

WorldCard Enterprise

User Manual for Admin

Version: v1.5.0 for Web

Release: December, 2014

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Chapter 1 Getting Started

1.1 Log in

When you open the login page of WorldCard Enterprise, please choose [WCE Account] option and enter your account and password to log in to the server.

Note: The preset Account for administrator is “Admin” and the preset Password is “aaaaaa”.

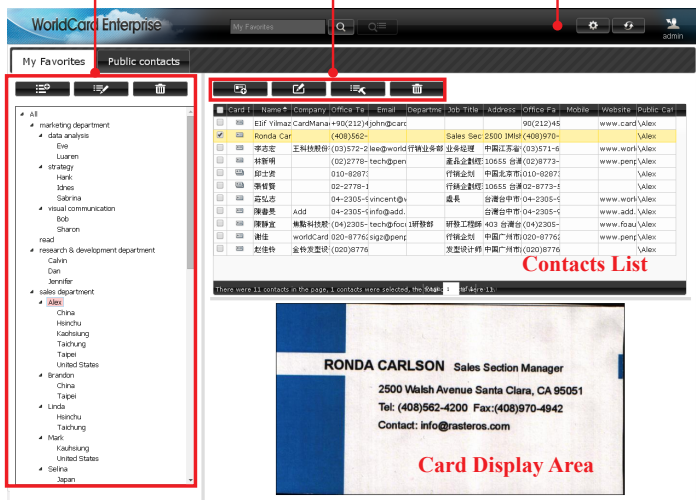


1.2 User Interface Introduction

1.2.1 My Favorites

When you log in to the system, you will see [My Favorites] as the preset page. Users can manage personal and frequent-used business cards in this area. If you have added public category to [My Favorites], then you can view those added categories' cards information in [My Favorites] page. There are five sections in [My Favorites]: Category Manage Area, Card Editing Area, Functional Toolbar, Contacts List and Card Display Area. The following are the introduction for these sections:

Category Manage Area Card Editing Area Functional Toolbar



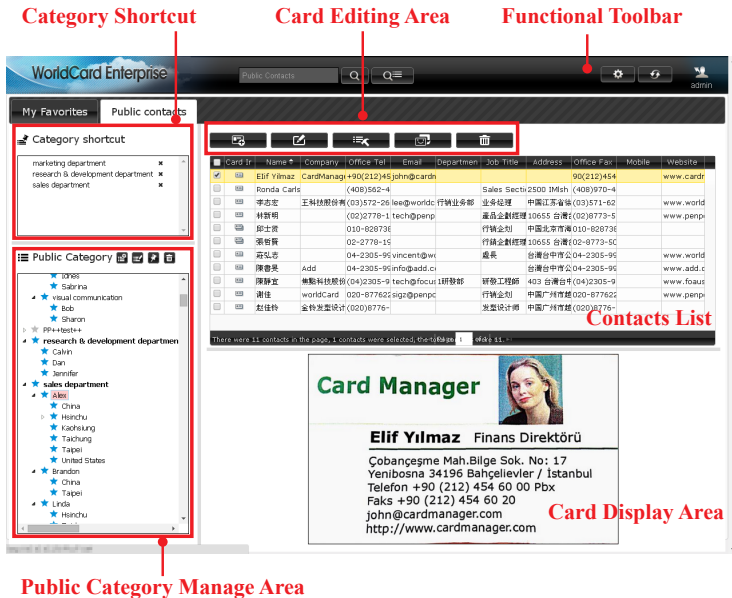
- Category Manage Area: Add/ edit/ delete/ view cards' category and switch between [My Favorites] and [Public Contacts] page.
- Card Editing Area: Add/ edit/ delete/ categorize business cards.
- Functional Toolbar: Search bar, setting button, refresh button and log out button.
- Contacts List: View Contacts information.
- Card Display Area: View business cards' original image.

1.2.2 Public Contacts

Category Manage Area contains [My Favorites] and [Public Contacts]. If you want to switch [My Favorites] to [Public Contacts] page, please click the [Public Contacts] tab on top of the category manage area.



