

WorldCard Mac

User Manual

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PenPower Technology Ltd.

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There may be newer versions of the software that was released during or after this product's manufacturing date. If the content in the User Manual differs from the on-screen interface, please follow the instructions on the on-screen interface instead of the User Manual.

History

v4.1.0

- Adjust the software activation process.


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v4.0.0

- Year 2018, first version.

Chapter 1 Getting Started

1.1 Installation

1. If you want to install WorldCard Mac software on Mac system, please open App Store , and keyin [WorldCard Mac] in the search bar to find it.
2. Click [Get] button, and enter your Apple ID / Password to start free download, after downloading, you can find WorldCard Mac software in the system Application.

1.2 Connecting the Scanner

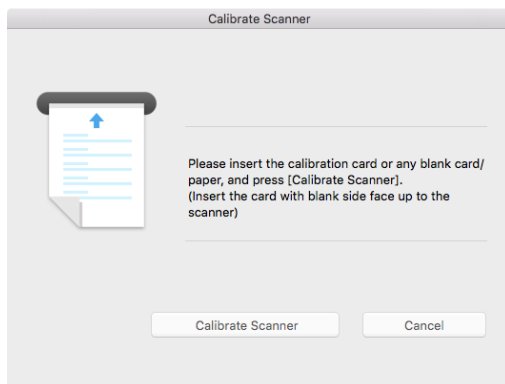
Please plug the USB connector coming from WorldCard Mac scanner into an USB port on the computer. The scanner driver will be automatically installed.

As a notice, please be reminded to pull up the scanner in a way, as shown by below photo, so that business cards can be placed into the scanner. The light will be flashing while scanning is in progress. You may scan the next business card only if the flashing stops and the scanner stepper motor stops functioning.



1.3 Calibrate the Scanner

It's not required for WorldCard Mac scanner to be calibrated for the first time. However it is necessary to calibrate the scanner if there is color distortion or a shaded line in the scanned image after being used for a while. You can click [Execute] / [Calibrate Scanner] and follow the instruction to calibrate.



Note: Please make sure the blank side of the calibration card is facing up when placing it on the scanner. If the calibration card is lost, you may use a piece of blank business card or paper instead.

1.4 Feedback


If you encounter a software error, you can click [Help] / [Feedback] to send the problem description to PenPower Technology Customer Service Department by Email. The system will automatically open your mailbox, and attach the needed information in the letter to analysis and troubleshooting. For more information, you can click on [WorldCard] / [About WorldCard].

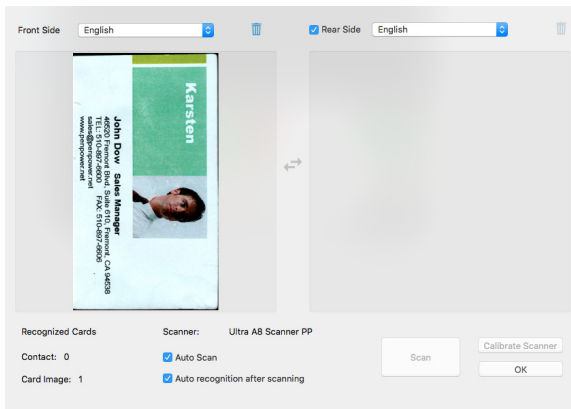
Chapter 2 Add a New Contact

2.1 Add a New Contact by Using a Scanner



2.1.1 By Scan Wizard

First of all, please plug the WorldCard Mac scanner cable into a computer's USB port, then you can lift up scanner cover and launch WorldCard Mac software.

After WorldCard Mac is launched, please click  on toolbar, select the recognition language for the front side of the business card. You may check on [Rear Side] and select the recognition language for the rear side of the business card if necessary. You may start scanning the front side of the business card and then the rear side when the light stops flashing from the previous scan. Click [Done] and the Scan Wizard will be closed. The contact information of the business card just scanned will be displayed in the contact list of the main screen.



Tips:

- 1. Auto Scan:** If checked, the scanning will be automatic when a business card is placed into the scanner. The recognition will be performed once the scanning is done. If not, [Scan] button must be clicked to initiate the scan.
- 2. Auto recognition after scanning:** If checked, the recognition will be automatically performed right after the scanning is done. If not, you have the chance to scan again if the image quality is not good and then click [Done] to perform the recognition.
- 3. You can scan multiple cards one by one without exiting Scan Wizard** if both [Auto Scan] and [Auto recognition after scanning] are checked.
- 4. Use  to delete card image and  to exchange the images of the front end and rear end.**

2.1.2 By Direct Scan

After WorldCard Mac is launched, you may place the business card into the scanner with the side to be scanned facing up. The card will be drawn in while the light is flashing and the scanned image will gradually appear on the lower right-hand corner of the screen. The recognition results will be shown in the contact list on the main screen.



When the light stops flashing, you may scan the other side of the card or just click [Skip] to proceed with the next card.



Tips: You can have a proper setup for recognition languages and others by clicking [Set up]/[Scan Options].

