

WorldCard Enterprise

User Manual

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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.

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Chapter 1 Getting Started

1.1 Log in

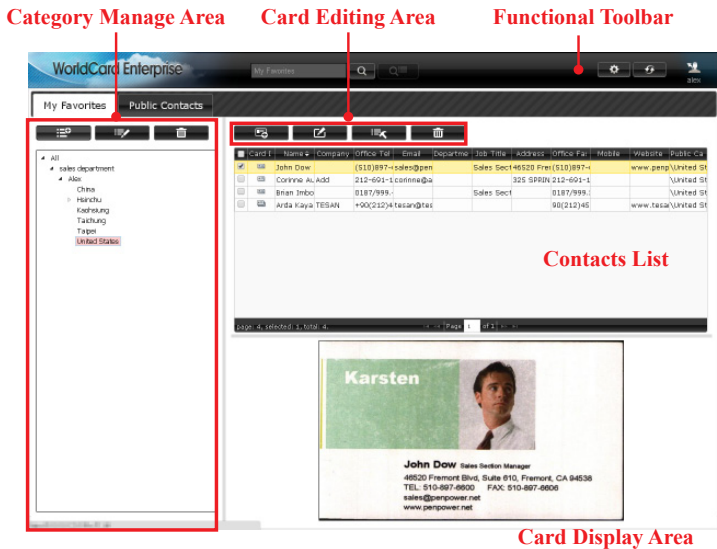
When you open the log in page of WorldCard Cloud, please choose [WCE Account] option and enter your account and password to have access into the server.



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:



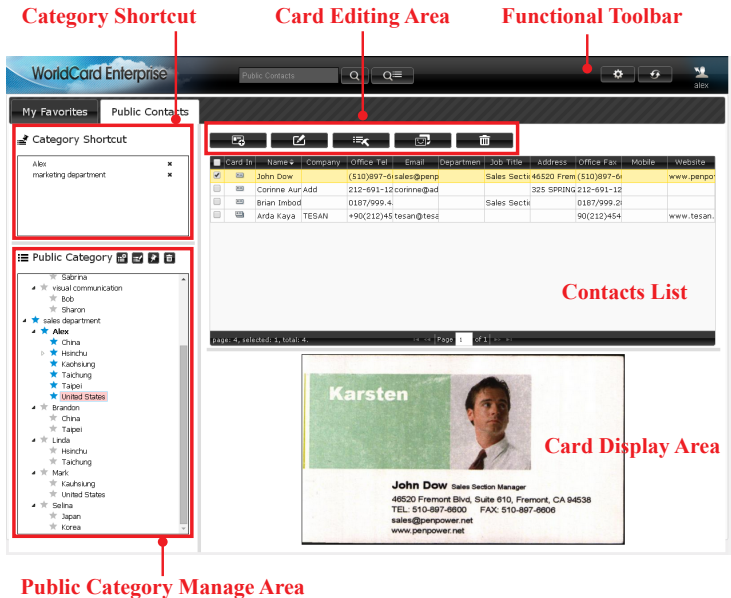
- Category Manage Area: Add/ edit/ delete/ view cards' category and switch between [My Favorites] and [Public Contacts] page.
- Card Editing Area: Add/ edit/ delete/ categorize business cards.
- Functional Toolbar: Search bar, setting button, refresh button and log out button.
- Contacts List: View Contacts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

No matter change the categories of cards or edit contacts information, all changes are made in [My Favorites]. The edited result 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.

2.1 Edit Category List

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

2.1.1 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).*
2. *In the same layer, the added category' name can't be the same with the existed one.*

2.1.2 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.

2.1.3 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.

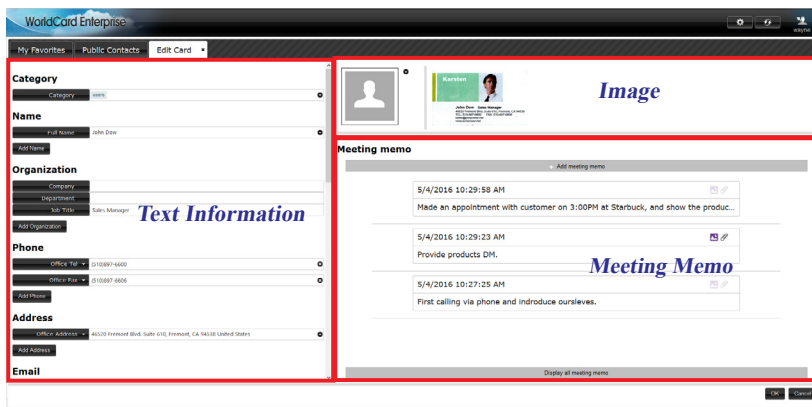
3. Click [OK], the selected category will be deleted from the list.

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

2.2 Edit Card Information

2.2.1 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.



