

WorldCard Enterprise User Manual

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Contents

Chapter 1 Getting Started.....	1-1
1.1 Installation.....	1 - 1
1.1.1 System Requirements	1 - 1
1.1.2 Software Installation.....	1 - 1
1.2 Launch WorldCard Enterprise.....	1 - 4
1.3 Log in to Server.....	1 - 4
Chapter 2 My Favorites.....	2-1
2.1 Add Contact.....	2 - 2
2.1.1 Scan Cards to Add Contacts	2 - 2
2.1.2 Add Contacts via the Scan Wizard	2 - 2
2.1.3 Add Contacts Manually	2 - 3
2.1.4 Add Contacts from the Same Company	2 - 3
2.1.5 Add Contacts from eSignature.....	2 - 3
2.2 Category Management	2 - 4
2.2.1 Add Category	2 - 4
2.2.2 Delete Category	2 - 4
2.2.3 Rename Category	2 - 5
2.2.4 Categorize Card	2 - 5
2.3 Update Cards to Public Contacts.....	2 - 6
Chapter 3 Public Contacts	3-1
3.1 View Card.....	3 - 1
3.1.1 Interface Introduction	3 - 1
3.1.2 Add to Category Shortcut	3 - 2
3.1.3 Add to My Favorites.....	3 - 3
3.2 Use Card.....	3 - 4
3.2.1 Copy Other Users' Contact Information	3 - 4
Chapter 4 Edit Contact	4-1
4.1 Editing Page	4 - 1
4.1.1 Contact List.....	4 - 2

4.1.2 Edit the Contact	4-2
4.1.3 Edit the Card Image	4-3
4.2 Deleting Contacts	4-5
Chapter 5 Use Contact Information.....	5-1
5.1 Send Email	5-1
5.2 Skype	5-1
5.3 Open Website and Display Map of Address	5-1
5.4 Route Planning	5-2
5.5 Search on Social Networks	5-2
5.6 Print Preview	5-2
5.7 Search Contacts	5-3
5.7.1 Quick Search	5-3
5.7.2 Advanced Search	5-3
Chapter 6 Advanced Function	6-1
6.1 Import	6-1
6.1.1 Import WorldCard Series Data Exchange file (.wexf)	6-1
6.1.2 CSV file (.csv)	6-1
1. Click [Management]/[Import]/[CSV Files (.csv)] and click [Next]	6-1
6.1.3 vCard file (.vcf) , image file(.jpeg)	6-1
1. Click [Management]/[Import]/[Image Files (.jpeg)] and click [Next]	6-1
6.2 Export	6-2
6.3 Settings	6-3
6.3.1 General	6-3
6.3.2 Scanning Option	6-3
6.3.3 Export	6-3
Appendix User Interface Introduction.....	a-1
1. User Interface Overview	a-1
2. Menu	a-2
3. Regular Toolbar	a-5
4. View Mode	a-5
5. Alphabet Index	a-7

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Chapter 1 Getting Started

1.1 Installation

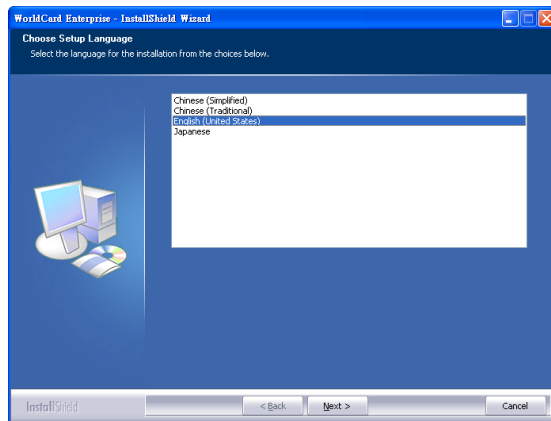
1.1.1 System Requirements

- Windows 8 Desktop/7/Vista/XP SP3

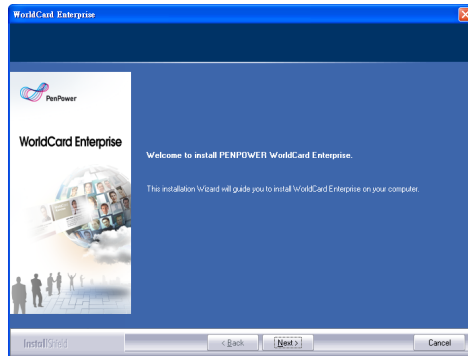
1.1.2 Software Installation

Insert the WorldCard CD-ROM into the disk drive, it will automatically execute the [Setup.exe] program and start to install the software.

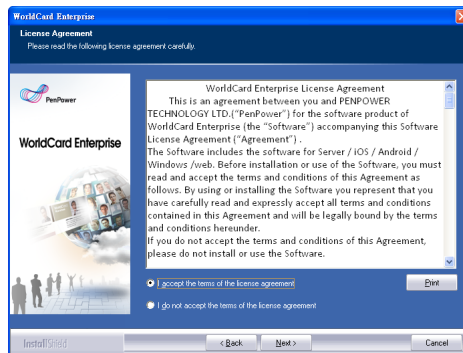
1. Select the language on the installation wizard screen and click [Next].



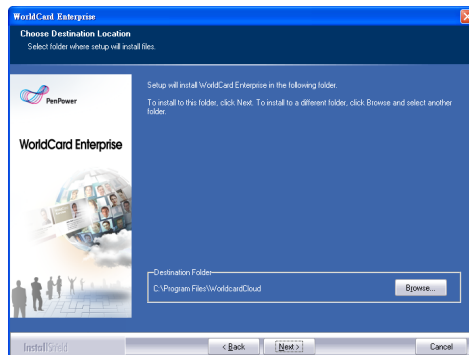
2. Click [Next] to continue.



