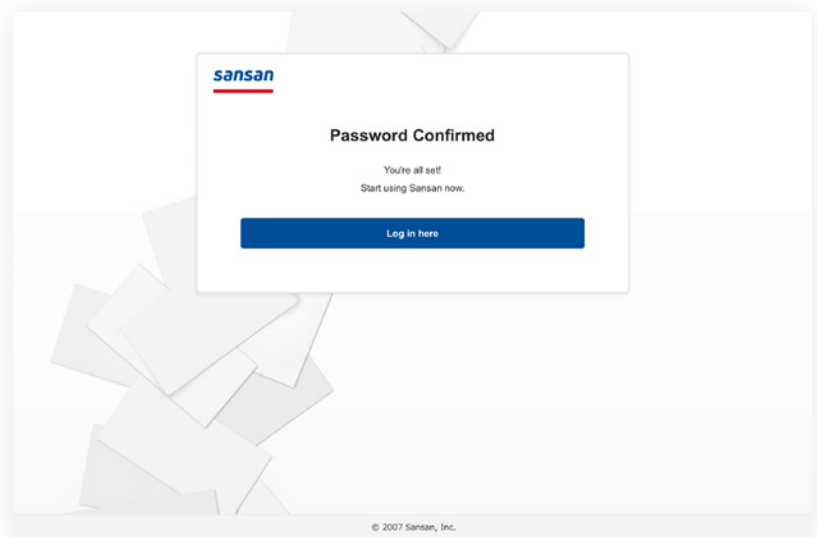
Enter a password.



The screenshot shows a web browser window with the Sansan logo in the top left. The main heading is "Create Your Password" with a subtext "Enter the password you'll use for Sansan." Below this, the "Email Address" field is pre-filled with "john_smith@dummy.com". The "Password" field has a placeholder "Password (Over 8 character)" and a "Display password" checkbox. A "Password confirmation" field is located below the password field. A "Set password" button is at the bottom of the form. The footer of the browser window shows "© 2007 Sansan, Inc."

2

Click the button to log in.



The screenshot shows a web browser window with the Sansan logo in the top left. The main heading is "Password Confirmed" with a subtext "You're all set! Start using Sansan now." Below this is a blue "Log in here" button. The footer of the browser window shows "© 2007 Sansan, Inc."

Password requirements

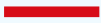
- You must use at least 8 characters
- Use a combination of letters, numbers, and symbols
- Make sure it's unique and don't share it with others

If you forget your password

- 1 Request a password reset
- 2 Check for the reset email, then follow the steps within it
- 3 Log back in

Step 2

Initial settings



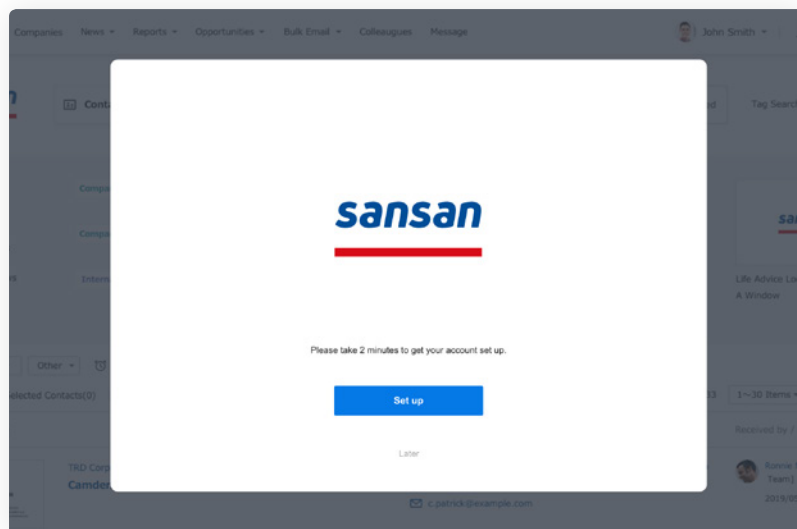
Step 2: Initial settings

Setting up Sansan to meet your needs

When you're logged in to Sansan, you can set it up based on how you'll be using it.

