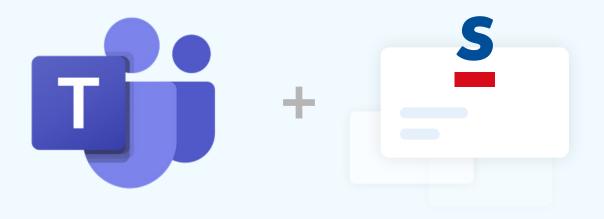


Microsoft Teams + Sansan Virtual Cards

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



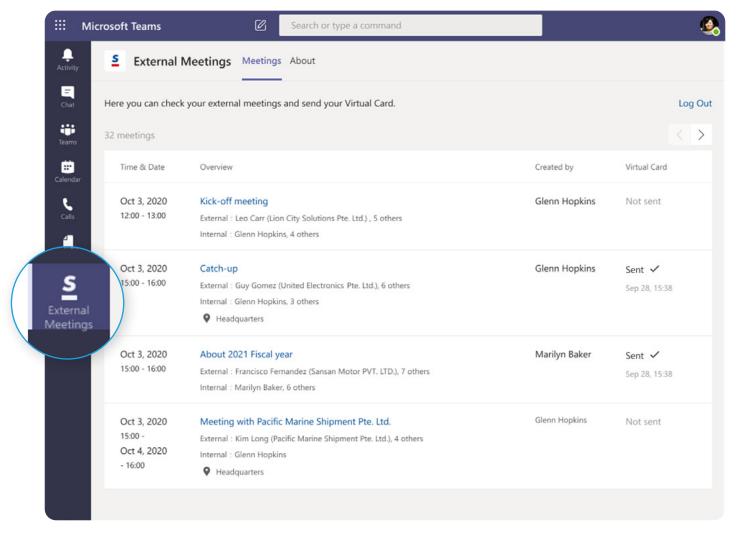
Check who you're meeting for the first time & get notified if attendees change

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.

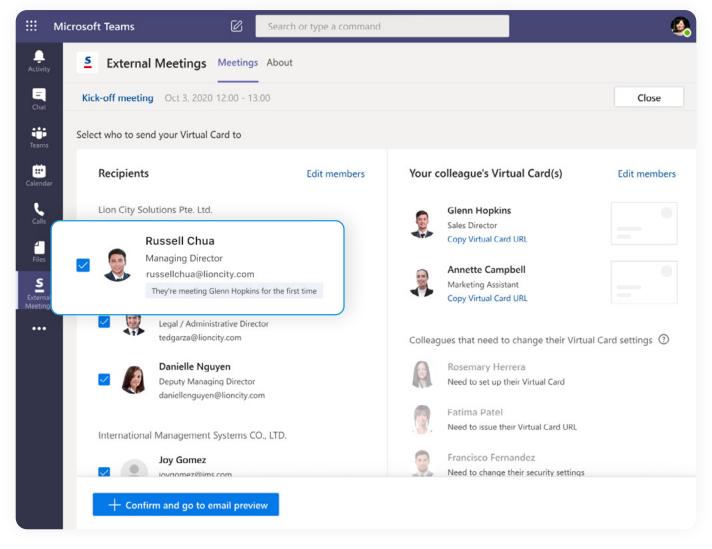




Choose whom you want to exchange cards with

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.





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) me, Russell Chua (russellchua@lioncity.com), Ted Garza (tedgarza@lioncity.com), Danielle Nguyen (daniellenguyen@ 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

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

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



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

For Users

Download the app from the organization's app store.

FAQ

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.

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

No, no reminder will be sent.

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.

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

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.

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.

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.

