WorldCard Team

Mac User Manual

Version: v1.7

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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

v1.7.0

- Add company address book access function. Page 9-2

v1.6.0

- Change default password to "penpower".
- Add [Scan for Colleagues] item in the top left list of main screen.

v1.5.0

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

v1.4.0

- Support account suspension feature.
- Added Thai and Swedish indexing features.

v1.3.0

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

v1.2.0

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

v1.0.0

- Year 2017, first version.

Chapter 1 Getting Started

1.1 Installation

1. If you want to install WorldCard Team software on Mac system, please open App Store , and keyin [worldcard team] in the search bar to find it.
2. Click [Get] button, and enter your Apple ID / Password to start free download, after downloading, you can find WorldCard Team software in the system Application.

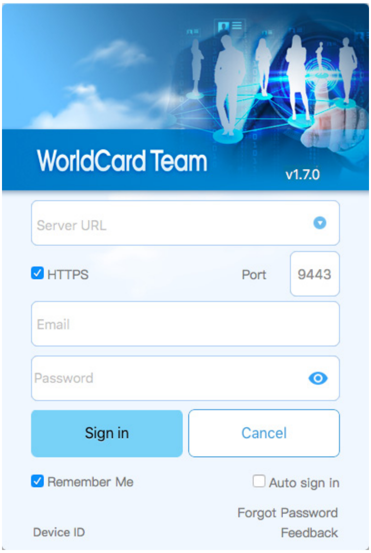
1.2 Connecting the Scanner

Please plug the USB connector coming from WorldCard Team scanner into an USB port on the computer. The scanner driver will be automatically installed.

As a notice, please be reminded to pull up the scanner in a way, as shown by below photo, so that business cards can be placed into the scanner. The light will be flashing while scanning is in progress. You may scan the next business card only if the flashing stops and the scanner stepper motor stops functioning.

1.3 Log in WorldCard Team

The system will automatically search for the available servers after WorldCard Team is launched. You may also click 🔍 to search manually. Select the server, and choose to use http or https protocol, then input your account and password to log in. If you are not sure the server location, please consult the system administrator.



Reminder:

1. ***The default login password is "penpower". Please change your password after the first login.***
2. ***If your account is set to suspend use, you can still log in to the system after the reminder messageis closed, but you can only view the simple data and you can't do anything.***

You may log out WorldCard Team by clicking on the [User Avatar Icon] on the top right part of the main screen and then select [Log Out].

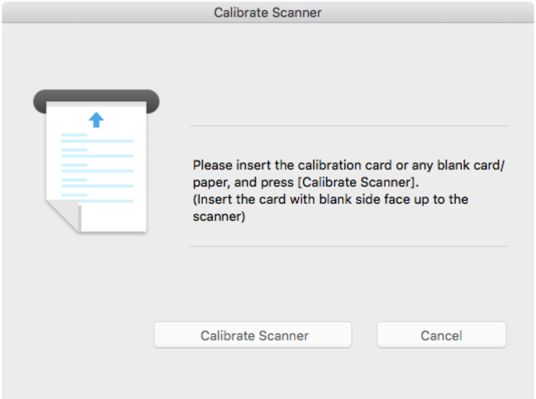
Note: One account can only log in to a computer and a smart phone at the same time. For example, after logging in to the Windows computer and logging in to the Mac computer again, the connection on the Windows side will be suspended, but the web version is not limited here.

Tips: If the administrator asks to bind the login device, or if you want your account to be logged in only on your mobile phone to avoid others using your account, please log in on the phone you want to bind first, then tap [Device ID] at the bottom of the login screen to provide the mobile device information to the administrator to confirm and bind.

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

1.4 Calibrate the Scanner

It's not required for WorldCard Team scanner to be calibrated for the first time. However it is necessary to calibrate the scanner if there is color distortion or a shaded line in the scanned image after being used for a while. You can click [Execute] / [Calibrate Scanner] and follow the instruction to calibrate.



Note: Please make sure the blank side of the calibration card is facing up when placing it on the scanner. If the calibration card is lost, you may use a piece of blank business card or paper instead.

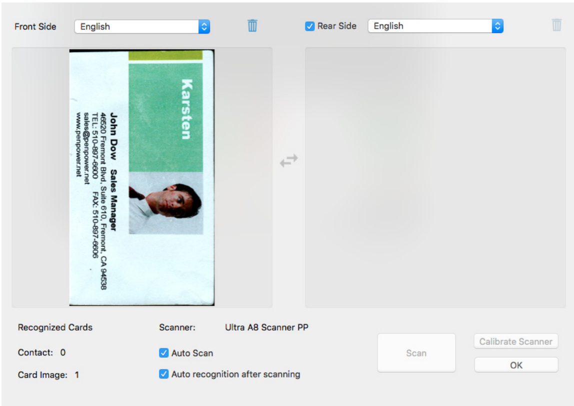
Chapter 2 Add a New Contact

2.1 Add a New Contact by Using a Scanner

2.1.1 By Scan Wizard

First of all, please plug the WorldCard Team scanner cable into a computer's USB port, then you can lift up scanner cover and launch WorldCard Team software.

