WorldCard Team

Windows User Manual

Version: v1.7

Release: January, 2020

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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 9-3

v1.6.0

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

v1.5.0

- Support Office 2019 and ACT! 2019(v21).

v1.4.0

- Support account suspension feature.
- Added Thai and Swedish indexing features.
- Support Office 365 desktop application.

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

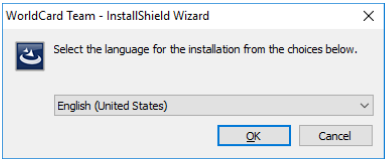
- Year 2017, first version.

Chapter 1 Getting Started

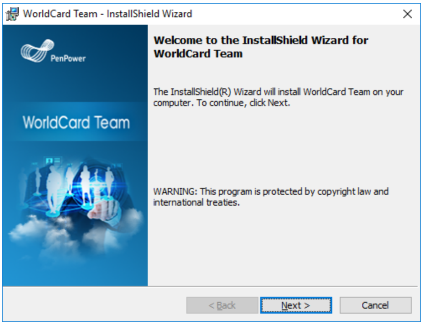
1.1 Installation

Please go to PenPower's web site (http://download.worldcardteam.com), find the download entry of WorldCard Team Windows software to download, then double click the downloaded file to start installation.

1. On Installation Wizard, select the language you want to use and click [OK].

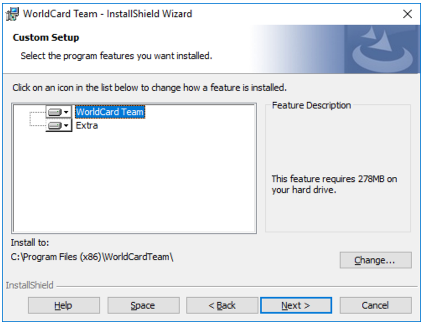


2. Click [Next] to continue.

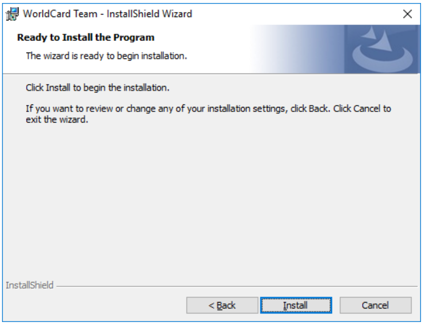


3. Check on [I accept the terms in license agreement] and then click [Next] after reading the user license agreement.

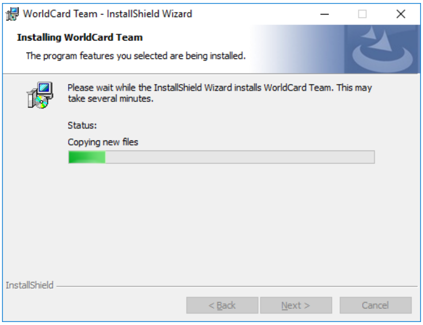
4. Click [Browse] to select other installation folder if you don't want to use the default installation folder, then click [Next].

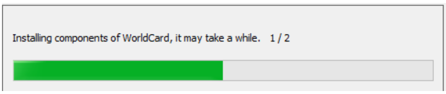


5. Click [Install] to start installation. You may click [Back] to go back to the previous step to change the default folder.

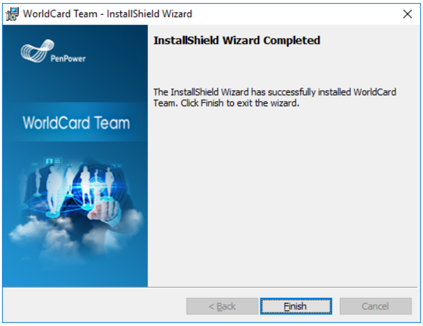


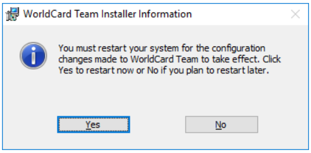
6. WorldCard Team software installation is in progress.





7. After the installation is completed, please click [Finish] to exit installation wizard and then click [Yes] to restart the computer.





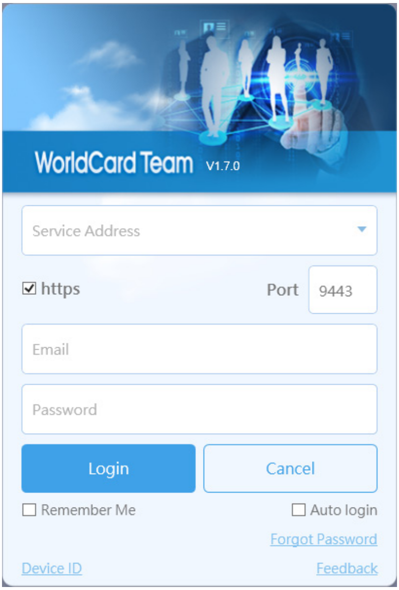
1.2 Connecting the Scanner

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].