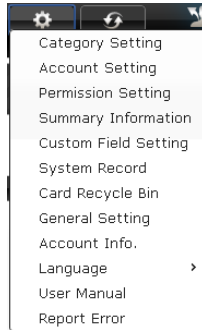
[Public Contacts] is the database for all users to manage and share cards information. The system will base on every user's authority to show how many categories he or she can view and use. There are six sections in [Public Contacts]: Category Shortcut, Public Category Manage Area, Card Editing Area, Functional Toolbar, Contacts List and Card Display Area. The following are the introduction for these sections:



- **Category Shortcut**: You can add public category here so as to speed up viewing category's cards information.
- **Card Editing Area**: Add / edit/ delete/ categorize business cards and copy cards to [My Favorites].
- **Functional Toolbar**: Search bar, setting button, refresh button and log out button.
- **Contacts List**: View Contacts information.
- **Public Category Manage Area**: Add/ edit/ delete/ view cards' category, switch between [My Favorites] and [Public Contacts] page, add public category to [My Favorites], and add public category to Category Shortcut.
- **Card Display Area**: View business cards' original image.

Chapter 2 Admin Setting Management

Click  on the Functional Toolbar, you can open Setting's drop-down menu. By selecting the options, you can set user accounts, cards' categories, user defined fields, automatic update setting. Also, you can view the system record and restore the deleted cards and so on.

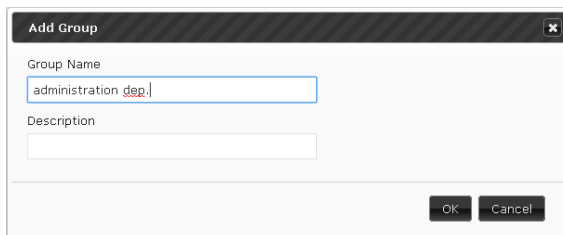


2.1 Account Setting

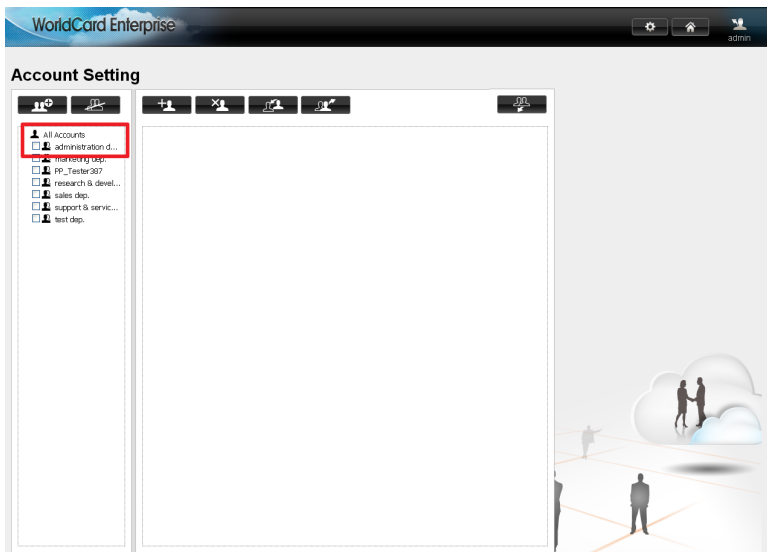
Choose [Account Setting] in the setting menu to enter the account setting page and edit users accounts and groups. If you want to return to Home Page, please click .

2.1.1 Add Group

1. Click , the system will open the add group window.



2. Type in the group name and click [OK], you can see the newly added group name shown in the group list.



Note: If you want to edit the group name, double-click the name in the list can open the edit group window.

2.1.2 Delete Group

Check the group you want to be deleted and click , the checked group will be deleted from the list.

2.1.3 Add Account

1. Click , the system will open the add account window. Fill in the user's account, password, e-mail address, description and click [Browse] to select the root category for the user.

Note: You need to add category before selecting the root category for the user. For more details about Add category, please refer to Chapter 2.2.1 [Category Setting].

Add Account

User Name
Alex

Password

Input password again

Email
alexwho@gmail.com

Root category
\sales department\Alex **Browse**

Description
manager

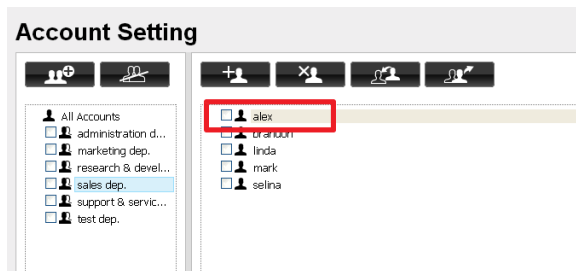
☒ Enable My Favorites function
☐ Reminder to change password in next login.
☒ Enable Export contacts function
☐ Disable the account

OK **Cancel**

2. You can check the option below the user information fields to set user's related permission.

- Enable My Favorites function: User can have [My Favorites] page to manage personal business cards.
- Reminder to change password in next login: While logging in the account, the system will remind the user to change his/her password. If the user didn't change it, the change password message will appear everytime the user log in.
- Enable Export contacts function: User can export contacts information in [My Favorites].
- Disable the account: Temporarily close the account and its permission.