After WorldCard Team is launched, please click on toolbar, select the recognition language for the front side of the business card. You may check on [Rear Side] and select the recognition language for the rear side of the business card if necessary. You may start scanning the front side of the business card and then the rear side when the light stops flashing from the previous scan. Click [Done] and the Scan Wizard will be closed. The contact information of the business card just scanned will be displayed in the contact list of the main screen.



Tips:

1. Auto Scan: If checked, the scanning will be automatic when a business card is placed into the scanner. The recognition will be performed once the scanning is done. If not, [Scan] button must be clicked to initiate the scan.

2. Auto recognition after scanning: If checked, the recognition will be automatically performed right after the scanning is done. If not, you have the chance to scan again if the image quality is not good and then click [Done] to perform the recognition.

3. You can scan multiple cards one by one without exiting Scan Wizard if both [Auto Scan] and [Auto recognition after scanning] are checked.

4. Use to delete card image and to exchange the images of the front end and rear end.

2.1.2 By Direct Scan

After WorldCard Team is launched, you may place the business card into the scanner with the side to be scanned facing up. The card will be drawn in while the light is flashing and the scanned image will gradually appear on the lower right-hand corner of the screen. The recognition results will be shown in the contact list on the main screen.

When the light stops flashing, you may scan the other side of the card or just click [Skip Back] to proceed with the next card.

Tips: You can have a proper setup for recognition languages and others by clicking [Set up]/[Scan Options].

2.2 By Manual Input

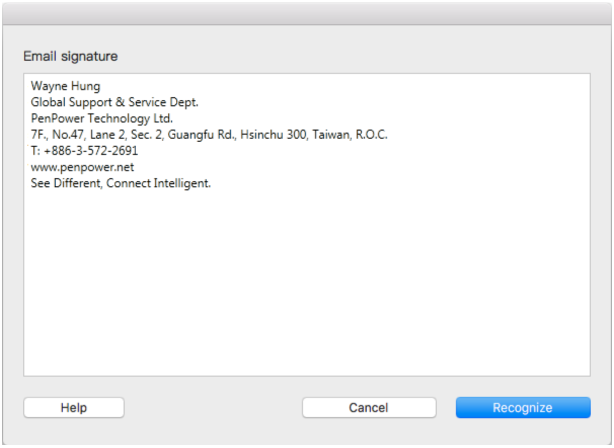
Click [Contact] / [Add a Contact – Manually] to open a blank edit screen of fields for contact details. You can fill out the fields manually then click [Save] on the upper right-hand corner of the screen to save the information you just entered.

2.3 Add a Contact from the Same Company

Select a contact from the contact list and then click [Management] / [Contact] / [Add a Contact – from the Same Company] to open a new edit screen of fields filled automatically with contact info such as Company, Address, Phone, Fax, and Website from the contact just selected. Other fields such as Name, Job Title, and Department are left blank for you to enter manually.

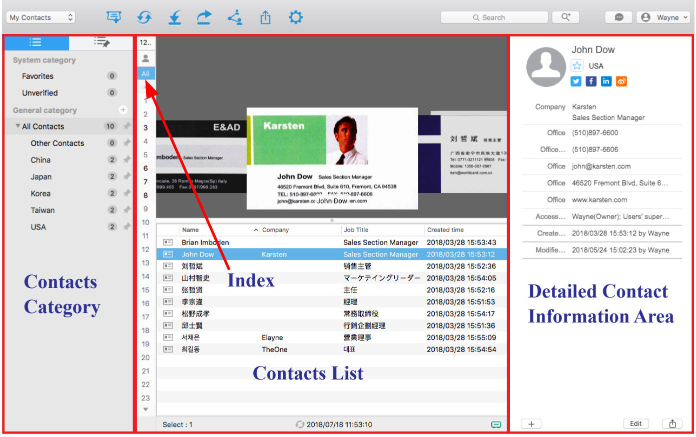
2.4 Add a Contact from Email Signature

WorldCard Team can add a new contact from the signature of the received email. Click [Management] / [Contact] / [Add a Contact – Email Signature] to open a dialogue box for Email Signature. Copy an existing email signature, paste it on Email Signature dialogue box, and click [Recognize] to add a new contact record with contact info from the email signature.



Chapter 3 Edit a Contact

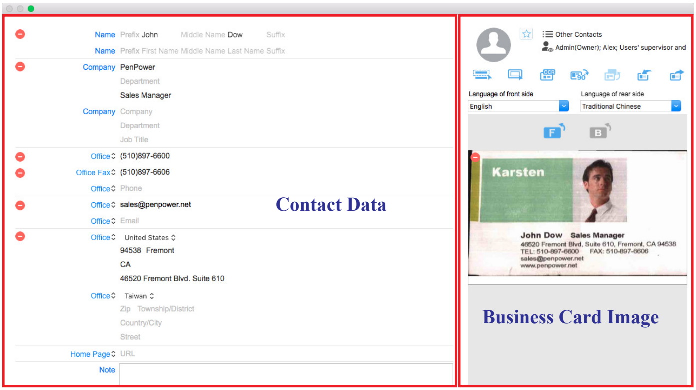
You may add additional information to a contact or revise its recognition result by double clicking a contact from the contact list to enter the edit screen of a contact.



