

WorldCard Team - Windows Server Edition

Administrator Manual

Versio: v1.2

Relesae: March, 2018

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

History

v1.2.0

- March, 2018

Add JRE download instructions.

Page.1-2

Revise JRE set up instructions.

Page.2-1

- Year 2017, first version.

Chapter 1 Server Build Requirements

1.1 Hardware Specifications

The following is the minimum required hardware specifications:

- Processor: 1.6GHz Quad-Core processor.
- Memory: 8GB.
- Hard Disk: 1TB capacity. It is recommended to build up RAID 1 type to protect data.

1.2 Operating System

Choose one of the following supported versions of operating system to use:

- Microsoft Windows Server 2012 (64 bit).
- Microsoft Windows Server 2012 R2 (64 bit), or later.
- Microsoft Windows 7 Service Pack 1 (64 bit), or later.

1.3 Database Software

Choose one of the following supported database software to use:

- Microsoft SQL Server 2012 (32/64 bit).
- Microsoft SQL Server 2014 (32/64 bit).
- Microsoft SQL Server 2016 (64 bit).
- Microsoft SQL Server 2017 (64 bit).
- PostgreSQL 9.2, 9.3, 9.4, 9.5, 9.6, 10.

Note: Microsoft SQL Server Express version is not supported.

1.4 Essential Environment Kits



Please install the following essential environment kits:

- Java SE Runtime Environment 8 (JRE)
- Microsoft .NET Framework 4.5 or later.

How to download JRE suite (The instructions below is only for reference, the real situation might be different.)

Please open the URL (<http://www.oracle.com/technetwork/java/javase/downloads/index.html>), find [Java SE 8u161/ 8u162] item, and click on [JRE] download button.

Java SE 8u161/ 8u162

Java SE 8u161 includes important bug fixes. Oracle strongly recommends that all Java SE 8 users upgrade to this release. Java SE 8u162 is a patch-set update, including all of 8u161 plus additional bug fixes (described in the release notes).
[Learn more](#) ▶

- Installation Instructions
- Release Notes
- Oracle License
- Java SE Licensing Information User Manual
 - Includes Third Party Licenses
- Certified System Configurations
- Readme Files
 - JDK ReadMe
 - JRE ReadMe

JDK
DOWNLOAD ▼

Server JRE
DOWNLOAD ▼

JRE
DOWNLOAD ▼



Find the Java SE Runtime Environment 8u162 version, select [Accept License Agreement] option, and choose [Windows x64 Offline] JRE item to download.

Java SE Runtime Environment 8u162

You must accept the [Oracle Binary Code License Agreement for Java SE](#) to download this software.

☒ Accept License Agreement ☐ Decline License Agreement

Product / File Description	File Size	Download
Linux x86	63.44 MB	jre-8u162-linux-i586.rpm
Linux x86	79.33 MB	jre-8u162-linux-i586.tar.gz
Linux x64	60.44 MB	jre-8u162-linux-x64.rpm
Linux x64	76.4 MB	jre-8u162-linux-x64.tar.gz
macOS	74.18 MB	jre-8u162-macosx-x64.dmg
macOS	65.86 MB	jre-8u162-macosx-x64.tar.gz
Solaris SPARC 64-bit	52.24 MB	jre-8u162-solaris-sparcv9.tar.gz
Solaris x64	50.01 MB	jre-8u162-solaris-x64.tar.gz
Windows x86 Online	1.78 MB	jre-8u162-windows-i586-iftw.exe
Windows x86 Offline	61.36 MB	jre-8u162-windows-i586.exe
Windows x86	64.58 MB	jre-8u162-windows-i586.tar.gz
Windows x64 Offline	68.27 MB	jre-8u162-windows-x64.exe
Windows x64	68.58 MB	jre-8u162-windows-x64.tar.gz

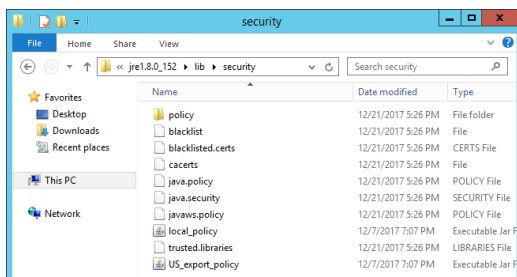



Chapter 2 Install Essential Environment Kits

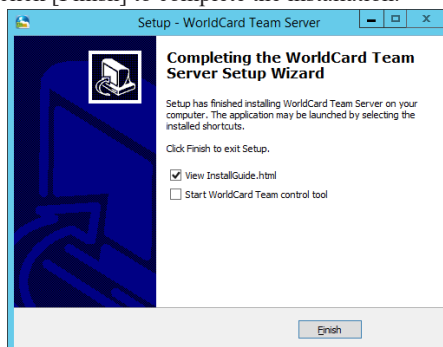
1. After installing the operating system and database software (In this manual, we take Microsoft Windows Server 2012 R2, 64bit, Microsoft SQL Server 2012 (64bit), and PostgreSQL v10 as example), please continue to complete the installations of Microsoft .NET Framework 4.5 or later version, and Java SE Runtime Environment 8 or later version.

Reminder: When installing Microsoft SQL Server, be sure you select to install the [SQL Server Management Studio] suite for creating a new database account for WorldCard Team.

2. After completing the previous installations, please navigate to C:\Program Files\Java\jre1.8.xxxx\lib\security\policy\unlimited, and copy the [local_policy.jar] and [US_export_policy.jar] files to the C:\Program Files\Java\jre1.8.xxxx\lib\security directory .



3. Next, please open the web browser, enter the URL (<http://download.worldcardteam.com/>) to open the download page, select the [Windows Server Edition Download] page, and download [WorldCard Team (Server)] software, and Double-click the file to install after downloading.
4. After the installation, please do not tick to run [WorldCard Team Server Control Tools], directly click [Finish] to complete the installation.

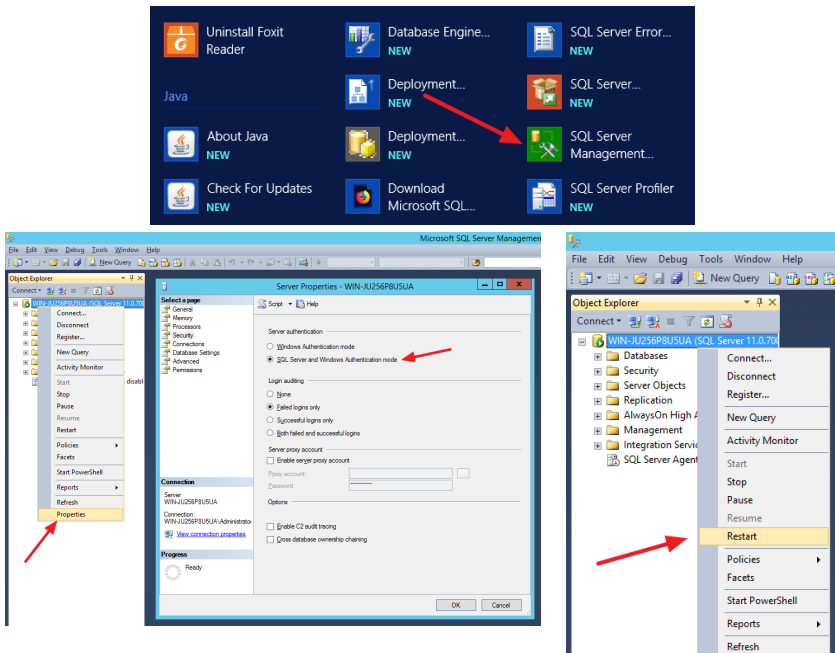


Chapter 3 Database Settings (MSSQL or PostgreSQL)

