

PenPower WorldCard User Manual

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Chapter 1 Getting Started

1.1 Installation

1.1.1 System Requirements

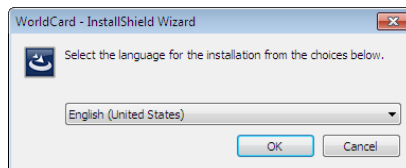
- Windows 10/8/7/XP SP3

1.1.2 Software Installation

Insert the WorldCard CD-ROM into the disk drive. The [Setup.exe] program will start automatically to install the WorldCard software.

Note: If you don't have CD-ROM drive, or you lost your CD-ROM disc, please go to PenPower's website (<http://www.penpower.net>) and choose your country/region to download the software.

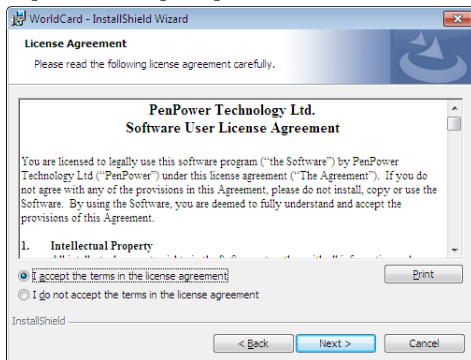
1. Select the language on the Installation Wizard and click [Next].



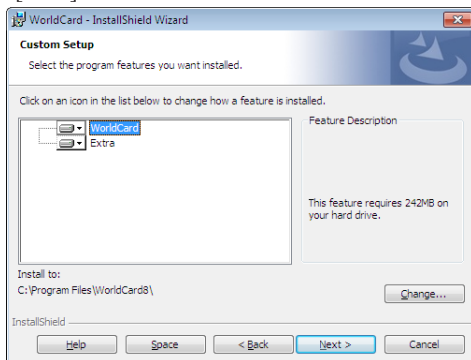
2. Click [Next] to continue.



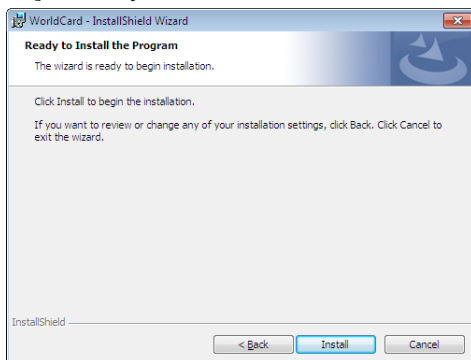
3. Please read the user license agreement carefully. Then click [I accept the terms in license agreement]. Then click [Next].

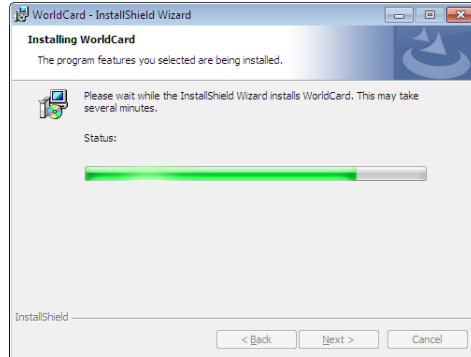


4. Select the default installation folder, or click [Browse] to select other installation folder and click [Next].

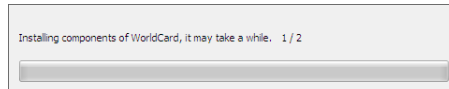


5. Click [Install] to begin the installation. If you'd like to change the installation folder, please click [Back] to modify it.

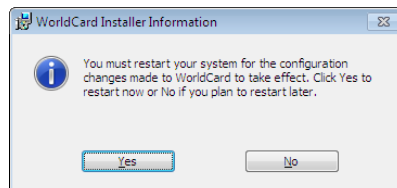




6. During the installation, it will also install [Microsoft .NET Framework], the WorldCard essential component.



7. After the installation, we suggest you to select [Yes] to restart your computer to finish the installation.

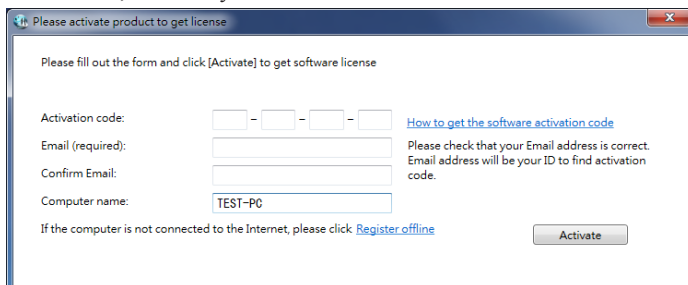


1.2 Launch WorldCard

You can execute [Start/All Programs/WorldCard/WorldCard v8], or just click [WorldCard v8] shortcut  to launch the program.

1.3 Software Activation

You can find an activation code in the package. Please activate the software with this Windows version activation code to obtain a license. Enter the activation code and required information, and then you can start to use WorldCard.



Please activate product to get license

Please fill out the form and click [Activate] to get software license

Activation code: - - - [How to get the software activation code](#)

Email (required):

Confirm Email:

Computer name:

Please check that your Email address is correct.
Email address will be your ID to find activation code.

If the computer is not connected to the Internet, please click [Register offline](#)

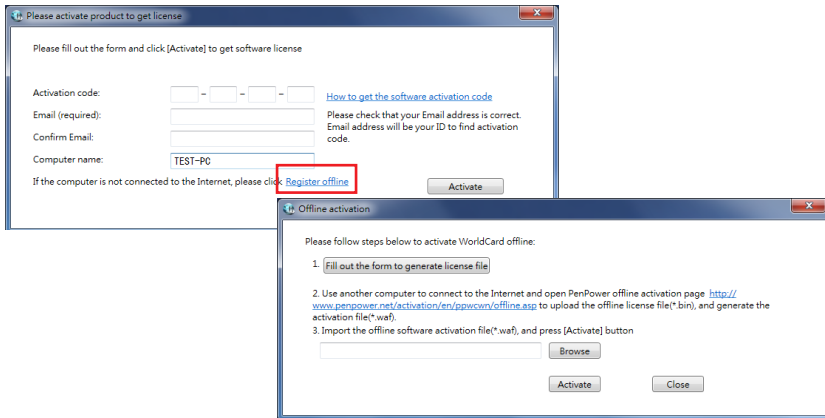
① How to get the software activation code

Please click [How to get the software activation code](#) if you did not find the activation code in the package, or forgot your activation code, or want to buy more activation codes.



● Activate without Internet

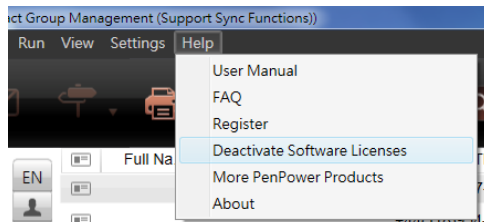
Internet connection is required for software activation. If you do not have Internet, please click [Register Offline] and follow the instructions to activate the software.



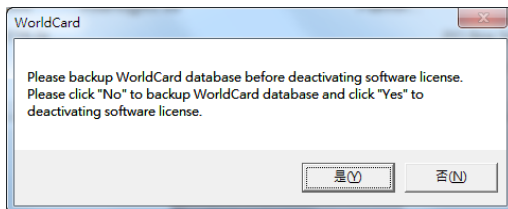
1.4 Software Deactivation

When you need to transfer the license to another computer, you have to deactivate from the current computer first, and then you will be able to use the same code to activate on the new computer.

1. Please click [Help]/[Deactivate Software License] when you need to transfer the software license.

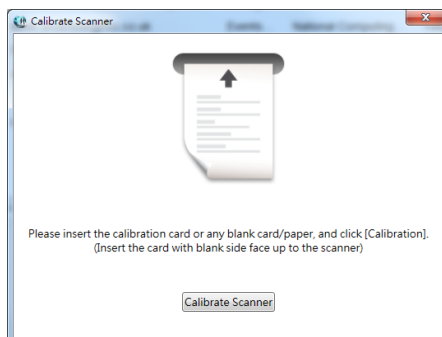


2. At this time, the software will remind you to backup card information, if you click [No], the backup window will appear for you to backup; if you don't need to backup, just click [Yes] to open the deactivate web page, please enter the activation code and follow the instruction to deactivate.



1.5 Scanner Calibration

If you are using WorldCard Color / Office model, the software will automatically launch the calibration wizard. Please insert the card calibration card and click [OK] to start. After that, it won't produce color deviation to affects recognition results.



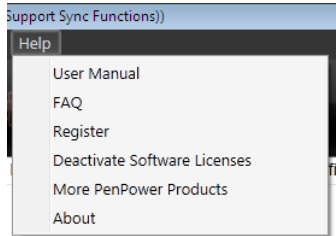
After you find the color of scanned image has a problem, you can click [Run] / [Calibration] to calibrate anytime.

NOTE: Place the calibration card with the blank face down, and follow the arrow to insert the calibration card. WorldCard Pro model no needs to calibrate, but if there is any color deviation, you can still use the calibration card with the blank face up. If the calibration card is lost, please use blank paper instead of a business card to calibrate.

1.6 Online Help

WorldCard provides excellent online help information:

1. Click [Help/User Manual] to find the user manual.



2. If you encounter a problem when using WorldCard, you can refer to [Help/FAQ] to find answers to similar questions. You can also click [Help/About/Customer Mailbox] to E-mail a description of your problem or your opinions to PenPower's Customer Service. Your E-mail software will be launched and relevant computer environment information will be attached in the email to help us to resolve your problems.
3. Click [Help/Register] to register for receiving warranty service.