Tip: On the main screen, you can click on the index to change the way the contacts are displayed. Click EN to switch the language of the index; click to switch the index by using the person or company name.

3.1 Edit Screen

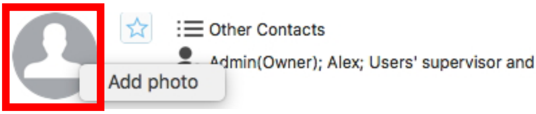
There are two sections in contact edit screen. [Contact Data], and [Business Card Image]. Click [Save] on the lower right-hand side of the screen to save the edited work and exit the screen or click [Cancel] to drop the work.



3.1.1 Editing Contact Data

In [Contact Data] section, you may modify the content of any field. Besides, you can also:

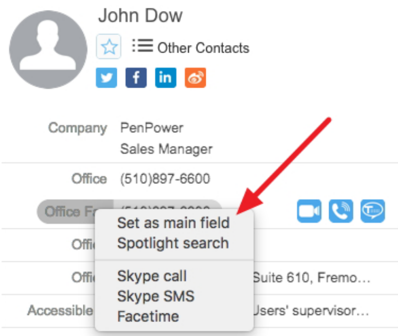
Add a Portrait Photo: Click on the avatar icon to add a portrait photo. Click on the existing portrait photo to replace with a new one or delete it.



Edit User Defined Field: When the administrator open some particular fields for all users, you can enter those information in the edit page.

Add other Fields: If you want to add information such as Instant Message ID, EIN number, or anniversary, click the bottom + on the lower-left to add the relevant fields.

Tips: If you have multiple groups of names or phone numbers, you can adjust the field data to the field attribute by clicking on a field name of Detailed Contact Information Area in the main page and selecting [Set as main field].



3.1.2 Business Card Image

If there is a business card image, it will be displayed on the lower right-hand side of the contact edit screen. Here is what you can do:

Click F and B to review the images of the front end or rear end of the card.

Click on upper right corner of image to expand the card, to zoom in, and to zoom out.

Click to rotate the card 90 degree.

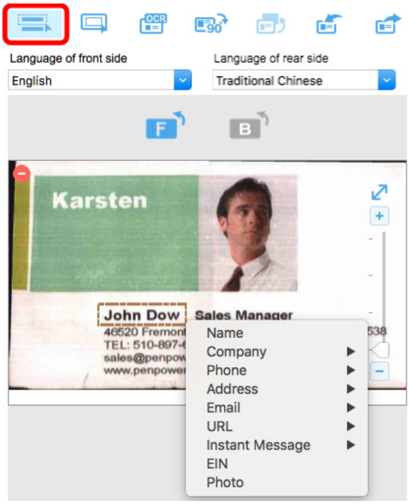
Click to load a card image or to scan.

Click to export the card image to save.

Click on the upper left-hand side of the image to delete it.

⦿ Partially Re-recognize Contact Data

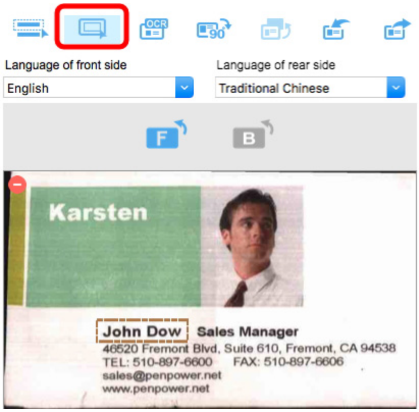
If the recognition result of a particular field is not correct or incomplete, you can use [Partially Select and Recognize] function to re-recognize this field. Click first and crop this particular field on the card image with a blue dotted rectangle by holding the left click and dragging the mouse. A pop-up menu will be shown when you release the left click. Select the name of this field and the new recognition result will be assigned to that field. If you select Photo, the cropped image will be shown in the area of avatar icon.



⦿ Crop the Card Image Manually

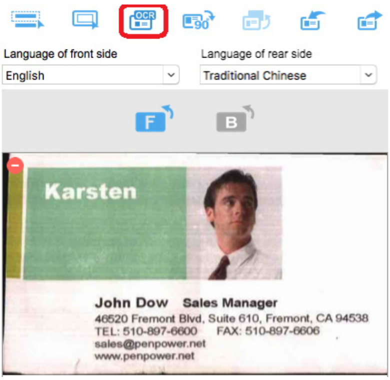
You can click to crop the card image by holding the left click and dragging. When releasing the left click, a dialogue box of [Are you sure to modify] appears. Click

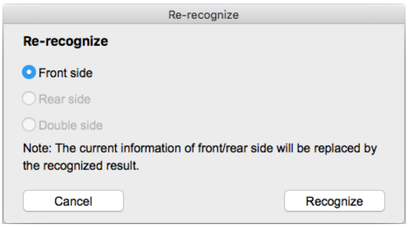
[Yes] and the area outside of the dotted rectangle will be removed.



⦿ Re-Recognize the Card

Please confirm the recognition languages for both sides of the card first and click to perform the recognition again. If you want both sides to be recognized again, please check on [Both Sides] and then click [OK].





Tips: If the business card is double-sided, you may click to exchange the card images.