3.1 Microsoft SQL Server Related Settings

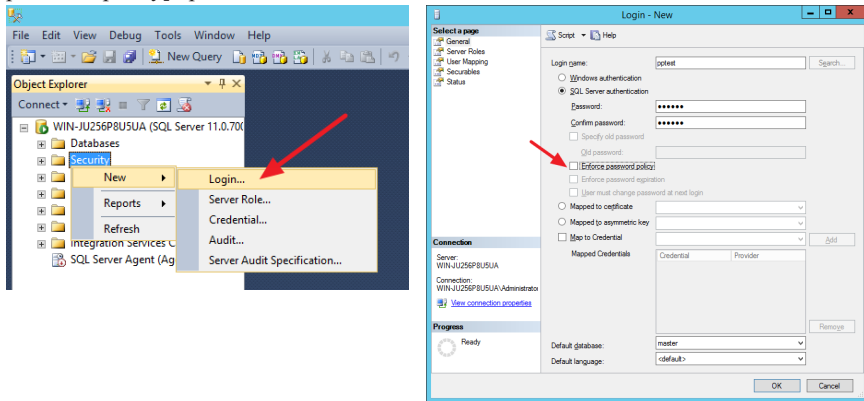
3.1.1 Add Microsoft SQL Server Database Account for WorldCard Team

If you are using Microsoft SQL Server, please open [SQL Server Management Studio] first and log in to access the database with Administrator or sa with the highest permissions. Then right click on the database server and select [Properties]. On the left side of the [Security] page, make sure you have set the server authentication as [SQL Server and Windows authentication mode]; if not, please make changes and right click on the database server and choose [Restart] to restart the database server.

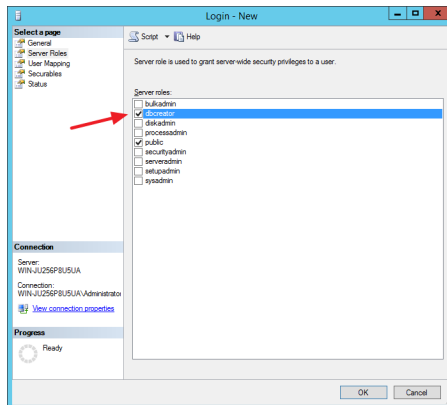


Next, we need to add a Microsoft SQL Server account for WorldCard Team to use, please expand the server folder, and right click on [Security] folder, then click [New \ Login]. Select [SQL Server authentication] in the [General] page, and enter the account / password you want to use (here we take “pptest” as example); Please note that the [Enforce

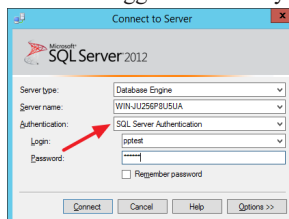
password policy] option below must be checked out.



Then click on the [Server Roles] on the left, and check [dbcreator] for this account, the others is not recommended to check to avoid security problems, and then click [OK] to complete.



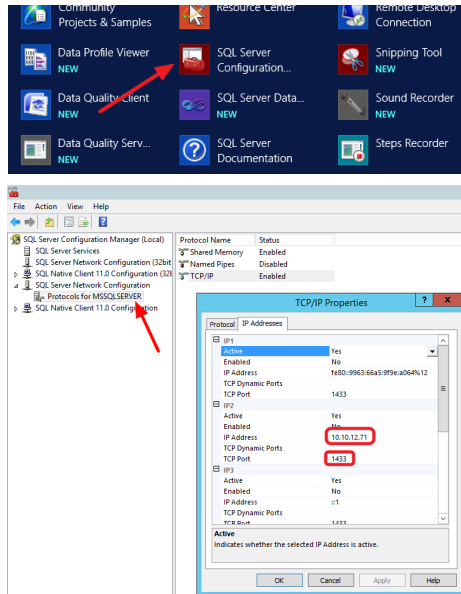
After creating the new account, it is recommended to close the SQL Server Management Studio and re-open it again, and select [SQL Server Authentication] in the [Authentication] field of login windows, then use the account / password you just created to log in to make sure the new account can be logged in correctly.



3.1.2 Confirm Microsoft SQL Server Database connection Parameters

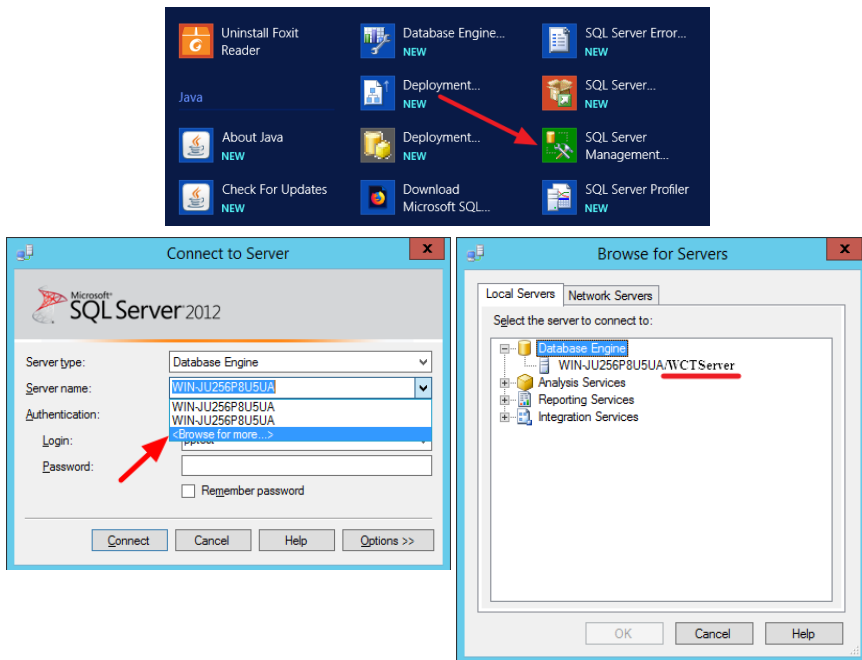
To connect the WorldCard Team Services to the database program, you need to create a dedicated database, and also obtain the necessary connection parameters: [SQL Server host], [SQL Server port] and [SQL Server instance name].

To confirm [SQL Server host] and [SQL Server port] information, please go to [Applications] and open [SQL Server Configuration Administrator]. Under [Server Network Configuration], select the protocol that your database uses, and then look at the [IP Addresses] page of [TCP/IP] item on the right to see the IP address and port information of the database server.



Reminder: The default setting of TCP/IP Network Protocol is enabled, if you found it is disable, please right click on it to enable, and then restart the SQL Server.

To confirm [Instance Name] information, open [SQL Server Management Studio], select [Browse] in the [Server name] field, and then expand the [Database Engine] folder, you can see the [Instance Name] right after the computer name and “/”. Please note that if you install Microsoft SQL Server without setting the Instance Name, there will be no name information here.



3.2 PostgreSQL Distributed Architecture Service Settings

If you are using PostgreSQL and PostgreSQL is not installed on the same server with WorldCard Team service, be aware that PostgreSQL needs to be set for WorldCard Team server to connect:

1. Go to C:\Program Files\PostgreSQL\10\data\ directory and find the [pg_hba.conf] file, and edit it by using Notepad or other software.
2. As shown below, please choose one connection parameter to add in the [IPv4 local connections] item: [host all all 10.10.12.0/24 password] or [host all all 0.0.0.0/0 trust], to enable the computers to connect to this PostgreSQL server.