2.2 By Manual Input

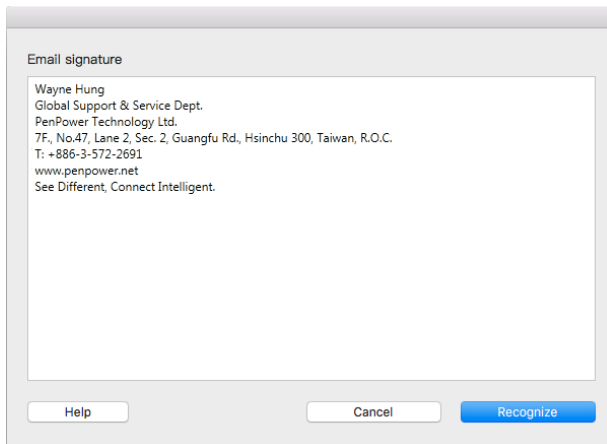
Click [Contacts] / [Add a Contact – Manually] to open a blank edit screen of fields for contact details. You can fill out the fields manually then click [Done] on the lower right corner of the screen to save the information you just entered.

2.3 Add a Contact from the Same Company

Select a contact from the contact list and then click [Contacts] / [Add a Contact – from the Same Company] to open a new edit screen of fields filled automatically with contact info such as Company, Address, Phone, Fax, and Website from the contact just selected. Other fields such as Name, Job Title, and Department are left blank for you to enter manually.

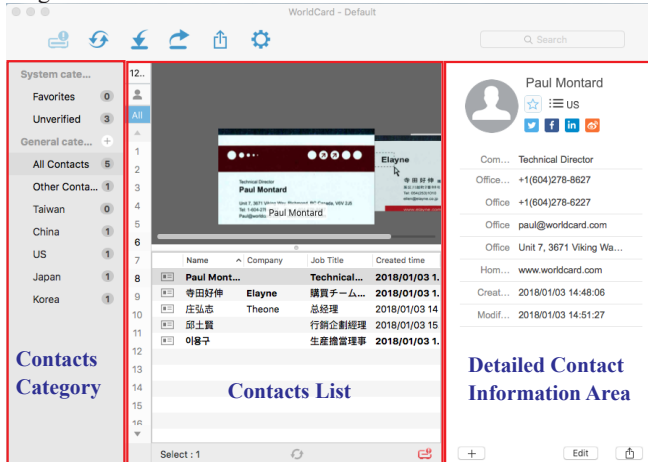
2.4 Add a Contact from Email Signature

WorldCard Mac can add a new contact from the signature of the received email. Click [Contacts] / [Add a Contact – Email Signature] to open a dialogue box for Email Signature. Copy an existing email signature, paste it on Email Signature dialogue box, and click [Recognize] to add a new contact record with contact info from the email signature.



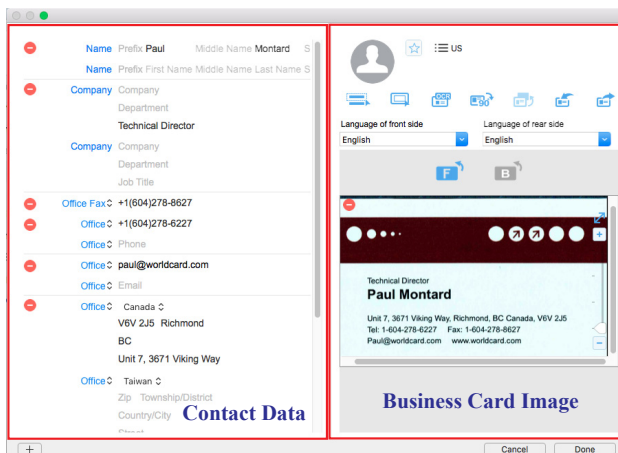
Chapter 3 Edit a Contact

You may add additional information to a contact or revise its recognition result by double clicking a contact from the contact list to enter the edit screen of a contact.



3.1 Edit Screen

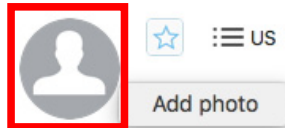
There are two sections in contact edit screen. [Contact Data], and [Business Card Image]. Click [Done] on the lower right side of the screen to save the edited work and exit the screen or click [Cancel] to drop the work.



3.1.1 Editing Contact Data

In [Contact Data] section, you may modify the content of any field. Besides, you can also:

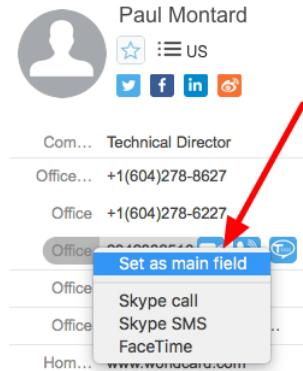
Add a Portrait Photo: Click on the avatar icon to add a portrait photo. Click on the existing portrait photo to replace with a new one or delete it.



Edit User Defined Field: When you want to create the user defined field, click the bottom on the lower-left to add the user Defined Fields, then you can enter those information in the edit page.

Add other Fileds: If you want to add information such as Instant Message ID, EIN number, or anniversary, click the bottom on the lower-left to add the relevant fields.