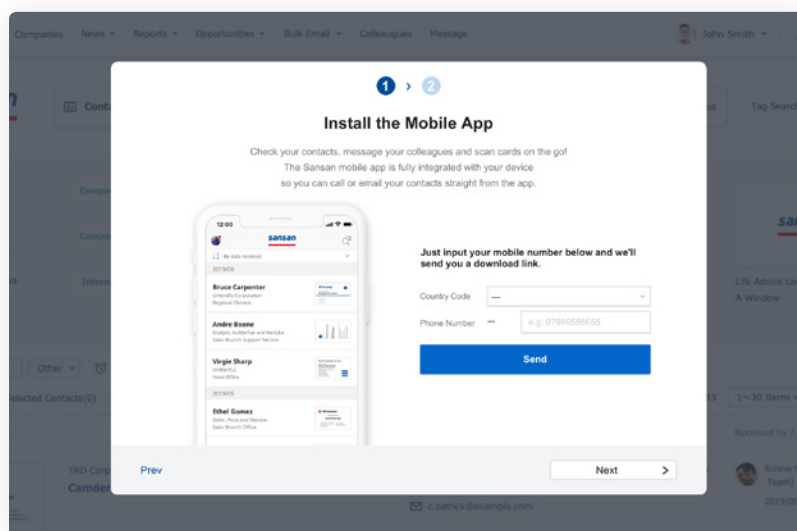
1

Click on the button to start the setup.



2

Enter your phone number, and click "Send" to receive an SMS link to the Mobile App.



The Sansan Mobile App

The Mobile App gives you added ability to scan cards and check your contacts anywhere, anytime.



Open App Store (iOS) or
Google Play (Android)

sansan

Search for "Sansan"



Install the app

*See details in Section 6 →

Step 2: Initial settings

3

Now choose your default email client that you'll use in Sansan. And enter your email signature (optional).

The screenshot shows a 'Set up your email' dialog box with two steps. Step 1 is 'Please choose what type of email software you are using.' with three radio button options: 'Client email software' (selected), 'Gmail, G Suite', and 'Office 365'. Step 2 is 'Please input the signature you would like to use.' with a text input field. The dialog has 'Prev' and 'Next' buttons at the bottom.

1 > 2

Set up your email

This will allow you to email your contacts straight from Sansan using your usual work email address.

1 Please choose what type of email software you are using.

- ☒ Client email software For example: Outlook, Outlook Express, Windows Live mail
- ☐ Gmail, G Suite
- ☐ Office 365
- ☐ Other web-based email software

2 Please input the signature you would like to use.

Please input your signature (optional)

Prev Next >

4

When the setup is done, click on the button to start using Sansan.

The screenshot shows a 'You have completed the initial settings' dialog box. It features an illustration of a laptop, a smartphone, and a printer. Below the illustration, it says 'Sansan, where business starts.' and 'You no longer need to spend time or effort organizing your business card.' At the bottom, there is a 'Getting Started' button.

You have completed the initial settings

Sansan, where business starts.

You no longer need to spend time or effort organizing your business card.

Prev Getting Started

Step 3

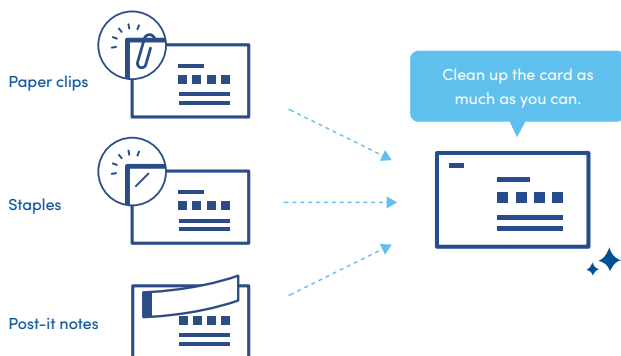
Scanning business cards



Step 3: Scanning business cards

Before you start scanning

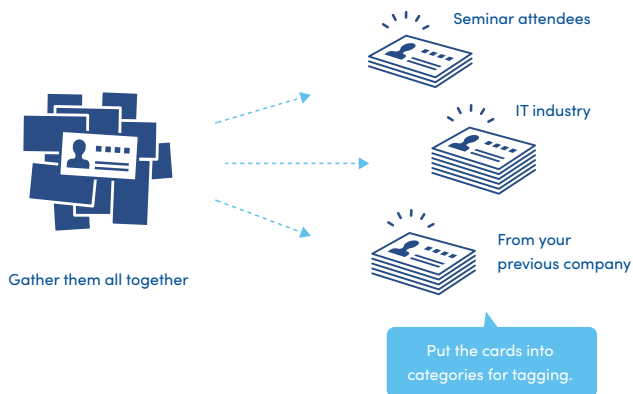
It's time to start digitizing your business cards. First you'll need to find all the cards you want to scan, and prepare them for scanning.



