WorldCard
User Manual

Version: v8.3

Release: May, 2014

Contents

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.

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Chapter 1 Getting Started

1.1 Installation

1.1.1 System Requirements

● Windows 8 Desktop/7/Vista/XP SP3

1.1.2 Software Installation

Insert the WorldCard CD-ROM into the disk drive, it will automatically execute the [Setup.exe] program and start to install the 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 site to download the software.

1. Select the language on the installation wizard screen and click [Next].
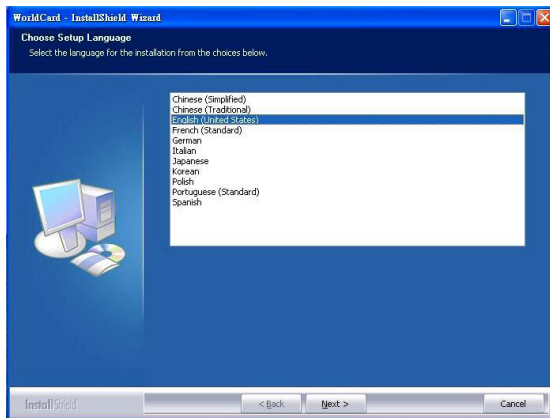
2. Click [Next] to continue.
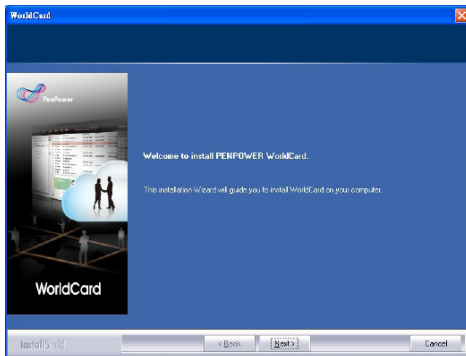
3. Please read the user license agreement carefully, click [I accept the terms of license aggrement], then click [Next].
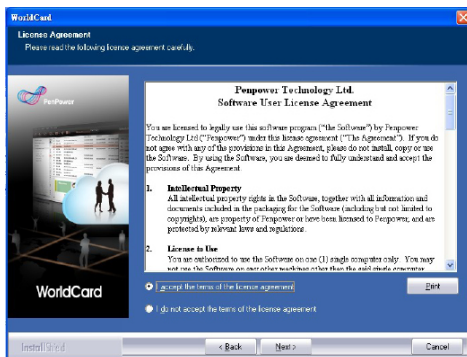
4. Select the default installation folder or click [Browse] to select other installation folder and click [Next].
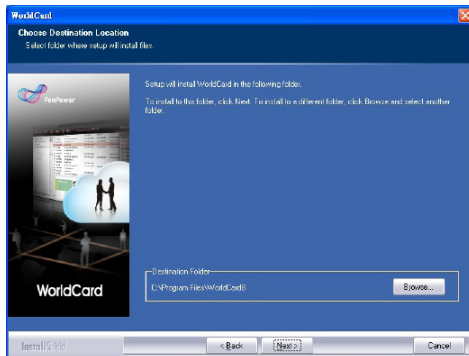
5. Click [Install] to begin the installation. If you'd like to change the installation folder, please click [Back] to modify it.
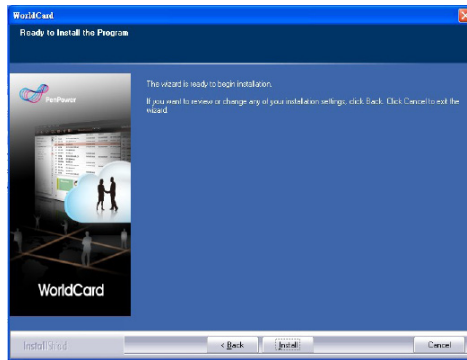
6. After the installation, we suggest you to select [Yes, I want to restart my computer now] and click [Finish] to close the wizard.
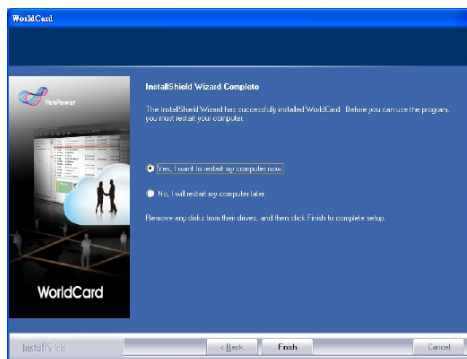
7. After the computer restarts, it will continue to install [.NET Framework], the WorldCard essential component.

1.2 Launch WorldCard

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.
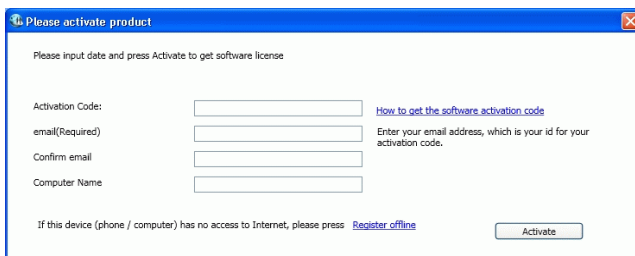
⊙ **How to get the software activation code**

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.
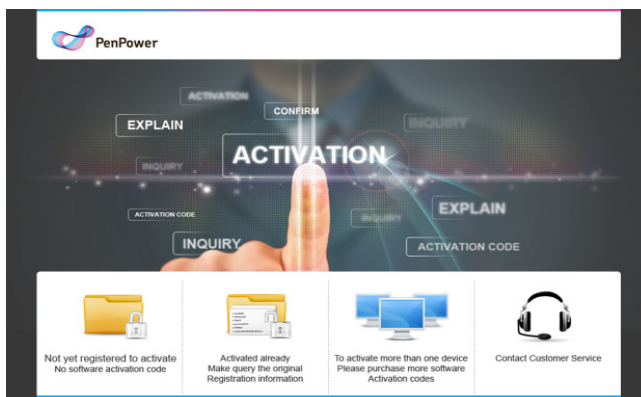
⊙   **Activate without Internet**

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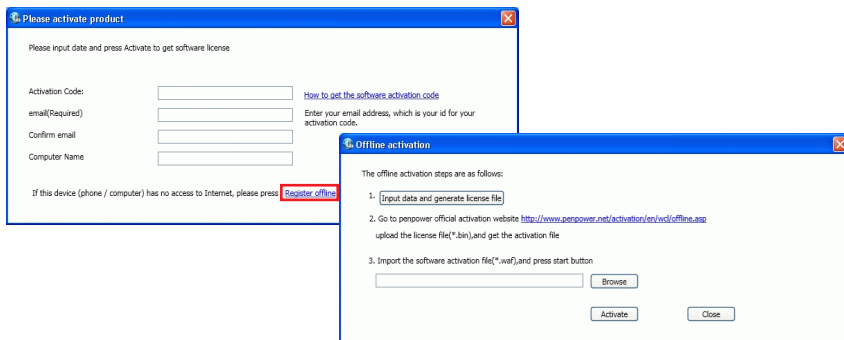
1.4 Online Help

WorldCard provides excellent online help info:

1. Click [**Help/User Manual**] to find the user manual.
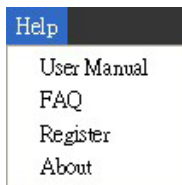
2. If you have some problem in using WorldCard, you can refer to **[Help/FAQ]** to eliminate your problems or click **[Help/About/customer mail box]** to email problem descriptions or your opinions to Penpwoer Customer Service. It will launch your email software and fill in relatend environment information in the email to help us to fix your problems.

3. Click **[Help/Register]** to register for receiving the warranty service.

Chapter 2 Add Contacts

2.1 Using Scanner

2.1.1 Scan the Card to Add Contacts

WorldCard works with WorldCard Pro scanner, it also supports WorldocScan Pro scanner. About how to operate WorldCard Pro scanner, please refer to the following explanations.

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 7.1.2, [Scanning Option].