3.2 Delete a contact

You can delete a contact by selecting it from the contact list, clicking the right click, and then choose [Delete] from the pop-up menu. However, the data on [Shared Contacts] still remains. You may download it from [Shared Contacts] if you need this contact in your contact list again.

For more details on [Shared Contacts], please refer to Chapter 7.

Tips:

1. ***Contact data on [Shared Contacts] can only be deleted by its owner and administrator. 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.***

2. ***If you delete a contact record of your own from [Shared Contacts], the same record will also be deleted from your [My Contact].***

3.3 Setting Your Contacts for Other Users to Access (Sharing Contacts)

The function of [Accessible User] in the edit page is made for you to set up which users are able to use your contacts, it equals to you share your contacts with the users you'd like to share.

On the upper right-hand side of contact edit screen, you may click  to open a window of a list of users. Select the user to grant his access right to this contact by left clicking on the user. You can select multiple users and then click [OK] to complete the setting. For more details, please refer to Chapter 6.

Chapter 4 Manage Contacts by Categories

WorldCard Team supports the structure of multiple levels and multiple categories, you can better manage your contacts by placing contacts in different categories. Operations on contacts such as search, and import/export can be performed based on category.

4.1 Default Categories

There are four default categories: [All contacts], [Other contacts], [Favorites], and [Unverified]. They cannot be deleted or renamed.

My Favorites: Click ☆ on the Detailed Contact Information Area to add this contact into [My Favorites] category. Click ★ again will remove it.

Other Contacts: All contacts not placed in any other category will be placed in [Other contacts]. Contacts coming from other software through synchronization are usually placed here.

Unverified: Unverified contacts are shown in boldface meaning they haven't been edited yet. The unverified status will be changed after you edit it.

4.2 Add a Category

There are several ways to add a category.

4.2.1 Add Main Category

1. Select [All contacts], then select [Contacts] / [Add Category] in the upper left software menu and enter the category name to complete.
2. Or right click on the [All contacts] , and select [Add Category] from the pop-up menu.

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

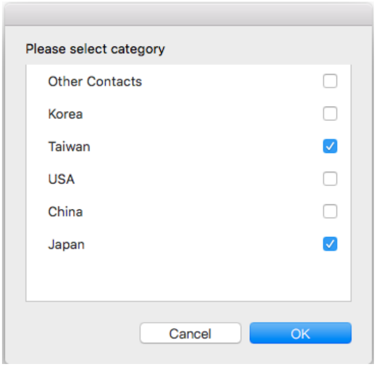
4.2.2 Add Subcategory

1. Select the category you want to add subcategory under it, then select [Contacts] / [Add Category] in the upper left software menu and enter the category name to complete.
2. Or right click on the category you want to add subcategory under it, and select [Add Category] from the pop-up menu.

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

4.3 Assign a Category to a Contact

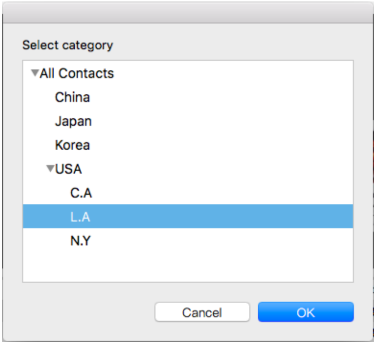
If you want to assign a category to a contact, please right click on that contact and click on [Change category] from the pop-up menu to open the category list, and tick on the category you want to assign.



In Detailed Contact Information Area, you may also click ☰ to the right of the avatar icon to assign a category to the contact.

A contact can belong to multiple categories. For example, a contact can be in both category “Friend” and category “Supplier”. You can make multiple selections of categories on category management screen.

In addition, if you want to move the category location, right click on the category you want to move, select [Move category], and then click the location you want to move in the window.



4.3.1 Pin the Commonly Used Category

There will be a button on the right of the category menu, you can tap it to pin the category as a commonly used category, in this way, you don't have to search for the commonly used categories in the whole categories, just simply tap below the category menu screen to switch to the pinned list, then you will be able to find the contact information much easier. To remove from the pinned list, just click .

4.4 Change the Name of Category / Delete a Category

To change the category name, right-click on the category and select [Change category name] to enter a new category name.

To delete a category, simply move the mouse over the selected category, the deleted icon will appear, and click to delete it.

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

4.5 Adjust the Category Order

When you create multiple categories, you can adjust the most used category to the top to manage and use.

Drag any category with left mouse button long pressed can easily adjust the order.

Chapter 5 Functions for Reaching Contacts

WorldCard Team provides many functions for reaching contacts. You may send an email, make a Skype call, open a website, and search the contact on the social media.

Tips: Press the Command or Shift key on the keyboard with the left mouse button to multi-select contacts in the contact list.

5.1 Send an Email

To send an email, you can right click on the selected contacts or a category and select [Send Email] from the pop-up menu, then press [To], [CC], or [BCC] button depending on the way through which you want to send the mail to contacts, and then the default Email software will be launch for you to start writing the Email, and the contacts' Email addresses will be inserted in.

Reminder: The recipient of the Email has a limit on the number, and can only send up to 50 contacts at a time.

