

# **WorldCard Team**

## **Administrator Manual**

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

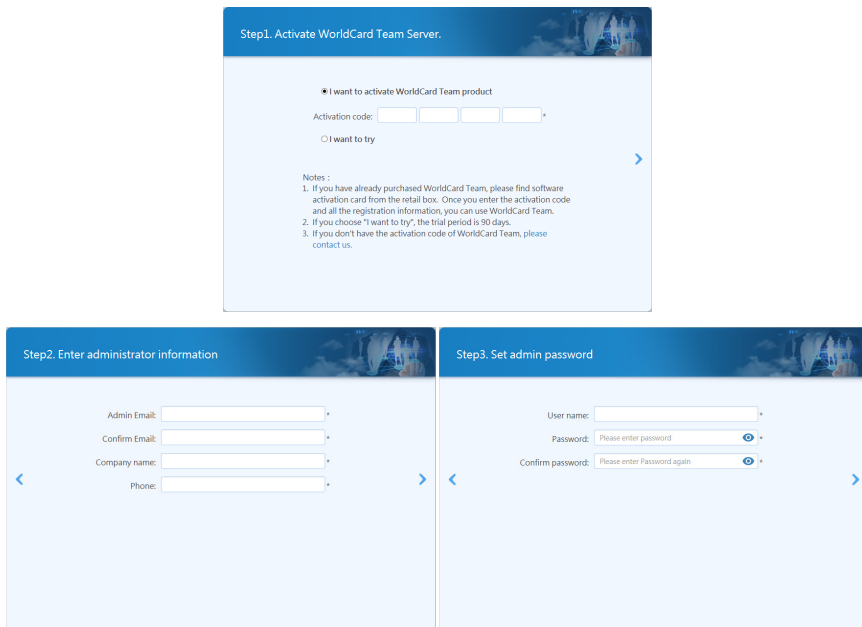


# Chapter 1 Activate WorldCard Team Service

## 1.1 Register WorldCard Team

After the WorldCard Team installation is complete, there will be a WorldCard Team shortcut  on the system desktop, please click it to open, and follow the instructions to choose for trial, or 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.**

**Note:** *WorldCard Team service will be fully operated after about 3 minutes of installation, if you can not see the register screen, please try again later.*



**Step1. Activate WorldCard Team Server.**

☒ I want to activate WorldCard Team product  
 Activation code:       
☐ I want to try

Notes :

1. If you have already purchased WorldCard Team, please find software activation card from the retail box. Once you enter the activation code and all the registration information, you can use WorldCard Team.
2. If you choose "I want to try", the trial period is 90 days.
3. If you don't have the activation code of WorldCard Team, please contact us.

**Step2. Enter administrator information**

Admin Email:   
 Confirm Email:   
 Company name:   
 Phone:

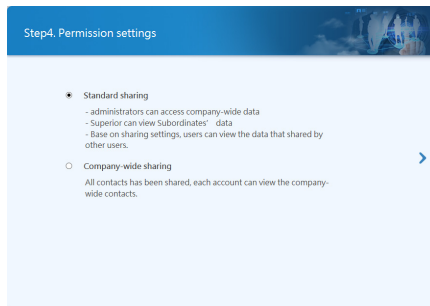
**Step3. Set admin password**


User name:   
 Password:    
 Confirm password:


## 1.2 Create User Accounts

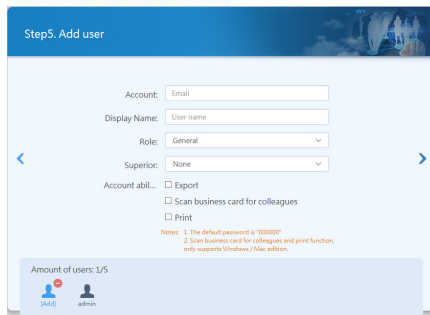
Before you create any user, you have to decide to either let different users has their own permissions to share specific information, or just let all users reach all the shared information. When you create a user, you can set the user as General account or Read-Only

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.

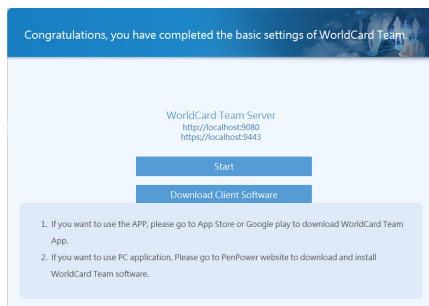


**Note:**

1. All user settings can be modified in the [Manage Accounts] section of WorldCard Team settings, you may refer to the following chapter 2.2.1.
2. 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.


