

# **Penpower WorldCard Enterprise User Manual**

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# **Penpower Technology Ltd.**

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## Chapter 1 Product Feature

### \* **Advantages of the WorldCard Enterprise**

Reduce waste of internal resources through resource sharing and improve sales staff's customer management. By using WorldCard Enterprise for customer management, sales can avoid wasting time and resources on duplicate customers. The manager can also easily manage and stay up to date on employees' sales situation, number of customers and current progress. Simple to use and maintain, even a small-and-medium enterprise with no MIS staff can operate this system.

### \* **Integrated Online Database**

The business card data are stored on a MS SQL 2000 or MS SQL 2005 online database. This allows it to be shared within the enterprise or within departments or by multiple users.

### \* **MIS Administration Tools**

A comprehensive set of MIS administration tools provided so groups, user access and categories can all be easily managed.

### \* **User Access Management**

User access privileges can be set to Read Only or Full Control for ease of management.

### \* **Business Card Information Sharing**

Business card information can be sorted into categories and shared among multiple people.

### \* **Reduce Costs with Multi-User License**

Software/Hardware can be shared among multiple users to reduce costs.

### \* **Unicode Standard**

All new design based on the Unicode standard. Business card information in different languages can now be displayed simultaneously.

### \* **Multiple Language Business Card Recognition and Display**

Accurately recognize business cards in languages such as English, French, German, Italian, Spanish, Dutch, Swedish, Norwegian, Russian, Polish, Turkish, Hungarian, Traditional Chinese, Simplified Chinese, Japanese and Korean. Business cards in a different language on the opposite side can be handled as well.

**\* Business Card Management**

Complete set of management functions provided for business cards such as editing of information, assigning multiple categories, setting up nested categories and also the adding of individual information and photos during editing.

**\* Card Reader**

Business cards can be scanned quickly through the card reader and uploaded without going through the complications of a normal scanner.

**\* Other Image Sources Supported**

Business card picture files from digital cameras or high-grade camera phones can be used as image sources for business card recognition. Multiple business cards can also be scanned and recognized simultaneously from a flatbed scanner.

**\* Data Transfer**

Business card information can be imported and exported to Outlook, Outlook Express, Palm, Pocket PC, Lotus Notes and other PIMs.

**\* Business Card Search**

Full text search functions help users quickly find the business card information they need.

**\* Business Card Printing**

A wide variety of printing templates provided. Users can also compile their own printing templates so business card information can be easily printed into labels, envelopes, writing paper or memos.

## Chapter 2 Getting Started

### 2.1 System Requirements

- Pentium III 800 CPU or above
- 256MB of RAM
- 200 MB of available hard disk space
- Windows 2000 / XP/ Vista
- USB Port

### 2.2 Installing PENPOWER WorldCard

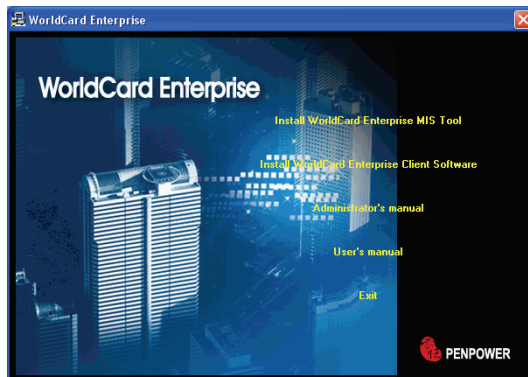
#### To properly use your WorldCard

1. Install the software included on the CD
2. Connect your WorldCard scanner to your PC
3. Scan your business cards and enjoy

#### 2.2.1 Software and Driver Installation

To save time, PENPOWER has combined the installation of the hardware and software into one easy process. To start, insert the CD into your CD/DVD ROM (if the program does not automatically start, simply double click the setup.exe file on the CD).

Click to select **Install WorldCard Enterprise Client Software**. Follow the instruction on screen and carry out the installation process as directed.







*Note: During the installation, there is one step ask you to input the path of the database parameter file (ppdbset.pni). You may ask the system manager for the path.*



At last step, if you do not want to restart now, click **No, I will restart my computer later**, and click **Finish** to complete installation.

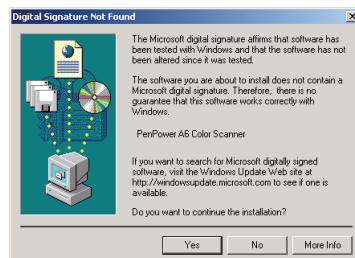
## 2.2.2 Connecting Hardware

After installing the software, connect the USB connection of your WorldCard scanner to the USB port of your computer.

*Note: Some computers may shut down accidentally after connection. This is due to lack of power to support several USB devices. To avoid this problem, connect your WorldCard scanner and other USB devices to an extra-powered USB hub.*

### Windows 2000

After connecting your device, the **Digital Signature Not Found** window will appear on you computer, please click **Yes** to complete the hardware installation of Card Scanner.

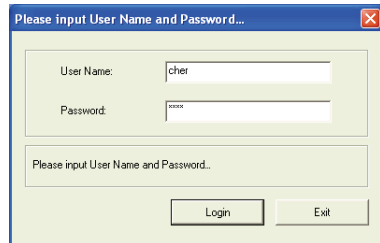


## 2.3 Preparation for Card Scan

### 2.3.1 Logon

After installing WorldCard Enterprise Client Software, its shortcut will display on the desktop. Double-click on it or click **Start\Program file\Penpower WorldCard Enterprise\WorldCard Enterprise** to launch **WorldCard Enterprise**.

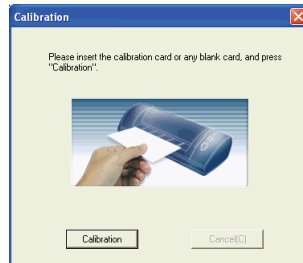
Please input the **User Name** and **Password** to login.



### 2.3.2 Calibration

After installing the software and drivers, your WorldCard scanner must be calibrated in order to ensure perfect results.

Place the calibration card into the scanner with the blank side face up. Make sure the calibration card is flushed to the side with the mark.





### 2.3.3 Start-Up Wizard

Start your WorldCard Enterprise by double-clicking the WorldCard icon on your Windows screen. After the WorldCard Enterprise opens, the following screen will appear.

1. To start the wizard, click <<Next>>.
2. The Wizard can help you quickly choose what you want to do:

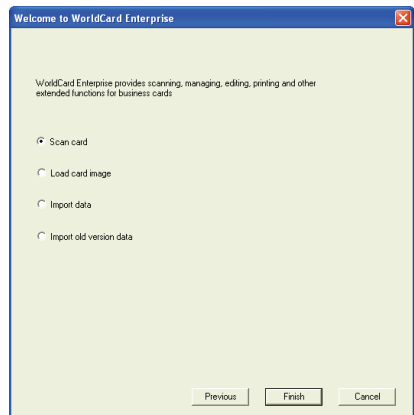
**Scan Card:** allows you to add a card to your file

**Load Card Image:** allows you to take an existing picture of a business card and add it to your file

**Import data:** allows you to import data from sources such as Outlook/Outlook Express/CSV and VCard etc.

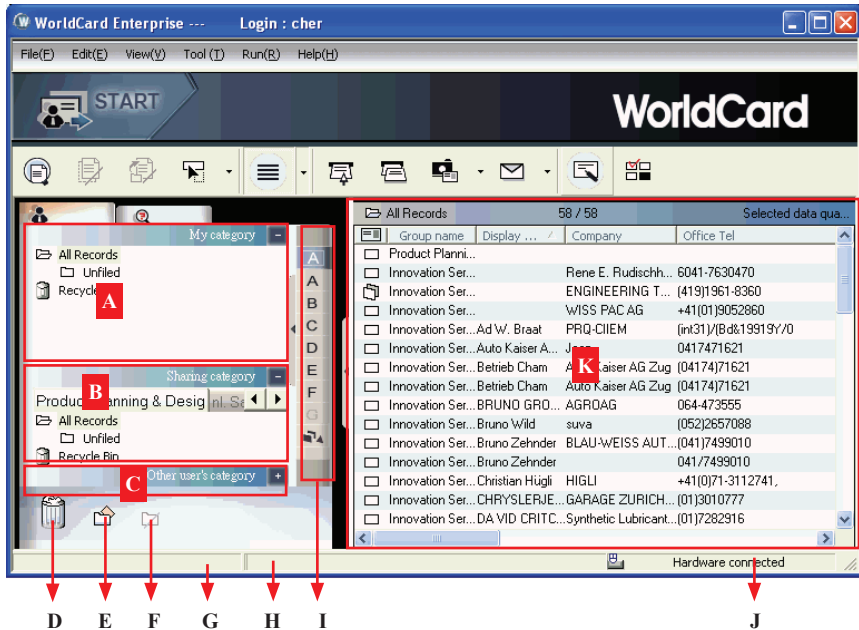
**Import Old Version Data:** allows you to import the previous version of WorldCard file into your new WorldCard Enterprise database

You may select a function and click the <<Finish>> icon to continue.