2.1.2 Add Contacts via the 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 ![scan icon] on the regular 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 back side recognition language of the card. Start to scan the front side and then the back side of the card. Click [Finish] and you will see the contacts you just scanned showing in the contact list.
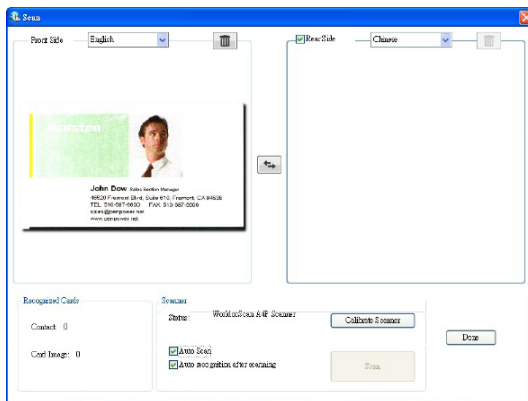
Tips:

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 exchange the front side and the back side of the card.*

5. *WorldocScan operations: Push the power button to turn on the scanner. When the scanner is ready, the status light will stop blinks. Insert your documents in face up, straight, aligned to the left into the Paper Feed Slot. When scanning is completed, the scanned image will be saved to JPG format in either a USB flash drive, memory card, or the scanner's internal memory. Click* 🔼, *it will tell you how many images in the scanner, you need to click [Recognize] button and decide if you'd like to delete images in the scanner, and then it will transmit images to WorldCard.*

2.2 Shift from WorldCard v6.6 to WorldCard v8

Through the WorldCard File (*.wcf) or WorldCard Data Exchange File (*.wcxf), you can move contacts from WorldCard v6.6 to WorldCard v8 and manage contacts in World-Card v8.

Export Contacts as a wcxf file from WorldCard v6.6

1. Execute [File]/[Export] in WorldCard v6.6, select [WorldCard Data Exchange File (*.wcxf)] from the [Export Wizard] and click [Next].

2. Select which cards you'd like to export.

3. Click [Browse] to select where you'd like to save the .wcxf file and input the file name, then click [OK] to export.

4. After exporting is completed, click [Finish] to close Export Wizard.

How to import the wcxf file into WorldCard v8, please refer to 5.1, Import the WorldCard Data Exchange File (*.wcxf).

Chapter 3 Edit Contacts

If you'd like to fill in more information or modify the recognition result, You can choose a contact on the main screen and right-click to open the edit window.
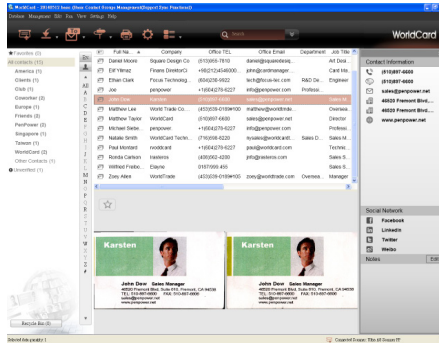
Tip: Click [Management]/[Contact] in the drop-down menu, there are two options to merge two contacts into one, or divide one contact into two contacts.

3.1 Editing Page

Click on the contact you'd like 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]. Click ![icon] after modification to exist the editing page, it will automatically save what you edited. If you'd like to undo what you edited, please click ![icon] or click [Edit]/[Undo]. Click [Contact]/[Add a Contact - Manually] to add a contact by yourself in the group.

To add a contact who is in the same company, please click ![icon] or [Contact]/[Add a Contact - from the same company], the application will add a new contact with the company name, address, phone number automatically filled in.
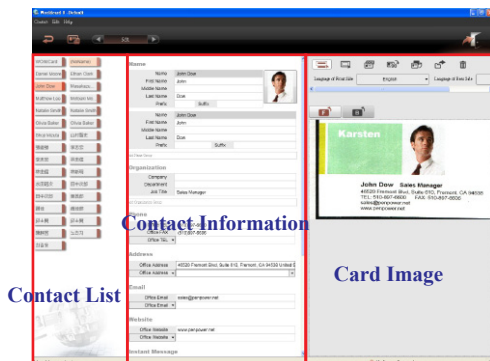
3.1.1 Contact List

The contact list shows you contacts in the same group to let you quickly switch between contacts. Click [More] to expand the contact list. When you click another contact, it will automatically save the modified contact. If you'd like to modify again, please click ⟲ before switch to another contact.

3.1.2 Edit the Contact

In the contact information area, you can modify any columns you want. If you'd like to modify another contact, just directly click the contact in the contact list. There are some more functions, please see below:

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

Name

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.

Using the contact information: If there's an icon showing next to the column, you can click the icon to call or send the email to the contact. You can also link to the contact's website.

3.1.3 Edit the Card Image

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

Click 🄵 and 🄱 to view the front and back side of the card.

Click ⤢ to expand the card image, click ⊕ to zoom in and click ⊖ to zoom out the card image.

Click ⟳₉₀ to rotate the card image to 90 degrees.

Click 📷 to add image or scan business card.

Click 💾 to save the card image.

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.
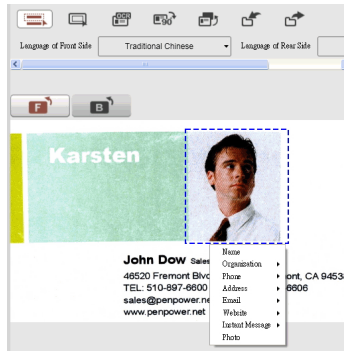
⊙ Reframing Command

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.

⊙ Recognizing Again

Select the appropriate language(s) for the front and/or back side of the card. Then, select the recognition language. You may then proceed with the recognize again command by clicking 🖳 or [Edit]/[Recognize]. If the card is double-sided, check [Both Sides] to recognize each side and click [OK]. Note that the card information will be cleared when you recognize the card again.
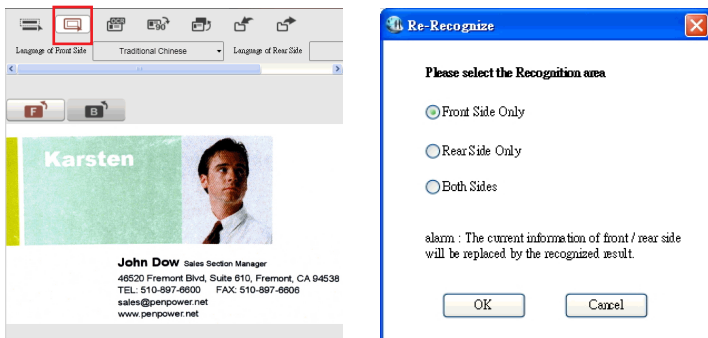
Tip: If the business card is double sided, you can click 🖳 button to switch the front side and back side.

3.2 Deleting/Restoring Contacts

Right click on a contact and then select **[Delete]** from the pop-up menu if you want to delete the selected contact. The contact will be moved to [Recycle Bin] in the left down corner of the screen. The deleted contacts will also be moved to [Recycle Bin] during the sync process.

Click **[Recycle Bin]** button to view the contacts which have been deleted. You can delete the contacts permanently by right-clicking on the contacts and select **[Delete]** or restore the contacts by select **[Undo]**.

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

Chapter 4 Manage Contacts

4.1 Add New Contacts

4.1.1 Add a Contact Manually

Click [**Management/Contact/Add a Concact - Manually]** from the menu on the main screen. This will open the **Editing** window. Then, type your new contacts information into the fields. How to edit the contact, please refer to 3.1, Editing Page.

4.1.2 Add a Contact from the Same Company

Select a contact in the list and execute **[Management/Contact/Add a Concact - from the same company]**, then it will open a new contact in the editing window. The application will automatically fill in the same company name, address, phone number, fax number and website link with the contact you selected. You need to fill in the contact's name, position, department, etc.

4.1.3 Add a Contact from an eSignature

WorldCard can recognize your eSignature in the email, click [Management]/ [Contact]/[Add a Contact - eSignature] to open the [E-Signature] dialogue window. Then copy the signature in the email and paste in the text area of the E-Signature dialogue window (shown as below). Click [Recognize] button and you can see the recognized contact information in the editing page.
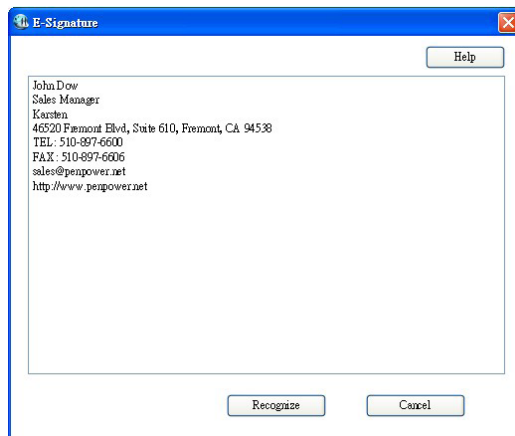
4.2 Group Management

You can manage contacts by categorizing them in different groups; you can also do the advanced search, print the contact information or export/import contacts.