3. When you finish the user's information and the related permission setting, click [OK] and the added account will show in the account list.



Tip: If you want to edit account information, double-click the account can open the edit account window.

2.1.4 Delete Account

Check the account you want to deleted and click , the checked account will be deleted from the list.

2.1.5 Group Member Management

1. Select the group you want to categorize in the group list.
2. Click  and check the account in the account window and click [OK]. Then, the checked account will be added into the selected group.

Tip: If you want to remove the account from the group, please check the account and click



2.1.6 Import AD Server Accounts

If your company had AD server, you can directly import the accounts without creating them again.

1. Clic import button  to open.
2. Fill in the [IP address], [Account], [Password], [Port] and [Base DN] of AD server, you can refer to the picture below for example.
3. If you select [The group of account created automatically], WorldCard Enterprise will create the group name by using the same name as AD server.
4. If you select [The root category of account created automatically], WorldCard Enterprise will auto create the root category based on the information of AD server.

5. If you select [Ignore the below account when you import accounts], it allows you to ignore the specific accounts when importing, please add comma between accounts to separate.

Import account from AD server.

AD server

Account

Password

Port

Base DN

☒ The group of account created automatically
☒ The root category of account created automatically
☐ Ignore the below account when you import accounts

(Please enter the account that will be ignored. if you need to ignore more accounts, you must add the semicolon symbol between the accounts.)

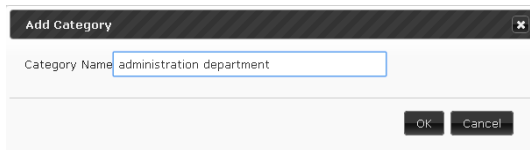
OK **Cancel**

2.2 Category Setting

Choose [Category Setting] in the setting menu to enter the category setting page and add/delete/edit the categories. If you want to return to Home Page, please click .

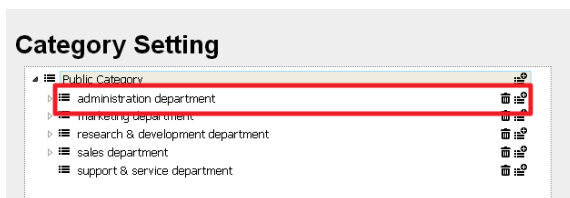
2.2.1 Add Category

1. Click  on the right side of [Public Category], the system will open the add category window.



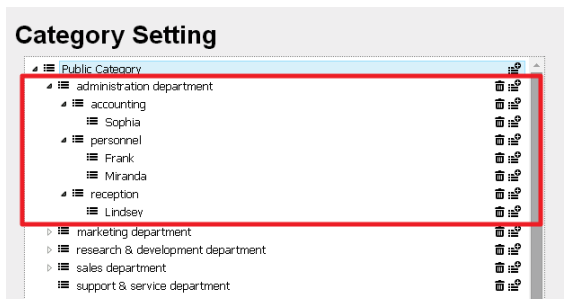
The 'Add Category' dialog box has a title bar with a close button. It contains a text field labeled 'Category Name' with the value 'administration department'. At the bottom right are 'OK' and 'Cancel' buttons.

2. Type in the category name and click [OK], you can see the newly added category in the category list.



Tip:

1. If you want to edit the category, please double-click the category name to open the edit category window.
2. Click  on the right side of the category, you can add sub-category for it.



2.2.2 Delete Category

Click  on the right side of the category, and then click [OK] in the delete category window. The category will be deleted from the list.

Note: You have to clear all the sub-categories and contacts in the category before deleting it.

2.3 Permission Setting

Choose [Permission Setting] in the setting menu to enter the permission setting page and in here you can edit all users' permission. If you want to return to Home Page, please click .

