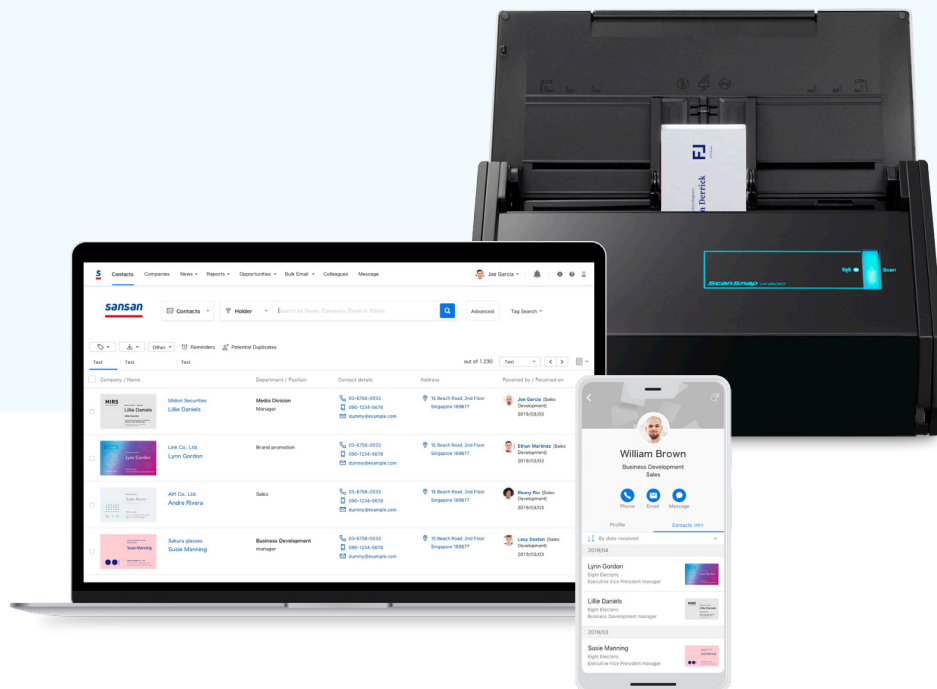


Sansan Administrator Guide

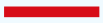


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Step 1

Preparing business cards for scanning



Step 1: Preparing business cards for scanning

Get the cards ready

Sansan brings together all business cards owned within your company, creating a contact database that becomes an invaluable corporate asset. You'll get the best out of Sansan if you scan in as many cards as possible at the beginning. This requires all users locating and presenting all their cards so they can be quickly scanned. Here's how to get your cards ready so you can start getting results as soon as possible.

1

Remove all the cards from files, folders, etc.

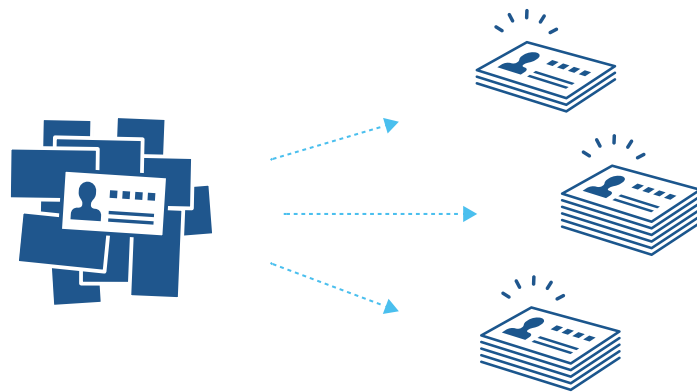
Speed up the process and by taking all cards out of their containers and removing any staples, paper clips, or anything attached to them.

2

Categorize them by type

If you plan to categorize cards using tags, arrange the cards accordingly.

*You can also add tags after digitizing the cards.



Grouping the cards by category will make the scanning and digitization process more effective.

Step 2

Logging in as an administrator

Step 2: Logging in as an administrator

Login information email

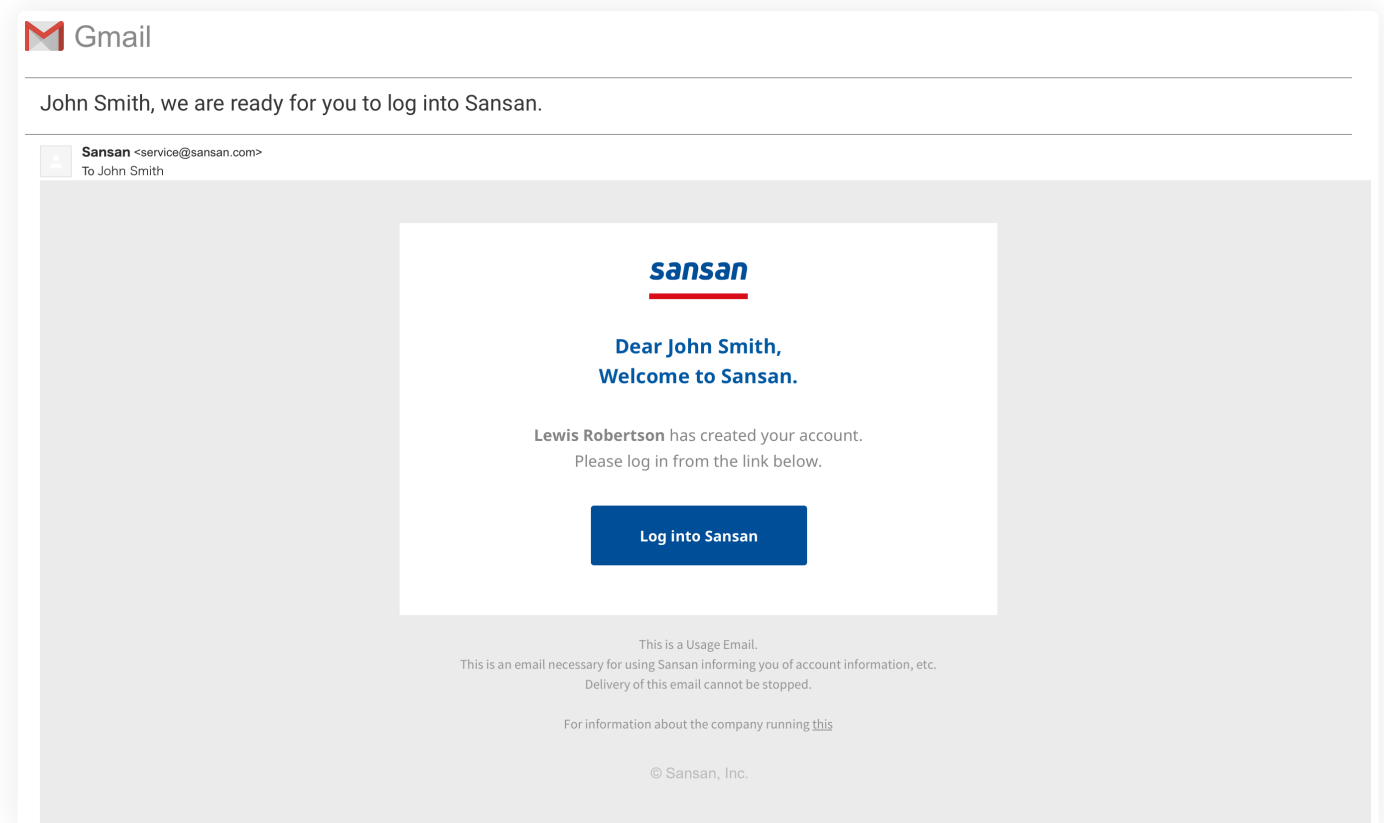
Find the email sent to your admin at 0:05 on the service start date. If you have trouble finding it, search for “Sansan”. Be sure to check your spam folder if you still can’t find it.