## Chapter 3 Overview

### 3.1 User Interface



A: My Category

B: Sharing Category

C: Other user's Category

D: Recycle Bin

E: Add Category

F: Delete Category

G: Disk space used

H: Status

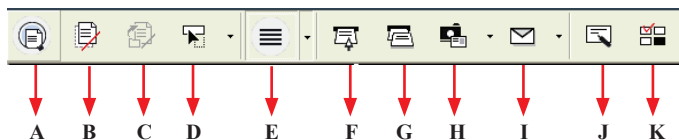
I: Alphabet

J: Connection Status

K: Card Window



## Menu Bar



A: Save your Card file

B: Delete Card

C: Delete card from Category

D: Settings

E: Mode button

F: Scan a new business card

G: Multiple scan business cards

H: Add a new card from another picture source

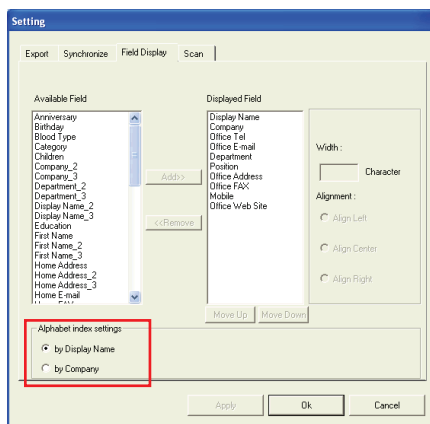
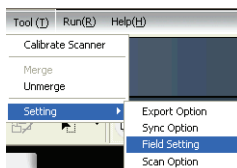
I: Send an email to selected person

J: Edit Card

K: Edit Print Template

## Alphabet

When the Alphabet index has contents, the index letter appears in black. The Alphabet index is indexed by Display Name and by Company. To select it, on the Tool menu point to Setting and click Field Setting. In the Alphabet Index settings area you can choose by **Display Name** and by **Company**.

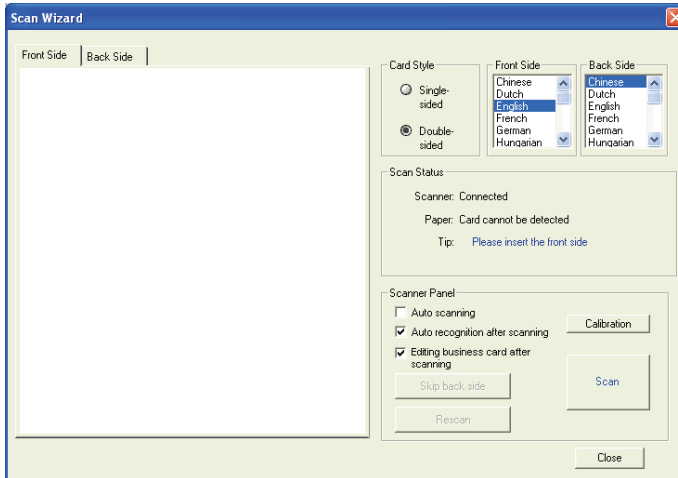


When select by Display Name, the contacts will be indexed by display name. When select by Company, the contacts will be indexed by company name. If the display name or company name is not English, the contact will be put in .

## 3.2 Scanning Wizard

### 3.2.1 Scanning Business Cards

To scan business cards, select **Scan** . The wizard will open:




1. Select if the card is single or double sided.
2. Select the language of the card, if the card is double-sided select the language of the both sides.
3. Insert the card into your WorldCard Scanner, placing the card flush with the edge with the symbol. Once inserted, the **Scanner status** frame should say **Ready**.
4. In the **Scanner Panel** frame:
  - Select **Auto Scanning**, if you want the scan to automatically start when the paper is inserted.
  - Select **Auto Recognition after scanning**, if you want the card information to be automatically added to your file. If you want to see the scanned card image before recognition, do not select this.
5. After you recognize the card, the information will automatically go into the **Unfiled** category.



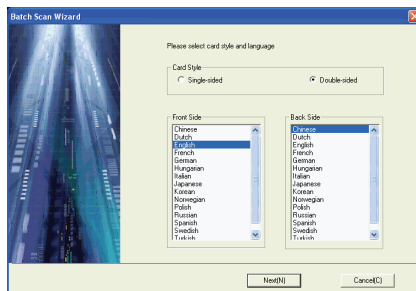
### 3.2.2 Batch Scanning

To batch scan business cards, select

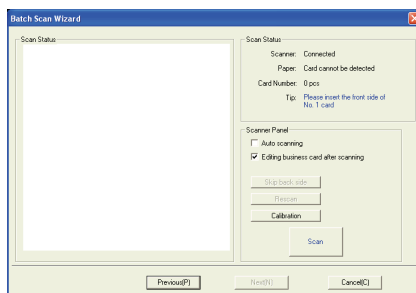
**Batch Scan** .

With this function, you can scan many cards easily, preview them, and then add them to your Card File.

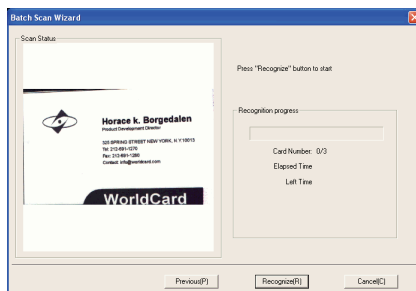
1. Select single or double-sided. Next, select the languages of each side. Please note, you can only multi-scan cards that are in the same language regardless of single or double sided.



2. The **Scan status** frame displays the status of the scanner. Select **Auto scanning** if you want to automatically feed in your cards. If the card does not scan properly, click on the **Rescan** to try again. If you want to return to the previous screen, select **Previous**.



3. This screen will allow you to quickly recognize all the cards scanned during this batch. When you are done, select **Finish**.



### 3.3 Scan Business Card Directly

To Scan your card directly, click  of the Setting icon  and select **Scan Option**.

Select Scan card directly of the Scan Method and click **OK**. You may refer to Chapter 5.9 for detailed setting explanation.

### 3.4 Category Management

#### \* My Category

Display all categories. Click on a category to see all the contacts under the category. After scanning a business card, the contact will display in **My category** and **Sharing category**. You may refer **5.1 Categorizing Cards** to manage the category.

#### \* Sharing Category

All the contacts from the same group display in **Sharing Category**. You may manage the category of sharing category, if you have full control authority.

#### \* Other user's category

If you have full control authority for other users, you will be able to view the category of other users.

You can manage your business cards by storing them in category groups. The Category tab is on the left side of the management window. You can find **All Records category** and **Unfiled category** as the default. WorldCard allows you to add as many user specified categories and sub-categories to manage your business cards as you chose.



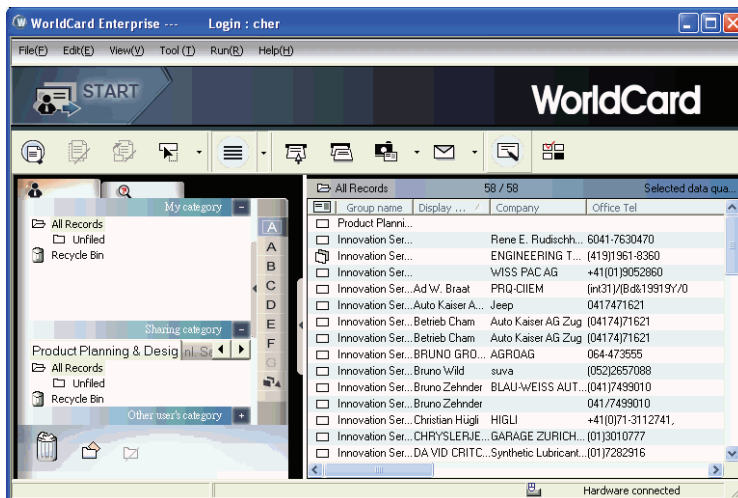


## 3.5 Viewing Contacts

WorldCard provides **List mode**, **Label mode**, **Image mode** and **Dual Mode**. The default setting is List mode. To select other modes, you may select **View/View Mode** or click the pull down menu of the **Mode** button from the menu bar.

### 3.5.1 List Mode View

**List Mode** is the default view mode.





### Contact Information List

After scanning business cards, you will see the scanned contact information list on the right side of the management window.