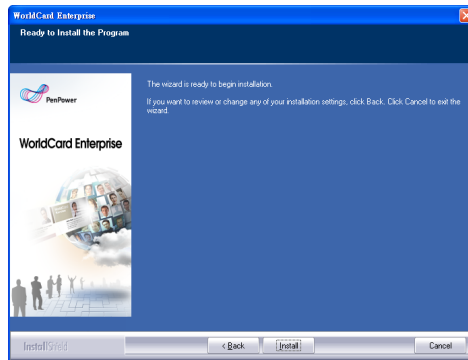
3. Please read the user license agreement carefully, click [I accept the terms of license agreement], then click [Next].



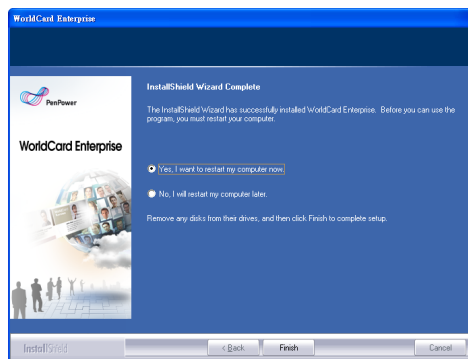
4. Select the default installation folder or click [Browse] to select other installation folder and click [Next].



5. Click [Install] to begin the installation. If you'd like to change the installation folder, please click [Back] to modify it.



6. After the installation, we suggest you to select [Yes, I want to restart my computer now] and click [Finish] to close the wizard.



7. After the computer restarts, it will continue to install [.NET Framework], the WorldCard essential component.

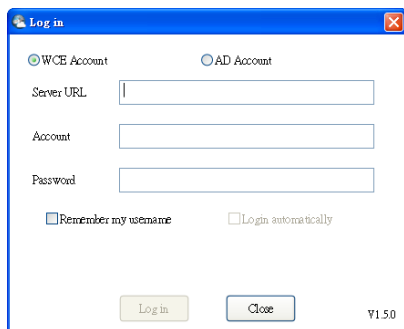
1.2 Launch WorldCard Enterprise

Execute [Start/All Programs/WorldCard Enterprise/WorldCard Enterprise] or just click [WorldCard Enterprise] shortcut  to launch the program.

1.3 Log in to Server

After opening WorldCard Enterprise login page, please enter Server URL, your account and password. When you log into the account successfully, you can start to use WorldCard Enterprise.

If you have multiple AD accounts, there will be an AD server list for you to choose.

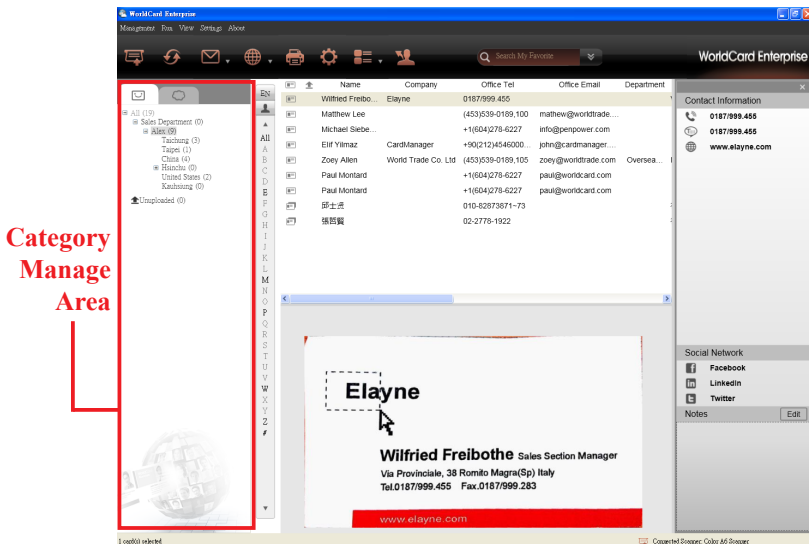


The image shows a 'Log in' dialog box with a blue title bar. It contains two radio buttons at the top: 'WCE Account' (selected) and 'AD Account'. Below these are three text input fields labeled 'Server URL', 'Account', and 'Password'. At the bottom, there are two checkboxes: 'Remember my username' and 'Login automatically'. At the very bottom are two buttons: 'Log in' and 'Close'. The version number 'V1.5.0' is displayed in the bottom right corner.

Tip: You can check [Remember my username] and [Remember my password] when you log in. The system will save the server URL and account information if the login is successfully done.

Chapter 2 My Favorites

WorldCard Enterprise provides [My Favorites] and [Public Contacts] interfaces in Category Manage Area for you to manage and share your business cards information efficiently.



[My Favorites] is the area for personal business cards management. In here, you can add and edit cards information, create personal category and update the information that have been changed in [My Favorites] to [Public Contacts].



2.1 Add Contact

2.1.1 Scan Cards to Add Contacts

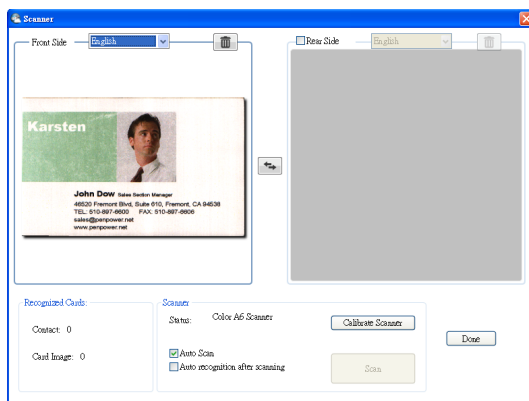
Please plug the USB cable of the scanner into the USB port on the computer. Put the card into the scanner with the text facing up, the light will continually blink during scanning. When the light stops blinking, you can proceed to scan the back of the card, or click [Skip Back] and continue to scan the next card.

Tip: Click [Settings]/[Scanning Option] to set the recognition language or other settings. For more information, please refer to chapter 6.3.2 [Scanning].