Chapter 2 Add Contacts

2.1 Add Contact Using Scanner

2.1.1 Connect Scanner

WorldCard, the program, works with your WorldCard Pro scanner. Please refer to the following explanation to learn about how to operate WorldCard Pro scanner.

Please plug the USB connector of the scanner into the USB jack on the computer. Put the card into the scanner with the text facing up, the light will continually blink during scanning. When the light stops blinking, you can proceed to scan the back of the card. Or just click [Skip Back] and continue to scan the next card.

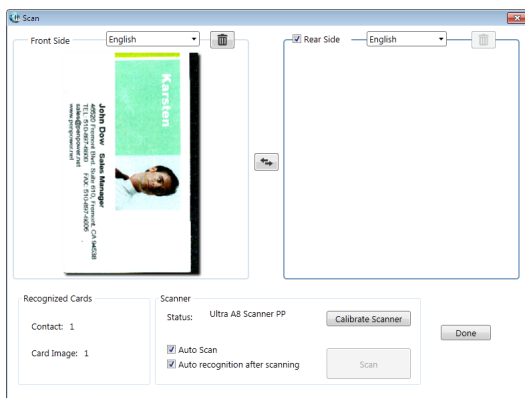


Tip: Click [Settings]/[Scanning Option] to set the recognition language or other settings. For more information, please refer to 9.2, [Scanning Option].

2.1.2 Scan Wizard

You can scan the card via the Scan Wizard. WorldCard will recognize the text on the card to transform your cards into digital data.

Click  on the Quick Tool Bar and select the front side recognition language of the card, if you'd like to scan the back of the card, please check [Rear Side] and select the rear side recognition language of the card. Start to scan the front side and then the back side of the card. Click [Done] and you will see the contacts you just scanned showing in the contact list.



Tips:

1. *Auto Scan: When you open the scan wizard you can begin to scan the card immediately. If [Auto Scan] is unchecked, you need to trigger the scanner by clicking the [Scan] button.*
2. *Auto recognition after scanning: It will automatically recognize the card after scanning. When [Auto recognition after scanning] is unchecked, you can review the image to see if it's clear or not. If it's unclear, you can scan again and then click [Finish], the application will recognize your card.*
3. *If you don't like the card image, you can click  to delete it.*
4. *You can click  in the middle to swap the front side and the back side of the card.*

2.2 Add Contact Manually

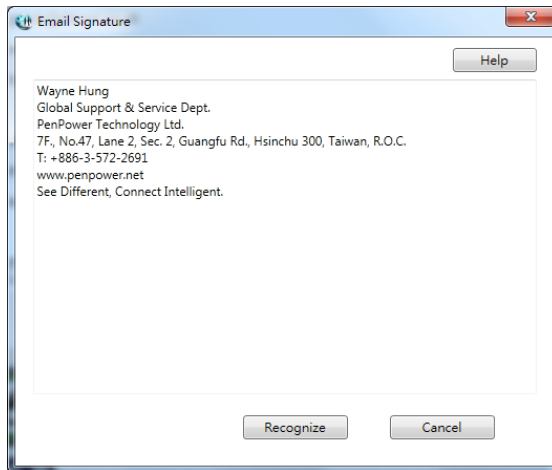
On the main screen, click [Management]/[Contact]/[Add a Contact - Manually] to add a contact manually. A blank Editing Page will be opened. You can add contact information into the empty fields.

2.3 Add Contact from Same Company

When you want to add a contact who is from the same company as another contact, you can first select the existing contact and then click [Management]/[Contact]/[Add a Contact - From Same Company]. The company name, address, phone number, fax number and website link will already been filled in. You only need to fill in other personal information.

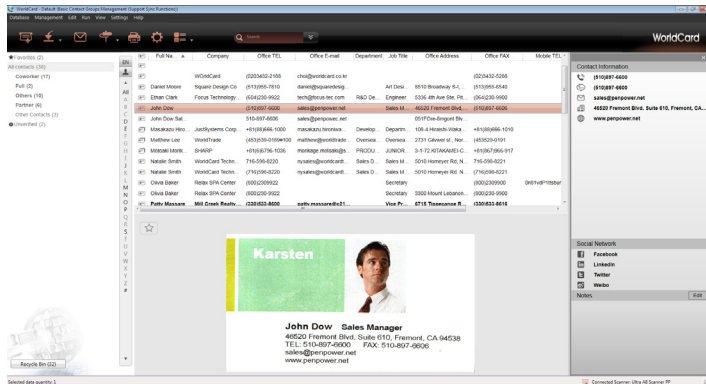
2.4 Add Contact from Email Signature

You can add a contact by using an Email Signature you received in E-mail. You can click [Management]/[Contact]/[Add a Contact - Email Signature] to open the [Email Signature] dialogue window. Then copy the signature in the email and paste in the text area of the Email Signature dialogue window (shown as below). Click [Recognize] button and you can see the recognized contact information in the editing page.



Chapter 3 Edit Contacts

To modify recognition result of a scanned card or to add additional information, you can select one contact and click to open the editing page.

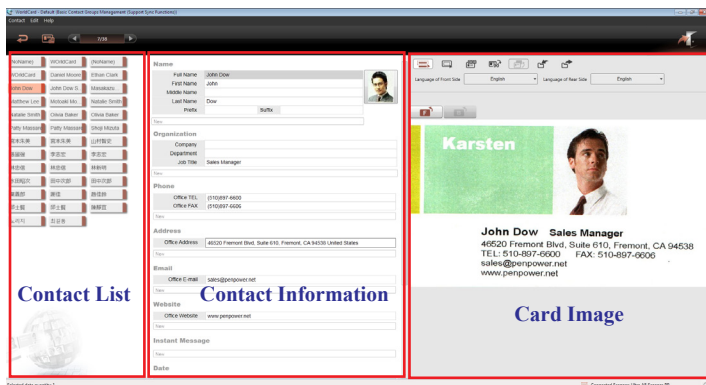


Tip: Click [Management]/[Contact] in the drop-down main menu, you can merge two contacts into one, or divide one contact into two contacts.

3.1 Editing Page

Click on the contact you wish to edit in the main screen and go to the editing page. There are three areas in the editing page: [Contact list], [Information] and [Card Image]. When you are done, click  to exist the editing page. Changes you made are saved automatically. If you'd like to undo your edits, click  or [Edit]/[Undo]. Click [Contact]/[Add a Contact - Manually] to add a contact by yourself.

To add a contact who is in the same company, please click  or [Management]/[Contact]/[Add a Contact - From Same Company], the application will add a new contact with the company name, address, phone number automatically filled in.



3.1.1 Groups Pane

On the editing page, the contact list area shows you contacts in the same group to let you quickly switch between contacts. You can click [Expand all data] button to expand the contact list. Note that all changes made to the existing contact will be saved when you click on another contact. If you do not wish your edits to be saved, please remember to click before switching to a different contact.

3.1.2 Edit Contact Information

In the contact information area, you can modify any columns you want by clicking on the content you would like to modify.

Add a Photo: Click the photo icon next to the name column. To change or delete the photo, click the photo again.

Name	
Full Name	John Dow
First Name	John
Middle Name	
Last Name	Dow
Prefix	Suffix



Arrange the column order: If there are more than one name or company information, click  to arrange the order.

Change how the address displays: Click the drop-down menu of the address column to choose different format for address display.

Connect with contact: You can click on icons next to the designated columns to call or send E-mail. You can also directly open a contact's website.

3.1.3 Edit the Card Image

If contact has a card image, you can see it in the lower-right corner of the editing page. You can execute functions below:

Click  to view the front/back side of the card.

Click  to rotate the card image to 90 degrees.

Click  to add image or scan business card.

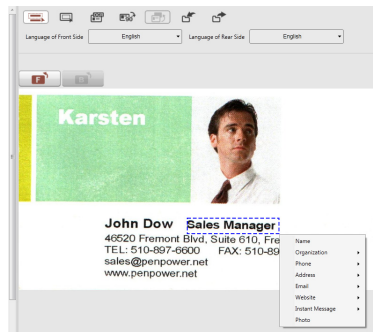
Click  to save the card image.

When you place the cursor on the card image, click  to zoom in or  to zoom out. Click  to return the image to default size.

For more functions, please refer the explanations below:

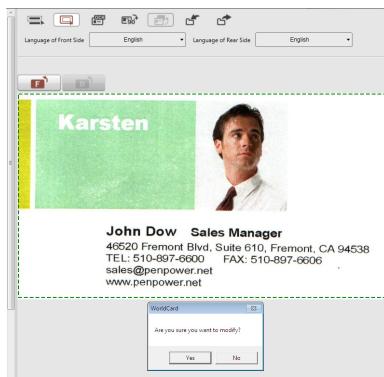
⦿ Recognizing Partial Content of a Card Entry

In some cases, the information of a business card may not be completely recognized. You may use the Partially Select and Recognize command of the Edit window. To select partially select and recognize, click this icon . After clicking the partially select and recognize, you can use the mouse to select the specific area that contains the correct data. After selecting the area, select the appropriate field for the information which has been highlighted.



⦿ Reframing Command

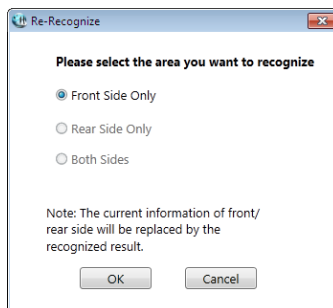
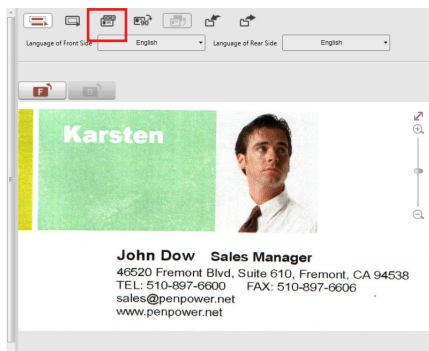
The reframing manually command  allows you to select a specific area of a business card to save. After the appropriate area is selected, a box will be drawn around the selected data. If the data selected to be modified is correct, click Yes in the dialog box. The data outside of the selection box will be cut off.