5.2 Share Contact Information via Applications

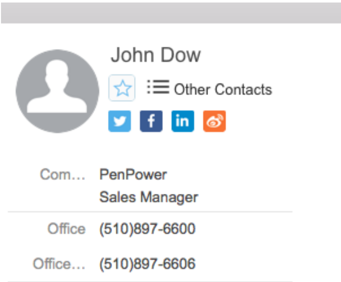
Click on the toolbar after selecting contacts, and choose [Share via APP] to share the contact information to others via applications.

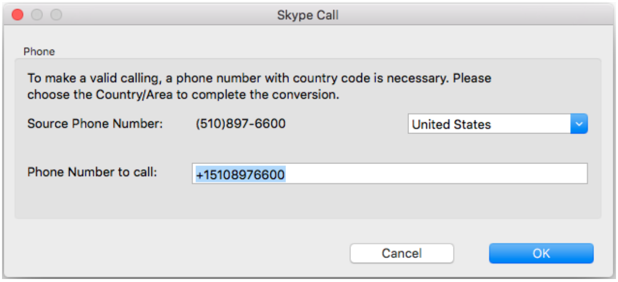
5.3 Skype / FaceTime

When move the mouse cursor on the phone number information of the Detailed Contact Information Area, the / will appear, you click it to make Skype calls or click to send Skype texts.

You can also right click on the contact to make Skype Calls or Texts

Reminder: Skype software needs to be installed before a Skype call can be made, and you need to have Skype credit to make a Skype-out call. If the phone number doesn't come with the country code, a Skype Call screen will be called up for you to select the country code.





5.4 Open Website / Display Map of Address

If a contact information includes URL of company or any website, right click on the contact and choose [Open Website] can open that webpage. Or move the mouse cursor on the URL information of the Detailed Contact Information Area, then the will appear, you can also click it to open webpage.

In addition, if a contact information includes any address information, right click on the contact and choose [Display Map of Address], Google Map or Baidu map webpage will be opened for you to use. Or move the mouse cursor on the address information of the Detailed Contact Information Area, the will appear, then you can also click it to open map.

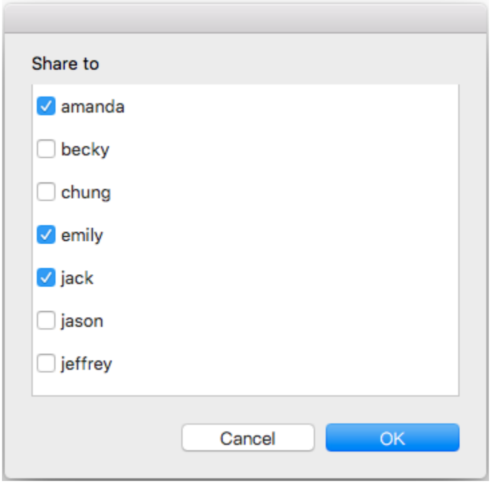
5.5 Search on Social Network

In the Detailed Contact Information Area, you can click on icon to search the contact's information on [Twitter], [Facebook], [LinkedIn] or [Weibo] social Networks.

Chapter 6 Sharing contacts

The user will only see the contact information which created by yourself and subordinates. You cannot see the contacts that created by your supervisor or subordinates from the same department or other departments.

If you wish to share contacts with other users, you can select the contacts you want to share and click  on the toolbar to share. Or right click the contact and choose [Share to Colleague] to open the list, then you will be allowed to specified users to see the information.



Please sync with WorldCard Team server after share. The WorldCard Team server will send notification to the users you share to. If you share the contacts under [Shared Contacts], the users will receive the notification immediately.

The users will receive the notification and find the shared contacts data in the category of your name under the [Shared Contacts].

For [Shared Contacts], please refer to Chapter 7 for more information and refer to Chapter 10 for more information about [Notification].

Reminder: When share the information to others, his/her supervisor will see that information as well.

Notice: Each contact is individual, once you shared, you can cancel it. For example: If you share one contact to user A, you can't cancel A's permission to see that contact. But it won't effects other contacts, user A won't be able to see other contact information.

Chapter 7 Shared Contacts

When there is other user share contact with you, you can find the shared contact under [Shared Contacts]. Please refer to the diagram as below to switch between [My Contacts] and [Shared Contacts].

The contacts under [Shared Contacts] are shared information. You won't be able to edit them, but you can click on the toolbar to download contacts to [My Contacts] to edit.

After downloading, please go back to [My Contact] page to sync with [WorldCard Team] server to retrieve the information. For the same reason, after you edit the information, please sync with server again to upload the information to the server. then the new information will be updated in both [Shared Contacts] and [My Contacts].

For more details of Sync function, please refer to Chapter 9.2.

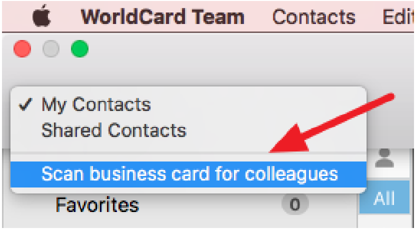
The contact under [Shared Contacts] that never been downloaded, it will show mark at its side, the downloaded one will show mark at its side. Also, you can click on the toolbar to share the contact again no matter that contact is yours or is shared from other user. The user's supervisor who you shared to will see the contact information as well.