2.1.2 Add Contacts via the Scan Wizard

You can scan the card via the Scan Wizard. WorldCard Enterprise will recognize the text on the card and transform it into digital data.

Click  on the functional toolbar and select the front side recognition language of the card, if you'd like to scan the back of the card, please check [Rear Side] and select the back side recognition language of the card. Start to scan the front side and then the back side of the card. Click [Finish] and you will see the scanned contacts shown in the contact list.



Tips:

- 1. Auto Scan: When you open the scan wizard you can begin to scan the card immediately. If [Auto Scan] is unchecked, you need to trigger the scanner by clicking the [Scan] button.*
- 2. Auto recognition after scanning: It will automatically recognize the card after scanning. When [Auto recognition after scanning] is unchecked, you can review the image to see if it's clear or not. If it's unclear, you can scan again and then click [Finish], the application will recognize your card.*
- 3. If you don't like the card image, you can click  to delete it.*
- 4. You can click  in the middle to exchange the front side and the back side of the card.*
- 5. Execute [Run]/[Scan Wizard] or press Ctrl + n can also open Scan Wizard.*

2.1.3 Add Contacts Manually

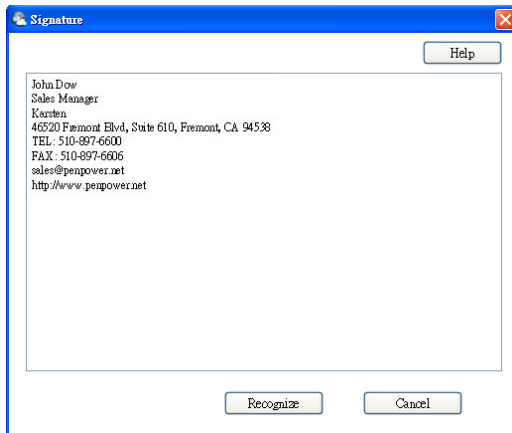
Click [Management]/[Contact]/[Add a Contact - Manually] from the menu to open a new editing page. Then, type the contacts information into the fields. How to edit the contact, please refer to chapter 4.1 [Editing Page].

2.1.4 Add Contacts from the Same Company

Select a contact in the contact list and execute [Management/Contact/Add a Contact - from the same company], the system will open a new editing page and automatically fill in the company name, address, phone number, fax number and website link, that is the same with the contact you selected. As for the contact's name, position, department, etc you need to fill in manually.

2.1.5 Add Contacts from eSignature

WorldCard Enterprise can recognize your eSignature in the email, click [Management]/[Contact]/[Add a Contact - eSignature] to open the signature dialogue window. Then copy the signature in the email and paste it in the text area of the window (shown as below). Click [Recognize] button and you can see the recognized contact information in the editing page.



Note: The system will update the added card information to [Public Contacts]. You can also update the information manually. For more detailed instruction, please chapter 2.3.

2.2 Category Management

2.2.1 Add Category

1. Execute [Management]/[Category]/[Add Category] or select a category name in Category Manage Area, right-click and select [Add Category].
2. Enter the category name in the category field. A new category will be added.

Note:

1. You can't add category under the default category(e.g. All)
2. The added category name can't be the same as the existed one.
3. You can click the plus icon in front of the category name to open its sub-category list or click the minus icon to close it.

2.2.2 Delete Category

Select the category in [My Favorites] and execute [Management]/[Category]/[Delete Category] or right-click and select [Delete Category].

2.2.3 Rename Category

Select the category in [My Favorites] and execute [Management]/[Category]/[Rename Category] or right-click and select [Rename].

2.2.4 Categorize Card

You can choose one of the following ways to categorize your cards:

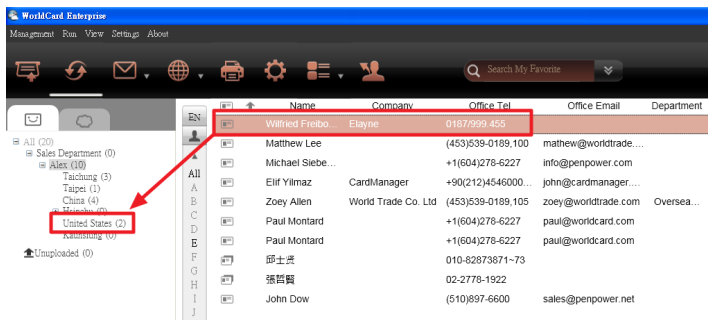
- Categorize in the category setting window
 1. Select one or several contacts in the contact list and execute [Management]/[Category]/[Setting Category] or right-click and select [Setting Category].
 2. When the category setting window opens, click the category you want to sort the contact.



3. Click [OK] and the contact will be sorted to the category you chose.

- Categorize by dragging the contact with the mouse

Select one or several contacts in the contact list and use the mouse to drag them to the category list. Release the mouse right on the category you want to sort the contacts. Then the selected contacts will be sorted to that category.



2.3 Update Cards to Public Contacts

After adding cards or editing the contacts information, you can wait for the system to update the edited information automatically, or click  on the functional toolbar manually. When the number of [Unuploaded] turns into 0 or the red spot disappears from the contact list, this means the information have been updated to [Public Contacts] successfully. If you have the permission of other users' categories, the system will update them to [My Favorite] as well.

Note: The system will update the latest information to [Public Contacts], based on the server's automatic update setting.

Chapter 3 Public Contacts

In addition to [My Favorites], WorldCard Cloud also provides [Public Contacts] in the category manage area for all users to use. This area is the database for all users to manage cards information. Every information added or edited in [My Favorites] will be upload to [Public Contacts]. You can share your cards information with other users or get the information they shared.

However, in [Public Contacts], the usage of the information is based on users' permission. If you have the permission of the category, then you can copy or download its contacts information to [My Favorites].