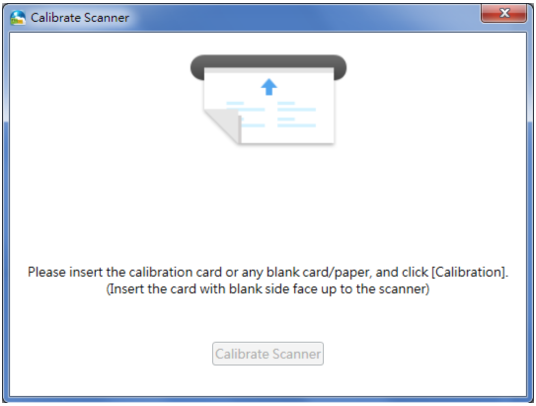
Note: One account can only log in to a computer and a smart phone at the same time. For example, after logging in to the Windows computer and logging in to the Mac computer again, the connection on the Windows side will be suspended, but the web version is not limited here.

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.

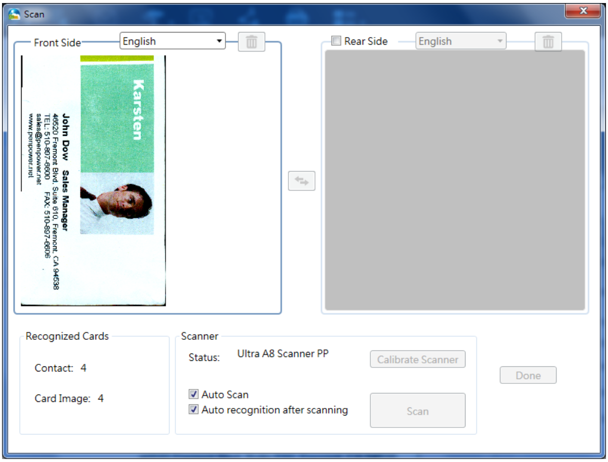
Chapter 2 Add a New Contact

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. The scanner driver will be automatically installed if it's the first time being plugged into the computer. After the driver installation is completed, you may 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

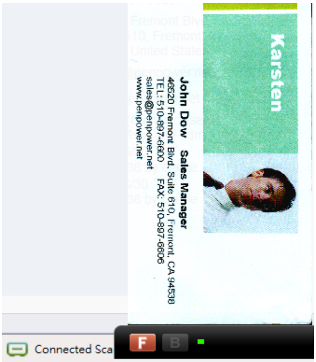
not good and then click [Done] to perform the recognition.

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

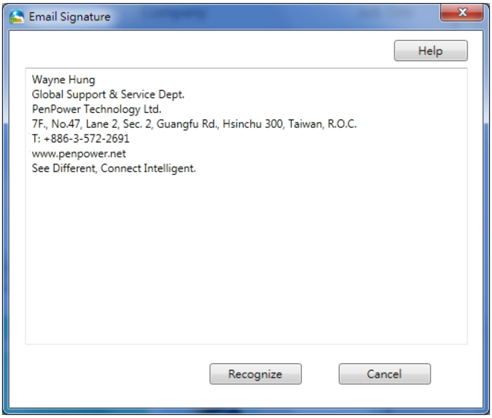
Click [Management] / [Contact] / [Add a Contact – Manually] to open a blank edit screen of fields for contact details. You can fill out the fields manually then click [Save] on the upper right-hand corner of the screen to save the information you just entered.

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.