## 1.3 Start to Use

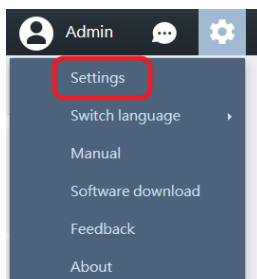
WorldCard Team settings can only be changed by administrator logging in on the web page. When the activation is complete, you will see the URL of the WorldCard Team server on the screen. Click [Start] button or enter the URL in the browser to launch WorldCard Team web page.



**Note:**



- 1. 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.***
- 2. When you set up the NAS to connect to the external network, please remember to open the 9080 (http) and 9443 (https) ports, so that users can successfully connect to the NAS to access the WorldCard Team service.***

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 [Server Management Interface] item, and click the [Server Management Interface] tab, then click [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 second chapter for a variety of setup instructions for WorldCard Team.


## Chapter 2 WorldCard Team Settings

### 2.1 Basic Operations


#### 2.1.1 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.


#### 2.1.2 Switch Interface Language

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




#### 2.1.3 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].

### 2.2 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].



#### 2.2.1 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.

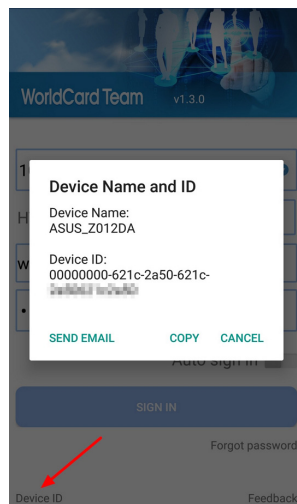
**Reminder: When creating accounts, please make sure you enter the correct Email address, to prevent users can not be logged in properly.**

If you want to restrict a user to only use Android devices or Windows computers, or even use web pages to connect, etc., please make settings in the [Allowed Platforms] project.

**Tip: Each platform can be bound to up to two devices.**

If you want to bind a device in advanced, for example, if the user requests that he wants to make sure his account will not be logged in by other device, you can ask the user to use the device that to be bound to connect, then you click  to edit the user's account, and then click  next to the platform, then the device information will list, then you can tick to bind the device.

If the user has used multiple devices to connect, in order to ensure the correct information, as shown on the right, the user can tap on the [Device ID] of the software



login screen on the device that to be bound, and provide the correct device information to the administrator via email.

If you have [External IP Connection Restriction] enabled, it is recommended that you open the [Ignore External IP Connection Settings] if possible, because the IP address of the mobile device is usually not internal to the company. For related external IP restriction settings, please refer to the following section 6.2.8.

Device binding



Device	Ignore Public IP Connection Settings
<input type="checkbox"/> ASUS_Z012DA 00000000-621c-2a50-621c-2a50621c2a50	<input checked="" type="checkbox"/>



Note:  
The "Ignore Public IP Connection Settings" function can be setup, when the "Reject Public IP connection" had been turned on in security settings.

OK


Cancel


### 2.2.2 Delete/Deactivate/Suspend User Account

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 above, 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 immediately 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.***

If the user account will be temporarily not use, click  to suspend the user account. After suspending, please note that user cannot log in (only administrator account can still be able to log in on webpage), and other users cannot share the contact data to the suspended user account.



To enable a suspended user account, click the [Pause] tab above, select the user account you want to enable, and click  to cancel the suspension.

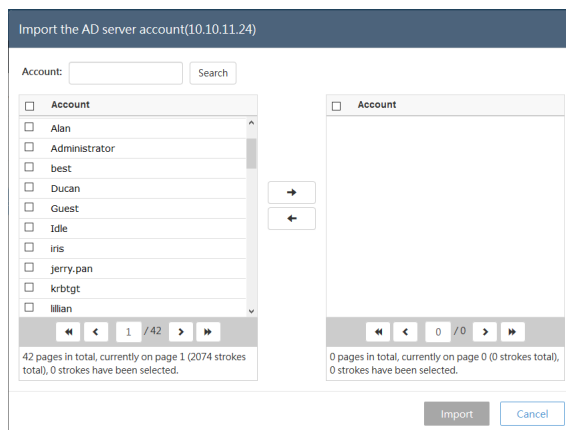
In addition, if necessary, you can enable the [Automatic Suspend Account] options at the bottom of the page. When an account meets the conditions you set (new user is not logged in within how many days, failed to log in for how many times), the account will be automatically suspended. .

