WorldCard Cloud

Web Version User Manual

Version: v2.0

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Content

There may be newer versions of the software that was released during or after this product's manufacturing date. If the content in the User Manual differs from the on-screen interface, please follow the instructions on the on-screen interface instead of the User Manual.

History

v2.0.0

- First version of WorldCard Cloud.

Chapter 1 Login to WorldCard Cloud Service

1.1 Log In

After you have applied for an account of WorldCard Cloud Service, you will be able to quickly log in to view your information through the web page.

Please use the web browser to open: **https://www.worldcardcloud.com** , and log in from the upper right corner of the screen.

Recommended Browsers: Edge / Chrome/ Firefox / Safari / QQ / Sogou.

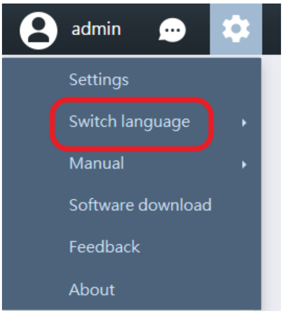
1.2 General Settings

1.2.1 Change Password / Display Name

Click on top right corner, and then click [Profile]. Click on each field to make changes. If you forgot the password, click [Forgot Password] on the main screen to reset.

1.2.2 Switch Interface Language

Click on top right corner, and then click [Switch Language] to choose interface language.



1.2.3 Back to Homepage / Sign Out

Click the word [WorldCard Cloud] on top left corner to go back to Homepage; to sign out, click on top right corner, and then click [Sign Out].

Chapter 2 WorldCard Cloud Settings

2.1 Admin Settings

Since you are the administrator, it is recommended that you check the WorldCard Cloud related settings after you log in for the first time.

WorldCard Cloud settings can only be changed by administrator logging in on the web page, and then click on the upper-right corner of screen, and choose [Settings].

In the settings, you can manage the user account, adjust the permission of data sharing, and make the custom field according to the team's needs. If you use the CRM system, please do the linkage setting here.

2.1.1 Manage Accounts

Here you can click the icons on the toolbar to add or edit user account.

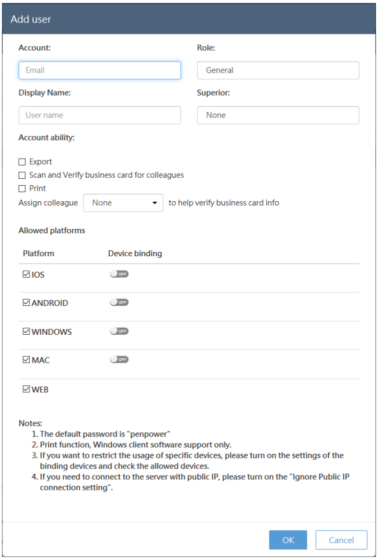
When establishing a user, it is necessary to set whether the user belongs to a general user or a read-only user, and who the designated user is, so that different users have different usage rights.

If you want to allow users to export the data for saving, or to allow a user to scan the business card for others, please check the relevant options, please click the [OK] button to complete the account. Add or edit.

Note: Read-only users can add / edit their own contact data, but for [Shared Contacts] data, they can only view it, they cannot be download and edit it.

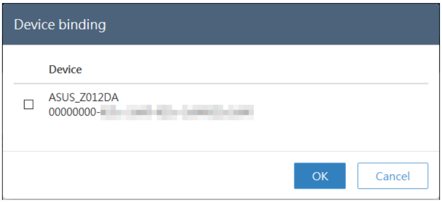
If any user forgot the password, please click to reset the password back to "pen power" and inform the user to log in as soon as possible to reset the password, or you can tell the user to click [Forgot Password] button on the login page by themselves to reset password.

Reminder: When creating accounts, please make sure you enter the correct Email address, to prevent users can not be logged in properly.



If you want to restrict a user to only use Android devices or Windows computers, or even use web pages to connect, etc., please make settings in the [Allowed Platforms] project.

If you want to bind a device in advanced, for example, if the user requests that he wants to make sure his account will not be logged in by other device, you can ask the user to use the device that to be bound to connect, then you click to edit the user's account, and then click next to the platform, then the device information will list, then you can tick to bind the device.



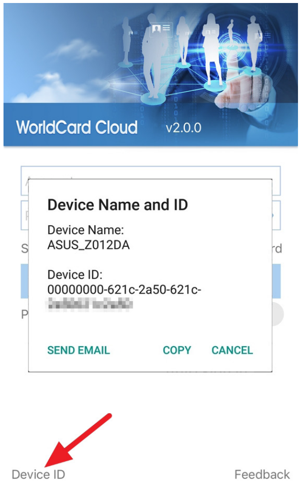
Tip: Each platform can be bound to up to two devices.

If the user has used multiple devices to connect, in order to ensure the correct information, as shown below , the user can tap on the [Device ID] of the software login screen on the device that to be bound, and provide the correct device information to the administrator via email.