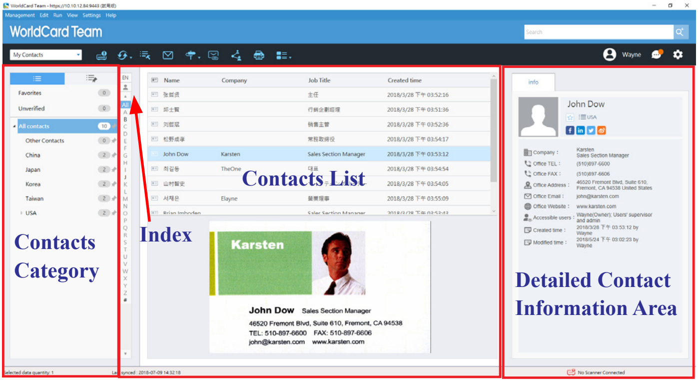
2.4 Add a Contact from Email Signature

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

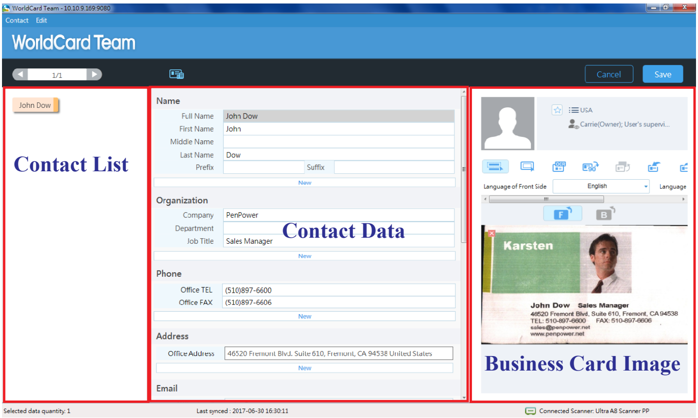
You may add additional information to a contact or revise its recognition result by double clicking a contact from the contact list to enter the edit screen of a contact.



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



Tips: If you want to add a new contact from the same company, you may click on the contact edit screen or click [Management] / [Contact] / [Add a Contact – from the Same Company] to open a new edit screen of fields filled automatically with contact data such as Company, Address, Phone, Fax, and other relevant info.

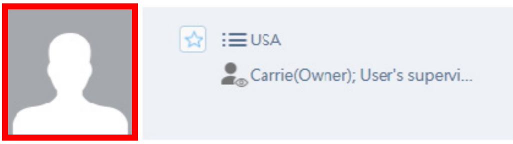
3.1.1 Contact List

Categories and search results will be displayed in the section of Contact List so that you can quickly switch between contacts by clicking contact buttons when editing. All contacts can be displayed by clicking [Expand All Data] on the bottom of the list. Edited work will be saved before switching to other contact. You may click [Edit] / [Restore] on the upper left-hand side of the screen to abandon the edited work before switching to other contact.

3.1.2 Editing Contact Data

In [Contact Data] section, you may modify the content of any field. You can click another contact in [Contact List] section to modify its contact data. 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.



Information Displayed Order: If there are multiple names or companies for a contact record, you can change the displayed order by moving the cursor above the field and clicking .

Address Format: You can change the different address format by selecting a format from the address pull-down menu.

Small Icons: There are small icons associated with different fields with which you can dial a phone number, send an email, open a web site,etc., just by clicking the icon.

3.1.3 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 and 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.

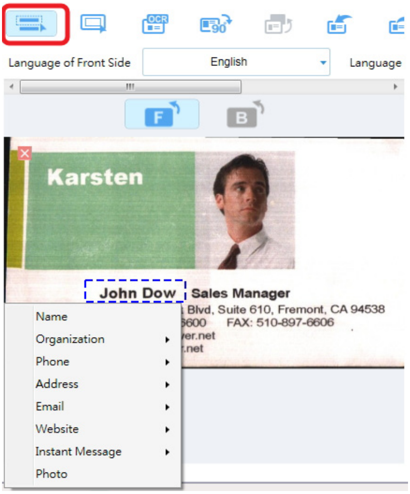
Click to load a card image or to scan.

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

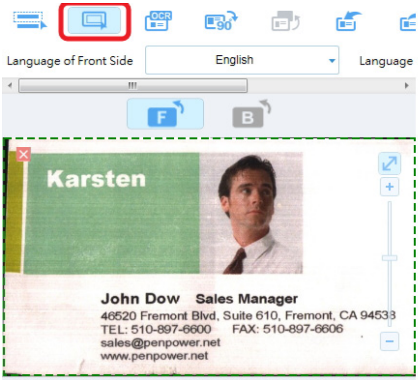
If the recognition result of a particular field is not correct or incomplete, you can use [Partially Select and Recognize] function to re-recognize this field. Click first and crop this particular field on the card image with a blue dotted rectangle by holding the left click and dragging the mouse. A 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

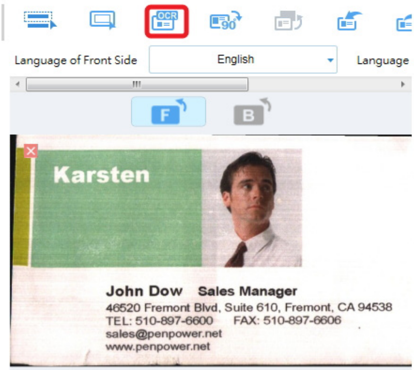
You can click to crop the card image by holding the left click and dragging.

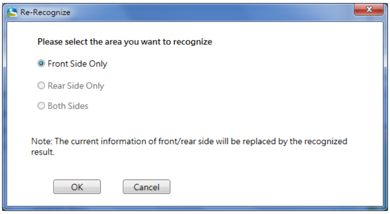
When releasing the left click, a dialogue box of [Are you sure to modify] appears. Click [Yes] and the area outside of the dotted rectangle will be removed.