4.2.1 Default Group

There are default groups such as [All contacts], [Unverified], [Favorites], [Unfiled], [Google Default Groups]. These default groups can't be deleted or renamed, please see the following explanations:

Unverified: It means the contact has not been edited.

Favorites: In the card image area, you can click ☆ to add the contact into the [Favorites] group. Click ★ again to remove the contact from the [Favorites] group.

Unfiled: A contact without the group information, it will be categorized in the [Unfiled] group. It happens during the sync processing or other conditions.

Google Default Groups: After synchronizing with Google, it will remain the Google default groups such as My Contacts, Family, Friends, and Coworkers, etc.

4.2.2 Add a New Group

1. Click [Management]/[Group]/[New Group].

2. Type the group name in the group management area on the left.

Note: The new group name can't be the same as the existed groups.

Tip: Select a contact and click [Management]/[Contact]/[Setting Group]. Click [New Group] button and type the new group name to add the group. You can also set a group for the contact.

4.2.3 Delete Groups

You have three ways to delete the group. Contacts in the deleted group will be moved to the [Unfiled] group. Select the group you'd like to delete and then choose one of the following ways to delete it:

1. Click [Management]/[Group]/[Delete Group].

2. In the group management area 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]/[Setting Group]. 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, if a contact in the deleted group also 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 [Unfiled] group.*

4.2.4 Change the Group Name

You have three ways to change the group name:

1. Click [Management]/[Group]/[Rename Group].

2. In the group management area on the left, right-click on the group you'd like to rename and select [Rename Group].

3. Select a contact and then click [Management]/[Contact]/[Setting Group]. 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 can't be the same as the existed groups.

4.2.5 Setting Groups for the Contact

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. Directly drag the contact to the group in the group management area on the left. This way can only set one group for the contact. If you'd like to set two groups or above for the contact, please refer to way 2 below.

2. Execute [Management]/[Contact]/[Setting Group] or right-click and select [Setting Group], check the groups you'd like to set for the contact on the Group Management dialogue window, then click [OK].
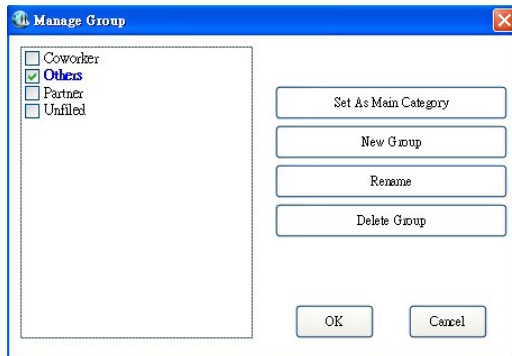
Tip: Some of softwares can't support that one contact belongs two groups. To compatible with other softwares, when there's a contact belonging two groups or above, you can set a main category for the contact. When the contact import to the other software, it will be categorized in the group that you set as the main category.

4.3 Search Contacts

4.3.1 Quick Search

You can type the keywords in the search field [Q Search] on the main screen of WorldCard to quickly search contacts. Click [Run]/[Clear Search Result] or the [X] icon of the search field to go back to the view before searching.

4.3.2 Advanced Search

Click [Advanced Search] button [⌄] or [Run]/[Advanced Search] and set the search conditions. To find the specific contacts, set the search columns and type the keywords in the Field area, you can also set the search conditions such as Groups or Timestamp. Right-click on the group and select [Advanced Search] to search the contacts in a specific group.

4.3.3 Find Duplicated Contacts

Select [Run]/[Find Duplicated Contacts] to filter duplicated contacts. If you'd like to delete the duplicated contacts, please click [Quick delete]. The application will remain a contact in the same color, others will be deleted. If you'd like to delete the duplicated contacts by yourself, right-click and select [Delete], [Management]/[Contact]/[Delete] or just press the [Delete] key on the keyboard. Click [Close] on the top of the list to go back to the view.

Chapter 5 Sync, Import, Export

5.1 Import

WorldCard supports many import sources, such as Microsoft Outlook, ACT!, Lotus Notes, Salesforce, WorldCard Data Exchange File(*.wcxf), 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.

Notes:

1. Before import, 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! 2011~2014(v16), Salesforce of the Enterprise / Unlimited version.

Execute [Management]/[Import] or on the regular bar and select one of the following import sources:

● Microsoft Outlook/Lotus Notes

Select Microsoft Outlook/Lotus Notes and click [Next]. Select the import source, then it will begin the import process. You can find the imported contacts in the groups, [All Contacts] or [Unfiled].

● ACT!/Salesforce

Select ACT!/Salesforce and click [Next]. Specify the database path, and log in to the account to import contacts. You can find the imported contacts in the groups, [All Contacts] or [Unfiled].

Note: Salesforce supports the third-party software accessing the data on the server only in Enterprise and Unlimited version.

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

WorldCard Data Exchange File helps you to manage contacts in different platforms of our products. It's the best choice for the product that doesn't support Google sync function.

Select WorldCard Data Exchange File/ WorldCard v6 and choose the import file. After import, 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.

Note: WorldCard v6 group is a hierarchical classification which is different from WorldCard v8. You can set the way to transform groups between them in [Settings]/[Import].

●   DBank Space/Dropbox Space

    Select DBank Space/Dropbox Space and click [Next]. Log in to the account and choose the wcxf file 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 [✕] next to the file to delete the wcxf file 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].

Tip: You can add contacts via the sync function, please refer to chapter 5.3.

●   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.

5.2 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! 2011~2014(v16), Salesforce of the Enterprise / Unlimited version.

Execute [Management]/[Export], [Ctrl]+[e] or 🔁 on the regular 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(*.wcxf)/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 wcxf file. You can find the exported wcxf 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).

5.3 Sync

WorldCard supports many softwares to sync contacts, such as Microsoft Outlook, ACT!, Lotus Notes, Salesforce, WorldCard Data Exchange File(*.wcxf), WorldCard v6 File(*.wcf), card image file to help you manage your contacts

Notes:

1. Before sync, 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! 2011~2014(v16), Salesforce of the Enterprise / Unlimited version.

Execute [Management]/[Sync] or click 🔄 on the regular bar and choose one of the following sync options:

● Google Contacts/ ACT! /Salesforce(Contacts)

Select one of the sync targets above and log in the account. The application will tell you how many contacts have been added, modified or deleted on each side. If you'd like to sync again, please click [Sync], you can also click [Exit] to close the dialogue window.

Tip: If you don't have a Google account, please click [Create an account], it will link to the register page of Google.

● Microsoft Outlook/Lotus Notes

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

5.4 WorldCard Data Exchange Compatibility List

WorldCard Synchronization

Item	Version
Gmail Contacts	all
Microsoft Outlook	2003~2013
ACT!	2011~2014(v16)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all

WorldCard Import

Item	Version
Microsoft Outlook	(2003 ~ 2013)
ACT!	2011~2014(v16)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all
WorldCard Data Exchange File wcxf	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 ~ 2013)
ACT!	2011~2014(v16)
Lotus Notes	v6.5~v9.0
Salesforce Contacts (Enterprise / Unlimited)	all
Salesforce Leads (Enterprise / Unlimited)	all
WorldCard Data Exchange File wcxf	all
DBank	all
Dropbox	all
Image Files jpg	all
Microsoft Excel	2003~2013
Text Files	all
CSV Files	all
vCard Files	3.0

Chapter 6 Use Contact Information

6.1 Send Email

To send email to the contacts, right-click and select [Send email] or click the Email button ▣ and select **[To]**, **[CC]**, **[BOC]**, or **[Attachment]**. WordCard will add the email addresses of the selected contacts into your default email software.