1

Remove paper clips, etc.

Take all your cards out of their cases, boxes, rolodexes, etc. Then remove any paper clips, staples, post-it notes, and anything else that will get in the way of the scan.



2

Gather up all your cards for scanning, then group them

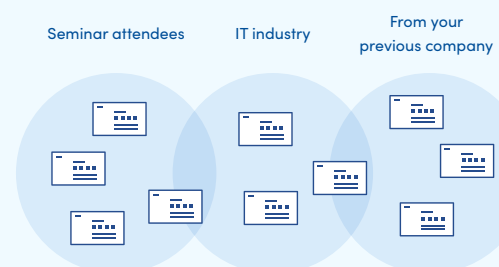
If your Sansan administrator has set rules for tagging cards, separate the cards into those categories. If not, you can still tag them later.

Using tags for easy, convenient sorting

The Sansan tag function lets you groups and manage your card-based contacts. This enables more effective targeting and management of groups with common attributes.

More details on tags here:

<https://jp-help.sansan.com/hc/en-us/articles/206508377-Attaching-Tags-to-Business-Cards>



Step 3: Scanning business cards

Your first scans

Start with business cards you've accumulated up until now.

1

Set the business card in the dedicated Sansan Scanner.



Sansan Scanner

2

Choose the department and user name, and click "Scan".

A screenshot of the Sansan web interface. The interface is dark-themed with a top navigation bar containing the Sansan logo, a home icon, a search bar labeled 'Search Users', and icons for Backlog, Menu, Sync, Help, and Power. Below the navigation bar, there is a table with two columns: 'Department' and 'Name'. The 'Department' column has a dropdown menu currently showing 'Sales Branch'. The 'Name' column displays a grid of user names with their initials. To the right of the table, there is a 'Date Received' section with 'Unsure' selected, and buttons for 'Prev.', 'Today', and 'Next'. Below this, there are checkboxes for 'Unsure' and 'Date written on card'. Further down, there is a 'Language' section with 'English' and 'Other' buttons, and an 'Option' section with 'Add Tag' and 'Other' buttons. At the bottom right, there is a large yellow 'Scan' button. A green 'Connected' status indicator is visible in the bottom left corner.

How long does it take?

If you scan up to 20 cards in a day, they will be digitized by the next business day. If you scan more than 20 cards in a day, 20 chosen at random will be converted by the next business day, with digitization fully completed the following day.

Step 3: Scanning business cards

Scanning non-English business cards

Sansan's not limited to English. The system accurately recognizes business card data from many of the world's major languages.

1

Choose the language for transcription.

The screenshot shows the Sansan interface with a sidebar on the left containing a list of departments: Sales Branch Office, Data Strategy & Operation Center, Sales Branch, Sales Branch Support Section, Field, Sales Branch Office, and Fleet Sales Team. The main area displays a grid of business card data. A language selection modal is open in the center, showing a grid of language options: Japanese, English, Chinese, Korean, German, French, Spanish, Portuguese, Thai, and Indonesian. The 'Other' button in the bottom right of the modal is circled in blue. The top right of the interface shows the date received as 2019/9/10 (Tue) and buttons for Prev., Today, and Next. There are also checkboxes for 'Unsure' and 'Date written on card', and buttons for 'Add Tag' and 'Other'.

2

Click "Scan" to start the scan and digitization.

The screenshot shows the Sansan interface with the same sidebar and data grid as the previous step. The language selection modal is no longer visible. The 'Scan' button at the bottom right of the interface is circled in blue. The top right of the interface shows the date received as 'Unsure' and buttons for Prev., Today, and Next. There are also checkboxes for 'Unsure' and 'Date written on card', and buttons for 'Add Tag' and 'Other'.

Digitize cards in multiple languages

Sansan can digitize cards in 10 languages:
English, Japanese, Chinese (simplified and traditional), Korean,
German, French, Spanish Portuguese, Thai, Indonesian