Access the login page

An email will be sent to the Sansan user company’s admin (email listed as the administrator at the time of application). Access the Sansan login page, and log in with the email and initial password.

The email will look similar to this:

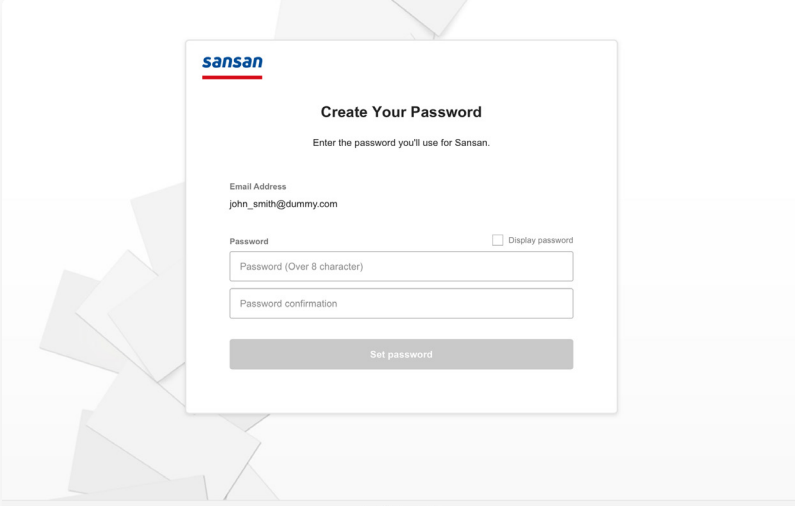


Step 2: Logging in as an administrator

Set your password

1

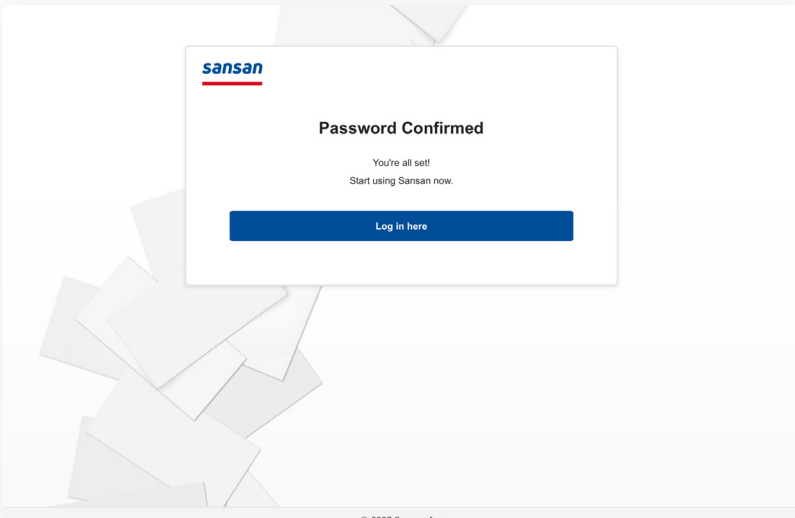
You'll be asked to set a new password.



The screenshot shows a web form titled "Create Your Password" with the Sansan logo at the top left. Below the title, it says "Enter the password you'll use for Sansan." The form contains an "Email Address" field with the value "john_smith@dummy.com", a "Password" field with a "Display password" checkbox, a "Password (Over 8 character)" field, and a "Password confirmation" field. A "Set password" button is at the bottom. The footer of the page reads "© 2007 Sansan, Inc."

2

Click "Log in here" after the password is confirmed.



The screenshot shows a confirmation message titled "Password Confirmed" with the Sansan logo at the top left. The message says "You're all set! Start using Sansan now." and includes a blue "Log in here" button. The footer of the page reads "© 2007 Sansan, Inc."