Re-Recognize Entire Card

When you want to conduct a re-recognition on a card image, you can click  or [Edit]/[Re-Recognize]. Make sure you have first selected the correct language for both sides of the card. WorldCard will prompt you to select the side or sides you wish to conduct recognition again. Select and then simply click [OK].

Note that the existing card information will be replaced by the re-recognition result.



Tip: If the business card is double sided, you can click  button to switch the front side and back side.

3.2 Clean or Restore Deleted Contacts

You can delete a contact in the main window. If you want to delete selected contact, simply right-click on a contact and select **[Delete]** from the pop-up menu. The contact will be moved to **[Recycle Bin]** in the lower-left corner of the screen.

Click **[Recycle Bin]** button to view the contacts that have been deleted. You can delete the contacts permanently by right-clicking the contacts and selecting **[Delete]**. If you want to restore the deleted contacts, just click **[Recycle Bin]** to enter, and select the contacts to restore by right-clicking on them and select **[Undo]**.

Tip: The shortcut to restore the deleted contacts is [Ctrl]+[z].

Chapter 4 Manage Groups

You can manage contacts by categorizing them into different groups. Each contact can be categorized into only one or more than one group.

4.1 WorldCard's Default Groups

WorldCard is designed with several default groups, including [All contacts], [Unverified], [Favorites], [Other Contacts] and [Google's Default Groups]. These default groups can't be deleted or renamed.

Unverified: Contacts that have not been manually checked are automatically categorized into this group. To move contacts out of this group, you can either double-click to open its editing page, or click [Edit]/[Mark as Edited].

Favorites: You can click , located above the card image, to add the contact into the [Favorites] group. Click  again to remove the contact from the group.

Other Contacts: A contact without any group information is automatically categorized in the [Other Contacts] group.

Google Default Groups: After synchronizing with Google, Google's default groups, such as My Contacts, Family, Friends, and Coworkers, will be added as default groups.

4.2 Add New Group

1. To add a new group, you can click [Management]/[Group]/[New Group].
2. Type the group name in the Groups Pane on the main screen's left side.

Note: A new group cannot have the same name as an existing group.

Tip: You can also first select one or more contacts, and then click [Management]/[Contact]/[Manage Group of a Contact] to place selected contacts into one or more groups. On the [Manage Group] dialogue window, you can click [New Group] to create a group.

4.3 Delete Group

You have three ways to delete groups. Contacts that are left without a group will be moved to the [Other Contacts] default group. Select the group you wish to delete and then choose one of the following ways to delete it:

1. Click [Management]/[Group]/[Delete Group].
2. In the groups pane on the left, right-click on the group you'd like to delete and select [Delete Group].
3. Select a contact and then click [Management]/[Contact]/[Manage Group of a Contact]. Select the groups you'd like to delete and click [Delete Group] button. You can also set a group for the contact.

Note: After you delete a group, only those contacts that are left without a group will be moved to the [Unfiled] default group. If a contact belongs to another group, then you can find the contact in the other group. If a contact in the deleted group doesn't belong to any other group, then the contact will be move to the [Other Contacts] group.

4.4 Change Group Name

You have three ways to modify a group's name:

1. First select a group in the Groups Pane on the left, and then click [Management]/[Group]/[Rename Group].
2. Directly right-click a group you wish to rename on the Groups Pane, and then select [Rename Group].
3. Select a contact and then click [Management]/[Contact]/[Manage Group of a Contact]. Select the groups you'd like to rename and click [Rename Group] button. You can also set a group for the contact.

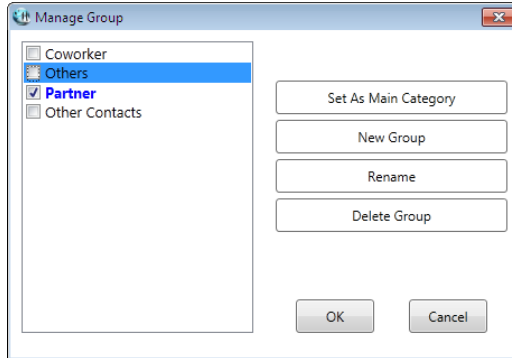
Note: The renamed group name cannot have the same name as an existing group

4.5 Set Contact in Multiple Groups

You have two ways to set groups for the contact. Select a contact and then choose one of the following ways to set the group:

1. If you want to remove a contact from one group to another group, you can directly drag the contact into a new group in the Groups Pane on the left of the main screen.

- If you want one or more contacts to exist in multiple groups, you can use the [Manage Group] dialogue window. To access the [Manage Group] dialogue window, you can first select contact and then click [Management]/[Contact]/[Manage Group of a Contact] or directly right-click a contact in the main screen to click [Setting Group]. On the [Manage Group] dialogue window, you can modify the group categorization through checking or unchecking each group. Finally, click [OK].

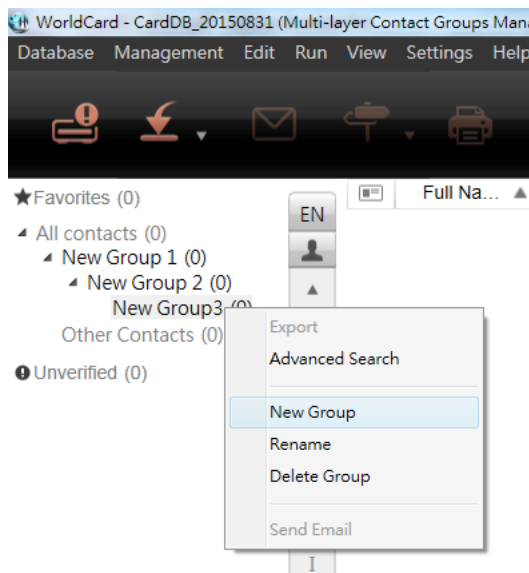


Tip: When syncing with other contact management tools, please note that some software cannot allow contacts to be categorized in more than one group. Therefore, to ensure compatibility with other systems, you can set a main category for the contact by clicking [Set as Main Category] on the [Manage Group] dialogue window. When you import your contacts into other software, you will find that contact categorized in the group you set as the main category.

4.6 Multi-layer Contact Groups Management

There are two types group management styles available in WorldCard. Besides the Basic Contact Groups Management Database, WorldCard also provides Multi-layer Contact Groups Management Database. The WorldCard's default is the former, which uses a single-layer structure to manage contacts. The latter database uses a multi-layer structure to manage contacts.

You can create a new multi-layer contact groups management database by clicking [Database]/[Create New Database]/[Multi-layer Contact Groups Management]. However, there are several important restrictions associated with a Multi-layer Contact Groups Management Database.



Note:

1. *All sync functions are disabled in multi-layer contact groups management database.*
2. *Multi-layer Contact Groups Management Database cannot be transferred into a Basic Contact Groups Management Database.*
3. *The group name in the same level cannot be the same.*
4. *When a parent group is deleted, all sub-groups will also be deleted.*
5. *Each contact can only be categorized into one group in Multi-layer Contact Groups Management Database.*

Chapter 5 Search Contacts

5.1 Quick Search

You can conduct a quick search by entering a keyword into the search field

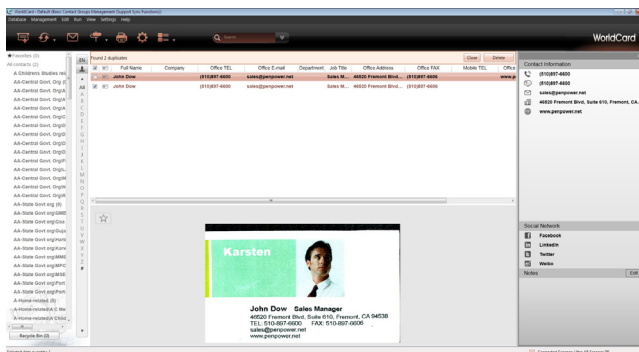
 Search on the main screen. Click  to exit the search mode.

5.2 Advanced Search

Click [Advanced Search] button  or [Run]/[Advanced Search] to set advanced search conditions. You can type keywords in specified field area, such as organization or E-mail, to locate specific contacts. You can also set other search conditions, including Group or Timestamp. To access the [Advanced Search] dialogue window, you can also directly right-click a group on the Groups Pane and select [Advanced Search] to search within that group.

5.3 Find Duplicates

Click [Run]/[Find Duplicates] to filter duplicates. If you wish to delete duplicates, click [Delete]. Only one contact will remain for each set of duplicated contacts. If you wish to manually choose which duplicated contacts to delete, right-click the contact and select [Delete]. Click [Close] on the top of the list to go back to the view.



Chapter 6 Sync/Import/Export with Other Contact Management System

The functions of Import/Export/Sync help you to use the contact information in other applications.

For example, if you usually add information on WorldCard, and only want to use these data in Outlook, then you can just export data from WorldCard to Outlook; if you'd like to add/delete/edit information on both sides, then you can sync WorldCard and Outlook to keep them updated.

Note: WorldCard only supports certain versions of software. See 6.5 for a complete list of supported versions. For example, WorldCard only supports ACT! 2011~2015(v17) and Salesforce of the Enterprise/Unlimited version.

6.1 Relevant Settings

Before syncing, you have to first connect to an account by inputting account ID and password. To do so, you can click [Settings] in the drop-down main menu, or click  on the Quick Tool Bar.