At the top of the window, you can quickly see how many cards are in each category. For easy organization, notice the dark-highlighted entries indicate cards that have not been edited or verified yet.




To sort the contact information into alphabetical order, you may click on the field name.

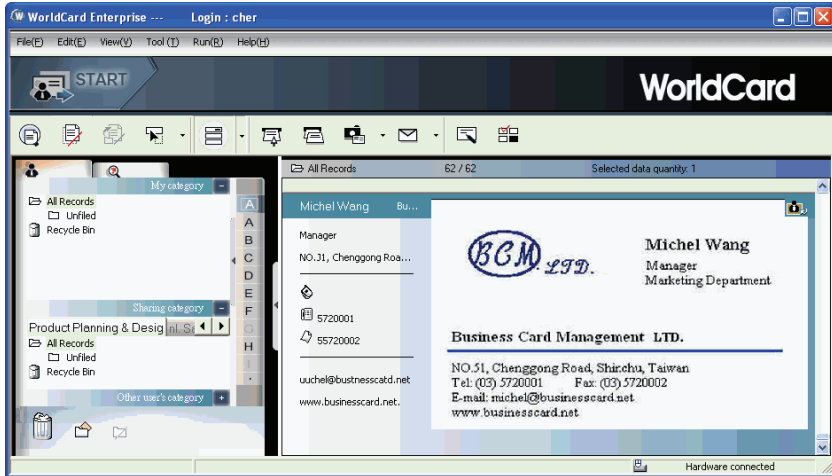
Besides the contact information, you can also quickly discriminate the single  and double sided card  from their different image.


**Tip:** You may select the displayed fields from the **Tool/Setting/Field Setting** menu.

### 3.5.2 Label Mode View

**Label Mode** View displays contact information and business card at the same time.



The contact information shows display name, company, title, office address, mobile phone number , office telephone number , office fax number , Email address and website.




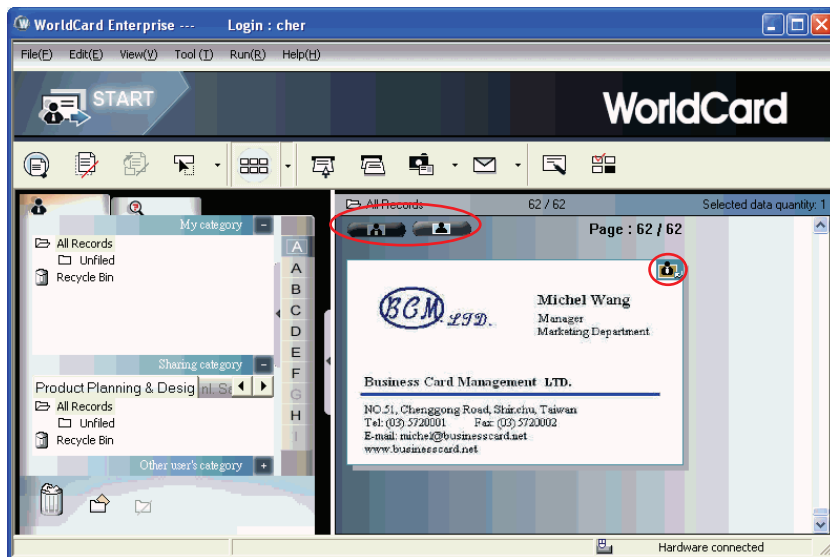
This icon  means the business card is double sided.



### 3.5.3 Image mode


Click  button to view front side of business cards, click  button to view back side of business cards.

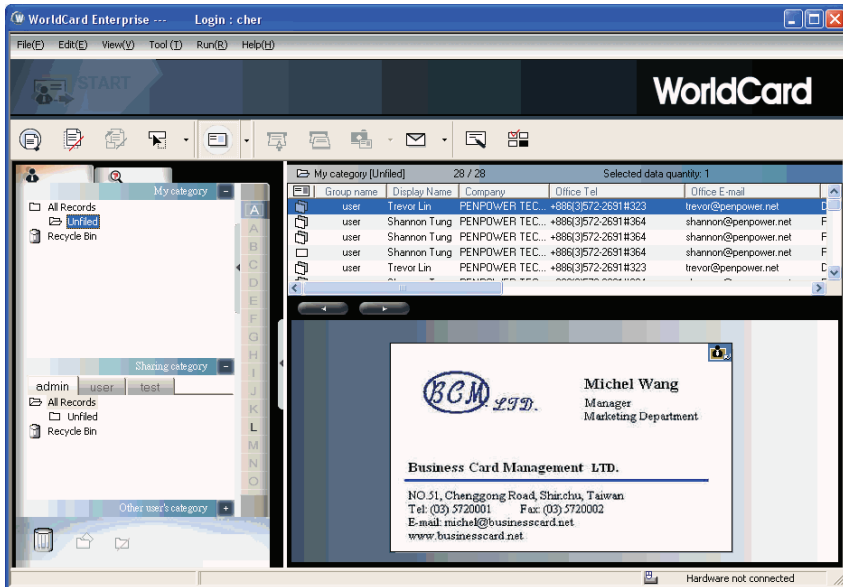
When the icon  shows on the right top corner, it means the contact has double-sided business card image. You can click on the icon to see another side of business card image.



### 3.5.4 Dual mode

**Dual mode** lists the scanned contact information on the top right management window and can display the front and back side image of the business card from Bottom right of the management window. You can click the front or back side icon of the card to magnify it.

When the icon  shows on the right top corner, it means the contact has double-sided business card image. You can click on the icon to see another side of business card image.






## Chapter 4 Editing Cards

### 4.1 Editing Window Overview

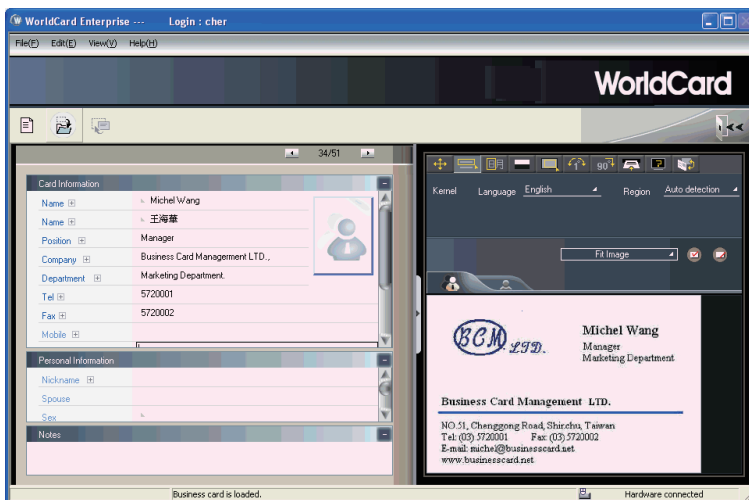
The **WorldCard** Editing window allows you to edit the information of individual business cards.

To select the **WorldCard Editing** window, simply double click on any card record in the list menu of the **WorldCard Management** page. Or, you may click the **Edit Selected Record** icon  to the **WorldCard Editing** window and edit the selected records.

You may click a record and press on Ctrl or Shift key of your keyboard, and then click another record for multiple selection.

### 4.2 Verifying Contacts

The editing window allows you to verify the individual contact information for any specific business card. Once the editing window is open for a card, the following screen will be presented containing information relevant to the card selected from the **Management** window.

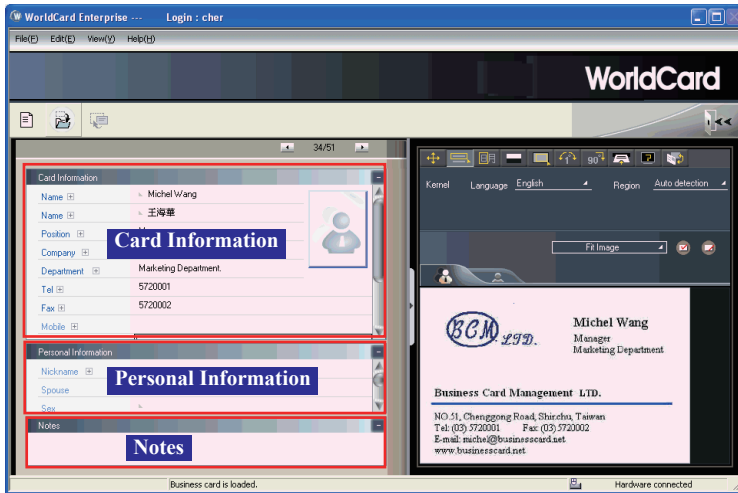


The **Editing Window** may be used to edit any information on a business card and to correct or update information as necessary for future changes of an individual contact. The features and functions of this window are as follows:



## 4.3 Editing Contacts



**WorldCard Editing** window has three sub-windows, the **Card Information** window, the **Personal Information** window and the **Notes** window. The **Card Information** window displays all relevant business card data which was retrieved from the card recognition function of **WorldCard** software. See the **Card Information** window as represented in the following picture.