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

6.2 Skype

You need to install Skype software before using Skype function in WorldCard. Right-click on the contact who has a phone number and select [Skype] or click [Run]/[Skype] and click Phone Contact icon 📞 , you can call the contact via mobiles or landlines, you can also send your message 💬 if you have the Skype account. Click the phone number in the quick contact area on the right side of the main screen to contact people. To use the Skype out function, you need to get the Skype credits. When make a call to overseas, if the phone number without country code, you need to modify the information first. Just select the country in the drop-down menu of the Skype window.

6.3 Open Website and Display Map of Address

If there is any URL in the contact information, you can right-click on the contact and select **[Open Website]**, or click 🌐 button to open this website. Right-click on a contact and select **[Display Map of Address]** or click 🪧 button to view the address information for the selected contact on the Google Map.

6.4 Route Planning

WorldCard's [Route Planning] function allows you to query the route planning of several contacts' address via Google Map and two contacts' address via Baidu Map.

1. Select several contacts and right-click, then select [Route Planning]

2. Select the specific contacts' address or click [Select All] and then click [Next]. You can also edit [My address] and add it into your route planning.

Tip: WorldCard will automatically save the address you typed in [My Address]. Next time, you only need to open the drop-down 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] button on the top right screen to change the order of the address.

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 of Google Map or Baidu Map.

6.5 Search on Social Networks

Right-click on a contact and select **[Social Networking]** to search for the selected contact on **[Facebook]**, **[Twitter]**, **[LinkedIn] or [Weibo]**. It will provide all of names and email addresses as the keyword options.

6.6 Print Preview

Print out the contact information in many formats depending on your requests, like envelopes, labels and cards.
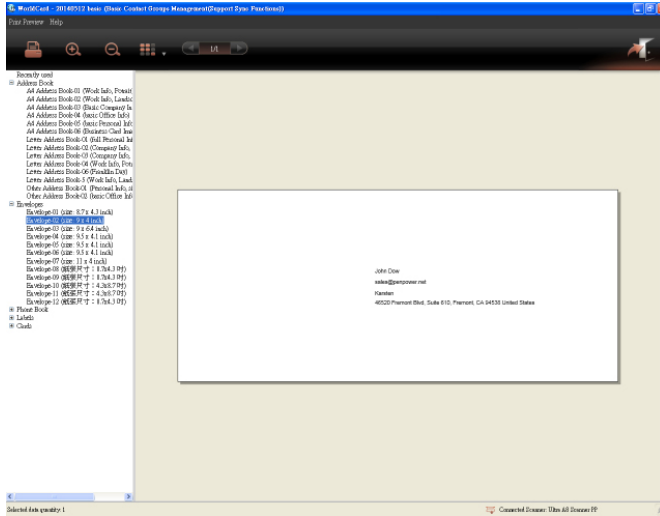
Click ⊕ and ⊖ to zoom in and zoom out.

Click ▦ [Selected cards] or ▦ [All cards in the preview area] to select the printing range.

Click ![print icon] to print the contact information.

Click ![close icon] to close the print preview page.

Click the arrow icon on ![arrow navigation 3/6] to switch the preview pages.

Chapter 7 Advanced Functions

7.1 Settings

WorldCard has many selectable Setting options to allow you to configure the operational functions of Name display, Field Display, Synchronization, Export, Import, Recognize, and User Defined Fields.

Select [Settings] in the drop-down menu, or click button on the regular toolbar.

7.1.1 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 font size.

Display map of Address: Set the electronic map you want to use for viewing contacts' address. The option includes Auto, Baidu Map and Google Map.

1. Auto: WorldCard determines which electronic map will be used due to the country code of the address. The address in China will be displayed via Baidu Map and other countries' address will be displayed via Google Map.

2. Baidu Map: All the address will be viewed with Baidu Map.

3. Google Map: All the address will be viewed with Google Map.

7.1.2 Scanning Option

Card Style, recognition language, Chinese output characters, name capitalization.

7.1.3 Sync, Export, Import

Refer to the following explanations to set sync, export and import related functions of Google Contacts, Outlook Contects, Lotus Notes, ACT!, Salesforce, DBank Space, Dropbox Space, wcxf, wcf, jpeg, Microsoft Excel, txt, CSV, vCard files, etc. Click [Apply] to save the modified settings. Click [OK] to save and close the setting window.

● Gmail Contacts

Setting ID: Click [Set up account] to enter your Google account and password. If you want to use another Google account to synchronize with WorldCard, reset your new account and password.

Sync Record: Once you synchronize, a relationship is established, the data on both sides will be the same every time you synchronize. For example, if you clear all the contacts in one side, next time synchronization will remove all the contacts in another side as well. Therefore, if you want to synchronize the contacts on both side but don't want to delete contacts, you can click [Delete Sync Record]. When you reset sync relationship, next time your synchronization will be a new initial synchronization to merge the data in WorldCard and Gmail Contacts. Please note that it may result in duplicate.

Tip: Check [Auto Sync], the application will automatically synchronize without interfering your works. You can see the auto sync status in the right down corner of the main screen.

● Outlook Contacts

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

Sync Record: Once you synchronize, a relationship is established, the data on both sides will be the same every time you synchronize. For example, if you clear all the contacts in one side, next time synchronization will remove all the contacts in another side as well. Therefore, if you want to synchronize the contacts on both side but don't want to delete contacts, you can click [Delete Sync Record]. When you reset sync relationship, next time your synchronization will be a new initial synchronization to merge the data in WorldCard and Gmail Contacts. Please note that it may result in duplicate.

Exports Contacts with Card Images: Check [Exports Contacts with Card Images], you can see the card image of the contact in Outlook Contacts.

● ACT!

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

Sync Record: Once you synchronize, a relationship is established, the data on both sides will be the same every time you synchronize. For example, if you clear all the contacts in one side, next time synchronization will remove all the contacts in another side as well. Therefore, if you want to synchronize the contacts on both side but don't want to delete contacts, you can click [Delete Sync Record]. When you reset sync relationship, next time your synchronization will be a new initial synchronization to merge the data in WorldCard and Gmail Contacts. Please note that it may result in duplicate.

Exports Contacts with Card Images: Check [Exports Contacts with Card Images], you can see the card image of the contact in ACT!.

● Lotus Notes

Setting ID: Click [Browse] to select DB Path.

Sync Record: Once you synchronize, a relationship is established, the data on both sides will be the same every time you synchronize. For example, if you clear all the contacts in one side, next time synchronization will remove all the contacts in another side as well. Therefore, if you want to synchronize the contacts on both side but don't want to delete contacts, you can click [Delete Sync Record]. When you reset sync relationship, next time your synchronization will be a new initial synchronization to merge the data in WorldCard and Gmail Contacts. Please note that it may result in duplicate.

● Salesforce

Setting ID: Enter your Salesforce account, password and Security token to log in.

Sync Record: Once you synchronize, a relationship is established, the data on both sides will be the same every time you synchronize. For example, if you clear all the contacts in one side, next time synchronization will remove all the contacts in another side as well. Therefore, if you want to synchronize the contacts on both side but don't want to delete contacts, you can click [Delete Sync Record]. When you reset sync relationship, next time your synchronization will be a new initial synchronization to merge the data in WorldCard and Gmail Contacts. Please note that it may result in duplicate.

● DBank Space

Filter Duplicated Contacts: Check [Filter Duplicated Contacts], when you import the duplicated contacts, the application will automatically keep the latest contacts and filter the same or older contacts.

Convert group information while importing: Your imported contacts may be a hierarchical classification, but WorldCard doesn't belong to this kind of classification, you need to choose a way to classify the groups in WorldCard. Select [Merge multi-layer as single] to combine all of the names in each layer, or select [Keep the First Layer Only] to take the first layer's name to be the group name in WorldCard.

● Dropbox Space

Filter Duplicated Contacts: Check [Filter Duplicated Contacts], when you import the duplicated contacts, the application will automatically keep the latest contacts and filter the same or older contacts.

Convert group information while importing: Your imported contacts may be a hierarchical classification, but WorldCard doesn't belong to this kind of classification, you need to choose a way to classify the groups in WorldCard. Select [Merge multi-layer as single] to combine all of the names in each layer, or select [Keep the First Layer Only] to take the first layer's name to be the group name in WorldCard.

● wcxf file

Filter Duplicated Contacts: Check [Filter Duplicated Contacts], when you import the duplicated contacts, the application will automatically keep the latest contacts and filter the same or older contacts.

