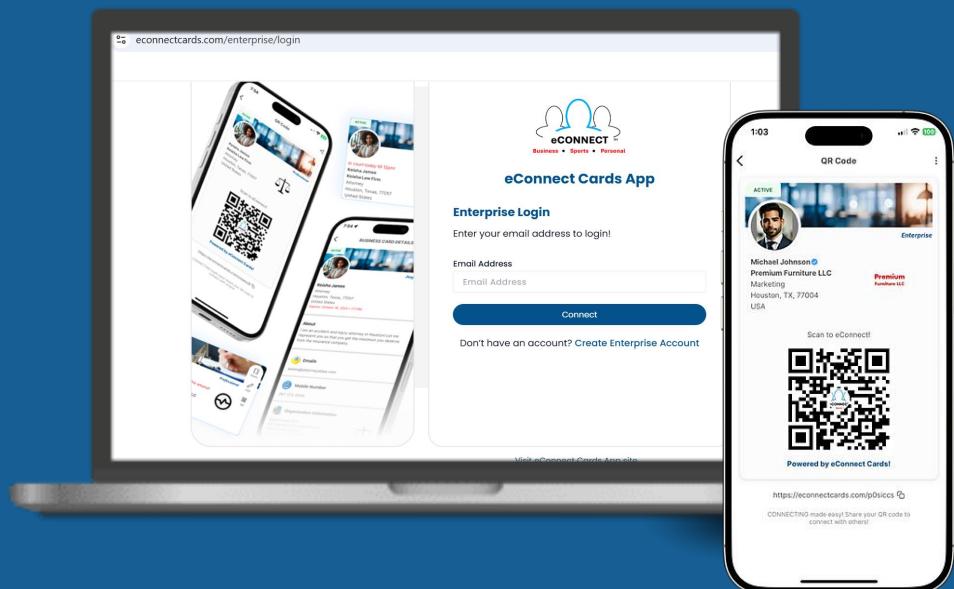




## eConnect Cards Enterprise Portal

*...Digital Business Cards for Teams...*



# User Guide

**A step-by-step instructional document that helps users understand and effectively use the eConnect Cards Enterprise Portal.**



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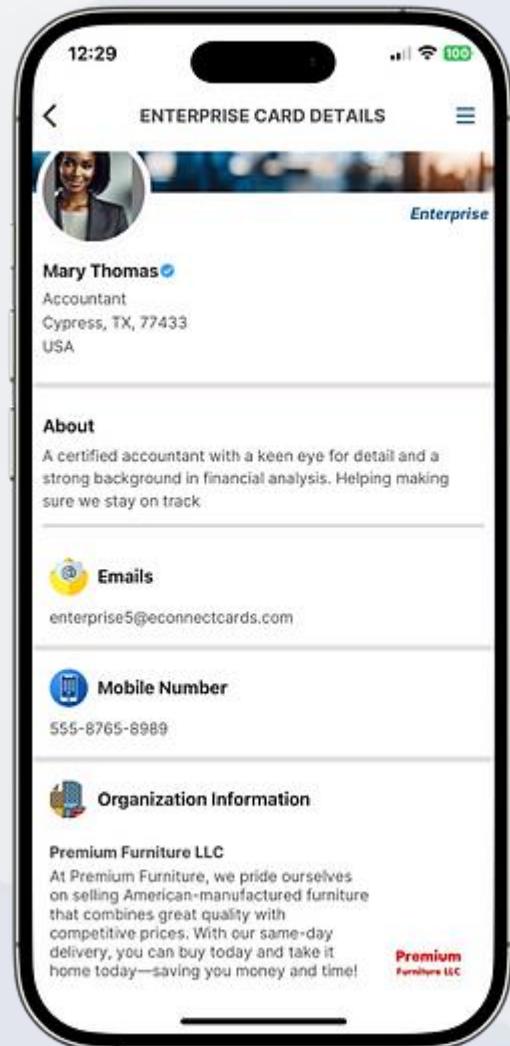


## eConnect Enterprise App Overview

The eConnect Enterprise Cards Portal is a powerful digital business card platform built for teams and organizations ready to elevate customer engagement, amplify brand visibility, enhance lead generation, and streamline operations.

Designed for organizations of all sizes, the Enterprise solution enables teams to effortlessly create, manage, and share fully customizable digital cards at scale. With an intuitive user interface, robust administrative controls, and an on-demand setup, it simplifies networking and brand promotion – while empowering your team to share a unified brand story and generate leads when needed.

Whether you're equipping internal teams, engaging with clients, or managing large-scale events, the Enterprise version provides the tools to elevate your digital presence and strengthen both your connection and growth strategies.



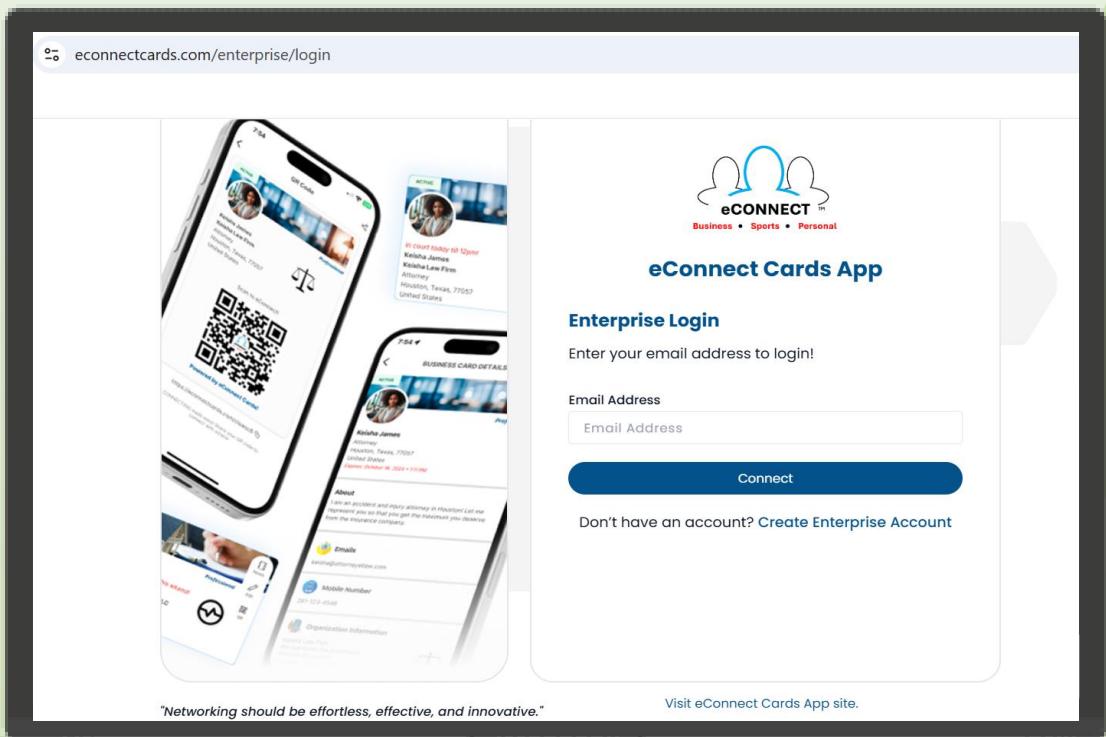
# Getting Started



Open the URL on your web browser:



[www.econnectcards.com/enterprise/login](http://www.econnectcards.com/enterprise/login)

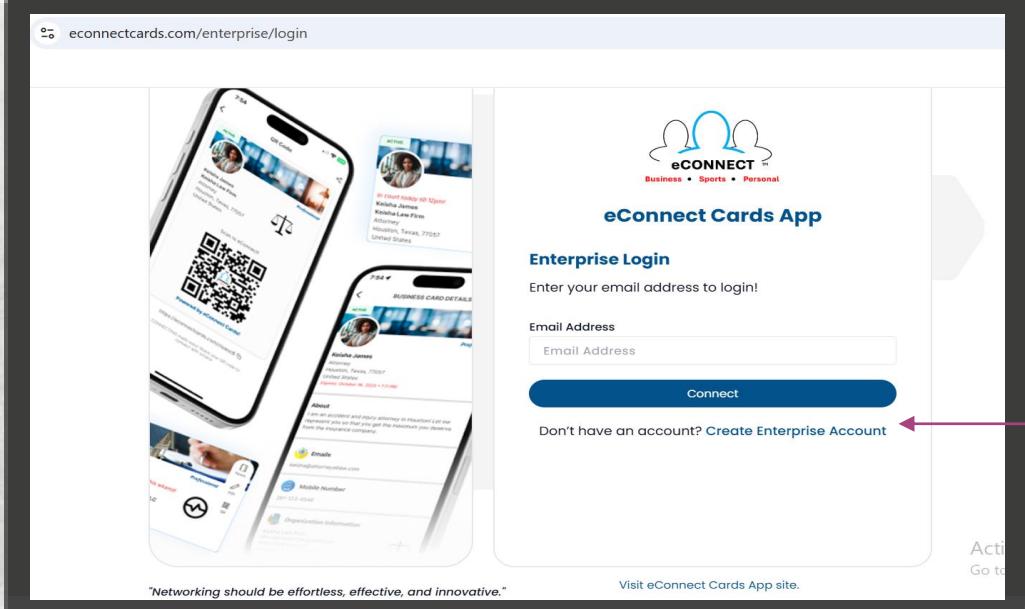


*For the best experience, we recommend performing these tasks on a computer.*

1

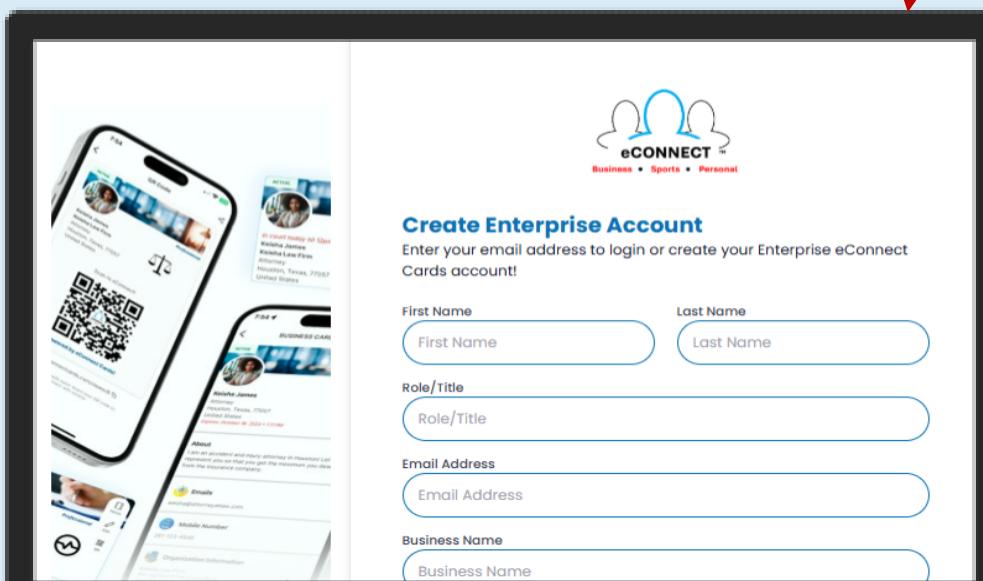
## Create an Account

From the eConnect Cards  
Enterprise Portal Login Screen,  
click on 'Create Enterprise  
Account'



Fill the form details correctly  
and then click on the  
**'Create Enterprise Account'**  
button.

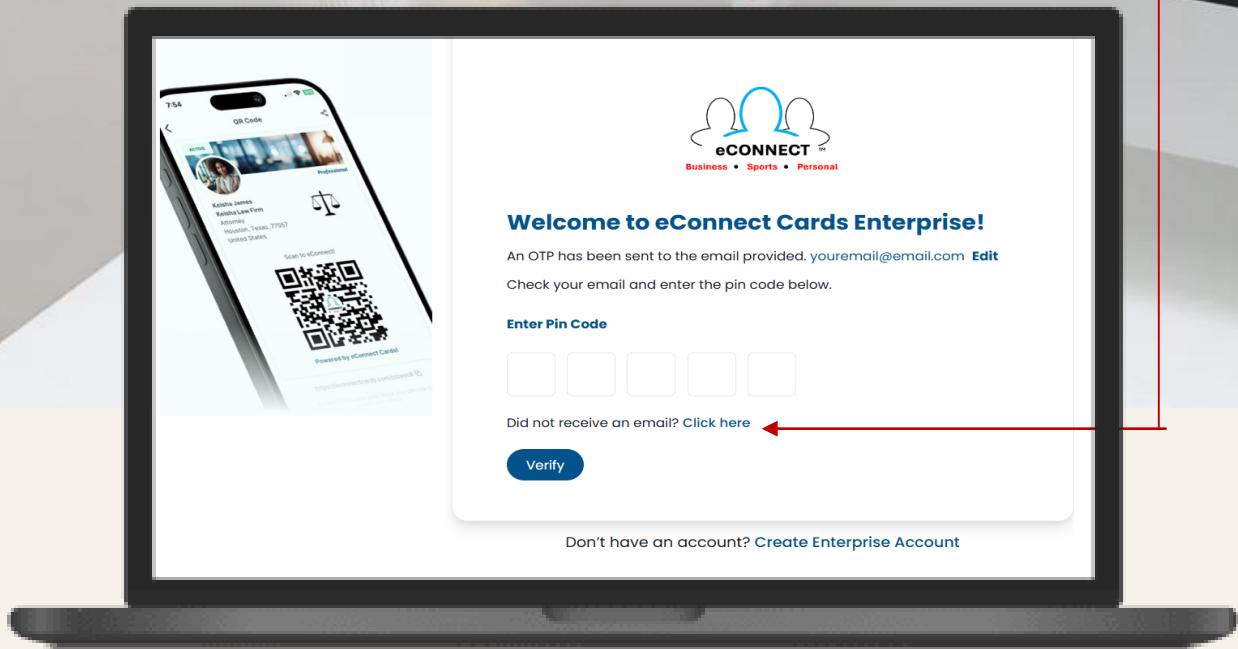
**Note: All fields are required!**



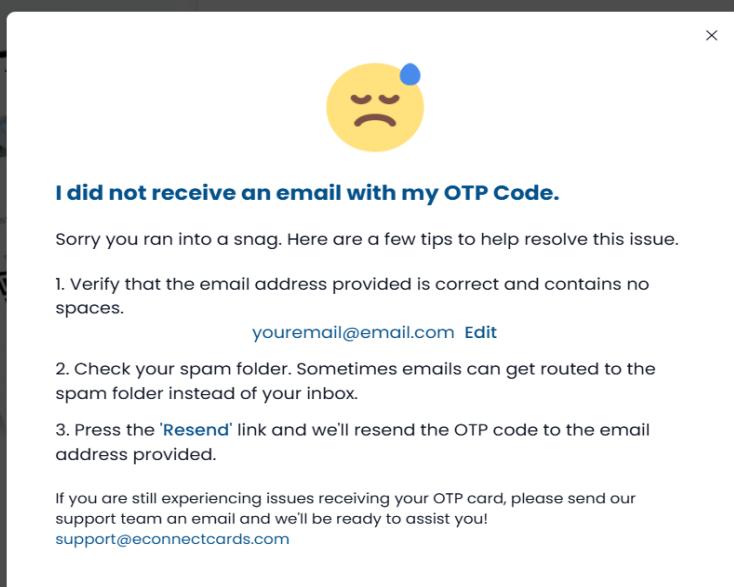
After clicking the **'Create Enterprise Account'** button, a verification code will be sent to the email address provided during account setup.

If you do not receive a verification code in your email, click on the link next to **'I did not receive an email'**.

If you do not receive a verification code  
in your email, click on the link next to  
**'I did not receive an email'.**



Follow the on-screen instruction to resolve the issue.



## 2 Email Verification

Enter the OTP to  
verify your email  
address.

### Welcome to eConnect Cards Enterprise!

An OTP has been sent to the email provided. [youremail@gmail.com](mailto:youremail@gmail.com) [Edit](#)

Check your email and enter the pin code below.

#### Enter Pin Code

Did not receive an email? [Click here](#)

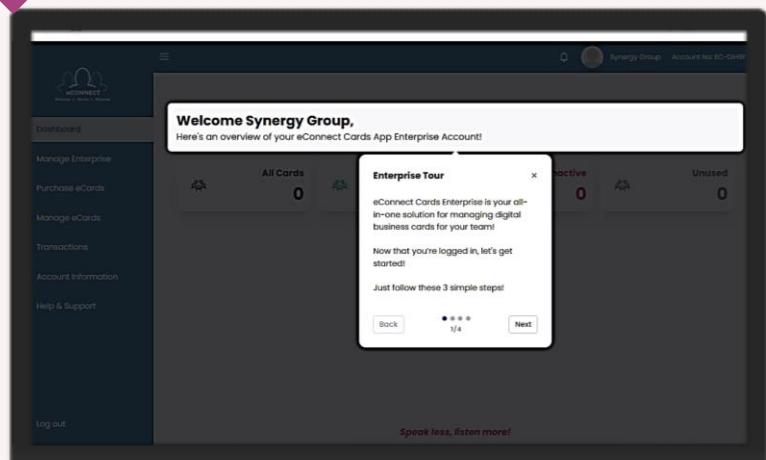
[Verify](#)

Don't have an account? [Create Enterprise Account](#)

After successfully verifying your email address, you'll be logged into eConnect Cards Enterprise Portal. Follow the prompts on the screen that guides you through an overview of the portal to help get you started.

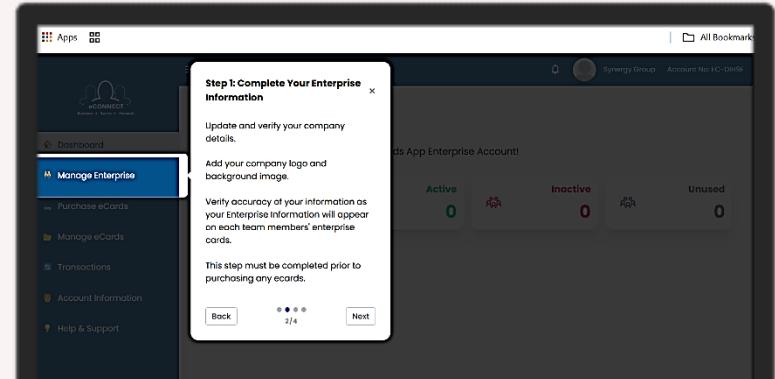
1

## Welcome Screen



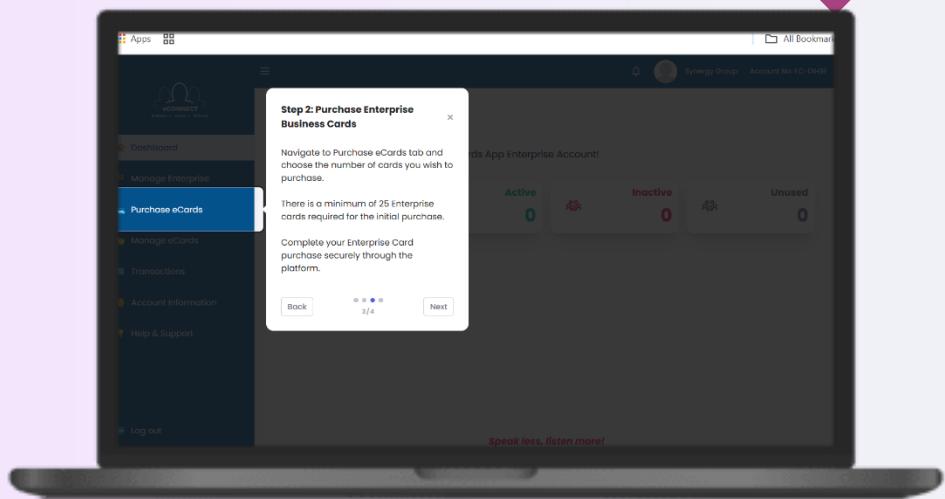
## Manage Enterprise

2



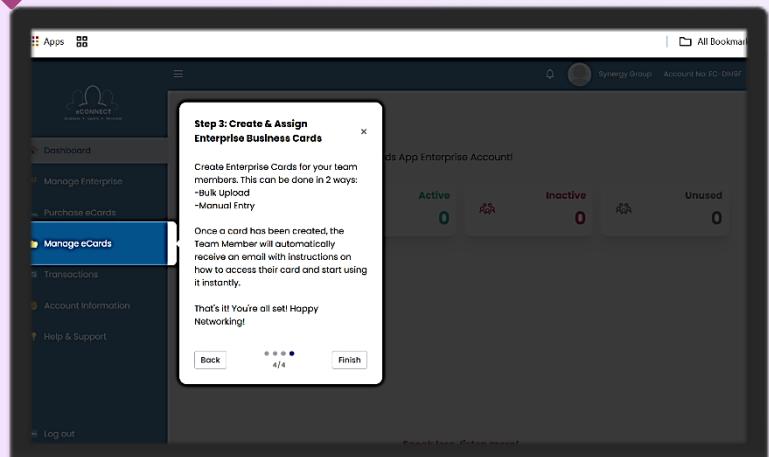
3

## Purchase Enterprise Business Cards



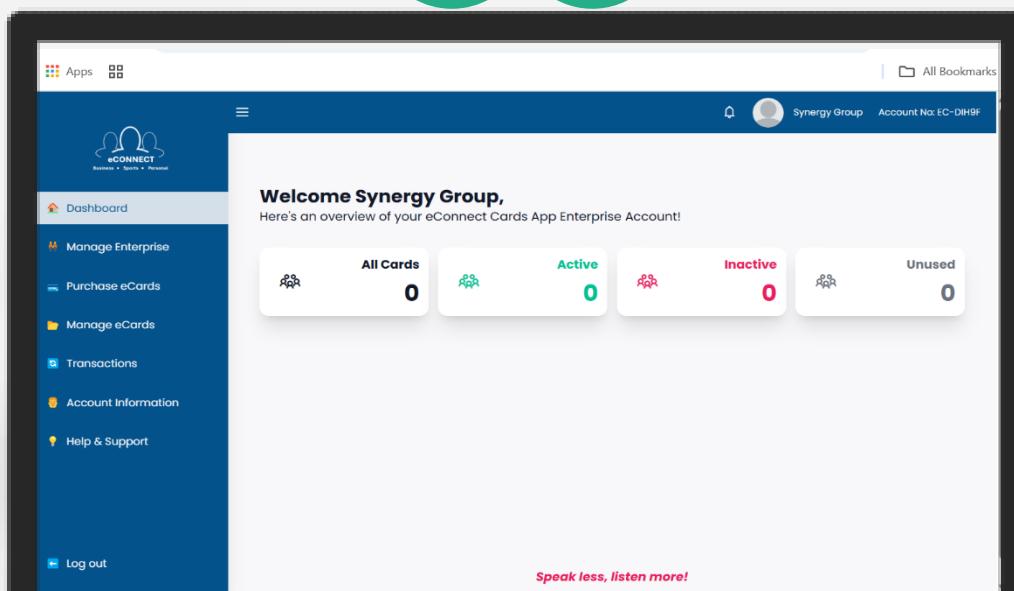
4

## Manage eCards





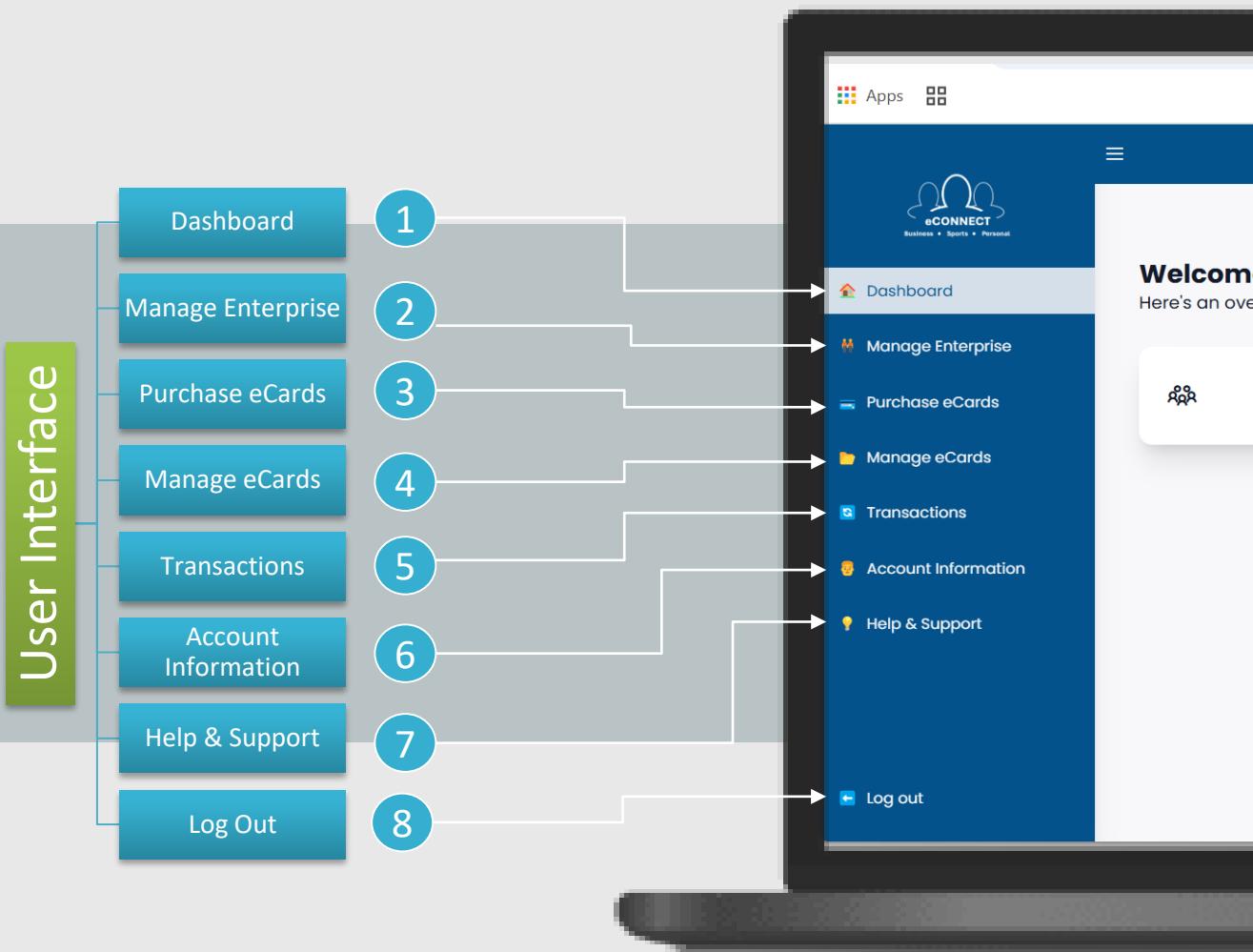
**Congratulations!**  
You are now on the dashboard  
of the eConnect Cards  
Enterprise Portal. Let's dive  
into the menu options  
available on the dashboard.



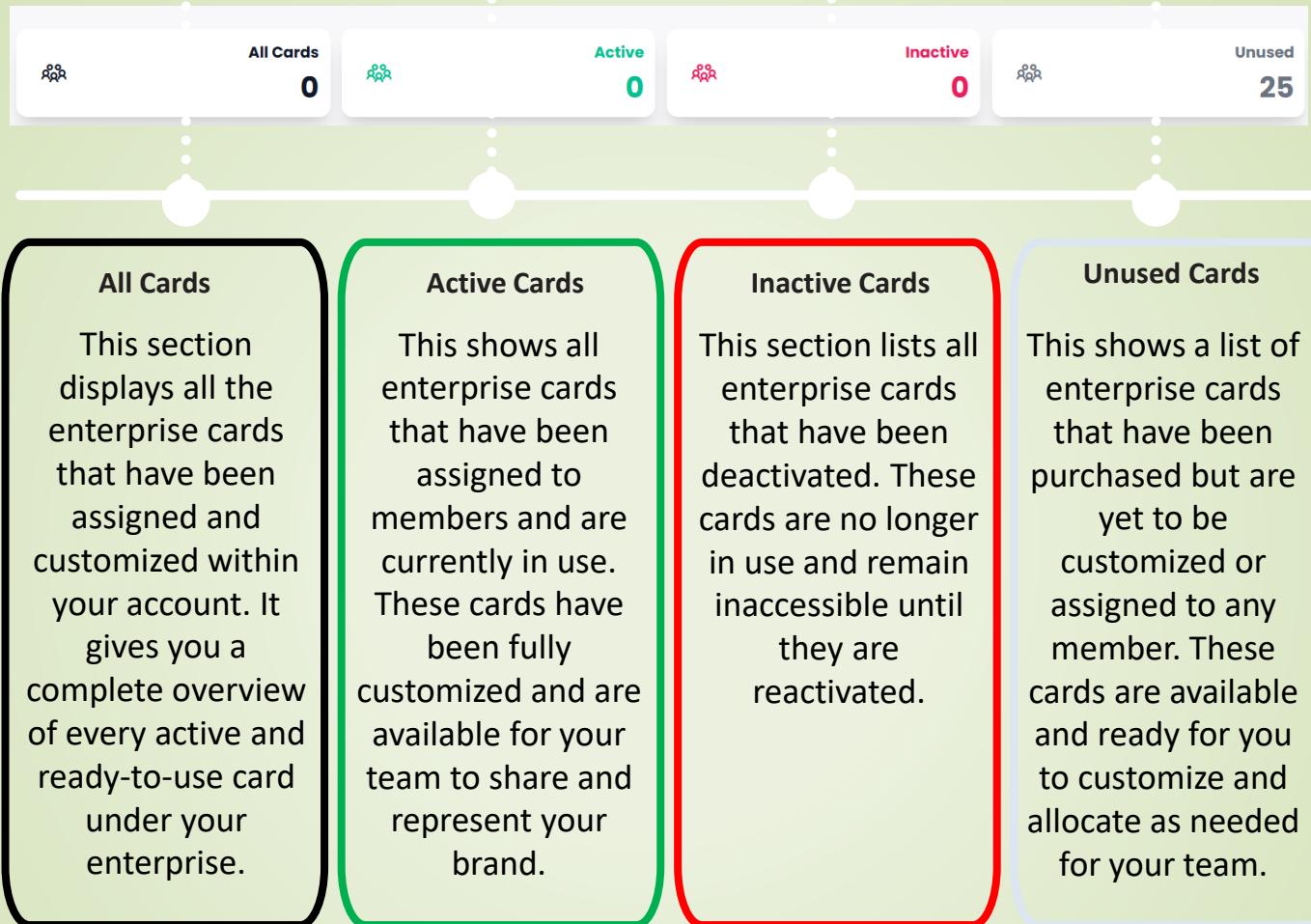
The screenshot shows a computer monitor displaying the eConnect Cards Enterprise Portal. The dashboard is titled "Welcome Synergy Group" and provides an overview of the account. On the left, a sidebar menu lists options: Dashboard, Manage Enterprise, Purchase eCards, Manage eCards, Transactions, Account Information, Help & Support, and Log out. The main content area shows a summary of card status: All Cards (0), Active (0), Inactive (0), and Unused (0). A red banner at the bottom right of the dashboard area says "Speak less, listen more!"