● Gmail Contacts

Setting ID: Click [Set up account] to enter your Gmail account and password.

● Outlook Contacts

Sync Folder: Click [Browse] and select the folder of the contacts you would like to sync.

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

● ACT!

Setting ID: Enter your ACT! account and password and click [Browse] to select DB Path.

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

● Lotus Notes

Connect Account: Click [Browse] to select DB Path.

● Salesforce

Connect Account: Enter your Salesforce account, password and Security token to log into your account.

● wexf file/wcf file

Filter Duplicates: You can check [Find Duplicates] when you import from DBank Space or Dropbox Space to filter through duplicates. Only the latest contact will be kept.

Convert group information when importing: Your imported contacts may be in a hierarchical categorization. WorldCard does not support this type of classification. You would need to choose a way to categorize groups in WorldCard by either clicking [Merge multi-layer as single] to combine all the names in each layer, or click [Keep the First Layer Only] to take the first layer's name to be the group names in WorldCard.

● DBank Space/Dropbox Space

Filter Duplicates: You can check [Filter Duplicates] when you import from DBank Space or Dropbox Space to filter through duplicates. Only the latest contact will be kept.

Convert group information when importing: Your imported contacts may be in a hierarchical categorization. WorldCard does not support this type of classification. You would need to choose a way to categorize groups in WorldCard by either clicking [Merge multi-layer as single] to combine all the names in each layer, or click [Keep the First Layer Only] to take the first layer's name to be the group names in WorldCard.

● Microsoft Excel

Export: Check the columns you'd like to display from Available Fields. Click the item in Displayed Field, you can click [Move Up] and [Move Down] to arrange the display order. Click [Remove] to remove the displayed column. Click [Default] to restore to the original settings.

● Text File

Export: Check the columns you'd like to display from Available Fields. Click the item in Displayed Field, you can click [Move Up] and [Move Down] to arrange the display order. Click [Remove] to remove the displayed column. Click [Default] to restore to the original settings.

● CSV File

Export: Check the columns you'd like to display from Available Fields. Click the item in Displayed Field, you can click [Move Up] and [Move Down] to arrange the display

order. Click [Remove] to remove the displayed column. Click [Default] to restore to the original settings.

6.2 Sync

You can sync contacts between WorldCard and other contact management systems, including Microsoft Outlook, ACT!, Lotus Notes, Salesforce, WorldCard Data Exchange File (*.wexf), WorldCard v6 File (*.wcf), Card image file to help you manage your contacts.

The moment when you synchronize WorldCard with a Gmail account, data on both sides will be the same. For example, if you clear all the contacts on one side, the next synchronization will remove all the contacts on the other side as well.

To start synchronization, click [Management]/[Synchronize] or click  on the Quick Tool Bar. Then select one of the following sync options:

- Google Contacts/ ACT! /Salesforce(Contacts)

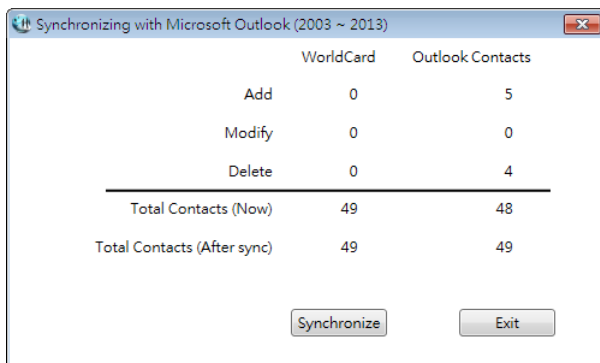
Select one of the sync targets and log into your account. The application will tell you how many contacts have been added, modified or deleted on each side. If you wish to sync again, simply click [Synchronize]. You can also click [Exit] to close the dialogue window.

- Microsoft Outlook/Lotus Notes

Select one of the sync targets and specify the sync directory. The application will tell you how many contacts have been added, modified or deleted on each side. If you wish to sync again, simply click [Synchronize]. You can also click [Exit] to close the dialogue window.

Note: If after establishing synchronization relationship, you wish to modify one side without affecting the other, you can click [Delete Sync Record] in the Settings dialogue window to remove the synchronization relationship. Note, however, that if you re-initiate the synchronization relationship, duplicated contacts can appear.

If you wish to establish an automatic synchronization relationship between a contact management system and WorldCard, make sure to check [Auto Sync] in the Settings dialogue window. You can access the Settings dialogue window by clicking [Settings]/[Sync,Export,Import]. You can see the sync status in the lower right corner of the main screen.



	WorldCard	Outlook Contacts
Add	0	5
Modify	0	0
Delete	0	4
Total Contacts (Now)	49	48
Total Contacts (After sync)	49	49

6.3 Import

WorldCard supports many import sources, including Microsoft Outlook, ACT!, Lotus Notes, Salesforce, WorldCard Data Exchange File (*.wxf), WorldCard v6 File (*.wcf), card image file, DBank Space, Dropbox Space, CSV File (*.csv) and vCard File (*.vcf). You can import these files and manage contacts in WorldCard.

To start importing, click [Management]/[Import] or  on the Quick Tool Bar. Then select one of the following import sources:

- Microsoft Outlook/Lotus Notes

Select Microsoft Outlook/Lotus Notes and click [Next]. Then select the source for import. The application will begin the import process. You can find imported contacts added into the group [All Contacts].

- ACT!/Salesforce

Select ACT!/Salesforce and click [Next]. Specify the database path, and log into the account to import contacts. You can find the imported contacts added into the group [All Contacts].

- WorldCard Data Exchange File (*.wxf)/ WorldCard v6 (*.wcf)

WorldCard Data Exchange File helps you manage contacts on different platforms of PenPower's products. WorldCard Data Exchange File is the best option for those products that do not support Google sync function.

Select WorldCard Data Exchange File/WorldCard v6 and choose the file to import. You can find the imported contacts added into the group [All Contacts].

● DBank Space/Dropbox Space

Select DBank Space/Dropbox Space and click [Next]. Log in to the account and choose the wcxfile you want to import. Then, click [OK] to start the import process. You can find the imported contacts in the groups, [All Contacts] or [Unfiled].

Tip: Check [Keep Original Group], imported contacts will remain its group information and import these groups into WorldCard. You can also click [X] next to the file to delete the wcxfile you don't need.

● Image Files (*.jpeg)

Select [Image Files] and click [Next]. Choose the import file and the recognition language. After import, you can find the imported contacts in the groups, [All Contacts] or [Unfiled].

● CSV File (*.csv)

Select CSV File and click [Next]. Choose the file you want to import and click [OK]. Then, you will see many fields with [Ignore] on them. Open the drop-down menu and choose the title that fits with your contacts' information below the fields. When you are done with the fields' format, please click [OK] to start the import process. You can find the imported contacts in the groups, [All Contacts] or [Unfiled].

Tip: After finishing the fields' format, you can click [Save As] to save the template so you won't have to reset the format again.

Note: If the first line of your CSV file includes contacts' information you want to import, please check [Import first row data].

● vCard File (*.vcf)

Select vCard File and click [Next]. Select the file you want to import and click [OK] to start the import process. You can find the imported contacts in the groups, [All Contacts] or [Unfiled].

Note: The format that WorldCard supports are vCard v2.1/3.0.

6.4 Export

Export contacts of WorldCard in different scopes and different file formats. Select [WorldCard] data range, all of contacts in WorldCard will be exported. Select [All cards in the preview area] data range, contacts in the view you saw will be exported.

Select [Selected Record] data range, contacts you selected will be exported.

Notes:

- 1. Before export, set the required information first, like account, password, directory, filter duplicated contacts or some related settings. Please refer to 7.1.3, Sync, Import, Export.*
- 2. Some softwares may not work because WorldCard doesn't support its version, for example: WorldCard only supports ACT! 2011~2015(v17), Salesforce of the Enterprise / Unlimited version.*

Execute [Management]/[Export], [Ctrl]+[e] or  on the tool bar and select one of the following ways:

- Microsoft Outlook/Lotus Notes

Select [Microsoft Outlook/Lotus Notes] and the data range, and then specify the export directory. You can see the contacts you just exported in Microsoft Outlook/Lotus Notes.

- ACT!/Salesforce

Select [ACT!/Salesforce] and the data range. Then, log in to the account and specify the export database path. You can see the contacts you just exported in ACT!/Salesforce.

- WorldCard Data Exchange File(*.wxf)/Image Files(*.jpeg)/Microsoft Excel/Text Files(*.txt)/CSV Files(*.csv)

Select one of the ways above and the data range, and specify the export file folder and you can see the files in the folder.

Tip: When export to CSV files, you can choose ANSI(default) or Unicode to encode files.

- DBank Space/Dropbox Space

Select DBank Space/Dropbox Space and click [Next]. Choose the data range and click [Next] again. Then, log in to the account and click [OK] to export the wxf file. You can find the exported wxf file in your DBank Space or Dropbox Space.

- vCard File (*.vcf)

Select vCard File and the data range and select. Specify the export database path. You can see the contacts you exported in the database path.

Note: vCard v3.0 provides two encode format to support the export process: Google Contacts/Mac Contacts vCard(Unicode) and MS Outlook vCard(ANSI).