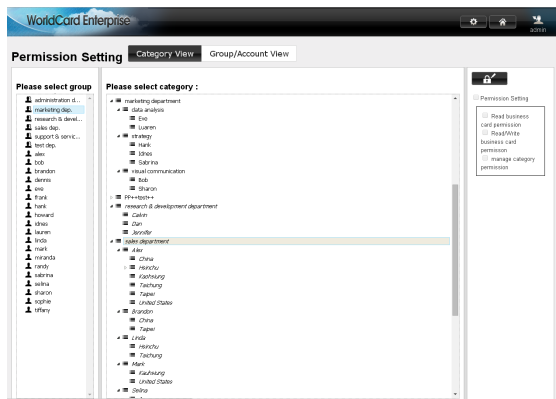
2.3.1 View Mode

While setting the users' permission, you can choose to view with [Category View] or [Group/Account View] interface. You can switch the interface by clicking the [Category View] or [Group/Account View] tab button.

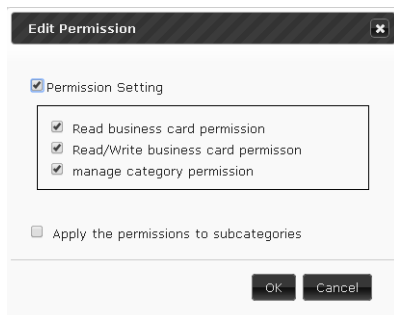
- Category View: View and set user permission with category list.



- Group/Account View: View and set user permission with group/account list.



2.3.2 Permission Introduction



Click  in the permission setting page to open the edit permission window. You have to check [Permission Setting] so as to check the following options:

- Read business card permission: Allow to read cards' information.
- Read/Write business card permission: Allow to add and update cards' information.
- Manage category permission: Allow to manage cards' categories.

Tip: If you check [Apply the permissions to subcategory], the system will apply the permission setting you made for the category to its sub-categories.

2.3.3 Edit Permission

• Category View

1. Select a category in the category list.
2. Click  and check the account or group you want to edit.
3. After selecting the account or group, click .
4. Edit permission setting for the account or group and click [OK].

• Group/Account View

1. Select an account or a group in the list and select a category in the list.
2. Click  to edit permission setting for the account or group, and then click [OK].
3. When the color of the category name turns from gray to black, this means the selected account or group have the permission in this category.

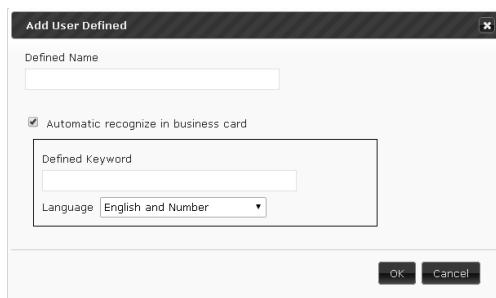
2.4 Summary Information

This page shows current accounts quantity, saved business card quantity and usage of hard drives and etc...

WorldCard Enterprise	
Summary Information	
WorldCard Enterprise License Status:	
License expiration:	11/10/2014 12:00:00 AM - 2/28/2015 11:59:59 PM
Number of Account:	100
Account information:	
Activated accounts:	61
Non-activated accounts	0
Category information:	
Category amount:	105
The amount added within a week:	5
The amount added within a month:	65
Contacts:	
Contacts amount: contact amount:	986
The amount added within a week:	3
The amount added within a month:	587
The amount of contacts in the recycle bin:	2328
Storage:	
Used storage:	251.94 MB

2.5 User Defined Field

WorldCard Cloud provides 16 sets of user defined field for you to add so users can have extra fields to contain more detailed cards information. Choose [User Defined Field] in the setting menu to enter the user defined field page. Click , you can add new field. If you want to edit the field information, click  to open the edit field window. Moreover, to delete the field, please click  on the right side of the field.



The image shows a dialog box titled "Add User Defined". It contains the following fields and controls:

- A text input field labeled "Defined Name".
- A checked checkbox labeled "Automatic recognize in business card".
- A text input field labeled "Defined Keyword".
- A dropdown menu labeled "Language" with the current selection "English and Number".
- "OK" and "Cancel" buttons at the bottom right.

- [Defined Name]: The defined name will be shown on the field interface.
- [Automatic recognize in business card]: The system will base on the defined keyword to recognize business cards and enter the recognized result in the defined field.
- [Defined keyword]: The system will use defined keywords to recognize business cards.
- [Language]: There are two choices: "English and Numbers" and "Chinese,Japanese,Korean."

Tip: When you edit the defined field, users will see the edited result untill they log in to the system next time.