# Understanding the Dashboard UI



# User Dashboard



# Manage Enterprise Information

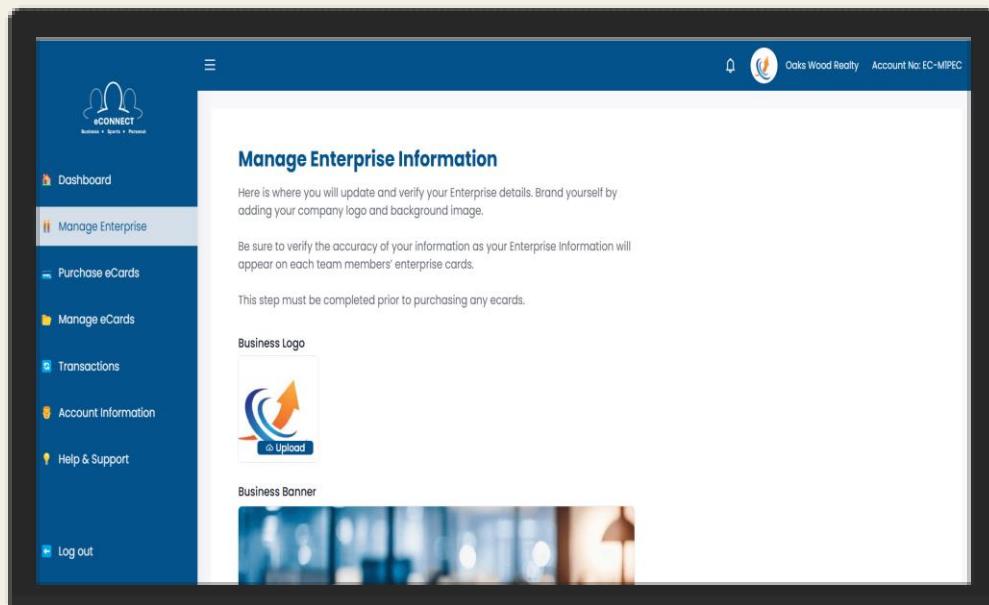


The first step after creating your eConnect Cards Enterprise Account is to update your company's information that will be displayed on the digital cards of everyone who is assigned a card from this Enterprise Portal account.

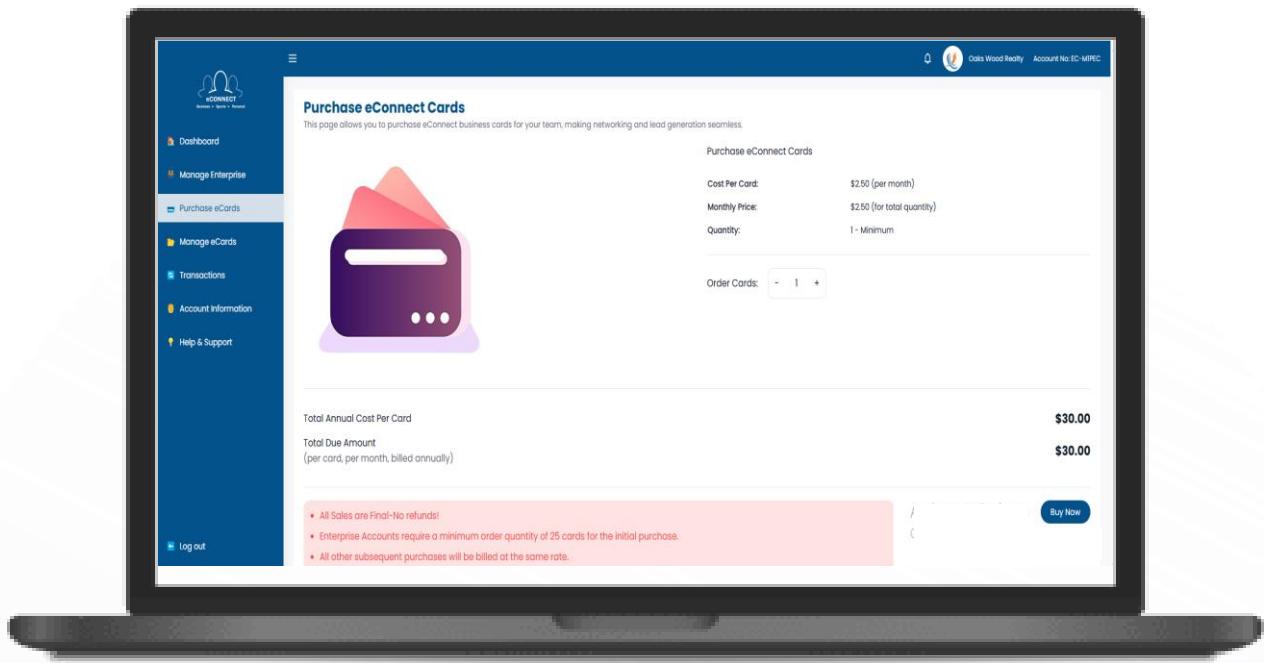
Here is where you can customize your cards and tell your company's story in an engaging manner. Share how your company is different from others who may be offering the same product or service. You get to brand your cards by adding a company logo, updating theme colors, share your company's contact information along with a brief description, and more.

Once you've completed making updates, click the 'Update' button to save your changes.

**Tip: The recommended banner size is 1584x396.**

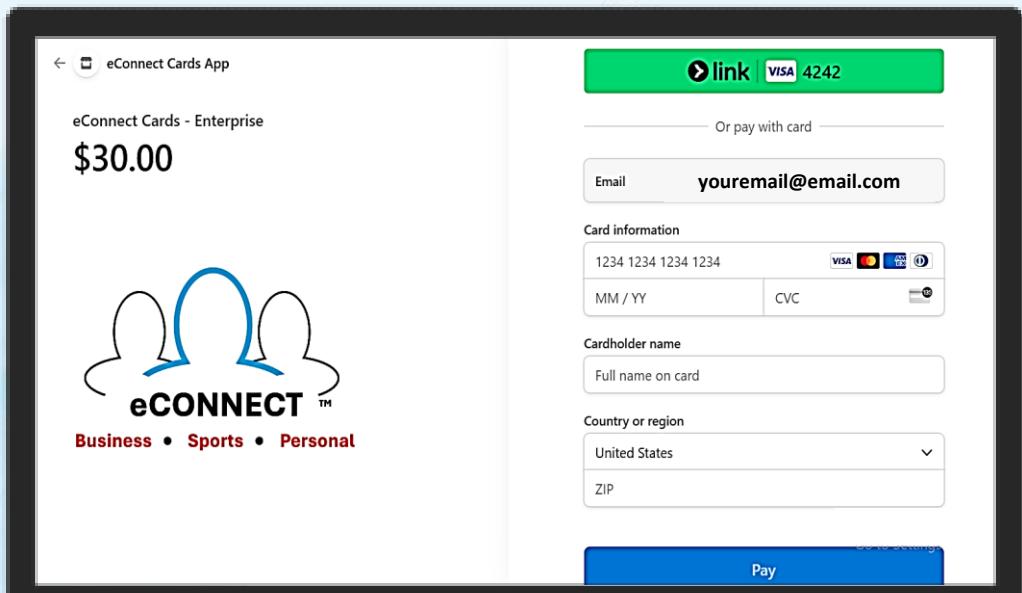


# Purchasing eConnect Enterprise Cards

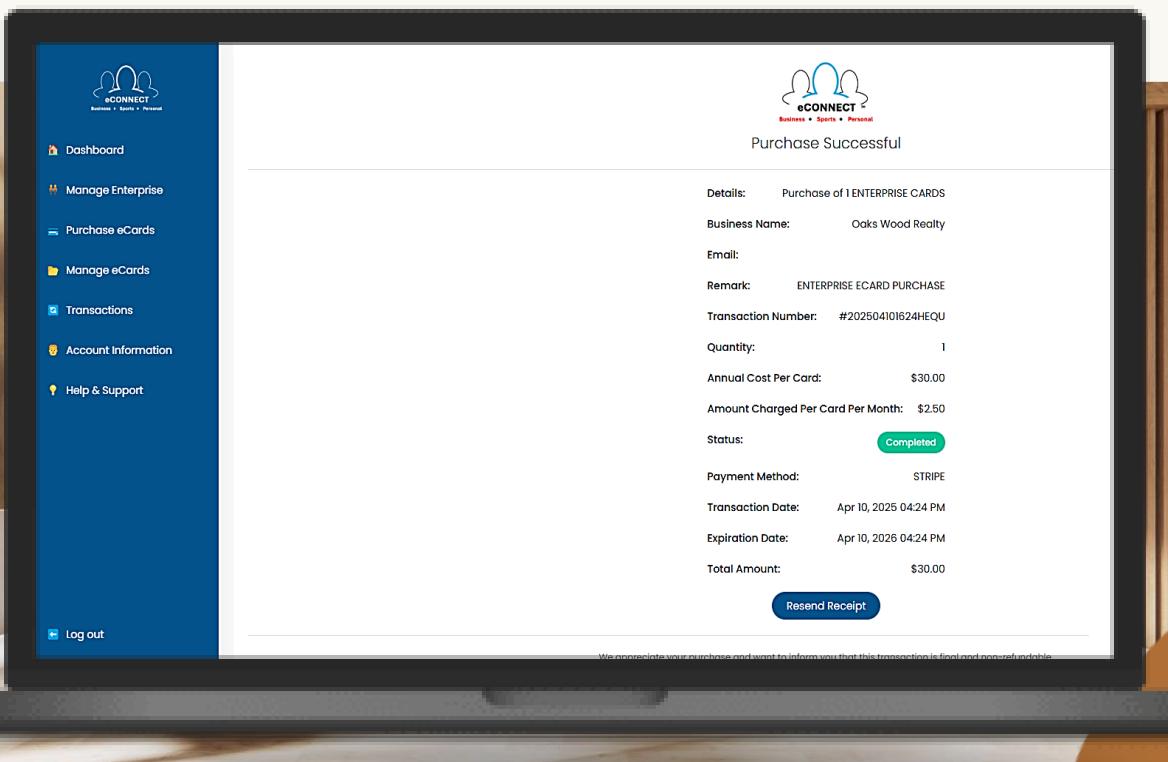


To purchase eConnect Enterprise Cards, click on the '**Purchase eCards**' tab, select the quantity of cards you wish to buy, and then click the '**Buy Now**' button to complete your purchase. Please note that all sales are final and non-refundable. The initial minimum order quantity is set at 25 cards; however, if you require a custom quantity for your small enterprise, feel free to reach out to our support team for assistance. All enterprise card purchases are billed annually.

Select your preferred payment method, provide your card information accurately, and proceed by clicking the 'Pay Now' button to finalize your payment.



Upon successful completion of your payment, the system will automatically redirect you to the **Transaction** tab, where your payment receipt and status details will be available for review.

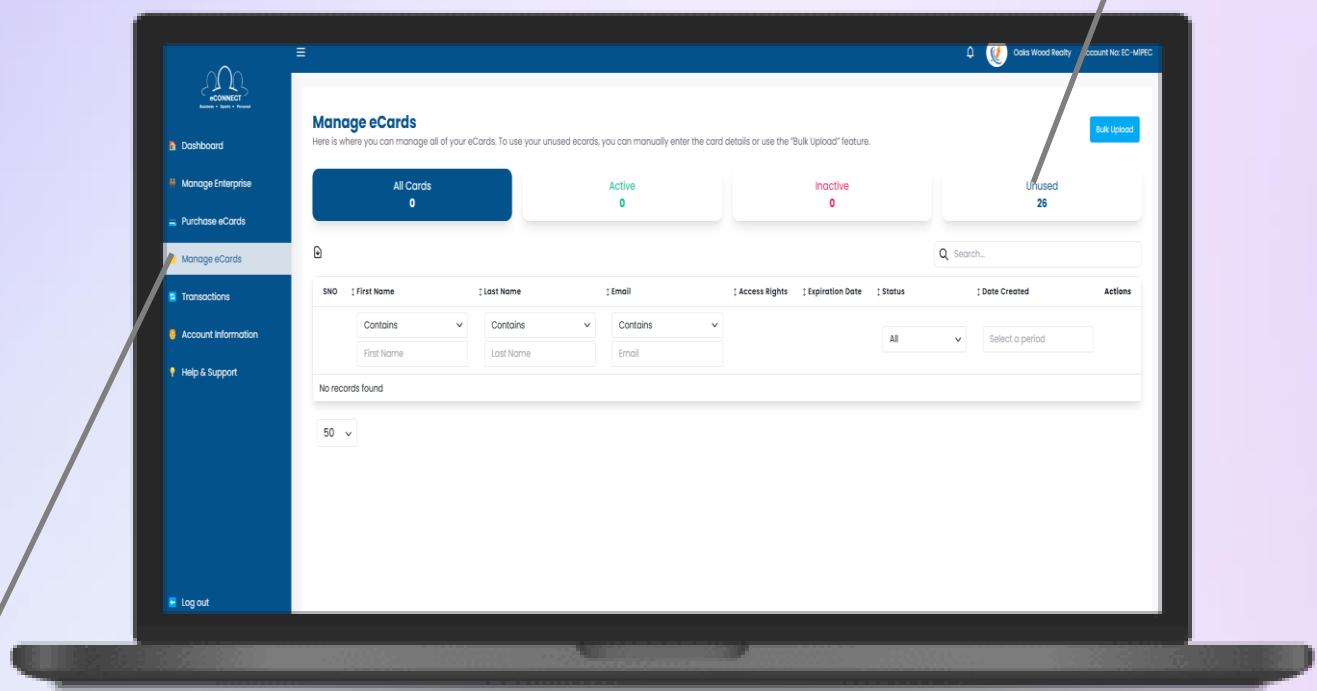


Your newly purchased enterprise cards will also be available under the **Unused Cards** section, ready for you to customize and assign. The cards will expire 1 year from the purchase date.

# Accessing the Newly Purchased Enterprise Cards

2

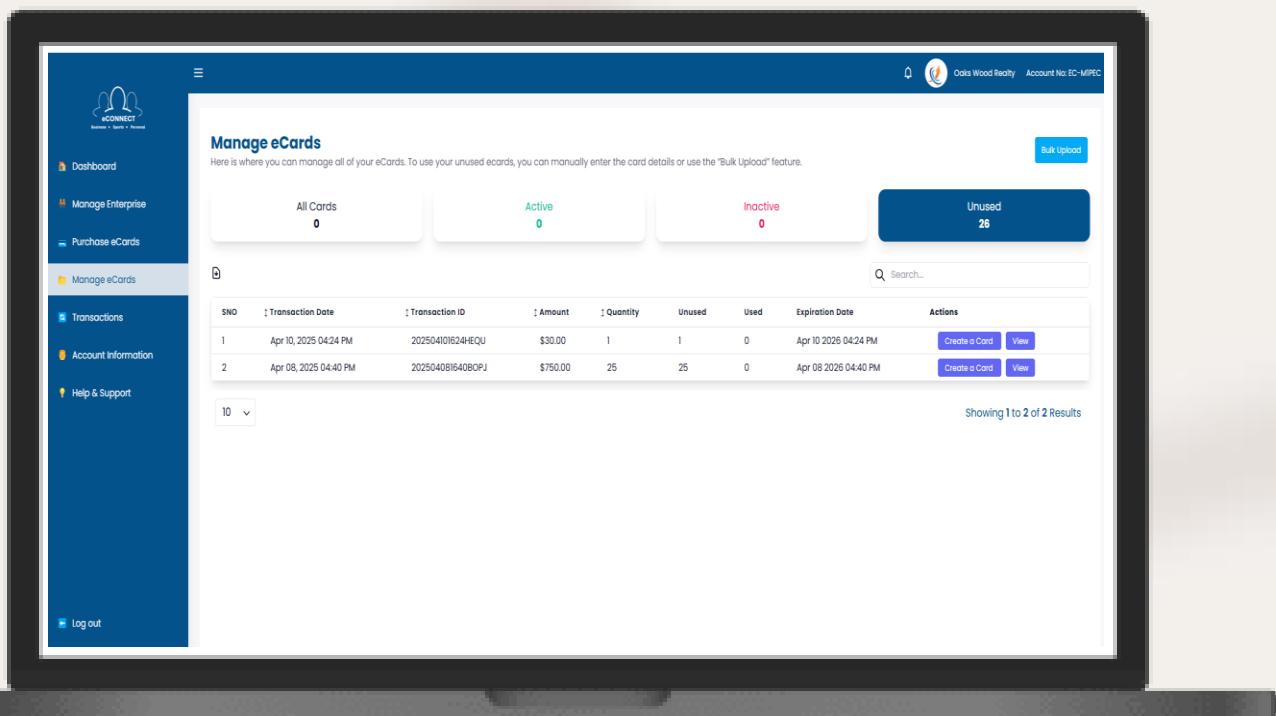
Click on the 'Unused'  
label



1

Select the 'Manage eCard' tab,

Here is a list of your recently purchased enterprise cards, which are now available for customization.



The screenshot shows a computer monitor displaying the eCONNECT Cards App. The interface is dark-themed with blue and white text. On the left, a sidebar menu includes: Dashboard, Manage Enterprise, Purchase eCards, Manage eCards (which is selected and highlighted in yellow), Transactions, Account Information, Help & Support, and Log out. The main content area is titled "Manage eCards" and displays a summary of card status: All Cards (0), Active (0), Inactive (0), and Unused (26). Below this is a table of transaction details:

SNO	Transaction Date	Transaction ID	Amount	Quantity	Unused	Used	Expiration Date	Actions
1	Apr 10, 2025 04:24 PM	202504101624HEQU	\$30.00	1	1	0	Apr 10 2026 04:24 PM	<a href="#">Create a Card</a> <a href="#">View</a>
2	Apr 08, 2025 04:40 PM	202504081640BOPJ	\$750.00	25	25	0	Apr 08 2026 04:40 PM	<a href="#">Create a Card</a> <a href="#">View</a>

At the bottom of the table, there is a page number "10" and a note "Showing 1 to 2 of 2 Results".

# Customizing and Assigning Your Unused Enterprise Cards



**Manage eCards**

Here is where you can manage all of your eCards. To use your unused eCards, you can manually enter the card details or use the "Bulk Upload" feature.

**Bulk Upload**

All Cards	Active	Inactive	Unused
0	0	0	26

**Search...**

SNO	Transaction Date	Transaction ID	Amount	Quantity	Unused	Used	Expiration Date	Actions
1	Apr 10, 2025 04:24 PM	202504101624HEQU	\$30.00	1	1	0	Apr 10 2026 04:24 PM	<b>Create eCard</b> <b>View</b>
2	Apr 08, 2025 04:40 PM	202504081640BOPJ	\$750.00	25	25	0	Apr 08 2026 04:40 PM	<b>Create eCard</b> <b>View</b>

Showing 1 to 2 of 2 Results

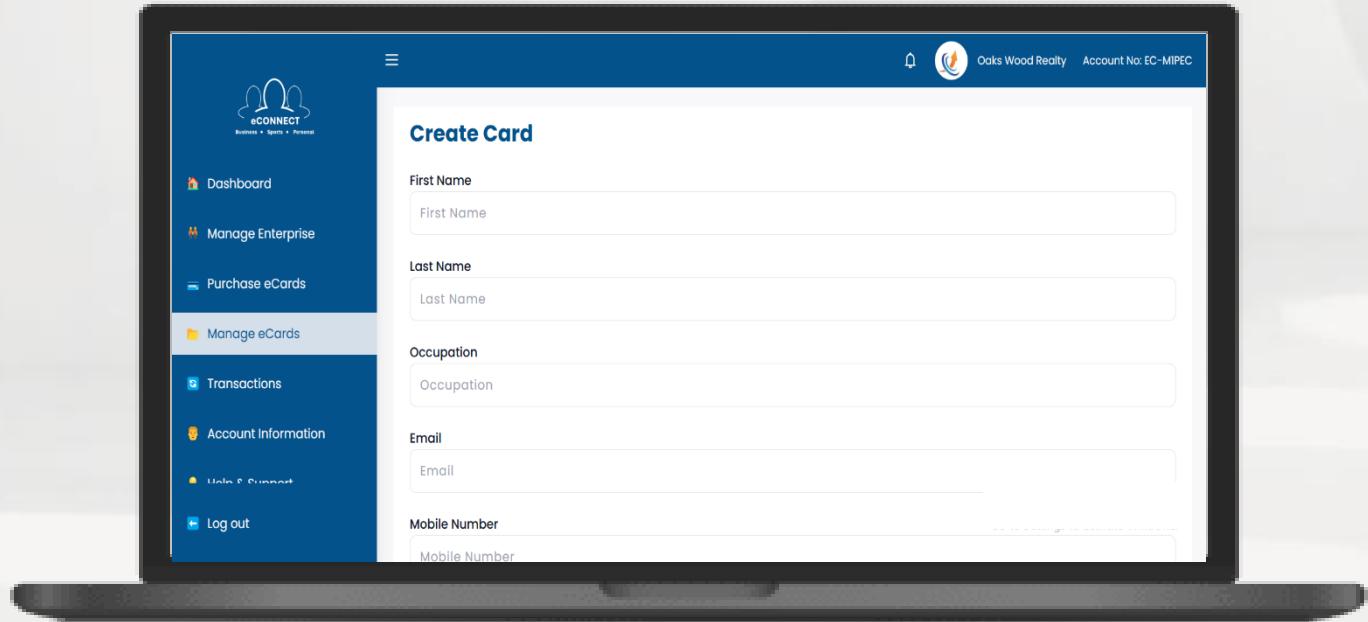
Click **'Create eCard'** to start customizing your card.

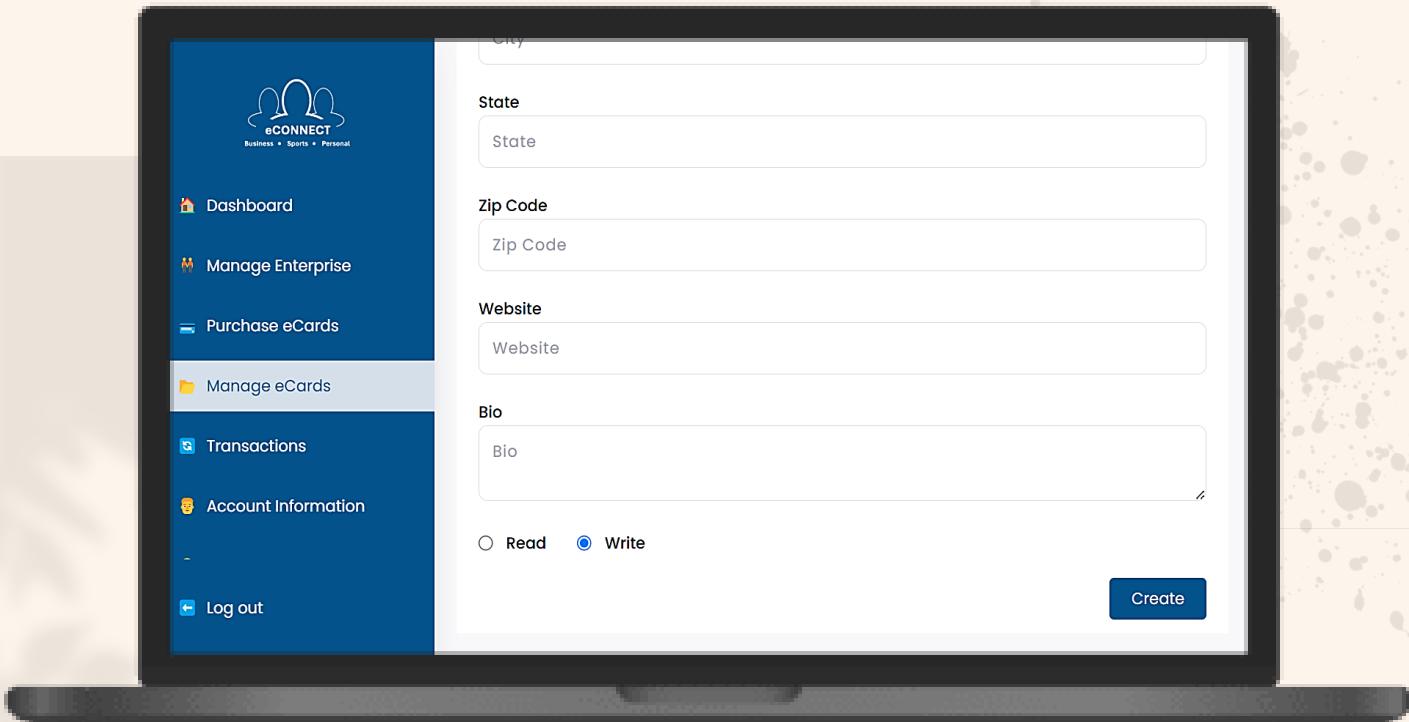
Here is where you can highlight details about the card holder – what they do, their experience, and level of expertise to help others understand their role in a way to facilitate engagement. There's a 250 character limit for the 'Bio' section which shows up in the '**About**' on the eConnect Card.

Notice that you also have the ability to assign a user "**Read**" or "**Write**" access to their card.

"**Read**" access only allows card holders to update their profile picture.

"**Write**" access allows card holders to update their profile image and personal information, but they cannot change any company information.



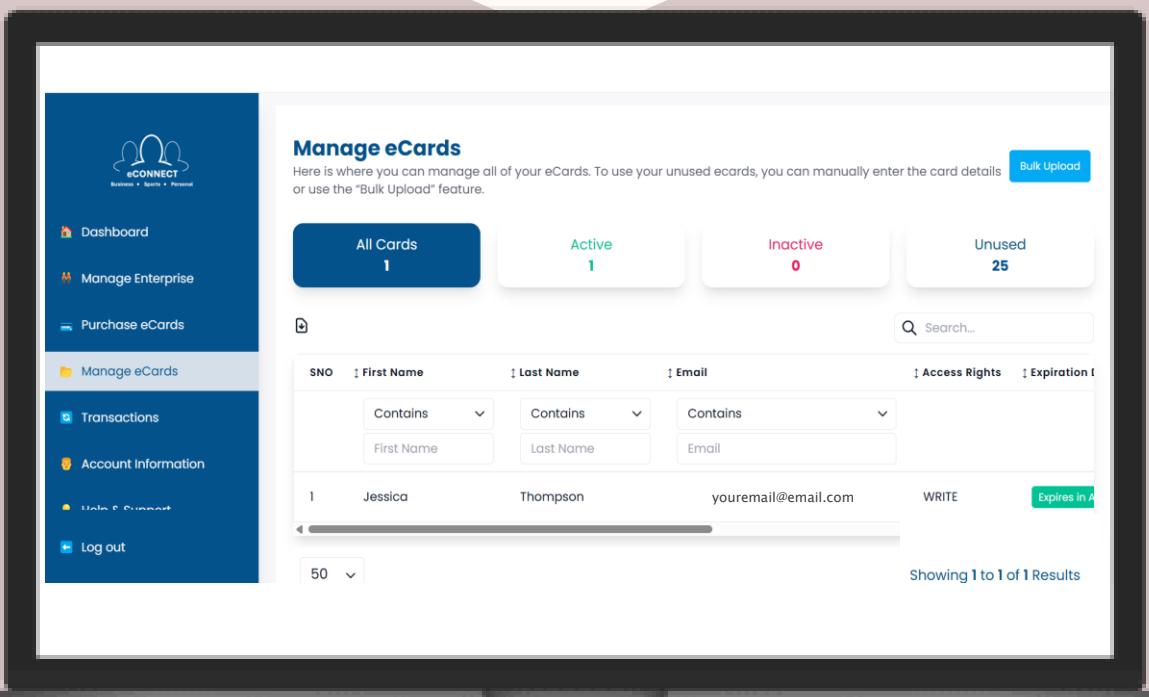


When you're done entering the card holder's card information, click the '**Create**' button to create the card.

An email will automatically be sent to the card holder with instructions on how to access their card in the eConnect Cards App.

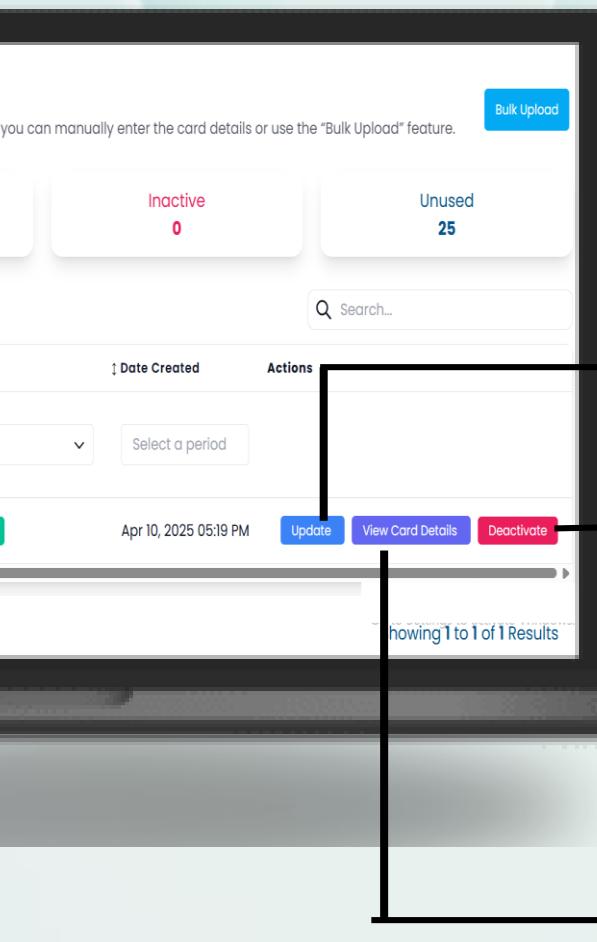
Your enterprise card has been created successfully and is now 'Active'.

To view this card, navigate to **Manage eCards** menu option and click on the '**Active**' tab. The newly created card will appear in the table.