The information in the **Card Information** window is categorized in fields such as Name, Position, Company, Address, Telephone/Fax numbers, Email address and Web Site. A few additional categories are also available in the **Card Information** window.


The **Personal Information** window displays personal information about your contact which is not retrieved from your contacts business card.

The **Notes** window stores/displays important data from your personal notes about your business contact.

*Note: If at any time during the editing mode, an incorrect action is selected. You may reverse the changes by selecting the Restore Icon  from the Editing Window. Selecting the Restore Icon , will delete the last change made and restore the appropriate content of the business card.*

To exit the WorldCard Editing window, right click on the **Exit** icon  or select **Exit** from the File menu of the WorldCard Editing window.

### 4.3.1 Recognizing Partial Content of a Card Entry

In some cases, the information of a business card may not be completely recognized by the **WorldCard** business card recognition system. You may use the Partially Select and Recognize function of the **WorldCard Editing** Window. To select the Partially Select and Recognize function, press this icon  of the Editing Window.

After selecting the Partially Select and Recognize function, you can select the information from the business card that requires correction by using the mouse to select the specific area which contains the correct data.

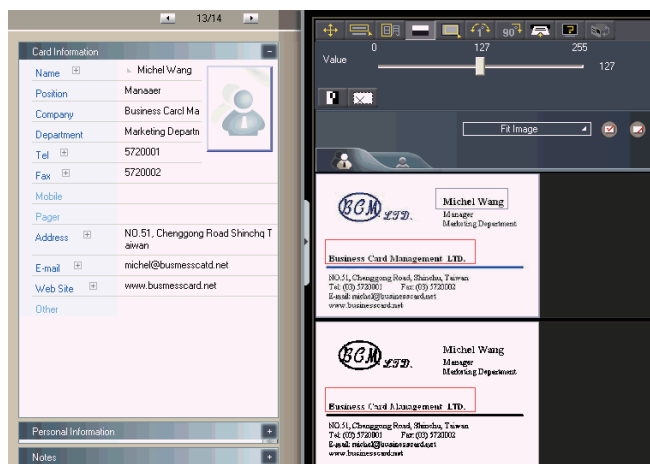


After selecting the area, a pop up window will open. This allows you to select the appropriate category for the information which has been highlighted.

### 4.3.2 Adjusting Separation Rate

Separation Rate is the rate of separation between the color of the card background and the color of the text data contained on the business card.

After selecting the **Separation Rate** icon , the following window will appear.







You can move the sliding scale of Separation Rate to achieve the clearest contrast between the background colors of the business card and the text which appears on the card. This adjustment is useful when the business card image is blurred, or the contrast between the text and the background of the card is not sufficient for correct recognition of the card information.

You may also adjust Separation Rate individually. On the top business card image, select a specific area, and move the sliding scale of separation rate to achieve the clearest contrast between the background and text of the selected area. It supports multiple area, each area has its own separation rate. Click button to remove selected area. Click button to reverse selected area.

### 4.3.3 Deframing Function

The Deframing Manually function allows you to select a specific area of a business card to save. Once the appropriate area is selected, a box will be drawn around the selected data and the following pop up window will appear.

If the data selected to be modified is correct, select **Yes** from the pop up window. The data outside of the selection box will be removed from the card.







### 4.3.4 Fine Rotate

The **Fine Rotate** function of your WorldCard editor is used to correct the horizontal positioning of a card after it has been scanned. This is sometimes necessary if a card has been inserted into the WorldCard scanner incorrectly and the resulting scan is skewed in the horizontal plane. An indication of a card that has been improperly scanned is as follows:



### 4.3.5 Rotating Card


If the card image shows in an incorrect orientation, you can use the Rotate Card function of the WorldCard Editor to properly align the card orientation. To use the Rotate Card function, select the **Rotate Card Icon**  in the WorldCard editor window. Once you select the icon , the following screen will appear.

Select the appropriate angle of rotation and then click the **Rotate** icon . The card image will then rotate to the selected orientation. Should you need additional fine adjustment of the card image, select the **Fine Rotate** icon  and adjust as required.




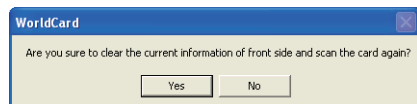
The rotation angle is selectable from a pull down window.

### 4.3.6 Rescanning Card

If a card is scanned inappropriately, you may use the Rescanning function of the WorldCard editor by selecting the **Rescanning Card icon** . After selecting the Rescanning function Icon, the following window will appear.

You may select the appropriate languages from the pull down menus. WorldCard software will display the appropriate language menus for single sided or double sided cards. The menu for a double sided card is as right:


Once you have selected the appropriate language settings, you may click the **Scan** icon  to rescan the business card. The card must then be inserted into the WorldCard scanner as appropriate for the orientation of the languages selected.






### 4.3.7 Recognize Again

*Note: After adjusting a card image with any functions of the WorldCard Editing window, you may recognize the business card again to update the WorldCard image processing of your revised card image.*

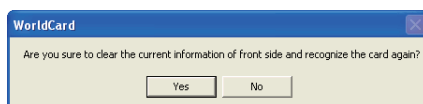
After a card has been edited using the WorldCard Editing window, it may be necessary for the WorldCard character recognition software to re-recognize the card data. This task can be accomplished by selecting the **Recognize again** icon  from the WorldCard Editing window.




Select the appropriate language(s) for the front and/or back side of the card. Then, select the correct region for the language. You may select the Auto detection feature in the geographic region selection. If the card is double sided, select the Both Sides function to recognize each side. You may then proceed with the Recognize again function by clicking on the **Recognize** icon .

Once the **Recognize** icon is selected, the following prompt will appear in the WorldCard Editing window.

Select **Yes** to begin the recognition process. Please note that the card information will be clear when you click Yes.

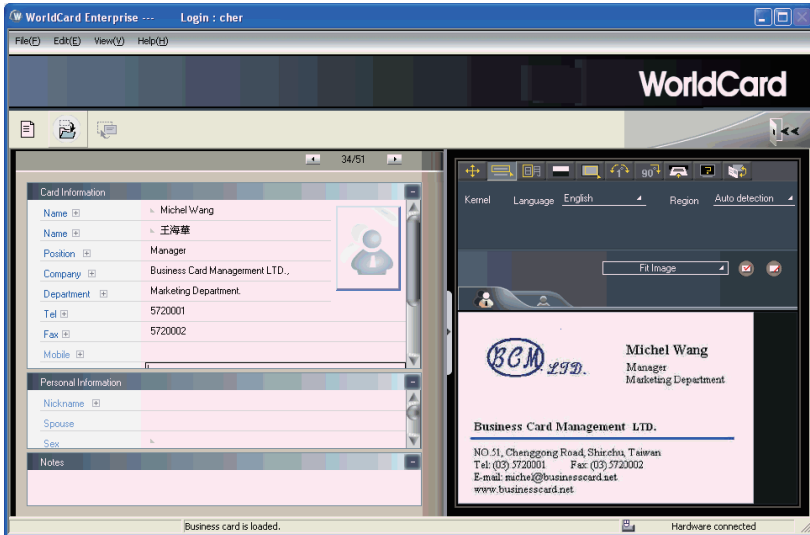


### 4.3.8 Front and Back Business Card Image Exchange


Click  to exchange front side and back side business card images.

## 4.4 Viewing Cards


Cards are displayed in the WorldCard Editing window after the scanning process. The following window shows a typical display of a card in the editing window.




You may click **Back Side** icon  to see the back side image of the business card.


You could click on  to select the different display percentage of the business card image.

### 4.4.1 Saving Card Image

If the displayed card image is clear and the information legible, the card image can be saved as a jpg file to your hard drive by selecting the **Save Card Image** icon .

### 4.4.2 Deleting Card Image

To delete a card image from the WorldCard Editing window, select the **Delete Card Image** icon  with your mouse pointer.

If you have made an error in the Delete Card Image process, the Worldcard Editing window allows you to recover the card image by selecting the **Restore** icon .