Convert group information while importing: Your imported contacts may be a hierarchical classification, but WorldCard doesn't belong to this kind of classification, you need to choose a way to classify the groups in WorldCard. Select [Merge multi-layer as single] to combine all of the names in each layer, or select [Keep the First Layer Only] to take the first layer's name to be the group name in WorldCard.

● wcf file

Filter Duplicated Contacts: Check [Filter Duplicated Contacts], when you import the duplicated contacts, the application will automatically keep the latest contacts and filter the same or older contacts.

Convert group information while importing: Your imported contacts may be a hierarchical classification, but WorldCard doesn't belong to this kind of classification, you need to choose a way to classify the groups in WorldCard. Select [Merge multi-layer as single] to combine all of the names in each layer, or select [Keep the First Layer Only] to take the first layer's name to be the group name 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.

7.1.4 Field Display

Set the display column, its width and alignment in the list view. Check or uncheck the display column in the drop-down menu of Available Field. Click [Move Up] and [Move Down] to arrange the order of columns in Displayed Field.

7.1.5 User Defined Fields

In addition to the default fields displayed in the preceding picture. You may define other user-specified fields to be displayed in your WorldCard screens. Set the keywords for the field, it will help the application to recognize and categorize when scanning. To define a field, click [Add] to add a new field and enter the new field name and click [Update]. Then, you can select [Recognize from business card automatically] to set a keyword for this new user defined field. Next time WorldCard recognizes the contacts with this keyword, the data for this keyword will be added in this user defined field automatically.

7.2 Database

Create a database for your contacts on different management purpose.

7.2.1 Create a New Database

1. Execute [Database]/[Create a New Database].

2. Choose your new database as [Basic Contact Groups Management] or [Multi-layer Contact Groups Management].

3. Enter the stored path of the database, its name and password.

4. Click [OK] to create the database.
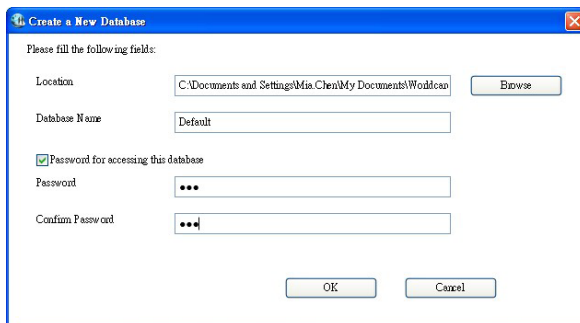
Tips:

1. Set a password for it to protect the database from others to access it. Please click [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 about [Multi-layer Contact Groups Management], please refer to 7.3 [Multi-layer Contact Groups Management].

7.2.2 Open Existing Database

1. Execute [Database]/[Open existing database].

2. Find your database file (*.wrp format) and click [Open].

3. If it needs a password to access it, please enter the password to open the database.

Tip: There are databases you accessed before list in the drop-down menu of Database.

7.2.3 Save Database as a New File

For more convenience to manage contacts, you can save the database as a new file in a different folder to distinguish from the original one.

1. Execute [Database]/[Save database as].

2. Select a folder.

3. Click [Save].

7.2.4 Rename Database

1. Open the database you'd like to rename and click [Database]/[Rename database].

2. Enter a new database name.

3. Click [OK] to change the database name.

7.2.5 Set Password or Change Password

1. Open the database you'd like to change its password setting, click [Database]/[Set password/Change password].

2. Select [Cancel password] or [Open password] to change the password setting.

3. Click [OK] to change the password setting.

7.2.6 Create a Restore Point

To prevent the loss when the application encounters an error during the operation, we suggest you to manually set the restore point to backup the database. If the application encounters an error, you can restore the database from the backup database file.

1. Execute [Database]/[Create a restore point].

2. Enter a restore point name.

3. Click [Backup] and then you can find the backup file in the [BackupFile] folder.

7.2.7 Restore Database

1. Execute [Database]/[Restore].

2. Select the restore point. You can also click [Browse Files] to check the backup file.

3. Click [Restore].

Note: If you're currently working with a database or editing the contact information, it will clear the current opened database and be overwritten by the backup file after you click [Restore]. If you'd like to keep the current contacts of the database, please save the database to another file first.

7.3 Multi-layer Contact Groups Management
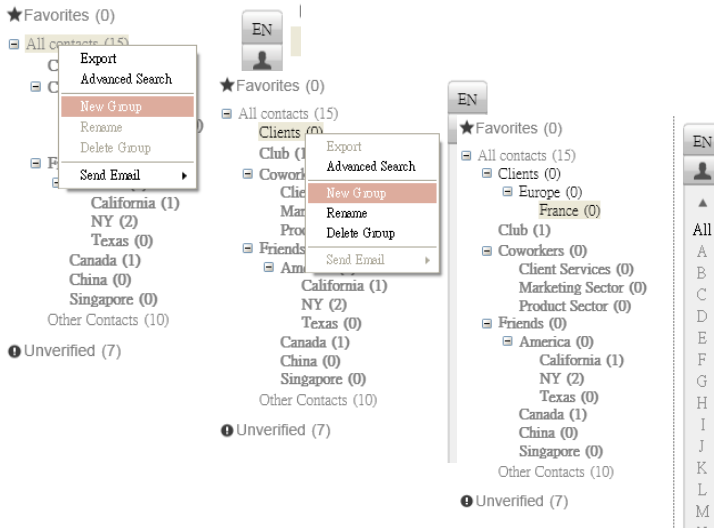
Besides basic contact groups management database, WorldCard also provides multi-layer contact groups management database. The default [Basic Contact Groups Management] database uses single level structure to manage contacts. As for [Multi-layer Contact Groups Management] database, it uses multi-layers structure to manage contacts. You can create a new multi-layer contact groups management database by clicking [Database]/ [Create a New Database]/[Multi-layer Contact Groups Management].

Note:

1. All sync functions are disabled in multi-layer contact groups management database.

2. [Multi-layer Contact Groups Management] database cannot be transferred to basic contact groups management database.

3. The group name in the same level cannot be the same.

4. Sub-group will be deleted with the parent group.

5. A contact can only be categorized into one group in [Multi-layer Contact Groups Management] database.

Chapter 8 Scan Manager

WordCard integrates with Microsoft Outlook and allows you to save verified contacts into the program directly after scanning the business cards. You can view the original scanned business card image in Microsoft Outlook as well.

8.1 Scanning Contacts

After installation, you'll see the **Scan Manager** icon at the lower right corner on your taskbar. Click it and select Microsoft Outlook. Then, WorldCard will open the scan wizard as below:
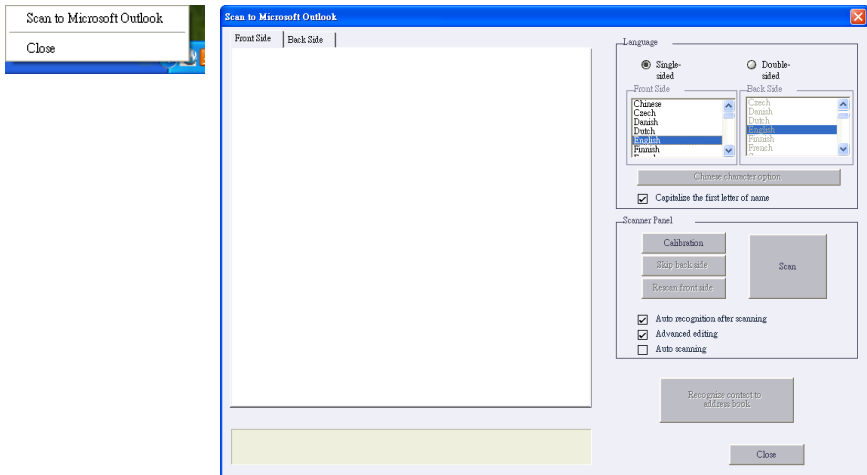
Note: You have to install the software in your computer before seeing it display in the storage element list.

8.2 Scan business cards

8.2.1 Scan and Edit business cards

1. Insert a business card and click the **Scan** button to scan it.

Tip: The WorldCard software will require you to calibrate the scanner when you use the scanner for the first time. Whenever there is color difference after scanning the card, you can calibrate the scanner by clicking **Calibration.**

2. Editing Recognition:

Language: Select the language of the business card.