3.1 View Card

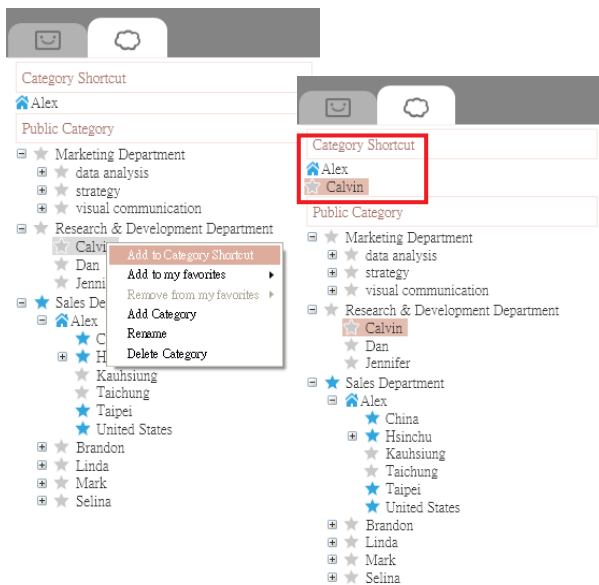
3.1.1 Interface Introduction



When you click  in Category Manage Area, you can switch [My Favorites] page to [Public Contacts] page. [Public Contacts] can be sectioned into two parts: [Category Shortcut] and [Public Category]. The categories display in the public category are the one that you have the permission to view. The  icon in the image above presents as your root category in the server. When the house or star icon turns into blue, this means the categories beside them have been added to [My Favorites].

3.1.2 Add to Category Shortcut

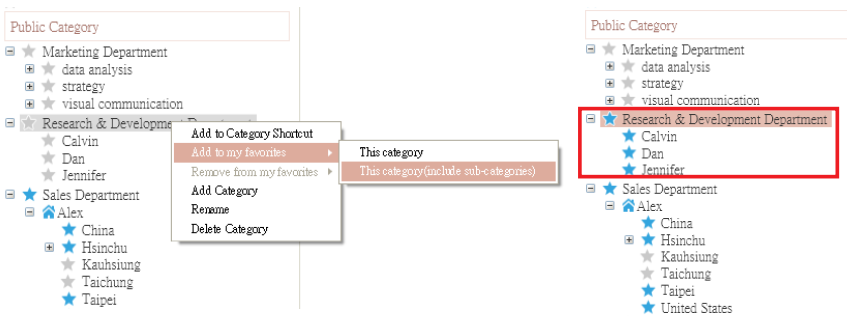
If you want to add the frequent-used category into the category shortcut area, please select the category in the category manage area, right-click it and choose [Add to Category Shortcut]. Then, the selected category will be shown in the shortcut area. If you want to cancel the shortcut setting, please select the category again, right click and choose [Delete from Category Shortcut].



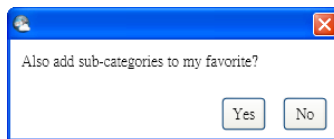
3.1.3 Add to My Favorites

You can download the contacts information in the public categories to [My Favorites] so that when the information in public categories have been edited, the system will automatically update the changes to [My Favorites]. The followings are the two ways to add public categories to [My Favorites]:

1. Select the category in [Public Category], right-click and choose [Add to My Favorites], and then you can choose [This category] or [This category(includes sub-categories)]. When the star icon beside the category name turns into blue, that category can be viewed in [My Favorites].



2. Click the gray star icon beside the category, the system will ask you whether to add its sub-categories. When the star icon beside the category name turns into blue, that category can be viewed in [My Favorites].



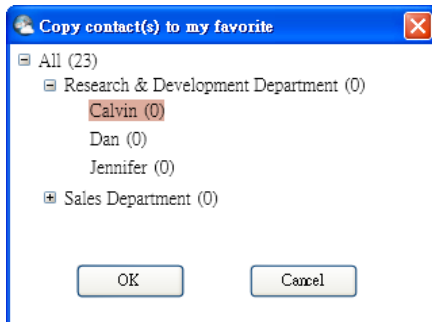
Note: If the category you click is the subcategory in the last layer, the system won't open the dialogue window above.

3.2 Use Card

3.2.1 Copy Other Users' Contact Information

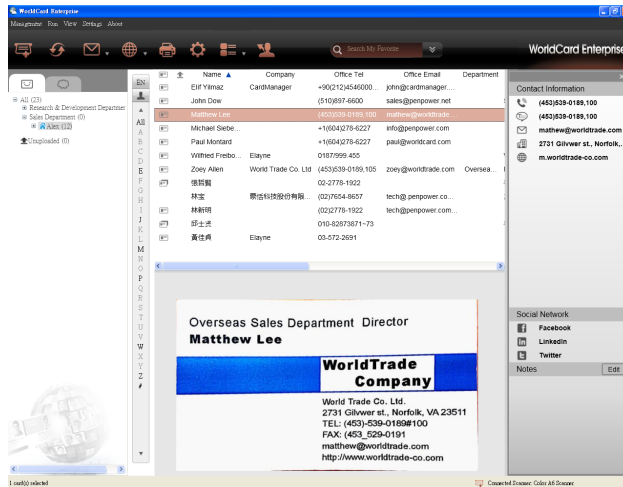
To copy other users' contacts information, please follow the instruction below:

1. Select a contact in the contact list, right-click and choose [Copy contact(s) to my favorites].
2. Click the category you want to sort for the contact in the opened window and click [OK].
Then, you can view the contact's information in the category of [My Favorites].