## Chapter 5 Managing Business Cards

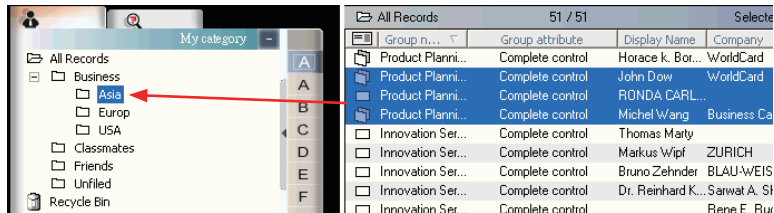
The management functions of your **WorldCard Enterprise** allow you to categorize contacts, send e-mail by contact or group functions, add new cards to a group, import cards from other sources, search cards by various data fields, file encryption features to protect your card database, printing cards and exporting database to other applications.

### 5.1 Categorizing Cards

The **WorldCard Enterprise** allows you to manage your business cards by storing them in the category groups. After installing your WorldCard Enterprise, you will find two default categories on the management page, the All Records category and Unfiled category. You may add as many user specified categories and sub-categories to manage your business cards as you chose.

#### 5.1.1 Categorizing from Management Page


Each card apart from being categorized by last names, can also be categorized with your own individual settings, so that you can efficiently manage numerous cards in your WorldCard database. From the WorldCard Management page, highlight the card information you want to categorize, drag and drop it directly into a specific category type under Category list on the left side of the management window.



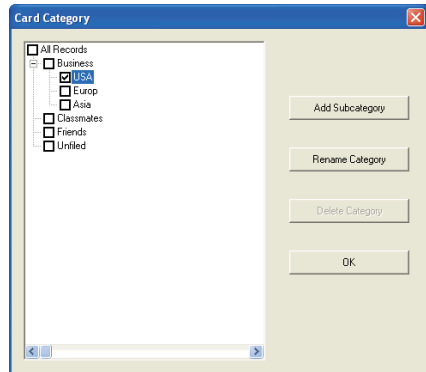
*Tip: Cards in each category can be easily moved from one category to another using the drag and drop feature.*



### 5.1.2 Categorizing from Editing Page

WorldCard allows you to categorize a business card directly from the **WorldCard Editing** page. To categorize a card from the editing page, click on the Set Category icon . The **Card Category** pop up window will appear.


Select the category and then click the **OK** icon from the window. You may also add a Subcategory from this window by clicking the **Add Subcategory** icon.



## 5.2 Sending E-mail/Open Website/Display map of Address

### Sending E-mail

To send Emails to a category group, select the appropriate category group from the management page. Once selected, the category will appear on the right side of the **Management Page**.

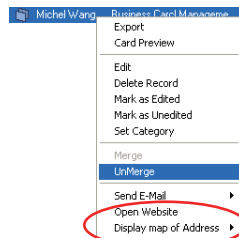
To send Email to the group, select the Email icon . WordCard will add the email addresses of the group members into your default email software. Also your Email editing window will then open with the appropriate contact list.

### Open Website

Click right button of the mouse from one contact, select **Open Website**, it can link to website page automatically.

### Display map of Address

Click right button of the mouse from one contact, select **Display map of Address** and **country**, it can launch the map web page to display the map of the address.



## 5.2 Merging and Separating Cards

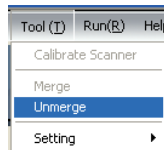
WorldCard Enterprise allows you to merge two business cards into one card entry. To merge two cards into one, select two cards in the Management window .

From the Main menu bar of the Editing window, select the **Tool\Merge** and the following window will appear.

Select the appropriate card as the front side of the Merged card entry and press the **OK**. This action will merge the cards into one entry.



Separating double sided cards into two distinct card entries may also be accomplished with the WorldCard Enterprise package. To separate a double side card into two separate entries, select the appropriate card from the **Management** window. Then, from the **Main** menu bar of the **Management** window, select the **Tool\UnMerge** function. The double side card will then be separated into two separate entries in the appropriate category.







## 5.3 Adding new Cards

You may add contacts to your WorldCard database by scanning their business card, or by manually entering the contact information. If you do not have a card from a new contact, the **WorldCard Enterprise** allows you to enter the contact information of a new business contact into your WorldCard database manually.

### 5.3.1 Adding an Empty Card

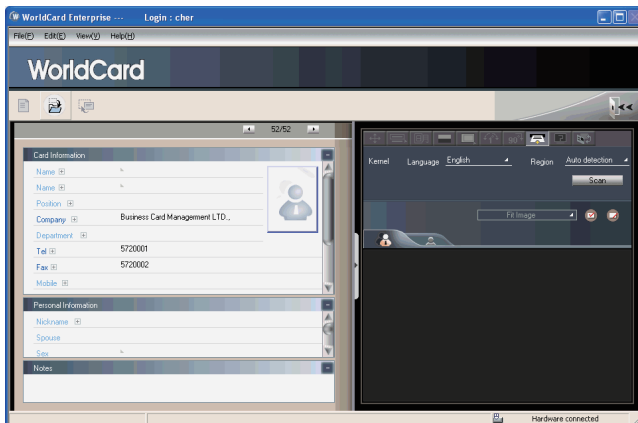
To enter a contact manually without a business card, use the **Management** window. From the **Main** menu bar, select the **File** icon. Then, select **New\Empty Card** from the following options menu. This will open the **WorldCard Editing** window.

From the **WorldCard Editing** window, manually select each category for your new contact. Then, type your new contacts information into the field.

### 5.3.2 Adding the Same Company Card

WorldCard allows you to add contact information for a new colleague of a company is already in your database without scanning the actual business card. To add a new colleague of a company already on file, from the WorldCard Management window, select a card from the new colleague's company.

Once you have selected the card of one new colleague's coworker, from the **Main Menu** bar of the **Management** window select the **File\New\Same Company Card**. This will open the **WorldCard Editing** window.




On the left side of the **Editing** window, the new colleague's company information will appear in the **Card Information** section of the **Management** window.


## 5.4 Adding Cards from Other Resources

The **WorldCard** Business Card Scanner and other **WorldCard** recognition products are equipped with a card scanner or camera which are used to capture a card image. However, you may use other hardware resources in conjunction with your **WorldCard Enterprise** to process card images.

### 5.4.1 Photo File

**WorldCard** can process a business card entry from a photo image in either a bmp format or a jpg format. To use this option of your **WorldCard Enterprise**, you must have a picture image of the card on an accessible medium which your computer can access directly, as well as connecting the camera or scanner. To select an alternative image source from the **Image Source** icon . From the pull down menu, select the appropriate image source, (Photo File or Twain Scanner).



### 5.4.2 Twain Scanner

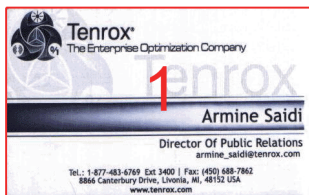
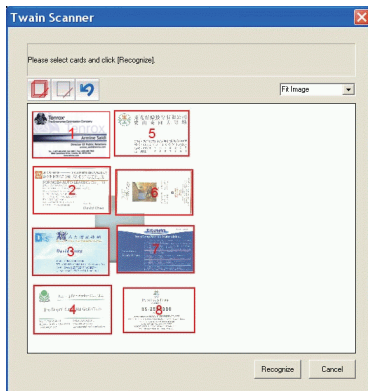
Card entries may also be accomplished through any twain scanner hardware resources. If your scanner is connected, **WorldCard Enterprise** will recognize it and add the scanner to the resource list. You may select the **Twain Scanner** option from the **Image Source** icon's  pull down menu.

Ensure that the resolution for your scanner is set to at least 300dpi.

*Tip: You may scan up to 8 cards at one time with an A4 size flatbed scanner. Place the card on the bed of your scanner with some separation between the card edges to clearly distinguish each individual card. You may also put an A4-size white paper to cover the business cards for recognizing regions of business cards properly.*

When the scanning process is completed, the following **Twain Scanner** window will appear.

You may also recognize the cards automatically by selecting the **Clear All Regions** icon . This will remove all red recognition rectangles from your **Twain Scanner** window. Then click the **Auto Select Regions** icon . You will see the recognized cards identified as in the previous display of the **Twain Scanner** window. Recognized cards will appear within red rectangular boxes with their appropriate recognition number also imposed in red. Please see the following example of a correctly recognized card, (number 1.) and so on.



Once the cards have been identified, select the **Recognize**. When the recognition process is completed, **WorldCard** will return to the **Management** window. You will find that your new card entries will appear at the bottom of your **All Records Category**.

## 5.5 Searching Contacts

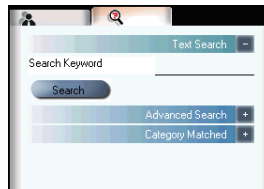
With the **WorldCard Enterprise**, you can quickly and efficiently find your contacts with the **WorldCard Search** functions.