Tips: If you have multiple groups of names or phone numbers, you can adjust the field data to the field attribute by clicking on a field name of Detailed Contact Information Area in the main page and selecting [Set as main field].




3.1.2 Business Card Image

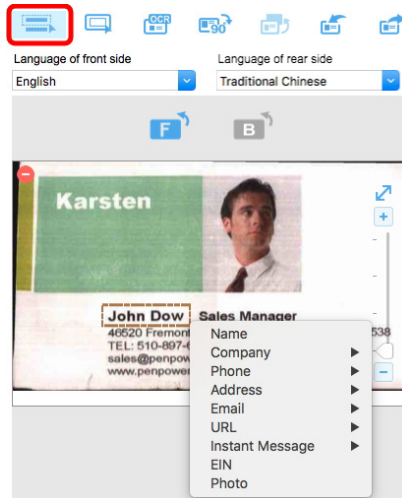
If there is a business card image, it will be displayed on the lower right-hand side of the contact edit screen. Here is what you can do:

Click and to review the images of the front end or rear end of the card.


- Click  on upper right corner of image the to expand the card,  to zoom in, and  to zoom out.
- Click  to rotate the card 90 degree.
- Click  to load a card image or to scan.
- Click  to export the card image to save.
- Click  on the upper left-hand side of the image to delete it.

⊙ Partially Re-recognize Contact Data

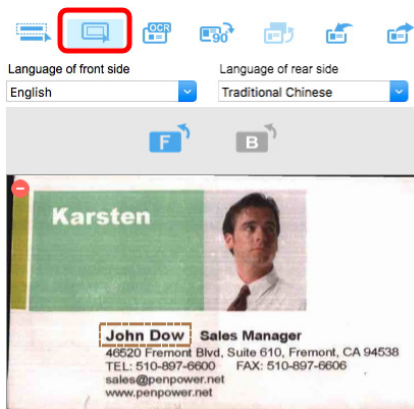
If the recognition result of a particular field is not correct or incomplete, you can use [Partially Select and Recognize] function to re-recognize this field. Click  first and crop this particular field on the card image with a blue dotted rectangle by holding the left click and dragging the mouse. A pop-up menu will be shown when you release the left click. Select the name of this field and the new recognition result will be assigned to that field. If you select Photo, the cropped image will be shown in the area of avatar icon.




⊙ Crop the Card Image Manually

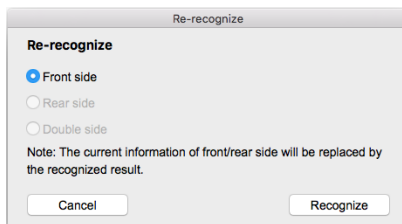
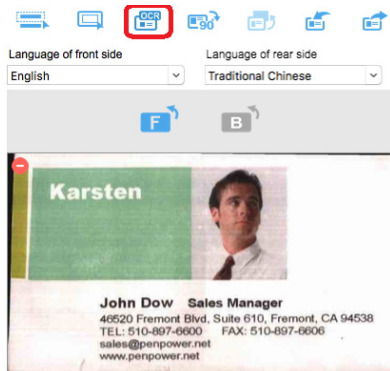
You can click  to crop the card image by holding the left click and dragging. When releasing the left click, a dialogue box of [Are you sure to modify] appears. Click

[Yes] and the area outside of the dotted rectangle will be removed.



● **Re-Recognize the Card**

Please confirm the recognition languages for both sides of the card first and click  to perform the recognition again. If you want both sides to be recognized again, please check on [Both Sides] and then click [OK].



Tips: If the business card is double-sided, you may click  to exchange the card images.

3.2 Delete a contact

In the contact list, right click on the contact you want to delete and select [Delete] to delete the contact information. Please note that the deleted contact can not be restored, please double check before deleting.

Chapter 4 Manage Contacts by Categories

You can better manage your contacts by placing contacts in different categories. Operations on contacts such as search, print, and import / export can be performed based on category.

4.1 Default Categories

There are four default categories: [All contacts], [Other contacts], [Favorites], and [Unverified]. They cannot be deleted or renamed.


My Favorites: Click  on the Detailed Contact Information Area to add this contact into [My Favorites] category. Click  again will remove it.

Other Contacts: All contacts not placed in any other category will be placed in [Other contacts]. Contacts coming from other software through synchronization are usually placed here.

Unverified: Unverified contacts are shown in boldface meaning they haven't been edited yet. The unverified status will be changed after you edit it.

4.2 Add a Category

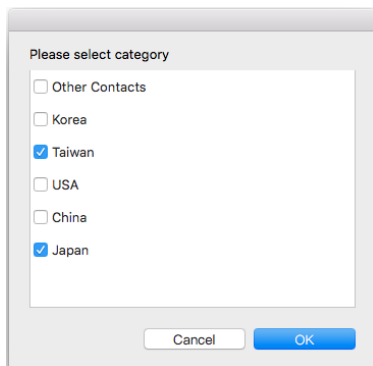
There are two ways to add a category:


1. Click [Contacts] / [New Category], and then enter the category name.
2. Click  beside the [General Category] on the left section, and then enter the category name.