Chapter 4 Edit Contact

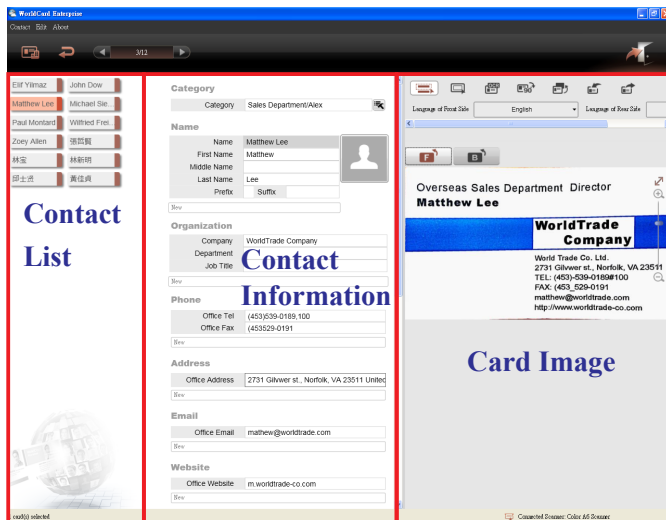
Whether in [My Favorites] or in [Public Contacts] with the editing permission, you can fill in more information or modify contacts' recognition result. If you'd like to edit contact information, please double-click a contact in the contacts list to open the edit page.



4.1 Editing Page

There are three areas in the editing page: [Contact list], [Information] and [Card Image]. Click  after modification to exit the editing page, the system will automatically save what you edited. If you'd like to undo what you edited, please click  or click [Edit]/[Restore].

Click [Contact]/[Add a Contact - Manually] to add a contact by yourself in the group. To add a contact who is in the same company with the contact you're editing, please click  or [Contact]/[Add a Contact - from the same company], the application will open a new page with the contact's company name, address, phone number automatically filled in.



4.1.1 Contact List

The contact list shows you every contacts in the same group to let you quickly switch and edit the contacts. Click [More] to expand the contact list. When you click another contact, it will automatically save the modified contact. If you'd like to restore the modified result, please click  before switching to another contact.

4.1.2 Edit the Contact

In the contact information area, you can modify any columns you want. If you'd like to modify another contact, just click the contact in the contact list. There are more functions listed below:

Add a Photo: Click the photo icon next to the name column. To change or delete the photo, click the photo again.

Name	
Name	John Dow
First Name	John
Middle Name	
Last Name	Dow
Prefix	Suffix



Change how the address displays: Click the drop-down menu of the address column to choose different format for address display.

Using the contact information: If there's an icon showing next to the column, you can click the icon to call or send the email to the contact. You can also link to the contact's website.

4.1.3 Edit the Card Image

If the contact has a card image, you can see it in the right down corner of the edit page. You can execute functions below:

Click  and  to view the front and back side of the card.

Click  to expand the card image, click  to zoom in and click  to zoom out the card image.

Click  to rotate the card image to 90 degrees.

Click  to exchange the front side and back side of the card image.

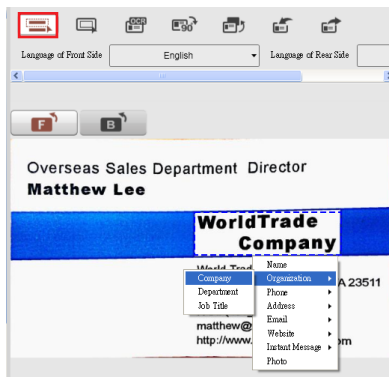
Click  to add image or scan business card.

Click  to save the card image.

For more functions, please refer the instruction below:

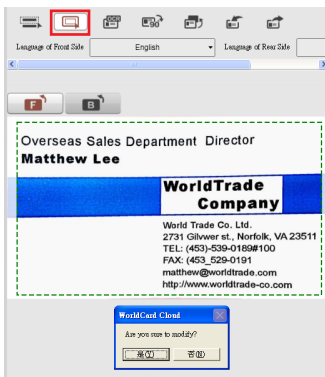
◎ Recognizing Partial Content of a Card Entry

In some cases, the information of the business card may not be completely recognized. You may use the Partially Select and Recognize function of the edit page to recognize the information again. First, click  and use the mouse to frame the specific area. Then, select the appropriate field from the list for the information which has been framed.



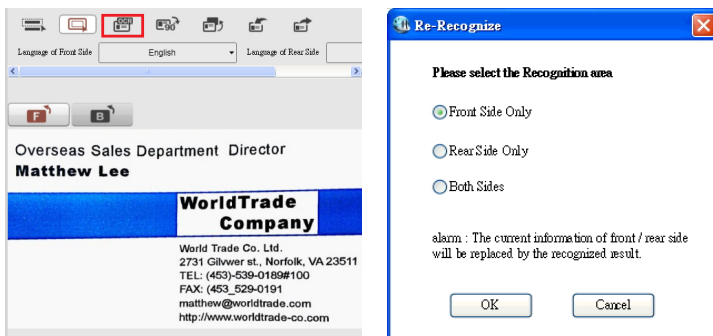
◉ Reframing Command

If you want to trim the margin of a business card, please click  and select the card area you want keep. The system will ask you if the modification is confirmed. Click [Yes] in the dialog window and the card image outside of the selection box will be cut off.



◉ Recognizing Again

Select the language(s) for the front and/or back side of the card. Then, click  or [Edit]/[Re-Recognize]. If the card is double-sided, check [Both Sides] to recognize each side and click [OK]. Note that the card information will be cleared when you recognize the card again.



Tip: If the business card is double sided, you can click  button to switch the front side and back side.

4.2 Deleting Contacts

If you want to delete the contact, Right-click on a contact in the contact list and then select [Delete]. The system will ask if you are sure about the deletion. Click [Yes], the selected contact will be removed from the contact list.

Once you delete the contact in [My Favorites], the information will be deleted permanently. However, if you delete it in [Public Contacts], you can still find the contact information in [My Favorites].

Chapter 5 Use Contact Information

5.1 Send Email

To send email to the contacts, right-click on the contact and select [Send email] or click [Run]/[Send email]; you can also click the e-mail button  on the functional toolbar. Then, select [To], [CC], [BOC] or [Attachment] as the mailing type. WordCard Cloud will open the e-mail software and fill the contact's e-mail information to the corresponded columns.

Tip: If you choose [Attachment] as the mailing type, the card images and text files of the selected contacts will be attached in the e-mail.