## 2.2.3 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.



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 those settings on AD server, it will not be reset.



*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.*

In addition, you can use the AD account synchronization function  to automatically check account changes on the AD server. When a AD account is removed, the WorldCard Team server will suspend that account and import a new account (if there are new users on the AD server) after synchronization. If it is confirmed that the suspended user is invalid, please set it as deactivated and perform data inheritance action.

*Reminder: After enabling the automatic synchronization function, the WorldCard Team Server will automatically check the AD server 3 times a day.*

### 2.2.4 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.

### 2.2.5 CRM/Address Book Settings

In here, you can set whether to associate the user's contact information with the company CRM or company address book.


If you want WorldCard Team users to connect to your company CRM system or company address book, please select it click [Settings] to enable. If your company's Salesforce URL is customized, please select [Custom Domain] when setting it, and fill in the specific domain, so that when the users need to access to Salesforce, it will automatically connect to your company's dedicated Salesforce.

To allow accessing to the company address book (currently supports Exchange and Office 365), click [Settings] after selecting the address book system (such as Exchange),

enter the IP or URL of the Exchange server, and then click [Setting] to enable this feature.

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

## 2.2.6 Custom Field



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

There are various properties for custom fields:

1. Text: Can fill in texts and symbols.
2. URL: Can enter URL information.
3. Email: Can only fill in the data with Email format.
4. Picklist: Customize menu content to allow users to select.
5. Number: You can only enter integer numbers.
6. Floating-point Number: You can enter a value that contains a decimal point.
7. Date: Add date.
8. 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.

## 2.2.7 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.

### 2.2.8 System Management


If you want to use your company's own https certificate, please click the [Update Certificate] to upload the new certificate, after the replacement, you need to reboot the WorldCard Team server to take effect.

If you do not have a formal https certificate, you will see warnings about non-secure websites when you access your WorldCard Team webpage with your browser. You may choose to continue using (depending on the browser type, there will be different ways to allow continued use) or replace with your company's certification, then there will be no more warning message.

**Note:** *Once you set up the certification ,if you cannot use https to log in after rebooting, it means that the certificate replacement fails. Please log in as http and update the certificate again, or click [Restore Default Certificate] to continue using.*

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.

### 2.2.9 Security Settings

Enable this feature when you want to restrict users to access to the WorldCard Team server only from company's internal IP or a device with a specific external IP address. For example, if you only allow a Windows computer in the boss's home to connect, or only the branch office staffs can connect, you can click  to fill in the range of IP addresses or an IP segment that can be allowed to connect. .

### 2.2.10 Backup & Restore

The WorldCard Team system can help you back up your database. Connect a USB external storage device such as an external hard drive or a large-capacity flash drive to the USB port on the back of the WorldCard Team server. You can see the information about the USB external storage device on this page. If your USB external storage device has multiple splits slot, please select the correct slot to store the backup database in the upper right menu, and start the backup.

Backup
Restore

Please select an external device.

USB4-2

Device Information	
Total storage space :	465.44 GB
Used storage space :	383.95 GB
Available storage space :	81.49 GB

☐ OFF Automatic regular backup

weekly

Monday

12:00 PM


⊙

Last backup time : 2018/07/19 14:32:44

Start backup

## 2.3 General Settings

### 2.3.1 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.

### 2.3.2 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.


### 2.3.3 CRM/Address Book Settings

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

## 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 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 3 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.

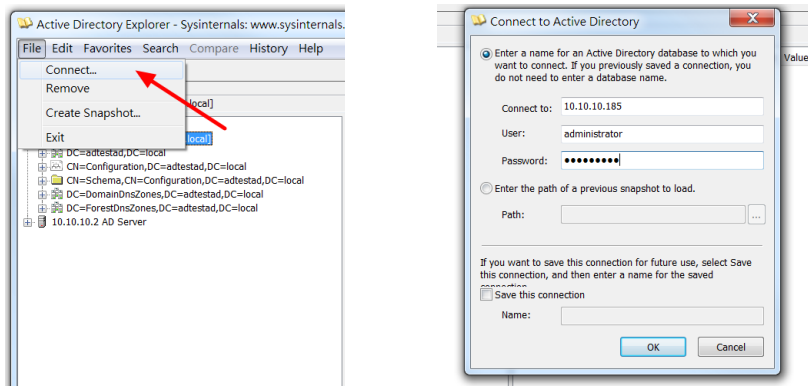
*\* Reminder: You are advised to log out WorldCard Team to reduce server's loading if you are not accessing it.*