Notice : New category cannot have the same name as that of the existing one.

4.3 Assign a Category to a Contact

If you want to assign a category to a contact, please right click on that contact and click on [Change category] from the pop-up menu to open the category list, and tick on the category you want to assign.




In Detailed Contact Information Area, you may also click  to the right of the avatar icon to assign a category to the contact.



A contact can belong to multiple categories. For example, a contact can be in both category “Friend” and category “Supplier”. You can make multiple selections of categories on category management screen.

4.4 Change the Name of Category / Delete a Category

To change the category name, right-click on the category and select [Change category name] to enter a new category name.

To delete a category, simply move the mouse over the selected category, the deleted icon  will appear, and click to delete it.

Reminder: Once a category is deleted, all the contacts in this category that don't belong to other category will be re-categorized to [Other contacts]. Contacts associated with other categories are still accessible through other categories.

4.5 Adjust the Category Order

When you create multiple categories, you can adjust the most used category to the top to manage and use.

Drag any category with left mouse button long pressed can easily adjust the order.

Chapter 5 Functions for Reaching Contacts

WorldCard Mac provides many functions for reaching contacts. You may send an email, make a Skype call, open a website, and search the contact on the social media.


Tips: Press the Command or Shift key on the keyboard with the left mouse button to multi-select contacts in the contact list.

5.1 Send an Email




To send an email, you can right click on the selected contacts or a category and select [Send Email] from the pop-up menu, then press [To], [CC], or [BCC] button depending on the way through which you want to send the mail to contacts, and then the default Email software will be launch for you to start wrting the Email, and the contacts' Email addresses will be inserted in.

Reminder: The recipient of the Email has a limit on the number, and can only send up to 50 contacts at a time.

5.2 Share Contact Information via Applications

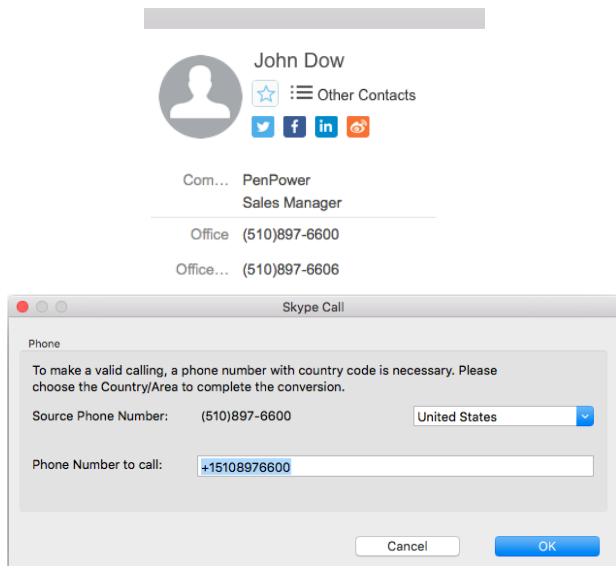
Click  on the toolbar after selecting contacts, and choose [Share via APP] to share the contact information to others via applications.

5.3 Skype / FaceTime


When move the mouse cursor on the phone number information of the Detailed Contact Information Area, the  /  will appear, you click it to make Skype calls or click  to send Skype texts.


You can also right click on the contact to make Skype Calls or Texts

Reminder: Skype software needs to be installed before a Skype call can be made, and you need to have Skype credit to make a Skype-out call. If the phone number doesn't come with the country code, a Skype Call screen will be called up for you to select the country code.







5.4 Open Website / Display Map of Address

If a contact information includes URL of company or any website, right click on the contact and choose [Open Website] can open that webpage. Or move the mouse cursor on the URL information of the Detailed Contact Information Area, then the  will appear, you can also click it to open webpage.

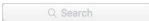

In addition, if a contact information includes any address information, right click on the contact and choose [Display Map of Address], Google Map or Baidu map webpage will be opened for you to use. Or move the mouse cursor on the address information of the Detailed Contact Information Area, the  will appear, then you can also click it to open map.

5.5 Search on Social Network

In the Detailed Contact Information Area, you can click on     icon to search the contact's information on [Twitter], [Facebook], [LinkedIn] or [Weibo] social Networks.

Chapter 6 Searching Contacts

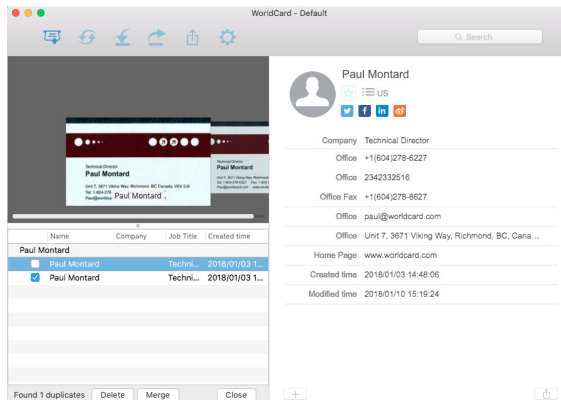
6.1 Keyword Search

You can use keyword search to quickly find contacts. Enter keywords in the search bar  on the WorldCard Mac main page to start the search and list the results. Click  icon to clear the texts in the search field and return to the main page.