The first kind of connection parameters:

- Type: host, provide connection.
- Database: all, all databases on PostgreSQL.
- User: all, all accounts on PostgreSQL.
- Address: 10.10.12.0/24, assuming WorldCard Team Server's IP section is

10.10.12.0~10.10.12.255 (the subnet mask is 255.255.255.0), 24 means the server only accept the computer in same network section to connect, which is the computer with IP 10.10.12.xx. Generally speaking, IP address split into 4 sections, the second section is 8bit, the third section is 16bit, the fourth section is 24bit, if you want to allow a computer in other network section to connect, for example, to enable a computer with IP 10.10.xx.xx to connect, you have to change 24 to 16, and also change the third IP section from 12 to 0 to make it become 10.xx.0.0.

- Method: password, use password verification.

#	TYPE	DATABASE	USER	ADDRESS	METHOD
#	IPv4	local connections:			
host	all	all	all	127.0.0.1/32	md5
host	all	all	all	10.10.12.0/24	password
#	IPv6	local connections:			
host	all	all	all	::1/128	md5
# allow replication connections from localhost, by a user with the					
# replication privilege.					
host	replication	all	all	127.0.0.1/32	md5
host	replication	all	all	::1/128	md5

The second kind of connection parameters:

If you think you setting IP network section is troublesome for you, you can use the second parameter.

- Type: host, provide connection.
- Database: all, all databases on PostgreSQL.
- User: all, all accounts on PostgreSQL.
- Address: 0.0.0.0/0, no IP limitation.
- Method: trust, no password verification needed.

#	TYPE	DATABASE	USER	ADDRESS	METHOD
#	IPv4	local connections:			
host	all	all	all	127.0.0.1/32	md5
host	all	all	all	0.0.0.0/0	trust
#	IPv6	local connections:			
host	all	all	all	::1/128	md5
# allow replication connections from localhost, by a user with the					
# replication privilege.					
host	replication	all	all	127.0.0.1/32	md5
host	replication	all	all	::1/128	md5

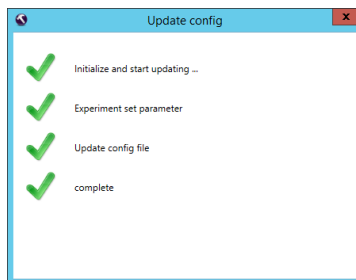
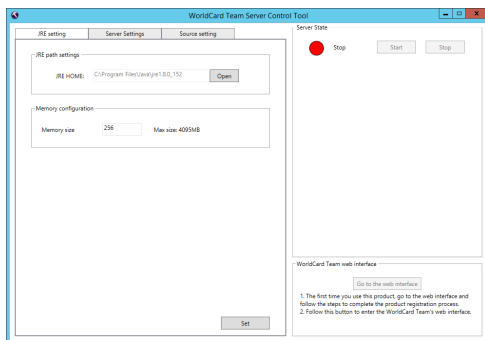
Chapter 4 Connect Database via WorldCard Team Control Tool

Next, we need to connect the WorldCard Team program with database software. In [Applications] of Windows, click [WorldCard Team Control Tool] to open.



4.1 JRE Settings

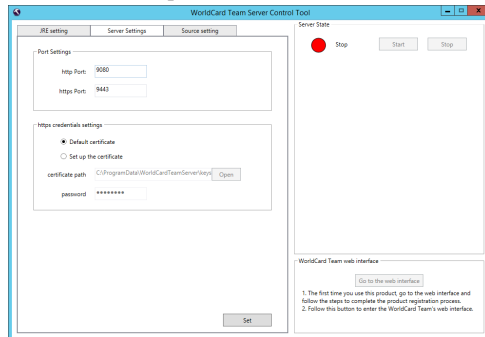
In the [JRE Settings] page, select the path of [JRE HOME], which is the JRE installation directory, for example: C: \ Program Files \ Java \ jre1.8.xxxxx \, then click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.



4.2 Server Settings

In the [Server Settings] page, the default http and https ports of WorldCard Team services are 9080 and 9443, and you can change to other ports. If your company has its own SSL certificate, please assign the path to the certificate, otherwise, please use [Default

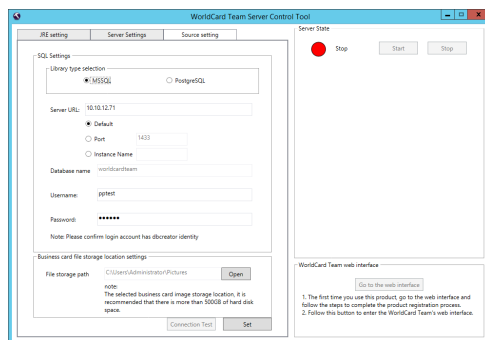
Certificate]. After setting, click [Set] button below, there will be a check procedure, if all set, the check procedure will close up itself.



4.3 Database Settings

The settings of this page is a little mor complicated, and different types of database have different settings.

4.3.1 Microsoft SQL Server

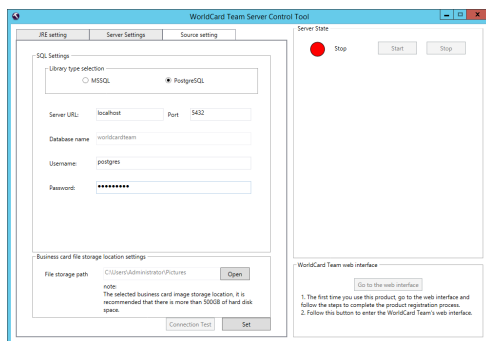


1. Database Type: Please select the database you use, for example, MSSQL.
2. Server URL: Please fill in the [SQL Server host] information described in the previous Chapter, it is recommended that you fill in the localhost IP for now to test, then refer to Chpter 5.5 for outbound network settings.
3. Connection Parameters: If you use the default settings to install Microsoft SQL

Server, please select [Default] here, if you have changed the port or Instance Name, please select [Port] or [Instance Name] and fill in the [SQL Server port] or [SQL Server Instance name] information described in the previous Chapter.

4. Database Name: Please note that it cannot be changed, always named [worldcardteam].
5. Database Account / Password: This is the pptest / pptest that created in the previous Chapter, for the WorlCard Team can read and write the database correctly.
6. File Storage Path: Please assign the location where you want to store all the business card images, it is recommended to assign to the location which at least has 500GB of hard disk space.

4.3.2 PostgreSQL

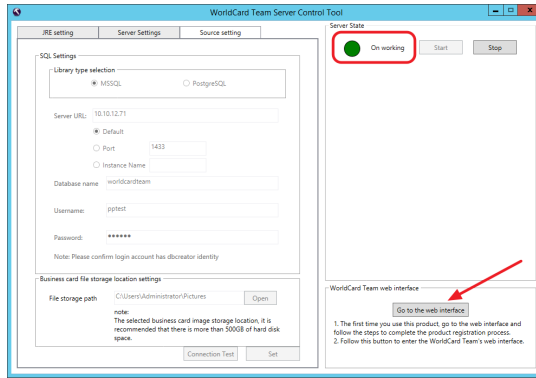


1. Database Type: Please select the database you use, for example, PostgreSQL.
2. If PostgreSQL is installed locally, use the default value of [localhost], otherwise enter the PostgreSQL server's IP or URL. If PostgreSQL is not installed locally, refer to Chapter 3.3 for distributed architecture configuration.
3. Port: Please enter PostgreSQL's port, the default will be 5432.
4. Database Name: Please note that it cannot be changed, always named [worldcardteam].
5. Database Account / Password: Please enter the default administrator account (postgres) and password when installing PostgreSQL.
6. File Storage Path: Please assign the location where you want to store all the business card images, it is recommended to assign to the location which at least has 500GB of hard disk space.