2.6 System Record

System Record

Retention Time of System Record: 30 days

Search:

Input Account:

Select Action:

Select Time:

*Default Time:

Custom Time: to

Time	Account (revolver)	Action	Card Category (Source)	Card Category (Destination)	Success	Result	Note
6/30/2014 9:41:34 AM	admin	Log in			Success	Success to log in.	
6/30/2014 9:41:20 AM	bob	Log in			Success	Success to log in.	
6/30/2014 9:41:08 AM	Unknown Account	Log in			Fail	Failed to log in. No account name: eve	
6/30/2014 9:40:43 AM	mark	Log in			Success	Success to log in.	
6/30/2014 9:40:25 AM	alex	Log in			Success	Success to log in.	
6/30/2014 9:35:44 AM	admin	Log in			Success	Success to log in.	

Load 6 items in this page

Page 1 of 1

Choose [System Record] in the setting menu, you can search for all cards records, WorldCard Cloud provides:

- Search function: Search for the records by input account, time and action.
- Retention time of System Record: The system can retain the records for 30/60/90/180/365 days.

When you finish editing the search options and click [Search], the search result will be displayed in the lower form.

2.7 Card Recycle Bin

Card Recycle Bin

Restore Copy

	Modify	Full	Basic	Card	Name	Company	Office Tel	Email	Department	Job Title	Address	Office Fax	Mobile	Website
☐	6/30/2014	United	SEA				510080	rigs@penpower			中國廣州市荔湾区 620-8776207			www.penpower
☐	6/30/2014	United	St Zoey Allen		WorldTrade		(453) 539-0189	zoey@worldtrade	Overseas Sales Manager	2731 Glkwest	(453) 529-0191			www.worldtrade
☐	6/30/2014	United	St Paul Montard				(1160) 970-62	paal@worldcard	Technical Direct	Unit 7, 3671 Vél	(160) 970-66			
☐	6/30/2014	United	St Natalie Smith		Worldford Tech	(715) 598-8220	nysales@world	Sales Department	Sales Manager	5018 Homeyer	(715) 598-8221			www.worldcard
☐	6/30/2014	United	St John Dow			(510) 897-5600	sales@penpower		Sales Section	84520 Fremont	(510) 897-6006			www.penpower
☐	6/30/2014	United	St Ardo Keys		TESAN		+90(212) 45460	tesan@tesan.c			90(212) 454602			www.tesan.com
☐	6/27/2014	Uemy	990	廣南區大			模式金社7-25481-9-3731-4	info@uemy.com			971-672 3333 3333 144-0056 36481-9-3732-24			www.uemy.com

Selected 0 items from total 60 items in this page

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Choose [Card Recycle Bin] in the setting menu, you can enter the recycle bin page. The cards shown in here have all been deleted. Only the administrator can see and restore the deleted cards.

2.7.1 Restore Cards

Check the cards and click [Restore], the deleted cards will be restored to their initial public categories. If the public category had been deleted and doesn't exist anymore, in this case, when you click [Restore], the system will open a window for you to reselect the public category of the restored cards.

2.7.2 Clear Card

Click [Clear] and choose to clear the card information deleted for 1/3/6/9/12 months ago.

Note: The card information deleted within one month can't be cleared.

2.8 General Setting

Choose [General Settings] in the setting menu, you can edit the following setting:

- Client offline setting: This setting allows users to use WorldCard Cloud offline; however, the users have to be online when you log in to WorldCard Cloud for the first time. You can set after 1/2/3/4/5/6/7/8/9/10 days, if the user's account doesn't connect to the server, it can't be used offline.
- Client automatic update setting: You can set the time for updating card information. The option includes 1/5/10/20/30/40/50/60 minutes. Once the cards in [My Favorites] and [Public Contacts] have been edited, the system will update the results to these areas according to the time setting automatically.
- Reset to default: Click this button, all the settings on this page will be reset to the default setting.

2.9 Other Settings

If you choose [Account Info.] in the setting menu, you can change your password and e-mail address; choose [Language], you can set the language of the user interface. There are three options for you to choose: Traditional Chinese, Simplified Chinese and English.

Chapter 3 My Favorites

No matter change the categories of cards or edit contacts information, any changes in [My Favorites] will be updated to [Public Contacts] automatically for the users who have the permission to share with each other. You can also click  to update the information manually.

3.1 Edit Category List

Users can add, edit or delete category in [My Favorites].

3.1.1 Add Category

1. click  on top of the category list to open the add category window.
2. Enter the category name and click [OK], you can see the new category shown in the category list.