The screenshot shows a computer monitor displaying the eCONNECT app. The left sidebar has a dark blue background with white icons and text for Dashboard, Manage Enterprise, Purchase eCards, Manage eCards (which is highlighted in yellow), Transactions, Account Information, Help & Support, and Log out. The main content area has a white background. At the top, it says 'Manage eCards' with a sub-instruction: 'Here is where you can manage all of your eCards. To use your unused eCards, you can manually enter the card details or use the "Bulk Upload" feature.' Below this are four buttons: 'All Cards' (1), 'Active' (1), 'Inactive' (0), and 'Unused' (25). A search bar with 'Search...' placeholder text is to the right. The main table has columns for SNO, First Name, Last Name, Email, Access Rights, and Expiration. The first row shows a card for 'Jessica Thompson' with email 'youremail@email.com', access rights 'WRITE', and an expiration date 'Expires in A'. At the bottom of the table are dropdowns for page number (50) and a 'Showing 1 to 1 of 1 Results' message.

# Other Manage eCard Features



Update

Deactivate

View

In addition to customization and assignment, there are several other key features you can use to manage your eConnect Enterprise Cards:

- 1. View** Card Details – Access detailed information about each card, including its current status, assigned user, access permissions and expiration.
- 2. Deactivate** Cards – Temporarily disable a card, preventing users from sharing it until reactivated.
- 3. Update** Cards – Edit the card details information for the card holder including permission assignment.

# Updating an Enterprise Card



## Method 1

Click on the 'Update' button of the card you wish to update.

**Manage eCards**

Here is where you can manage all of your eCards. To use your unused eCards, you can manually enter the card details or use the "Bulk Upload" feature.

**All Cards** 3      **Active** 3      **Inactive** 0      **Unused** 22

**Actions**

Email	Access Rights	Expiration Date	Status	Date Created	Actions
john@123.com	READ	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>
jane@123.com	WRITE	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>
robert@123.com	READ	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>

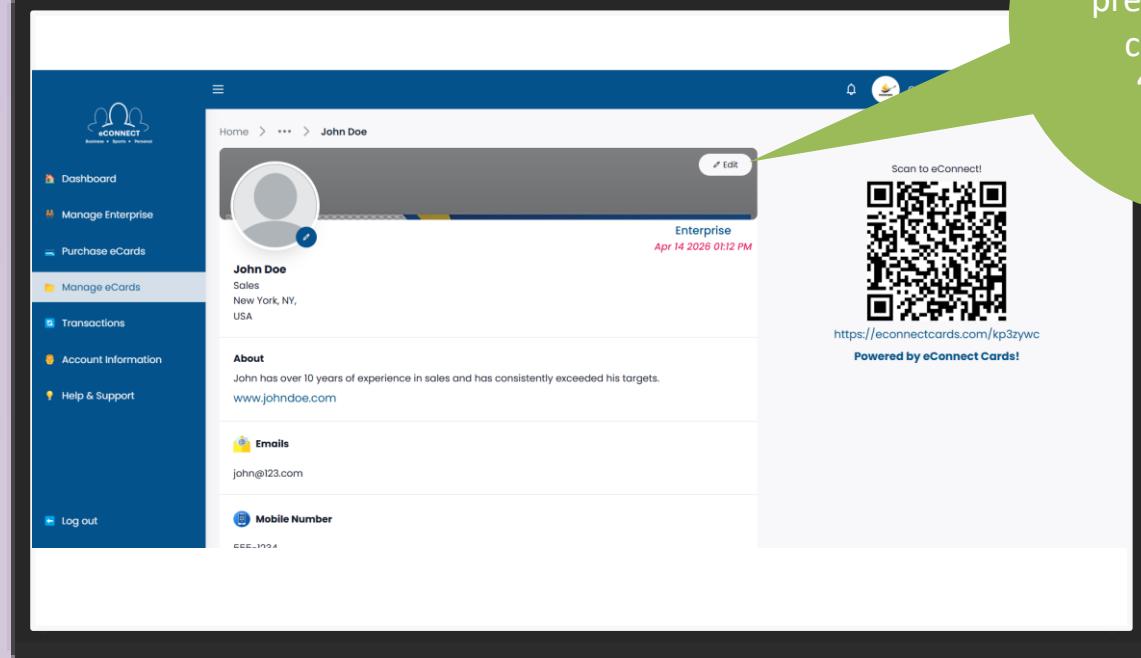
Showing 1 to 3 of 3 Results

## Method 2

Click on the Email Address of the card holder you want to update.

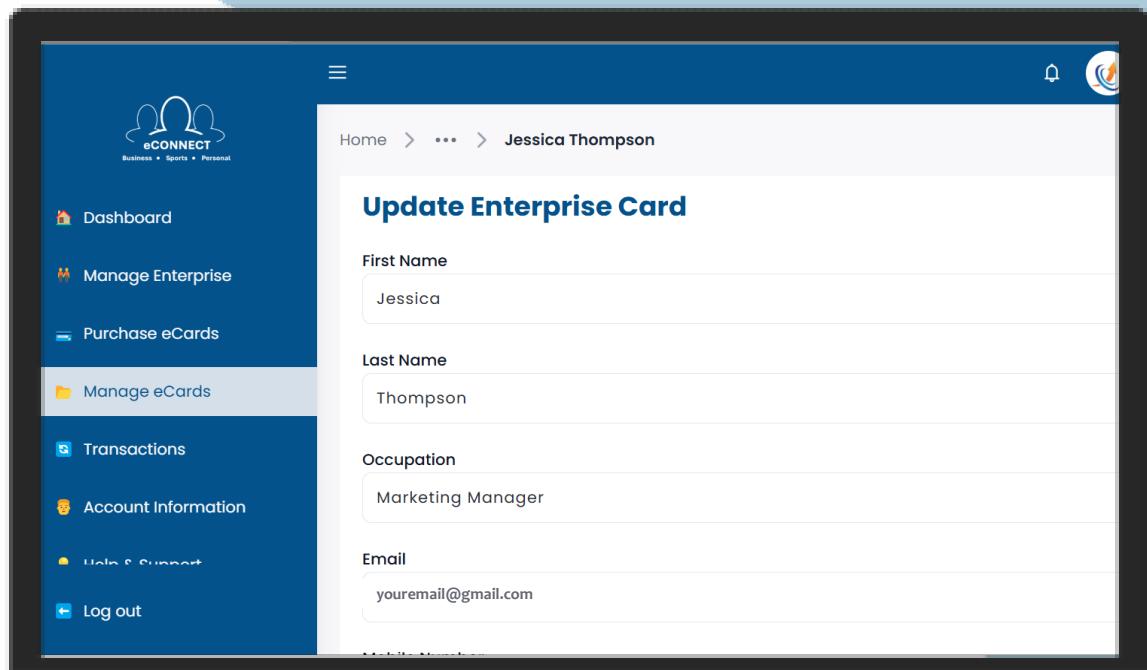
SNO	First Name	Last Name	Email	Access Rights	Expiration Date
1	John	Doe	john@123.com	READ	Expires in Apr 14, 2026 01:12 PM
2	Huna	Smith	jane@123.com	WRITE	Expires in Apr 14, 2026 01:12 PM

From the preview screen, click on the 'Edit' icon



The screenshot shows the eCONNECT Cards App interface. On the left is a sidebar with navigation options: Dashboard, Manage Enterprise, Purchase eCards, Manage eCards, Transactions, Account Information, Help & Support, and Log out. The main content area displays a card for 'John Doe' with the following details: Sales, New York, NY, USA. The card is marked as 'Enterprise' and has an expiration date of 'Apr 14 2026 01:12 PM'. Below the card, there are sections for 'About' (a brief bio and a link to www.johndoe.com), 'Emails' (john@123.com), and 'Mobile Number' (555-1234). A QR code is present with the URL 'https://econnectcards.com/kp3zywc' and the text 'Powered by eConnect Cards!'. A green callout bubble points to the 'Edit' icon (a pencil icon) located on the card's header.

After clicking either the 'Update' button or the 'Edit' icon, you will be taken to the card details page, where you can edit the information as desired. Once you've finished, click the 'Update' button to save your changes.



The screenshot shows a mobile application interface for 'eCONNECT'. The top navigation bar includes the 'eCONNECT' logo and links for 'Business', 'Sports', and 'Personal'. The main navigation menu on the left side lists: 'Dashboard', 'Manage Enterprise', 'Purchase eCards', 'Manage eCards' (which is highlighted in blue), 'Transactions', 'Account Information', 'Help & Support', and 'Log out'. The current page is 'Update Enterprise Card' for 'Jessica Thompson'. The page displays five input fields: 'First Name' (Jessica), 'Last Name' (Thompson), 'Occupation' (Marketing Manager), and 'Email' (youremail@gmail.com). The 'Update' button is located at the bottom of the form.

# Viewing an Enterprise Card Details

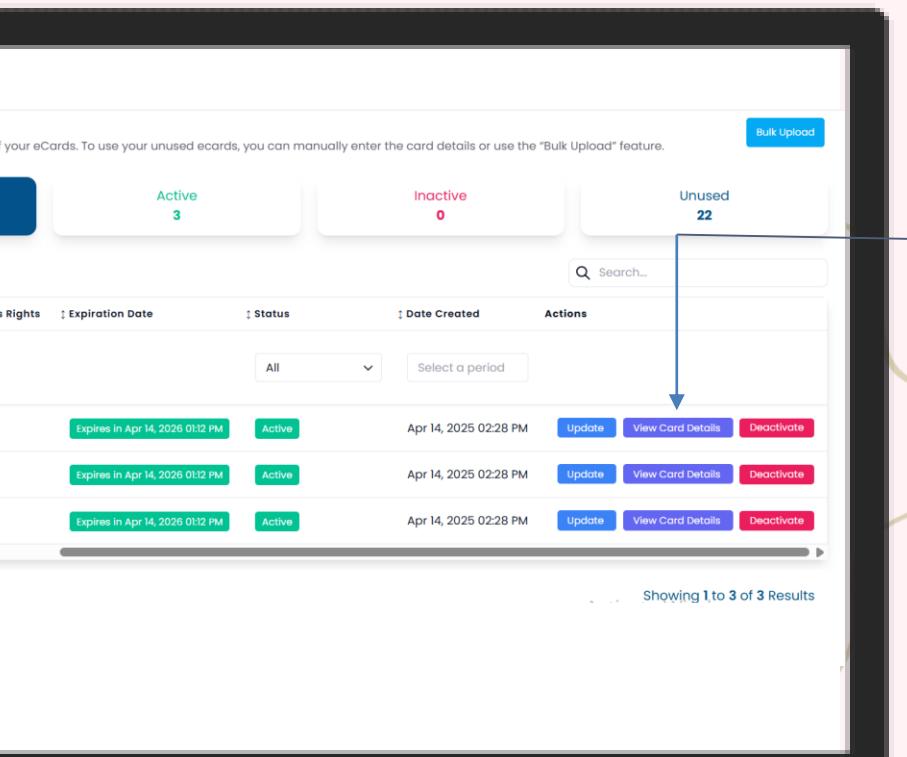
## Method 1

Click on the Email Address \_\_\_\_\_  
of the card holder you  
wish to view.

SNO	First Name	Last Name	Email	Access Rights	Expiration Date
1	John	Doe	john@123.com	READ	Expires in Apr 14, 2026 01:12 PM
2	Huna	Smith	jane@123.com	WRITE	Expires in Apr 14, 2026 01:12 PM
3	Kelvin	Brown	robert@123.com	READ	Expires in Apr 14, 2026 01:12 PM

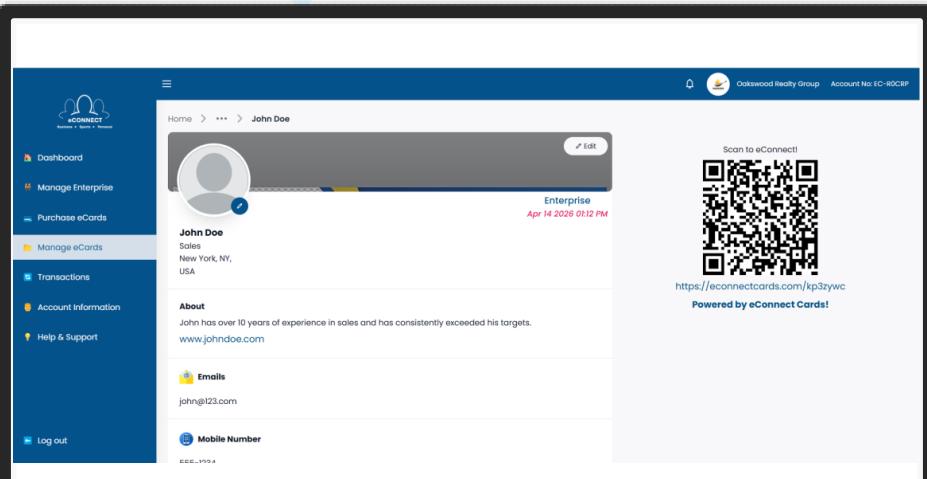
## Method 2

Click the  
**'View Card Details'**  
button to view card  
information.

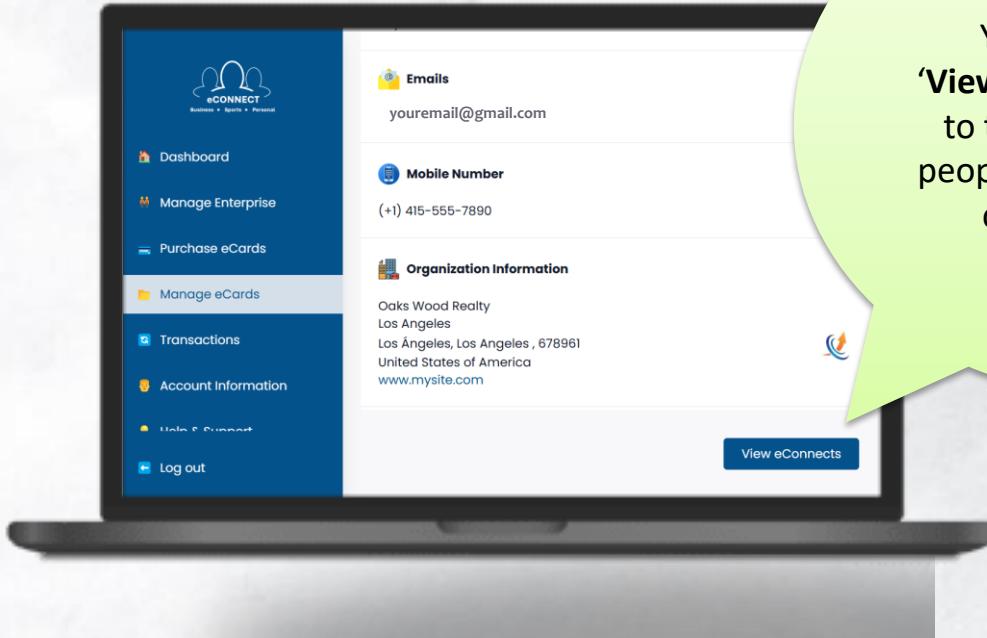


Your eCards. To use your unused eCards, you can manually enter the card details or use the "Bulk Upload" feature.				
<a href="#">Bulk Upload</a>				
Rights	Expiration Date	Status	Date Created	Actions
Active	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>
Unused	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>
Unused	Expires in Apr 14, 2026 01:12 PM	Active	Apr 14, 2025 02:28 PM	<a href="#">Update</a> <a href="#">View Card Details</a> <a href="#">Deactivate</a>

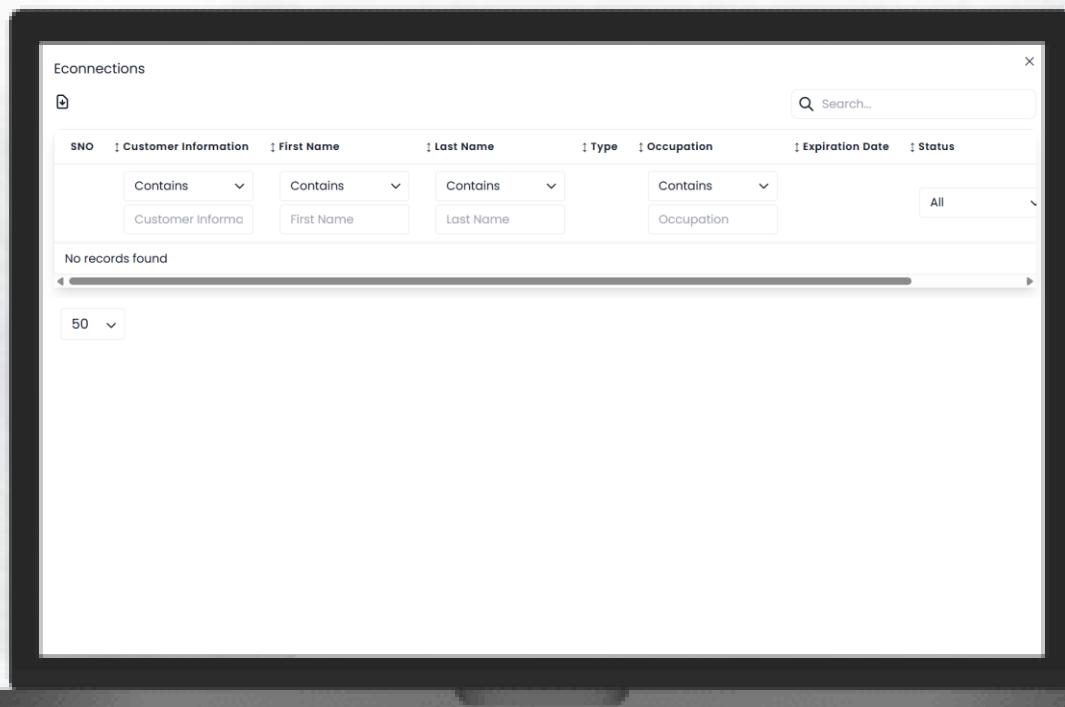
You will be taken to the card details screen, where you can view all the information of the Enterprise card holder.



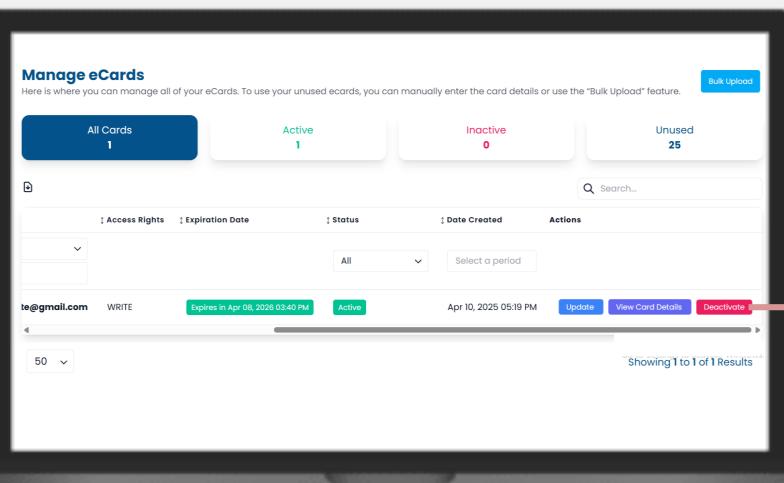
# Card Holder eConnection



You can click the 'View eConnects' button to the view the list of people a card holder has connected with.

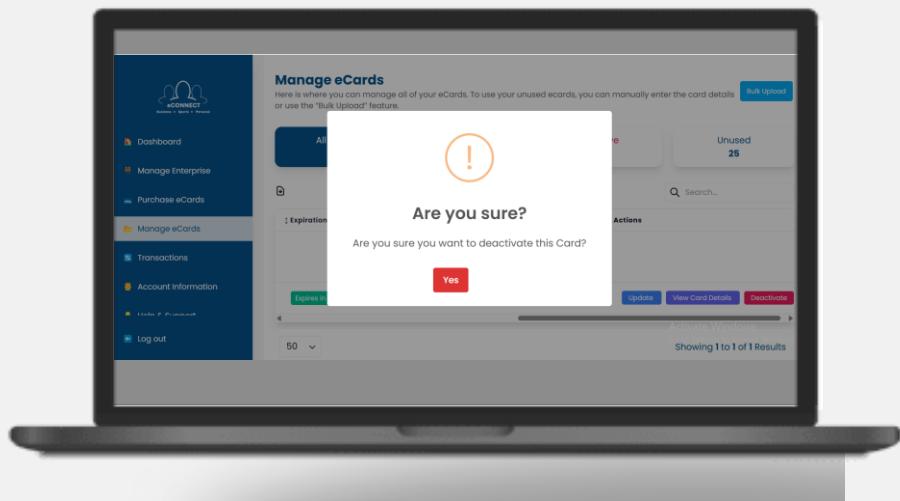


# Deactivating an Enterprise Card



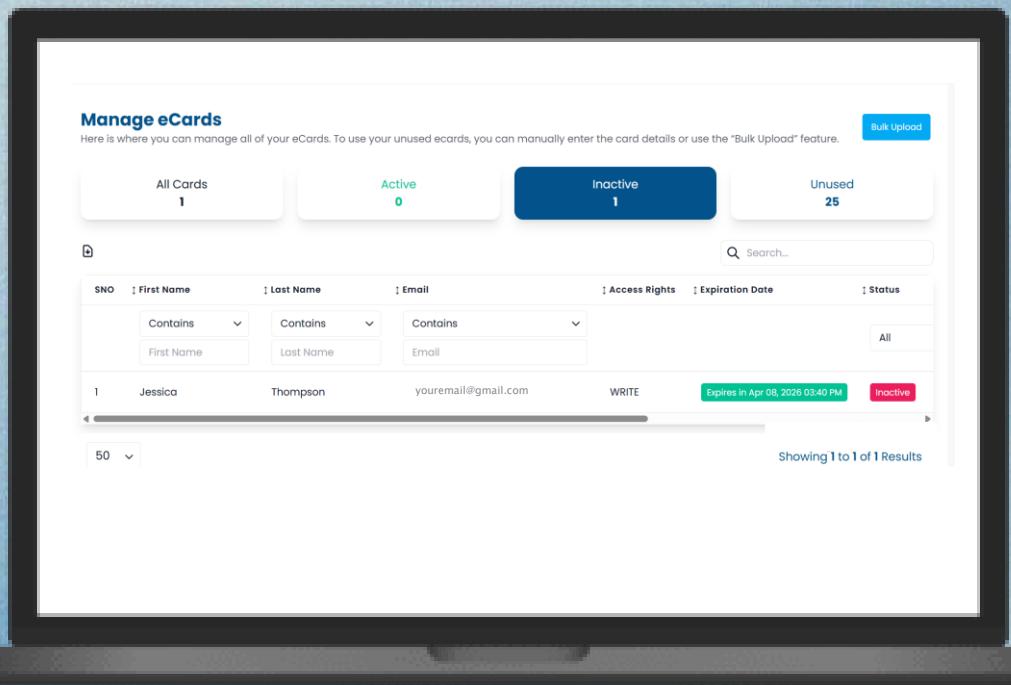
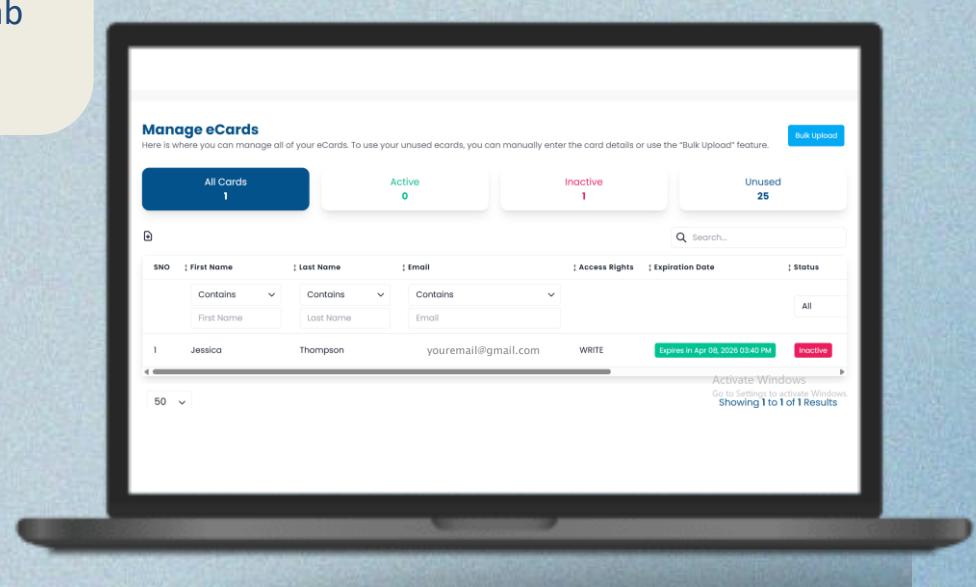
To deactivate a card associated with a card holder, click the '**Deactivate**' button. A confirmation prompt would be displayed to verify your action before proceeding

Click on the '**Yes**' button to confirm your action



# Accessing the deactivated Cards

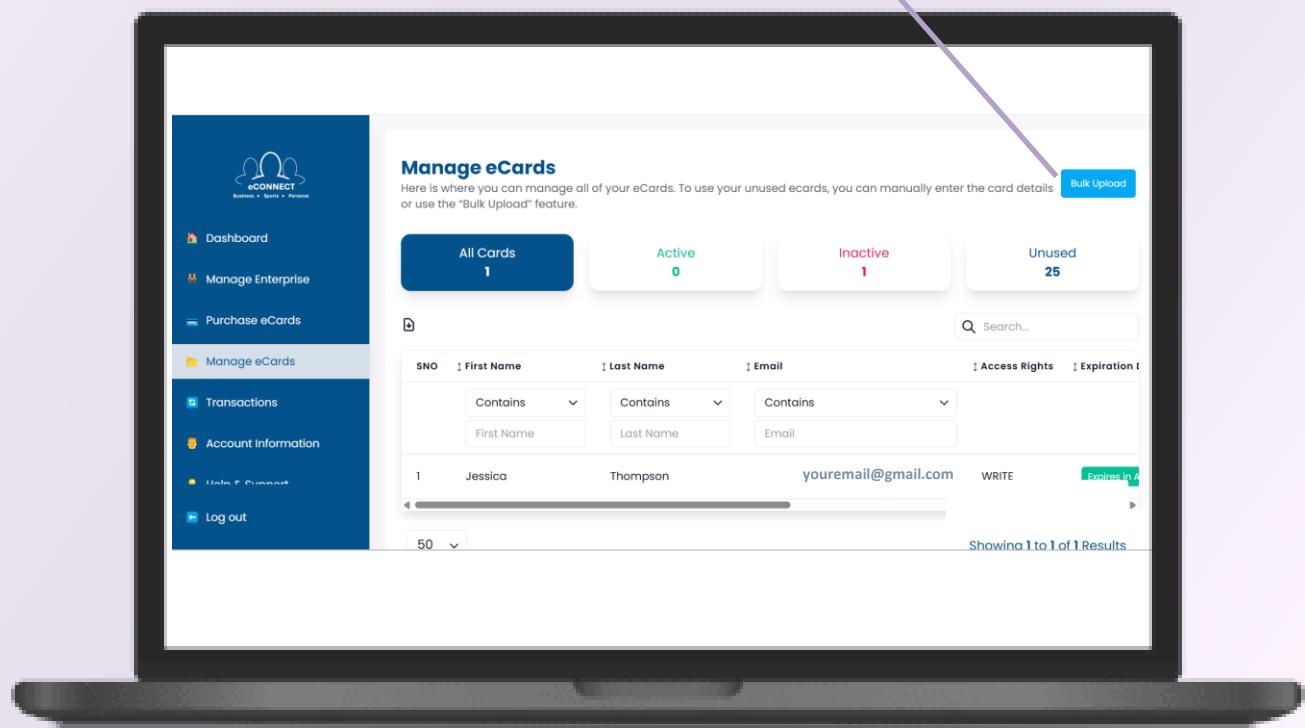
To see a list of deactivated cards, click on the 'Inactive' tab



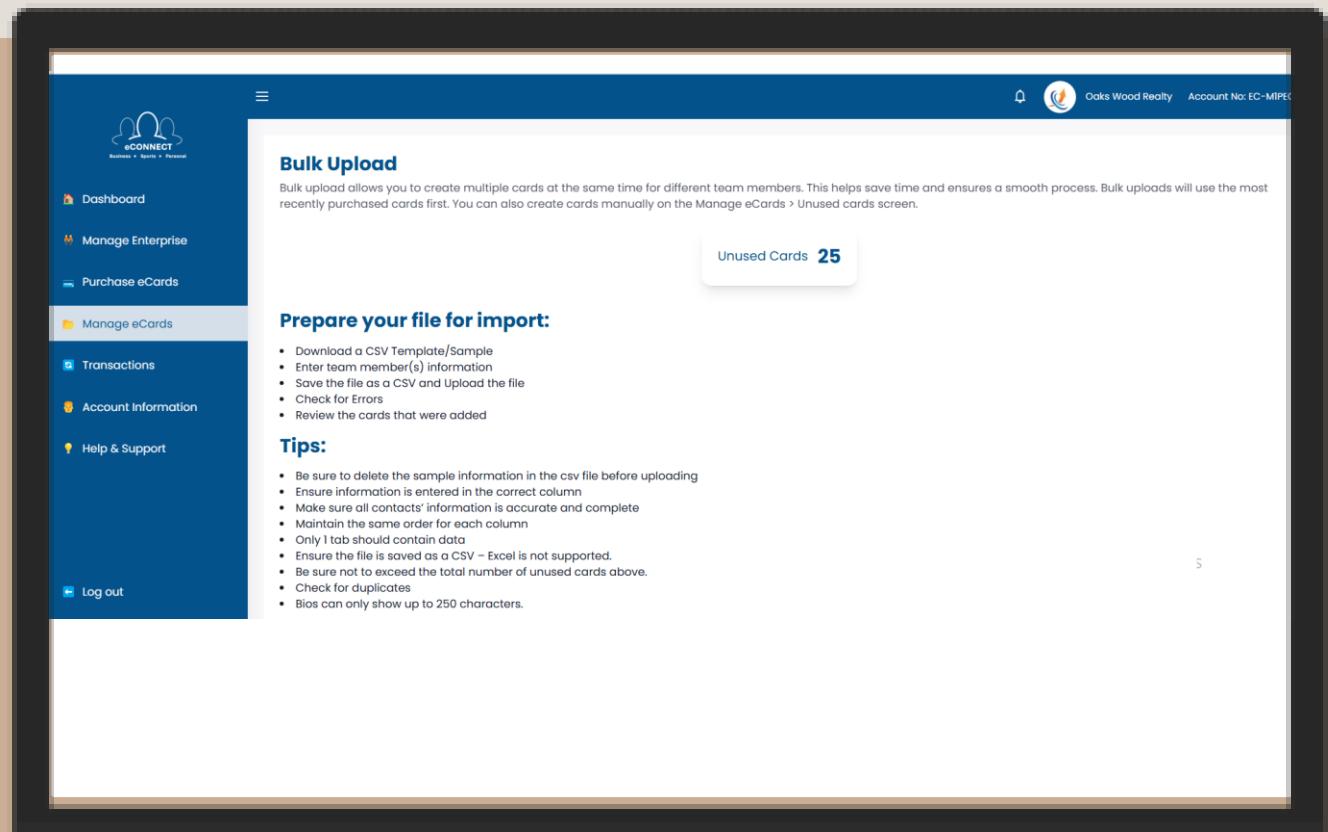
# Creating Enterprise Cards through Bulk Upload

The **Bulk Upload** option on the Enterprise Portal lets you import card holders' details in a CSV file to create multiple cards at one time. After a successful upload, the system will use the imported details to create cards for each card holder on the portal. Ensure that the details in the file match the format of the sample template provided on the portal.