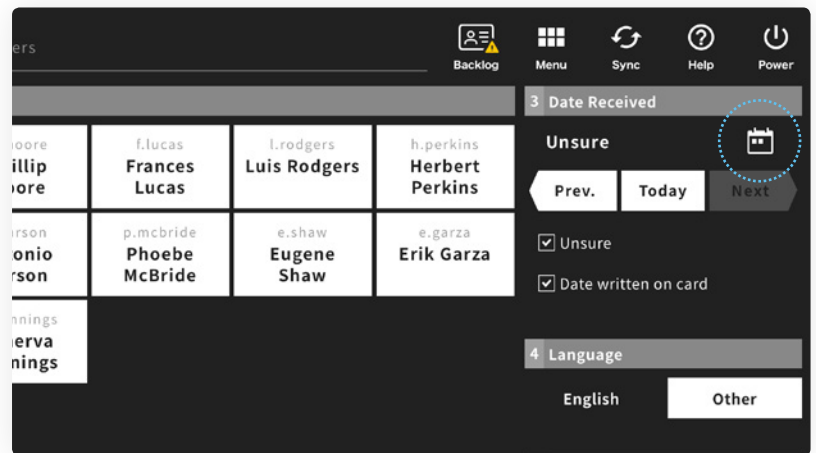
Step 3: Scanning business cards

Setting the card exchange date

The default date for a card will be the date you're scanning it in. But if you're putting in previously acquired cards, it's best to put the actual date you received it. This will help you better track the contact history.

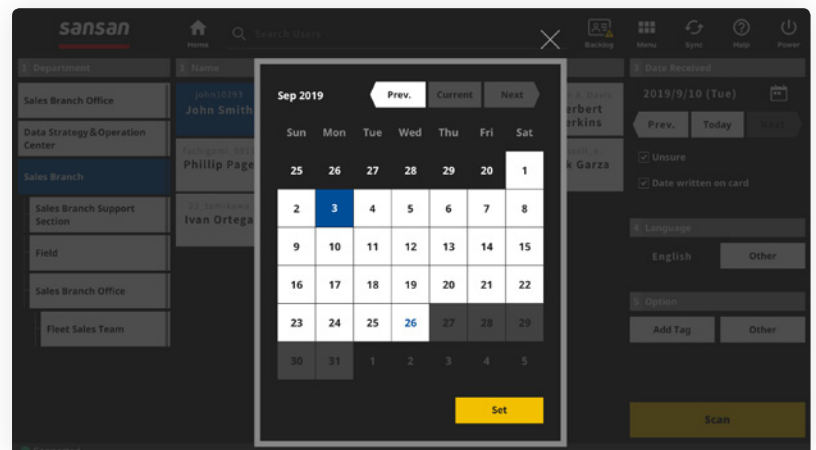
1

Tap the calendar icon to adjust the date.



2

Select the date you received the card.



Don't know when you got the card?

If you're not sure/don't remember when you acquired the card, be sure to select this in the options. You can also choose to use a date handwritten on the card.

*Please note that handwritten notes are harder for the system to read, and we can't ensure the scanning accuracy.

- ☒ Unsure
- ☒ Date written on card

Step 3: Scanning business cards

Scanning FAQ

These are some common queries from new Sansan users.
They're easily resolved. Here's how.

1 Do cards need to be placed in the scanner in a specific direction?

No, you can put them in vertically or horizontally, front or back. Sansan's AI will automatically determine the contents.

2 Are cards digitized in the order they are scanned?

Not necessarily. This is because of factors such as complexity and amount of processing needed.

3 How should I scan cards that are in unusual sizes or shapes?

Use the special scanning case we provide for this purpose.

4 What exchange date is recorded for cards in the first scan when using Sansan?

You can select the date manually, or set the date as unknown.

5 What if the front and back are in different languages?

When digitizing one side, the language is automatically recognized, but digitizing both sides will require manual language selection.

6 Are costs different for scanning two-sided cards?

If you choose to fully digitize both sides of a card, the cost is double, since twice the processing is required.

When you have digitized customer info

If you have customer information in data format, and not on business cards, you can also import this into Sansan. Users with administrator permissions can do this if the data is in CSV format.

To see how to import data, please check this help page:
<https://jp-help.sansan.com/hc/en-us/articles/206509257-Importing-Business-Card-Data>

There is no additional charge for this function, and up to 10,000 items can be imported at one time. Please note that business card images cannot be imported, as cards need to be scanned and digitized in Sansan's own format.

Step 4

Searching and using contact information

Step 4: Searching and using contact information

Searching your data

From the search box on the Sansan home screen, you can quickly find a contact or company.

Home screen

1. Search in your own data

2. Enter a person's or company's name

3. Click the search button

From the icon at the bottom right of the card image, you can copy card info and share it with colleagues

Your email client will open automatically when you click on the email address.

Message screen

Email screen (if using Gmail)

If set in the initial settings, customer information will be automatically entered.

Sending messages to colleagues

You can easily get in touch with your colleagues when you want to ask for more information about someone's contact.