⊙ Re-Recognize the Card

Please confirm the recognition languages for both sides of the card first and click or [Edit / Re-Recognize] 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, print, 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: On the right-hand side of the list mode screen or contact edit screen, you can click 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. To change the unverified status, you can double click on the contact to edit it or click [Edit] / [Mark as Edited].

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 [Management] / [Category] / [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.

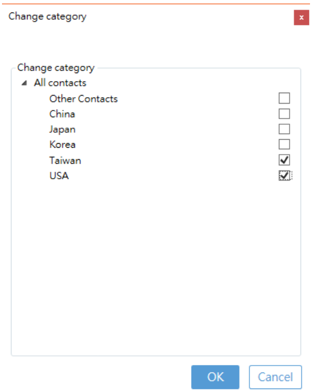
4.2.2 Add Subcategory

1. Select the category you want to add subcategory under it, then select [Management] / [Category] / [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.

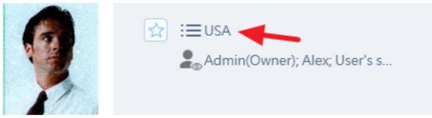
Reminder: The upper limit of the category level is three levels.

4.3 Assign a Category to a Contact

If you want to assign a category to a contact, please select a contact and click [Management] / [Contact] / [Change category] to open a screen where you can check a category on the left side of the screen and click [OK]. Or you can right click on the selected contact and click on [Change category] from the pop-up menu to open the same screen.

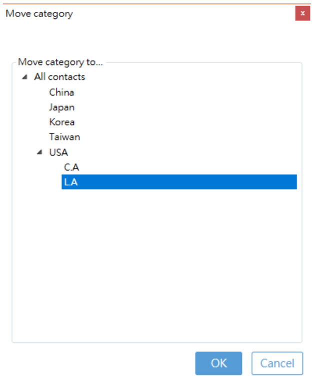


In contact detail section, you may also click  to the right of the avatar icon to assign a category to the contact.



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 Category Name

There are two ways to change category name:

1. Select the category you want to change the name, and then select [Management] / [Category] / [Rename Category] in the upper left software menu.
2. Right click on the category you want to change the name, and select [Rename Category] from the pop-up menu.

4.5 Delete a Category

There are two ways to delete a category.

1. Select the category you want to delete, and then select [Management] / [Category] / [Delete Category].
2. Right click on the category you want to delete, and select [Delete Category] from the pop-up menu.

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

Chapter 5 Functions for Reaching Contacts

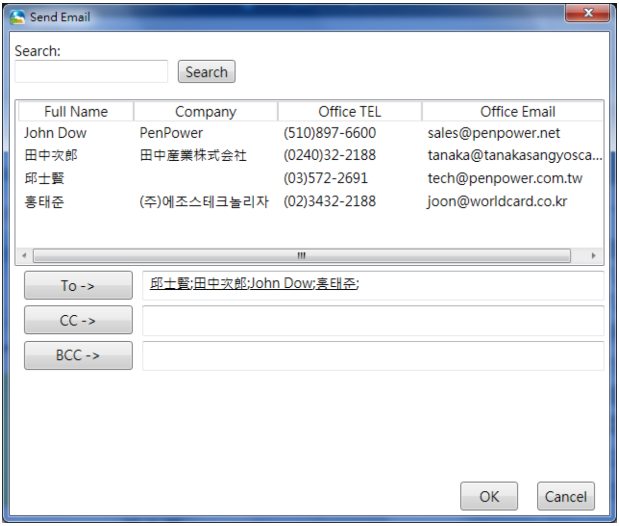
WorldCard Team provides many functions for reaching contacts. You may send an email, make a Skype call, send a Skype text, open a website, plan a visiting route to the contact, and search the contact on the social media.

Tips:

1. **You can merge two contacts into one or split one contact into two by clicking [Management] / [Contact]. Please refer to Tip 2 on how to select two contacts for Merge function.**
2. **By left clicking the mouse while pressing Ctrl or Shift key , you can make multiple selections from the contact list.**

5.1 Send an Email

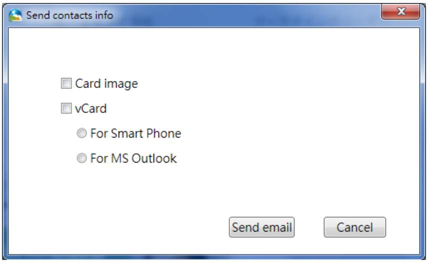
To send an email, you can right click on the selected contacts or a category and select [Send Email] from the pop-up menu, or click  on the toolbar, or click [Run]/[Send Email] to open Send-Email screen.



Select contacts and press [To], [CC], or [BCC] button depending on the way through which you want to send the mail to contacts.

5.2 Transfer Contact Data

If you have permission to export contact data, you can send out card image and vCard file through Email by clicking on the toolbar.