Click on the 'Bulk Upload' button



Read the provided tips and follow the instructions to ensure your CSV file is properly formatted.



The screenshot shows the eCONNECT Cards App interface. The left sidebar has a dark blue background with white icons and text:

- Dashboard
- Manage Enterprise
- Purchase eCards
- Manage eCards** (highlighted in light blue)
- Transactions
- Account Information
- Help & Support
- Log out

The main content area has a white background. At the top, there is a blue header bar with the eCONNECT logo, a bell icon, the text "Oaks Wood Realty", and "Account No: EC-MIPEC".

**Bulk Upload**

Bulk upload allows you to create multiple cards at the same time for different team members. This helps save time and ensures a smooth process. Bulk uploads will use the most recently purchased cards first. You can also create cards manually on the Manage eCards > Unused cards screen.

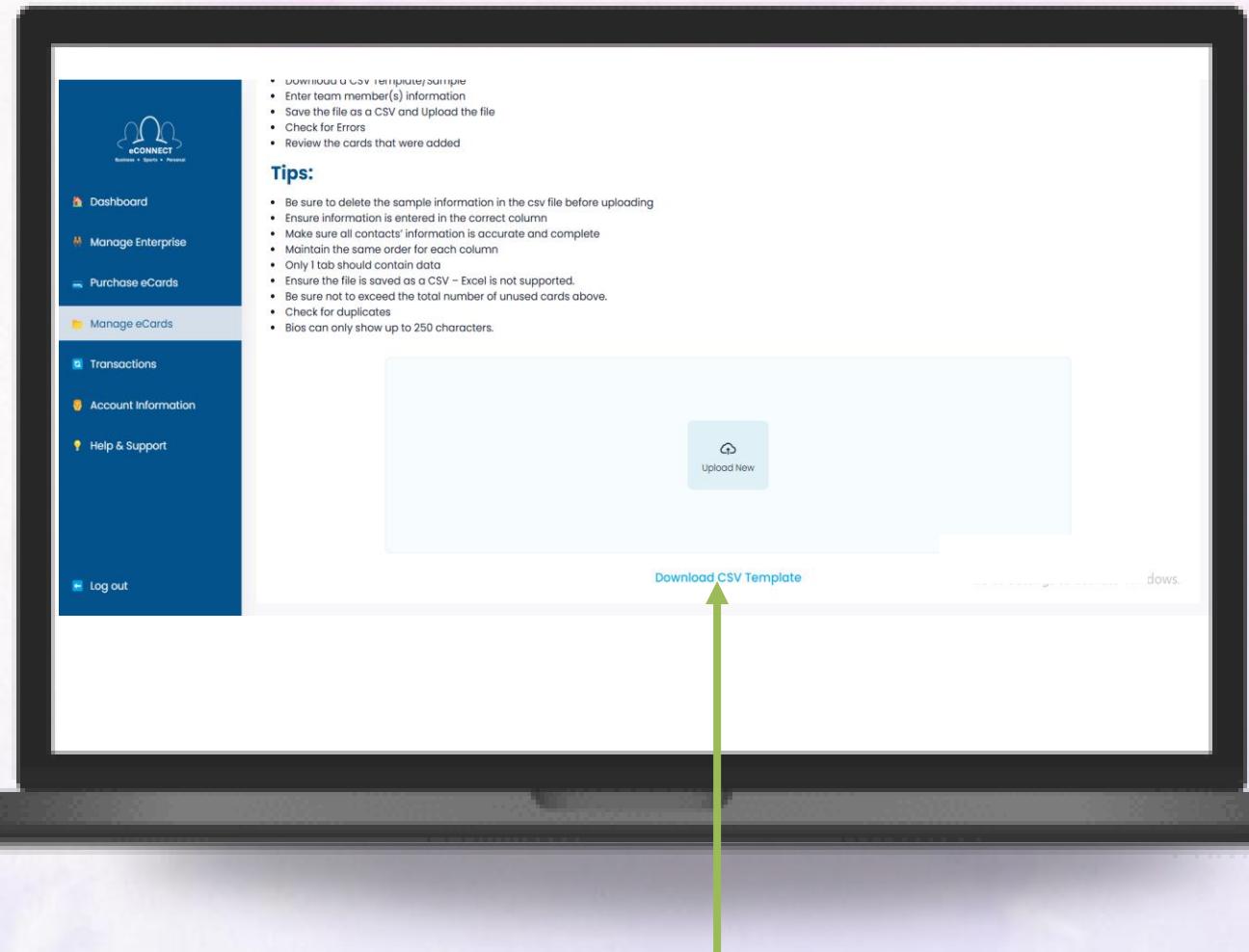
**Unused Cards 25**

**Prepare your file for import:**

- Download a CSV Template/Sample
- Enter team member(s) information
- Save the file as a CSV and Upload the file
- Check for Errors
- Review the cards that were added

**Tips:**

- Be sure to delete the sample information in the csv file before uploading
- Ensure information is entered in the correct column
- Make sure all contacts' information is accurate and complete
- Maintain the same order for each column
- Only 1 tab should contain data
- Ensure the file is saved as a CSV – Excel is not supported.
- Be sure not to exceed the total number of unused cards above.
- Check for duplicates
- Bios can only show up to 250 characters.



The screenshot shows the eCONNECT Cards App interface. On the left is a dark blue sidebar with the eCONNECT logo and navigation links: Dashboard, Manage Enterprise, Purchase eCards, Manage eCards, Transactions, Account Information, Help & Support, and Log out. The main content area has a light gray background. At the top, there is a section titled 'Download CSV Template' with a list of instructions:

- Download a CSV template sample
- Enter team member(s) information
- Save the file as a CSV and Upload the file
- Check for Errors
- Review the cards that were added

Below this is a section titled 'Tips:' with a list of tips for uploading CSV files:

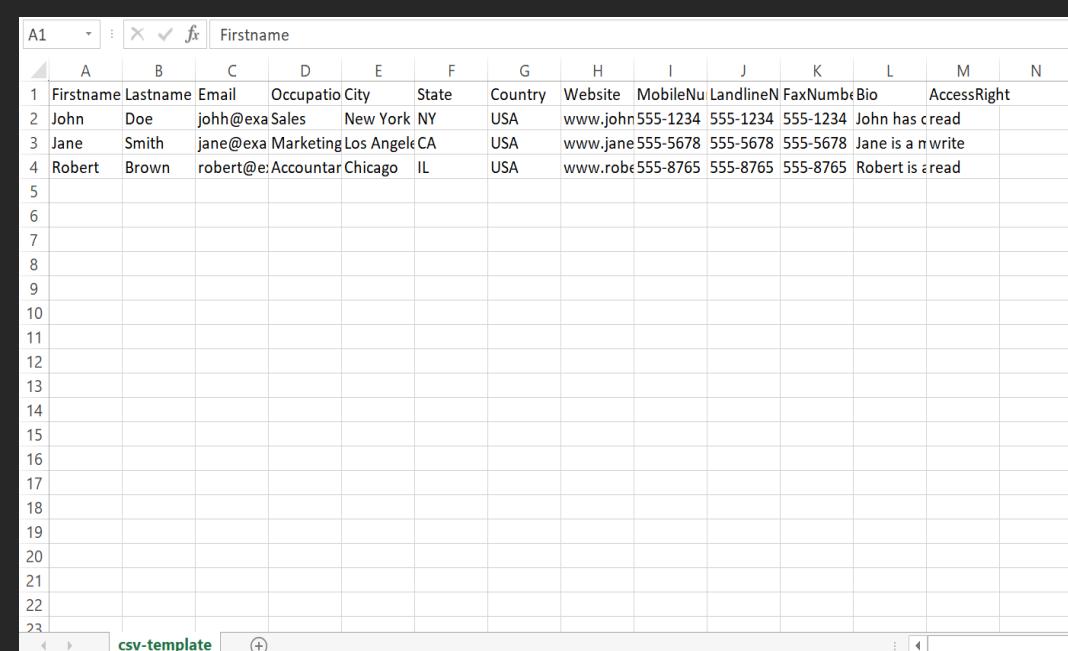
- Be sure to delete the sample information in the csv file before uploading
- Ensure information is entered in the correct column
- Make sure all contacts' information is accurate and complete
- Maintain the same order for each column
- Only 1 file should contain data
- Ensure the file is saved as a CSV – Excel is not supported.
- Be sure not to exceed the total number of unused cards above.
- Check for duplicates
- Bios can only show up to 250 characters.

In the center of the main content area is a large, light gray rectangular box with a 'Upload New' button containing a cloud icon. At the bottom of this box, there is a 'Download CSV Template' link. A green arrow points upwards from the text 'Click "Download CSV Template" to view the sample format. Use the template provided as a guide to prepare your CSV file for upload. After creating and formatting your file, you can upload it.' to the 'Download CSV Template' link.

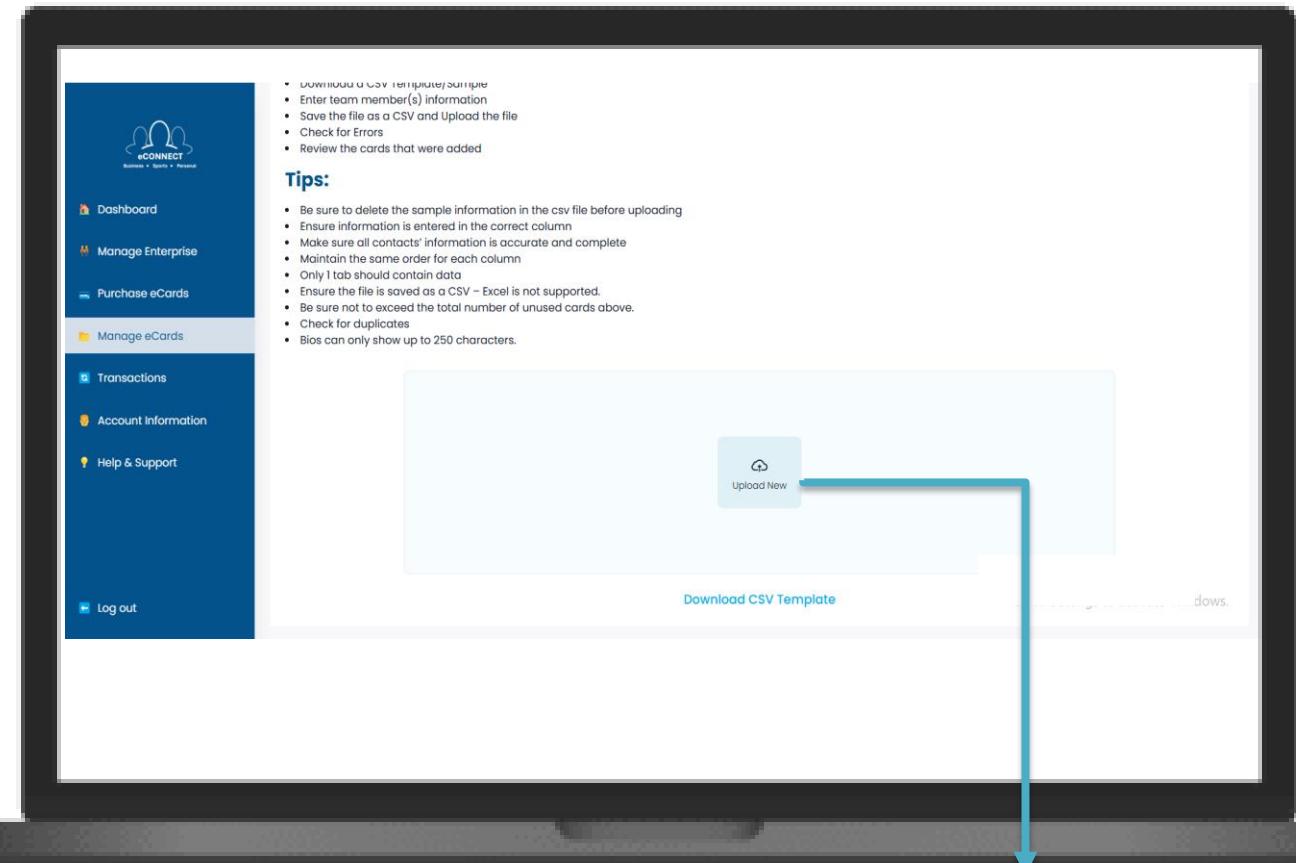
Click “Download CSV Template” to view the sample format. Use the template provided as a guide to prepare your CSV file for upload. After creating and formatting your file, you can upload it.

Please ensure that you adhere to the formats provided in the template when formatting your details.

**Note:** The entries are case sensitive. The way you enter the information is the way it will show up in the mobile app for the cardholder.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Firstname	Lastname	Email	Occupation	City	State	Country	Website	MobileNu	LandlineN	FaxNumbe	Bio	AccessRight	
2	John	Doe	johh@exa	Sales	New York	NY	USA	www.john	555-1234	555-1234	555-1234	John has c	read	
3	Jane	Smith	jane@exa	Marketing	Los Angele	CA	USA	www.jane	555-5678	555-5678	555-5678	Jane is a n	write	
4	Robert	Brown	robert@exa	Accountant	Chicago	IL	USA	www.robe	555-8765	555-8765	555-8765	Robert is c	read	
5														
6														
7														
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														



Download CSV Template

Upload New

**Tips:**

- Download CSV Template
- Enter team member(s) information
- Save the file as a CSV and Upload the file
- Check for Errors
- Review the cards that were added

Click on '**Upload New**' icon and select your prepared **csv** you want to upload. Be sure you have enough unused cards for the quantity of card holders entered on the CSV.

After selecting your file, a preview will be displayed showing the status of the uploaded file (e.g., **Valid** or **Invalid**).

**Note:**

- If the status is **Invalid**, click the '**Tips: How to fix invalid entries**' link to resolve the issues. Then reattempt your CSV upload and validate your entries before finalizing your import
- If the status is **Valid**, click the '**Import**' button to upload your entries.

### CSV Upload Preview

This page displays a preview of the CSV upload and validates the information. If any invalid entries exist, correct them in the CSV file and re-upload the CSV file. Use the tips to ensure all guidelines are followed.

If the information is validated and looks accurate, please proceed with the import by clicking the blue 'Import' button at the bottom. Only 'Valid' rows will be imported.

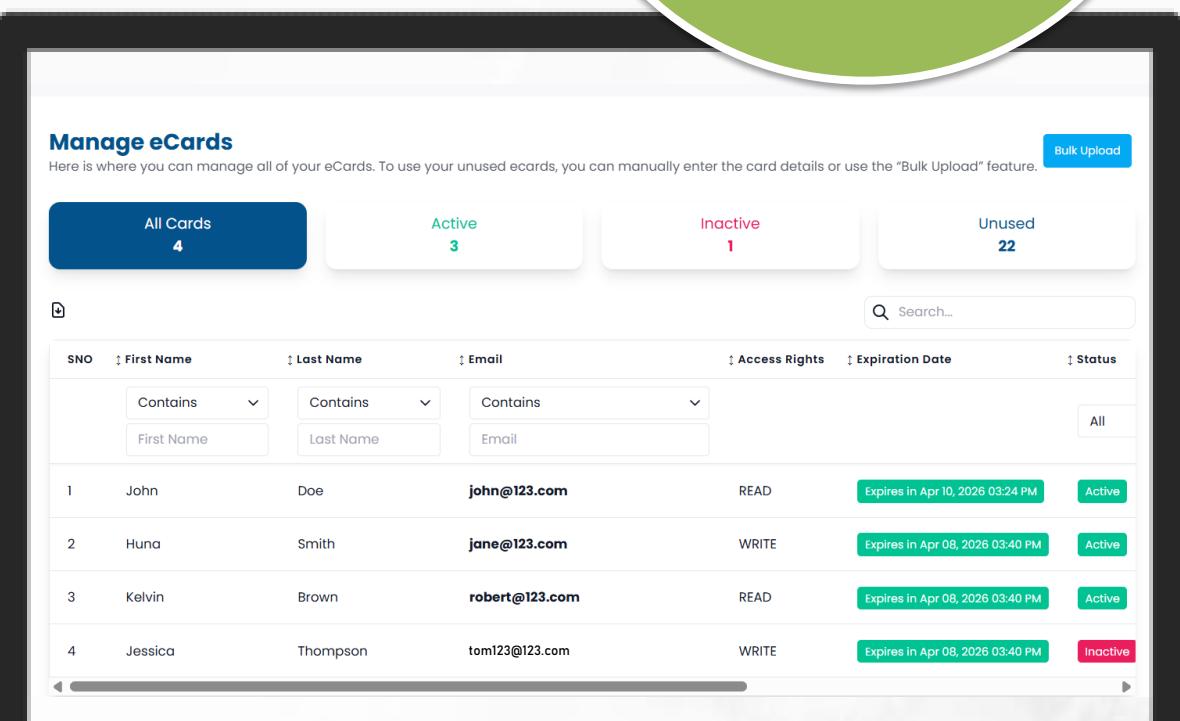
[Tips - How to fix invalid entries?](#)

SNO	STATUS	FIRST NAME	LAST NAME	OCCUPATION	EMAIL	BIO
1	 Valid	John	Doe	Sales	john@l23.com	John has over 10 years of experience in sales and has consistently exceeded his targets.
2	 Valid	Huna	Smith	Marketing	jane@l23.com	Jane is a marketing expert with a passion for digital campaigns and brand strategy.
3	 Valid	Kelvin	Brown	Accountant	robert@l23.com	Robert is a certified accountant with a keen eye for detail and a strong background in financial analysis.

[Cancel](#)

[Import](#)

Upon successfully importing the valid card holders details, an email will automatically be sent with instructions on how to access their card.



**Manage eCards**

Here is where you can manage all of your eCards. To use your unused eCards, you can manually enter the card details or use the "Bulk Upload" feature.

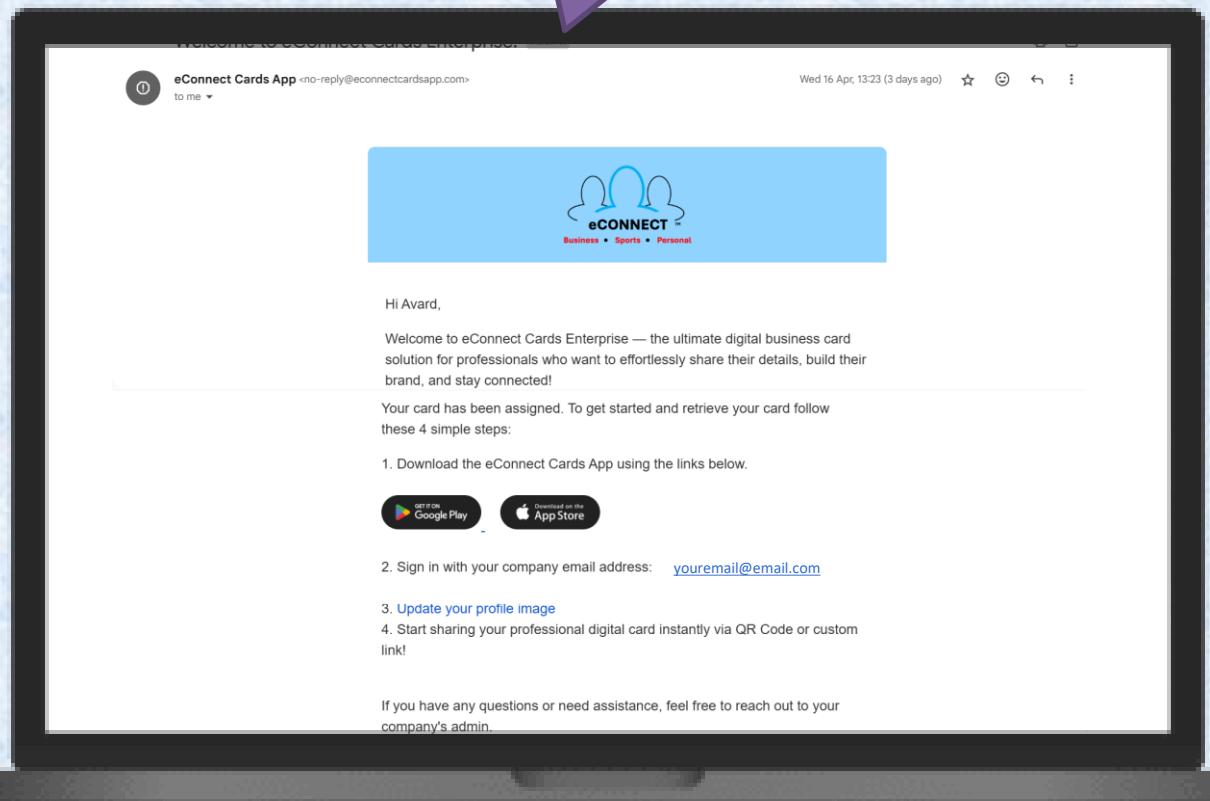
**Bulk Upload**

All Cards	Active	Inactive	Unused
4	3	1	22

**Search...**

SNO	First Name	Last Name	Email	Access Rights	Expiration Date	Status
1	John	Doe	john@123.com	READ	Expires in Apr 10, 2026 03:24 PM	Active
2	Huna	Smith	jane@123.com	WRITE	Expires in Apr 08, 2026 03:40 PM	Active
3	Kelvin	Brown	robert@123.com	READ	Expires in Apr 08, 2026 03:40 PM	Active
4	Jessica	Thompson	tom123@123.com	WRITE	Expires in Apr 08, 2026 03:40 PM	Inactive

Sample Email  
Notification sent  
to each registered  
Card Holders.



The image shows a screenshot of an email inbox on a laptop screen. The email is from 'eConnect Cards App <no-reply@econnectcardsapp.com>' to the recipient 'me'. The subject line is 'Welcome to eConnect Cards Enterprise'. The email body includes a blue header with the eCONNECT logo and text: 'Welcome to eConnect Cards Enterprise — the ultimate digital business card solution for professionals who want to effortlessly share their details, build their brand, and stay connected!'. It then provides instructions for getting started: 'Your card has been assigned. To get started and retrieve your card follow these 4 simple steps:'. Step 1: 'Download the eConnect Cards App using the links below.' with links to Google Play and the App Store. Step 2: 'Sign in with your company email address: [youremail@email.com](mailto:youremail@email.com)'. Step 3: 'Update your profile image'. Step 4: 'Start sharing your professional digital card instantly via QR Code or custom link!'. The email ends with a note: 'If you have any questions or need assistance, feel free to reach out to your company's admin.' The laptop is shown from a side-on perspective.



**NEXT: Accessing the eConnect  
Enterprise Cards on the Mobile  
App**

# Getting Started

## Download & Install the App

1 Open the Apple Store or Google Play Store

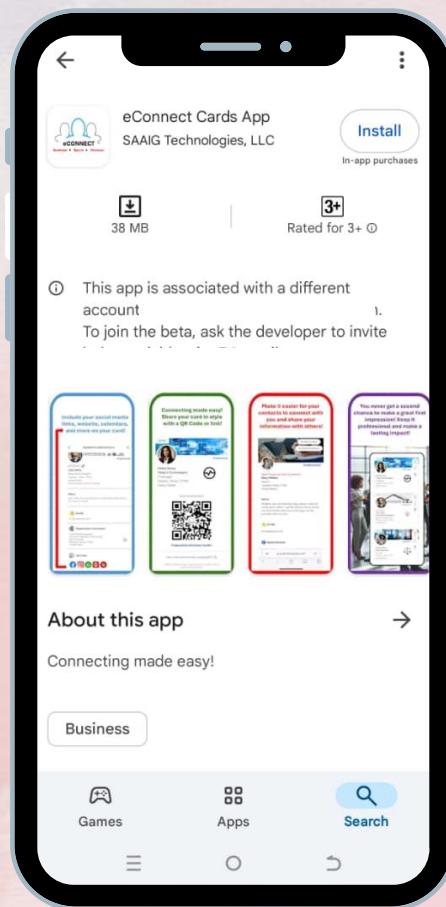
2 Search for "eConnect Cards App"

3 Locate the App

4 Tap "Install"

5

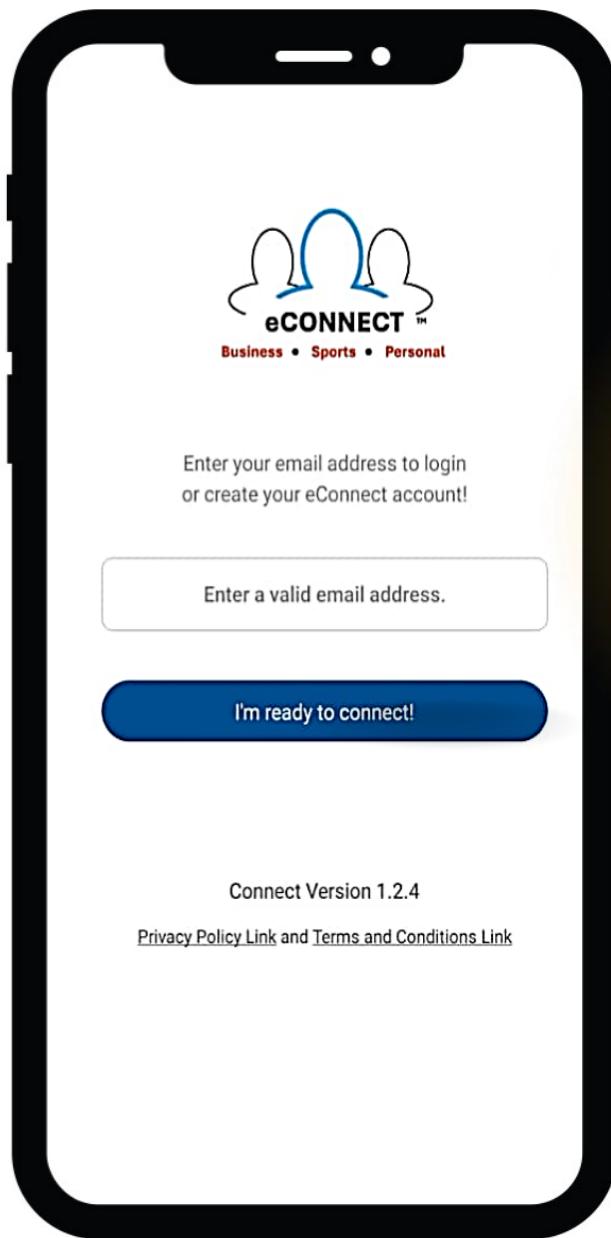
Open the App



# Creating an Account

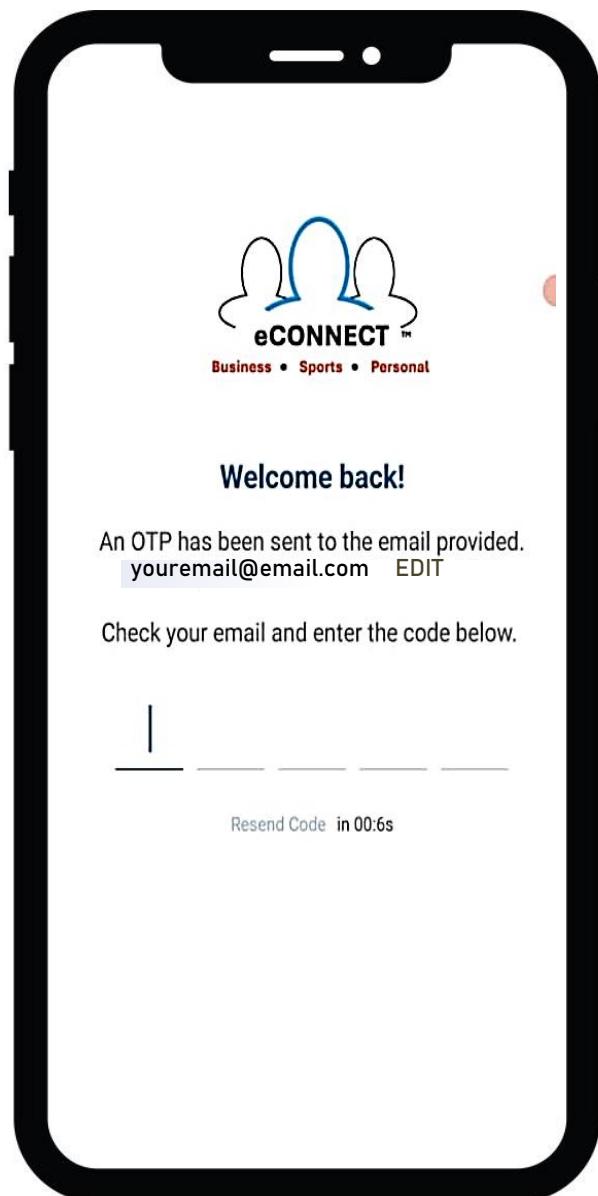


Sign up



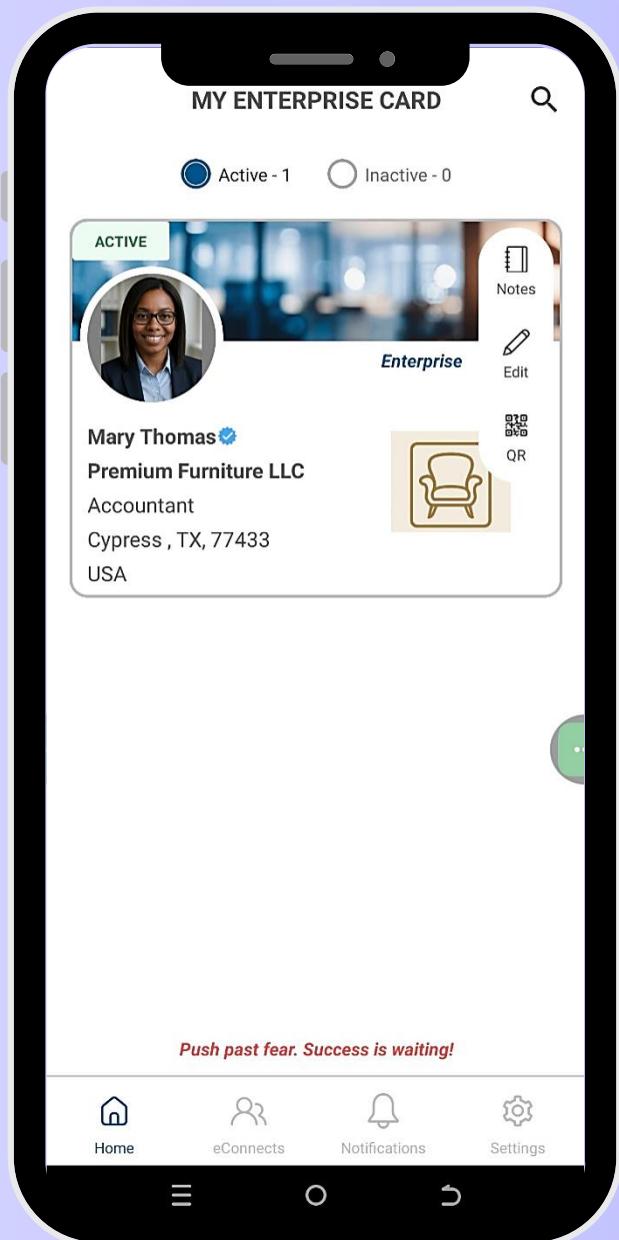
**Fill in your email address.  
(Must match the one registered on the Enterprise Cards Portal as a Card Holder)**

## Email confirmation



Enter the OTP to  
verify your email  
address.