6.5 WorldCard Data Exchange Compatibility List

WorldCard Synchronization

Item	Version
Gmail Contacts	all
Microsoft Outlook	2003~2016
ACT!	2011~2015(v17)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all

WorldCard Import

Item	Version
Microsoft Outlook	(2003 ~ 2016)
ACT!	2011~2015(v17)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all
WorldCard Data Exchange File (wxcf)	all
DBank	all
Dropbox	all
Image Files (JPG)	all
CSV Files	all
vCard Files	2.1/3.0

WorldCard Export

Item	Version
Microsoft Outlook	(2003 ~ 2016)
ACT!	2011~2015(v17)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all
Salesforce Leads (Enterprise / Unlimited)	all
WorldCard Data Exchange File (wxcf)	all
DBank	all
Dropbox	all
Image Files (jpg)	all
Microsoft Excel	2003~2016
Text Files	all
CSV Files	all
vCard Files	3.0

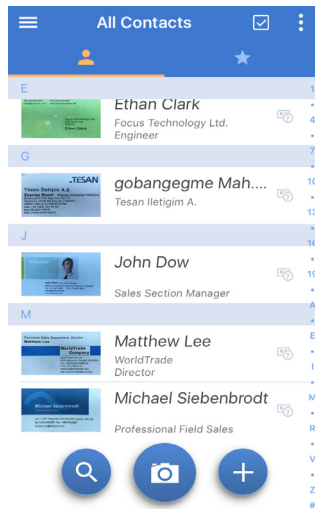
Chapter 7 Sync/Import/Export With Mobile Devices

You can sync WorldCard contacts with your mobile devices (via WorldCard Mobile app on iPhone and Android) through the sync function of Google Contacts. You can also use WorldCard Data Exchange File (*.wxf) to share your contacts.

Note: See Chapter 6 for more information about how to sync/import/export on your computer.

7.1 iPhone

If you have iPhone, you can search for “WorldCard Mobile” app on APP Store to download it. Tap on the app to open WorldCard Mobile’s main page.



7.1.1 Sync

1. Tap the  icon on the main screen to open the menu, and tap [Sign In] to enter your Gmail account/password, and then accept the authorizations that WorldCard Mobile asked for.

2. Before having the first synchronization, please tap [Auto Sync] to choose to let WorldCard Mobile sync with Gmail contacts automatically when there is Wi-Fi or mobile network connected, or when only Wi-Fi connected can do the synchronization.
3. After setting, tap [Sync] or drag down the screen when in the contacts list, the WorldCard Mobile will start to sync.

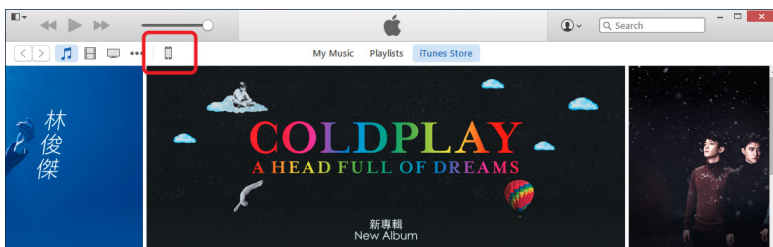
Note: After first syncing, the category list will be added a few default categories that belongs to Gmail contacts, please note these categories are not able to be deleted.

7.1.2 Import

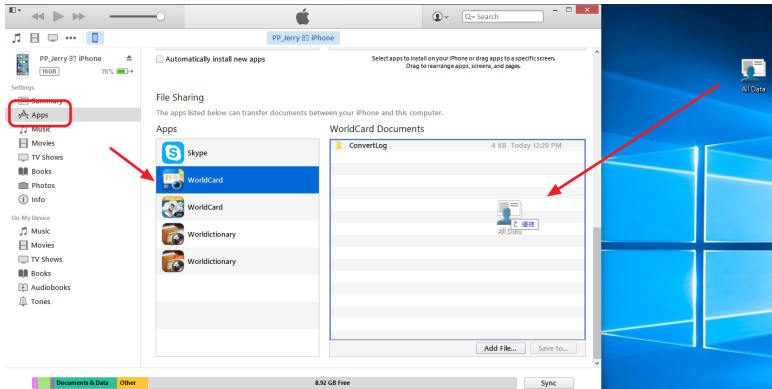
● Import wxf, vcf, csv file from computer

If you want to import the exported wxf, vcf, csv file into iPhone's WorldCard Mobile, you have to import it via iTunes. The following steps are the instructions for importing wxf. file into iPhone:

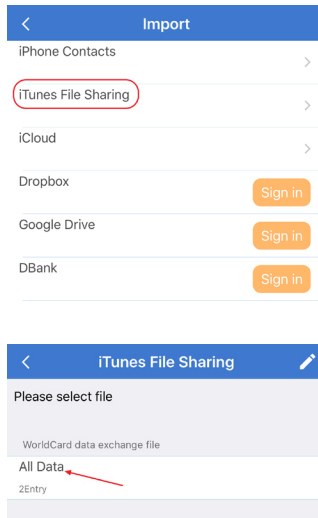
1. Please connect your iPhone with the computer and open iTunes. Then, tap the iPhone device button.



2. When you enter the summary page, please tap [Apps] to switch to app page, and go to File Sharing section to search for WorldCard app and click it. You will see all the files of WorldCard in the document storage area. Select and drag the exported wxf. file into the document storage area.



- Open WorldCard Mobile, and then tap the  icon on the main screen, and choose [Import], and choose [iTunes File Sharing], then you will see the file you just dragged in.



- After confirming the file name, please tap  to start importing.
- When the import progress is done, you can find the imported contacts' information in WorldCard Mobile's contact list.

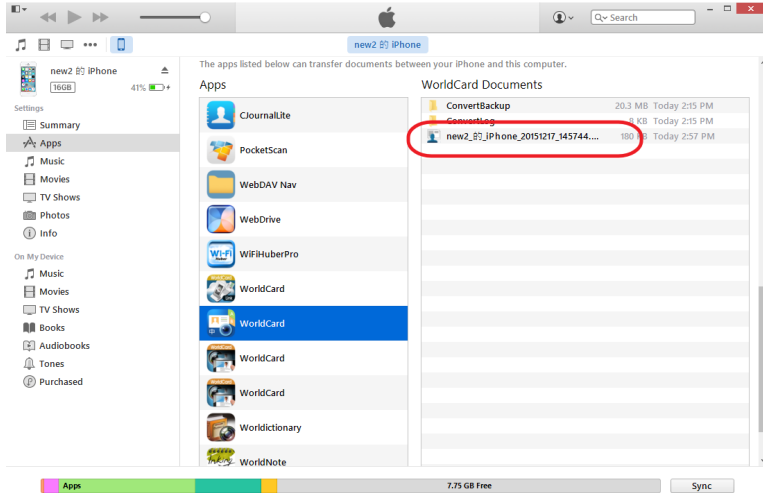
● Import wcx, vcf, csv file from Cloud storage

1. Tap the  icon on the main screen, and choose [Import] to choose to import the contacts from cloud storage. Tap  to start importing after you select the files.
2. The file formats that WorldCard Mobile supported are: WorldCard Exchange File (*.wxc) and vCard file(*.vcf). When you choose to import from cloud storage, WorldCard Mobile will search and list all the usable files. Moreover, the first time you choose to import from cloud storage, it will ask you to enter the account/ password of the cloud storage to access.

7.1.3 Export

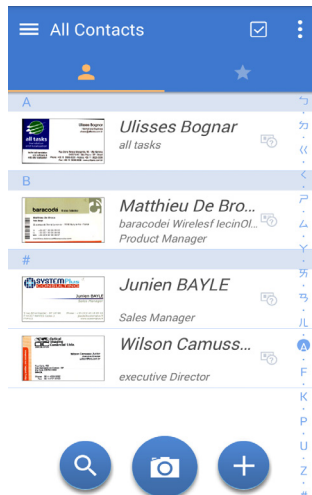
● Export wcx, vcf, csv file to computer

1. Tap  icon on the main page to select the contacts which you want to export.
2. Tap  icon to open the menu and choose [Export].
3. Choose the location to save the exported file, E.g. Dropbox, then you can decide to export the contacts into WorldCard Exchange File (*.wxc), vCard file(*.vcf) or CSV file(*.csv).
4. When the export success message pops out, you can connect your phone and the computer to find the exported file. Open iTunes and tap the iPhone device button.
5. When you enter the summary page, please tap [Apps] to switch to app page.
6. Go to File Sharing section to search for WorldCard app and tap it. You will see all the exported files of WorldCard in the document storage area. Select the file you want to export and tap [Save to...]. Then, you can save the exported file to the computer and open it with WorldCard software.



7.2 Android

If you have Android phone, you can search for “WorldCard Mobile” app in Google Play and download it. Tap on the app and open WorldCard Mobile’s main page.



7.2.1 Synchronize Gmail Contacts

1. Tap the  icon on the main screen to open the menu, and tap [Sign In] to enter your Gmail account/password, and then accept the authorizations that WorldCard Mobile asked for.
2. Before having the first synchronization, please tap [Auto Sync] to choose to let WorldCard Mobile sync with Gmail contacts automatically when there is Wi-Fi or mobile network connected, or when only Wi-Fi connected can do the synchronization.
3. After setting, tap [Sync] or drag down the screen when in the contacts list, the WorldCard Mobile will start to sync.

Note: After first syncing, the category list will be added a few default categories that belongs to Gmail contacts, please note these categories are not able to be deleted.

7.2.2 Import

● Import Contact File

3. Tap the  icon on the main screen, and choose [Import File] to choose to import the contacts in the phone, or import the contact files from the local storage or cloud storage. Tap  to start importing after you select the files.
4. The file formats that WorldCard Mobile supported are: WorldCard Exchange File (*.wxf) and vCard file (*.vcf). When you choose to import from local storage, WorldCard Mobile will search and list all the usable files. Moreover, the first time you choose to import from cloud storage, it will ask you to enter the account/password of the cloud storage to access.