### 5.5.1 Text Search

The Text Search function of the **WorldCard Enterprise** allows you to quickly find a specific contact. To enter the Text Search function from the WorldCard Management window, you may select the Text Search mode by clicking **View\Search\Text Search**.

After selecting the Text Search function, the Text Search screen will open and appear as follow.

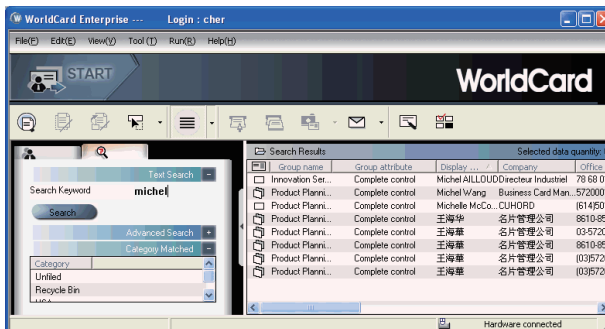
*Tip: You may enter the Text Search window directly by clicking the Search Window icon .*



From the Text Search window, you may enter a key word or a group of key words separated by a blank space in the text field window  . After entering your search string click the **Search** icon . Once the scanning of all records has been completed, the Search window will update with a display of the results found. The display may appear as in the following picture.

On the left side of the window, you will find a list of all categories where the data from your search string was found. The right side is the Search Results that display all of the applicable fields for the cards stored in your WorldCard database.

You may double click on any record displayed in the Search Results window to open the card in the Editing window.





## 5.5.2 Advanced Search

WorldCard also offers an advanced search function. To use the advanced search function, you may click on the **View\Search\Advanced Search** menu.

After selecting the **Advanced Search** function, the **Advanced Search** screen will open and appear as right.

***Tip:** You may also enter the Advanced Search window from the WorldCard Management window by clicking the Search Window icon . Once the Text Search screen appears, click on the Advanced Search “plus” tab .*

From the **Advanced Search** window, you may enter your search criteria by category. You may select from categories in any one of three option windows. If you have several cards with similar criteria in your database, you may narrow your search further by using more than one of the **Search Criteria** menus.

Once a **Category** for your **Advanced Search** is selected from one or, all three **Category** list, you may enter an appropriate search string in the text window of each **Category**. A completed search will appear as right.

Please also note that the **Search Criteria** options include the **(and)** function ☐ and and the **(or)** function ☒ or. You may use these functions to further define your Advanced Search process. The **(and)** function defines that your search results should contain the criteria listed in all three Search Criteria windows to be a valid result. Using the **(or)** function, a valid result must only match one of any of the three fields to be a valid result.

You can further define your **Advance Search Criteria** by using a specified **Category**. To select a specific category, click on the **Select Category** option box ☒ **Select Category** and specify a Category.

You may also define your **Advanced Search** by calendar dates. To define a period for an **Advanced Search** by **Dates**, click on the **Select Dates** icon ☒ **Select Dates**. This will highlight the selection of the **Select Dates** function by placing a check mark in the box.

After selecting the defined search by date function, you may use the **From** and **To** date windows to specify a period for your search criteria. The **From** and **To** windows appear as in the right picture.

☒ Select Dates

From... 1/ 4/2006

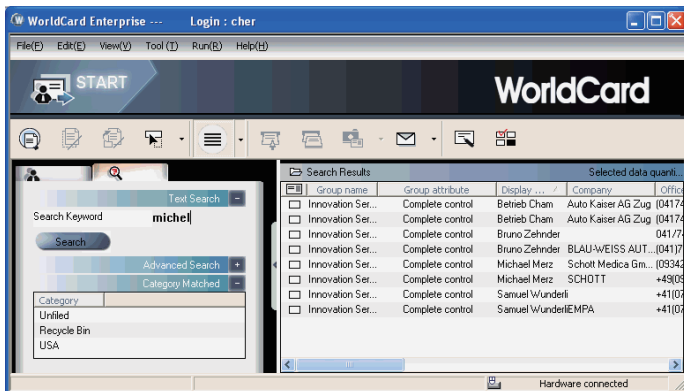
To... 9/ 7/2006

### 5.5.3 Finding Duplicate Data

Over a period of time, you may find that you have received a business card from the same individual on more than one occasion.

**WorldCard** has a built in function for Finding Duplicate Data. To use the Finding Duplicate Data function, select the **Run\Duplicates Data** from the Main Menu.

Once selected, the **Duplicates Data** function will briefly display a progress meter in the middle of the **Management** window showing the percentage of progress for the search function. After all records have been scanned, the **Search** window will open and any duplicate entries will be displayed in the window. The display may appear similar to the following picture.



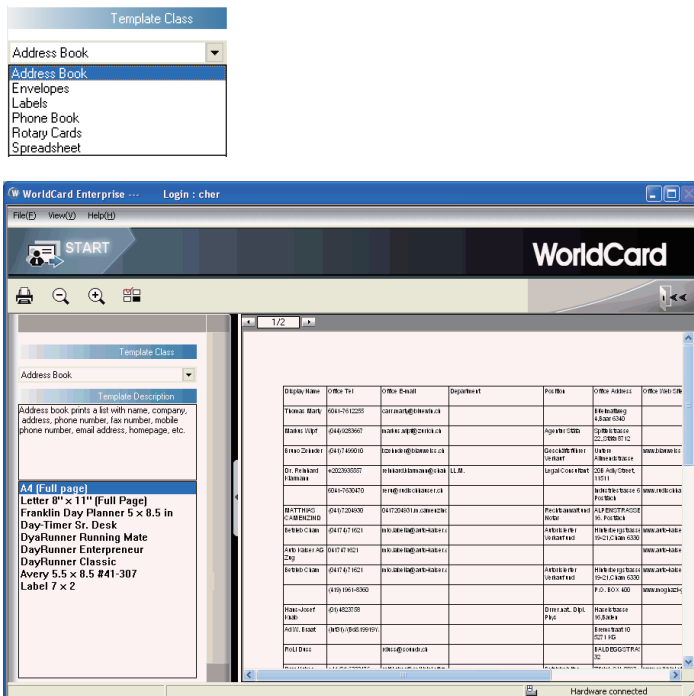
On the left side of the window, you will find a list of all **Categories** where **Duplicates Data** was found. On the right side of the **Search** window, you will find a list of all duplicate card entries.



## 5.6 Change password

Every user has a **User Name** and **password**, the password is variable. Run **File\Change password** to open the change password window. Please input the current password and new password to change your password.


*Note: Please memorize the password, otherwise you cannot login WorldCard Enterprise.*

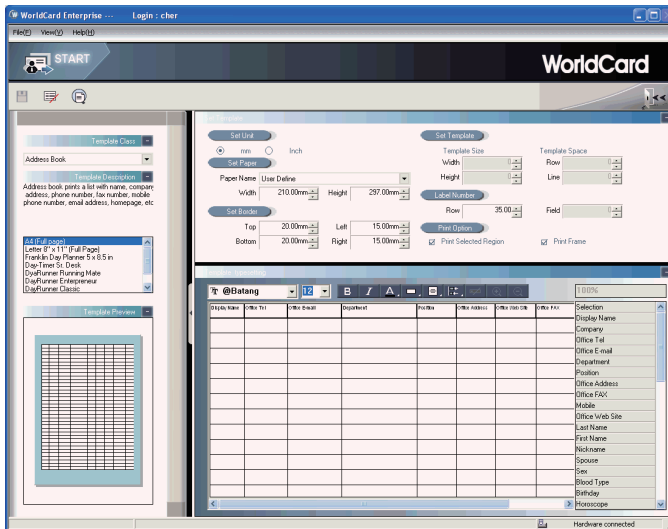






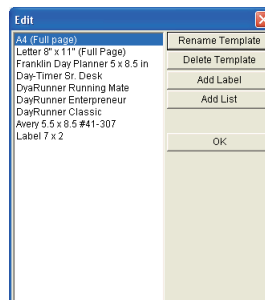
## 5.7.2 Editing Print Templates

WorldCard Enterprise allows you to edit templates for printing your cards. Select **File\Print Template Edit** from Main Menu, the following window will appear. You may also click on the **Edit Print Template** icon .



To edit the Print Template, you may select a **Template Class** and **Template** from the left side of window. Then adjust the settings of the print paper from the top right side. If you wish to choose print fields, you may drag and drop the field into the template editing area.

WorldCard provides **Add Label** and **Add List** template model for creating your own templates. You may select **Edit...** from the **Template Class** pull down menu, the right window will appear.



To add a new print template, click on the Add Label or Add List button, and then enter the template name. Click **OK** to return to the Print Template Edit window for editing the new print template.

