

WorldCard Team

Web User Manual

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Relesae: December, 2017

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This device has been shown to be in compliance with and was tested in accordance with the measurement procedures specified in the Standards and Specifications listed below.

Technical Standard: EMC DIRECTIVE 2014/30/EU (EN55032 / EN55024)

FCC Statement

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to Part 15 of the FCC Rules. These limits are designed to provide reasonable protection against harmful interference when the equipment is operated in a residential installation and used in accordance with the instruction manual may cause harmful interference to radio communications. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause harmful interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encourage to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or and experienced radio TV technician for help.

Notice: The changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate the equivalent.

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对于仅适用于在海拔2000m以下地区使用的设备应在设备明显位置上标注“仅适用于海拔2000m以下地区安全使用”或类似的警告语句，或如下标识：



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注 意

用错误型号电池更换会有爆炸危险
请务必按照说明处置用完的电池。

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取扱説明書に従って正しい取り扱いをして下さい。VCCI-B

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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

- Update login window.
- Correct the behavior of deleting contacts.

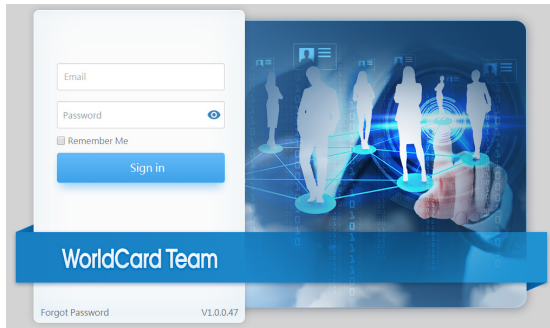
v1.0.0

- Year 2017, first version.

Chapter 1 Log in and Settings

1.1 Log in WorldCard Team

Open a browser on your computer; go to the webpage of WorldCard Team, input account and password to log in. WorldCard Team web version provides faster performance, with fewer features compared to PC client or mobile apps.



Note: Please contact the administrator to obtain log in information: webpage and account name; default password is 000000, please change your password after the first login.

Recommended Browsers: Internet Explorer 11/ Edge / Chrome/ Firefox / Safari / QQ / Sogou.

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

1.2 General Settings

We recommend you to personalize the settings after first log in.

1.2.1 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.

1.2.2 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].

1.2.3 Switch Interface Language

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

1.2.4 Share Settings

Click  on top right corner, and then click [Settings], you will see [Share Settings] in the side menu.

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 2.2.4.

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.

1.2.5 Display Settings

Click  on top right corner, and then click Settings, you will see Display under General 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.

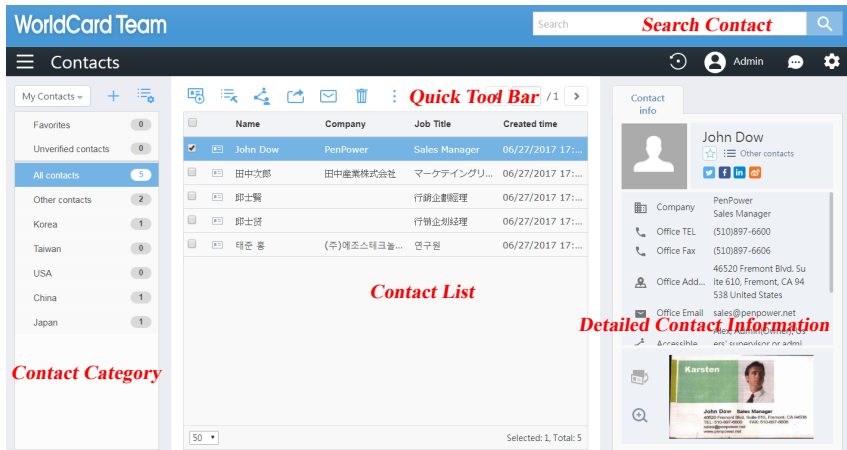
Under [Display Name Settings], you can decide the display order of first Name and

last Name. Eastern names and western names can have different settings.

1.2.6 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 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.

Chapter 2 Getting Started



2.1 Add / Edit Contacts

2.1.1 Add Contacts

New contacts can be added manually on WorldCard team web version. Click  from quick tool bar to add new contacts.

If the new contact is from the same company with an existing contact, click  from quick tool bar, then click [Add Contact – from the same company], the company information will be auto filled to the new contact.

2.1.2 Edit Contacts

To edit a contact, click  from the quick tool bar, then click [Edit]. You can also double click a contact from Contact List to edit. Under edit mode, you can use  /  to add or remove fields, and click  can arrange the order of the fields.

Note: If the input field turns red during editing, please check the information and correct the error.

Edit Category / My favorite

The contact category can be changed on the contact list page. On the right side of the screen, click  **Other contacts** under the contact name to change the category. You can also click to open each contact from the contact list, and click the same icon to edit category. The default category setting is Other Contacts. It is recommended to categorize each new contact for future convenience. Please refer Chapter 3 for more details.

Click  under a contact name to add it to Favorites; click  to remove a contact from Favorites.

Edit Profile Picture or Business Card Image

Click  to upload profile picture. The picture file size must be less than 1MB.

Click  to enlarge business card image to review. If you want to replace an existing image or add rear side image of a business card, click the same image area to upload. Click  can delete the image.