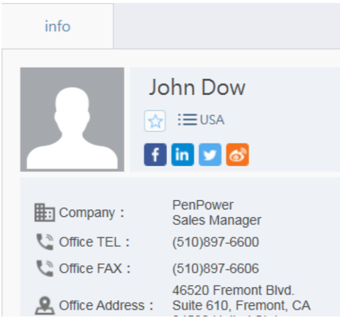


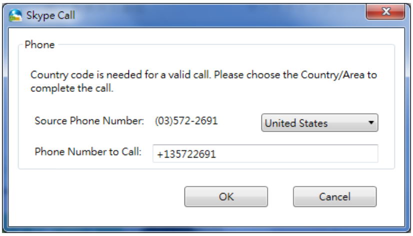
5.3 Make a Skype Call

Skype software needs to be installed before a Skype call can be made. If there is a phone number associated with the contact, you can right click on the contact and select [Skype] or click [Run] / [Skype] on the selected contact to open a screen where you can make a call or send a text by clicking or , respectively.

Besides, you may also be able to click on the same icon when you move the cursor above the Phone field in the contact detail sheet. 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.

You need to have Skype credit to make a Skype-out call.





5.4 Open Website / Display Map of Address

If a contact information includes URL of company or any website, click  on the toolbar, or right click on the contact and choose [Open Website] can open that webpage. In addition, click the drop-down arrow next to the icon and click , or right click on the contact and choose [Display Map of Address], then choose the address you are willing to look up to open the Google Map or Baidu map.

5.5 Route Planning

WorldCard Team provides Route Planning function allows you to plan routes between several contacts' address via Google Map and two contacts' address via Baidu Map. Please note if you use Baidu map, you can only plan two contact addresses. You can change the map you want to use in the Settings.

1. Right click one or several slected contacts, and choose [Route Planning].
2. Choose to display by Google Map or Baidu map.
3. Select the specific contacts' addresses or click [Select All]. Then click [Next]. You can also edit [My Address] and add it into your route planning.

Tips: WorldCard will automatically save the address you entered in [My Address]. Next time you can directly choose it o use.

4. You will see the route planning window afterwards. Please check the area, starting location and destination again before clicking [OK]. You can use [Move Up] and

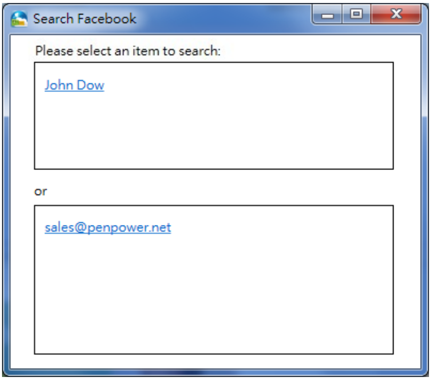
[Move Down] buttons to change the order of the addresses.

Tips: You can click [Previous] to reselect the address in your route planning.

5. After clicking [OK], WorldCard Team will launch the default web browser to open map to show you the route planning results.

5.6 Search on Social Network

You can right click on the contact and find [Social Network] or click [run] / [Social Network] then you can choose [Search on Facebook], [Search on Twitter], [Search on LinkedIn] or [Search on Weibo]. Also, you may choose search by Email or name.



5.7 Print Preview

If you have permission to print, you can print the contact information on demand. You can print on envelop, label, card and etc. Also, you can adjust the font size.

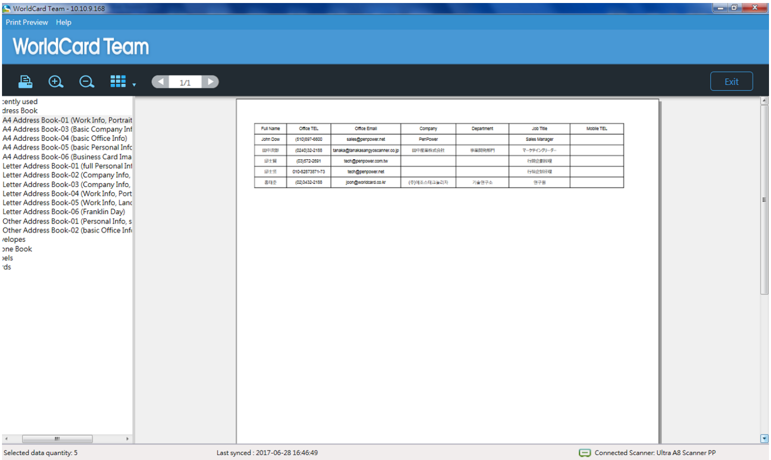
Click and to zoom out or zoom in.

To select printing area, click [selected cards] or [all cards in preview area].

Click to print contact information.

Click [switch off] on top right corner to turn off print preview.