Tips: You can see the owner of the contact information and all the accessible users information at the information section at the right side.

Reminder: If the contact has been shared before, you will see the original owner under [Shared Contacts], not the user who shared this contact with you. For example, Paul shared the contact which was shared by John, you will see that contact under John, not Paul.

Chapter 8 Scan for Colleague

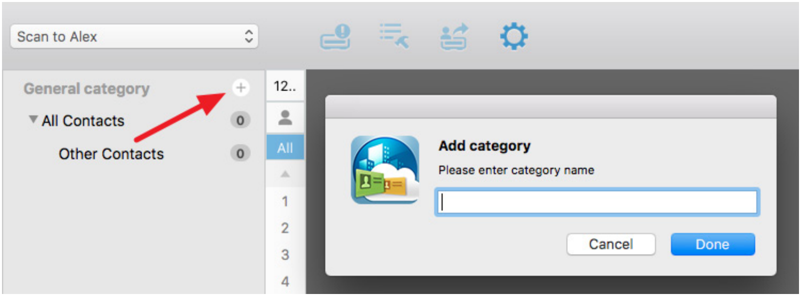
Select [Scan business card for colleagues] in the list at left-top corner of main screen, then tick the user you want to scan to, for example you want to scan for colleague (Alex).



After selecting, it will go to the page of scanning for colleagues, then you can start to scan the business cards with the card scanner that are delivered by the colleague (Alex), and the scanned contacts will be categorized as [Other Contacts].

You can directly help the colleague to categorize the contacts. Please click next to [General category] to add a category, and drag the contact to the category to be categorized and release it to complete the categorization.

please right click on [All Contacts] to add categories, then drag the contacts to the categories to be categorized and then release it to complete the categorization.



After correction and categorization, click the [Transfer to Colleague] on the quick toolbar to send the scanned data to Alex and complete the task.

The contact data will disappear after sending to Alex, and Alex will receive a message notification. When Alex synchronizes with the WorldCard Team server, the contact data you send to him will automatically download it to [My Contacts] for Alex to see the business card you helped him scan.

To cancel the [Scanning for colleague] function. You need to go back to the Settings and click — to remove the person from the list. And [Scan to Alex] will disappear from the list. But the contacts that already sent to Alex won't have any change.

Chapter 9 Sync / Import / Export

Users can use Import / Export / Sync to share contacts data via other software. For example, if you want to use the contacts in System Contact, you just need to export the contacts from WorldCard Team to System Contact. If you want to edit the contacts on System Contact, just simply sync again after editing to update the latest information on both ends.

9.1 Related Settings

Before doing Import / Export / Sync, you will need to enter account / password of certain application first. Please click setting on the toolbar, and switch to [Sync / Export / Import] to set up.

⦿ Synchronization

Auto Sync: Everytime you launch WorldCard Team software, it will sync with WorldCard Tem server automatically. If you tick this option, the system will check every 5 minutes and auto sync between device and server.

Re-download: When you find the the contacts data or the number of contacts on the computer does not match with the WorldCard Team server, click the [Re-download] button. The software will delete all the data on the computer, and then download them all again from WorldCard Team server. This action will take some time, please wait patiently.

⦿ Import

Keep original category: Tick [Keep original category] when importing wcxf file, then all category information will be kept.

⦿ Microsoft Excel

Divide Address Field: You can divide the address into five fields (country / province / street, etc.) when exporting to Excel or CSV file format.

⦿ Sync / Export with CRM

Settings: If the administrator enable the feature to connect Salesforce, please enter your login information here. You can manually export contacts to Salesforce, or have WorldCard Team synced with it automatically. WorldCard Team will sync with Salesforce every 10 minutes if the sync function is on.

Note: WorldCard Team can only support Salesforce Enterprise / Unlimited accounts.

⦿ Company Address Book

Settings: If the administrator enable the feature to connect company address book, please enter your login information here. You can manually export contacts to company address book, or have WorldCard Team synced with it automatically. WorldCard Team will sync with the company address book every 10 minutes if the sync function is on.

9.2 Synchronization

WorldCard Team will update the latest information to the WorldCard Team server or other application by sync function. Also, the system will download the latest information to the device via sync function.

Everytime you launch WorldCard Team software, it will sync with WorldCard Tem server automatically. If you turn on the auto sync, the system will check every 5 minutes and auto sync between device and server.

After downloading, please go back to [My Contact] page to sync with [WorldCard Team] server to retrieve the information. For the same reason, after you edit the information, please sync with server again to upload the information to the server. then the new information will be updated in both [Shared Contacts] and [My Contacts].

If you want to sync manually, please click [Contacts] / [Sync] or click on the toolbar to start, and you will see the progress below.