Sending emails to customers

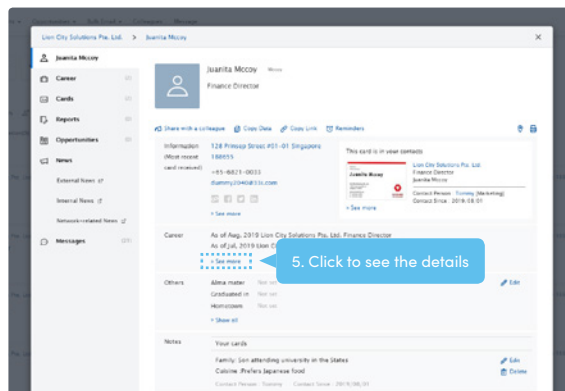
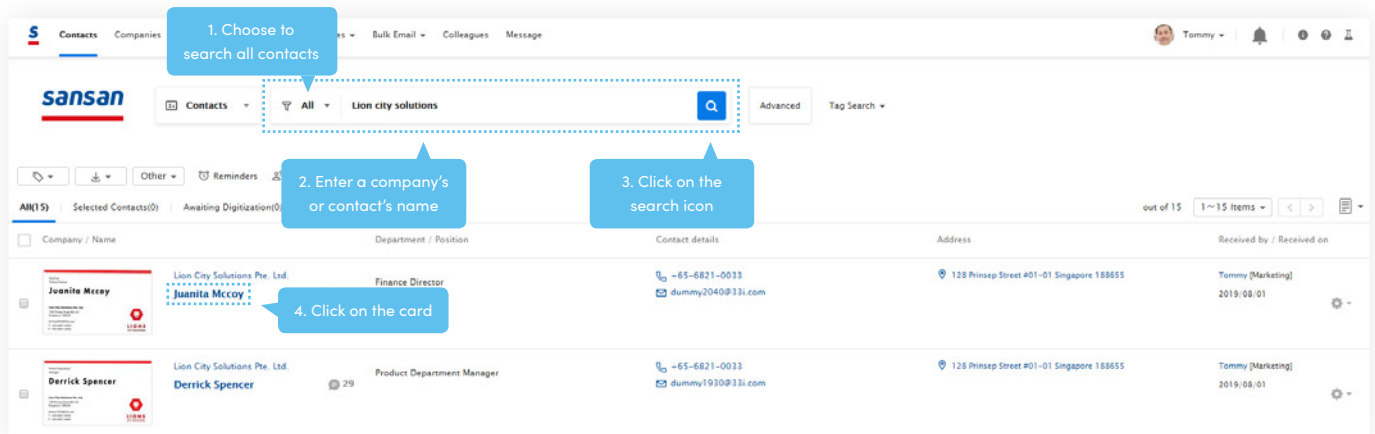
The email option automatically opens your default email client and ensures that accurate information is entered.

Step 4: Searching and using contact information

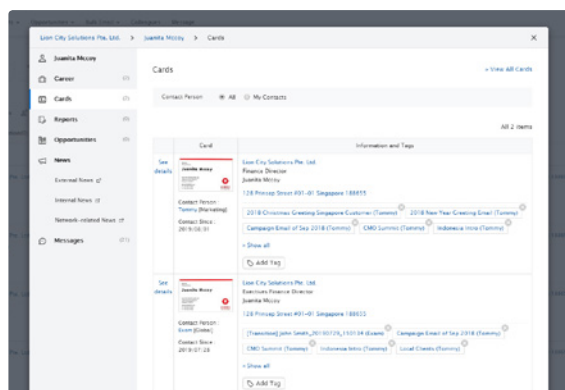
Searching companywide data

From the main search field in Sansan you can also search for contact information across your entire company.

Home screen



Person details screen



Career screen

1

View a detailed profile of a specific contact

By viewing a contact's details, you can see all companywide information on them. This includes who they exchanged cards with and their history of interactions.