Chinese character option: Select **Traditional Chinese** or **Simplified Chinese** for the output characters. If the characters include Hong Kong characters, select **Recognize Hong Kong character**.
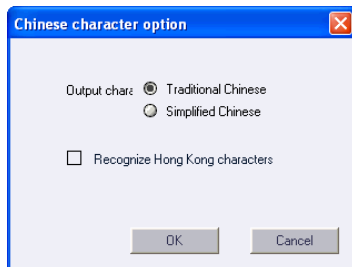
Capitalize the first letter of name: Check **Capitalize the first letter of name** to recognize the first letter of the contact's name to a capital letter. The other letters of the name will be recognized to lowercase letters.

Auto recognition after scanning: Select **Auto recognition after scanning** to recognize contacts after scanning. If this option is not selected, you need to click **Recognize content to address book** after scanning.

Advanced editing: Select **Advanced editing** to edit contact data before exporting them into address book.

It is recommended that you select **Advanced editing** to edit contact data before exporting contact data into address book. Regarding the editing functions, please refer to **Chapter 3**.
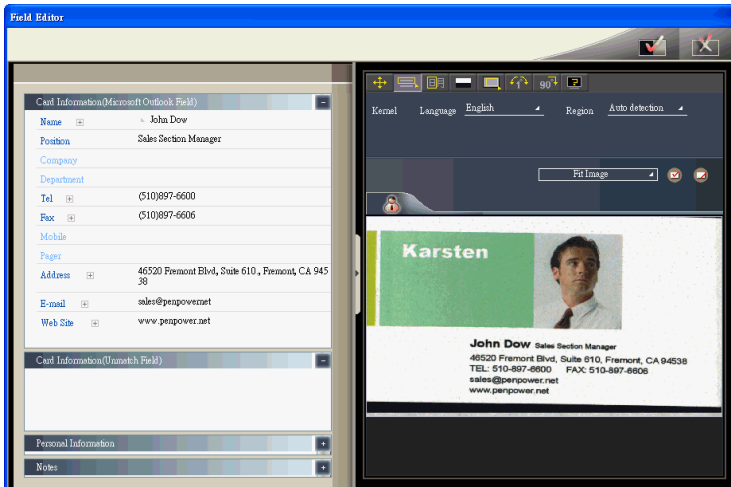
Once you finished editing, you can click to save name card's information in the fields into the address book. If you don't want to save the information, you can click to go back to the scan wizard window. Futhermore, if you want to reopen Field Editor window, please click [Recognize contact to address book] button.

Chapter 9

Sync and Share WorldCard Contacts with Mobile Devices

   WorldCard allows you to sync WorldCard contacts' information with mobile devices(WorldCard Mobile for iPhone and Android) through the sync function of Google Contacts. Moreover, you can use WorldCard Data Exchange File(*.wcxf) to share your contacts. Refer to 7.1.3, [Sync, Export , Import] for more information about WorldCard operations.

9.1 Operation for iPhone

     If you have iPhone, you can search for "WorldCard Mobile" app in iTunes store and download it. Click on the app and open WorldCard Mobile's Home page. Please follow the instruction below to successfully sync, import and export contacts' information to different devices.

9.1.1 Sync

1. Tap [Card Holder] on the home page to enter the list mode and click 🔍 ; Or you can tap ⚙ at the lower left of the home page and then sign in to your Gmail account.
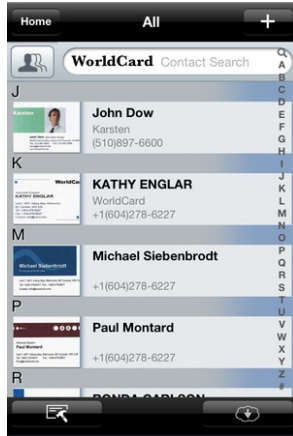
2. After setting your Gmail account, the system will automatically establish a Gmail Contacts group.

3. Please tap the sync buttom ![sync] at the bottom of the list mode to start syncing with Gmail Contacts.
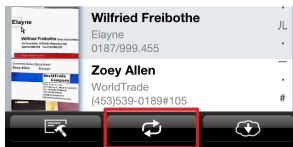
Note:

1. You can go to [Settings]/[Auto Sync] to choose the sync mode (Only Wi-Fi/Wi-Fi+Cell) you need. Next time you enter WorldCard Mobile, the system will automatically and irregularly sync Gmail Contacts' information.

2. You have to sign in to Gmail account before seeing *at the bottom of the list mode.*

9.1.2 Import

● Import wcxf. file from computer

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

1. Please connect your iPhone with the computer and open iTunes. Then, tap the iPhone device button.
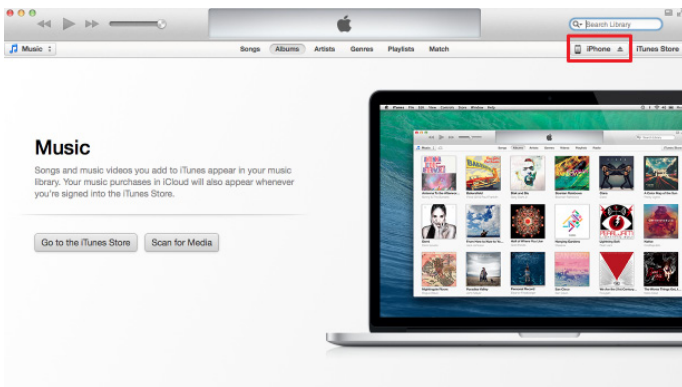
2. When you enter the summary page, please tap [Apps] to switch to app page.
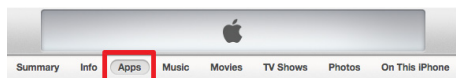
3. Go to File Sharing section to search for WorldCard app and click it. You will see all the files of WorldCard in the document storage area. Select and drag the exported wcxf. file into the document storage area.
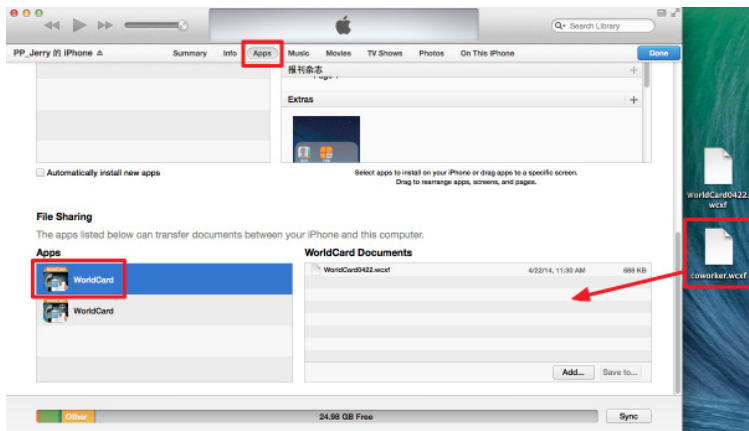
4. Open WorldCard Mobile in your phone and a whether import the file meesage will pop out. Please click [OK].
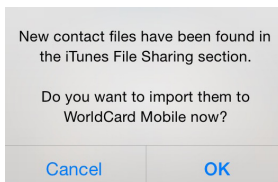
5. After confirming the file name, please click [Import].
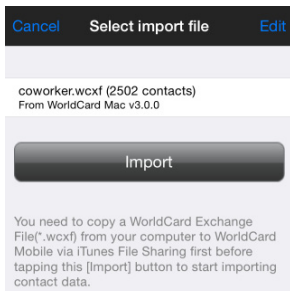
Tip: You can tap [Edit] to delete the unneccessary files.

6. When the import screen disappears, you can find the imported contacts' information in WorldCard Mobile's list mode.

● Import wcxf. file from Cloud services

1. Tap [Card Holder] on the home page.

2. Enter the list mode and click at the lower right of the screen.

3. Choose the Cloud services(iCloud/Dropbox/DBank) you want and sign into its account.

4. Select the files you need to import and tap [Import].

5. When you see a complete import message pops out, please click [OK]. Then, you can find the imported contacts' information in WorldCard Mobile's list mode.

9.1.3 Export

● Export wcxf. file to computer

1. Tap [Card Holder] on the home page to enter the list mode and click at the bottom of the screen.

2. Select the contact you want to export.

3. Click at the bottom of the screen and choose [WorldCard exchage file (.wcxf)].

4. Choose [Export to iTunes] in the export type option.

5. 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.