The screenshot shows the 'WorldCard Enterprise' interface with the 'Edit Card' tab selected. The left sidebar, labeled 'Text Information', contains the following fields: Category (with a dropdown), Name (with 'First Name' and 'Last Name' sub-fields), Organization (with 'Company', 'Department', and 'Job Title' sub-fields), Phone (with 'Office' and 'Home' sub-fields), Address (with 'Office' and 'Add Address' sub-fields), and Email (with an 'Add Email' sub-field). The right main area, labeled 'Image', features a profile picture, a contact card for 'Karlsson', and a 'Meeting memo' section with a list of entries. Each entry includes a date and time, a description, and icons for adding or deleting the memo. A red border highlights the 'Text Information' sidebar, and a blue border highlights the 'Image' section on the right.

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 click on photo to enlarge. If the contacts has double sides image, you can click  to switch to the other image.

2.2.2 Meeting Memo

You can add and review the meeting records in [Meeting Memo] which helps you to record everything when you having contact with customers, and remind you every important things.

Please click **Edit** at the bottom, and click **+ Add meeting memo** to start adding meeting memos. Except texts, you can attach pictures and files to record more things.

2.2.3 Edit Meeting Memo

The history list will only display the latest three memos, if you want to review all, please click **Display all meeting memo** to expand.

When reviewing all records, you can click  to edit the meeting memo or click  to delete. Click [OK] to save after you modified.

2.2.4 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.

2.2.5 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.

2.2.6 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.

2.2.7 Copy to Public Categories

1. Select one or more contacts in the contact list, and click .
2. Click OK to select which category of yours that you want to copy to.
3. After that, you can see that contact in your category.

2.2.8 Delete Card

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

Chapter 3 Public Contacts

In [Public Contacts], if you have enough permission, you can view and use other users' card information. Once the information in [Public Contacts] have been changed, the system will updated it to [My Favorites] automatically. You can also click  at top right of the screen to update the information manually.

3.1 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:

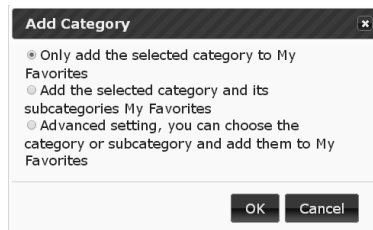
1. Select the category you want to add to the category shortcut area from the public category manage area.
2. Click  and click [OK], the added category will be shown in the category shortcut area.

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

3.2 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].

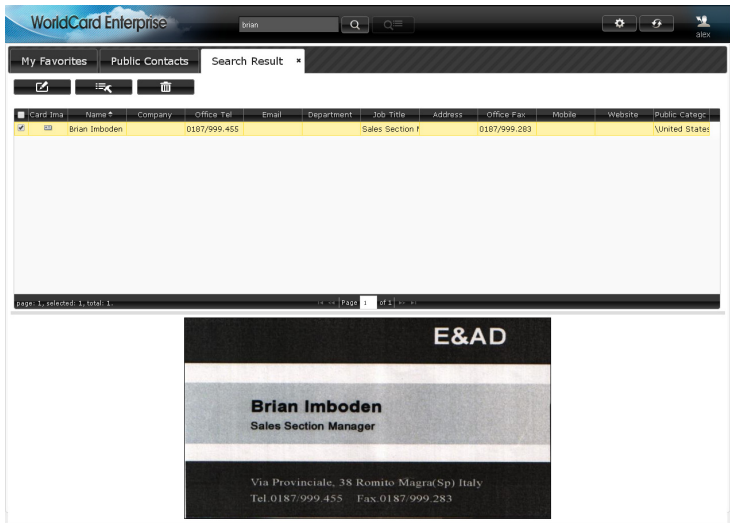
Tip: If you want to remove the category from [My Favorites], click the star icon again to make it turns into ★.

Chapter 4 Advanced Function

4.1 Search Card

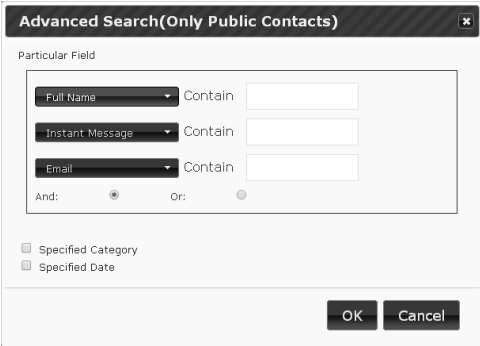
4.1.1 Direct Search

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.



4.1.2 Advanced Search

Furthermore, in [Public Contacts] 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 software dialog box titled "Advanced Search(Only Public Contacts)". It features a section labeled "Particular Field" containing three rows of search criteria. Each row has a dropdown menu (currently showing "Full Name", "Instant Message", and "Email" respectively), the word "Contain", and an empty text input field. Below these fields are two radio buttons labeled "And:" and "Or:". At the bottom left of the dialog are two checkboxes: "Specified Category" and "Specified Date", both of which are unchecked. At the bottom right are two buttons: "OK" and "Cancel".

4.2 Setting

Click  on the Functional Toolbar and open Setting's drop-down menu. you can select:

- [Account Info.]: Change account's password and e-mail.
- [Language]: Choose the language for the user interface. There are three languages for you to choose: Traditional Chinese, Simplified Chinese and English.
- [User Manual]: Open WorldCard Cloud User Manual.

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Manufacturer: PenPower Technology Ltd.

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