2

See the contact points

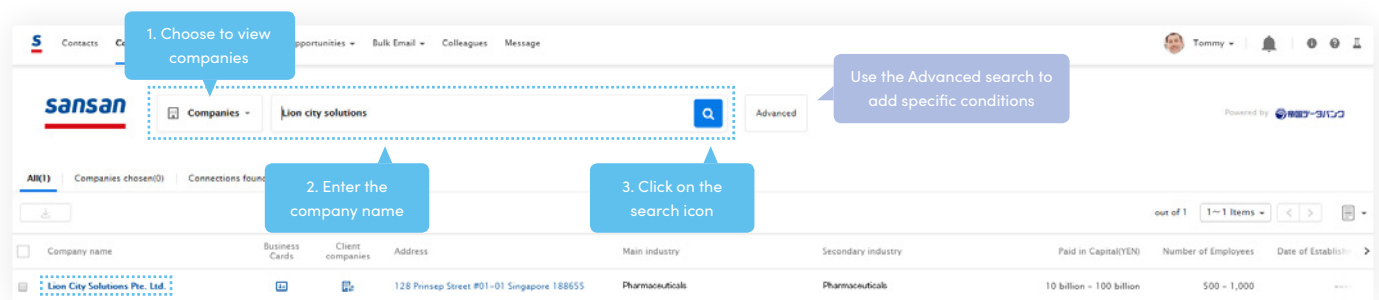
You can view the card exchange history within your company, who's exchanged cards with whom, and simple career histories.

Step 4: Searching and using contact information

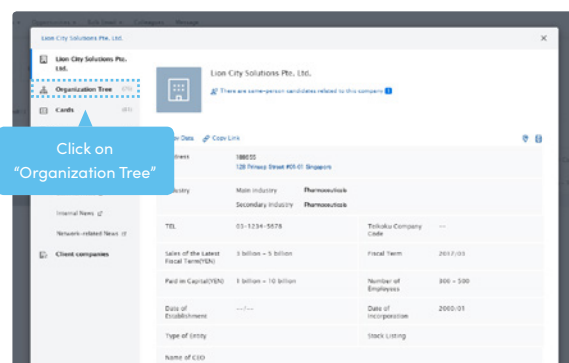
Searching company information, browsing internal connections

Search your company's Sansan database to see who is connected with which clients. This is a valuable backlog and starting point for new opportunities.

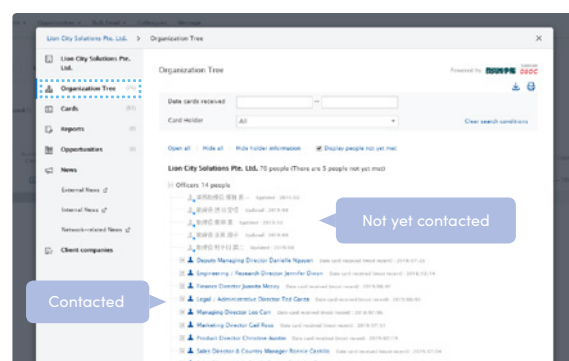
Home screen



4. Click on the company name



Company master screen



Organization Tree screen

1 See all information associated with a company

Click on a company name and go to the company master screen to view basic company information and specifics such as business results.

2 See a company's employees

In the organization tree, you can see key people who have and have not been contacted. This is a great place to start your approach strategy.

Full functionality is country/company dependent.

Step 5

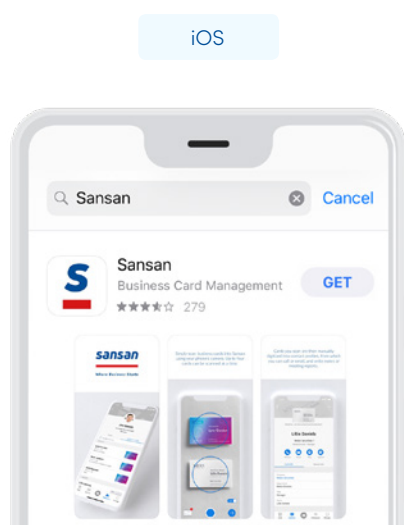
Using the Mobile App



Step 5: Using the Mobile App

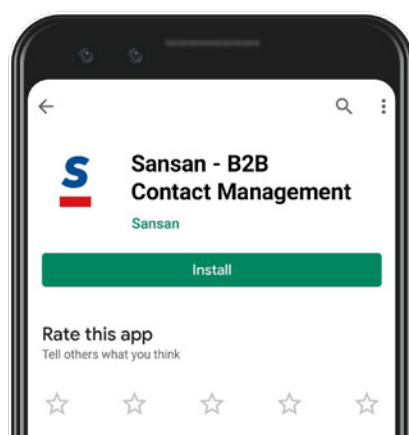
Installing the app

Search for “Sansan” in the App Store (iOS) or Google Play (Android) to find and download the Sansan Mobile App. The app lets you access your contacts and other Sansan functions from your mobile device at any time, anywhere.