Requirements

- Use at least 8 characters
- Use a unique combination of letters, numbers, and symbols

Step 3

Initial settings



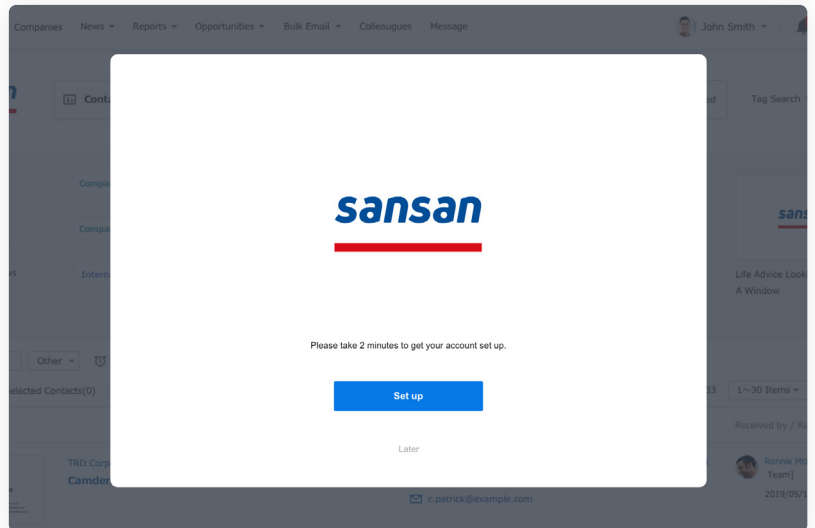
Step 3: Initial settings

Set up Sansan to meet your needs

When you're logged in, you can set up the system based on how your company will use it.

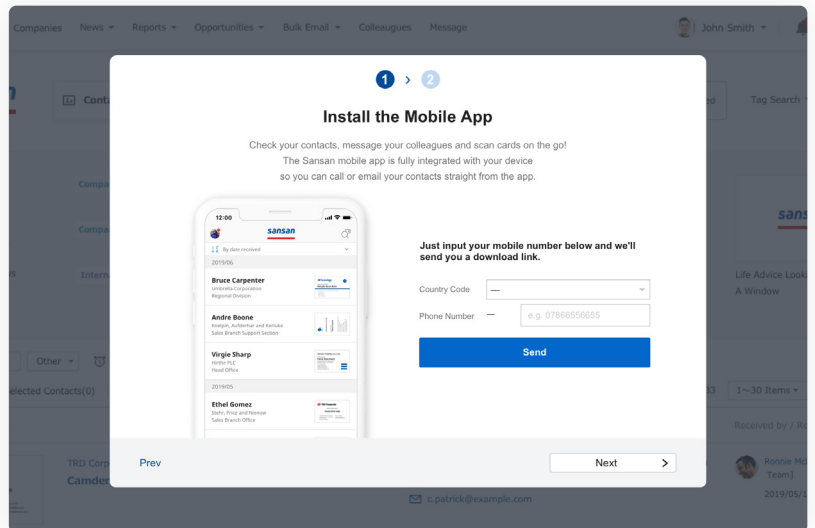
1

Click on the button to start the setup.



2

Enter your mobile number, and click "Send" to receive an SMS with a link to download 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

Step 3: Initial settings

3

Select your default email software and enter your email signature (optional).

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 you're done with the setup, click on "Getting Started" to start using Sansan.

You have completed the initial settings

Sansan, where business starts.

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

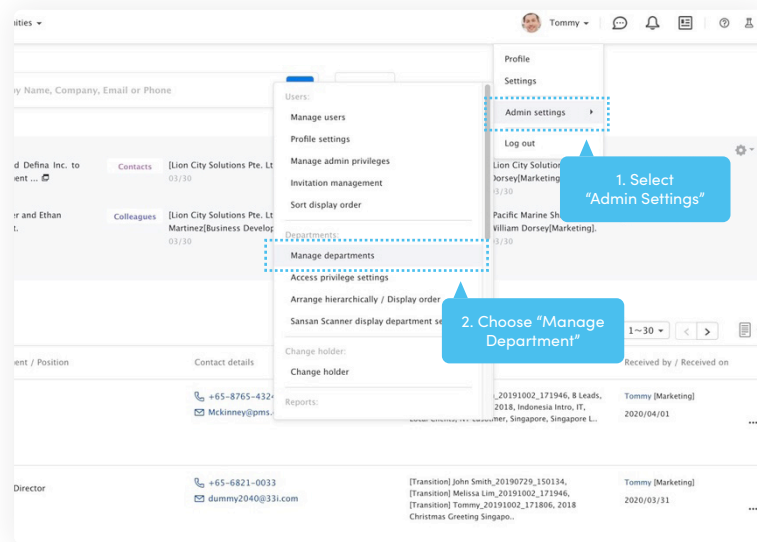
Prev Getting Started

Step 3: Initial settings

Add departments

1

After the initial setting, select "Admin Settings" then "Add/Edit/Delete Department" from the menu in the top right under the user name.



Points To Be Careful of When Using Administrator Settings

Please be aware of the following things when using the administrator settings.

2

Be sure to read the points to be careful about, and then click "I understand" to continue.

1. Changes made to these settings cannot be undone.
2. If you add a new user account, it will be reflected in the billing as stated in the Service Agreement.
3. If you delete a user account here, it will not affect your contract with Sansan. If you wish to reduce the number of users your company is charged for, please contact our sales representative.
4. If you add a given number of users and then delete the same number of users on the same day, it will be treated as User Replacement and will not require extra charges.

However, if the number of users is increased on the given day, and the same number of users is deleted on a later day, following our Service Agreement, this will be treated as increasing the number of users and additional charge will apply.

If you wish to transfer the business cards from one person whose account will be deleted to another person whose account has been added, and the procedures for doing this cannot be finished within one day, please contact our sales representative.

5. If you have multiple contracts under the same Company, changes to settings of other contracts cannot be made.
6. Please be aware that exporting business card data or sending business card data or other related data from Sansan to external services is to be done only at the users' discretion and that Sansan, Inc. can bear no responsibility for this.
7. Sansan APIs are only to be used within the range of the purpose of personal use, and are not to be used for purposes such as copying, sales, publishing, announcing, or distribution, except in cases permitted by our company.