6.2 Find Duplicates / Contacts of The Same Name

Click [Contacts] / [Duplicate Contacts] or [Contacts of Same Name] to filter duplicates. If you wish to delete duplicates, click [Delete]. Only one contact will remain for each set of duplicated contacts. If you wish to manually choose which duplicated contacts to delete, right-click the contact and select [Delete].

Tips: When deleting duplicate contacts, system will keep the latest information, in case user delete the information by mistake.



Chapter 7 Sync / Import / Export

Users can use Import / Export / Sync to transfer contacts data to other applications. For example, if you want to use the contacts in System Contact, you just need to export the contacts from WorldCard Mac to System Contact. If you want to edit the contacts on System Contact, just simply sync again after editing to update the latest information on both ends.

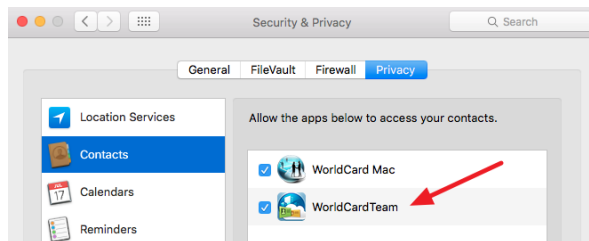
7.1 Synchronization

WorldCard Mac software can update your new or edited data to your Gmail contacts or system contacts through a synchronization mechanism. Similarly, when updated information is available on your Gmail contacts or system contacts, just sync again to update data to WorldCard Mac software.

Please click [Contacts] / [Sync] or click  on the toolbar to start, and choose the following applications to sync:


⦿ System Contact

The first time to sync, you will be asked to provide authority for WorldCard Mac to access. Please go to [System Preferences] / [Security & Privacy] / [Privacy], Click [Contact] and check the [WorldCard Mac] on the right hand side, then you will be able to sync the data. You can see the progress of the sync at the bottom of the screen.




Everytime you launch WorldCard Mac software, it will sync with WorldCard Tem server automatically. If you turn on the auto sync, the system will check every 5 minutes and auto sync between device and server.

⦿ Gmail Contacts


To sync with your Gmail Contacts, please click  on the toolbar at the top of the main screen and switching to the [Sync] page to sign in your Gmail account at first, and

you can check to enable the [Auto-sync] feature if you want.

If you have Auto Sync enabled, your WorldCard Mac software will be synced with your Gmail contacts every time you run it, and every 5 minutes, it will check with Gmail Contacts and sync with your Gmail contacts automatically if there is any modification.

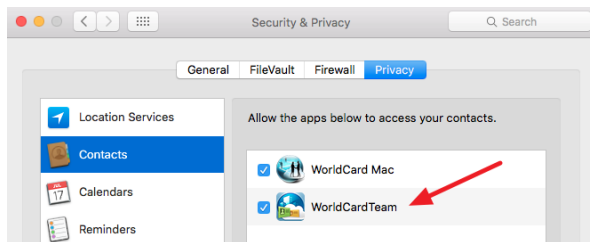
To synchronize the data manually, click [Contacts] / [Sync] or click  on the toolbar to start the synchronization. You can see the progress of the sync at the bottom of the screen.

7.2 Import

WorldCard Mac provides many sources for you to import contacts to use, please click [Contacts] / [Import], or click  on the toolbar, and choose the source:

⦿ System Contact

Select [System Contact] and click [Next]. You will be asked to provide authority for WorldCard Mac to access. Please go to [System Preferences] / [Security & Privacy] / [Privacy], Click [Contact] and check the [WorldCard Mac] on the right hand side, then you will be able to import the data.



You can see the information at [All Contacts], original category or [Other Contacts] after importing.

⦿ WorldCard Data Exchange File(*.wxf)

Wxf format is compatible with all Worldcard products, it is the best choice to transfer contact data on different operation systems.

Select [*.wexf], click next to choose the local source then start to import; If you'd like to import from cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

Tips: Tick [Keep original category] when importing wexf file, then all category information will be kept.

☉ Image File (*.jpeg)

Choose [Image File (.jpeg)] and click next. Choose the file to import and select language to recognize. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

☉ vCard file (*.vcf)

Choose [vCard file (.vcf)] and click next. Choose the file to import. ; If you'd like to import from cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

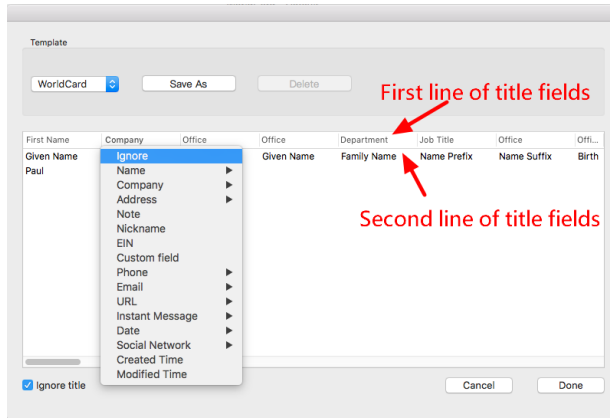
☉ CSV File (*.csv)

Choose [CSV file (.csv)] and click next. Choose the file to import. ; If you'd like to import from cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first.