4.3.3 Run WorldCard Team Service

When all the above settings are all done, click the [Set] button below and then click the [Connection Test] button to test. After passing the connection test, start the WorldCard Team service by clicking the [Start] button at the upper right of the [WorldCard Team Control Tool] window, and access WorldCard Team service to activate it by clicking [Go to the web interface] button at the lower right after WorldCard Team service successfully ran.



Chapter 5 Activate WorldCard Team Service

5.1 Register WorldCard Team

Following the previous chapter, when clicking [Go to the web interface], the WorldCard Team's initial registration page will open, please follow the instructions to fill in the Activation Code, the Email Address of administrator, and your Company's Information, and **then continue to fill in the User Name and login password of Administrator.**

The screenshot displays a two-step registration process for the WorldCard Team service. The interface is split into two panels, each with a blue header and a light blue body.

Step 1. Activate WorldCard Team Server. This panel contains the following fields:

- Activation code: A field with a dropdown arrow.
- Admin Email: A text input field with a dropdown arrow.
- Confirm Email: A text input field with a dropdown arrow.
- Company name: A text input field.
- Phone: A text input field.

Below the fields, there are notes:

Notes :
1. If you have purchased the WorldCardTeam product, please find the "Software Startup" card in the box and enter the activation code and related information to obtain authorization to get started.
2. If you do not have a WorldCardTeam product activation code, please contact us.

Step 2. Set admin password. This panel contains the following fields:

- User name: A text input field with a dropdown arrow.
- Password: A text input field with a dropdown arrow and an eye icon.
- Confirm password: A text input field with a dropdown arrow and an eye icon.

Navigation arrows (blue < and >) are located between the two panels.

5.2 Create User Accounts

Before you create any user, you have to decide to either let different users has their own permissions to share specific information, or just let all users reach all the shared information. When you create a user, you can set the user as General account or Read-Only account, and connect this user with his supervisor if there is any. After setting up, the different users will have different access permissions.

Please enter the first account information that is to be established, and set the level of the account, as well as the permissions and functions the account can be used; If you allow a user to export the contact data, or allow a user to help others to scan business cards (special feature on PC version), please choose the related options to enable. After finishing adding the first user, click  to add more users to complete the whole activate process.

If you want to delete the account which is created by mistake, please click  on the account picture to delete.



Step3. Permission settings

- * Standard sharing
 - Standard sharing mode:
 - administrators can access company-wide data
 - Superior can view Subordinates' data
 - Based sharing settings, users can view other users shared data.
- Company-wide sharing
 - All contacts has been shared, each account can view the company-wide contacts.

Step4. Add user

Account:

Display Name:

Role:

Superior:

Account abil... ☒ Export

☐ Scan business card for colleagues

☒ Print

Notes: 1. The default password is "000000"
2. Scan business card for colleagues and print function, only supports Windows / Mac edition.

Amount of users: 1/10

Note:

1. The default password for the new user is "000000". When the user first logs in, the system will ask the user to reset the password.
2. All user settings can be modified in the [Manage Accounts] section of WorldCard Team settings, you may refer to Chapter 6.2.
3. Read-only users can add / edit their own contact data, but for [Shared Contacts] data, they can only view it, they cannot be download and edit it.

5.3 Start to Use

WorldCard Team settings can only be changed by administrator logging in on the web page. When the activation is complete, you will see the URL of the WorldCard Team server on the screen. Click [Start] button or enter the URL in the browser to launch WorldCard Team web page.

Congratulations, you have completed the basic settings of WorldCard Team.

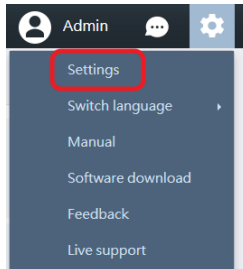
WorldCard Team Server
<http://localhost:9080>
<https://localhost:9443>

For details, please refer to Manual

1. If you want to use the APP, please go to App Store or Google play to download WorldCard Team App.
2. If you want to use PC application, Please go to PenPower website to download and install WorldCard Team software.

Note: The port of the WorldCard Team service is 9080 (http) and 9443 (https). If you want to access manually or provide a URL for any user, please add [: 9080 or: 9443] after the URL to connect correctly.

After opening, please enter administrator account / password to log in. After that, we recommend you to watch the tutorial to quickly understand the functions; Then please click the  icon on the upper-right corner of screen, and choose [Settings] to enter WorldCard Team Settings.



In the settings, you can use the user account management, or adjust the data sharing settings, or add some customized fields according to the whole company's needs, if you want WorldCard Team users to connect to your company CRM system like Salesforce, please set up here.

If you want to adjust any system-related settings for the WorldCard Team server, go to the System Settings section and click the [System Settings] tab. Click the [Go to WorldCard Team Server Management Interface] button to enter WorldCard Team server system. The login account is [admin], and the password is what you set in the initial step previously. For details, please refer to chapter 3.

If you want to expand the maximum number of user accounts, please click  button in the [System Overview] section to purchase more license, and then click  button to enter the activation code to update.

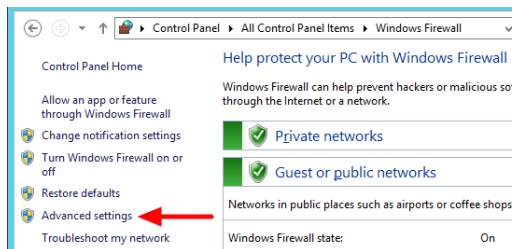
Please refer to the Chapter 6 for a variety of setup instructions for WorldCard Team.

5.4 Firewall Settings

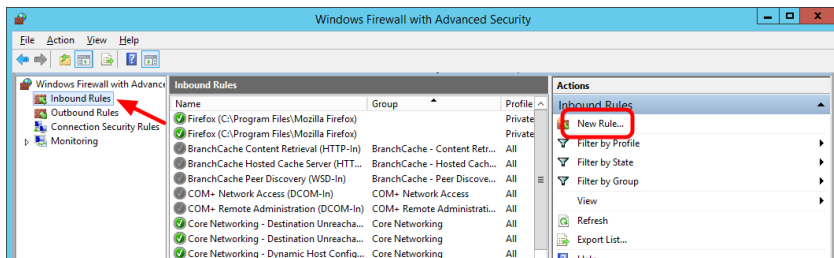
Because WorldCard Team Service uses special connection ports, you have to set up the firewall to open those ports for users to connect.

The following instruction is based on the system's firewall, please set up the system firewall, router firewall and so on according to your company's equipments.