Accessible Users (Share Contacts)

If you want to share a contact with other users, you can add their information to the Accessible users filed, it equals to share a contact to this user. Please refer to Chapter 2.2.4 for detailed information.

2.1.3 Delete contacts

Click  from the quick tool bar to delete contacts. Please note, under Shared Contacts, only the owner of a contact and administrator have the right to delete it. However, if other users downloaded the contact information, then it can not be deleted. Please inform the users who downloaded the contact information to delete first, then you will be able to delete afterwards.

Tips: Press and hold Shift or Ctrl, then click the left Mouse button to select multiple contacts.

2.2 Utilizing Contact Information

Icons from quick tool bar and under each contact give you easy access to many functions.

2.2.1 Open website of a contact/Address Map

Next to the contacts list, under each contact, you can click the address to display the address on a map. Click the website to open it in a browser.

2.2.2 Email Contacts

Click  from the quick tool bar, or click email address under each contact to send emails to your contacts.

2.2.3 Search Contacts on Social Media

Twitter/Face Book/LinkedIn/Sina WeiBo icons are available under each contact. You can click     icons to search your contact on social media.

2.2.4 Share Contacts

WorldCard team users can only access to contacts which they are authorized to. The access right will be defined by the administrator. Normally supervisors will have access to team members' contacts, but the team members won't have access to supervisors' and each other's.

If you want to share contacts with other users, you can click  from the quick tool bar. You can also open a contact, then click  and add user names to the Accessible users field to share contacts.

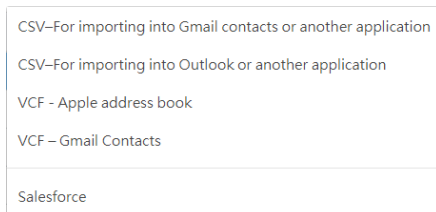
The users you selected to share contacts to receive the notification and will be able to view the contacts, under your name in the [Shared Contacts] area. Please refer to Chapter 2.3 for more details about [Shared Contacts].

Note: When you share contacts with other users, their supervisors will also be able to see the contacts.

Note: The sharing feature applies to each single contact, and you can't undo it once a contact is shared. For example, after you shared a contact with A, you can't prevent A from viewing the contact. And A will only be able to see this particular contact, not other contacts in your contact list which are not shared.

2.2.5 Export Contacts

Click  from the quick tool bar to manually export contacts to your CRM system. Or export contacts to CSV/vCard file for future use. More exporting format is supported by WorldCard Team PC client; please refer to PC client user manual for more information. For CRM settings, please refer to Chapter 1.2.6.



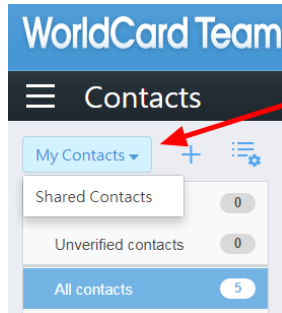
2.2.6 Search Contacts

Input keyword to the search bar, top right corner, then click  to search related contacts. Click [My Contacts] and [Shared Contacts] on top left corner to switch search target area.

Click [Close] to go back to the main screen once search is done.

2.3 Shared Contacts

When other users share contacts with you, the contacts will be available under [Shared Contacts], as shown in the picture below, and you can switch between My Contacts and Shared Contacts.



Contacts under [Shared Contacts] are shared by users, and can't be edited directly. Please click  from the quick tool bar to download contacts from [Shared Contacts] to [My Contacts], and then you can edit the downloaded contacts. When you download a contact and edit it under [My Contacts], the original contact under [Shared Contacts] will be updated too. If other users have downloaded the same contact, their record will be updated as well.

 means a contact hasn't been downloaded yet.  means a contact has been downloaded. You can also click  to share a shared contact with other users, and their supervisor will be able to review it too.

Note: *In Accessible Users field, you can see the owner of a contact, and all other users who have access to the contact.*

Note: *If a contact has been shared a few times among different users, the owner displayed is still the original owner. For example, A, the owner shared a contact with B, and B shared the contact with you, you need go to A under the Shared Contacts to see the contact.*

2.4 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 displaying 500 messages. 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 3 Category Management

3.1 Add / Edit Category

You can add categories under My Contacts to manage your contacts.

Click  in the contacts category area to add a new category, input category name and click [OK] to finish.

If you want to edit any category, click  to open edit window, in here, you can add, delete, rename or sort categories.

Note: *Deleting a category won't delete the contacts under the category. The contacts will be categorized as [Other Contacts].*

3.2 Edit Category

To manage contacts efficiently, it is recommended to categorize all new contacts.

Besides the methods mentioned in 3.1, you can select contacts and then click  from the quick tool bar to edit categories. You can also open a contact, and then click the current category to edit it. The category is above the profile photo.

If you add a new contact under certain category, the contact will belong to the category automatically. So if you need to add a contact that doesn't belong to any category, please add it under [Other Contacts] category.

Note: *A contact can have multiple categories in WorldCard Team system. For example, contact A can be categorized as friend and coworker at same time.*

Tips: *You can drag a contact with left button of the mouse, and drop it to a different category folder to change the category quickly.*

WorldCard Team v1.2 Web User Manual

Manufacturer: PenPower Technology Ltd.

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