# Appendix A: Connecting Information of AD Server

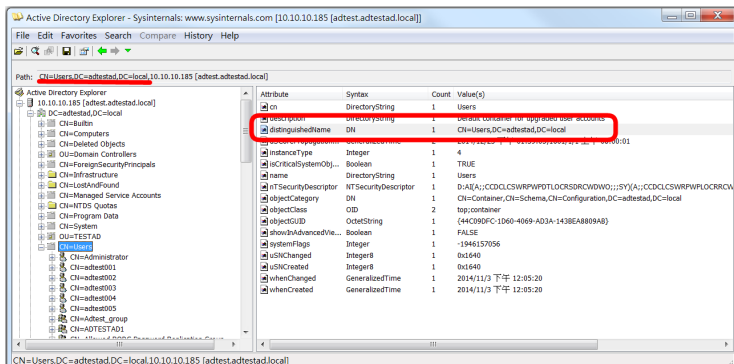
If you are not clear with the connecting information of AD server, please refer to the instructions below:

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. Please note the account must be an domain admin account.**

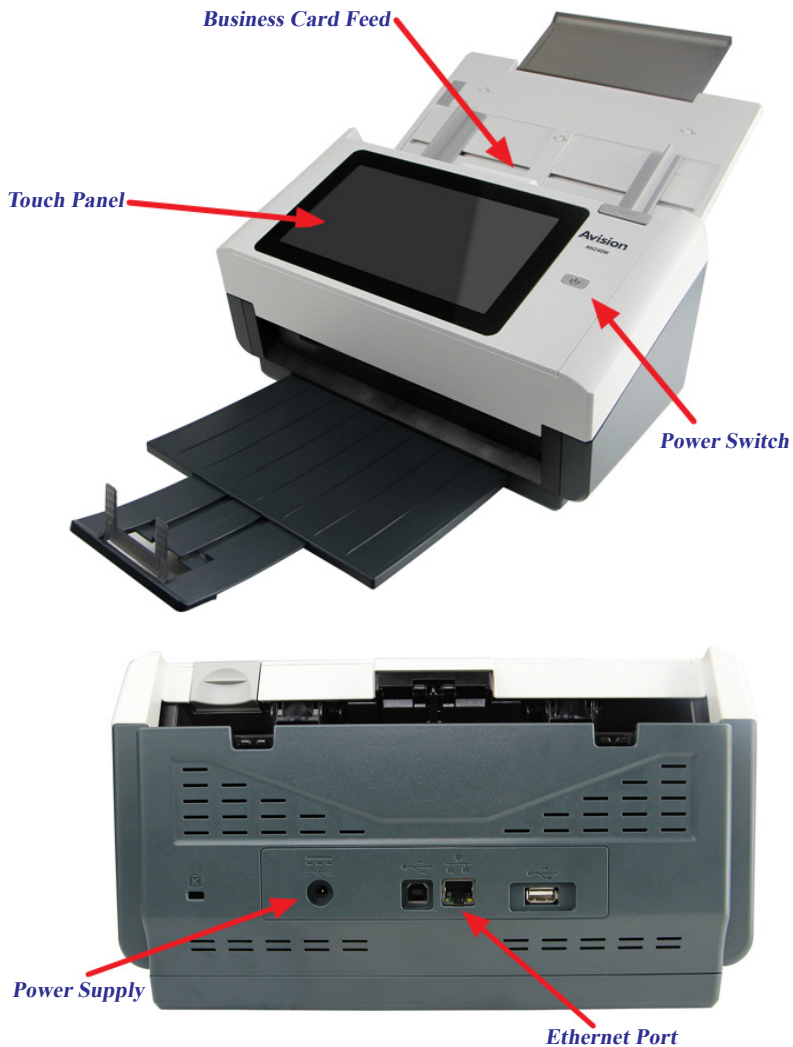


3. Then in the left pane, expand the user directory under the server. As shown in the following image, find the [DistinguishedName] item in the user directory. The value of this item is [BaseDN], which is the information to be filled in WorldCard Team software. As a result, all accounts in this user's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



## **Appendix B: AN240W Duplex Scanner Instructions (Optional)**

### **B.1 Hardware Function Introduction**





## B.2 Installation and Setup

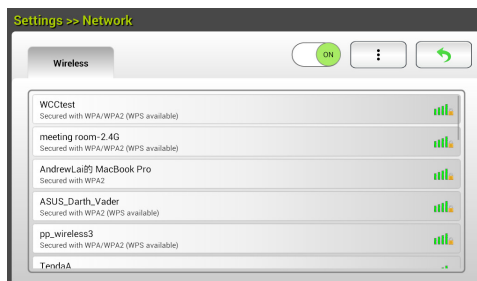
Please connect the scanner power first. To use the cable network, please connect the network cable; to use the wireless network, please refer to the subsequent wireless network settings.