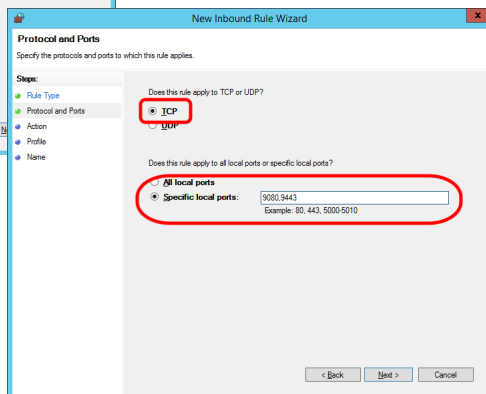
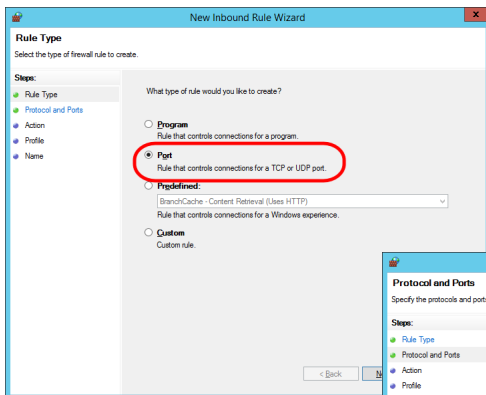
1. First of all, please open [Windows Firewall], and click [Advanced settings] on the left.



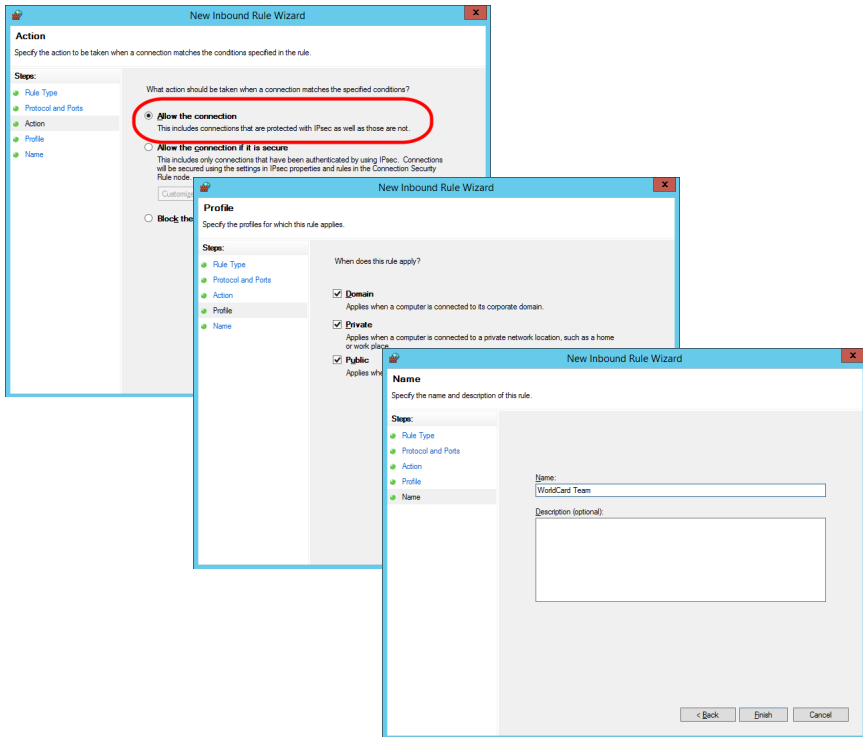
2. Click [Inbound Rules] on the left, then click [New Rules] on the right.



3. Select [Port], and select [TCP] option in the next step, then fill in the ports at [Specific local ports] that used by WorldCard Team, such as [9080, 9443].



- Then select [Allow the connection], and tick the types of connection that to be applied to this rule in the subsequent steps, and also the name for this rule for future identification.



- In the last, in the [Outbound Rules] section, add the same rule to open the WorldCard Team external connections, then the whole setup is complete.

5.5 External Connection Settings

If the users need to connect back to company to use WorldCard Team Service from any external network, please refer to the following instructions to set up:

Outbound Network Uses Fixed IP

- No matter using IP address or URL to login WorldCard Team service, please pay attention on the internal IP and external IP conversion issue. Make sure you have set the corresponding IP address of the internal WorldCard Team server on the NAT-



enabled device.

2. For the URL login, the MIS engineer can set the DNS to assign a URL for WorldCard Team server, but if the DNS setting is difficult to you, you can just using IP address to login.
3. Please note the connection ports (9080 and 9443) have to be opened in all the server and internet firewalls. For the related instructions, please refer to Chapter 5.4.

External Network Uses Floating IP

1. If your company's external network IP is floating IP, we recommend you to apply for a fixed IP, or obtain a fixed URL by applying DDNS service.
2. Please note the connection ports (9080 and 9443) have to be opened in all the server and internet firewalls. For the related instructions, please refer to Chapter 5.4.

Chapter 6 WorldCard Team Settings

6.1 Basic Operations

6.1.1 Change Password / Display Name

Click  on top right corner, and then click [Profile]. Click  on each field to make changes. If you forgot the password, click [Forgot Password] on the main screen to reset.

6.1.2 Switch Interface Language

Click  on top right corner, and then click [Switch Language] to choose interface language.

6.1.3 Back to Homepage / Sign Out

Click the word [WorldCard Team] on top left corner to go back to Homepage; to sign out, click  on top right corner, and then click [Sign Out].

6.2 Admin Settings

WorldCard Team settings can only be changed by administrator logging in on the web page, and then click  on the upper-right corner of screen, and choose [Settings].

6.2.1 Manage Accounts

Here you can click the icons on the toolbar to add  or edit  user account, if any user forgot the password, please click  to reset the password back to 000000 and inform the user to log in as soon as possible to reset the password, or you can tell the user to click [Forgot Password] button on the login page by themselves to reset password.



Reminder: When creating accounts, please make sure you enter the correct Email address, to prevent users can not be logged in properly.

Add user

Account:
Email

Display Name:
User name

Role:
General

Superior:
None

Account ability:
☐ Export
☐ Scan business card for colleagues
☐ Print

Notes:
1. The default password is "000000"
2. Scan business card for colleagues and print function, only supports Windows / Mac edition.

OK Cancel

If the user account is created by mistake, if this account has never logged in, you can easily click to delete it. But if this account has already logged in before, it cannot be deleted, you can only click to set this user account as inactive user. If the owner of this user account has no longer in the company, you can also set the account as inactive.

Once the user account is set as inactive, it cannot be activated again, and the contact data belongs to this user account cannot be deleted by this user account as well; If you need to transfer those contact data to new employee, please click [Inactive User] tab, and click icon on the toolbar to inherit those contact data to the new user account (employee) who is going to take over this job, and the owner of those contact data will be changed immediatly to that new employee; Or you can click to change the data owner one by one, and the new user will be able to continue use the data.

Tips: All the shared contact data that shared by of the disabled user account can be continued use and be continuously used and updated by the users who get shared.

6.2.2 Import Account from AD Server

WorldCard Team also supports the quick import of accounts from an Active Directory Server, for you to quickly create accounts.

Click on the quick toolbar, and then enter the AD server information that to be imported (server address, server account and password, Base DN), click OK, then you

can read the account information.

If you do not know the connecting information of the AD server you want to import, please refer to the Appendix of this manual.

After ticking the accounts you want to import, press the button to add the accounts to the import list. To remove accounts from the import list, just click on the account and press to remove it.

Import the AD server account(10.10.11.24)

Account:

☐	Account	
☒	wct1	
☐	wct3	
☐	wct4	
☐	wct5	
☐	wct6	
☐	wct7	
☐	wct8	
☐	wct9	
☐	wct10	

☐	Account
--------------------------	---------

When the import process is complete, please edit the imported accounts to set the account's role, level and which function can be allowed, then the whole importation is done. For these imported accounts, the password to login the WorldCard Team service is the same as that settings on AD server, it will not be reset to 000000.