The second line of field titles on the import screen is the field titles of the CSV file you want to import. You must click on every field title of the first line of field titles and adjust them to match to the second line field titles for the data can be imported correctly.

If your CSV file is from any WorldCard product or from Outlook, you can click the template drop-down menu in the upper left to select the WorldCard or Outlook options to quickly match the field titles.

If you do not want to import some fields, please click on that field titles of the first line of field titles, and select [Ignore], the field data will be ignored when importing. Once completed, you will be able to see the imported contact information in [All Contacts], [Originally Assigned Categories] or [Other Contacts].



Tips: After you fill all the information, you can click [Save As] button in the Template section to save as template for future use.

Caution: If the first row is contact information but not field titles, please tick [Import the first row].

7.3 Export

You can export WorldCard Mac's contact data to a different file formats, depending on the range of your data, such as selecting a few specific contacts or all contacts.

Go to [Contacts] / [Export] or click  on the toolbar then select the target to export, and select the data range below.

Select [All card information], then all contacts will be exported; Select [All cards in the preview area], only the card in that page view will be exported; Select [Selected cards], only the card has been selected will be exported.

● Microsoft Outlook

Choose [Microsoft Outlook] and select the data range and file path to save, then click [OK] to start exporting, then you will see the exported data in [Microsoft Outlook].

● Image File(*.jpeg) / Microsoft Excel(*.xlsx) / Text file(*.txt) / CSV File(*.csv) / vCard

File(*.vcf)

Choose the target you need, and select the data range and file path to save, and click [OK] to start exporting, you will see the exported file in the assigned location. In addition, when exporting CSV or Excel format, you can choose whether to divide the address data into five fields (country / province / street ...).

Tips:

1. You can select the contacts on the contact list, and right click on them to export.
2. For CSV format, you can choose two different formats to export: Google Contacts / Mac Contacts vCard (Unicode) and MS outlook vCard (ANSI).

7.5 WorldCard Data Exchange Compatibility List

Import

Item	Version
System Contact	Mac OS X 10.11 and above
WorldCard Data Exchange File *.wexf	all
CSV File	all
vCard File	2.1/3.0
Image Files	all

Export

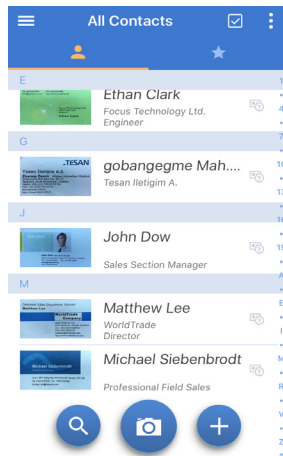
Item	Version
Microsoft Outlook	2011
System Contact	Mac OS X 10.11 and above
Image Files	all
Microsoft Excel	2011
CSV File	all
vCard File	2.1/3.0
Text File	all

Chapter 8 Exchange Data with Mobile Devices


You can sync WorldCard contacts with your mobile devices (via WorldCard Mobile app on iPhone and Android) through the sync function of Google Contacts. You can also use WorldCard Data Exchange File (*.wxf) to share your contacts.

8.1 iPhone

If you have iPhone, you can search [WorldCard Mobile] on APP Store to download, then open the app, and refer to the instructions below to Sync/Import/Export your contacts.



8.1.1 Sync with Gmail Contacts

1. Tap the  icon on the main screen to open the menu, and tap [Sign In] to enter your Gmail account/password, and then accept the authorizations that WorldCard Mobile asked for.
2. Before having the first synchronization, please tap [Auto Sync] to choose to let WorldCard Mobile sync with Gmail contacts automatically when there is Wi-Fi or mobile network connected, or when only Wi-Fi connected can do the synchronization.
3. After setting, tap [Sync] or drag down the screen when in the contacts list, the WorldCard Mobile will start to sync.

Note: After first syncing, the category list will be added a few default categories that belongs to

Gmail contacts, please note these categories are not able to be deleted.

8.1.2 Import

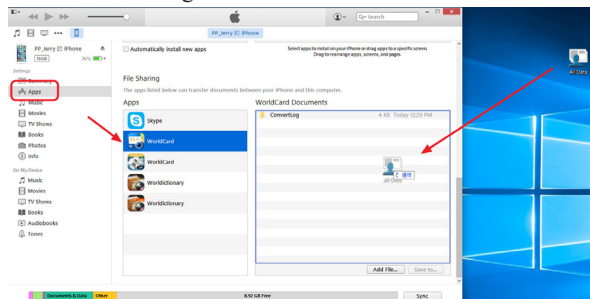
Import wcx, vcf, csv file from computer


If you want to import the exported wcx, vcf, csv file into iPhone's WorldCard Mobile, you have to import it via iTunes. The following steps are the instructions for importing wcx, file into iPhone:

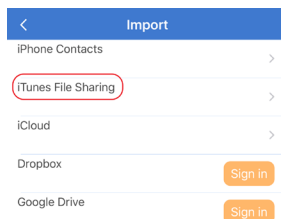
1. Please connect your iPhone with the computer and open iTunes. Then, tap the iPhone device button.