5.2 Skype

You need to install Skype software before using Skype function in WorldCard Cloud. Right-click on the contact who has a phone number and select [Skype] or click [Run]/[Skype] and then click . You can call the contact via mobiles or landlines and also send text message  to him or her. Click the phone number in the action area can contact people via Skype as well.

To use the Skype out function, you need to get the Skype credits. When make a call to overseas, if the phone number doesn't contain its country code, you need to modify the information by selecting the country in the drop-down menu of the Skype window.

5.3 Open Website and Display Map of Address

If there is any URL in the contact information, you can right-click on the contact and select [Open Website] or click  button on the functional toolbar to open this website. You can also click  in the action area. Moreover, right-click on a contact and select [Display Map of Address] or click  button on the functional toolbar, you can view the address information for the selected contact with Google Map. Click  in the action area can execute the same function.

5.4 Route Planning

WorldCard Cloud's [Route Planning] function allows you to query the route planning of contacts' address via Google Map .

1. Select one or several contacts, right-click and select [Route Planning]
2. Select the specific contacts' address or click [Select All] and then click [Next]. You can also edit [My address] and add it into your route planning.

Tip: The system will automatically save the address you typed in [My Address]. Next time, you will only need to open the drop-down menu and select the address.

3. You will see the route planning window, please make sure of the area, starting location and destination before clicking [OK]. You can use [Move Up] and [Move Down] button on the top right screen to change the order of the address.

Tip: You can click [Previous] to reselect the address in your route planning.

4. WorldCard Cloud will open the default browser and show you the route planning result with Google Map.

5.5 Search on Social Networks

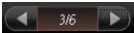
Select a contact, right-click and choose [Social Networking] or click [Run]/[Social Networking] to search for the selected contact on [Facebook], [Twitter] or [LinkedIn]. The system will use the contact's names and email addresses as keywords to search.

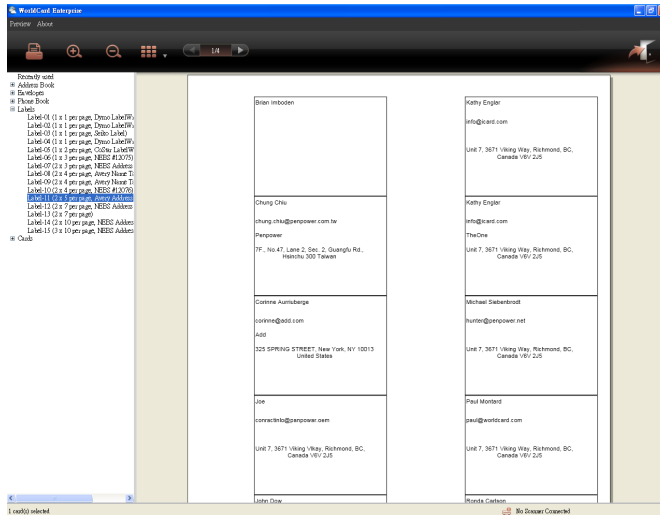
Tip: You can click the option from [Social Network] section in the action area to search from Facebook, Twitter or LinkedIn.

5.6 Print Preview

You can print out the contact information in many formats depending on your requests, like envelopes, labels and cards.

- Click  and  to zoom in and zoom out.
- Click  [Selected cards] or  [All cards in the preview area] to select the printing range.

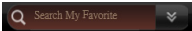
- Click  to print the contact information.
- Click  to close the print preview page.
- Click the arrow icon on  to switch the preview pages.



Note: You can't use print preview function in [Public Contacts].

5.7 Search Contacts

5.7.1 Quick Search

You can type the keywords in the search bar  on the functional toolbar to quickly search for contacts. Click  of the search bar to close the searching results.

5.7.2 Advanced Search

Click  or [Run]/[Advanced Search] and set the search conditions. To find the specific contacts, set the search field options and type the keywords in the fields, you can also search the contacts by setting [Category] or [Timestamp].

Chapter 6 Advanced Function

6.1 Import

6.1.1 Import WorldCard Series Data Exchange file (.wxf)

WorldCard Cloud supports WorldCard data exchange file (*.wxf) so that you can use import function to add contacts into WorldCard Cloud for management. The followings are the instruction of importing WorldCard data exchange file (*.wxf):

1. Click [Management]/[Import WorldCard data exchange file (.wxf)].
2. Select the wxf file you need and click [Open]. The system will open the import window. If you need to reselect the file, please click [Browse].

Note: if you check [Keep original category], the system will import the initial category of the contact to WorldCard Cloud.

3. If the imported file is correct, you can click [OK] to start the import process. When the process is finished, you can see the imported contact sorted in the default category [All] of [My Favorites] page.

6.1.2 CSV file (.csv)

1. Click [Management]/[Import]/[CSV Files (.csv)] and click [Next].
2. Select the csv file you want to use, you will see a line with [Ignore] in the middle, you can drop down the list to set the properties you want with the columns, and click [OK] to start using the imported contacts.

6.1.3 vCard file (.vcf) , image file(.jpeg)

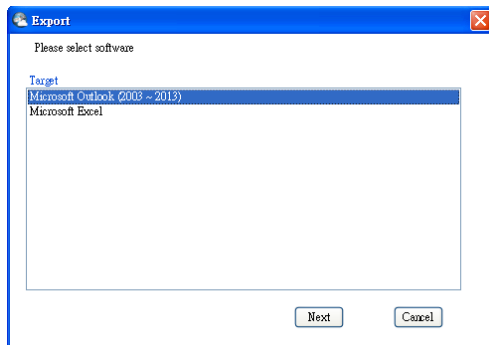
1. Click [Management]/[Import]/[Image Files (.jpeg)] and click [Next].
2. Select the image file you want to use and start to import, then you can start to use the imported contacts.

Note: The import format of vCard are vCard v2.1/3.0.