Note:

1. *Sub-category can't be added under the default category (e.g. All). If you want to add categories under [All], please click , choose [Category Settings] and add category in this page. For more instruction, please refer to chapter 2.2 [Category Settings].*
2. *In the same layer, the added category's name can't be the same with the existed one.*

3.1.2 Add Category

1. Select the category you want to edit from the category list.
2. Click  to open the edit category window.
3. Type in the category name and click [OK], the edited category will be shown in the list.

3.1.3 Delete Category

1. Select the category you want to delete from the category list.
2. Click , the system will ask if you are sure about the deletion.

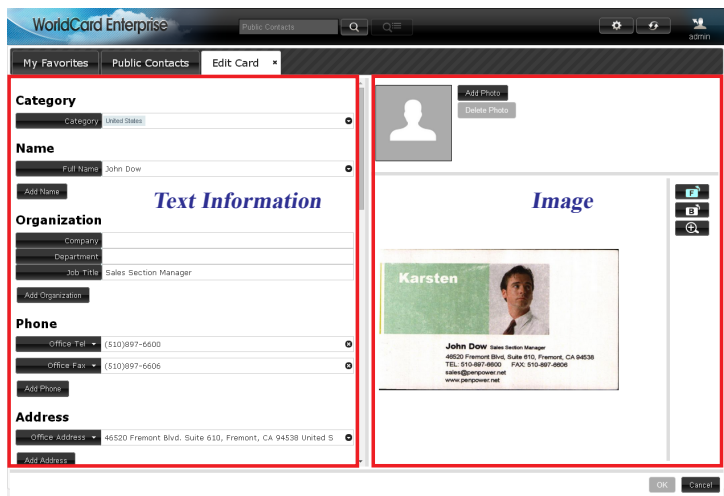
3. Click [OK], the selected category will be deleted from the list.

Note: Before deleting a category, you have to clear its sub-categories and contacts information first.

3.2 Edit Card Information

3.2.1 Card Editing Page

Users can add, edit, delete and categorize cards in the card editing area. When you click  (add card) or  (edit card), the system will open the card editing page, which can be sectioned into text information and image area.



In the text information area, click  beside the fields, you can select for more field options. Moreover, if you click category field or  beside it, you can categorize for the card; Click name/ address fields or  beside them, you can enter more detailed information of the contacts.

As for the image area, you can add photos or card images of the contacts. In the card editing area, you can:

- Click  /  to switch the front/ back of the card image.
- Click  /  to enlarge or shrink the card image.

3.2.2 Add Card

1. Select a category in the category list.

Tip: If you want to change card's category, click category field or  in the card editing page.

2. Click  to open a new card editing page.
3. After finishing the contact's text information, you can click  to add new card image or click  to add photo for the contact.

Tip: If you want to change the card image, click  again to select a new one.

4. When all the fields and images have been completed, click [OK], the added contact information will be shown in the contacts list.

3.2.3 Edit Card

1. Check the contact you want to edit from the contacts list.
2. Click  to open the card editing page.
3. When you're done with the contact's information, click [OK], the system will save the edited content.

3.2.4 Categorize Card

1. Check one or several contacts from the contacts list.
2. Click  and choose the category you want.
3. Click [OK], the selected contact can be found in the category you just chose.

3.2.5 Delete Card

1. Check one or several contacts from the contacts list and click .
2. Click [OK], the selected contact will be deleted.

3.3 Search Card

You can use keyword search function to search for the contacts. Enter the keywords of the contacts in the search bar and click , the system will show the search result.

The screenshot shows the 'WorldCard Enterprise' web application interface. At the top, there is a search bar with the text 'Natalie' and a magnifying glass icon. Below the search bar, there are tabs for 'My Favorites', 'Public Contacts', and 'Search Result'. The 'Search Result' tab is active, displaying a table with contact information. The table has columns for Card Info, Name, Company, Office Tel, Email, Department, Job Title, Address, Office Fax, Mobile, Website, and Public Catalog. A single row is visible for Natalie Smith, with details including her company (WorldCard Tec), phone numbers, email (nysales@worldcardtec.com), and website (www.worldcardtec.com). Below the table, there is a business card for WorldCard Technology Ltd., Sales Department, Sales Manager, Natalie Smith, with the same contact details as the table entry.