9.3 Import

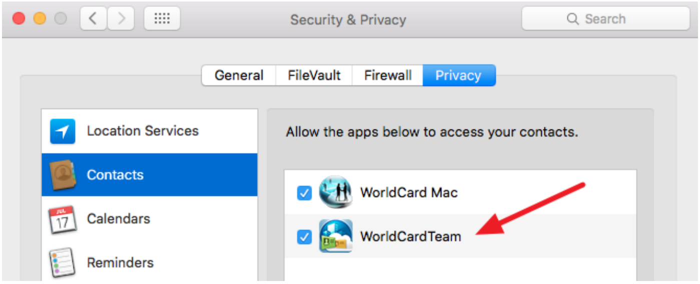
WorldCard Team provides many sources for you to import contacts to use, please click [Contacts] / [Import], or click  on the toolbar, and choose the source:

⦿ WorldCard v4 Data

If your computer has WorldCard v4 software installed, you can select [WorldCard v4 data] to quickly copy the data from WorldCard v4 software to WorldCard Team.

⦿ System Contact

Select [System Contact] and click [Next]. You will be asked to provide authority for WorldCard Team to access. Please go to [System Preferences] / [Security & Privacy] / [Privacy], Click [Contact] and check the [WorldCard Team] on the right hand side, then you will be able to import the data



You can see the information at [All Contacts], original category or [Other Contacts] after importing.

⦿ WorldCard Data Exchange File(*.wcxf)

Wcxf format is compatible with all WorldCard products, it is the best choice to transfer contact data on different operation systems.

Select [*.wcxf], click next to choose the local source then start to import; If you'd like to import form cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

Tips: Tick [Keep original category] when importing wcxf file, then all category information will be kept.

⦿ Image File (*.jpeg)

Choose [Image File (.jpeg)] and click next. Choose the file to import and select language to recognize. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

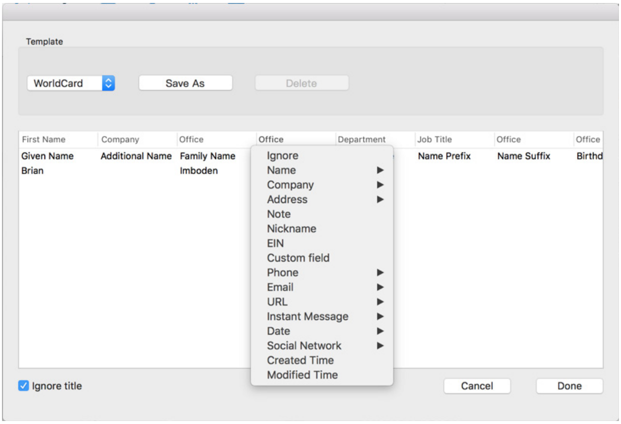
☉ vCard file (*.vcf)

Choose [vCard file (.vcf)] and click next. Choose the file to import. ; If you'd like to import form cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first. You can see the information at [All Contacts], original category or [Other Contacts] after imprting.

☉ CSV File (*.csv)

Choose [CSV file (.csv)] and click next. Choose the file to import. If you'd like to import form cloud storage like Dropbox or Google Drive, please click the [Login] button to log in first.

Then you need to match all the field titles of the CSV file you want to import with the WorldCard Team fields; the top field titles are the WorldCard Team (WorldCard Series) format field titles, and the second field titles are the CSV file field titles you want to import. In order to correctly import the data, please click the WorldCard Team field titles to adjust the field titles to match the CSV file field titles below.



If your CSV file is from WorldCard series, CardScan products or Outlook, you can click the drop-down menu at the top left and choose the WorldCard , CardScan or Outlook option to quickly match the common used fields.

If there is any field you don't need to import, just click the WorldCard Team field titles, and select [Ignore Title] option, then the data of that field will be ignored when importing. You can see the information at [All Contacts], original category or [Other Contacts] after importing.

Tips: After you fill all the information, you can click [Save As] button in the Template section to save as template for future use.

Caution: If the first row is contact information but not field titles, please tick [Import the first row].

9.4 Export

For different information range, you can select specified contacts or all contacts to export. Also, you can export as different format. Choose [All card information], then all contacts will be exported; Select [All cards in the preview area], only the card in that page view will be exported; Select [Selected cards], only the card has been selected will be exported.

Go to [Contacts] / [Export] or click on the toolbar then select the target to export:

⦿ Microsoft Outlook

Choose [Microsoft Outlook] and select the data range and file path to save, then click [OK] to start exporting, then you will see the exported data in [Microsoft Outlook].

⦿ System Contact

Select [System Contact] and the export data range, then choose to export to System Contact folder on local, or export to iCloud, and then you can see the contact data at the destination after exporting.

⦿ Salesforce

Choose [Salesforce] and select data range that you want to export, then you need to login and set the path for export, and click [OK] to start exporting. After exporting, you will see all information in [Salesforce].

Caution: [WorldCard Team] only supports Salesforce Enterprise / Unlimited account.

⦿ Company Address Book

Choose [Company Address Book] and select data range that you want to export, then you need to login and set the path for export, and click [OK] to start exporting. After exporting, you will see all information in the company address book.

⦿ Image File(*.jpeg) / Microsoft Excel(*.xlsx) / Text file(*.txt) / CSV File(*.csv)

Choose the target you need, and select the data range and file path to save, and click [OK] to start exporting, you will see the exported file in the assigned location.

⦿ vCard File(*.vcf)

Choose [vCard File (.vcf)] select the data range and file path to save, and click [OK] to start exporting, you will see the exported file in the assigned location.