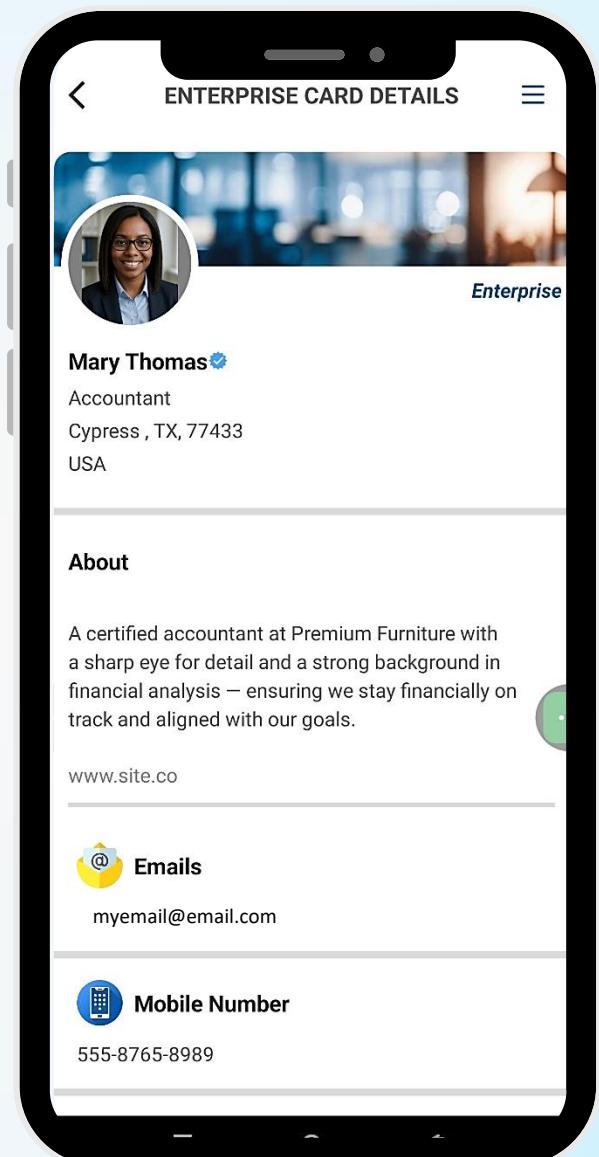
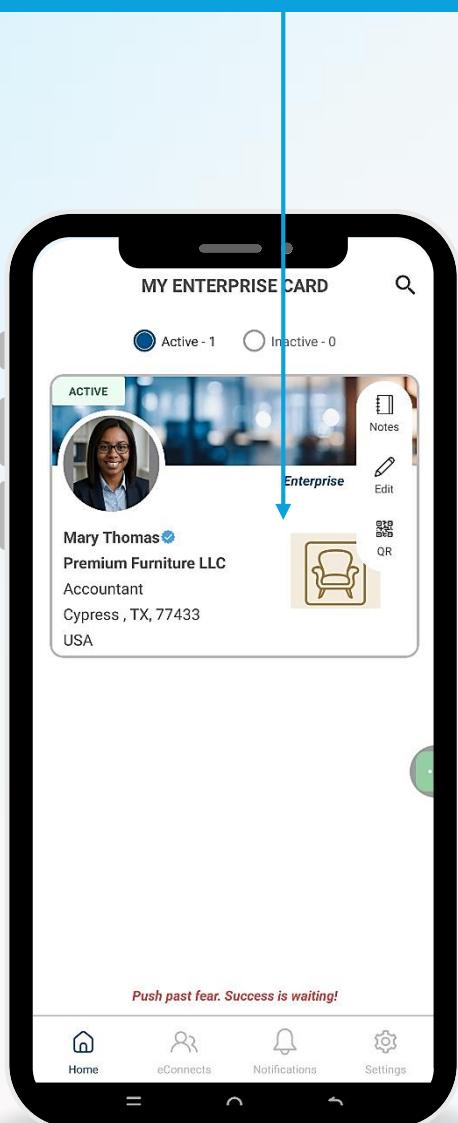
You now have access to  
your Enterprise digital  
card!



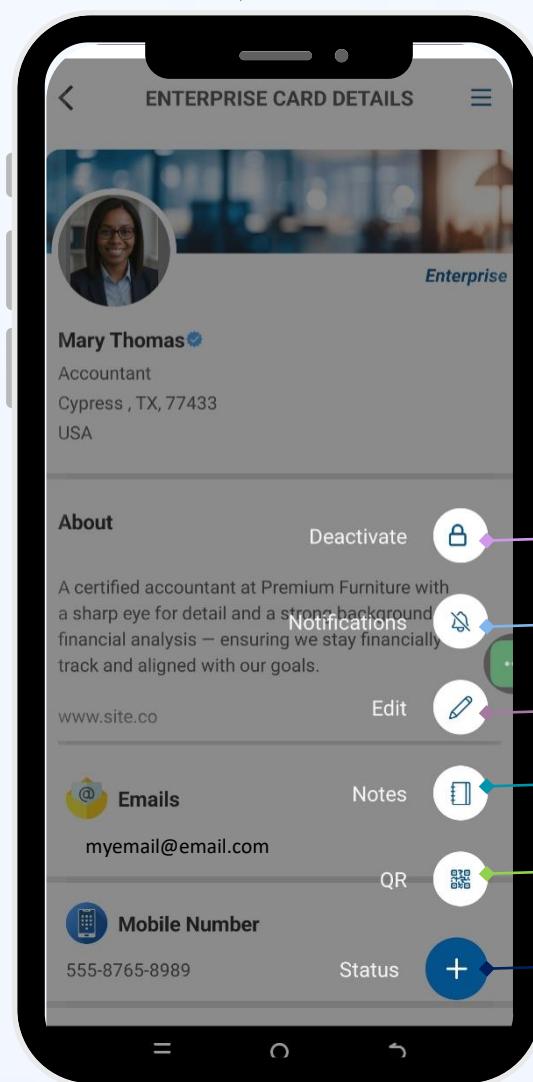
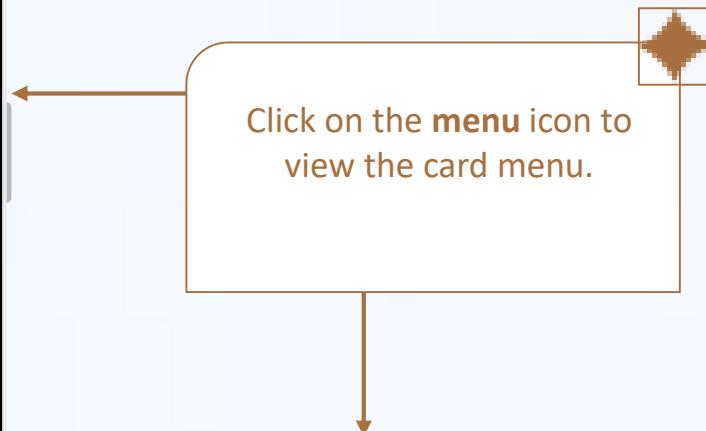
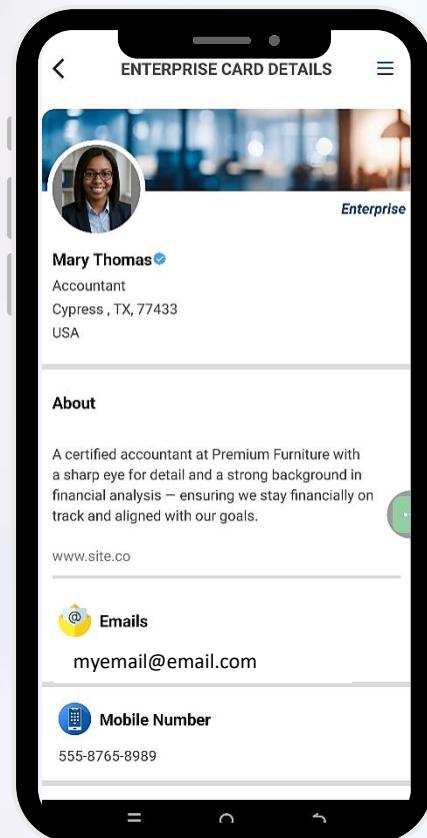
# Card Details View



Click on the Card to view your details



## Card Details Menu



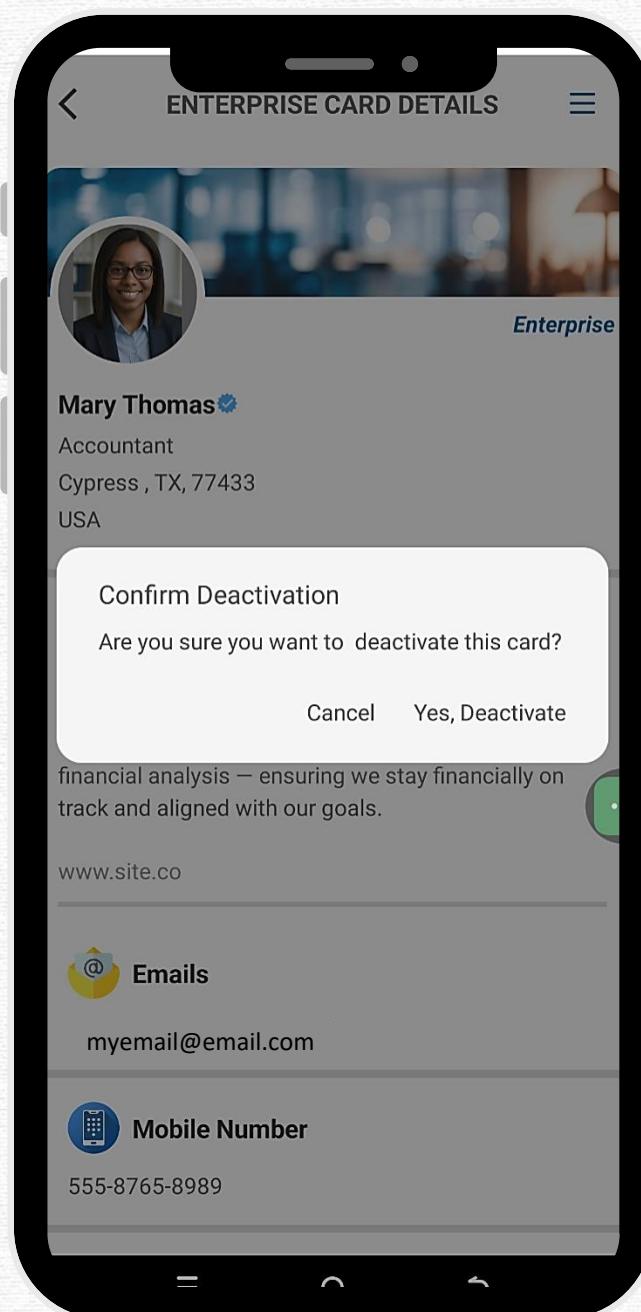
1

### **Card Deactivation:**

To deactivate a card, follow these steps:

- Click on the 'Deactivate' icon.
- When prompted, select 'Yes, Deactivate' to confirm.

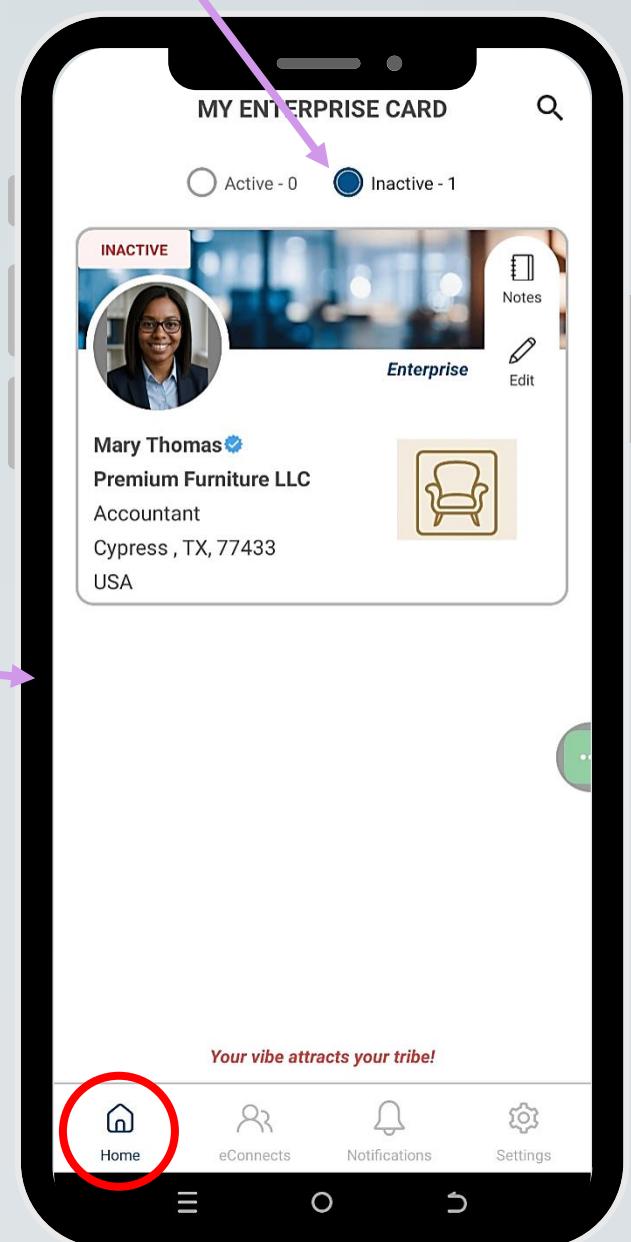
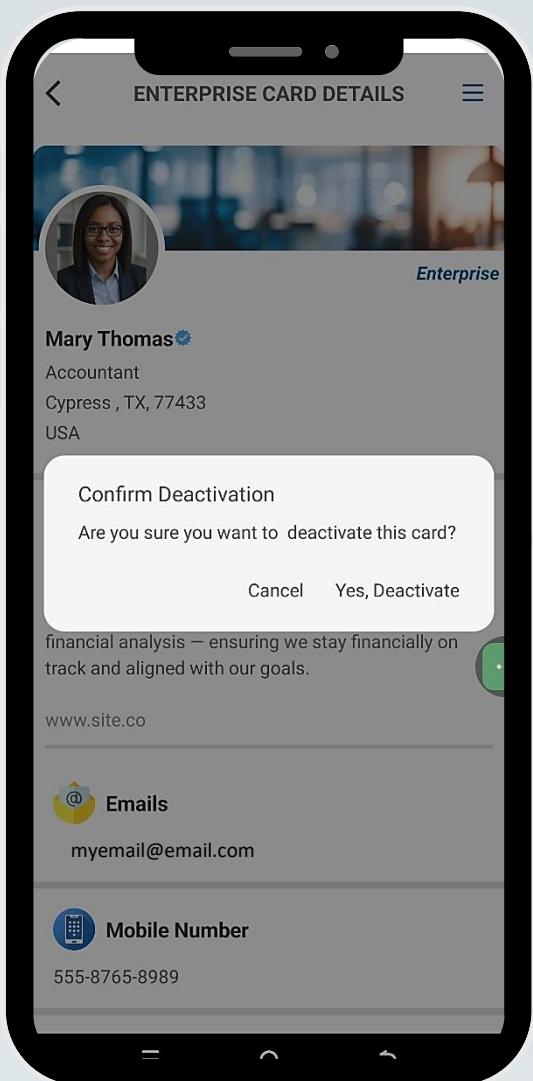
**Note:** All deactivated cards will be moved to the **Inactive Cards** tab until reactivated.



## Inactive Cards

Inactive cards are any cards that have expired or marked deactivate by the card holder or Enterprise Manager.

To view inactive cards, click on the **Home** icon and select the **Inactive** radio button



## How to Reactivate a Card

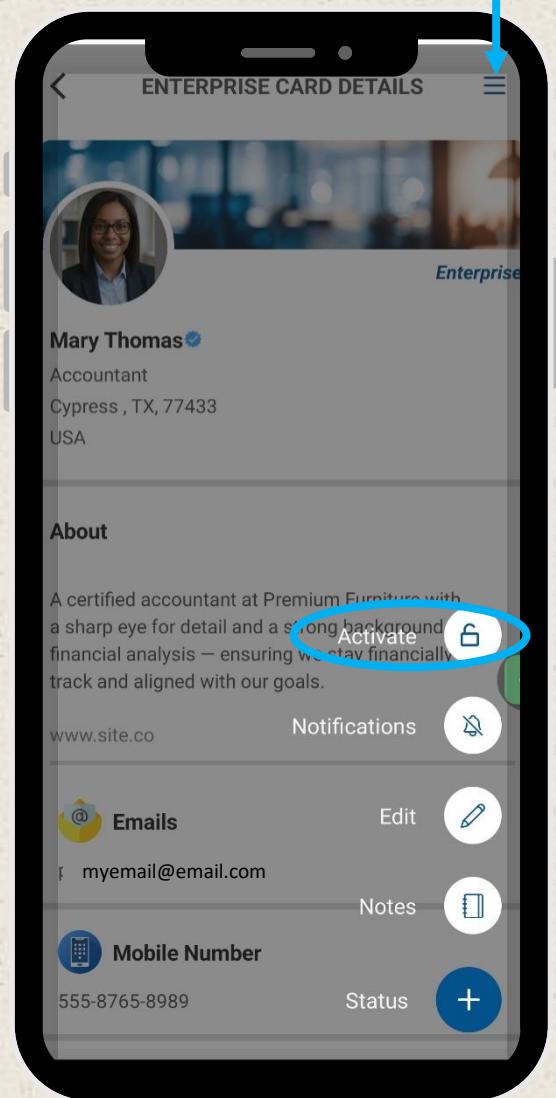
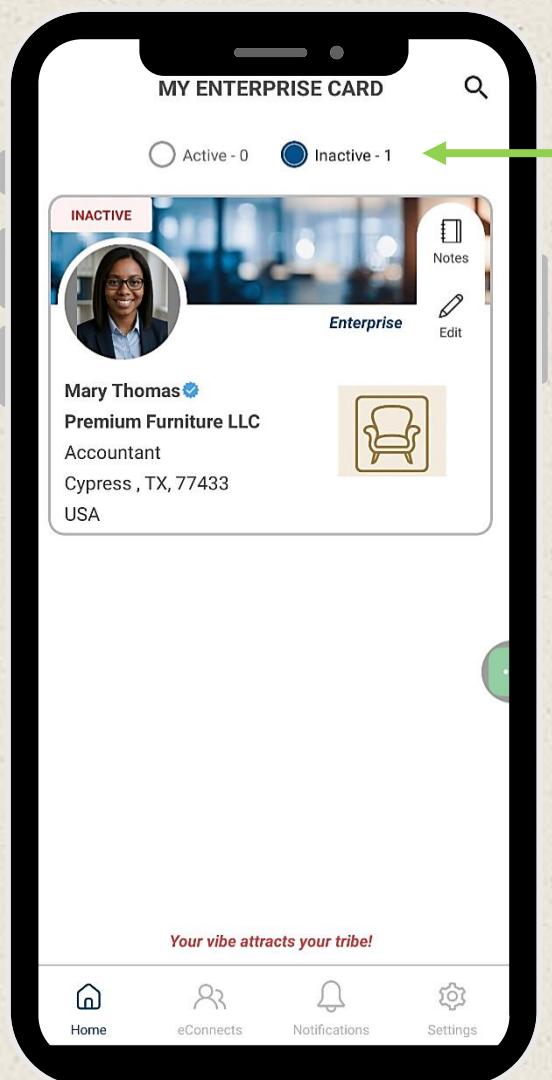
If a card still has time available, it can be reactivated by following the steps below:

1

Navigate to the '**Inactive**' tab on the **Home** page and click on the card you wish to activate

2

Click on the '**Menu**' icon, and select the '**Activate**' option



## How to Reactivate a card

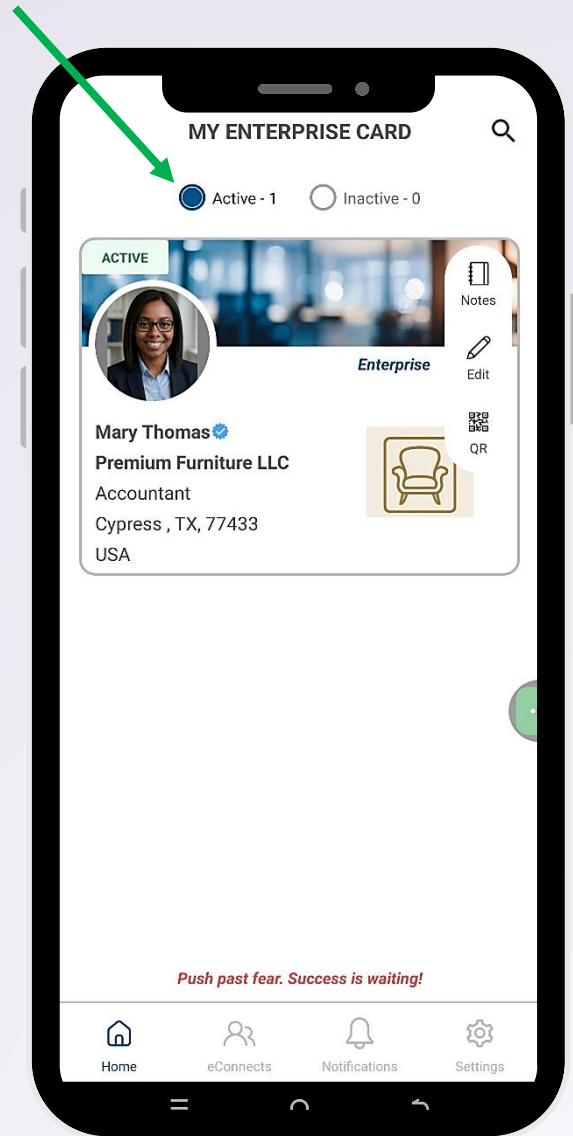
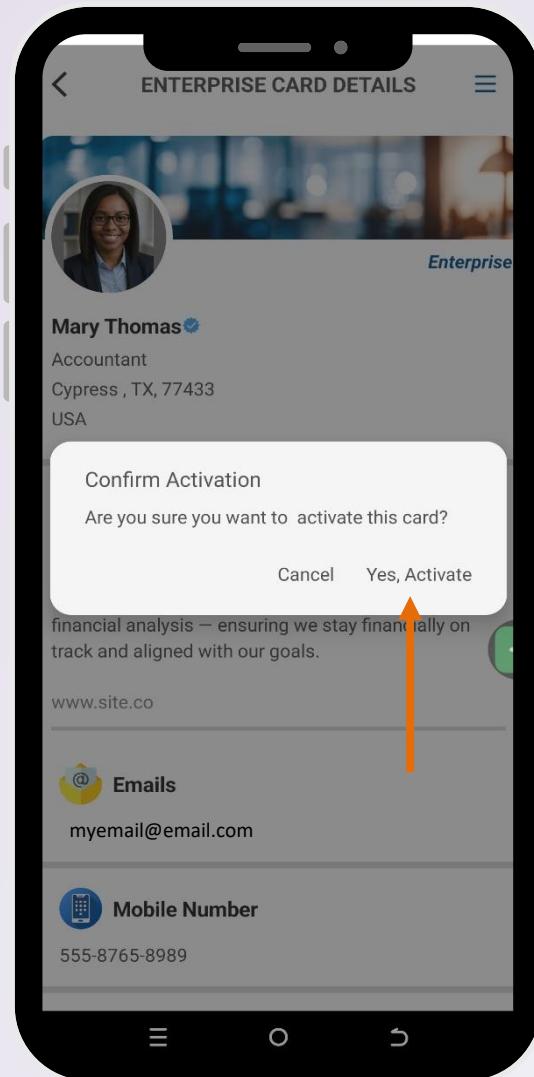
If a card still has time available, it can be reactivated by following the steps below:

3

Click the 'Yes, Activate' option

4

Select the 'Active' button to view the reactivated card



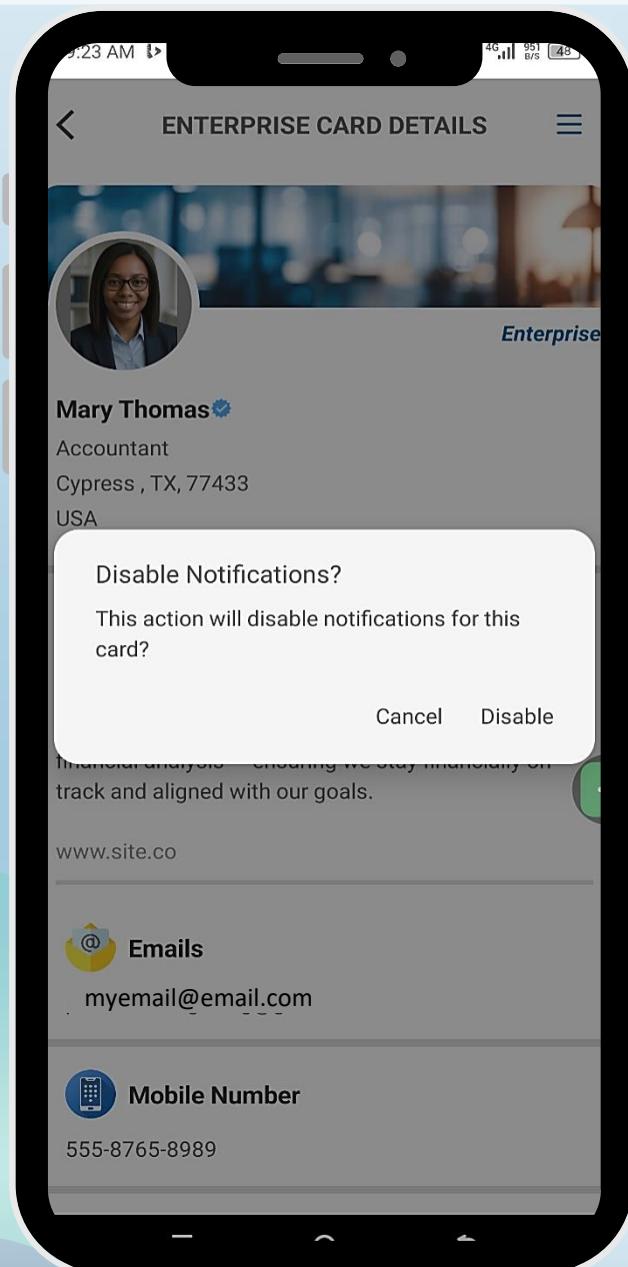
2

### **Updates Notification:**

The notification feature allows users to enable or disable alerts when their connections make updates.

#### **To manage notifications:**

Click on the 'Notification' icon to enable or disable update notifications for a particular eConnect.