7.2.3 Export

● Export wxf, vcf, csv file to computer

1. Tap  icon on the main page to select the contacts which you want to export.
2. Tap  icon to open the menu and choose [Export].

3. Choose the location to save the exported file, E.g. Dropbox, then you can decide to export the contacts into WorldCard Exchange File (*.wexf), vCard file(*.vcf) or CSV file(*.csv).
4. Connect the phone with your computer then open the folder of WorldCard Mobile in the phone's memory card and you can find the exported file.

Chapter 8 Direct Actions to Contact

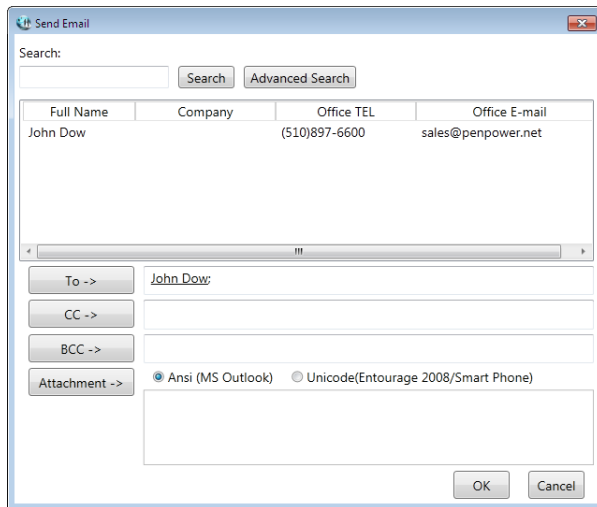
On WorldCard, you are able to directly engage with your contacts through various functions. You can send E-mail, call through Skype, open website, plan routes or search contact on social networking sites.

8.1 Send E-mail

To send email to the contacts, right-click on the contact and select [Send email] or click , the window of mail setting will show.

On the E-mail dialogue window, you can first click [To], [CC], [BCC] or [Attachment], and fill in by selecting contact(s). WorldCard will add the E-mail addresses of the selected contacts into your default E-mail software.

If you need extra recipients, enter the keyword in the upper search bar to search.



Send Email

Search:

Full Name	Company	Office TEL	Office E-mail
John Dow		(510)897-6600	sales@penpower.net

To ->

CC ->

BCC ->

Attachment ->

☒ Ansi (MS Outlook) ☐ Unicode(Entourage 2008/Smart Phone)

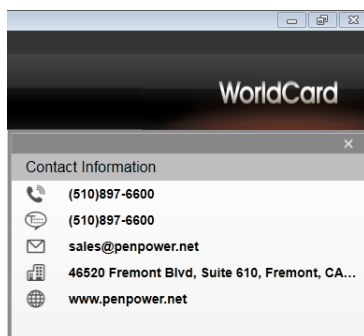
Tip: If you select [Run]/[Send Email]/[Attachment], the card images and text files of the selected contacts will be attached.

8.2 Skype

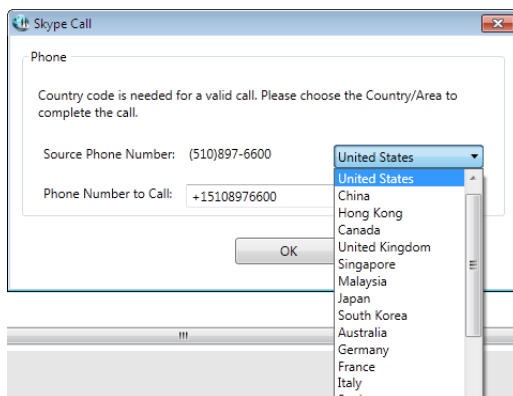
You can directly call your contacts through Skype. Note that you should install Skype on your device. To use the Skype-out function, you need to have Skype credits.

To call, you can right-click on the contact, one with a phone number, and click [Skype]. Or you can also click [Run]/[Skype] and click the Phone Contact Icon . You can also send message by clicking the Message Icon  if you have a Skype account.

You can also access the Phone Contact Icon and Message Icon in the Action Pane on the right side of the main screen.



If you wish to make an overseas call, you will sometimes need to modify phone number to add country code. You can simply select the country in the Skype window's drop-down menu.



8.3 Open Website

If there is any URL in the contact information, you can right-click on the contact and select [Open Website], or click  to open the website listed.

8.4 Display Map of Address/Route Planning

You can right-click on a contact and click [Display Map of address] or click  to view the address information for the selected contact on the Internet.

Moreover, WorldCard's Route Planning function allows you to plan routes between several contacts' address via Google Map and two contacts' address via Baidu Map. To do so, simply follow steps below:

1. Click several contacts and right-click, then click [Route Planning].
2. 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.

Tip: WorldCard will automatically save the address you type in [My Address]. Next time, you only need to open the drop down Main Menu and select the address.

3. You will see the route-planning window. Please make sure of the area, starting location and destination before clicking [OK]. You can use [Move Up] and [Move Down] buttons on the upper right screen to change the order of the addresses.

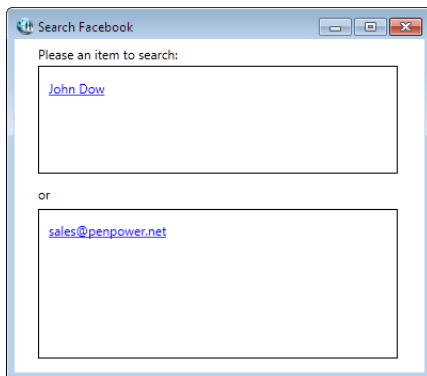
Tip: You can click [Previous] to reselect the address in your route planning.

4. WorldCard will open the default browser and show you the route planning result in either Google Map or Baidu Map.

Tip: To change the default browser, see Chapter 9.1

8.5 Search Contact on Social Networks

You can right-click on a contact and click [Social Network] to search for the select contact on Facebook, Twitter, LinkedIn or Weibo. The searches on these social platforms utilize all names and E-mail addresses as keywords.



8.6 Print Preview

You can print out the contact information in many formats depending on your requests, like envelopes, labels and cards.

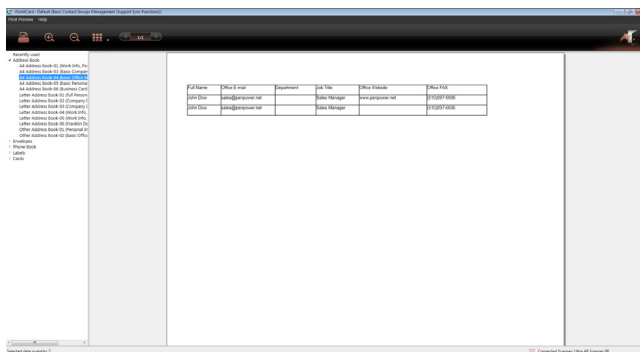
Click  /  to zoom in/out.

Click  to print selected cards, or click  to select all cards in preview area to indicate printing range.

Click  to print the contact information.

Click  to close the print preview page.

Click the arrow icon on  1/2  to switch the preview pages.



Chapter 9 Settings

WorldCard has many setting options that could make the application more applicable to your use. There are six categories of Settings: General, Scanning Options , Sync/Import/Export , Field Display, User Defined Fields and Auto Update Setting. For information regarding Sync/Import/Export settings, see Chapter 6.

To access the Settings dialogue window, click [Settings] in the drop-down main menu. Or you can also click  on the Quick Tool Bar.

9.1 General

Name display: Set name display sequence for Asian characters (Chinese, Japanese and Korean) and non-Asian characters.

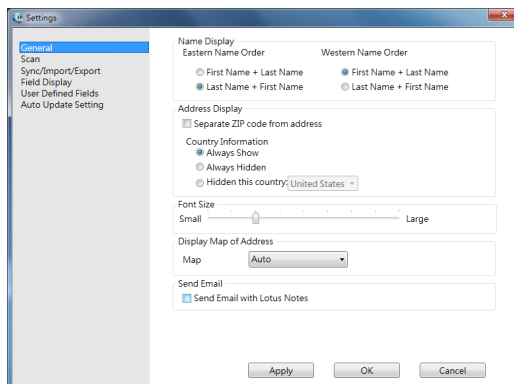
Address Display: Zip code and country information display.

Font Size: Adjust the arrow to set the desirable font size.

Display map of Address: Set the electronic map you want to use for viewing contacts' addresses. You can choose Auto, Baidu Map or Google Map.

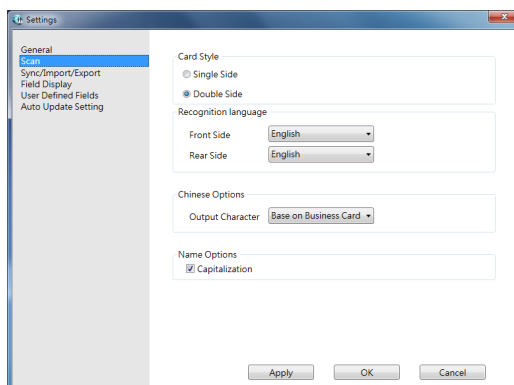
1. Auto: WorldCard determines which electronic map to use based on the country code of the address. For example, addresses in China are displayed via Baidu Map, whereas other countries' addresses are displayed via Google Map.
2. Baidu Map: All addresses are viewed via Baidu Map.
3. Google Map: All addresses are viewed via Google Map.

Send E-mail: Use the format of Lotus Notes to send E-mail.