Reminder: The number of AD accounts that can be imported is the remaining number of accounts that you have enabled. For example, if the number of enabled accounts is 30, and 10 accounts have been manually created or imported, then the maximum number of accounts that can be imported this time is 20.

6.2.3 Sharing Rules

You already set up this during the initialization, and you can change it again here.

Standard Sharing

- Administrators can access company-wide data.
- Superior can view Subordinates' data .



- Based on sharing settings, users can view the data that shared by other users.

Company-wide Sharing

- All contacts have been shared, each account can view the company-wide contacts.

6.2.4 CRM Settings

If you want WorldCard Team users to connect to your company CRM system like Salesforce, please click [Settings] to enable.

If the administrator enables the feature to connect CRM system, click CRM Settings under General Settings, and input log in information of your CRM system. You can manually export contacts to CRM systems, or have WorldCard Team synced with CRM. WorldCard Team will sync with CRM system every 10 minutes if the sync function is on.

6.2.5 Custom Field

WorldCard Team provides field customization feature, you can add up to 16 customized fields. Please click  to add new field. and then enter the field title and field property to complete.

There are 7 properties for custom fields:

1. Text: Can fill in texts and symnols.
2. Email: Can only fill in the data with Email format.
3. Picklist: Customize menu content to allow users to select, the menu item limitation are 10.
4. Number: You can only enter integer numbers.
5. Floating-point Number: You can enter a value that contains a decimal point.
6. Date: Add date.
7. Date Time: Add date and time.

Reminder: *In the contact edit screen, if the input box frame is displayed in red, it means that the input data format is not accepted, please check and correct.*

6.2.6 System Overview

Here you will see information about the current usage of the WorldCard Team server, including how many users and how many contacts, and more. To add more user licenses, please click  to purchase, and then click  to activate.

Reminder: If your administrator account is imported from the AD server, and the AD account does not have Email information, WorldCard Team will remind you to add Email information in [Personal Information] in order to increase the authorization when adding authorization.

6.2.7 Certificate Information

This page displays the SSL certificate information of the https protocol that WorldCard Team server uses. If you need to change it, please open [WorldCard Team Control Tool] to change.

6.3 General Settings

6.3.1 Share Settings

Here you can choose whether you want to automatically share the new added contacts with the specific users or not. When Share Settings function is turned on, newly added contacts will be shared with the specified users. Click  to remove users from the sharing list.

For detailed information regarding Share Settings, please refer to Chapter 2.2.4 of [Web User Manual].

In addition, you can click the [Clear the contacts never being downloaded by any user] button to delete the contacts that belong to you but never downloaded by anyone, and this can let you save more useful information.

6.3.2 Display Settings

Under [Display Map of Address], you can choose an online map to display the address of contacts.

- **Auto:** System selects map basing on contact country information. Baidu map for China; Google map for other countries.
- **Google Map:** To display address on Google Map



- **Baidu Map:** To display address on Baidu Map.

Under [Display Name Settings], you can decide the display order of first Name and last Name. Eastern names and western names can have different settings.

6.3.3 CRM Settings

WorldCard Team can work with CRM systems. If the administrator enable the feature to connect CRM system, click CRM Settings under General Settings, and input log in information of your CRM system. You can either manually export contacts to CRM systems, or have WorldCard Team synced with CRM. WorldCard Team will sync with CRM system every 10 minutes if the sync function is on.

6.4 Notification

You will receive notification when someone shares a contact with you, or WorldCard Team settings have been updated. Click  on the top right corner of the main screen to review messages.

Messages from the system or other users can't be deleted manually. The system has a limit of 500 messages to display. Once it reaches the limit, the oldest messages will be automatically deleted by the system.

If you are notified that someone shared a contact with you, you will see the key information of the contact in the notification, including name and company. You can select the contact and click  to download the contact to [My Contacts].

Note: You can click Date / Sharer / Description on top of the screen to sort your notification messages.

Chapter 7 WorldCard Team Applications Installation

© Windows

To install WorldCard Team application, please open web browser and access (<http://download.worldcardteam.com/>) to open download page, then click [WorldCard Team (Windows)] to download. When the download is finished, please double click it to start install.

After installing and launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

© Mac

To install WorldCard Team application, please open App Store  in Mac system, and enter [WorldCard Team] in the upper-right search bar to search.

Click [Get] button, and enter your Apple account / password to start download. When the download is finished, you will be able to find WorldCard Team application in [Applications].

After launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

© iOS / Android

To install WorldCard Team app, please open App Store / Google Play in your iOS / Android device, and search [WorldCard Team] to download and install.

Or you can read the QR code below to access the download page:

iOS



Android



After downloading and launching the WorldCard Team app, please enter the WorldCard Team server URL and your account / password to log in.

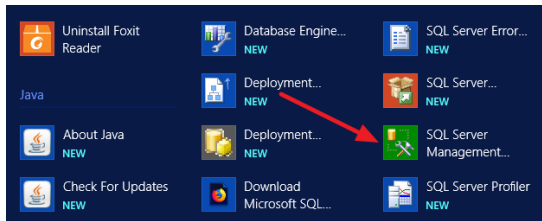
** Reminder: You are advised to log out WorldCard Team to reduce server's loading if you are not accessing it.*

Chapter 8 Database Backup / Restore

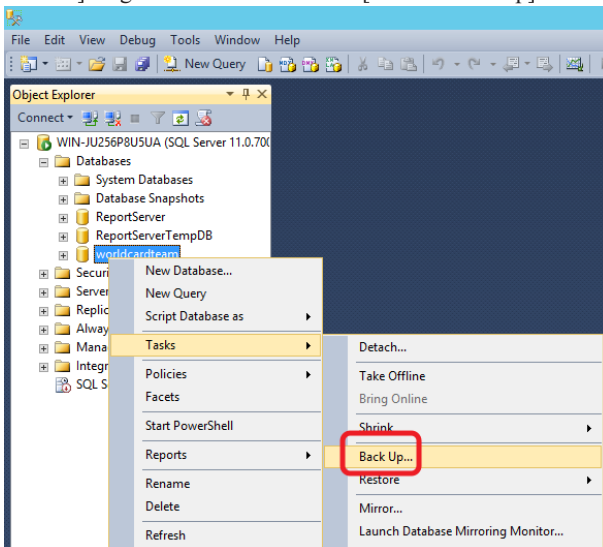
8.1 Back up Microsoft SQL Server Database

To back up WorldCard Team's database of Microsoft SQL Server, please follow these steps:

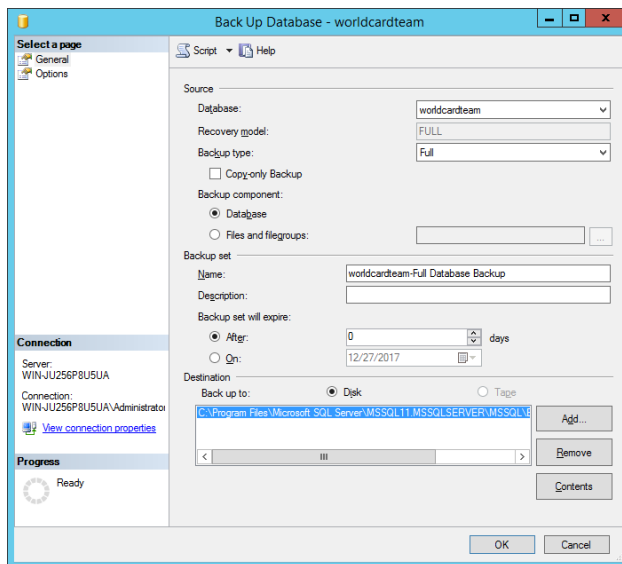
1. Please open [WorldCard Team Server Control Tool] and stop the WorldCard Team service.
2. Click [SQL Server Management Studio] in [Applications] to open the console and login with Administrator or sa account.