App Store

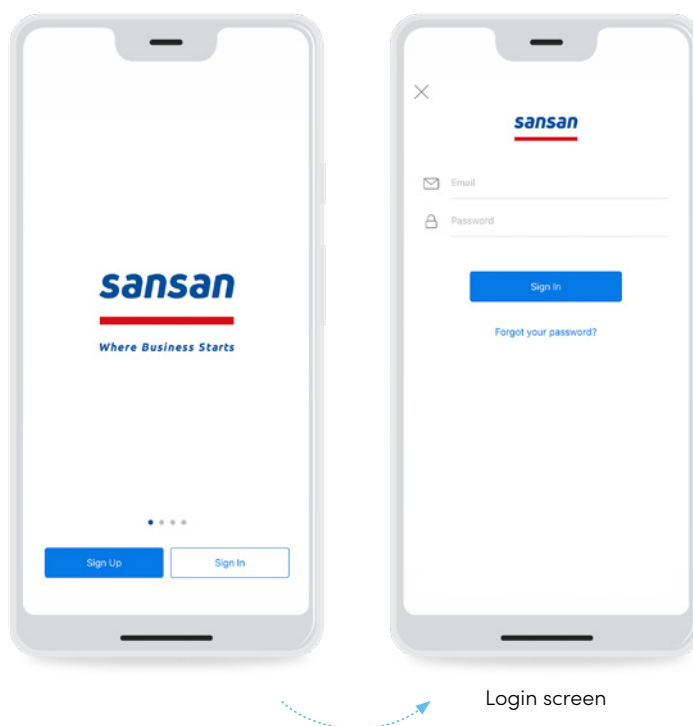
Android



Google Play

Logging in

When you open the app, log in with the same email address and password that you set up on the Sansan Web App.



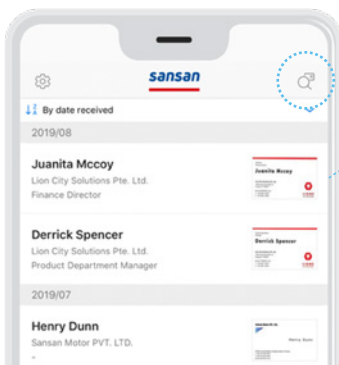
Login screen

Step 5: Using the Mobile App

Searching contacts

1

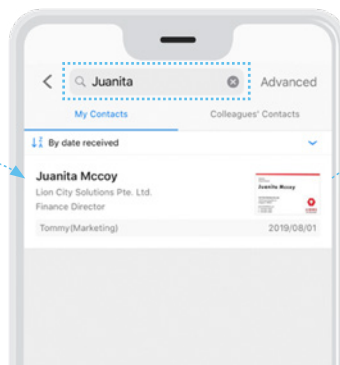
Tap the search icon in the top right.



Home screen

2

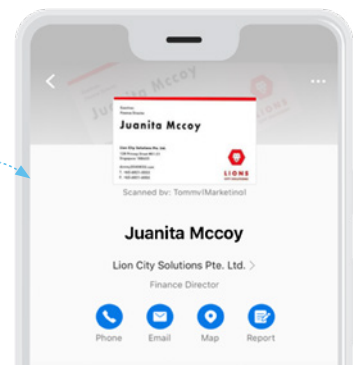
Enter the contact's name or company name, then tap on the contact.



Search screen

3

The profile screen gives quick access to the call, email, map, and report functions.

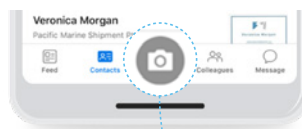


Profile screen

Scanning cards

The app is a portable companion on business trips. When scanning in a new card, you can add notes to help you keep track.

To start a scan, click on the camera icon at the bottom middle of your screen.



Scanning screen

Business card auto-recognition

When you turn on automatic card recognition, multiple cards will be detected automatically. Turn the function off to scan your cards individually. You can also use double sided scanning and digitization.