Basic procedures are described in the help page below.
<https://jp-help.sansan.com/>

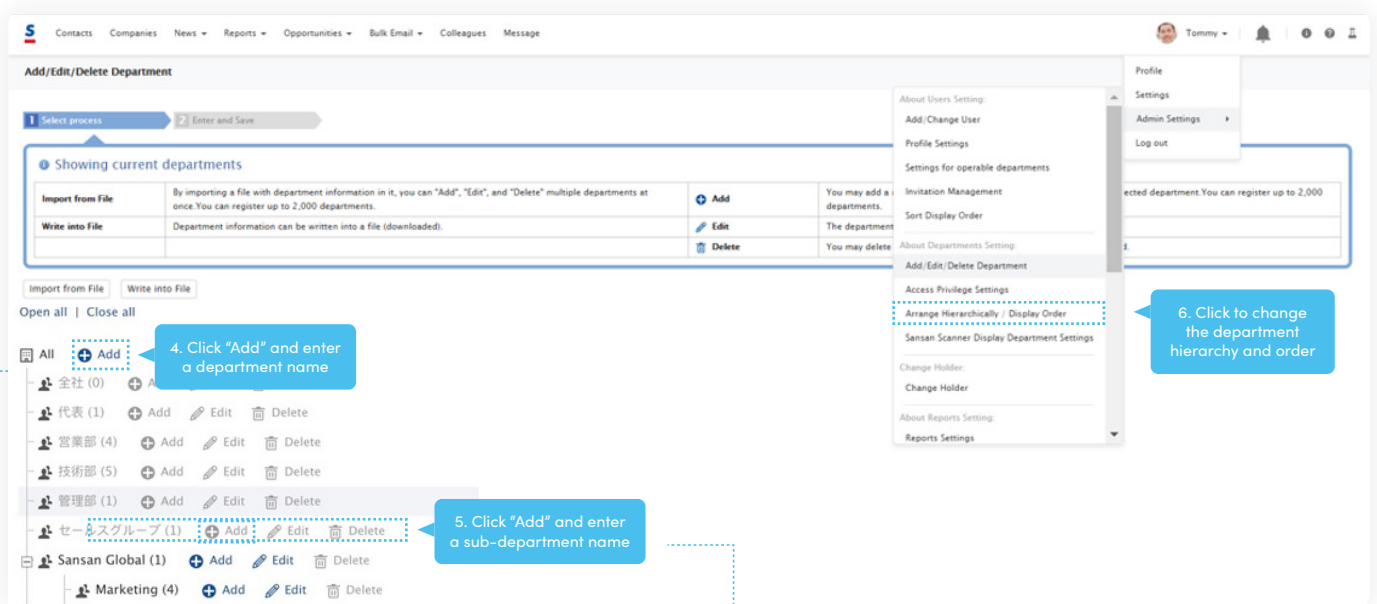
I understand

3. Click to continue

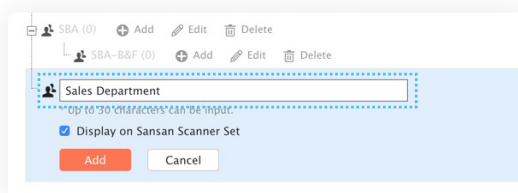
Step 3: Initial settings

3

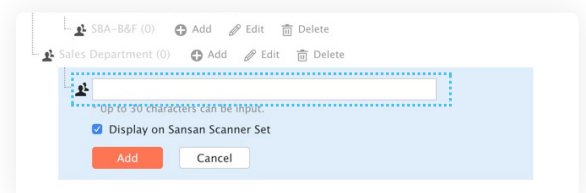
Click "Add" and enter a department name. If you want to create a lower-level department linked to an existing department, click "Add" to the right of the relevant department.



Adding a new department

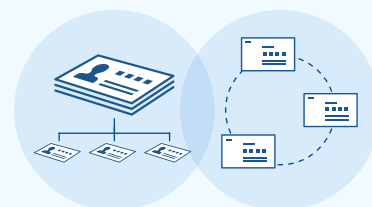


Creating a sub-department



Change department hierarchy and order

You can change the hierarchy and order of departments from "Arrange hierarchically / Display order".



Step 3: Initial settings

Add users

1

Click "Admin settings", "Manage users" and click "Add Users" to register IDs.

The screenshot shows the 'Manage Users' page. At the top, there are navigation tabs: '1 Select Process' and '2 Enter and Save'. Below this, there's a section for 'Showing the current user information list.' with buttons for 'Add Users', 'Change All', 'Import from File', 'Download File', and 'Reset Password'. A table lists users with columns for 'User ID', 'User Name', 'Alternative Name', 'Email Address', and 'Sub-Email'. On the right, there's a sidebar with 'Profile Settings' and 'Admin settings' (highlighted with a blue box and annotation '1. Select "Admin Settings"'). A dropdown menu is open under 'Admin settings', showing 'Manage users' (highlighted with a blue box and annotation '2. Choose "Manage users"'), 'Profile settings', 'Manage admin privileges', 'Invitation management', 'Sort display order', 'Departments: Manage departments', 'Access privilege settings', 'Arrange hierarchically / Display order', and 'Sansan Scanner display department settings'. At the bottom of the sidebar, there's a 'Change holder' section. The main table has 10 rows of user data.

2

Enter the required account information.

	Department	User ID	User Name	Alternative Name	Email Address	Sub-Email Address	Start Using Date	Language	Format for Incoming Email
<input type="checkbox"/>	Change Sansan Global	test	test		gcs+test@sansan.com		2020/01/23	English	HTML Email
<input type="checkbox"/>	Change Marketing	tommy	Tommy		bizdev+demo@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change Marketing	john	John Smith		bizdev+john@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change Marketing	william	William Dorsey		bizdev+william@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change Marketing	melissa	Melissa Lim		bizdev+melissa@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change Business Development	ethan	Ethan Martinez		bizdev+ethan@sansan.com		2018/02/09	English	HTML Email

User ID

This will often already be filled in. Please note the user ID cannot be changed after registration

Sub-Email Address

This is optional. It can be used, for example, if an admin assistant is managing an executive's account.

Start Using Date

Business cards can be scanned from a specified date. Account information emails will also be sent to users on this date. The default is the current date.