**Note:** *The network that the scanner connected must be in the same local network as the WorldCard Team server.*

Please press the scanner's power button to turn it on, when the operation screen appears, it means you can start to use it. Please tap [Settings] on the left menu, then tap [Network]. Here you will see the switch between the wireless network and the cable network. Please choose one of them to continue.



To use the wireless network, tap on the wireless item to enter the connection screen, then you can select the wireless network name you want to connect.

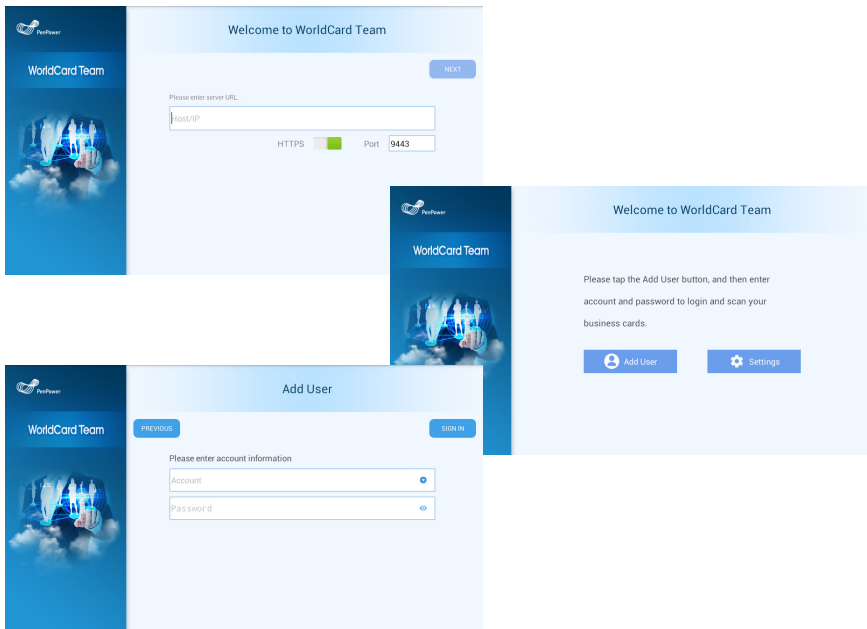


### B.3 Start Scanning Business Cards

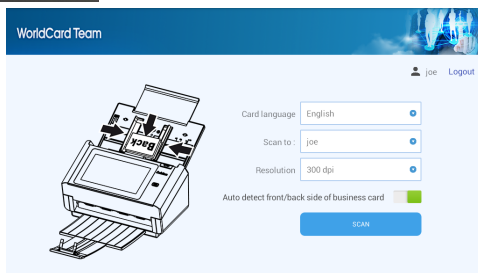
Please tap [plug-in] on the left menu and select [WorldCard Team] to open World-Card Team program.



Please enter the IP address of the WorldCard Team server in the start screen, click Next, then click [Add User] to log in to your personal WorldCard Team account.



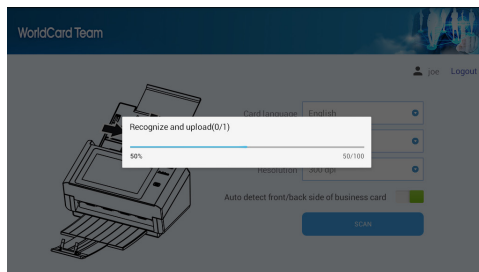
After logging in, please choose the business card language to be recognized, and the user you want to scan to (the default user you scan to is yourself), then you can put the business card horizontally into the business card feed, and tap the [Scan] to scan.



**Tips:**

1. *The flaps on both sides of the card placement can be slid and adjusted to an appropriate size, and you can do the batch scanning at one time (up to 80 sheets).*
2. *The scanner is a double-sided scanning model, so there is no need to concern placing a business card with front or back side face up.*

After scanning, the actions of recognition and uploading to the WorldCard Team server will be performed, and the whole scanning process will be finished after the upload is completed.



\* For scanning regular papers, please refer to the disc documentation included in the scanner package.

# **WorldCard Team v1.8Q Administrator Manual**

Manufacturer: PenPower Technology Ltd.

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