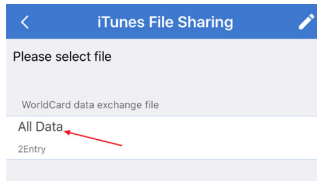
2. When you enter the summary page, please tap [Apps] to switch to app page, and go to File Sharing section to search for WorldCard app and click it. You will see all the files of WorldCard in the document storage area. Select and drag the exported wcx, file into the document storage area.





3. Open WorldCard Mobile, and then tap the  icon on the main screen, and choose [Import], and choose [iTunes File Sharing], then you will see the file you just dragged in.



4. After confirming the file name, please tap  to start importing.
5. When the import progress is done, you can find the imported contacts' information in WorldCard Mobile's contact list.





Import wcxf, vcf, csv file from Cloud storage

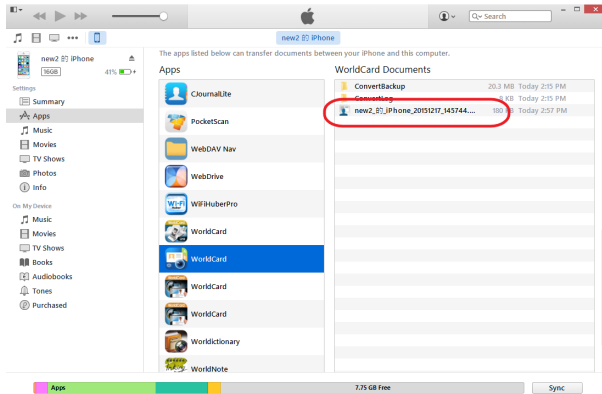
6. Tap the  icon on the main screen, and choose [Import] to choose to import the contacts from cloud storage. Tap  to start importing after you select the files.
7. The file formats that WorldCard Mobile supported are: WorldCard Exchange File (*.wxcf) and vCard file (*.vcf). When you choose to import from cloud storage, WorldCard Mobile will search and list all the usable files. Moreover, the first time you choose to import from cloud storage, it will ask you to enter the account/password of the cloud storage to access.

8.1.3 Export

Export wcxf, vcf, csv file to computer

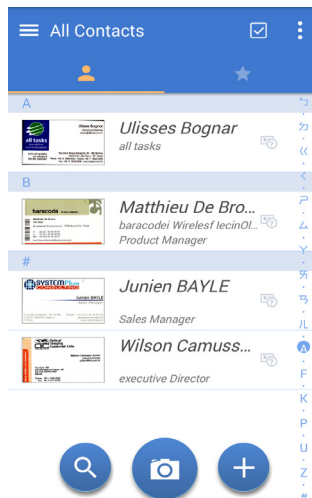
1. Tap  icon on the main page to select the contacts which you want to export.
2. Tap  icon to open the menu and choose [Export].
3. Choose the location to save the exported file, E.g. Dropbox, then you can decide to export the contacts into WorldCard Exchange File (*.wxcf), vCard file (*.vcf) or CSV file (*.csv).
4. When the export success message pops out, you can connect your phone and the computer to find the exported file. Open iTunes and tap the iPhone device button.
5. When you enter the summary page, please tap [Apps] to switch to app page.
6. Go to File Sharing section to search for WorldCard app and tap it. You will see all the exported files of WorldCard in the document storage area. Select the file you want to export and tap [Save to...]. Then, you can save the exported file to the

computer and open it with WorldCard software.




8.2 Android

If you have Android phone, you can search [WorldCard Mobile] on Google Play to download, then open the app, and refer to the instructions below to Sync/Import/Export your contacts.





8.2.1 Sync with Gmail Contacts

1. Tap the  icon on the main screen to open the menu, and tap [Sign In] to enter your Gmail account/password, and then accept the authorizations that WorldCard Mobile asked for.
2. Before having the first synchronization, please tap [Auto Sync] to choose to let WorldCard Mobile sync with Gmail contacts automatically when there is Wi-Fi or mobile network connected, or when only Wi-Fi connected can do the synchronization.
3. After setting, tap [Sync] or drag down the screen when in the contacts list, the WorldCard Mobile will start to sync.

Note: After first syncing, the category list will be added a few default categories that belongs to Gmail contacts, please note these categories are not able to be deleted.



8.2.2 Import

Import Contact File

1. Tap the  icon on the main screen, and choose [Import File] to choose to import the contacts in the phone, or import the contact files from the local storage or cloud storage. Tap  to start importing after you select the files.
2. The file formats that WorldCard Mobile supported are: WorldCard Exchange File (*.wxf) and vCard file(*.vcf). When you choose to import from local storage, WorldCard Mobile will search and list all the usable files. Moreover, the first time you choose to import from cloud storage, it will ask you to enter the account/password of the cloud storage to access.