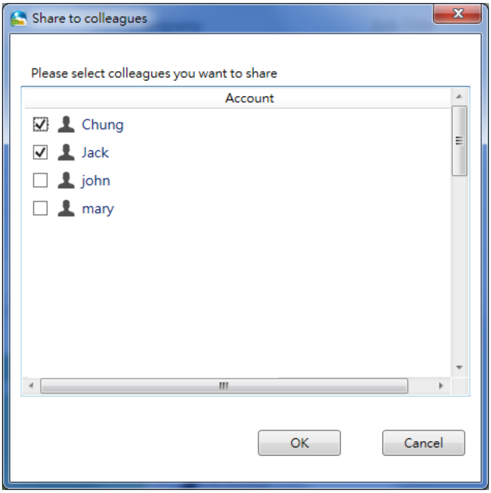
Click 1/3 to change to other preview page.



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.

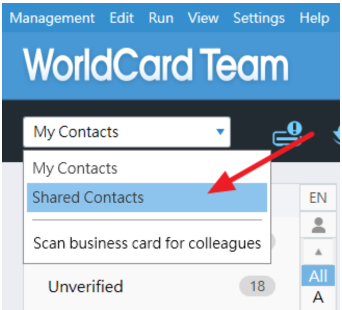
The users will receive the notification and find the shared contacts data in the category of your name under the [Shared Contacts]. For [Shared Contacts], please refer to Chapter 7 for more information and refer to Chapter 10 for more information about [Notification].

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.

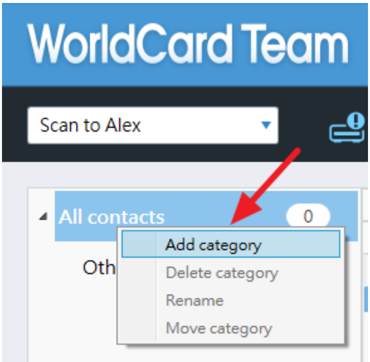
Reminder: If the contact has been shared before, you will see the original owner under [Shared Contacts], not the user who shared this contact with you. For example, Paul shared the contact which was shared by John, you will see that contact under John, not Paul.

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 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 stop scanning for Alex, please go to the [Scan] page in the Settings, select the name you want in the [Colleagues] list, then click to remove the account 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 Outlook, you just need to export the contacts from WorldCard Team to Outlook. If you want to edit the contacts on Outlook, just simply sync again after editing to update the latest information on both ends.

Note: All supported applications might have limitation. Please refer to Chapter 8.5 for more information. For example, WorldCard Team can only support ACT! 2011~2017(v19), and only support Salesforce Enterprise / Unlimited accounts.

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 to set up.

⦿ WorldCard Team Server

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.

⦿ Outlook Contact

Sync Folder: Click [Browse] to change the contact folder of Outlook to sync.

Sync Record: If clicking [Delete Sync record] button, all the established synchronization relationship and records of this application will be deleted, next time you sync with this application again, it will be treated as a first time sync. But if you delete some contacts by mistake, or you wish to modify some contacts data on one side without affecting the other side, you can click it to delete the sync records, then next time you sync with this application, all the data will be kept. Please note this will cause the duplicate contacts appear.

Export Contacts with Card Images: If you want to view card images in Outlook Contacts, you can check [Export Contacts with Card Images] to export the card images into Outlook Contacts as well.

⦿ ACT!

Settings: Please enter your ACT! login information here, and click [Browse] to assign the database path.

Export Contacts with Card Images: If you want to view card images in ACT!, you can check [Export Contacts with Card Images] to export the card images into Outlook Contacts as well.

⦿ Lotus Notes

Settings: Please click [Browse] to assign the Lotus Notes database path.

⦿ Salesforce

Settings: Please enter your Salesforce login information here.

Salesforce Export / Sync 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.

⦿ Dropbox

Convert Category Information while Importing: In the file format data you import, there may be a situation where the contacts are classified as hierarchical. Since the category of WorldCard Team is not a hierarchical category, you must choose how to import the file. Select [Merge multi-layer as single] to string up all the class strings, or select [Keep the first layer only] to import the first layer of the data category as this contact in the WorldCard Team category.

⦿ wcxf File

Filter Duplicates: You can tick [Find Duplicates] to filter all the duplicate contacts and keep the latest when you import from other places.

Convert Category Information while Importing: In the file format data you import, there may be a situation where the contacts are classified as hierarchical. Since the category of WorldCard Team is not a hierarchical category, you must choose how to import the file. Select [Merge multi-layer as single] to string up all the class strings, or select [Keep the first layer only] to import the first layer of the data category as this contact in the WorldCard Team category.

⦿ wcf File

Filter Duplicates: You can tick [Find Duplicates] to filter all the duplicate contacts and keep the latest when you import from other places.