Card Info	Name	Company	Office Tel	Email	Department	Job Title	Address	Office Fax	Mobile	Website	Public Catalog
	Natalie Smith	WorldCard Tec	(716)598-8220	nysales@worldcardtec.com	Sales Department	Sales Manager	5010 Homeyer Rd, Niagara Falls, NY 14304	(716)598-8221		www.worldcardtec.com	United States

Page 1, selected: 1, total: 1

WorldCard Technology Ltd.
 Sales Department Sales Manager
Natalie Smith
 5010 Homeyer Rd, Niagara Falls, Niagara, NY 14304
 TEL: 716-598-8220 FAX: 716-598-8221
 nysales@worldcardtec.com
 http://www.worldcardtec.com

Chapter 4 Public Contacts

Any changes done in [Public Contacts] will be updated to [My Favorites] automatically. Users who have the category's permission can read and use those edited information. You can also click  to update the information manually.

4.1 Edit Category List

You can add, edit or delete category in [Public Category Mnage Area]. Additionally, you can add the category to the category shortcut area and [My Favorites] to save your time searching for categories' information.

4.1.1 Add Category

1. click  on top of the public category manage area to open the add category window.
2. Enter the category name and click [OK], you can see the new category shown in the public category manage area.

Note:

1. *Sub-category can't be added under the default category (e.g. All). If you want to add categories under [All], please click , choose [Category Settings] and add category in this page. For more instruction, please refer to chapter 2.2 [Category Settings].*
2. *In the same layer, the added category' name can't be the same with the existed one.*

4.1.2 Add Category

1. Select the category you want to edit from the public category manage area.
2. Click  to open the edit category window.
3. Type in the category name and click [OK], the edited category will be shown in the list.

4.1.3 Delete Category

1. Select the category you want to delete from the public category manage area.
2. Click , the system will ask if you are sure about the deletion.

3. Click [OK], the selected category will be deleted from the public category manage area.

Note: Before deleting a category, you have to clear its sub-categories and contacts information first.

4.1.4 Add to Category Shortcut

If you have great amount of categories, you can add the frequent-used one to the category shortcut. Next time, you can view its complete information in the public category manage area by clicking the category's name in the category shortcut area. The following is the instruction of adding category to the category shortcut area:

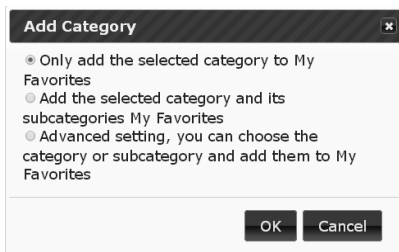
1. Select the category you want to add to the category shortcut area from the public category manage area.
2. Click  and click [OK], the added category will be shown in the category shortcut area.

Tip: If you want to remove the category from the category shortcut, please click ✕ beside the category name in the category shortcut area.

4.1.5 Add to My Favorites

You can add public category to [My Favorites] for the offline use or the quick access to the cards information. The following is the instruction of adding category to [My Favorites]:

1. Click ★ in front of the category name in the public category manage area. The system will open the window for you to choose to add the category or with its sub-category. You can also choose the advanced setting to select the category you want.



Note: If the ★ of the category you clicked is in the last layer, the system will automatically add it to [My Favorites].

2. When the star icon becomes , this means the category you selected have been added into [My Favorites].

Tip: If you want to remove the category from [My Favorites], click the star icon again to make it turns into .

4.2 Edit Card Information

4.2.1 Card Editing Page

The card editing page in [Public Contacts] is the same as in [My Favorite]. For more information about the editing page, please refer to chapter 3.2.1 [Card Editing Page].

4.2.2 Add Card

1. Select a category in the public category manage area.

Tip: If you want to change card's category, click category field or  in the card editing page.

2. Click  to open a new card editing page.
3. After finishing the contact's text information, you can click  to add new card image or click  to add photo for the contact.

Tip: If you want to change the card image, click  again to select a new one.

4. When all the fields and images have been completed, click [OK], the added contact information will be shown in the contacts list.

4.2.3 Edit Card

1. Check the contact you want to edit from the contacts list.
2. Click  to open the card editing page.
3. When you're done with the contact's information, click [OK], the system will save the edited content.

4.2.4 Categorize Card

1. Check one or several contacts from the contacts list.

2. Click  and choose the category you want.
3. Click [OK], the selected contact can be found in the category you just chose.

4.2.5 Copy Card to My Favorites

1. Check one or several contacts from the contacts list.
2. Click  and choose the category.
2. Click [OK], the copied contact will be categorized into the chosen category.

4.2.6 Delete Card

1. Check one or several contacts from the contacts list and click .
2. Click [OK], the selected contact will be deleted.

4.3 Search Card

You can use keyword search function to search for the contacts. Enter the keywords of the contacts in the search bar and click , the system will show the search result.