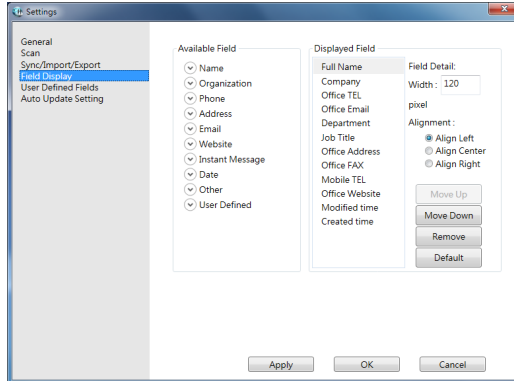
9.2 Scanning Options

You can change card style, recognition language, Chinese output characters or name capitalization.



9.3 Field Display

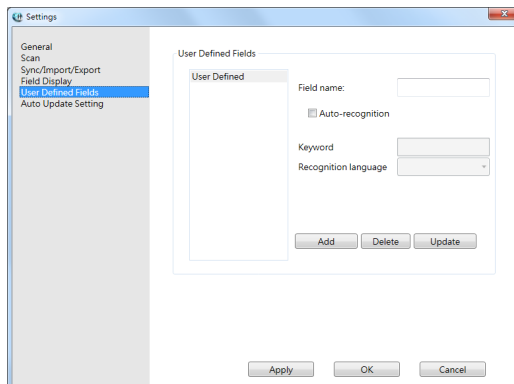
You can change what columns to display in the main screen by using the [Field Display] page of the Settings dialogue window. You can check or uncheck the display columns in the Available Field box. You can also modify column width and alignment to change the List View Mode main screen. Lastly, to arrange the column order in the Displayed Field Box, you can click [Move Up] and [Move Down].



9.4 User Defined Fields

In addition to the default fields displayed, you can also define other user-specified fields to be displayed in the List View Mode main screen. These user-defined fields will help you identify a relevant aspect of scanned cards through the use of keywords.

First, click [Add] to add a user-defined field. You can then name the new user-defined Field and click [Update]. Set a keyword for the field and identify the recognition language. You can check the option to [Recognize from business card automatically]. When the application recognizes more business cards, it will search those with this keyword. Data for this keyword will also be shown for each contact in the user-defined column automatically in List View Mode.



9.5 Auto Update Setting

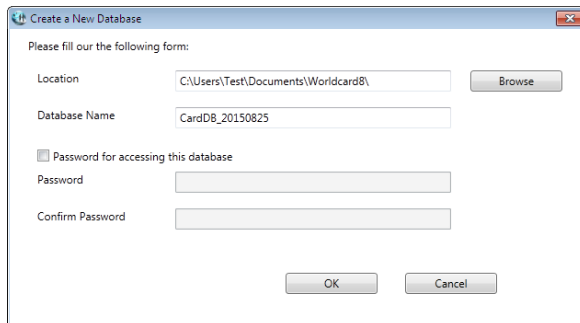
The Auto Update function is default been checked, when an update is released, you will be informed to install the update, if you don't want to receive the notification, you can uncheck it.

Chapter 10 Manage Database

You can create different databases for your contacts based on different organizational purposes.

10.1 Create New Database

1. Click [Database]/[Create a New Database].
2. Choose your new database as either [Basic Contact Groups Management (Support Sync Function)] or [Multi-layer Contact Groups Management].
3. Enter the stored path of the database and its name. You can also set a Password if you wish.
4. Click [OK] to create the database.



Tips:

1. *Set a password to protect the database from unauthorized access. Please check [Password for accessing this database] and enter your password.*
2. *You can find the database file via the saved path and name you gave.*
3. *For more information regarding the Multi-layer Contact Groups Management, see 4.6*

10.2 Open Existing Database

1. Click [Database]/[Open Existing Database].
2. Find your database file (*.wrp format) and click [Open].
3. If required, enter your password to gain access to the database.

***TTip:** There is a list of recently accessed databases in the drop-down main menu. Click [Database].*

10.3 Save Database as New File

You can save the database as a new file to distinguish from the original database.

1. Click [Database]/[Save Database as].
2. Select a folder where you wish to save the new database in.
3. Click [Save].

10.4 Rename Database

To rename a database, you simply have to open the database you wish to rename. Then follow the steps:

1. Click [Database]/[Rename Database].
2. Enter a new database name.
3. Click [OK].

10.5 Set Password to Database

To set a password to a database, you simply have to open the database to which you wish to set password. Then follow the steps:

1. Click [Database]/[Set Password].
2. Select [Cancel Password] or [Open Password] to change the password setting.
3. Click [OK] to change the password setting.

10.6 Create a Restore Point

To prevent unexpected loss when the application encounters errors, you are recommended to manually set restore points to backup your process. In the event that the application crashes, you can restore your database from the backup restore point.

2. Click [Database]/[Create a Restore Point].
3. Enter a restore point name.
4. Click [Backup]. You can find the backup file in the [BackupFile] folder.

10.7 Restore Database

To utilize the restore point, you can follow the steps:

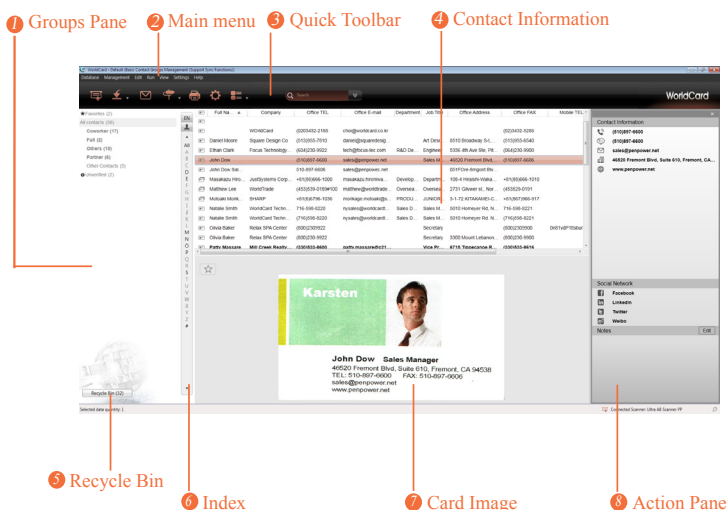
1. Click [Database]/[Restore]
2. Select the restore point. You can also click [Browse Files] to select the backup file
3. Click [Restore]

Tip: If you are currently working on or editing a database, restoring a backup file will clear your currently opened database. If you do not wish your current database to be overwritten by the back up file, please save the database as another file before you click [Restore].

Appendix A: User Interface Introduction

By using WorldCard, you can add new or delete existing contacts, categorize contacts into groups, and merge or separate groups. You can search contacts by name, phone number, company or e-mail address. You can connect with contacts on social platforms. Moreover, you can import/export/synchronize data with Microsoft Outlook, Gmail, ACT!, Lotus Notes and Salesforce and others.

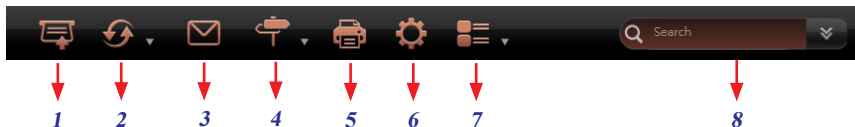
1. User Interface Overview



1	Groups Pane	Show contacts by assigned group. You can create, delete and rename groups or view contacts in each group.
2	Menu	Categorize all functions, including Edit, Settings and Help.
3	Quick Toolbar	Provide quick access to functions, such as Scan, Sync/Import/Export, Send e-mail, Open website, Display address on map, Settings, and View mode.
4	Contact Information	Display contact information. You can double-click to edit. See 3.1 for details.
5	Recycle Bin	Store deleted contacts. You can recover data or empty bin. See 3.2 for details.
6	Index	List contacts by name. You can click EN to change index to 注(Chinese ZhuYin), 拼(Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), 日(Japanese Phonetic), or 한(Korean Phonetic).

7	Card Image	Show the business card image if there is any.
8	Action Pane	Use quick functions like Email, Skype and social media to contact directly.

2. Quick Toolbar



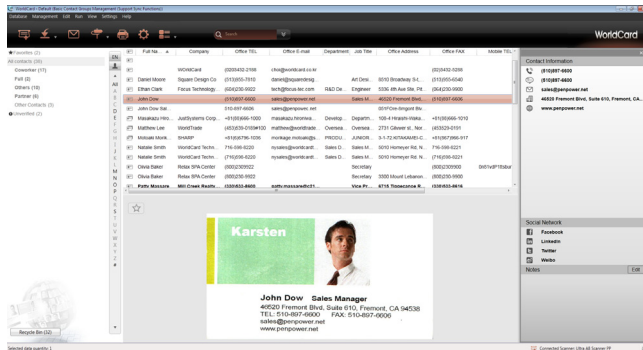
1	Scan	Scan new card into database. See 2.1.2 for details.
2	Sync, Import, Export	Synchronize data across contact-storage platforms, such as Microsoft Outlook, Gmail and Salesforce. See chapter 6 for details.
3	Send E-mail	Send e-mail through default e-mail software. You can designate e-mail recipient or send contact as attachment. See 8.1 for details.
4	Open Website/Display Map	Click to either open website in a browser, or locate address on Google map for route planning. See 8.3 and 8.4 for details.
5	Print Preview	Shows prview of a printed page in different formats of sheet-size, label and envelope.
6	Settings	Modify settings on scanner or account. See 9 for details.
7	View Mode	Switch display between List Mode and Card Image Mode.
8	Search	Type keywords into search box to find specific contact. See 5 for details.

3. View Mode

There are two view modes: List Mode  and Card Image Mode . On either view mode, you can right-click on a contact to access functions such as Export, Print preview, Edit, Delete, Marked as edited, Managing group, Merge conact, Divide contact, Send e-mail, Open website, Display map of address and Route planning, etc.