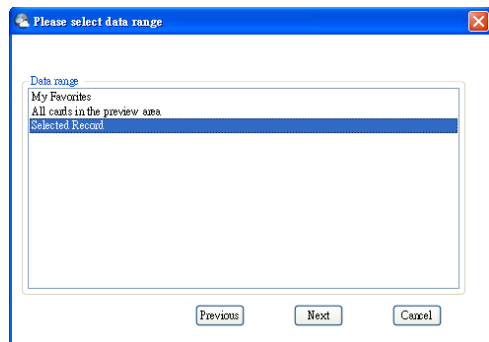
6.2 Export

You can select different range of WorldCard Cloud contacts information and export them as Microsoft Outlook or Microsoft Excel format files. The export steps are listed below:

1. Click [Mnagement]/[Export] and choose the export format you need.



2. Select the exported data range. Choose [My Favorites], then all the information in [My Favorites] will be exported; choose [All cards in the preview area], the information in the preview list will all be exported; choose [Selected Record] to export the selected contact's information.



3. If you select [Microsoft Outlook] as the export format, please click [Browse] to choose the directory path. When the export process is complete, you can see the exported contact in the directory of [Microsoft Outlook]. If you select [Microsoft Excel], when the export process is successfully done, the system will automatically open Microsoft Excel, and you can see exported contact in the workbook.

Note: Before exporting the information, you can refer to chapter 6.3.3 [Export] to edit the export settings first and then conduct the export process.

6.3 Settings

In the setting page, you can edit the display page and fields, scan and export settings. Click [Settings] in the menu to choose the option you want to edit, or click  button on the regular toolbar to open the setting page.

Tip: You can click [ctrl] + [o] to open the setting page.

6.3.1 General

Address Display: Zip code and country information display.

Font Size: Adjust the arrow to set the font size of the screen.

Display card images on the main screen: Check this option, card images will display with the contact information on the main screen.

Display Map of Address: You can set the Google map or Baidu map as default.

Send Email: It allows you to send email by Lotus Notes format.

6.3.2 Scanning Option

This section offers the settings for card style, recognition language, Chinese output character, name capitalization.

6.3.3 Export

You can refer to the following instruction to set export functions of Microsoft Outlook and Microsoft Excel. Click [Apply] to save the modified settings. Click [OK] to save and close the setting window.

- Microsoft Outlook

Export Contacts with Card Images: Check this option, then you can view the card images of the contacts in Microsoft Outlook.

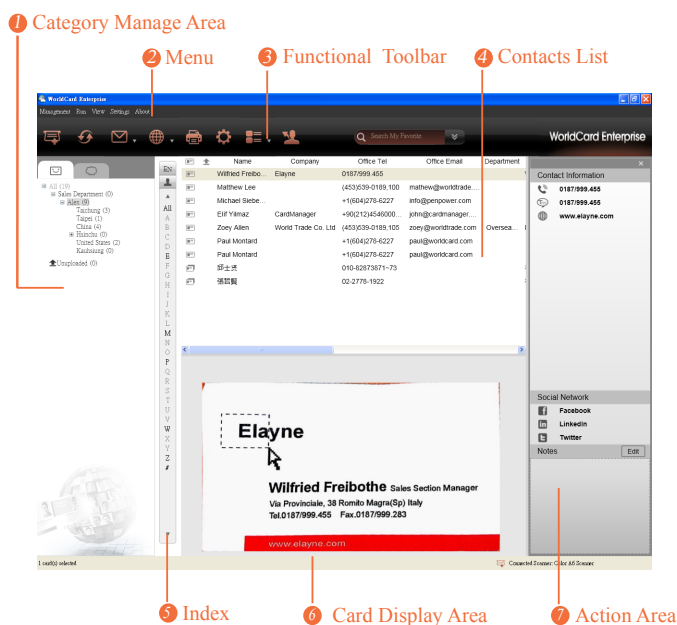
- Microsoft Excel

Export: Check the columns you'd like to display from [Available Fields]. Click the item in [Displayed Field], you can click [Move Up] and [Move Down] to arrange the display order. Click [Remove] to remove the displayed column. Click [Default] to restore to the original settings.

Appendix User Interface Introduction

WorldCard Cloud provides [My Favorites] which allows you to add/ delete/ categorize contacts and use their information to send emails, open website, search for address, search contacts information, import and export contact information, etc. Moreover, you can share your contacts with other users and view their cards information in [Public Contacts] to enlarge your contact network immediately.

1. User Interface Overview



1	Category Manage Area	In the category manage area, you can view edit contacts and category and categorize for the cards in [My Favorites] and [Public Contacts] if you have the permission.
2	Menu	You can find all the functions you'd like to execute in the menu.
3	Functional Toolbar	Provides frequent-used functions, such as scan, update, send Email, open website, find address on maps, print preview, settings, view mode, search bar and log out of WorldCard Cloud.
4	Contacts List	View contact information or click any contact to edit. Refer to 4.1.

5	Index	Click EN button to set the index as 注(Chinese ZhuYin), 拼(Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), ㄅ(Japanese Phonetic), or 한(Korean Phonetic).
6	Card Display Area	Show the business card image if there is any.
7	Action Area	Use quick functions like Email, Skype and social media to contact directly.

2. Menu

There are seven main menus, appearing at the top of the screen: [Management], [Run], [View], [Settings], and [Help].

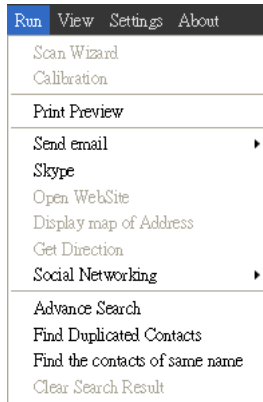


① Management



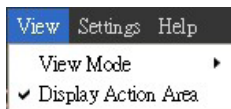
Contact	Add contacts via [Manually], [from the same company] or [eSignature]. You can also delete contacts or set the category for the contact.
Categories	Add, delete and rename categories.
Change login password	Change the login password of WorldCard Cloud.
Import	Import [WorldCard Data Exchange File(.wcf)]/vCard/CSV/Image Files into WorldCard Cloud to manage contacts.
Export	Export [Microsoft Outlook] and [Microsoft Excel] from WorldCard Cloud contacts.
Close	Close WorldCard Cloud.