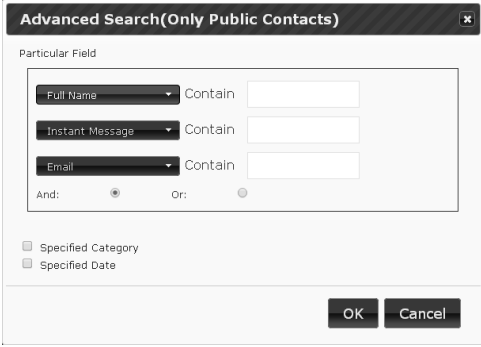


The screenshot displays the 'WorldCard Enterprise' application window. The 'Public Contacts' tab is active, showing a search result for 'John Dow'. Below the search bar, a table lists contact details. A detailed view of 'John Dow' is shown below the table, including his photo and contact information.

Card ID	Name	Company	Office Tel	Email	Department	Job Title	Address	Office Fax	Mobile	Website	Public Category
✓	John Dow		(510)897-6600	sales@penpow		Sales Section	146520 Fremont (510)897-6606			www.penpower/United States	
	John Dow	Karsten	(510)897-6600	sales@penpow		Sales Section	146520 Fremont (510)897-6606			www.penpower/United States	
	Robert Czenuck Bajtel		02-55492772	robert.czenucki		Authorised Dist. ul. Krolowej Ma	+48226518692 +48602214094			www.bajtel.pl	1700 聖數
	梁博	濟南宣美特島	+886-2-2500-1	fenar_dow@h	直致策新	資深經理	104 台灣台北博	+886-2-2500-1			我的聯絡人 (Gr

John Dow
Sales Section Manager
46520 Fremont Blvd, Suite 610, Fremont, CA 94538
TEL: 510-897-6600 FAX: 510-897-6606
sales@penpower.net
www.penpower.net

Furthermore, you can click  beside the search bar to set the advanced search requirement. In [Particular Field], you can choose from the fields option and type in the keywords. You can also check [Specified Category] and [Specified Date] to have more specific search for the contact.



The image shows a dialog box titled "Advanced Search(Only Public Contacts)" with a close button (X) in the top right corner. Below the title bar, the text "Particular Field" is displayed. The main area contains three rows of search criteria, each with a dropdown menu, a "Contain" label, and a text input field. The dropdown menus are currently set to "Full Name", "Instant Message", and "Email". Below these rows, there are two radio buttons: "And:" (which is selected) and "Or:". At the bottom left, there are two unchecked checkboxes: "Specified Category" and "Specified Date". At the bottom right, there are two buttons: "OK" and "Cancel".

Advanced Search(Only Public Contacts) X

Particular Field

Full Name Contain

Instant Message Contain

Email Contain

And: ☒ Or: ☐

☐ Specified Category

☐ Specified Date

OK Cancel

FAQ

1. While using WorldCard Enterprise with Firefox, why does the internet page has blurred images?

A: It's because that your computer have checked [Use hardware acceleration when available] in Firefox. Please open the page menu of Firefox, click [Options]/ [Advanced] and uncheck [Use hardware acceleration when available].

2. If the administrator move or delete the category, causing the user lacks with his or her root category and make the account become unavailable to use. How can I solve this situation?

A: The administration need to log in to WorldCard Enterprise and enter into the account setting page to reset the root category for the account.

3. When the users of iOS/ Android/ Windows log in to WorldCard Enterprise and can't add or update the information, why does the system show the lack of permission message ?

A: About the lack of permission problem, please switch to the permission setting page to check for the users' permission.

4. If the card information have been accidentally deleted, how to restore it?

A: The administrator has to enter the card recycle bin page, find the deleted card and restore it.

5. Why can't I use WorldCard Enterprise with IE browser in Windows XP?

A: WorldCard Enterprise only supports IE 9 version above, Safari, Chrome and Firefox.

6. How much capacity or data can be saved in WorldCard Enterprise database?

A: Please refer to MS SQL server capacity specification(<http://msdn.microsoft.com/zh-tw/library/ms143432.aspx>).

7. How many account can be used in WorldCard Enterprise?

A: The amount of the available accounts is based on how many account you purchased. If you need extra accounts, please contact PenPower Technology. (<http://www.penpower.com.tw/>).

Penpower WorldCard

User Manual

Manufacturer: Penpower Technology Ltd.

Version: v1.5.0 for Web

Release: December, 2014