WorldCard Team

Web User Manual

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How long you visited our sites or used our apps and which services and features you used

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Menu

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

v1.8.0

- Add the function of verifying the card data for colleagues. Page 2-6

v1.7.0

- Add company address book access function.
- Add export to company address book function.

v1.6.0

- Suspending user become unable to log in and cannot be shared.

v1.5.0

- Add [URL] field option of User Defined Field function.

v1.4.0

- Support account suspension feature.

v1.3.0

- Add advanced search function.
- Contact category change to multi-level & multi-category.

v1.2.0

- Correct the behavior of deleting contacts.

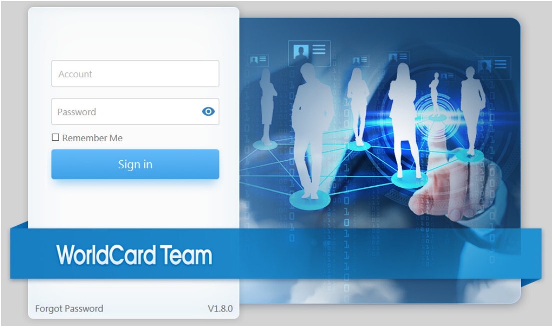
v1.0.0

- 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: If your account is set to suspend use, you cannot log in to the system, please contact the administrator; Moreover, other users will not be able to share data to suspended accounts.

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.

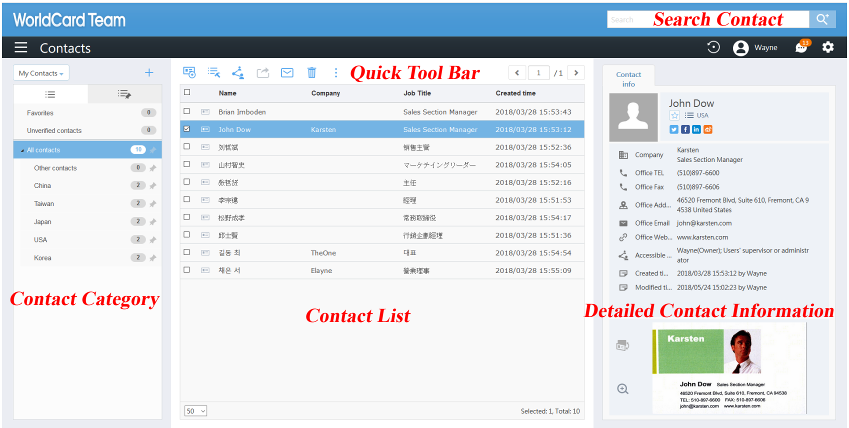
- **Auto:** System selects map basing on contact country information. Baidu map for China; Google map for other countries.
- **Google Map:** To display address on Google Map
- **Baidu Map:** To display address on Baidu Map.

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/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.

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 then 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.

If you want to save some information, please refer to the [Export Contact] of Chapter 2.2.5 to export.

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].

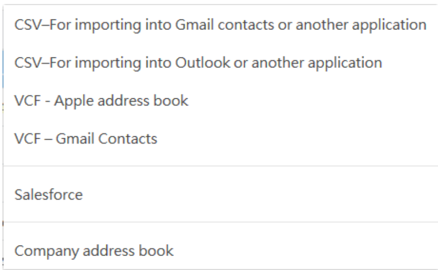
Note: When you share contacts with other users, their supervisors will also be able to see the contacts.

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

When using contacts, you can click on the quick toolbar to manually export contacts to the company's CRM system, or export them as CSV / vCard files to backup or for other applications to use; in addition, you can export contacts to company CRM or company address book. For related settings, please refer to chapter 1.2.6.

More exporting format is supported by WorldCard Team PC client; please refer to PC client user manual for more information.



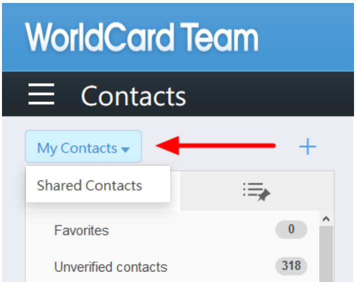
2.2.6 Search Contacts

Input keyword to the search bar, top right corner then press [Enter] to search related contacts. If you want to search for a specific contact on more precise terms, click next to the search bar and enter the conditions to search.

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.

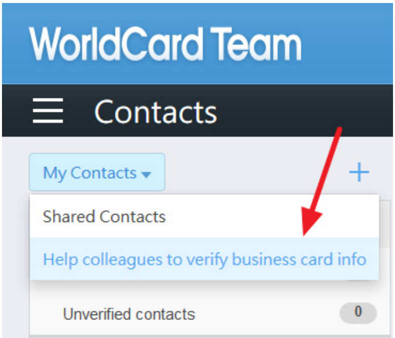
means a contact hasn't been downloaded yet. means a contact has been downloaded. You can also click to share a shared contact with other users, and their supervisor will be able to review it too.

Tip: 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 Help Colleagues to Verify Business Card Info

When your account is set to help other colleagues verify the business card data, you can refer to the figure below to pull down the menu at the top left of the homepage and switch to the area of [the colleague's scanned but not yet corrected business card data] to help him with the data proofreading action.



2.5 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

WorldCard Team supports the structure of multiple levels and multiple categories, you can add categories under My Contacts to manage your contacts.

The default categories: [All contacts], [Other contacts], [My favorites] and [Uncorrected contacts], which are not be able to delete or rename. You can use the following options to add new categories.

3.1.1 Add Main Category

1. Click on [All contacts], then click + in the contact category area to add a category. Enter the category name and press [OK] to complete.
2. Or right click on the [All Contacts] category, select [Add Category] and enter the category name.

Note: The new category name cannot be the same as the existing category name.

3.1.2 Add Subcategory

1. Select the main category that you want to add subcategory on it, and then click + in the Contact Category to add a category. After entering the category name, click [OK] to complete.
2. Or right click on the main category that you want to add subcategory on it, select [Add Category] and enter the category name.

Reminder: The upper limit of the category level is three levels.

3.1.3 Edit Category

Right click on the category, you can select [Edit Category] to change the category name, or select [Delete Category] to delete the category. If you want to move the category location, right click on the category you want to move, select [Move category location], and then click the location you want to move in the window.

Reminder: As long as there is any contact information in the category, the category cannot be deleted.

3.1.4 Pin a Commonly Used Category

There will be a button on the right side of the category menu. You can click it to pin a category as a commonly used category. In this way, you can search for a commonly used category without searching through the various categories. Just click above the category menu to switch to the pinned menu. In the category menu, you can quickly find the contact information of commonly used categories. To cancel the pinned category, just click .

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.

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