

Microsoft Teams + Sansan Virtual Cards

Integrate Sansan with Microsoft Teams and send Virtual Cards to meeting members



3 MAJOR BENEFITS

Exchange business cards beforehand to know who's who and be prepared



Exchange business cards
right from Teams



Send your colleagues'
Virtual Cards, too



Check who you're meeting
for the first time & get
notified if attendees change

1

View external meetings

When you install the Sansan plug-in, an [External Meetings](#) tab will be added in the menu bar on the left.

(The user needs to log in to Sansan.)

Click on [External Meetings](#) and all external meetings set in Teams will be listed.

Microsoft Teams

Search or type a command

Activity Chat Teams Calendar Calls

S External Meetings Meetings About

Here you can check your external meetings and send your Virtual Card. [Log Out](#)

32 meetings

Time & Date	Overview	Created by	Virtual Card
Oct 3, 2020 12:00 - 13:00	Kick-off meeting External : Leo Carr (Lion City Solutions Pte. Ltd.) , 5 others Internal : Glenn Hopkins, 4 others	Glenn Hopkins	Not sent
Oct 3, 2020 15:00 - 16:00	Catch-up External : Guy Gomez (United Electronics Pte. Ltd.), 6 others Internal : Glenn Hopkins, 3 others 📍 Headquarters	Glenn Hopkins	Sent ✓ Sep 28, 15:38
Oct 3, 2020 15:00 - 16:00	About 2021 Fiscal year External : Francisco Fernandez (Sansan Motor PVT. LTD.), 7 others Internal : Marilyn Baker, 6 others	Marilyn Baker	Sent ✓ Sep 28, 15:38
Oct 3, 2020 15:00 - Oct 4, 2020 - 16:00	Meeting with Pacific Marine Shipment Pte. Ltd. External : Kim Long (Pacific Marine Shipment Pte. Ltd.), 4 others Internal : Glenn Hopkins 📍 Headquarters	Glenn Hopkins	Not sent

2 Choose whom you want to exchange cards with

Click on an external meeting to display the meeting members. Choose whom you want to send your team's Virtual Cards to.

From here, you can also check who you're meeting for the first time.

The screenshot shows the Microsoft Teams interface with the 'External Meetings' tab selected. The meeting is titled 'Kick-off meeting' and is scheduled for Oct 3, 2020, from 12:00 to 13:00. The interface is divided into two main sections: 'Recipients' and 'Your colleague's Virtual Card(s)'. The 'Recipients' section lists three individuals: Russell Chua (Managing Director), Danielle Nguyen (Deputy Managing Director), and Joy Gomez. The 'Your colleague's Virtual Card(s)' section lists three colleagues: Glenn Hopkins (Sales Director), Annette Campbell (Marketing Assistant), and a group of colleagues who need to change their Virtual Card settings (Rosemary Herrera, Fatima Patel, and Francisco Fernandez). A blue button at the bottom right says '+ Confirm and go to email preview'.

Microsoft Teams

Search or type a command

External Meetings Meetings About

Kick-off meeting Oct 3, 2020 12:00 - 13:00 Close

Select who to send your Virtual Card to

Recipients Edit members

Lion City Solutions Pte. Ltd.

☒ Russell Chua
Managing Director
russellchua@lioncity.com
They're meeting Glenn Hopkins for the first time

☒ Legal / Administrative Director
tedgarza@lioncity.com

☒ Danielle Nguyen
Deputy Managing Director
daniellenguyen@lioncity.com

International Management Systems CO., LTD.

☒ Joy Gomez
joygomez@ims.com

Your colleague's Virtual Card(s) Edit members

Glenn Hopkins
Sales Director
Copy Virtual Card URL

Annette Campbell
Marketing Assistant
Copy Virtual Card URL

Colleagues that need to change their Virtual Card settings ?

Rosemary Herrera
Need to set up their Virtual Card

Fatima Patel
Need to issue their Virtual Card URL

Francisco Fernandez
Need to change their security settings

+ Confirm and go to email preview

3

Send Virtual Cards

Send your and your colleagues' Virtual Cards via email. You'll be able to preview the email before you send it.

From: Sansan (service@sansan.com)
 To: me, Russell Chua (russellchua@lioncity.com), Ted Garza (tedgarza@lioncity.com), Danielle Nguyen (daniellenguyen@lioncity.com ...

[Show all](#)

Received Virtual Cards: Kick-off meeting - Oct 3, 2020 12:00

You've received Virtual Cards from members attending Kick-off meeting – Oct 3, 2020 12:00

Receive their Virtual Card, and send back yours.

 33 Networks
 Glen Hopkins
 Sales Director
<https://ap.sansan.com/v/virtual-cards/a92c8ce6728049c7b51d56e339sample/>

33 Networks
 Annette Campbell
 Marketing Assistant
<https://ap.sansan.com/v/virtual-cards/a92c8ce6728049c7b51d56e449sample/>

Sending/receiving Virtual Cards (Web App)
<https://jp-help.sansan.com/hc/en-us/articles/900000936163>

Sending/receiving Virtual Cards (Mobile App)
<https://jp-help.sansan.com/hc/en-us/articles/900000962543>

☒ Send a copy to your email

Send

Cancel

Easy Setup

For Admins

Download the Sansan integration app from

1

https://s3-ap-northeast-1.amazonaws.com/help-contents.sansan.com/img/Sansan_integration_app_Microsoft_Teams.zip



Upload the app to Microsoft Teams following the steps here

2

<https://docs.microsoft.com/en-gb/MicrosoftTeams/manage-apps#publish-a-custom-app-to-your-organizations-app-store>



*Allow Teams integration from "3rd Party Integration" in Sansan.

For Users

3

Download the app from the organization's app store.

FAQ

1

Do I need to sign an additional contract to use this feature?

If you have a Sansan or Teams account, no additional contract is needed.

5

Will an auto-reminder be sent to the client if they didn't send back their Virtual Card?

No, no reminder will be sent.

2

Will I know if I have previously exchanged a business card with someone?

Yes. If you've met before, no label indicating a first meeting will be shown next that person.

6

If my manager enables access privilege control and we're attending the same meeting, will I know if they've already met any of the external members?

This is case-by-case. The system will identify them as meeting external members for the first time. If any of the following cannot be referenced.

- Image
- Company info
- Name / Importance
- Contact since
- Contact Info
- Mobile
- Email

3

Do I need to send my Virtual Card through MS Teams, or can I use MS 365?

You have to use MS Teams to enjoy this function.

4

If my colleague previously exchanged a business card with an external member, will I know?

Yes. If they've met before, no label indicating a first meeting will be shown.

7

Can I see if my colleagues have already sent internal members' Virtual Cards to the meeting attendees?

Yes. If they have, you'll see the date and time they were sent in the top left corner of your screen.

sansan