Step 3: Initial settings

3

Set the [user privileges](#) based on how your company uses Sansan. Details are on the next page.

<input type="checkbox"/>		Department	User ID	User Name	Alternative Name	Email Address	Sub-Email Address	Start Using Date	Language	Format for Incoming Email
<input type="checkbox"/>	Change	Sansan Global	test	test		gcs+test@sansan.com		2020/01/23	English	HTML Email
<input type="checkbox"/>	Change	Marketing	tommy	Tommy		bizdev+demo@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change	Marketing	john	John Smith		bizdev+john@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change	Marketing	william	William Dorsey		bizdev+william@sansan.com		2018/02/09	English	HTML Email

AD Integration ID	User Type	All Data Edit	Download Cards, Reports My Data / All Data	Email Function	Opportunities General User/Administrator	API Connection	View Usage Record	Download Company, Organization Tree
	Regular User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Salesforce and API integration

Check these only if you're using integration with external services.

4

Click "Save" on the left when you've added all the necessary user information.

<input type="checkbox"/>		Department	User ID	User Name	Alternative Name	Email Address	Sub-Email Address	Start Using Date	Language	Format for Incoming Email
<input type="checkbox"/>	Change	Sansan Global	test	test		gcs+test@sansan.com		2020/01/23	English	HTML Email
<input type="checkbox"/>	Change	Marketing	tommy	Tommy		bizdev+demo@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change	Marketing	john	John Smith		bizdev+john@sansan.com		2018/02/09	English	HTML Email
<input type="checkbox"/>	Change	Marketing	william	William Dorsey		bizdev+william@sansan.com		2018/02/09	English	HTML Email

Setting privileges for administrators

User Type	All Data Edit	Download Cards, Reports My Data / All Data	Email Function	Opportunities General User/Administrator	API Connection	View Usage Record	Download Company, Organization Tree
System Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Setting privileges for general users

User Type	All Data Edit	Download Cards, Reports My Data / All Data	Email Function	Opportunities General User/Administrator	API Connection	View Usage Record	Download Company, Organization Tree
Regular User	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Step 3: Initial settings

User permission details

Locked account	If this field is checked, administrator can go to Admin Settings to send an email that allows user to reset the password. Learn more on about this here.
Department	Select users' department from this field. If a user belongs to multiple departments, they should be listed using commas. Learn more on how to create/add departments.
User ID	Unique IDs are allocated to all users when they sign up and cannot be changed.
Username	Every account has a representative name.
Alternative Name	For users who go by multiple names , e.g. Chinese users with local name and anglicised name, administrator can register 2 names. Both names appear on the profile and are searchable.
Email	Users log in with this email, and use this when resetting passwords. News and notifications will be sent to this address.
Sub Email	This is not the login email, but users can choose to receive different types of news and notifications to the sub email.
Account Active from	Date the user started using the account, or the date user can start using the account.
Language	User's chosen default language.
Email Format	User's chosen email format; HTML or text.
ID for AD Link	ID required for AD connection, and not the user ID for AD.
User Type	This is the user type based on user privileges. Company administrator has the authority to add users, edit user privileges, and manage systems operations, and is the contact person of the company on Sansan. Departmental administrator is restricted to managing systems operations. Learn more about privileges.
Edit All Data	Users have been given the privileges to edit and delete all data on the database.
Download (My Data)	Users can download cards and reports in which they are the contact person. Learn more on downloading cards and downloading reports.
Download (All Data)	Users have been given the privileges to download all cards and reports.
Bulk Email	Users can send bulk emails to all contacts they are able to access.
Leads (All Users)	Users can view reports and create new reports. Learn more on managing leads.
Leads (Admin)	Administrator can create new company master and fields, as well as manage notifications on leads. Learn more on managing leads by administrator.
API Connection	Users can issue API keys to other users. Learn more about API Connection or Zapier Connection.
Download User Activity	Users can download information on user activity in CSV format, such as login frequency, number of cards ,and involvement in reports etc. Learn more about it here.
Download Organization Tree	Users can download the organization tree. Learn more about it here.

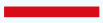
*Number of cases/contract IDs: The number of cases is the number of valid users in the contract. This does not include the number of users with the same company but with different contracts.

Click here for the settings for each item

<https://jp-help.sansan.com/hc/en-us/articles/206509047-Fields-and-privileges-for-adding-editing-users>

Step 4

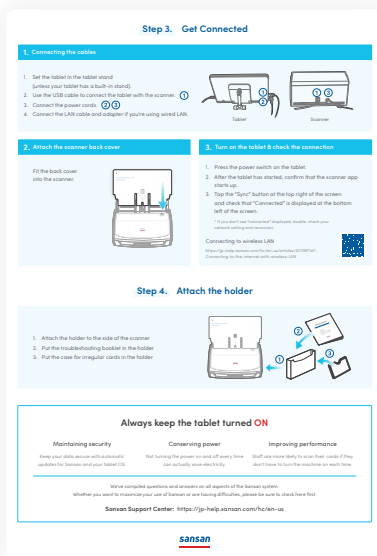
Installing the scanner



Step 4: Installing the scanner

Sansan Scanner Start-up Guide

Install the device following the Scanner Setup Guide included with the device package you receive from us. It takes around 15 minutes to get going.



Sansan Scanner Start-up Guide

Where to put the scanner

The best places for the scanner are **high-traffic areas** such as by the copier and near the office entrance. This way it is easily accessible and it will become routine for users to scan their cards as they go about their daily work.

Always keep it ON

Security software is continually updated in the devices, so it's necessary to always **keep them turned on**.

Make business card scanning a habit

Make business card scanning a habit in your office by putting the Sansan scanner in a high-traffic, high-visibility area.



Step 5

Scanning business cards

Step 5: Scanning business cards

Scan past business cards of all users

Scan as many cards as possible, from all users in your company. The high-speed scanner can process around 1,000 card sides per hour.

1

Set the business card(s) in the scanner.



Sansan Scanner

2

Select the department and user name.