*Note: You may also rename or delete templates from the Edit function.*

## 5.8 Exchanging Contacts

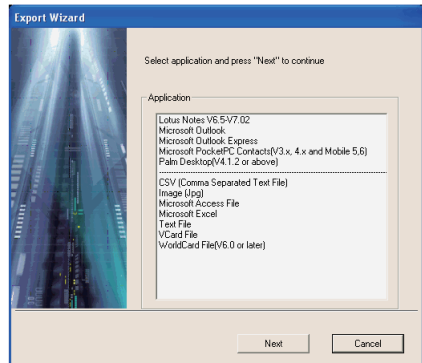
**WorldCard Enterprise** allows you to exchange valuable contact information with other applications through the use of the Import, Export and Synchronize functions.

### 5.8.1 Export

To select export fields, you may refer to 5.9.1 Export Option for detailed explanation.

To Export your **WorldCard** database to another application such as Microsoft Office applications, (Word, Excel, Outlook or Outlook Express,) select the Export function from the **File\Export** of the Main Menu.

This will open the **WorldCard Export Wizard** screen and the right window will appear.



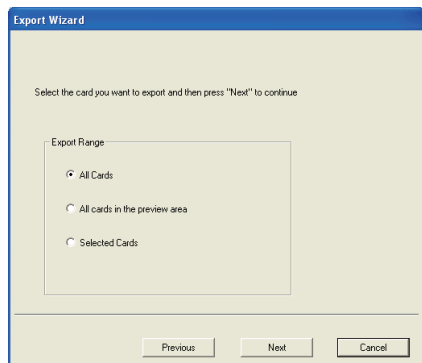
To use the **Export Wizard**, select the type of application to export your **WorldCard** database to or, the file type that you want to create.

*Tip 1: Export Text File allows you to export all fields.*

*Tip 2: Export function supports on Excel 97, Outlook 97 and Outlook Express 4.0 version and higher.*

*Tip3: Export to Excel file, WorldCard transfers the different categories of contact information to different sheets.*

Then click on the **Next** icon in the **Wizard** window. This process will open the right Export window.





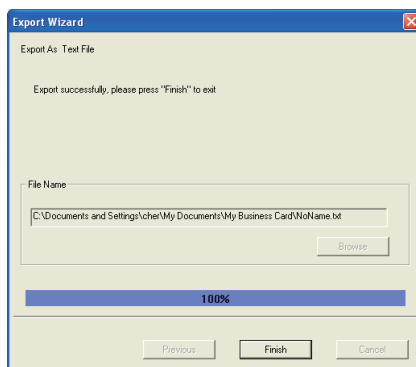
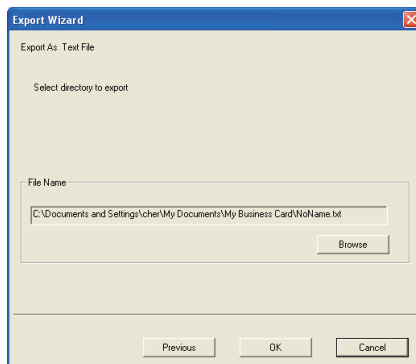
Follow the instructions listed in the **Export** window to select the cards you want to export. And then click the **Next**.

If you have chosen to continue with the **Export** function, you will find that the right directory selection window has been opened.

You may select **OK** to export the cards.

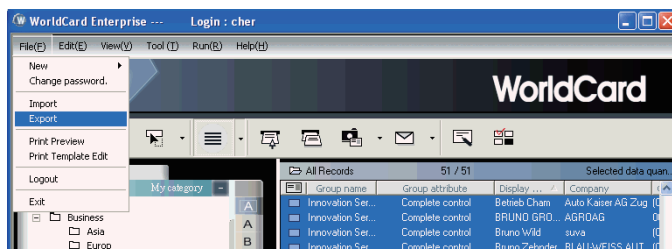
To complete the file **Export** procedure, review the information displayed in the **Wizard** window.

When the progress bar reaches 100 percent, the export process is complete. Click on the **Finish** to close the **Wizard** window.



The **Export Wizard** operations are similar for exporting your **WorldCard** database to all application types and will not be individually discussed in this manual. However, a brief overview of the Export of a card to Microsoft Outlook will be present.

To Export a card to Microsoft Outlook, select a card or a group of card by selecting the specific card(s) in the **WorldCard Management** window as shown in the following picture.

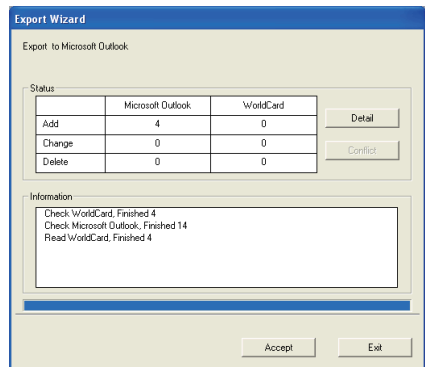
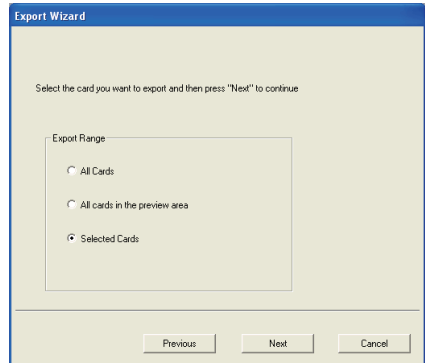


Then, select **File\Export** from the Main Menu.

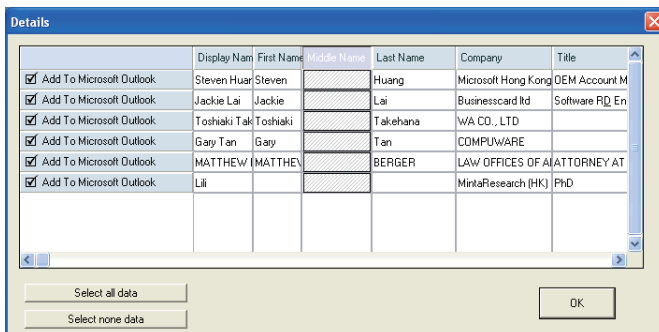
Once you have selected the Export option, the **Export Wizard** window will open as previously displayed in the section. Select the Microsoft Outlook application from the **Wizard** window and click **Next**. The right **Export Wizard** window will be displayed.

Select the **Selected Cards** option for an **Export Range**. Then press the **Next** to proceed.

After pressing the **Next** in the previous paragraph the following **Export Wizard** status window will appear.



Once the Export process has been completed, you can view the **Details** page as shown in the following picture by selecting the **Detail**.





From the **Details** window, you can select to export all details of each card or none. To close the **Details** window and proceed, click the **OK**. This will return you to the **Export Wizard** status window as seen previously in this section.

To complete the **Export** process, click on the **Accept**. You may see a suspicious script warning window at this time. Choose the continue option from the warning window to proceed. Your **WorldCard Export Wizard** will now display the completed Status and Information of the exported cards being processed.. To complete the **Export Wizard**, click on the **Finish**. This will close the **Export Wizard** and return to the **WorldCard Management** page.

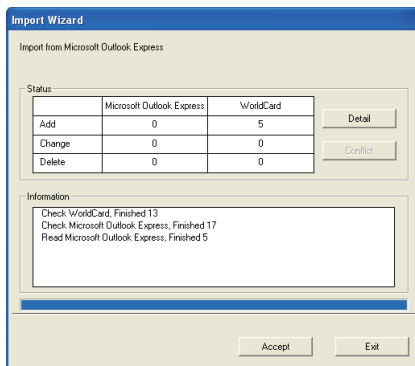
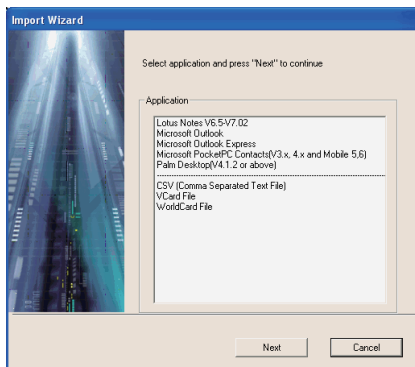
## 5.8.2 Import

To Import data into your **WorldCard** database from another application such as a Microsoft Office application, (Word, Excel, Outlook or Outlook Express,) select the Import function from the **File\Import** Menu.

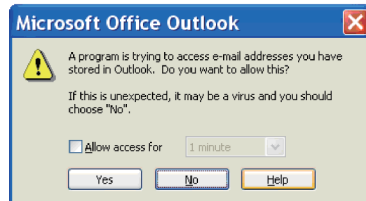
This will open the **WorldCard Import Wizard** screen and the right window will appear.