6. When you enter the summary page, please tap [Apps] to switch to app page.

7. Go to File Sharing section to search for WorldCard app and click it. You will see all the exported files of WorldCard in the document storage area. Select the file you want to export and click [Save to...]. Then, you can save the exported file to the computer and open it with WorldCard software.
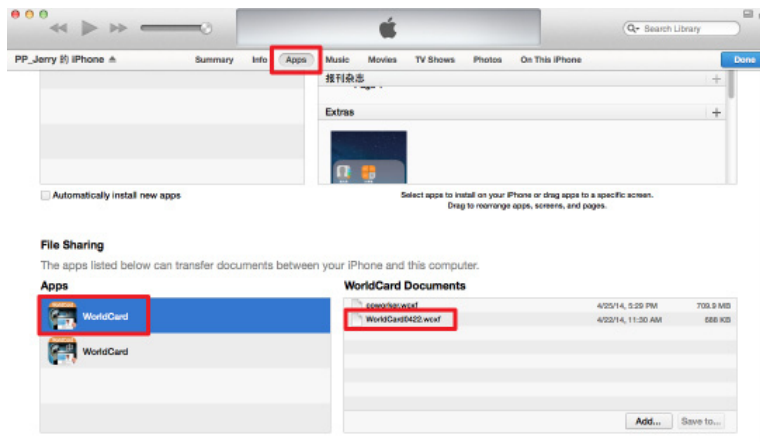
● Export wcxf. file to Cloud services

1. Tap [Card Holder] on the home page to enter the list mode and click [icon] at the bottom of the screen.

2. Select the contact you want to export and click [icon] at the bottom of the screen.

3. Choose the Cloud services(iCloud/Dropbox/Huawei DBank) you want and sign into its account.

4. When you see a complete export message pops out, please click [OK]. Then, you can find the exported contacts' information in the Cloud storage.

9.2 Android phone

If you have Android phone, you can search for "WorldCard Mobile" app in Google Play and download it. Click on the app and open WorldCard Mobile's Home page. Please follow the instruction below to successfully sync, import and export contacts' information to different devices.
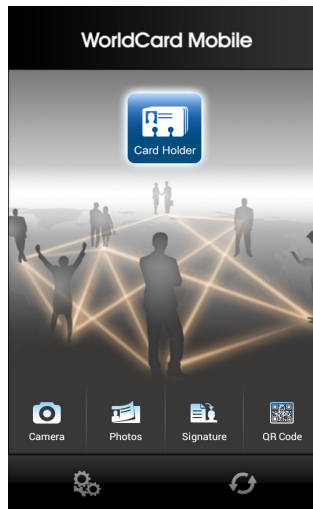

9.2.1 Sync

1. Tap the [icon] at the bottom of Home page to open Settings menu.

2. Go to Sync section and click "Please assign your account for sync".

3. Choose to set Gmail account by adding an existing one or creating a new one.

4. After setting your Gmail account, you can tap [icon] at the bottom of Home page to sync WorldCard Mobile's information with Gmail account's.

Tip: If you check [Auto Sync] in the Sync setting menu, next time you enter WorldCard Mobile, the system will sync Gmail Contacts' information automatically.
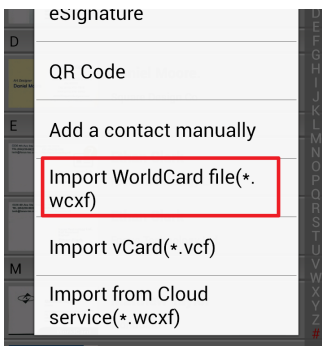
9.2.2 Import

● Import wcxf. file from computer

1. Please connect the computer with your phone and save the exported wcxf. file into the phone's memory card.

2. Please click [Card Holder] on the home page.

3. When you enter the list mode, please tap ➕ at top right of the screen.
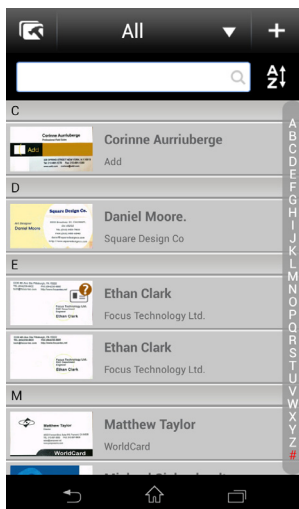
4. Choose [Import WorldCard file (*.wcxf)] to import the contacts' information.

5. Select the files you want to import and click [OK].

6. Choose whether to select target group for the contacts. Click [Yes], you can sort the imported contacts into the groups of WorldCard Mobile; click [No], then the contacts' original group information will be imported to WorldCard Mobile.
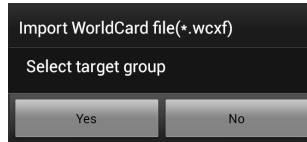
7. After the import process finishes, you can find the imported contacts in the list mode.

● Import wcxf. file from Cloud services

1. Tap [Card Holder] on the home page.

2. Enter the list mode and click ➕ at top right of the screen.

3. Choose [Import from Cloud service (*.wcxf)] to import the contacts' information..

4. Select Dropbox or DBank Cloud service and sign into its account.

5. Select the files you need to import and tap [OK].

6. Choose whether to select target group for the contacts.

7. After the import process finishes, you can find the imported contacts in the list mode.
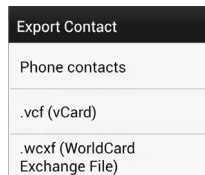
9.2.3 Export

● Export wcxf. file to computer

1. Tap [Card Holder] on the home page.

2. Enter into the list mode and click 🔲 at top left of the screen.

3. Select the contacts you want to export and click 📤 at the bottom of the screen.
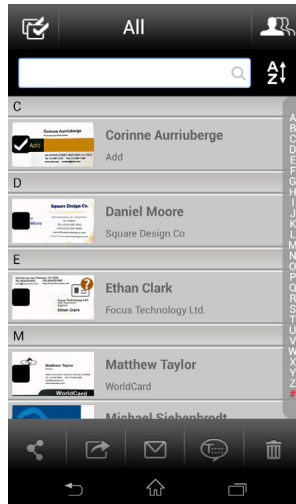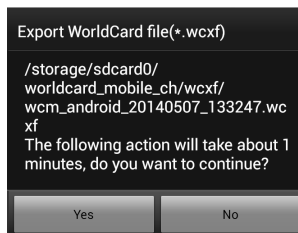
Tip: You can click *at top left of the screen to select all contacts.*

4. Choose [.wcxf (WorldCard Exchage file)].

5. Click [Yes] in the export confirmation screen. When you see the export success message, this means the wcxf. file had been exported to WorldCard Mobile's folder.

6. Connect the computer with your phone. Open the folder of WorldCard Mobile in the phone's memory card and you can find the exported wcxf. file.


● Export wcxf. file to Cloud services

1. Tap ⬆ at the bottom of the home page.

2. Select Dropbox or DBank Cloud service and sign into its account.

3. Select the contacts you want to export and tap [Done]. If you want to cancel the export process, please tap [Cancel].

4. After the export process finishes, you can find the exported contacts in the Cloud storage.

Appendix User Interface Introduction

WorldCard allows you to categorize contacts, send email by contact, add new contacts to a group, delete contacts, merge and separate contacts, search contacts by various data fields, import/ export/ synchronize contact information, and etc. Moreover, you can synchronize the data in WorldCard with Microsoft Outlook Contacts, Gmail Contacts, ACT!, Lotus Notes, Salesforce.