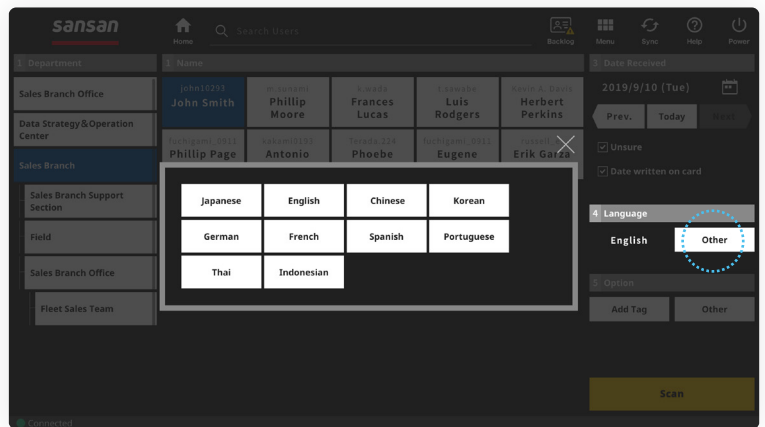
The screenshot shows the Sansan software interface with the following elements:

- Header:** Sansan logo, Home icon, Search Users field, Backlog, Menu, Sync, Help, Power icons.
- 1 Department:** A list of departments including Sales Branch Office, Data Strategy & Operation Center, Sales Branch (selected), Sales Branch Support Section, Field, Sales Branch Office, and Fleet Sales Team.
- 1 Name:** A grid of user cards. The first row includes John Smith (selected), Phillip Moore, Frances Lucas, Luis Rodgers, and Herbert Perkins. The second row includes Phillip Page, Antonio Larson, Phoebe McBride, Eugene Shaw, and Erik Garza. The third row includes Ivan Ortega and Minerva Jennings.
- 3 Date Received:** A section for 'Unsure' with 'Prev.', 'Today', and 'Next' buttons. It includes checkboxes for 'Unsure' and 'Date written on card'.
- 4 Language:** A section with 'English' and 'Other' buttons.
- 5 Option:** A section with 'Add Tag' and 'Other' buttons.
- Bottom:** A large yellow 'Scan' button circled in yellow.
- Footer:** A 'Connected' status indicator.

Step 5: Scanning business cards

3

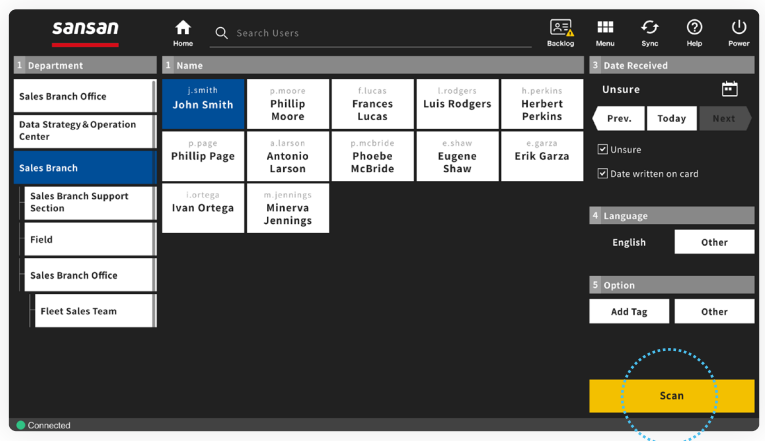
Select the card language.



4

Tap "Scan" to start the digitization process.

Up to 20 cards sides per user will be processed within the next business day. If more than 20 are scanned, 20 will be chosen at random, with the rest completed on successive days.



Available languages

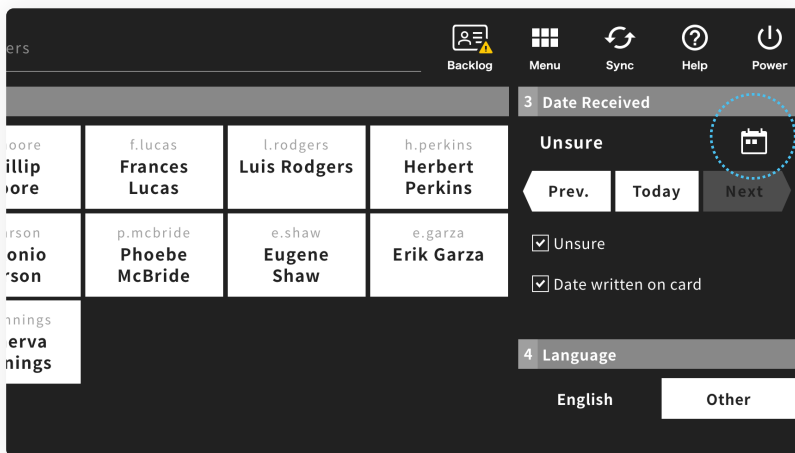
Sansan can recognize English, Japanese, Chinese (simplified and traditional), Korean, German, French, Spanish, Portuguese, Thai, Indonesian, and Vietnamese.



Step 5: Scanning business cards

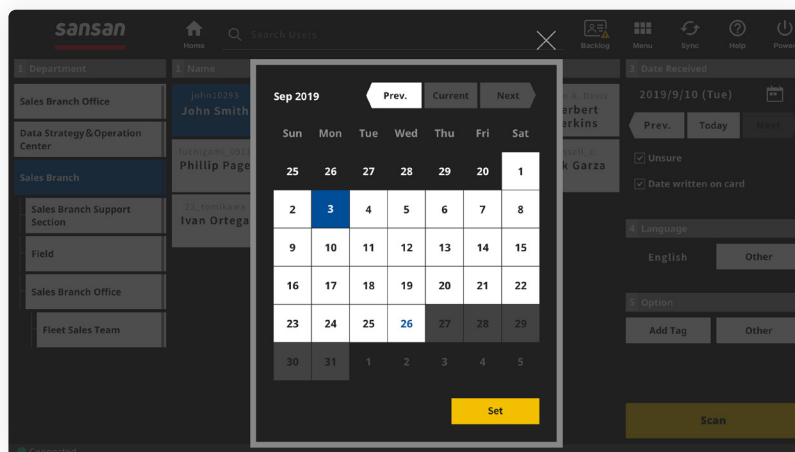
Setting the exchange date

You can select a specific date of card exchange at the time of scanning. The default is the current date. The actual date of exchange can be a key data item, so we recommend taking special care to make this as accurate as possible.