• Run



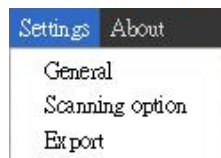
Scan Wizard	Execute scan wizard to scan the card image into WorldCard.
Calibration	Calibrate the scanner to eliminate unclear image or inaccurate color
Print Preview	Preview the printing contact in different document formats.
Send email	Send email, carbon copy, blind carbon copy to the selected contact, or attach the contact information as a file in Email.
Skype	Call or send message to contacts via Skype.
Open Website	Open the website on contact information.
Display map of Address	Display location of the contact via Google Map or Baidu Map.
Get Direction	Planning the route via Google Map.
Social Network	Search contacts on the social networks: Facebook, LinkedIn, Twitter.
Advanced Search	Search contacts in specific columns, categories or time-stamps.
Find Duplicate Contacts	Find the duplicate data by Name, Company, Email, Single/Double side.
Find the contacts of same name	Find the data of same name.
Clear Search Result	Clear the search results.

⦿ View



View Mode	Select to view your contacts with List mode or Card Image mode.
Display Action Area	If you'd like to hide the action area, just uncheck it.

⦿ Settings



General	Set the way of address display, font size and card image display.
Scanning Option	Card Style, recognition language, Chinese output characters, name capitalization.
Export	Set related information for exporting information.

⦿ About



User Manual	Refer to the user manual.
About	See more information about WorldCard.
Quick Guide	Quick way to know WorldCard Cloud user interfaces and functions.

3. Regular Toolbar



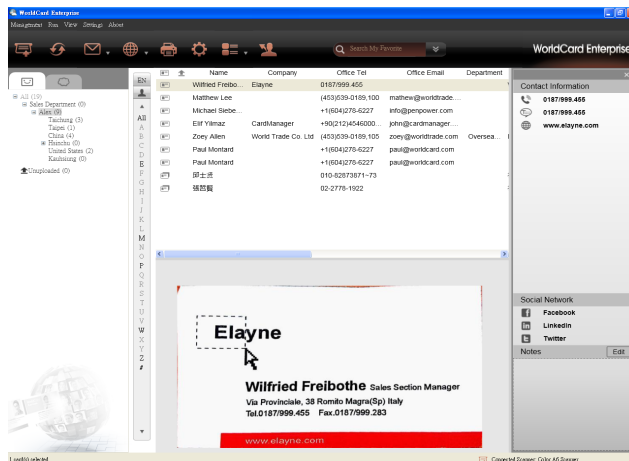
1	Scan Wizard	Scan the cards into WorldCard Cloud, refer to 2.1.2.
2	Update	Update cards information in [My Favorites] to [Public Contacts].
3	Send Email	Send Emails to contacts, WorldCard will open the default Email software and fill in the address or attach the contact information as a file for you, refer to 5.1.
4	Other functions	Using contact information, such as view the location of the contact's address and route planning, refer to 5.3 and 5.4.
5	Print Preview	Preview the contacts printing in different document formats, refer to 5.6.
6	Settings	Display, scanner and export settings, refer to 6.3.
7	View mode	View contact information in the list mode or card image mode.
8	Log out	Log out of WorldCard Cloud.
9	Search contacts	Type keywords in the search field to find the contact, refer to 4.3.

4. View Mode

There are two view modes: List Mode  and Card Image Mode . Right-click on a contact to select functions like Print Preview, Edit, Setting Category, Select all, Delete, Send email, Display map of address, Get direction, Open WebSite, Social Networking, etc.

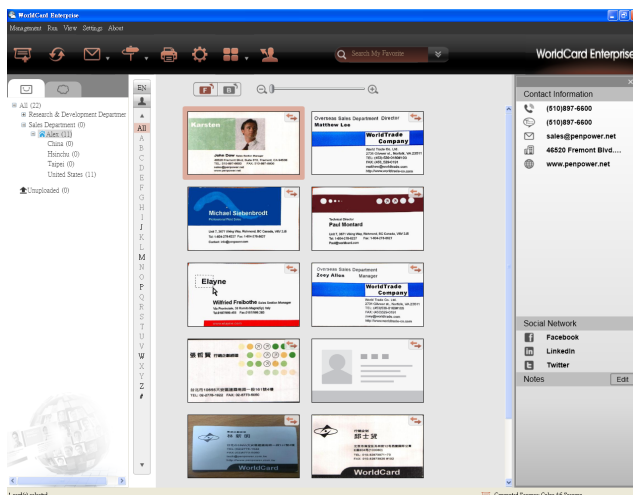
⦿ List Mode

List mode  is the default view mode, the contact information displays in different columns; click the contact to edit the contact information. If the contact has a card image, it shows below the contact list. Before the Name field, there's an icon to show you if the contact has one-sided  or double-sided card .



☉ Card Image Mode

In Card Image Mode , contacts display with card images. Click the image to edit contact information. Click  button to view the front sides of all business cards. Click the  button to view the back side of all business cards. Adjust the image size by moving the sliding bar. Click  to turn another side of the card.



5. Alphabet Index

There are different types of indexes can be used to manage your contacts. Click  button to set the index as 注 (Chinese ZhuYin), 拼 (Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), 日 (Japanese Phonetic), or 한글 (Korean Phonetic).

You can set the index sorted by **Name**  or **Company** . When Name  is selected, the contacts will be displayed by contacts name. When Company  is selected, the contacts will be displayed by company name. If the display name or company name of the contact cannot be sorted by the index, the contact will be put in the  group.

PenPower WorldCard Enterprise User Manual

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