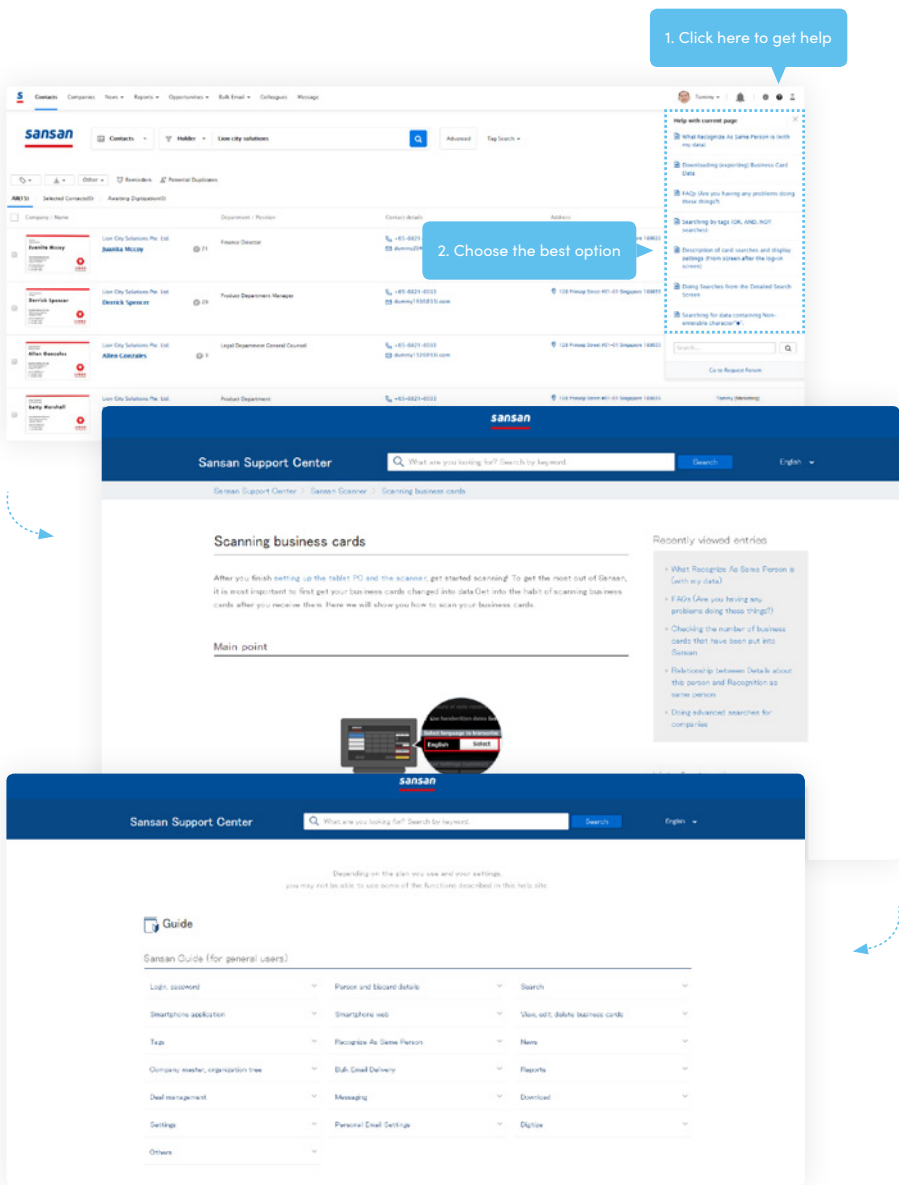
Step 6

Getting support

Step 6: Getting support

If you don't understand the functions

The Sansan Support Center is available to answer most questions on using the system.



Sansan Support Center homepage

1

Access the help function at the top right of your Sansan screen.

2

In the Sansan Support Center you'll find answers to a huge range of common and specific questions on most all aspects of the system.

3

Frequently asked questions are categorized for general users and for system administrators.

Step 6: Getting support

If you still need help

If you've checked our online support and you're still having difficulties, or if you have more specific questions, you can use the contact form.

The top screenshot shows the Sansan Support Center homepage. It has a blue header with the Sansan logo and a search bar. Below the header, there's a section for 'Internal News' and a 'Contact form' button highlighted in a dashed blue box. The bottom screenshot shows the 'Contact form' page. It has a blue header with the Sansan logo and a search bar. Below the header, there's a 'Contact form' section with fields for 'Your email address', 'Subject', and 'Description'. To the right of the form, there's a 'Which items are necessary' section and a 'List of categories' section.

Contact form

Your email address *

Subject *

Please see the relevant topics that are displayed:
The customer power goes out (Our goal: Sansan Good)

Description *

Which items are necessary

Items with "*" next to them are necessary. Please make sure they are filled in.

List of categories

- Sansan Guide (for general users)
- Sansan Guide (for administrators)
- Trouble Shooting and Tip for Advanced Usage
- Sansan Practical Guide

Sansan Support Center contact form

1

Scroll down to the contact form button and click it.

2

Enter the required fields. Please be as specific as possible.

We hope you get the best out of Sansan.
We're here to support you on your path to success.

sansan