1. User Interface Overview
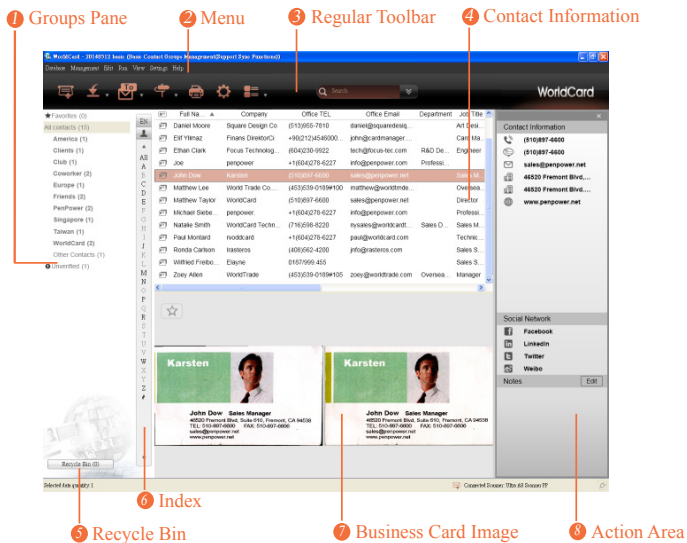
1	**Groups Pane**	The groups can be freely created, deleted, renamed, view contacts in a specific group, and so on.
2	**Menu**	Find the functions you'd like to execute in the menu
3	**Regular Toolbar**	Provides you an easy way to find the functions, such as Sync, Send Email, Open website, find address on maps, Import/ Export, Options, and View mode.
4	**Contact Information**	View contact information or click any contact to edit. Refer to 3.1.
5	**Recycle Bin**	Collect deleted data and you can return them from here. Refer to 3.2.
6	**Index**	Click EN button to set the index as 注(Chinese ZhuYin), 拼(Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), 日(Japanese Phonetic), or 한(Korean Phonetic).
7	**Business Card Image**	Show the business card image if there is any.

8	Action Area	Use quick functions like Email, Skype and social media to contact directly.

2. Regular Toolbar
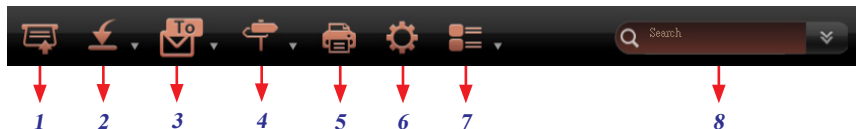
1	Scan Wizard	Scan the cards, refer to 2.1.2.
2	Sync/Import/ Export	Exchange contacts with many softwares, refer to chapter 5.
3	Send Email	Send Emails to contacts, WorldCard will open the default Email software and fill in the address or attach the contact information as a file for you, refer to 6.1.
4	Other functions	Using contact information, such as view the location of the contact's address and route planning, refer to 6.3 and 6.4.
5	Print Preview	Preview the contacts printing in different document formats.
6	Settings	Scanner or account settings, refer to 7.1.
7	View mode	View contact information in the list mode or card image mode.
8	Search contacts	Type keywords in the search field to find the contact, refer to 4.3.

3. View Mode

There are two view modes: List Mode 🔲 and Card Image Mode 🔲 . Right-click on a contact to select functions like Export, Print Preview, Edit, Delete, Marked as Edited, Setting group, Merge conact, Divide contact, Send email, Open Website, Display map of address and Route planning, etc.

⦿ List Mode

List mode 🔲 is the default view mode, the contact information displays in different columns; click the contact to edit the contact information. If the contact has a card image, it shows below the contact list. Before the Name field, there's an icon to show you if the contact has one-sided 🔲 or double-sided card 🔲 .
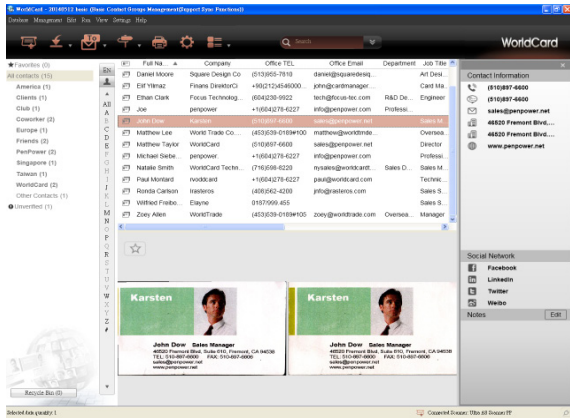
Tip: Modify the displayed fields, click [Settings]/[Field Display].

⊙ 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.
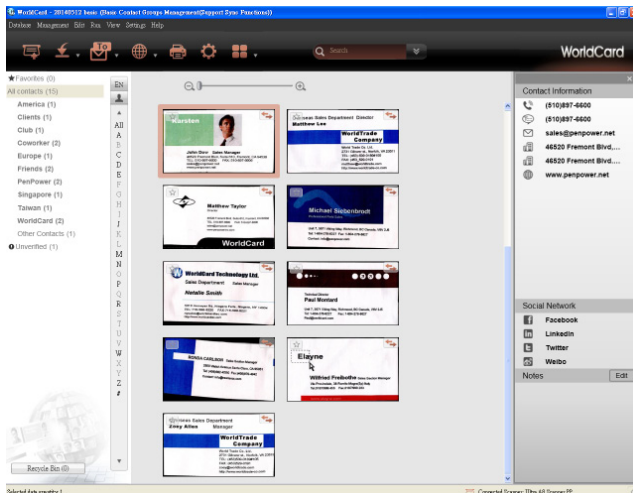
4. Alphabet Index

There are different types of indexes can be used to manage your contacts. Click EN button to set the index as 注 (Chinese ZhuYin), 拼 (Chinese Hanpin), 12..(Chinese Stroke), EN(English Alphabet), 日 (Japanese Phonetic), or 한(Korean Phonetic).

You can set the index sorted by **Name** 👤 or **Company** 🏢. When Name 👤 is selected, the contacts will be sorted by display name. When Company 🏢 is selected, the contacts will be sorted by company name. If the display name or company name of the contact cannot be sorted by the index, the contact will be put in the # group.

5. Menu

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

⊙ 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 via [Manually], [from the same company], [eSignature] or marked contacts as edited. You can also delete contacts or merge two contacts with single-sided card images into one entry, including merging contact information and images. Separate a contact with a double-sided card into two separate entries. Click [Setting group] to set the group for the contact.
Group	Add groups, delete groups and rename groups.
Syncronize	WorldCard can syncronize with Microsoft Outlook Contacts, Google Contacts, ACT!, Lotus Notes and Salesforce. Select the contacts in WorldCard to syncronize with the correspondent software.
Import	Import [Microsoft Outlook Contacts], [ACT!], [Lotus Notes] and [Salesforce Contacts], [Salesforce Leads], [WorldCard Data Exchange File], [WorldCard v6 File], [Image Files], [DBank], [Dropbox], [CSV Files] or [vCard Files] contact data into WorldCard to manage contacts.
Export	Export [Microsoft Outlook Contacts], [ACT!], [Lotus Notes] and [Salesforce Contacts], [Salesforce Leads], [WorldCard Data Exchange File], [Image Files], [Microsoft Excel], [Text File], [DBank], [Dropbox], [CSV File] or [vCard Files] from WorldCard contacts.

⊙ Edit

Cut	Cut the selected contacts and then you can paste them in different contact categories.
Copy	Copy the contact information.
Paste	Paste the cut or copied contacts in the selected category.
Select All	Select all contacts in the current category.

⊙ Run

Scan	Execute scan wizard to scan the card image into WorldCard.
Calibrate scanner	Calibrate the scanner to eliminate unclear image or inaccurate color
Print Preview	Preview the printing contact in different document formats.
Send email	Send email, carbon copy, blind carbon copy to the selected contact, or attach the contact information as a file in Email.
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 Contacts	Search and display the duplicated contacts.
Clear Search Result	Clear the search result in the view.

⊙ View Mode
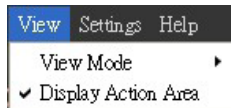
View Mode	Select to view your contacts with List mode or Card Image mode.
Display Action Area	If you'd like to hide the action area, just click it again.

⊙ Settings

General	Set the sequence of name display.
Scanning Option	Card Style, recognition language, Chinese output characters, name capitalization.
Sync, Import, Export	Set related information for Synchronization, Import, and Export.
Field Display	Select the displayed fields to show in the list mode.
User Defined Fields	In addition to the default display fields in WorldCard Link, you can add new fields by yourself. You can also set a key word for the user defined field.

⊙ Help

User Manual	Refer to the user manual.
FAQ	Refer to the FAQ or connect to Penpower website.
Register	To register for receiving the warranty service.
About	See more information about WorldCard.

Penpower WorldCard
User Manual

Manufacturer: Penpower Technology Ltd.

Version: v8.3
Release: May, 2014