Convert Category Information while Importing: In the file format data you import, there may be a situation where the contacts are classified as hierarchical. Since the category of WorldCard Team is not a hierarchical category, you must choose how to import the file. Select [Merge multi-layer as single] to string up all the class strings, or select [Keep the first layer only] to import the first layer of the data category as this contact in the WorldCard Team category.

⦿ Company Address Book

Account Settings: Enter your company address book account and password, complete account verification and login, and WorldCard Team can synchronize contacts with company address book.

Export / Sync 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 company address book every 10 minutes if the sync function is on.

⦿ Microsoft Excel

Export: Export the information from the available fields, by click the items in the display field. You can click the [Move up] or [Move down] to adjust the sorting or click [Remove] to remove the displayed field or click [Default] to restore the WorldCard Team default settings.

In addition, you can also select the address information will be divided into five fields (country / province / street, etc.).

⦿ Txt file

Export: Export the information from the available fields, by click the items in the display field. You can click the [Move up] or [Move down] to adjust the sorting or click [Remove] to remove the displayed field or click [Default] to restore the WorldCard Team default settings.

⦿ CSV file

Export: Export the information from the available fields, by click the items in the display field. You can click the [Move up] or [Move down] to adjust the sorting or click [Remove] to remove the displayed field or click [Default] to restore the WorldCard Team default settings.

In addition, you can also select the address information will be divided into five fields (country / province / street, etc.).

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.

If you want to sync manually, please go to [Run] / [Sync] or click  on the toolbar then choose the target to sync with.

⦿ WorldCard Team Server

Once you've added / edited / deleted contacts, downloaded new contacts from [Shared Contacts], or shared contacts to other users, please sync with WorldCard Team server, so that all your information will update to the server.

⊙ Microsoft Outlook

Choose Microsoft Outlook to start checking data. After checking, the system will inform you how many contacts have been added, edited or deleted. If you decide to sync, please click [Sync] or click exit to close the diagram.

Reminder: After syncing, if you wish to modify or delete some contact data on one side without affecting the other side, you can click [Delete Sync record] button in the Settings to delete the sync records, then next time you sync with this application, all the data will be kept. Please note this will cause the duplicate contacts appeared.

9.3 Import

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

⊙ Microsoft Outlook / Lotus Notes

Select [Microsoft Outlook / Lotus Notes], click next to enter all the needed information, then click [OK] to start. You can see the information at [All Contacts], original category or [Other Contacts].

⊙ ACT!

Select [ACT!], click next to enter all the needed information, then click [OK] to start. You can see the information at [All Contacts], original category or [Other Contacts].

⊙ Dropbox Space

Select [Dropbox space], click next to login. Then choose the wcxf file to import, You can see the information at [All Contacts], original category or [Other Contacts].

Tips: Tick [Keep original category] , then all category information will be kept. You can also click to delete wcxf file on Dropbox.

⊙ WorldCard v8 Data Exchange File(*.wcxf) / WorldCard v6 Data Exchange File(*.wcf)

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

Select [*.wcxf] / [*.wcf], click next to choose the source then start to import. You can see the information at [All Contacts], original category or [Other Contacts].

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

⦿ WorldCard v8 Database

If you have a database of WorldCard v8 software, you can select [WorldCard v8 database] and click [Next] to find the [Default.wrp] file in the database, then start to import.

⦿ 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].

⦿ CSV File (*.csv)

Choose [CSV File (.csv)] and click next. Choose the file to import, then you will see the column in the middle of the screen shows [Ignore]. You can pull the option list to match the correct field, such as name, surname, company, job title, department and etc. When you complete the steps then click confirm button. You can see the information at [All Contacts], original category or [Other Contacts].

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, please tick [Import the first row].

⦿ vCard file (*.vcf)

Choose [vCard file (.vcf)] and click next. Choose the file to import. You can see the information at [All Contacts], original category or [Other Contacts].

Note: The supported vCard format are v2.1/3.0.

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.

Reminder: You need to set up the account name, password, path or related producer to export.

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

☉ Microsoft Outlook / Lotus Notes

Choose [Microsoft Outlook / Lotus Notes] and select the data range, and click [OK] to start exporting, then you will see the exported data in [Microsoft Outlook / Lotus Notes].

☉ ACT! / Salesforce

Choose [ACT! / 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 [ACT! / 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, then click [OK] to start exporting. After exporting, you will see all information in the company address book.

Select "Company Address Book (MS Office 365)" and export data range, and log in to the account path, you can see that the contact information has been exported to "MS Office 365".

☉ 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.

Tips:

1. You can also select the contacts on the contact list and right click on them, then choose [Export] and select the format to export.

2. When exporting as CSV format, you can choose the code as ASNI (default) or Unicode.

⦿ vCard File(*.vcf)

Choose [vCard File (.vcf)] select the data range and file path to save, and click [OK] to start exporting.

Note: vCard v3.0 support two different formats to export: Google Contacts / Mac Contacts vCard (Unicode) and MS outlook vCard (ANSI).