To use the **Import Wizard** screen, select the type of application source you desire to import into your **WorldCard** database.

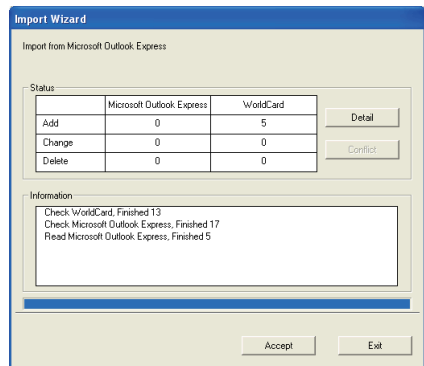
Then click on the **Next** in the **Wizard** window. This process will open the right **Import Wizard** window.



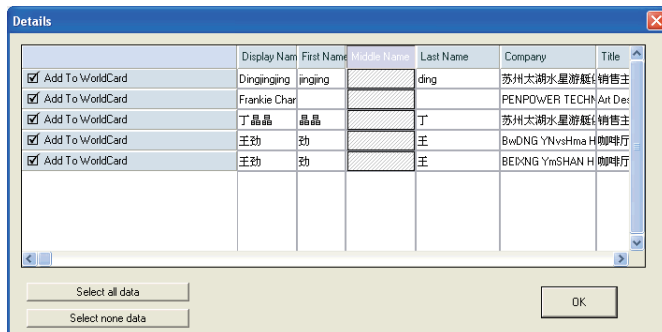
*Note: When importing data from a Microsoft Office application such as Microsoft Outlook, you may receive a warning window to advise you that a program is trying to access email addresses information from the application. This warning window may appear similar to the following picture depending on your version of Microsoft Office. To continue click the Yes of the warning window.*



While the **Import** function is being processed, you will find that a blue progress bar is active in the **Import Wizard** window. Once the process is completed, the **Import Wizard** window will display Status and Information. The **Import Wizard** window will appear as follow.



You can view the actual information being imported from the **Details** page as shown in the following picture by selecting the **Detail**.






From the **Details** window, you can select to import all details of each card or none. To close the **Details** window and proceed, click the **OK**.

To complete the Import process, click the **Accept**. The **Import Wizard** window will update the Status and Information fields for the data accepted. When the update is completed, click the **Finish** to close the **Import Wizard**. You will find that your imported records have been added to the bottom of the cards listed in All Records category.

## 5.9 Settings

**WorldCard** has many selectable Setting options to allow you to configure the operational functions of **Export**, **Field Display**, **Group** and **Scan** options. To set your **WorldCard** options, use the procedures outlined in this chapter.

Open the Setting window from **Tool/Setting** of the Main Menu. Alternatively, you may open the Settings window from the  bar.

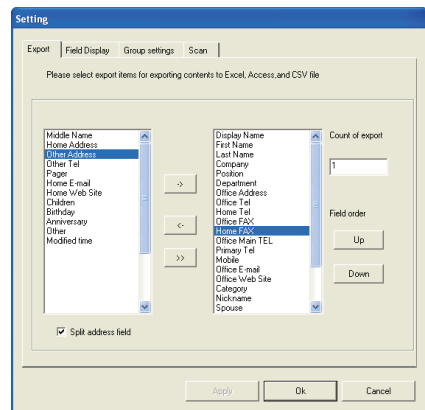
### 5.9.1 Export Option

To use the Setting option page to configure the Export options, open the **Setting** page as described in the preceding section of this chapter.

The **Setting Export** option page will open with ALL options selected as a default configuration. The right side fields will be export to Excel, Access and CSV file. To add another field, select a field from the left side and click [->] button. Click [>>] button to export all fields. Each field can be set the count of export for exporting up to 10 fields of the same name field.

Select **Split address field** to export address detail in different fields.

Once the modifications are completed, click on the **OK** to accept the changes and close the window.







## 5.9.2 Field Display

To use the **Setting** option page to configure the **Field Display** options of the List Mode, open the **Setting** page as described in the preceding section of this chapter.

The **Setting Field Display** option page will open with a default configuration as displayed in the above window. To modify the selected options, click on any available Field to select an available field from the menu on the left side of the window. Once a field is selected, click on the **Add** icon to add it to the **Displayed Field** list. The selected field will be added to the applicable

windows of your **WorldCard** screens. To remove a field for your **WorldCard** screens, click on the desired field in the **Displayed Field** window. Then select the Remove icon to delete the field from your **WorldCard** screen displays. You may also set field option from the available options on the right side of the **Field Display** window. Once you have completed your changes, click the **Apply** to apply any changes.

The Alphabet index can be indexed **by Display Name** and **by Company**. Please refer to **Chapter 3.1**.

## 5.9.3 Group Settings

If you belong to several groups and have the full control authority, you can select a default group to scan and add contacts into the group.

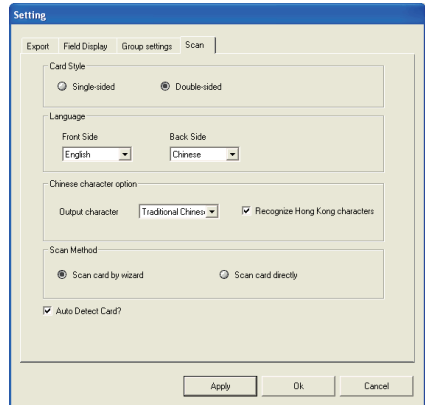
As the right side of picture, the user has the full control authority for two groups. The user can select one of them as a default group.

Group name	Group attribute	The contact amount
<input checked="" type="radio"/> Product Planning & Design	Complete control	251
<input type="radio"/> Innovation Services	Complete control	107

### 5.9.4 Scan Option

To use the **Setting** option page to configure the **Scan** options, open the **Setting** page as described in the preceding section of this chapter.

The Settings Scan option page will open in the default configuration as seen in the preceding picture. You may define Card Style, Language, Chinese Character options and Scanning method from the Scan Settings option menu. You may also select Auto Detection from the Scan option window. Once you have completed your Scan option settings in the Scan option window, you may close the window by clicking the **Apply** to complete the process.

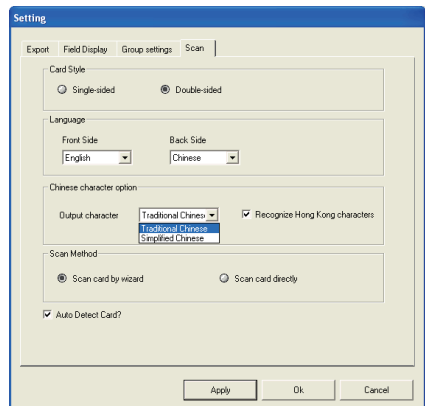


### 5.9.5 Revising the Results of Chinese Card Recognition

**WorldCard Enterprise** has optical character recognition (OCR) capabilities design to work specifically with Chinese characters.

To optimize the settings for recognition of a Chinese language card, from the Setting window, under the Chinese character option settings, you may select the Traditional Chinese character set or the Simplified Chinese character set from the Output character pull down menu as shown in the right picture.

Under the Chinese character option section, you may also highlight the selection box for **Recognize Hong Kong characters** if you are scanning cards from Hong Kong. The character set for Hong Kong is slightly different than the Traditional or Simplified Chinese character sets. To highlight the Hong Kong characters option, click on the selection box. A check mark will appear in the box.





## FAQ

**Q: How do I import the contacts from WorldCard Color, WorldCard Office and WorldCard duet into WorldCard Enterprise?**

A: WorldCard Enterprise provides importing contacts from WorldCard Color, WorldCard Office and WorldCard duet v6.0 or later version. You may import the contacts via **File\Import\WorldCard file**.

**Q: Why are there some dark lines on the scanned pictures of business cards, or all scanned pictures turnout blank?**

A: Before the first use of WorldCard, the system will ask you to complete **Calibration**. If the problem still exists during usage, please choose **Tool\Calibrate the scanner** to proceed with calibration. You can also use **Calibrate the scanner** in the scan wizard for calibration.

**Q: How to combine two pieces of business card data into one?**

A: Please use **Ctrl** and left click on mouse to select two single-sided business card picture files or the image-less data of the card. Then select **Combine** by right clicking on mouse, and set either one to be the front side of the data combined.

**Q: How to separate a single picture file with data including the business card information of front and rear sides into two separate data files?**

A: Select the data including the business card information of front and rear sides, and right click on mouse to select **UnMerge**.

**Q: How to add the signature information in e-mails to the business card files?**

A: Please highlight the signature or business card information in e-mails or Word files. Then drag it directly to the WorldCard program and finish.

# **Penpower WorldCard Enterprise V6.2**

## **User Manual**

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