1

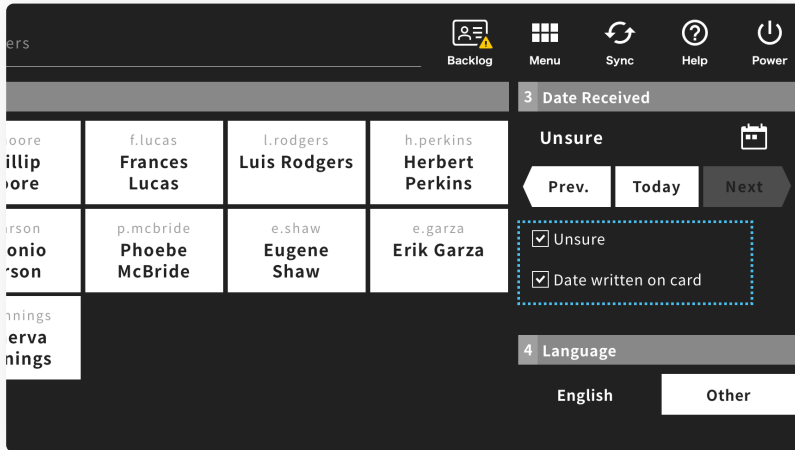
Tap the calendar icon



2

You can specify a business card exchange date by setting a past [Date] and selecting [Set].

Step 5: Scanning business cards



3

If you don't remember the exact date of exchange, tap "Unsure". Select "Date written on card" if you want to process a handwritten date* on the card.

*This falls outside of our quality guarantee and is offered on a best-effort basis.

When you have contact information, but no card

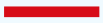
Contact information/data can be imported even if you don't have an actual business card. This requires admin privileges and can be done with a simple CSV file.

Check here for how to do this
<https://jp-help.sansan.com/hc/en-us/articles/206509257-How-to-import-contact-data>

- There is no charge to do this.
- Up to 10,000 items can be imported.
- Time may vary depending on the job size and other queued jobs.
- Please note that business card images cannot be imported.
- The import must be adapted to our format.

Step 6

First login (all users)



Step 6: First login (all users)

Inform users of their initial login information

As admin, you'll need to let authorized users know when they can start using Sansan. Log in as in Steps 2 to 3.

1

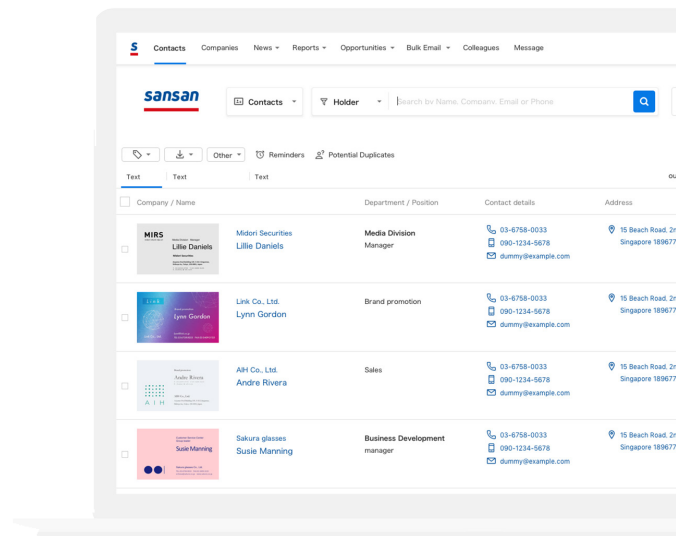
Bookmark the login page

2

Set the initial password

3

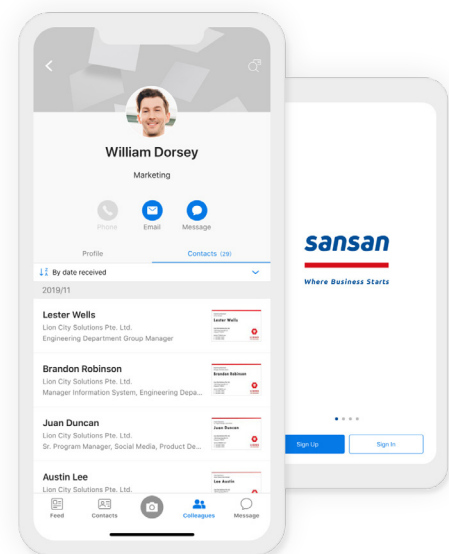
Check that a business card is correctly in the account



Install the Mobile App

The Sansan Mobile App is powerful companion for any iPhone or Android smartphone. It lets you scan and check new contacts on the go, incorporated with your phone's calling function, and syncs with the Sansan database. For mobile teams and sales reps this is especially useful.

Search for "Sansan" in the AppStore or Google Play and download it for free.