3

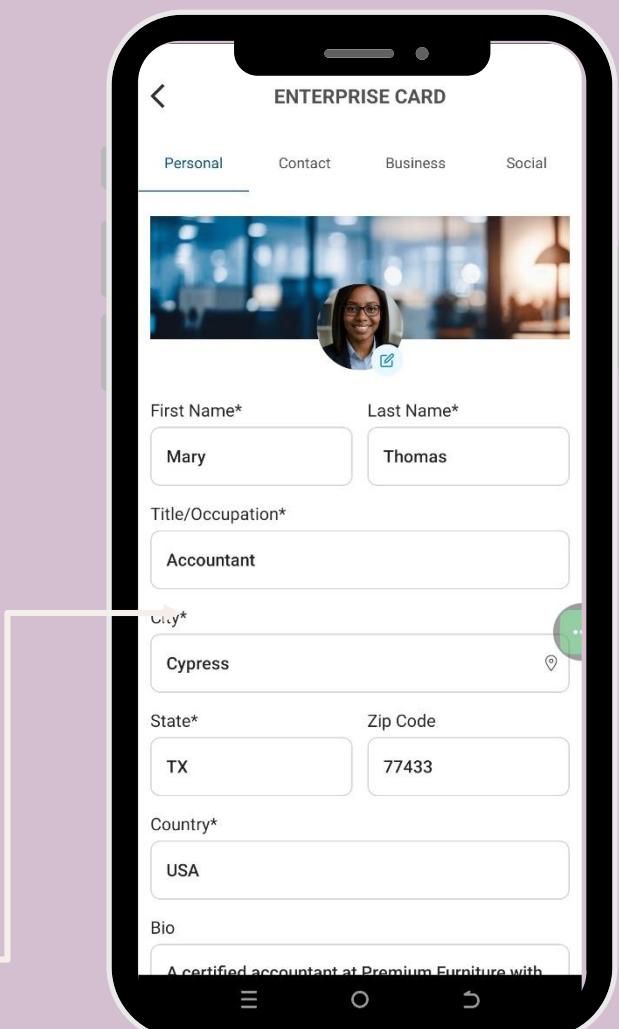
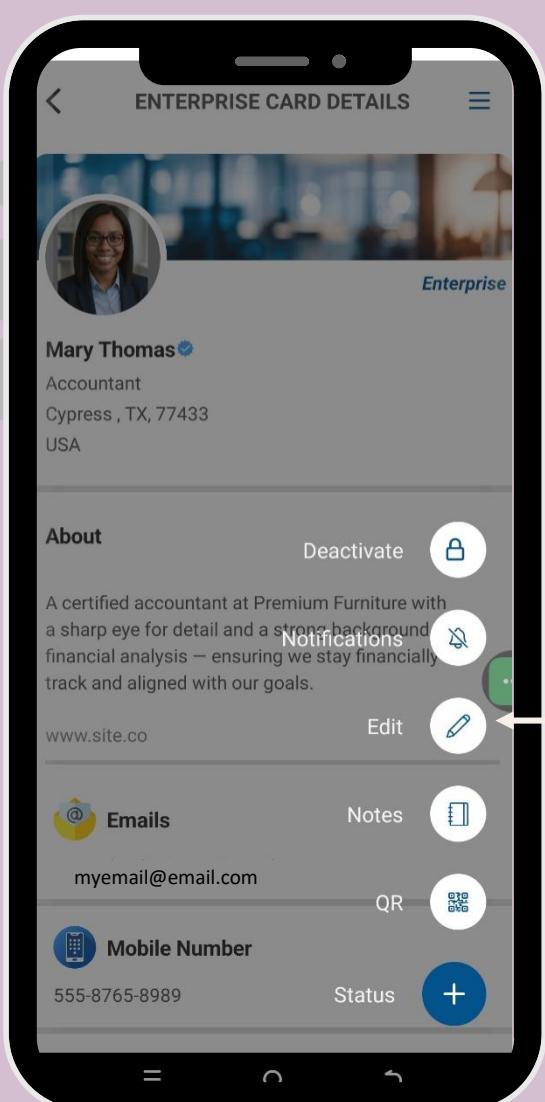
**Edit:**

The **Edit** function allows you to customize or update your eConnect Card, ensuring your information stays current and accurate.

**To edit a card:**

- Click on the 'Edit' icon.
- Update the card details as needed.

**Note:** Only Card holders with 'Write' permission can edit their personal information. Others can only update the profile picture.



4

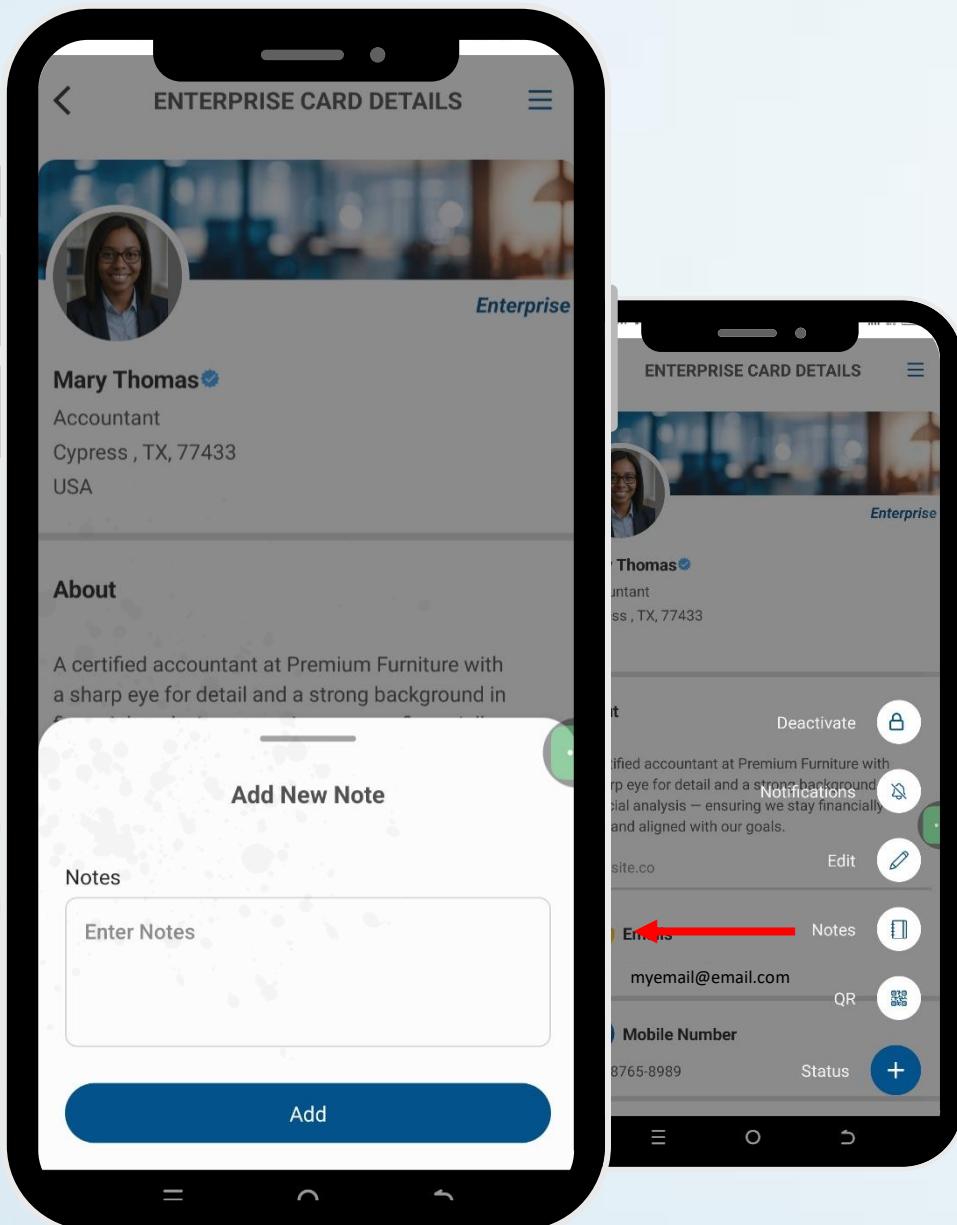
### Notes:

The **Notes** feature functions as a digital notepad, allowing users to record and save meaningful events, important details, or personal reminders.

#### To add a new note:

- Click on the '**Notes**' icon.
- Enter your text.
- Click the '**Add**' button to save the note.

The date and time is automatically captured when a note is saved.



5

### **QR Code Sharing:**

The **QR Code** feature allows you to connect and share your contact details effortlessly.

**You can share your QR Code using one of the following methods:**

1

#### **Share QR code by scanning**

This method allows others to instantly access your contact details by scanning your QR code

2

#### **Share QR code as a link**

You can share your QR code as a clickable link, allowing others to access your contact details easily.

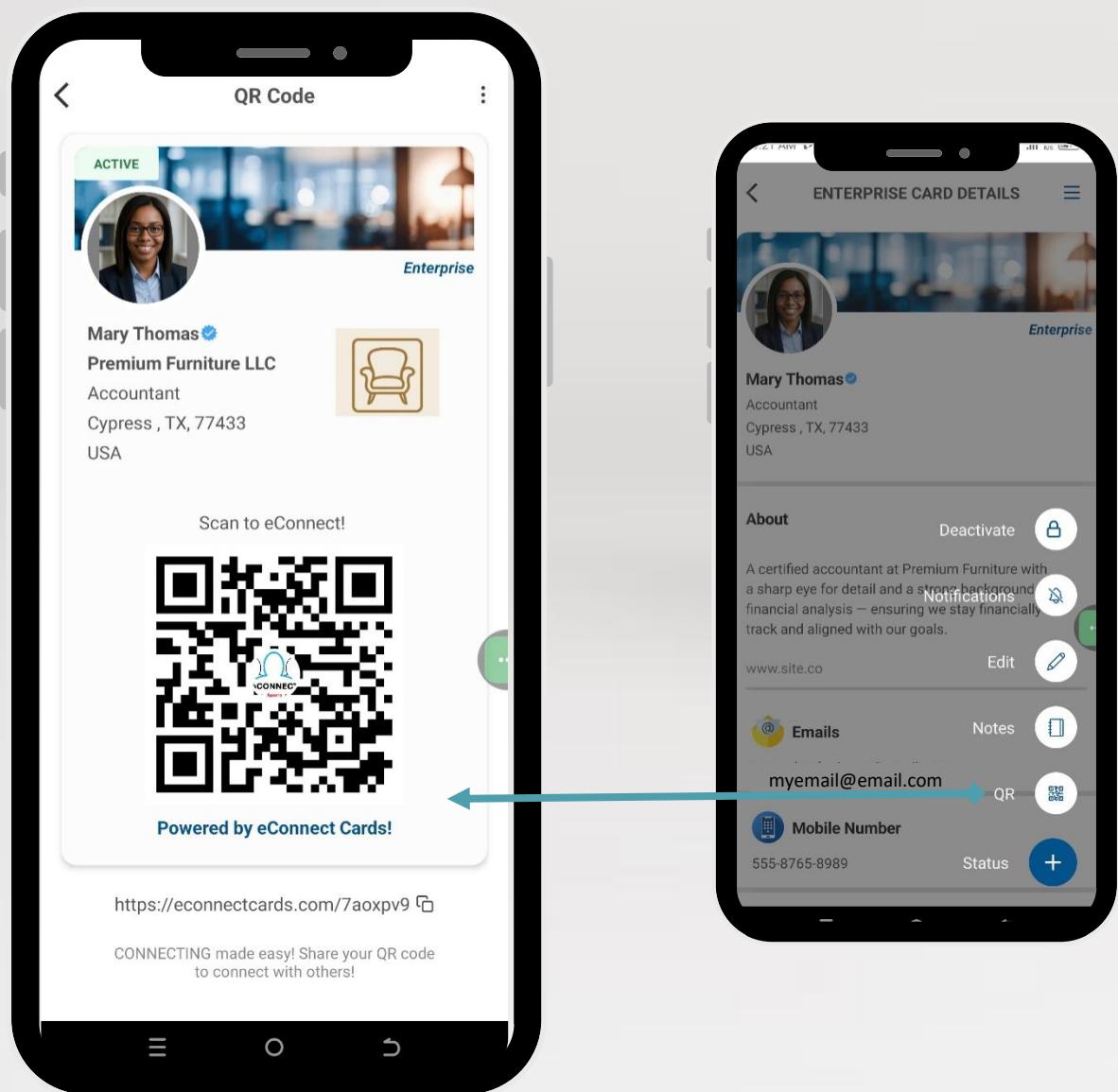
3

#### **Share QR Code online**

You can share your QR Code by putting it on social sites, websites, emails, etc.

## 5.1. Share QR Code by Scanning

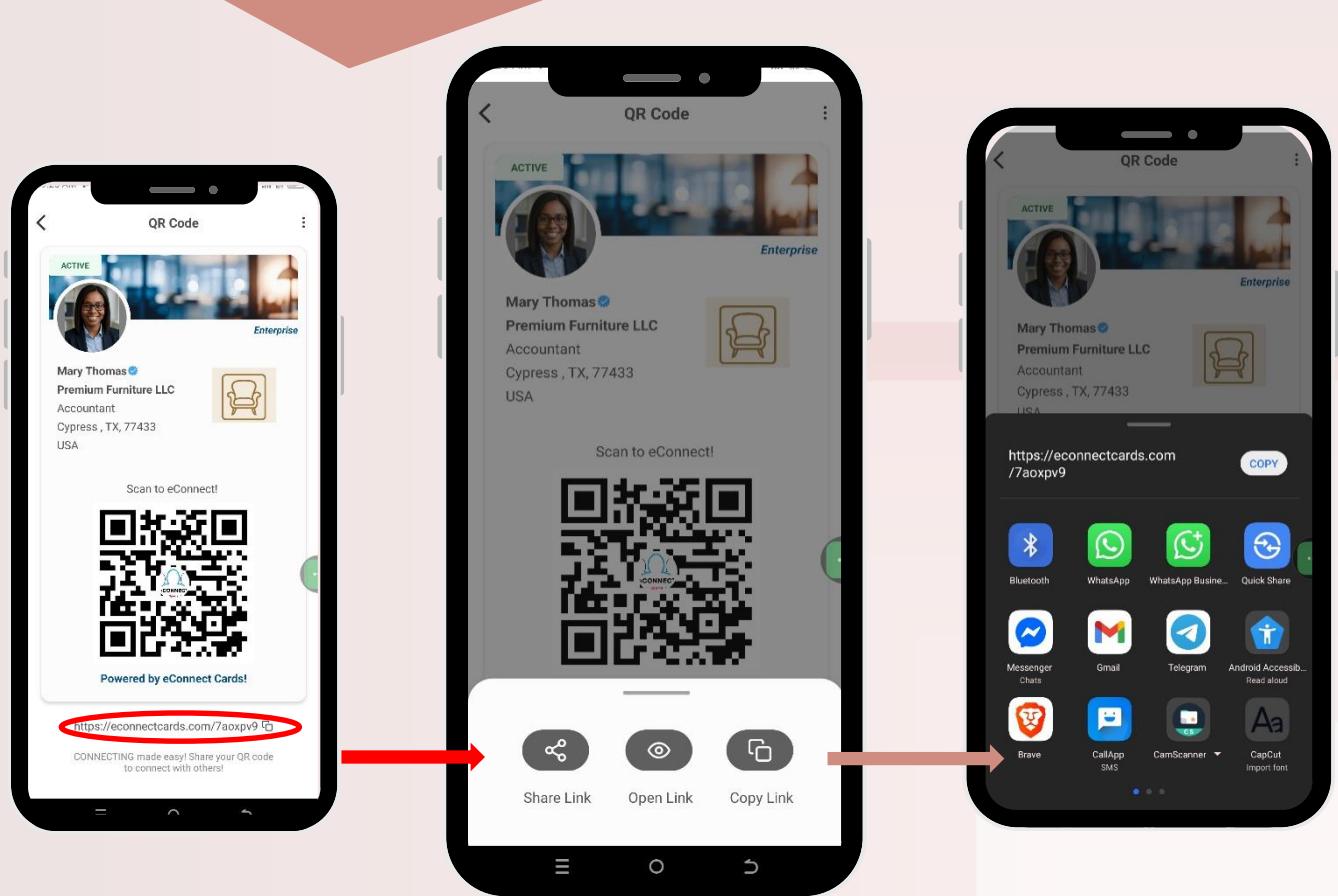
1. Open your QR Code from the app.
2. Ask the recipient to scan the QR code using their smartphone camera or a QR code scanner.
3. Once scanned, your contact details will be displayed and can be saved immediately.



## 5.2. Sharing your QR link

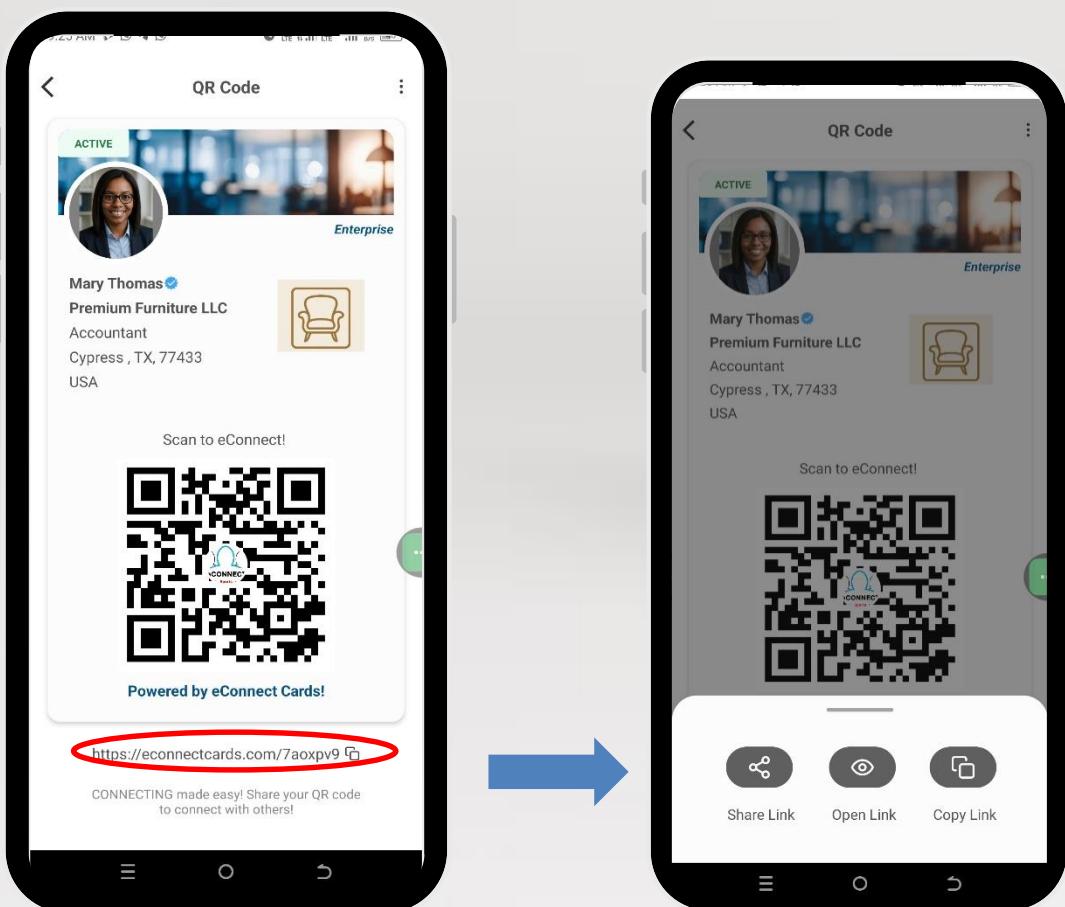
1. Open your QR Code in the app.
2. Click the QR link below the QR Code image
3. Select the 'Share as Link' option.
4. Copy the generated link and share it via email, messaging apps, or social media.

When recipients click the link, they will be directed to your digital contact card.



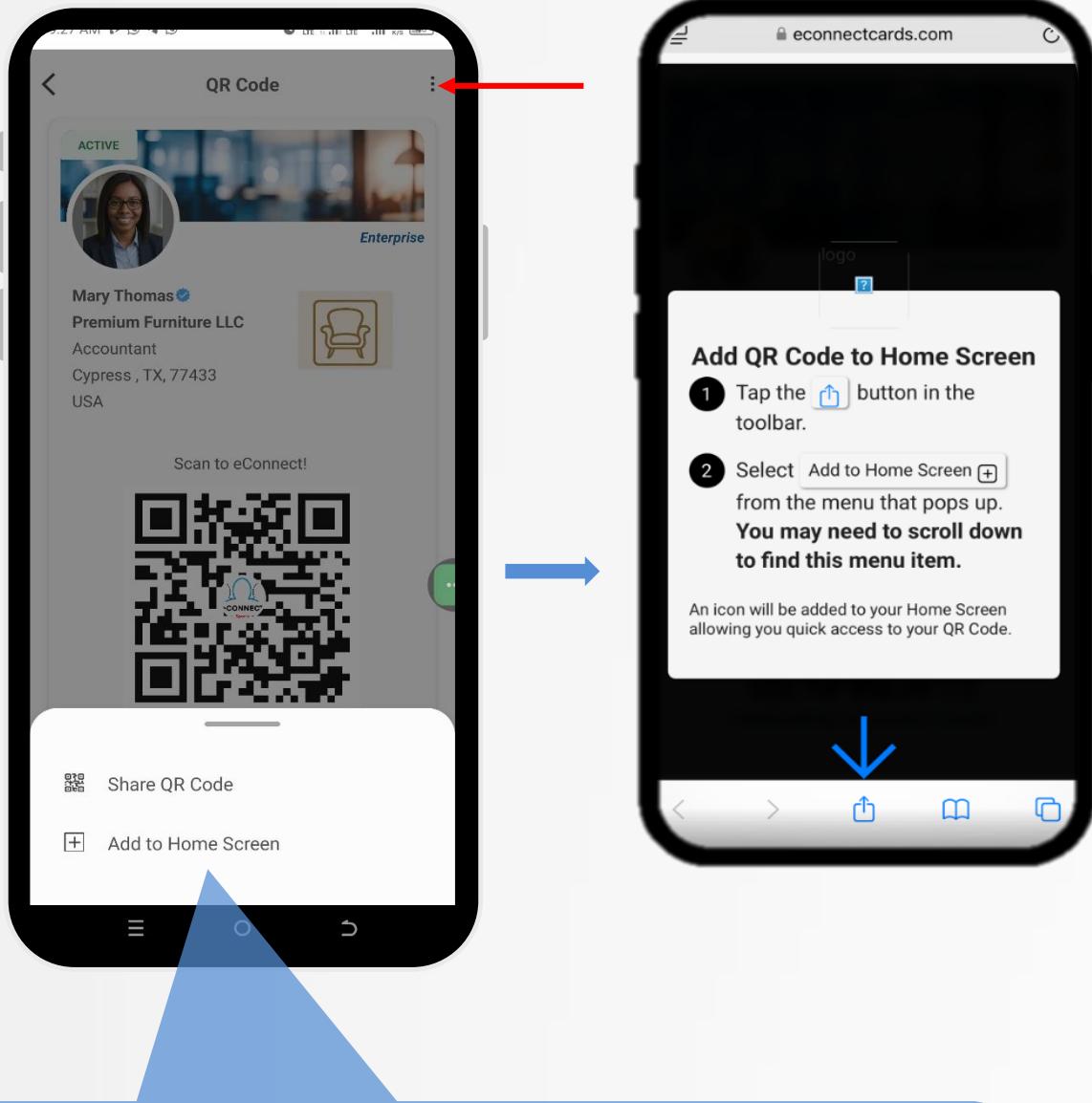
### 5.3. Share QR Code online

1. Open your QR Code from the app.
2. Copy your QR Code Link.
3. Paste the link on any of your online platforms



# Adding QR to Home Screen

You can quickly access and share your QR code by adding it to your device's home screen.



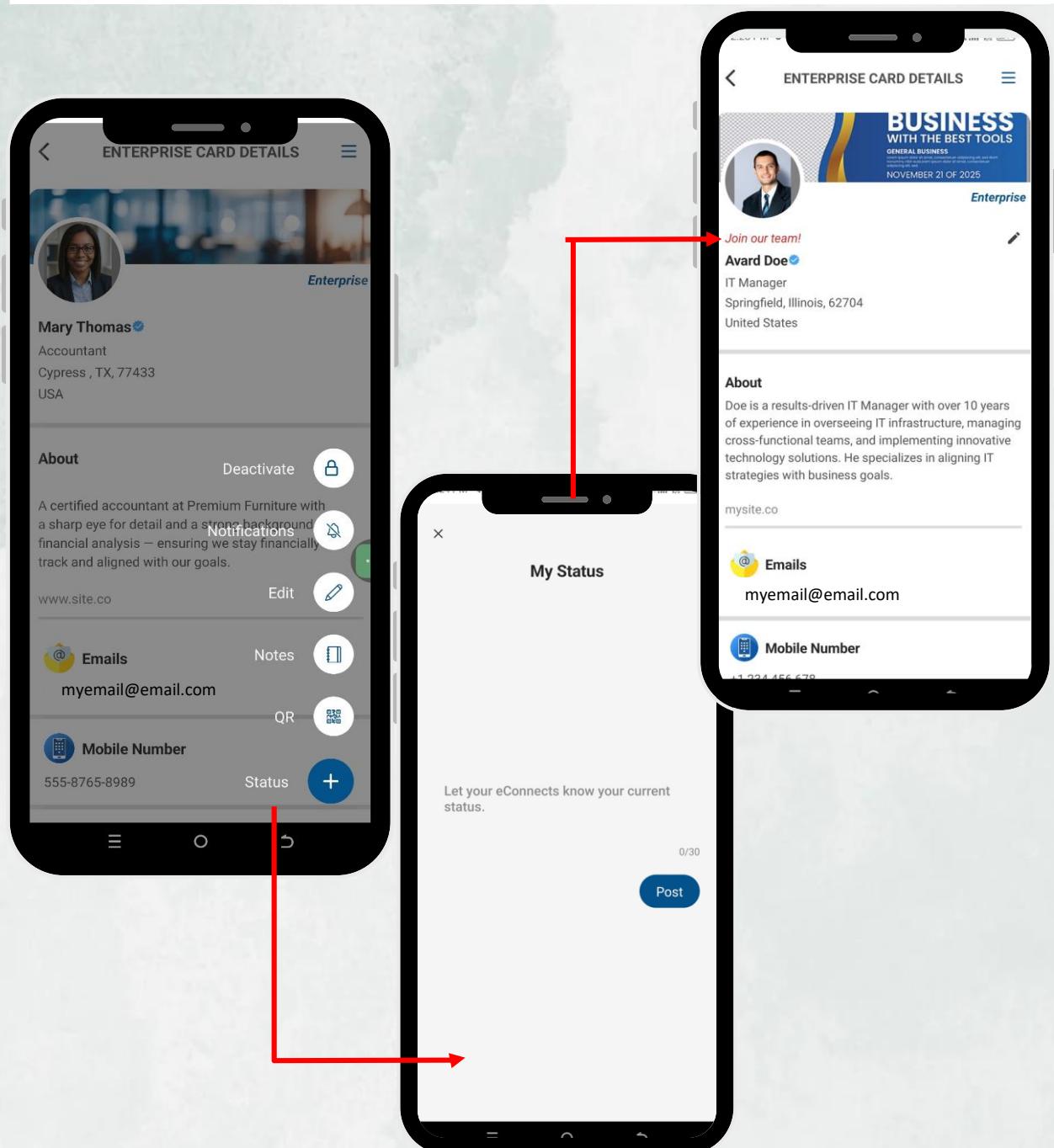
1. Open your **QR Code** in the app
2. Tap the menu icon, shown as three dots.
3. Select the '**Add to Home Screen**' option.
4. Follow the on-screen instructions to complete the setup.



## Status:

This feature allows you to share real-time updates with your eConnects about anything you wish to share with your network. If the notifications are enabled, your eConnects will receive real-time notifications of your new status.

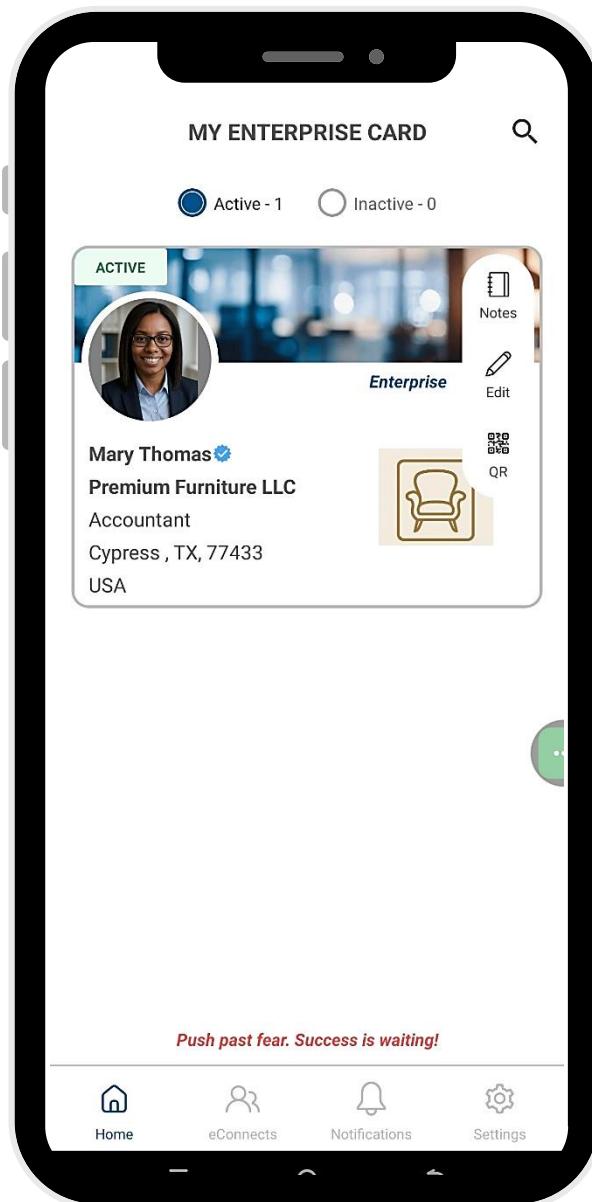
To update your status, click on the '**Status**' icon, update your status and press the '**Post**' Button to submit. After updating your status for the first time, an 'Edit' pencil will be located next to the status message to make quick status updates.



The **"Home"** button returns you to the landing page of the eConnect Cards App, giving you quick access to key features and functionalities.

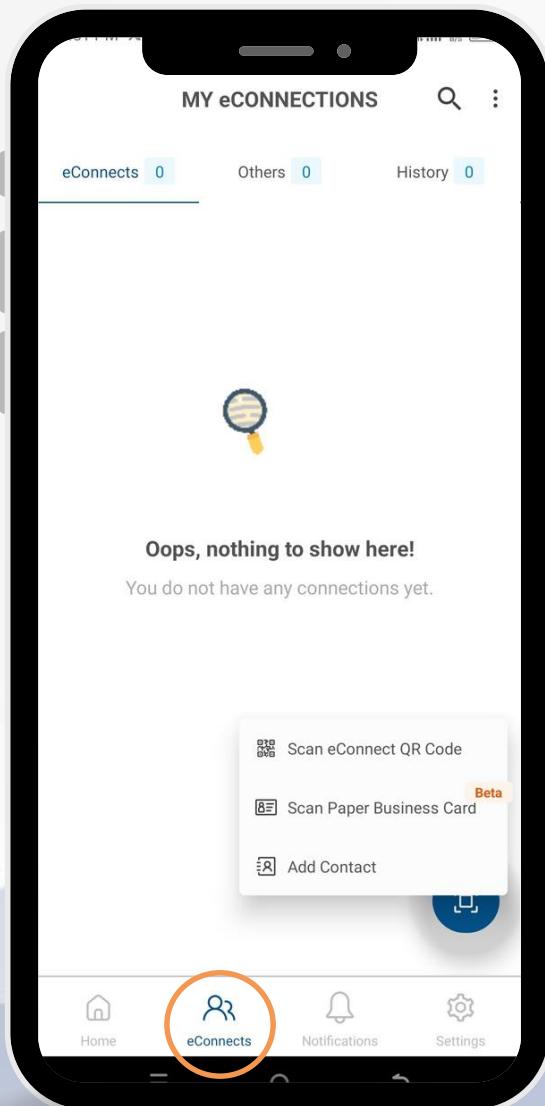
## Other Menu Options:

- Notes:** The **Notes** feature functions as a digital notepad, allowing users to record and save meaningful events, important details, or personal reminders.
- Edit:** This allows you to customize or update your eConnect Card, ensuring your information stays current and accurate.
- QR:** The **QR Code** feature allows you to connect and share your contact details effortlessly.