8.2.3 Export

Export wxf, vcf, csv file to computer

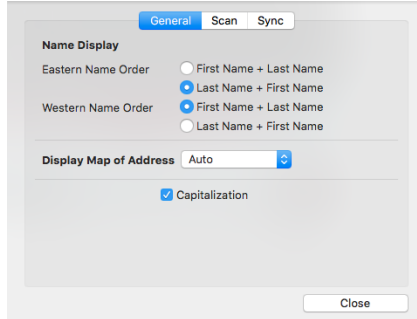
1. Tap  icon on the main page to select the contacts which you want to export.
2. Tap  icon to open the menu and choose [Export].
3. Choose the location to save the exported file, E.g. Dropbox, then you can decide to export the contacts into WorldCard Exchange File (*.wxf), vCard file(*.vcf) or CSV file(*.csv).

4. Connect the phone with your computer then open the folder of WorldCard Mobile in the phone's memory card and you can find the exported file.

Chapter 9 Settings

You can adjust all settings by click the  on the top right to go to set up menu at main screen.

9.1 General Settings



9.1.1 Name Display

You can adjust how to show the contact name, you can adjust the display order by Last, First or First, Last.

9.1.2 Map Display

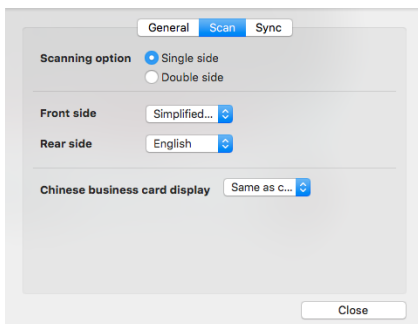
You can choose the different map to check the address.

- **Auto:** System will identify the location of the contact, if the person is in China, system will switch to Baidu Map and Google Map for other countries.
- **Google Map:** Use Google Map as default Map.
- **Baidu Map:** Use Baidu Map as default Map

9.1.3 Capitalize for Surname

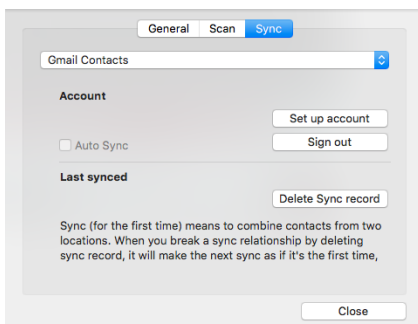
Capitalize will be default setting for name sorting in Western sorting. You can adjust it at any time.

9.2 Scan Settings



You can define to scan single side or double side, front / back side language or Chinese character set.

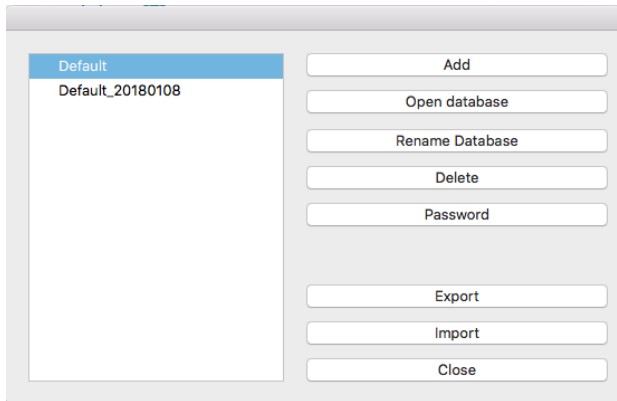
9.3 Sync Settings



To find the settings for different software, please refer to Chapter 7 for more information.

Chapter 10 Database Management

To manage your database, click [WorldCard] / [Database] to open the management settings.



10.1 Create New Database / Delete Database

You can create different databases to manage contacts of different attributes or met at different date. Please click the [Add] button, and fill in the name of the database, press the [OK] to create the new database.

If you want to delete a database, click the database you want to delete, and make sure the data inside has been backed up or no longer used, then click the [Delete] button to delete.

10.2 Open Existing Database / Change Database Name

After creating a new database, or you want to switch to another database, please select the database you want to use, and click the [Open Database] button to switch to the database.

If you want to change the database name, please select the database you want to change, and click the [Rename database] button, and then enter the new name to complete.

10.3 Set Password / Change Password

If you need to set a password to protect the database, please select the database you want to encrypt, then click the [Password] button, then check the [Password] option to enter your password, then click [OK] to complete.

If you want to change the password, please click the [Password] button and input the current password, then you can enter a new password to replace.

If you want to remove the password, please click the [Password] button and input the current password, then uncheck the [Password] option to remove the password.

10.4 Export / Import Database

If you want to back up the entire database or transfer the database to another computer to use, please select the database you want to back up, and click the [Export] button, then enter the file name, and select the storage path, then click [Save] button to export.

If you want to restore the database, please click the [Import] button, and select the database file you want to restore to start to import.

WorldCard Mac v4.2 User Manual

Manufacturer: PenPower Technology Ltd.

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