9.5 WorldCard Data Exchange Compatibility List

Synchronization

Item	Version
Microsoft Outlook	2003~2019. For Office 365, only supports desktop application.

Import

Item	Version
Microsoft Outlook	2003~2019. For Office 365, only supports desktop application.
ACT!	2011~2019(v21)
Lotus Notes	v6.5~v9.0
WorldCard Data Exchange File	wcxf / wcf
Image Files	Jpeg
CSV File	all
vCard File	2.1/3.0
Dropbox Space	all

Export

Item	Version
Microsoft Outlook	2003~2019. For Office 365, only supports desktop application.
ACT!	2011~2019(v21)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all
Salesforce Leads (Enterprise / Unlimited)	all
Microsoft Excel	2003~2019. For Office 365, only supports desktop application.
Image Files	Jpeg
Text File	all
Company Address Book	Office 365 / Exchange
CSV File	all
vCard File	2.1/3.0

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.

10.2.1 Find Duplicate Contacts / Contacts of The Same Name

Go to [Run] / [Find duplicate] / [Delete Duplicate Contacts] or [Merge Duplicate Contacts]. The system will check all information and list the duplicate contacts. Please confirm the contents and select [Delete] or [Merge] to simplify the list.

Tips: When deleting duplicate contacts, system will keep the latest information, in case user delete the information by mistake.

10.2.2 Merge or Delete Duplicate Contacts / Contacts of The Same Name

Go to [Run] / [Find contacts of same name] / [Delete contacts of same name] or [Merge contacts of same name]. The system will check all information and list the duplicate contacts. Please confirm the contents and select [Delete] or [Merge] to simplify the list.

Tips: When deleting duplicate contacts, system will keep the latest information, in case user delete the information by mistake.

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 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 Display

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

11.2.2 Font Size

You can adjust the font size to display.

11.2.3 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

11.2.4 Email Deliver Format

You can send email with Lotus Notes or not.

11.2.5 Auto Update Settings

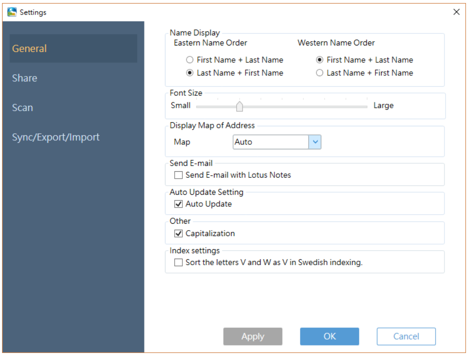
You will receive notification when there is update for WorldCard Team, you can turn auto update on for auto update.

11.2.6 Capitalize for Surname

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

11.2.7 Sort the Letters V and W as V in Swedish Indexing

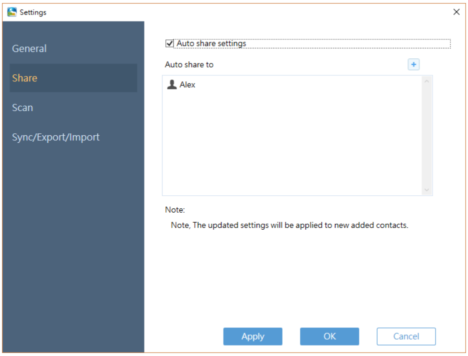
When checked, in the Swedish indexing, the order of the letters V and W will be all taken as V.



11.3 Contacts Sharing 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 .

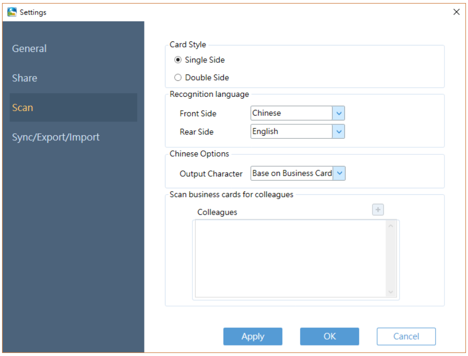


11.4 Scan Settings

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

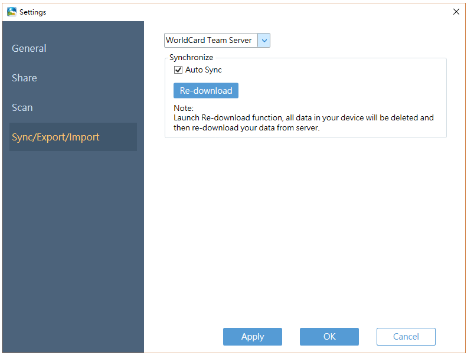
Also, if you have the permission to scan for supervisor or colleague, you can select contacts to share with. Click to add contacts to share list and the system will auto share to those users when you add new contacts.

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



11.5 Sync / Import / Export Settings

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



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