Tips:

1. **You can select the contacts on the contact list, and right click on them to export.**
2. **You can choose two different formats to export: Google Contacts / Mac Contacts vCard (Unicode) and MS outlook vCard (ANSI).**

9.5 WorldCard Data Exchange Compatibility List

Import

Item	Version
System Contact	Mac OS X 10.11 and above
WorldCard Data Exchange File *.wcxf	all
CSV File	all
vCard File	2.1/3.0
Image Files	all

Export

Item	Version
Microsoft Outlook	2016~2019
System Contact	Mac OS X 10.11 and above
Salesforce Contacts (Enterprise / Unlimited)	all
Salesforce Leads (Enterprise / Unlimited)	all
Image Files	all
Microsoft Excel	2016~2019
Company Address Book	MS Office 365 / Exchange
CSV File	all
vCard File	2.1/3.0
Text File	all

Chapter 10 Notifiction / Searching Contact

10.1 Notification

If there is any other user wants to share contact with you or there is any information has been updated. You will receive notification from the system. If you want to check the notification, click on the top right corner to open the [Notification].

You will see the notifications from all the users in the [Notifictaion] page, but you won't be able to delete any notification. The limitation is 500 notifications, and the system will remove old notifications and keep the latest notifications.

If other user wants to share information with you, you will see the simple information from notification. You just need to click , the shared contact will be saved to [My Contacts] easily.

Tips: You can click the titles of [Date] / [Share] / [About] to re-arrange the order.

10.2 Searching Contact

After entering the keyword in the search bar at the top right of the screen, the software will list the contacts that have keyword information. If you want to search for a specific contact with more precise conditions, click next to the search bar, and enter various conditions to search. Also you can search in [My Contacts] and [Shared Contacts] by clicking the tabs at the top left of the screen to switch between the two areas.

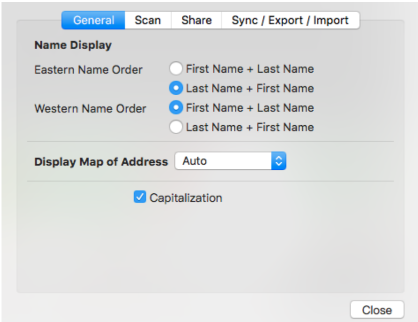
Chapter 11 Settings

You can adjust all settings by click the on the top right to go to set up menu at main screen.

11.1 Change Password / Name Display

Click [User Name] on the top right corner to open the option list and click [Profile] then choose to change user password and account name. If you forgot your password, please go to login menu and select [Forgot password] to reset.

11.2 General Settings



11.2.1 Name Sort Order

You can adjust how to show the contact name, you can adjust the display order by Last, First or First, Last.

11.2.2 Map Display

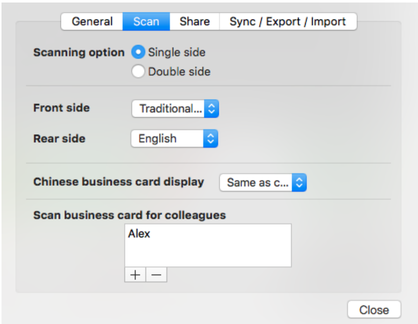
You can choose the different map to check the address.

- **Auto:** System will identify the location of the contact, if the person is in China, system will switch to Baidu Map and Google Map for other countries.
- **Google Map:** Use Google Map as default Map.
- **Baidu Map:** Use Baidu Map as default Map

11.2.3 Capitalize for Surname

Capitalize will be default setting for name sorting in Western sorting. You can adjust it at any time.

11.3 Scan Settings

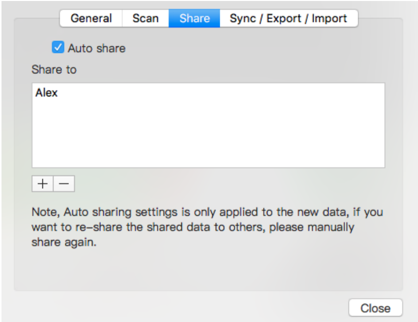


You can define to scan single side or double side, front / back side language or Chinese character set.

Also, if you have the permission to scan for supervisor or colleague, you can select contacts to share with. Click + to add contacts to share list and the system will auto share to those users when you add new contacts.

To cancel to share with specified user, just click on the user's name and click −.

11.4 Contacts Searching Settings

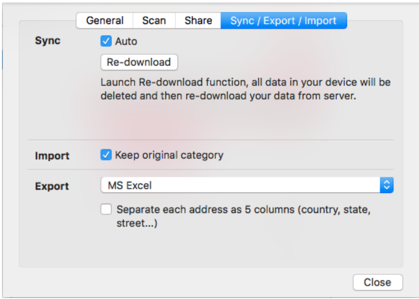


Turn on [Auto Share], you can click [+] to select certain users to share with your new added contacts. Those users will receive notification when you add new contacts in the system.

If you want to cancel to share with specified user, just click on the user's name and click [–].

11.5 Sync / Import / Export Settings

To find the settings for different software, please refer to Chapter 9.1 for more information.



WorldCard Team v1.7 Mac User Manual

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