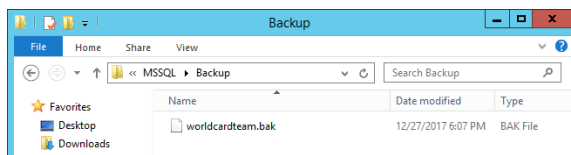
3. Expand [Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click on it and select [Tasks \ Back Up].



4. After confirming the path to save the backup file, click the [OK] button to start the backup.



5. After the backup is complete, you can see the file appears in the destination folder your assigned.

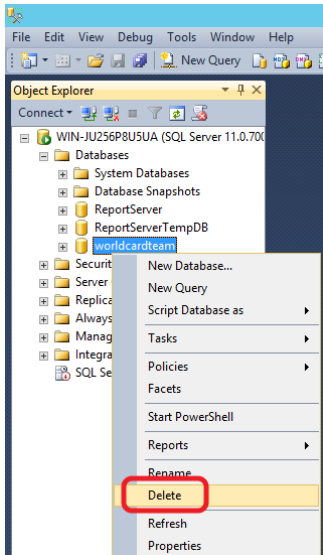


6. At last, remember to back up the business card images. The business card image's location is where you set in [WorldCard Team Control Tool] previously. Please note to back up the entire business card image folder, and do not change the folder name and structure of it, once any different from the current setting, the card images will not be loaded after restoration. For example, if the path for storing business card images at that time is set to: D:/Card Image, and the whole [Card Image] folder needs to be backed up with the database intact.

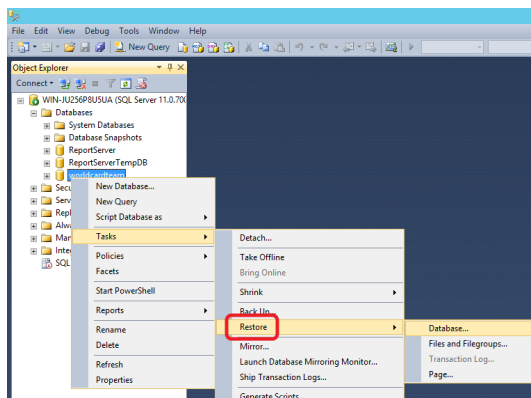
8.2 Restore Microsoft SQL Server Database

To restore WorldCard Team's database of Microsoft SQL Server, please follow these steps:

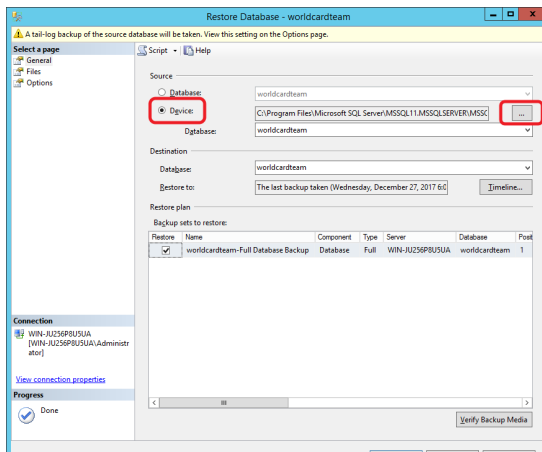
1. Click [SQL Server Management Studio] in [Applications] to open the console and login with Administrator or sa account.
2. Expand [Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click on it and select [Delete] to delete the current database that you don't want to use anymore; If you are willing to restore on the new server, please skip this step.



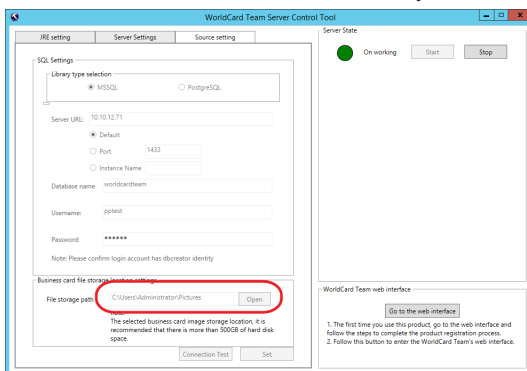
3. Right-click on [Database] in the left pane and select [Tasks \ Restore \ Database].



4. Select [Device] in [Source] section, and browse the database backup file in this computer, and click [OK] to restore.



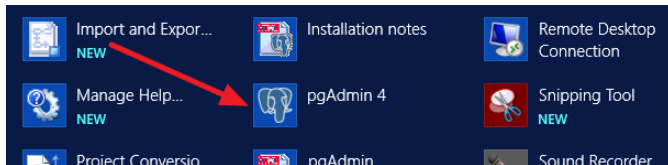
5. After the restore is complete, please copy the business card image folder which was backed up with the database, and paste to the new location on this server. Please note do not change the folder name and structure of the business card image folder, once any different from the original setting, the card images will not be loaded after restoration. For example, if the entire folder name you backed up is [Card Image], you have to move the entire [Card Image] folder to the new location.
6. Last step, please open the [WorldCard Team Control Tool], and select [File Path] under the [Source Setting] page, then assign the path to the business card image folder you just placed, and then run the WorldCard Team service to confirm that the business card information and user information are correctly loaded.



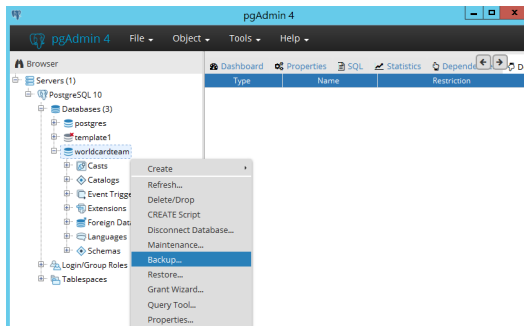
8.3 Back up PostgreSQL Database

To back up WorldCard Team's database of PostgreSQL, please follow these steps:

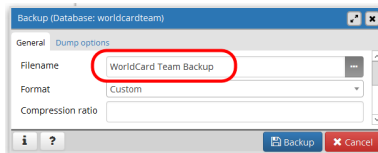
1. Please open [WorldCard Team Control Tool] and stop the WorldCard Team service.
2. Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].



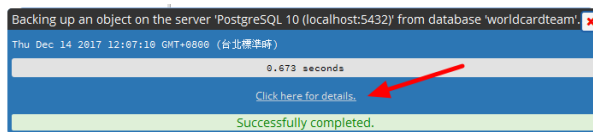
3. Expand [Server \ PostgreSQL 10 \ Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Backup].

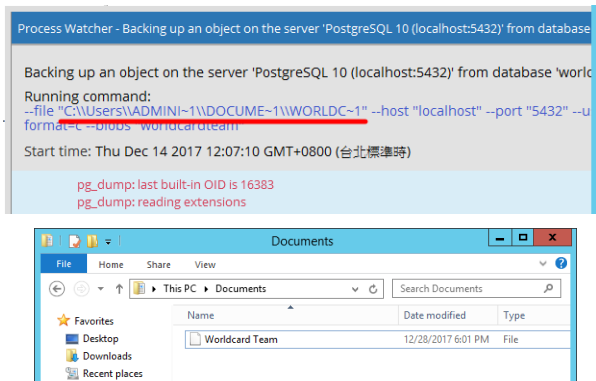


4. Enter the backup database file name for future to identify, and click the [Backup] button, it will start the backup.



5. After the backup is complete, the backed up database file will be stored in the [Documents], if you want to check the correct path, you can click [Click here for details] wording on the popped message.