The eConnects tab is a directory of all of your contacts saved on the app. This makes it easy to access and manage your contacts all-in-one place. This directory includes:

- ✓ Contacts who have eConnected with you on the eConnect App
- ✓ Contacts that have exchanged their information with the card holder
- ✓ Contacts whose business cards have been scanned in by the card holder.
- ✓ Contacts that have been manually entered.



# Managing Your eConnections

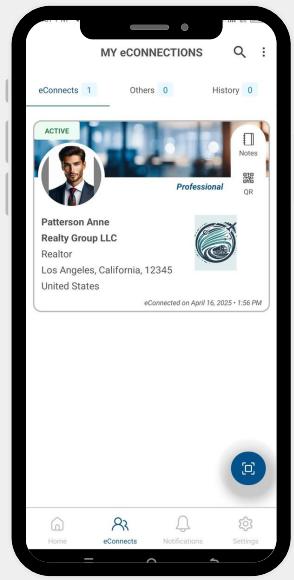
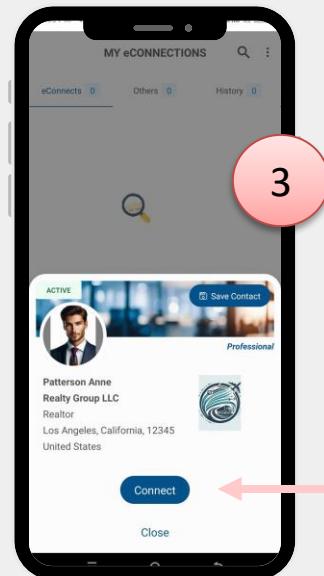
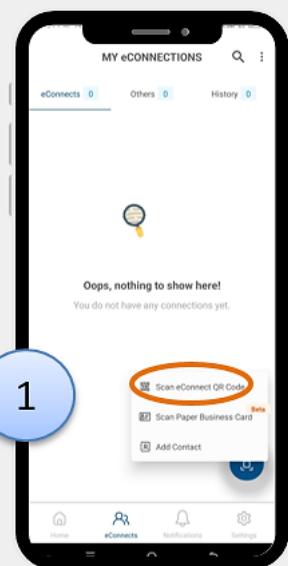


There are 4 ways to connect with others to expand your network. Let's walk through eConnecting with others via the eConnect App functionality.

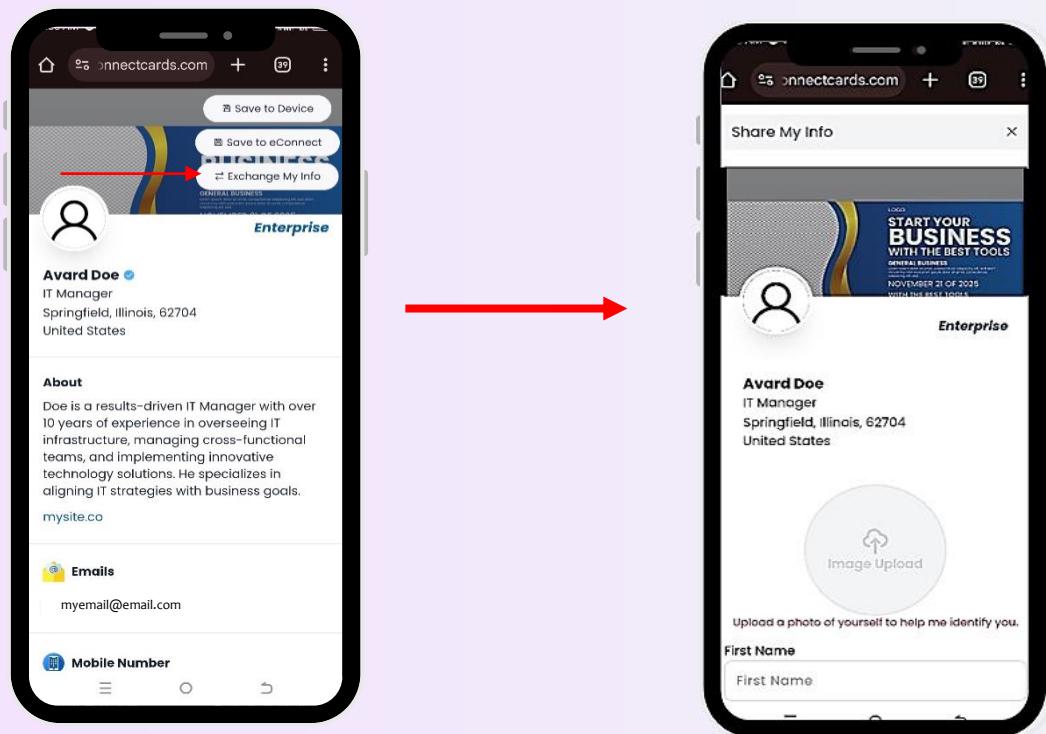
## **eConnecting with Contacts:**

To connect with other eConnect Cards App users, follow these steps:

- ❖ Tap the "Scan eConnect QR Code" option.
- ❖ Scan the QR code of the person you want to connect with.
- ❖ Click the "Connect" button to complete the connection.

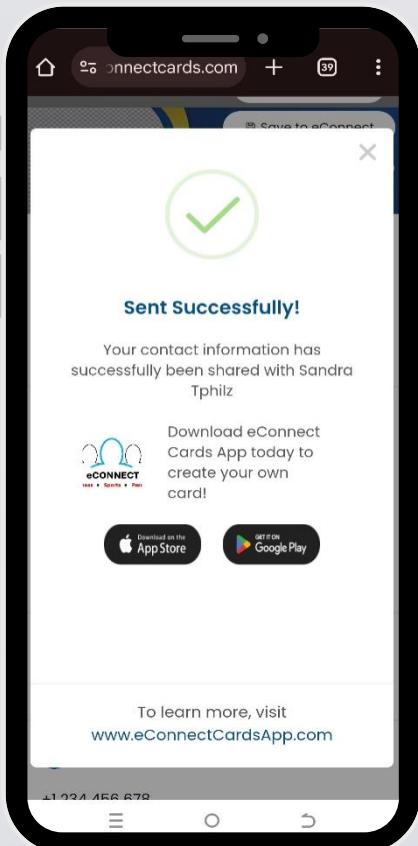


Use the **Exchange My Info** Option: The exchange my info option on the web view of your eConnect Card allows other people to share their contact information directly with you which is stored on the eConnect Cards App.

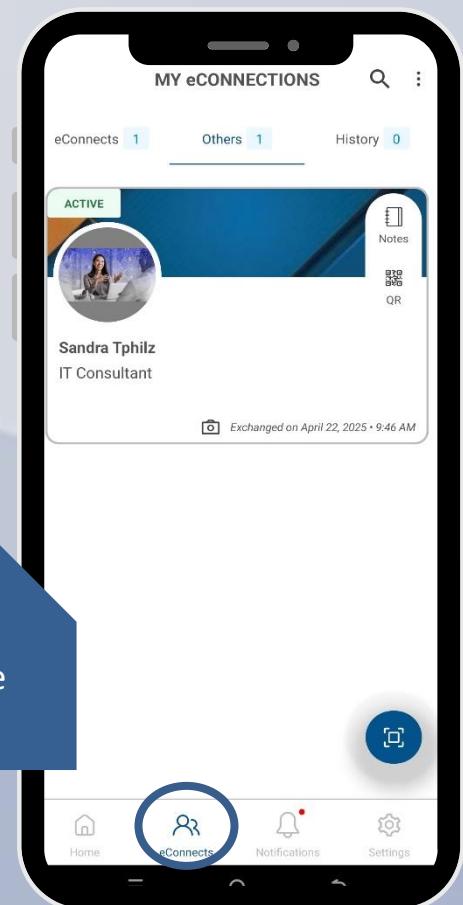


1  
 Open the QR link  
 on the web  
 browser and tap  
 the '**Share my Info**'  
 button

Fill the details  
 and click the  
 '**Submit**' button  
 to save  
 information



You have  
successfully  
shared your  
information!



Your new connections  
would be saved in the  
eConnect section of the  
eConnect Cards App

# Scan Paper Business Card

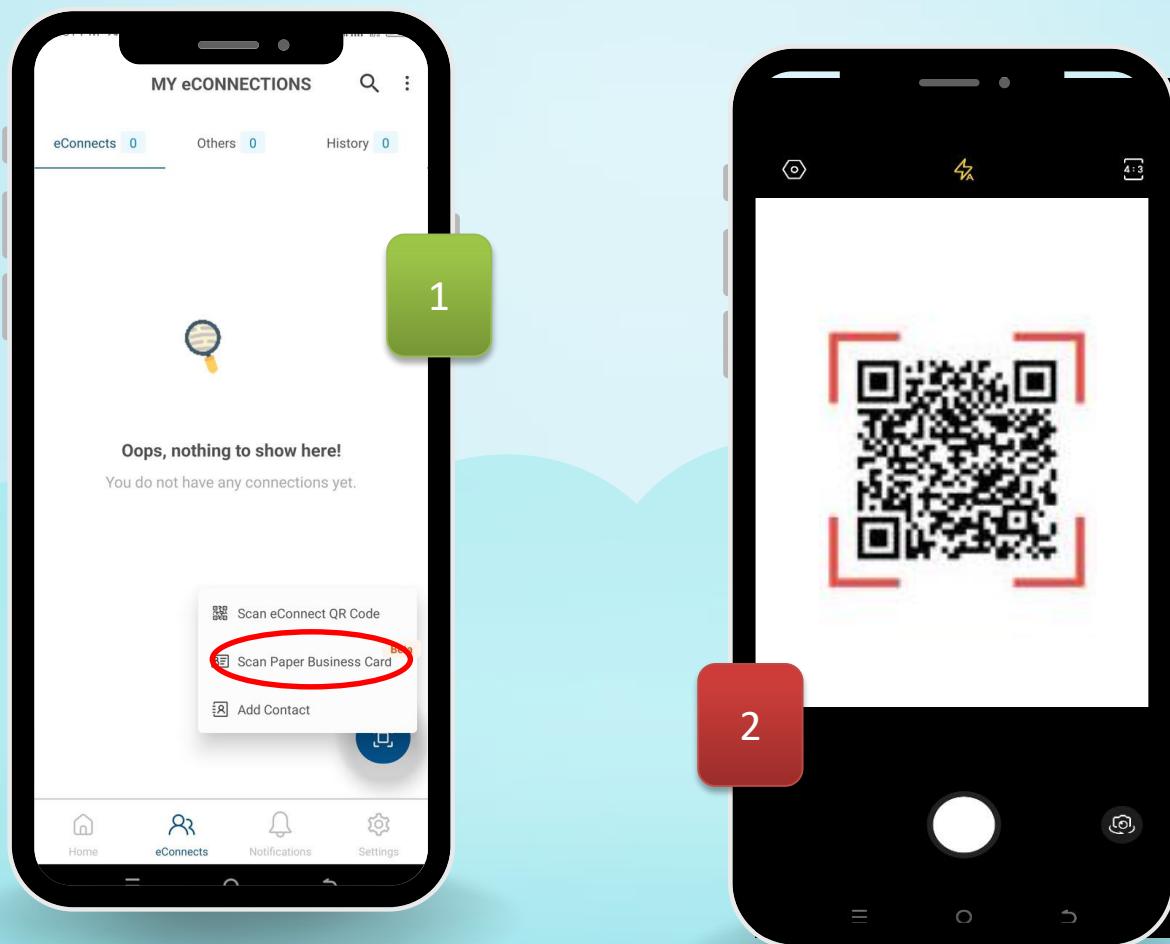
## Scanning Paper Business Card:

This feature enables you to easily scan a paper business card and extract its details for seamless connection..

To scan a paper business card:

- Tap the "Scan Paper Card" icon.
- Align the card within the scanner frame and capture the image.
- The app will extract the details automatically for you to save or connect.

**Note:** Contacts added using the paper scan method will be listed under the "Others" tab.



# Manually Add Contacts

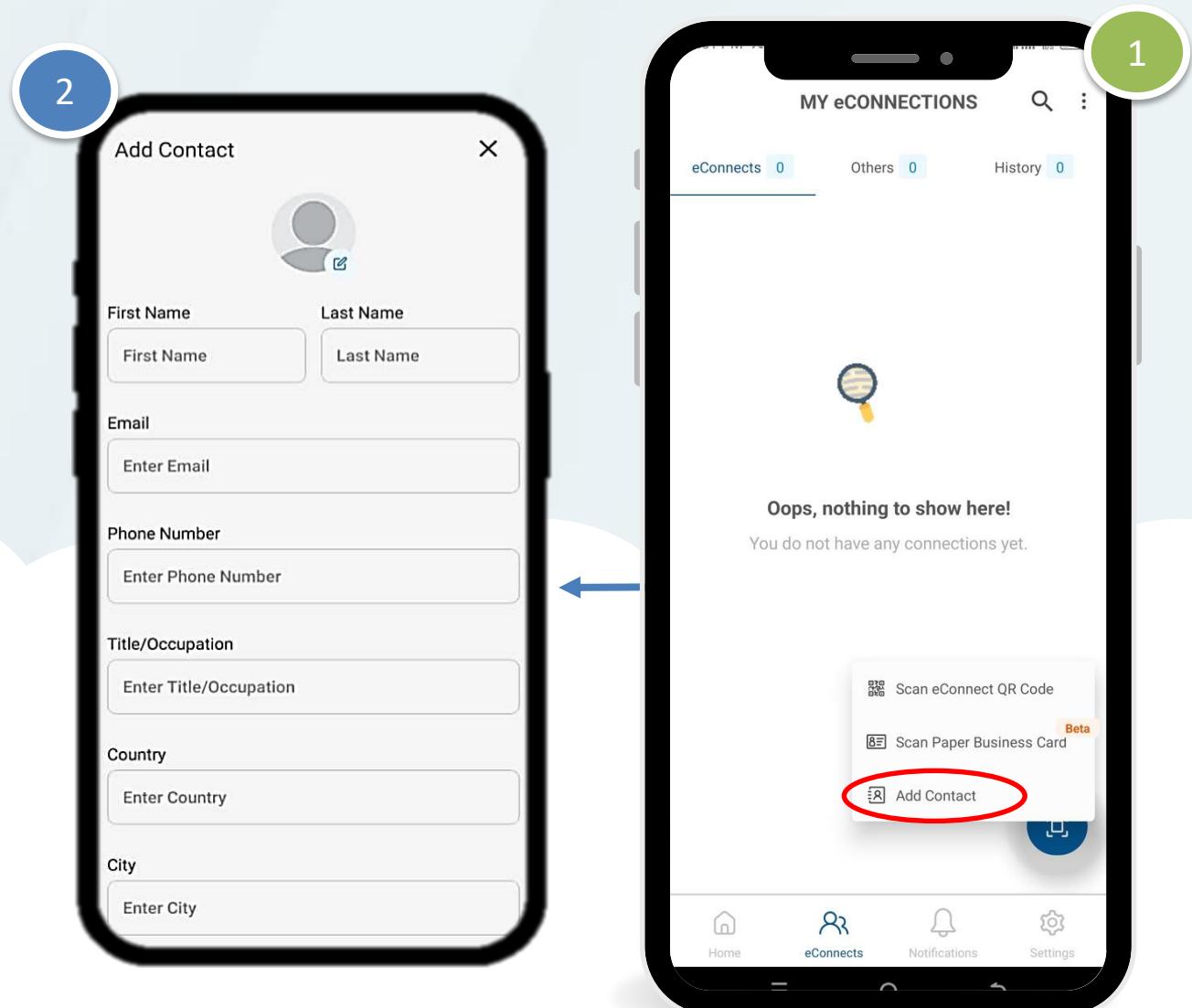
## To manually add a new contact:

This feature enables you to manually add contact details.

To scan a paper business card:

- Click the "Add Contact" button.
- Fill out the contact form with the required details.
- Click "Save" to store the contact in your list.

**Note:** Contacts added using the paper scan method will be listed under the "Others" tab.



# My eConnections Menu

**a. Click to view connection details**

**b. Click on the menu icon on the card details to view menu**

# Menu Options



## Notifications

The **Notifications** button allows you to enable or disable notifications for updates from your connections.



## Notes

The **Notes** feature allows you to add and store important details about your connections for easy reference.



## QR

The **QR Code** feature enables quick and seamless connections by scanning or sharing unique QR codes.

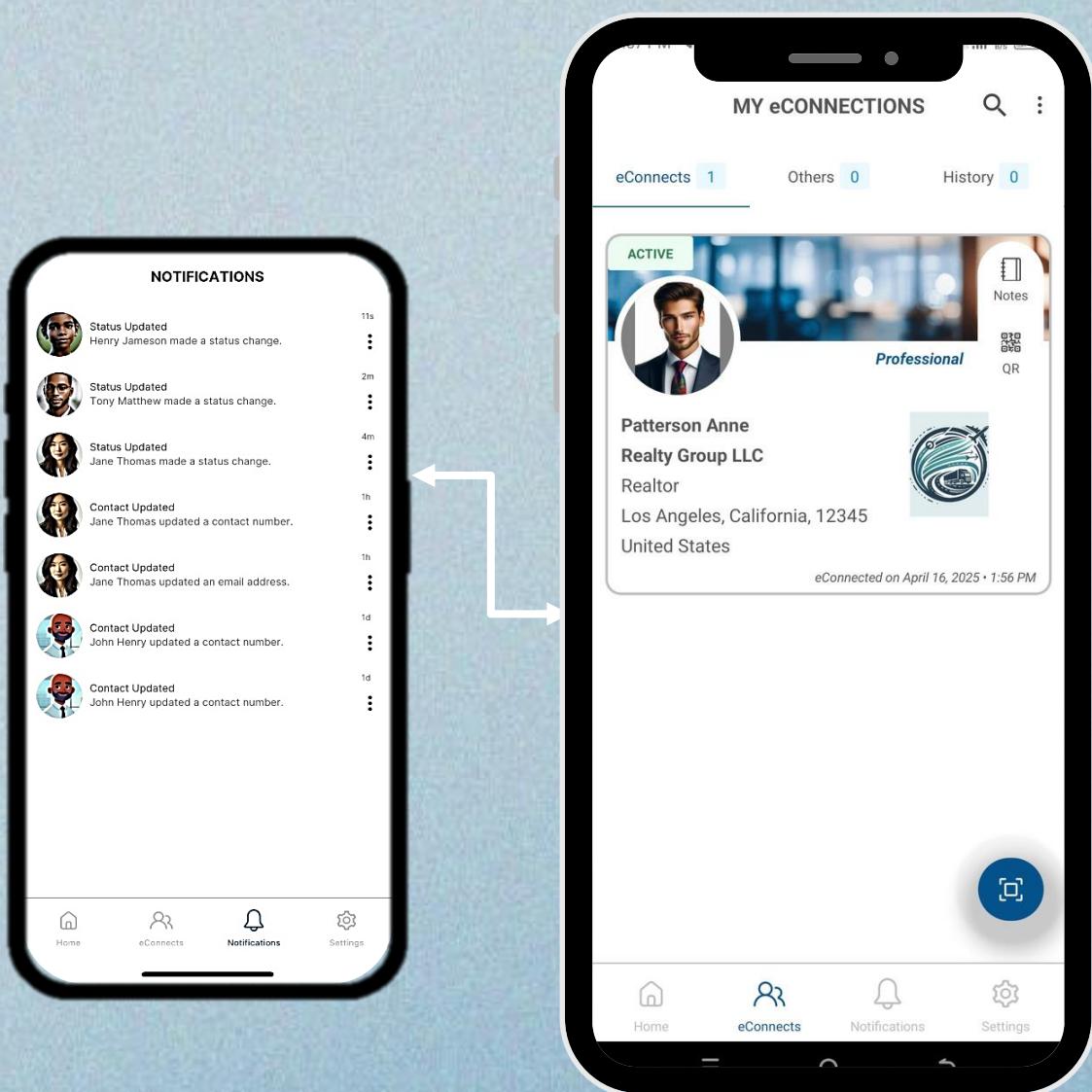


## Remove

The **Remove** button allows you to delete a contact from your connections list.

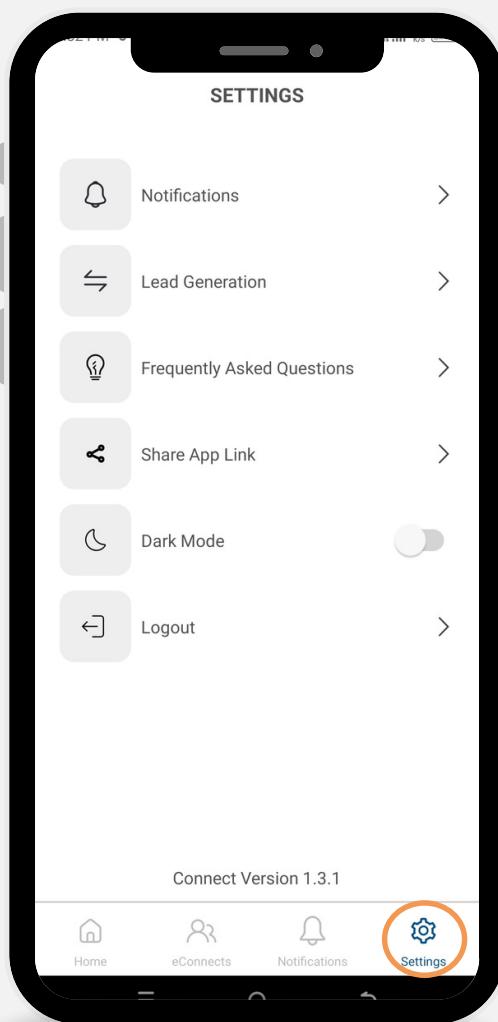
# Notifications

The **Notifications** feature keeps you informed whenever any of your connections update their cards, ensuring you always have the latest information. You have the ability to turn notifications on and off at the card level by clicking on the notifications from the menu to enable or disable alerts.



## Settings

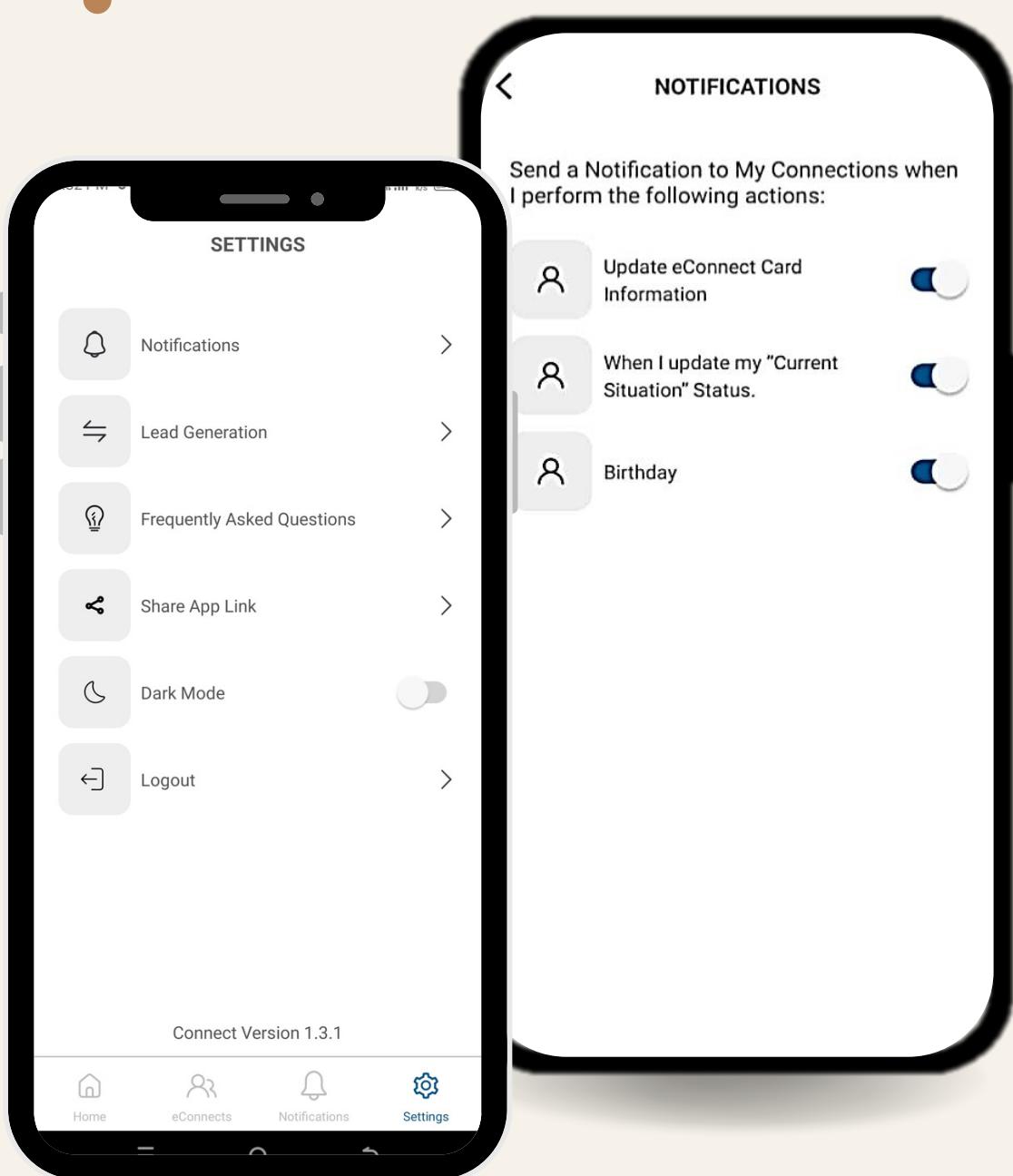
The **Settings** function for enterprise card holders allows you to personalize your experience on the eConnect Cards App based on your preferences such as when to receive notifications or to enable/disable the lead generation options.



## Settings Menu

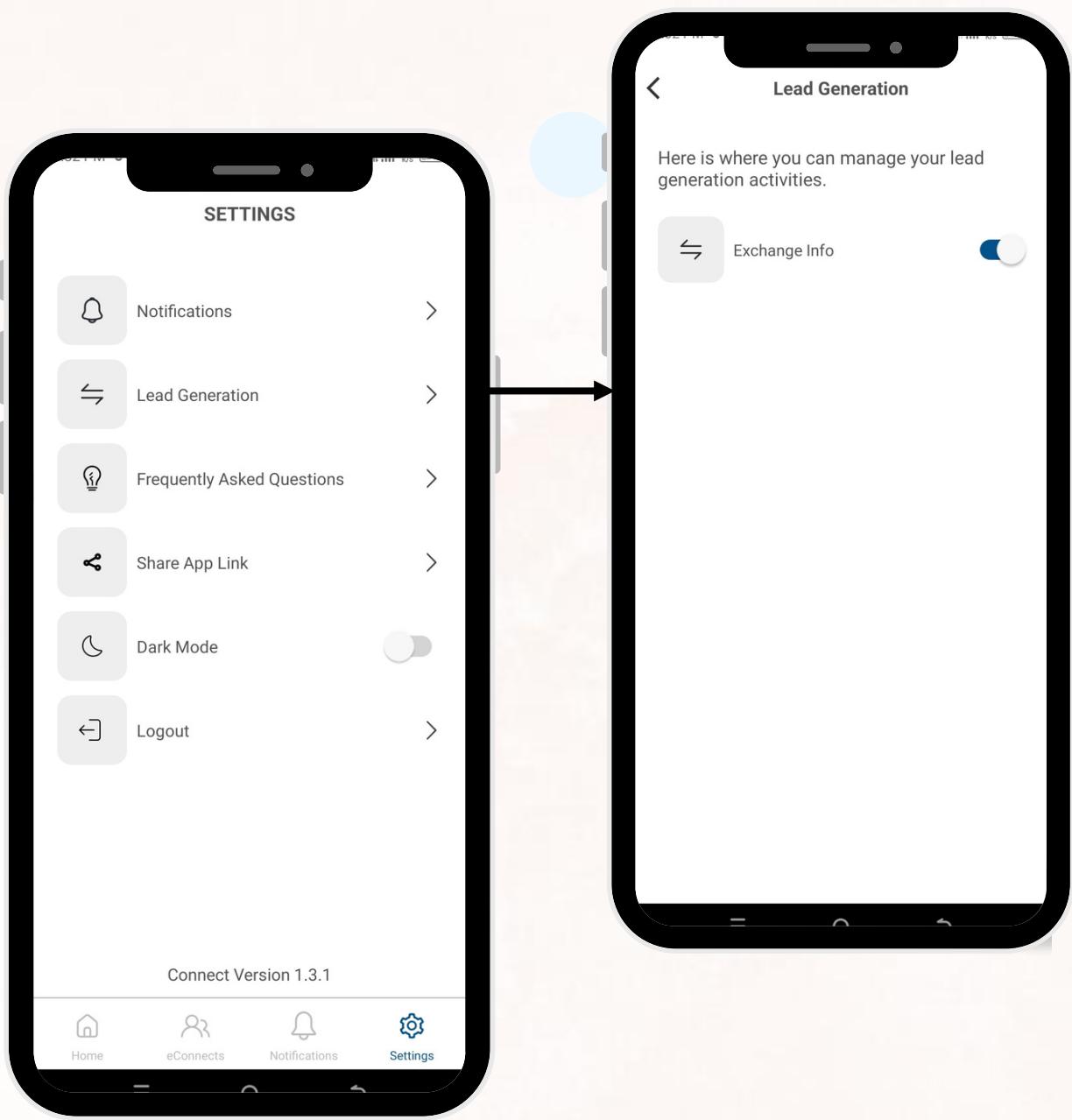
### 1. Notification

Select 'Notification' to set general notification on the eConnect Cards App.