⦿ List Mode

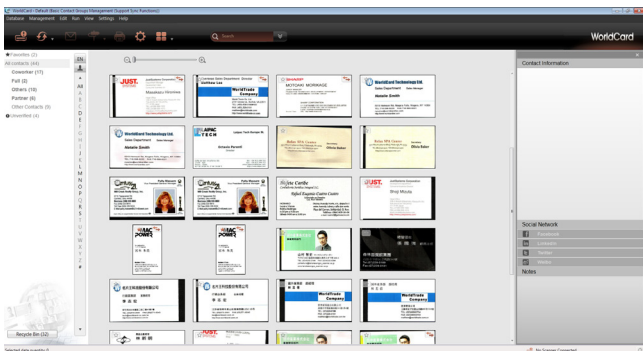
List mode  is the default view mode. Contacts are displayed in rows. Each column identifies a relevant aspect of information, such as company, telephone, job title and office address. You can double-click a row to edit information. A scanned image of business card should appear if one exists for that contact. Front icon shows whether the contact has a one-sided card  or double-sided card .



Tip: To modify the display of contact information, click [Settings]/[Field Display].

Image Mode

In Image Mode , contacts display with card images. Click the image to edit contact information. Click  button to view the front sides of all business cards. Click the  button to view the back side of all business cards. Adjust the image size by moving the sliding bar. Click  to turn another side of the card.



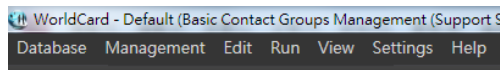
4. Index

There are several indexes you can use to organize contacts. Click  to change categorization to 注 (Chinese ZhuYin), 拼 (Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), 日 (Japanese Phonetic) or 韓(Korean Phonetic).

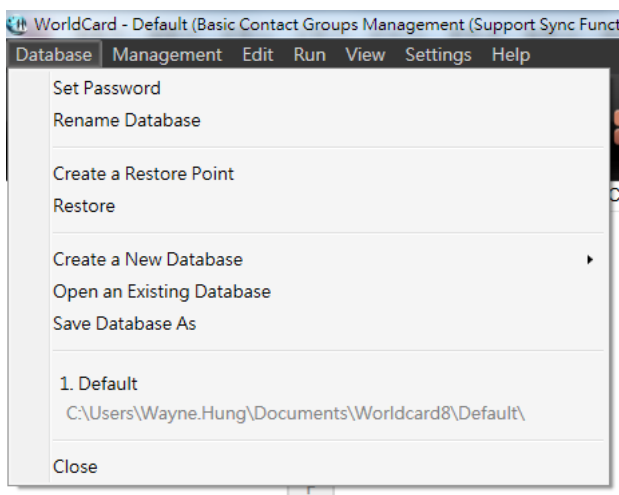
On index bar, you can choose to sort contacts by **Name**  or **Company** . When Name  is selected, contacts are sorted by contact's name. When Company  is selected, contacts are sorted by company name. Those that cannot be sorted into the index are placed in the  group.

5. Main Menu

There are seven main menus, appearing at the top of the screen: **[Database]**, **[Management]**, **[Edit]**, **[Run]**, **[View]**, **[Settings]**, and **[Help]**.

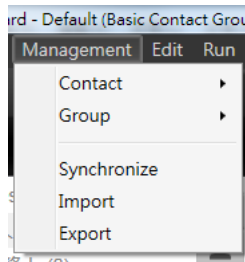


① Database



Set Password/Change Password	Set a password to protect your contacts from anyone accessing it. Everytime you open the database, you need to enter the password you set.
Rename Database	Change the database name.
Create a Restore Point	Create a restore point for saving the loss when the application encounters an error.
Restore	Restore the database from a backup file.
Create a New Database	Create a new database for contacts on different management purpose.
Open existing database	Open an existing database.
Save Database as	Save the database to another one on different management purpose.
Default	Show you the latest three database you accessed to let you quickly switch to another database.
Close	Close WorldCard .

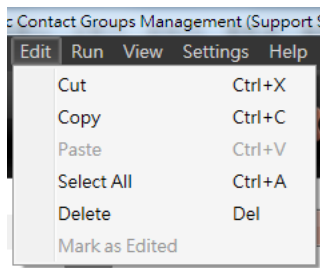
◉ Management



Contact	Add contacts [manually], add [from the same company] or add through [eSignature]. You can also mark contact as edited or delete contact. You can merge two single-sided card images into one entry, or separate contact with double-sided images into two entries. Click [Setting group] to manage groups.
Group	Add [new group], [delete group] and [rename group].
Synchronize	Synchronize data with Gmail Contacts, Microsoft Outlook, ACT!, Lotus Notes and Salesforce.

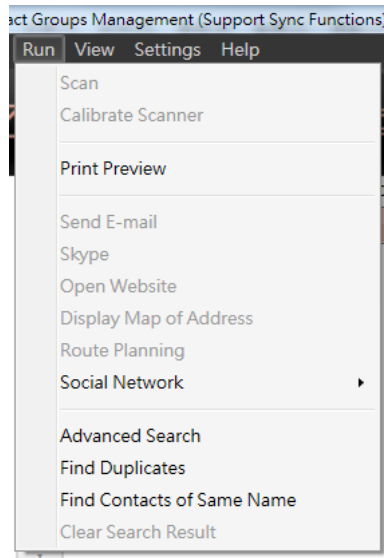
Import	Import data from [Microsoft Outlook], [ACT!], [Lotus Notes] and [Salesforce], [Salesforce Leads], [WorldCard Data Exchange File], [WorldCard v6 File], [Image Files], [DBank], [Dropbox], [CSV Files] or [vCard Files].
Export	Export data to [Microsoft Outlook], [ACT!], [Lotus Notes] and [Salesforce], [WorldCard Data Exchange File], [DBank Space], [Dropbox Space], [Image Files], [Microsoft Excel], [Text File], [CSV File] or [vCard Files].

⊙ Edit



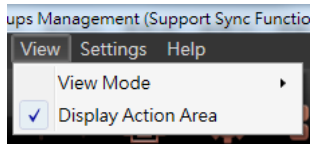
Cut	Cut selected contacts in order to paste into different groups.
Copy	Copy selected contacts.
Paste	Paste selected contacts into assigned group.
Select All	Select all contacts in current group.
Delete	Delete selected contacts.
Mark as Edited	Mark the selected contacts as edited.

○ Run



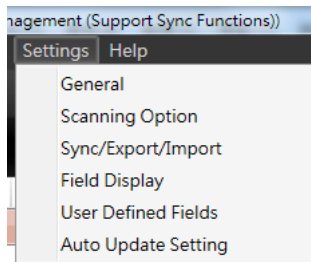
Scan	Scan a new card.
Calibrate Scanner	Calibrate the scanner to eliminate unclear image or inaccurate color by inserting a blank piece of paper.
Print Preview	Preview the printing in different document formats.
Send E-mail	Send e-mail, carbon copy, blind carbon copy to the selected contact, or attach the contact information as a file in e-mail.
Skype	Call contacts via Skype.
Open Website	Open the website on contact information.
Display Map of Address	Display location of the contact via Google Map or Baidu Map.
Route Planning	Planning the route via Google Map or Baidu Map.
Social Network	Search contacts on the social networking: Facebook, LinkedIn, Twitter or Weibo.
Advanced Search	Search contacts in specific columns, groups or timestamps.
Find Duplicated	Search and display the duplicated contacts.
Find Contacts of Same Name	Search and display the contacts with the same name.
Clear Search Result	Clear the search result in the view.

⦿ View Mode



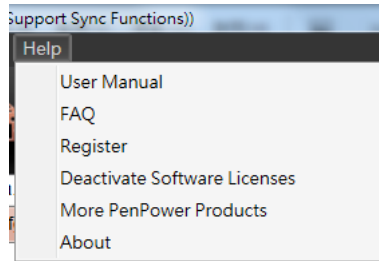
View Mode	Switch view mode between List mode and Card Image mode.
Display Action Pane	Display or hide the Action Pane from your screen.

⦿ Settings



General	Modify settings on display of name and address. You can also change the font size.
Scanning Option	Modify settings on scanning preference, such as language. You can also change traditional or simplified Chinese output and capitalization.
Sync, Import, Export	Modify settings on data synchronization, import and export.
Field Display	Modify settings on what information to display in the columns of List View Mode.
User Defined Fields	Add new fields to display in addition to the default display fields. You can also set certain keywords for user defined field. If such keywords appear, WorldCard will place captured phrase into designated column.
Auto Update Setting	Turn on/off the auto update function.

⊙ Help



User Manual	Download user manual.
FAQ	Open PenPower website's Frequently-Asked-Question page.
Register	Register to receive warranty service.
Deactivate Software Licence	Open the license deactivate web page.
More PenPower Products	Open PenPower's website.
About	Obtain more information about WorldCard.

Appendix B: Shift from WorldCard v6.6 to WorldCard v8

Through the WorldCard File (*.wcf) or WorldCard Data Exchange File (*.wxcf), you can move contacts from WorldCard v6.6 to WorldCard v8 and manage contacts in WorldCard v8. Export Contacts as a wxcf file from WorldCard v6.6

1. Click [File]/[Export] in WorldCard v6.6, select [WorldCard Data Exchange File (*.wxcf)] from the [Export Wizard] and click [Next].
2. Select which cards you wish to export.
3. Click [Browse] to select where you'd like to save the (*.wxcf) file and input the file name, then click [OK] to export.
4. After exporting is completed, click [Finish] to close Export Wizard.

About how to import the (*.wxcf) file into WorldCard v8, see Chapter 6 on Import WorldCard Data Exchange File (*.wxcf).

PenPower WorldCard

User Manual

Manufacturer: PenPower Technology Ltd.

Version: v8.5

Release: December, 2015