Step 6: First login (all users)

Confirm logins and check usage

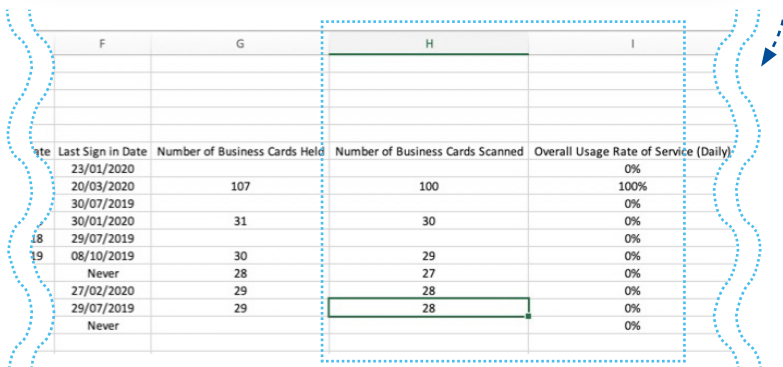
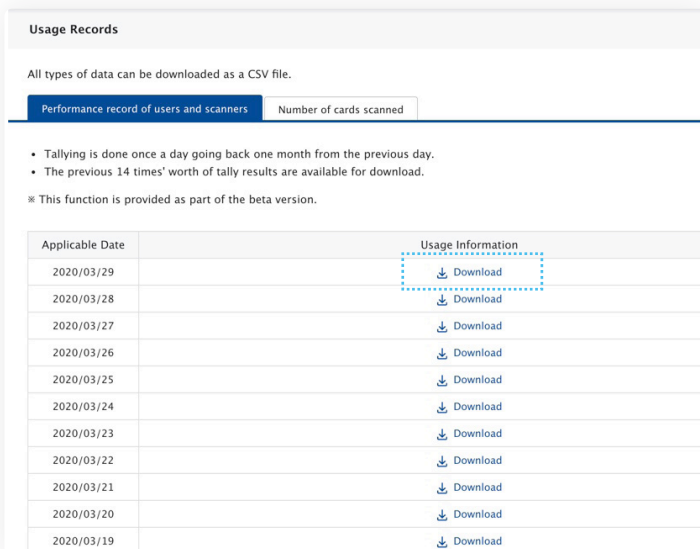
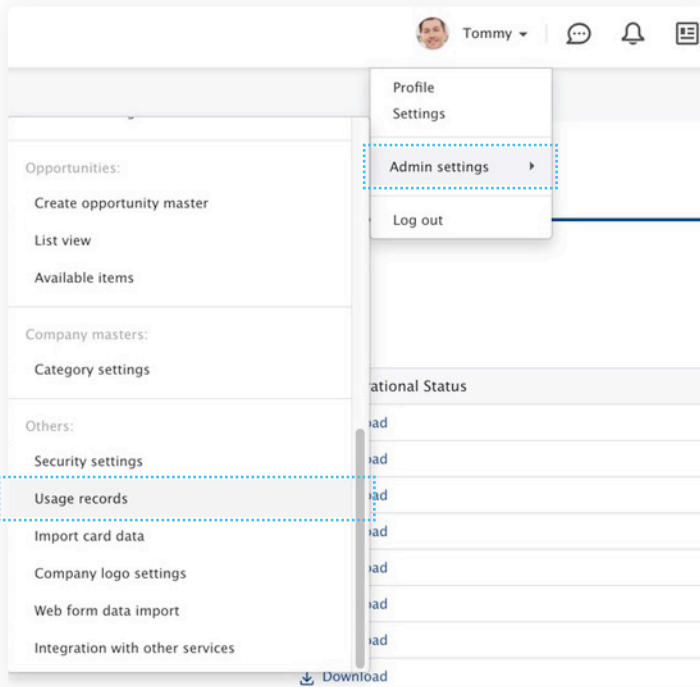
Make sure that all users have logged in at least once.

1

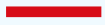
Go to "Admin Settings", "Usage Record". If you can't use the usage record, add it under the admin privileges, then log out and log back in.

2

Click "Download" and check the usage record CSV for each user. This contains information such as the number of business cards each user has registered.



Notes and support



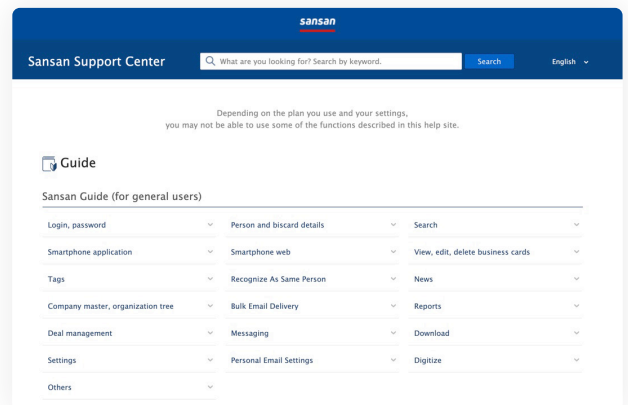
Notes on importing

- It can take some time for the number of cards to show in the confirmation screen.
- Cards are not necessarily processed in the order they are scanned.
- When possible, add tags at the time of scanning, as this will keep your contacts more organized.
- Double-sided business cards count as two scans toward your total scan allotment.
- The default date of card exchange is the date on which the scan takes place. You can choose to specify the date at the time of scanning.
- If the front and back of a card are in different languages, set the scanner for the language of the front side.
- Make sure the side you want to scan is facing upward.

Sansan Support Center

If you have any questions about using Sansan, first check the online Sansan Support Center. Here you'll find a wealth of information on everything from basic settings to integration.

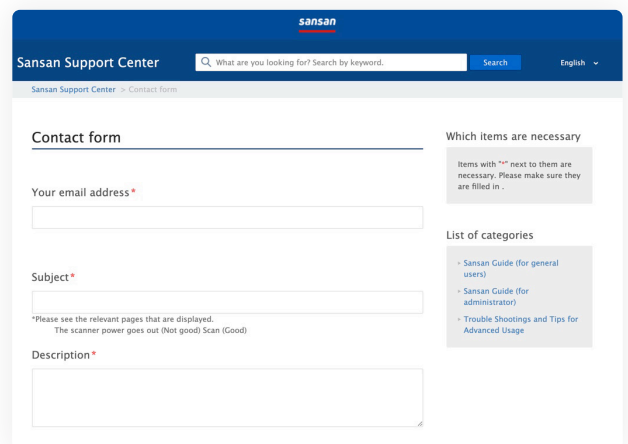
<https://jp-help.sansan.com/hc/en-us>



Support contact form

If you still have questions after checking the Sansan Support Center, you can contact us at:

<https://jp-help.sansan.com/hc/en-us/requests/new>



sansan