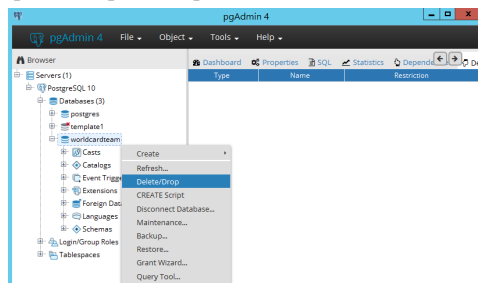


- At last, remember to back up the business card images. The business card image's location is where you set in [WorldCard Team Control Tool] previously. Please note to back up the entire business card image folder, and do not change the folder name and structure of it, once any different from the current setting, the card images will not be loaded after restoration. For example, if the path for storing business card images at that time is set to: D:/Card Image, and the whole [Card Image] folder needs to be backed up with the database intact.

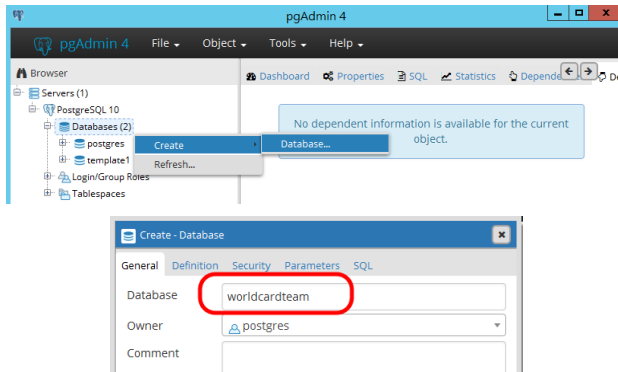
8.4 Restore PostgreSQL Database

To restore WorldCard Team's database of PostgreSQL, please follow these steps:

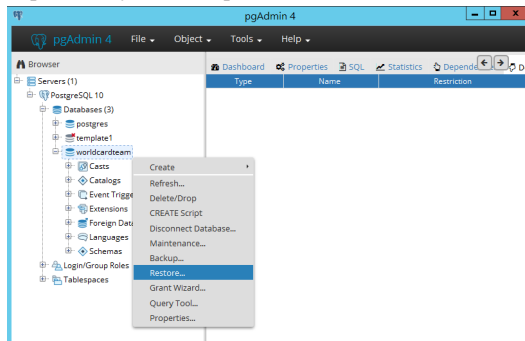
- Go to the PostgreSQL console by clicking [pgAdmin4] from [Applications].
- Expand [Server \ PostgreSQL 10 \ Databases] in the left pane and locate WorldCard Team's database [worldcardteam]. Right-click and it select [Delete] to delete the current database that you don't want to use anymore; If you are willing to restore on the new server, please skip this step.



- Right-click on [Databases] in the left pane, select [Create \ Database], and set the new database name to the same [worldcardteam].



- Once created, right-click on the new worldcardteam database and select [Restore], then select the previously backed up database file to restore.



- After the restore is complete, please copy the business card image folder which was backed up with the database, and paste to the new location on this server. Please note do not change the folder name and structure of the business card image folder, once any different from the original setting, the card images will not be loaded after restoration. For example, if the entire folder name you backed up is [Card Image], you have to move the entire [Card Image] folder to the new location.
- Last step, please open the [WorldCard Team Control Tool], and select [File Path] under the [Source Setting] page, then assign the path to the business card image folder you just placed, and then run the WorldCard Team service to confirm that the business card information and user information are correctly loaded.



WorldCard Team Server Control Tool

IRE settings | **Server Settings** | Source setting

SQL Settings

Library type selection

☐ MySQL ☒ PostgreSQL

Server URL: localhost Port: 5432

Database name: worldcardteam

Username: postgres

Password: *****

Business card file storage location settings

File storage path: C:\Users\Administrator\Pictures

The selected business card image storage location, it is recommended that there is more than 500GB of hard disk space.

Server State

☒ On working

WorldCard Team web interface

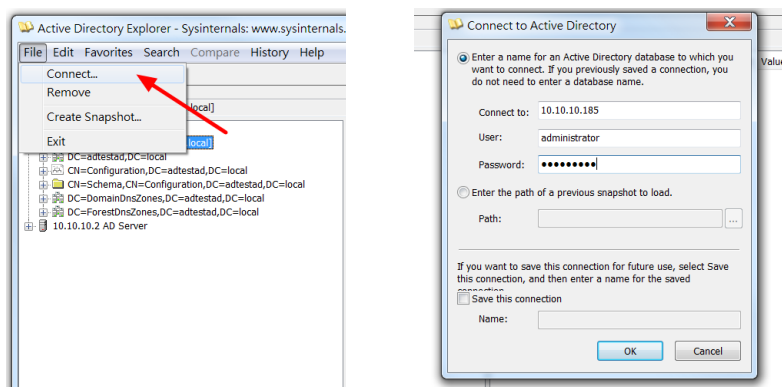
1. The first time you use this product, go to the web interface and follow the steps to complete the product registration process.
2. Follow this button to enter the WorldCard Team's web interface.

Appendix: Connecting Information of AD Server

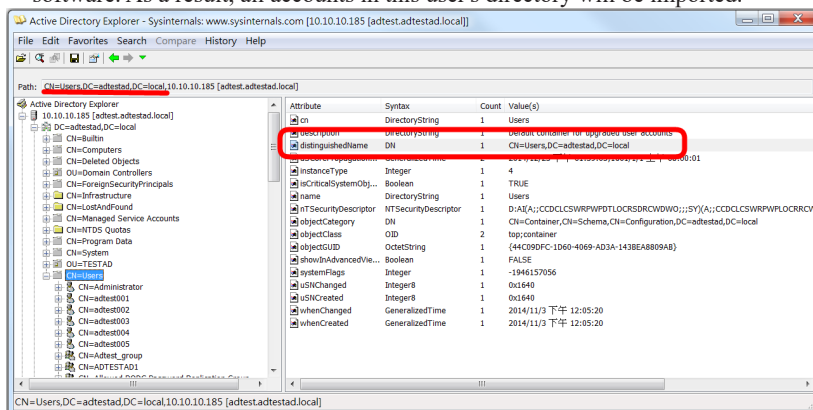
If you are not clear with the connecting information of AD server, please refer to the instructions below:

1. Access the URL below to download and install the free AD Explorer tool of Microsoft: <https://technet.microsoft.com/en-us/sysinternals/bb963907.aspx>
2. Execute "ADExplorer.exe", and Click [File] \ [Connect], and enter the IP address/ Account/password of your company's to connect.

Reminder: This IP address/Account/Password are the required information to fill in when you import the AD accounts to WorldCard Team.



3. Then in the left pane, expand the user directory under the server. As shown in the following image, find the [DistinguishedName] item in the user directory. The value of this item is [BaseDN], which is the information to be filled in WorldCard Team software. As a result, all accounts in this user's directory will be imported.



WorldCard Team - Windows Server Edition

v1.2 Administrator Manual

Manufacturer: PenPower Technology Ltd.

Release: March, 2018