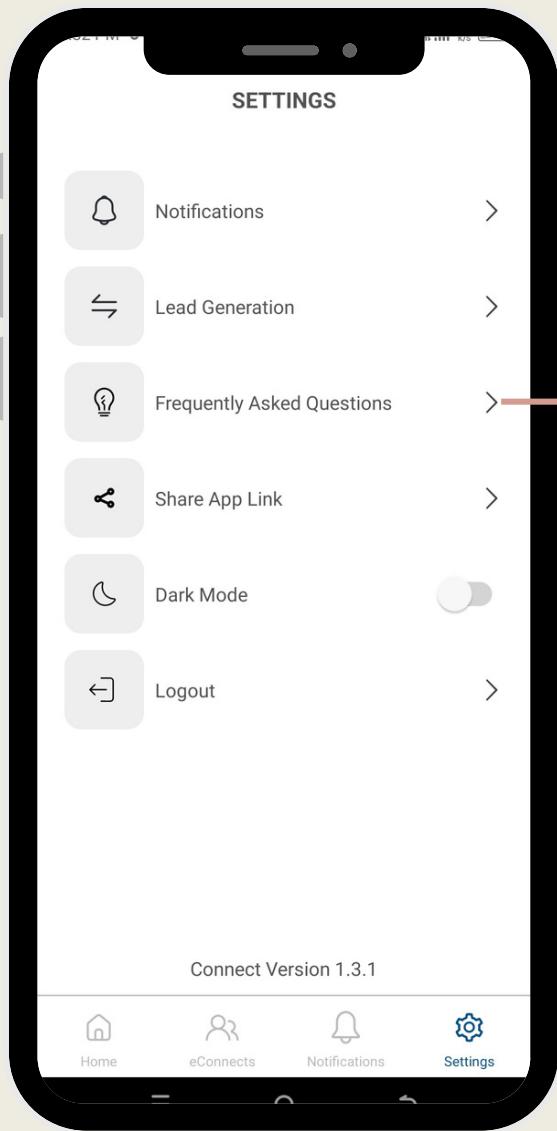
## 2. Lead Generation

Allows manual exchange of info



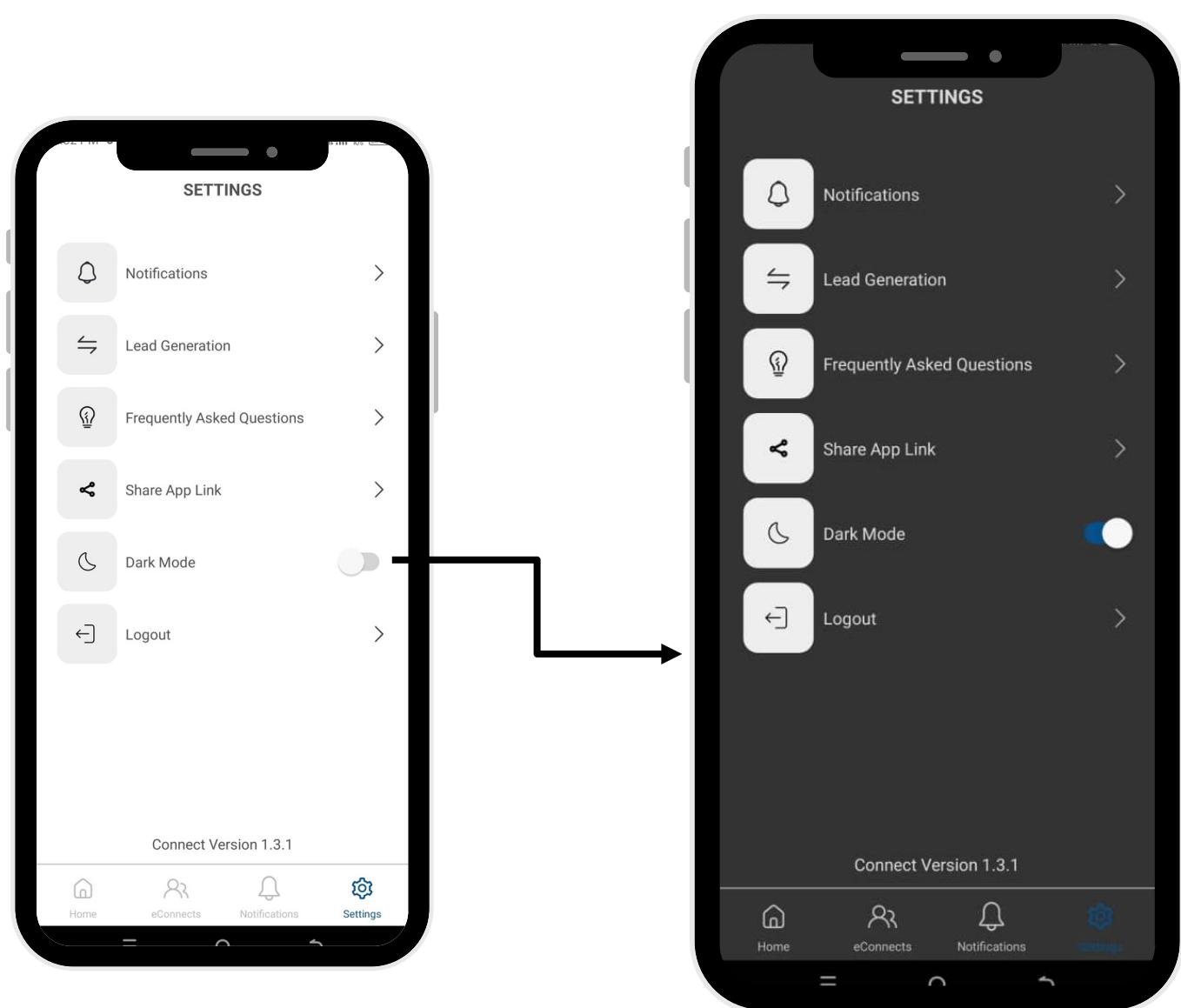
### 3. Frequently Asked Questions

Select "**Frequently Asked Questions**" to access support and find answers to common queries about the eConnect Cards App.



## 5. Change Color Mode

Select '**Dark Mode**' to switch the eConnect Cards App interface to a darker color scheme.

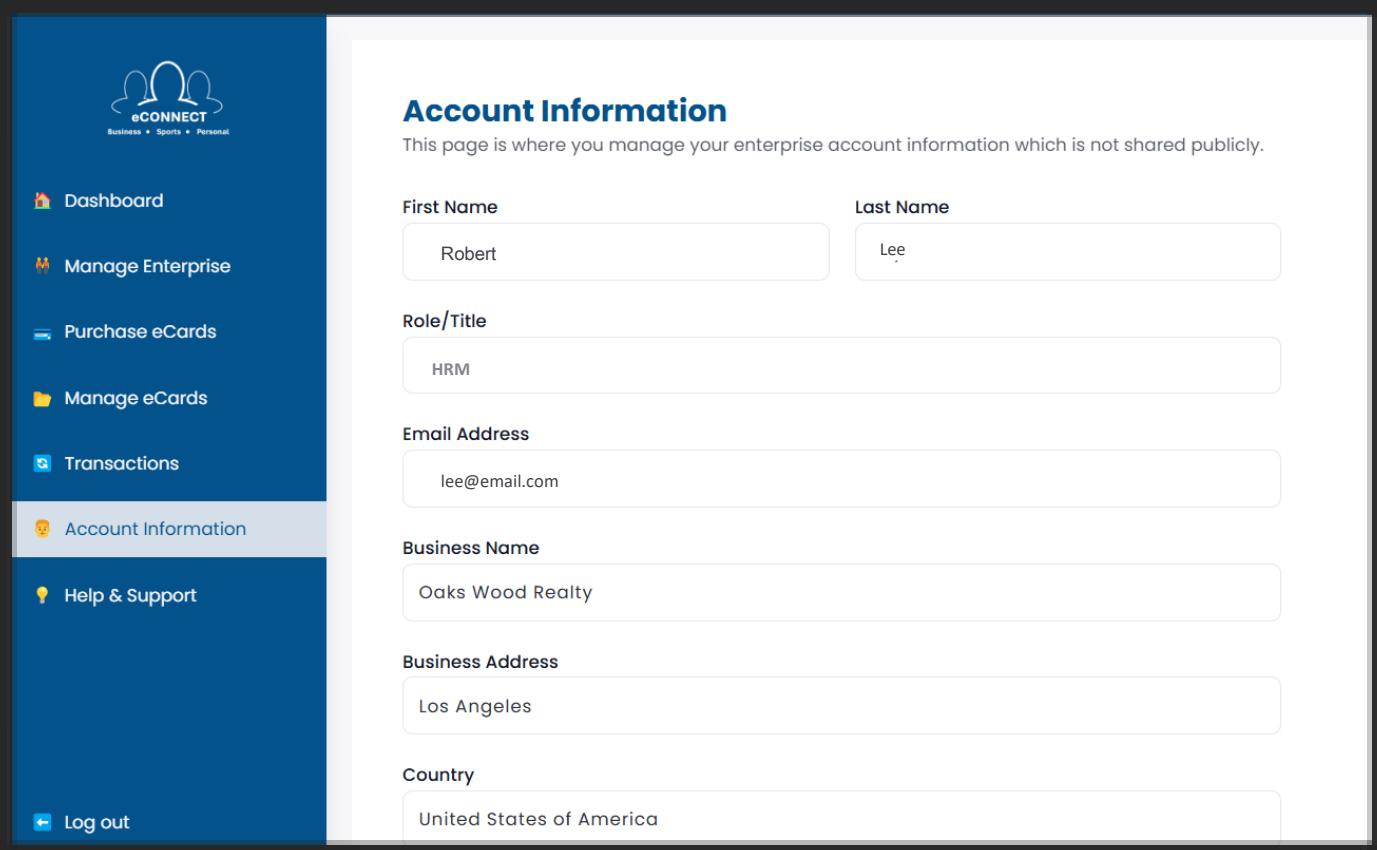


# Account Information Update



The **Account Information** tab allows the Account Manager to make changes to both personal and organizational information.

After changing the information, you can click on the 'Update' button to save changes.



The screenshot shows the eCONNECT mobile application interface. The left sidebar contains navigation links: Dashboard, Manage Enterprise, Purchase eCards, Manage eCards, Transactions, Account Information (which is the active tab, indicated by a blue background), and Help & Support. The main content area is titled 'Account Information' and contains the following form fields:

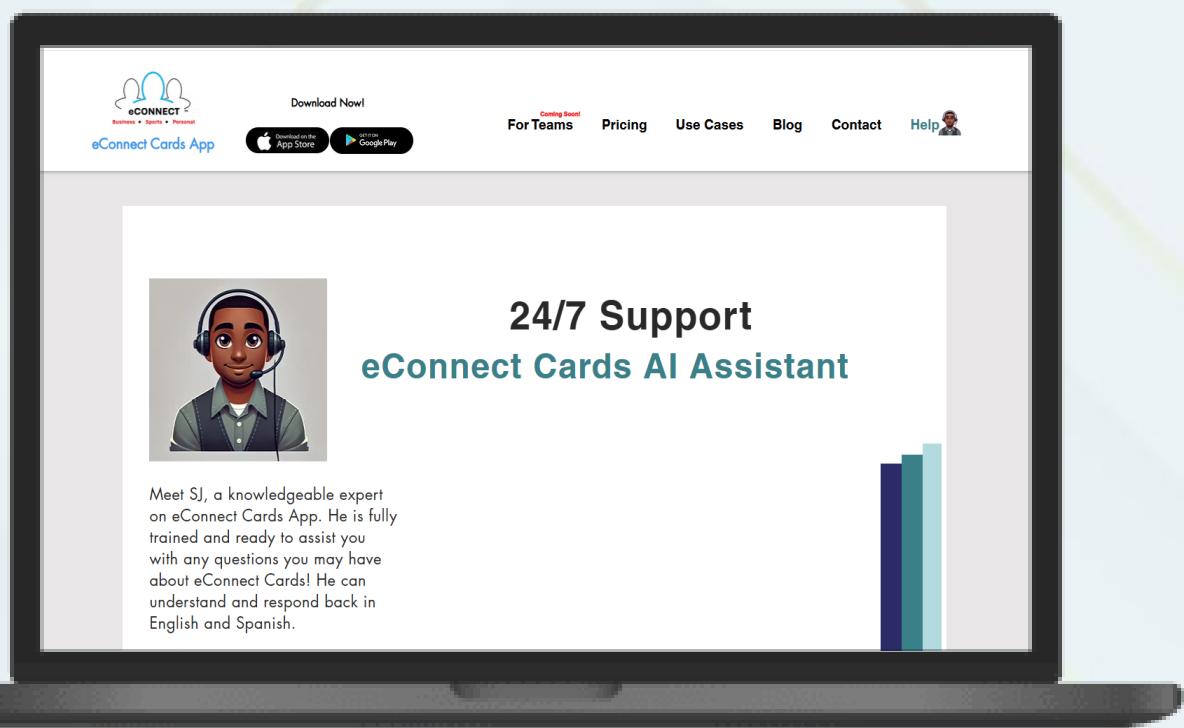
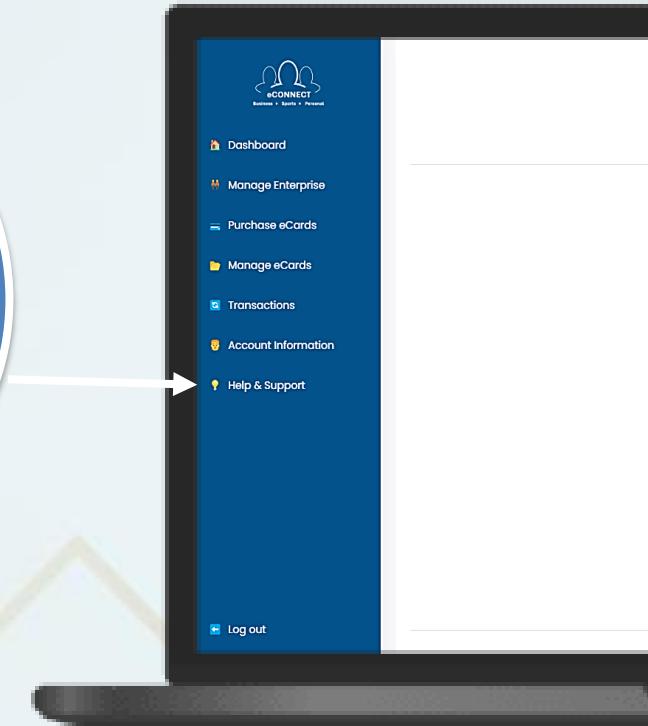
First Name	Robert	Last Name	Lee
Role/Title			
HRM			
Email Address			
lee@email.com			
Business Name			
Oaks Wood Realty			
Business Address			
Los Angeles			
Country			
United States of America			

# Support Center



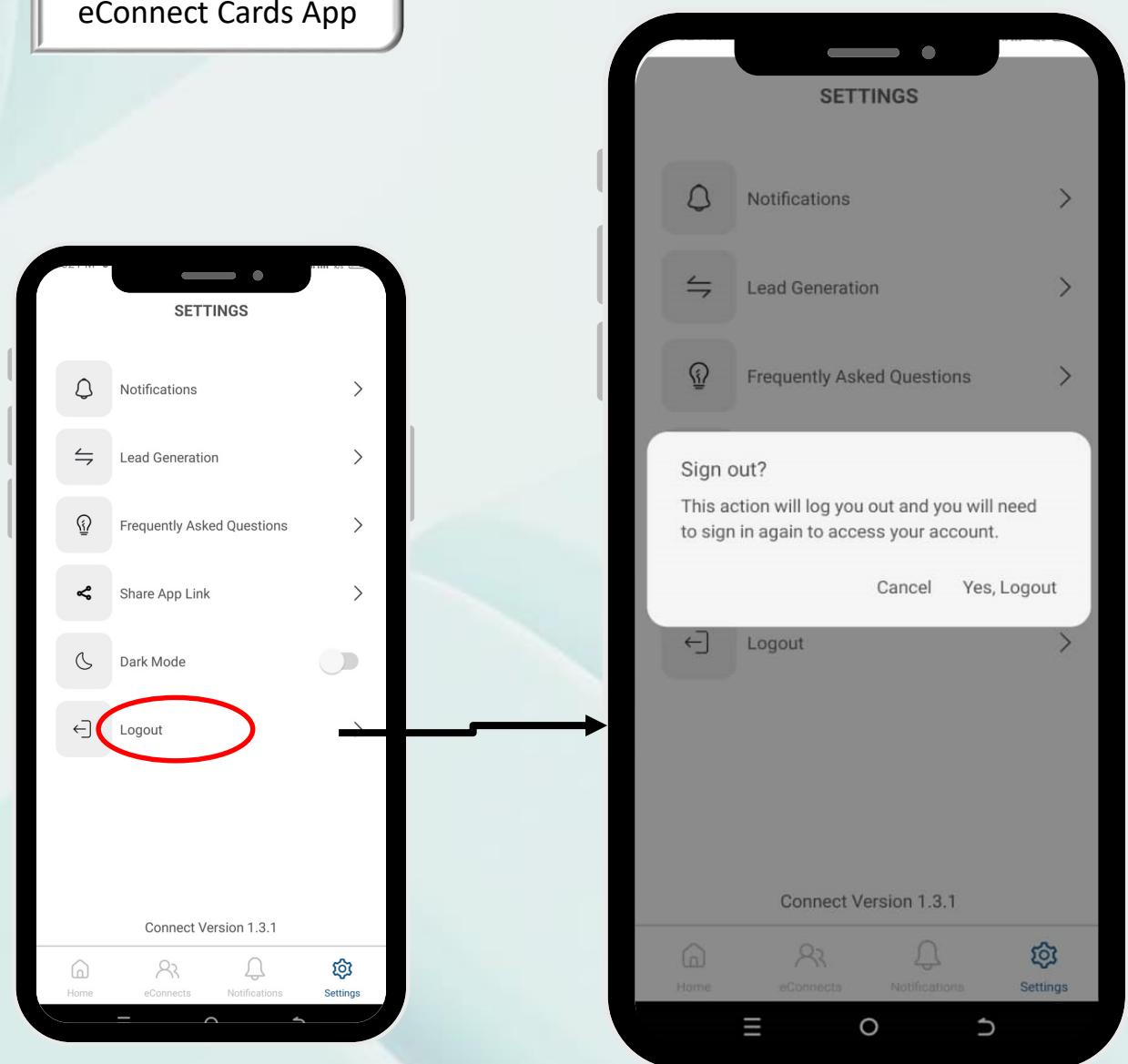
If you need assistance or have any questions, the **Help & Support** section provides a variety of resources to guide you. Here, you can find detailed step-by-step tutorials, troubleshooting tips, and more.

To access the support center, select the '**Help & Support**' tab



## 6. Sign Out

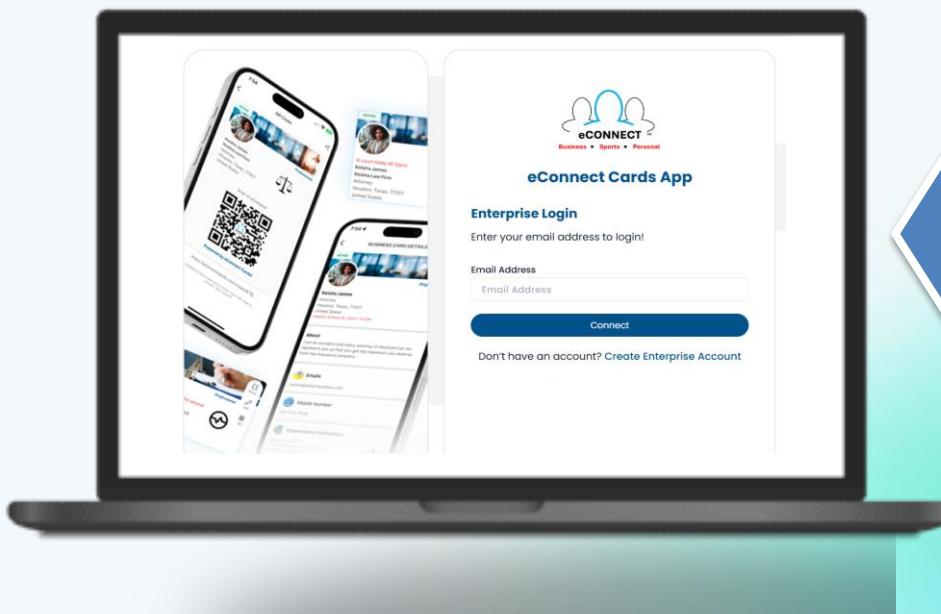
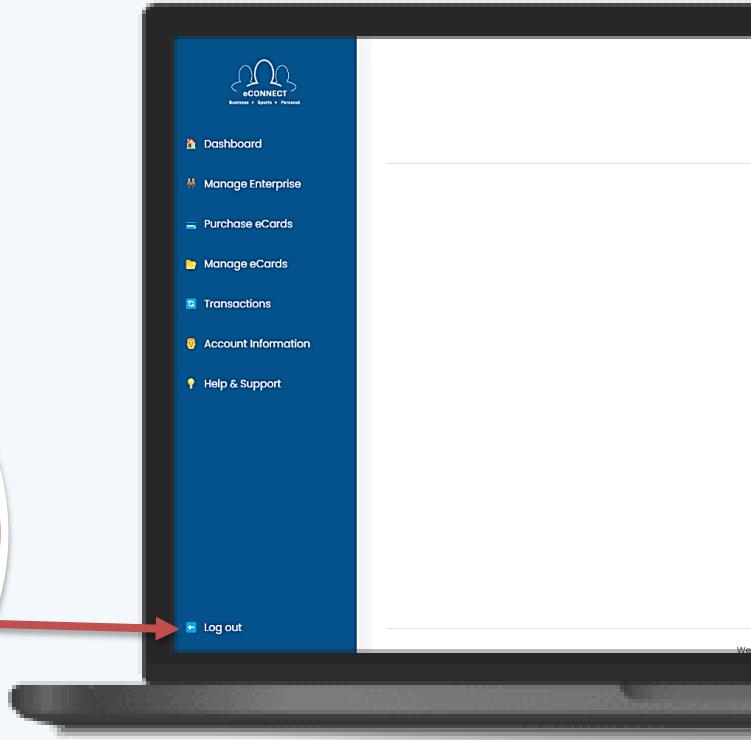
Click on 'Logout' to sign out of the eConnect Cards App



# Logging Out of the Enterprise Cards App



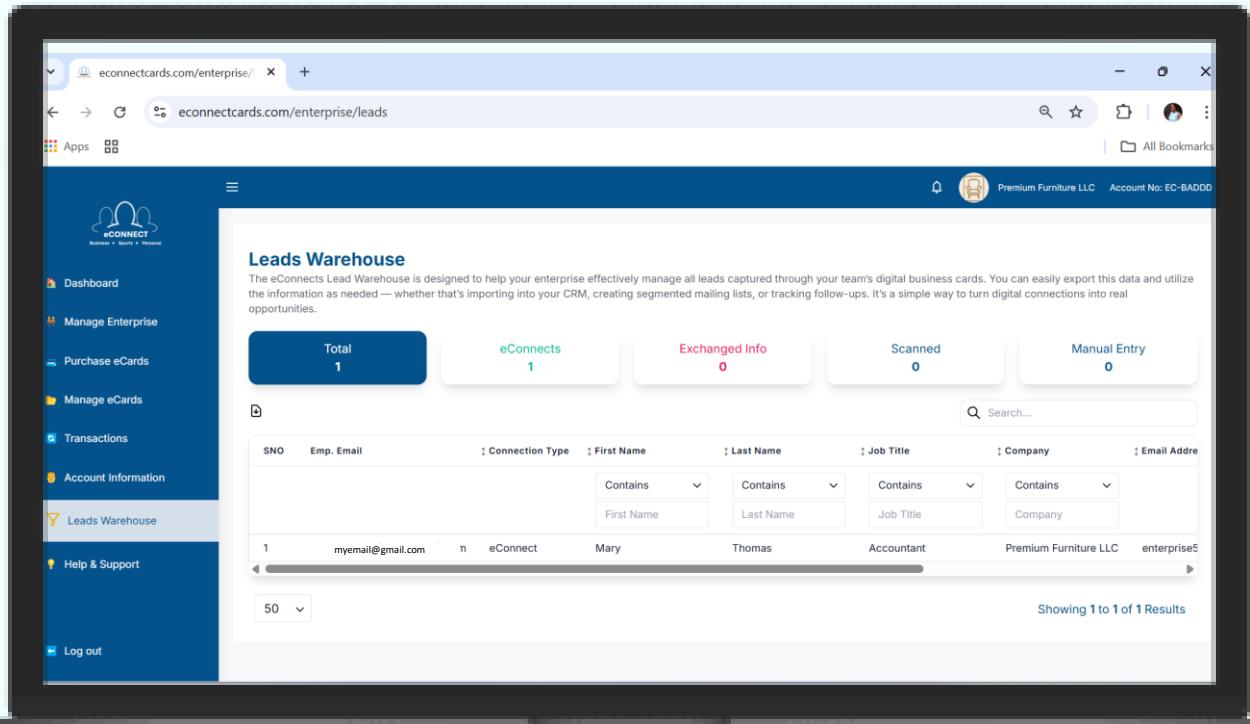
Click the Log Out button to sign out of the eConnect Cards Enterprise Portal.



After logging out, you will need to validate your email address in order to re-access the portal.

## What's New?

The eConnects Lead Warehouse helps your enterprise to efficiently manage all leads gathered via your team's digital business cards. With easy data export options, you can seamlessly integrate this information into your CRM, build targeted mailing lists, or monitor follow-up activity. It's a streamlined solution for transforming digital connections into real business opportunities.



The screenshot shows the eConnects Leads Warehouse interface. The left sidebar has a dark blue background with white text and icons. The 'Leads Warehouse' option is highlighted with a yellow background. The main content area has a white background with a dark blue header bar. The header bar includes the eCONNECT logo, a user profile icon, and the text 'Premium Furniture LLC' and 'Account No: EC-BADD'. The main title is 'Leads Warehouse'. Below the title is a brief description: 'The eConnects Lead Warehouse is designed to help your enterprise effectively manage all leads captured through your team's digital business cards. You can easily export this data and utilize the information as needed — whether that's importing into your CRM, creating segmented mailing lists, or tracking follow-ups. It's a simple way to turn digital connections into real opportunities.' Below the description are five summary cards with the following data:

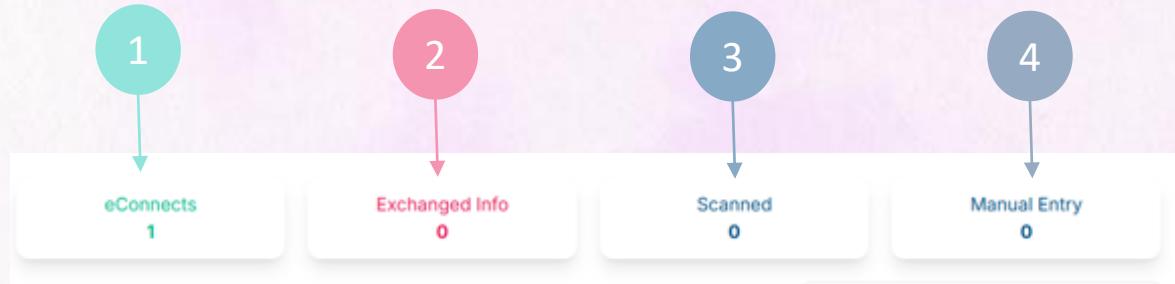
Total	eConnects	Exchanged Info	Scanned	Manual Entry
1	1	0	0	0

Below the summary cards is a search bar with the placeholder 'Search...'. Underneath the search bar is a table with the following columns: SNO, Emp. Email, Connection Type, First Name, Last Name, Job Title, Company, and Email Address. The table contains one row of data:

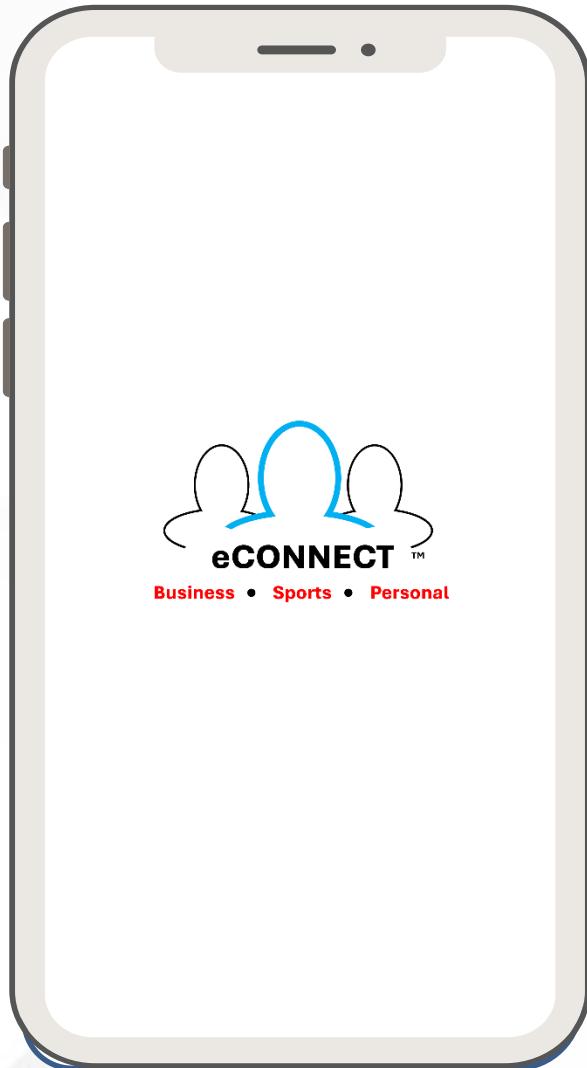
SNO	Emp. Email	Connection Type	First Name	Last Name	Job Title	Company	Email Address
1	myemail@gmail.com	eConnect	Mary	Thomas	Accountant	Premium Furniture LLC	enterprise5

At the bottom of the table are pagination controls showing '50' and 'Showing 1 to 1 of 1 Results'.

## Lead Warehouse tabs



- 1 Displays a list of users from the eConnect Cards App you've connected with.
- 2 Here, you'll find eConnect users who have shared their contact details with you
- 3 This area shows econnections made by scanning of paper business cards using the app
- 4 Shows a list of contacts you have manually added to your eConnect directory



## Contact Us

[www.econnectcardsapp.com](http://www.econnectcardsapp.com)

[support@econnectcards.com](mailto:support@econnectcards.com)

**SAAIG Technologies, LLC  
Headquartered in Cypress,  
Texas USA**

**Available for  
download on**