Reminder:

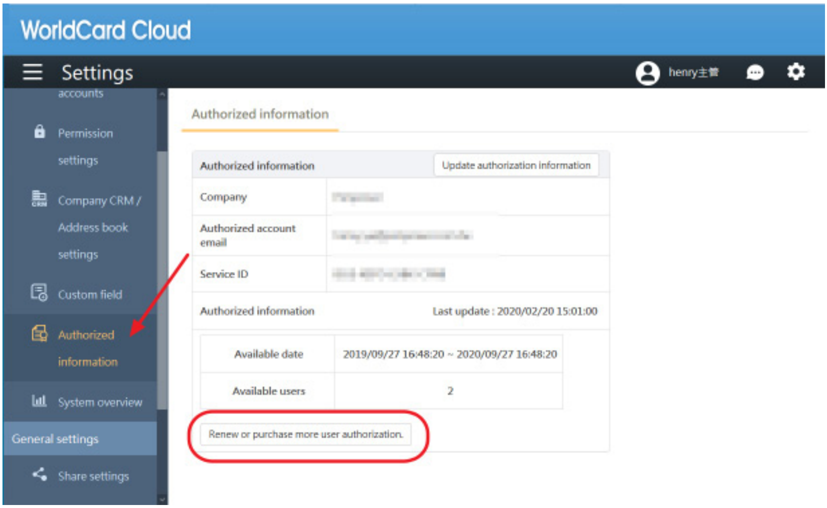
1. ***It is recommended to bind the device before going on a business trip. If the user is already outside of the company without binding, or his/her device is lost when he/she is outside, and need to use the new smart phone to connect. At this time, the user can use the new device to connect, although the connection will fail, the server will still have a connection record, at this point, the user can contact the administrator to bind the new device to log in again.***

2. ***If the user leaves the company, please remember to unbind the device that has been bound to.***

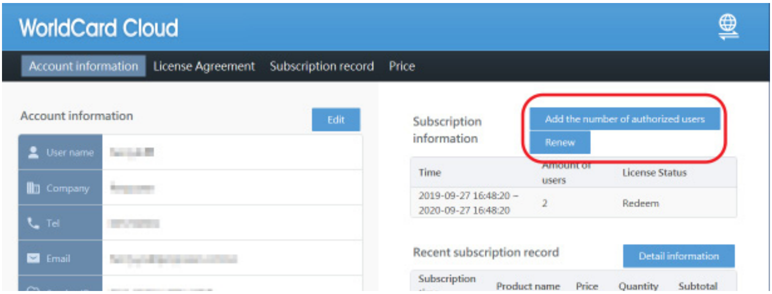


2.1.2 Subscribe/Add User Account

In you want to continue the subscription, or you want to add more users, please use the administrator account to log in to the WorldCard Cloud service on the webpage, and refer to diagrams on the next page to operate.



Click the [Renew or purchase more user authorization] button in the [Authorized Information] page in the settings, then choose whether you want to add more users or to renew the current authorization. Then follow the instructions on the screen and fill in the number of users or the renewal time to make the payment.



After the renewal is completed, the information on the [Authorized Information] page will be updated.

2.1.3 Delete/Deactivate/Suspend User Account

If the user account is created by mistake, if this account has never logged in, you can easily click to delete it. But if this account has already logged in before, it cannot be deleted, you can only click to set this user account as inactive user. If the owner of this user account has no longer in the company, you can also set the account as inactive.

Once the user account is set as inactive, it cannot be activated again, and the contact data belongs to this user account cannot be deleted by this user account as well; If you need to transfer those contact data to new employee, please click [Inactive User] tab above, and click icon on the toolbar to inherit those contact data to the new user account (employee) who is going to take over this job, and the owner of those contact data will be changed immediately to that new employee; Or you can click to change the data owner one by one, and the new user will be able to continue use the data.

Tips: All the shared contact data that shared by of the disabled user account can be continued use and be continuously used and updated by the users who get shared.

If the user account will be temporarily not use, click to suspend the user account. After suspending, please note that user cannot log in (only administrator account can still be able to log in on webpage), and other users cannot share the contact data to the suspended user account.

To enable a suspended user account, click the [Pause] tab above, select the user account you want to enable, and click to cancel the suspension.

In addition, if necessary, you can enable the [Automatic Suspend Account] options at the bottom of the page. When an account meets the conditions you set (new user is not logged in within how many days, failed to log in for how many times), the account will be automatically suspended.

2.1.4 Sharing Rules

You already set up this during the initialization, and you can change it again here.

Standard Sharing

- Administrators can access company-wide data.
- Superior can view Subordinates' data .
- Based on sharing settings, users can view the data that shared by other users.

Company-wide Sharing

- All contacts have been shared, each account can view the company-wide contacts.

2.1.5 CRM/Address Book Settings

In here, you can set whether to associate the user's contact information with the company CRM or company address book.

If you want WorldCard Cloud users to connect to your company CRM system or company address book, please select it click [Settings] to enable. If your company's Salesforce URL is customized, please select [Custom Domain] when setting it, and fill in the specific domain, so that when the users need to access to Salesforce, it will automatically connect to your company's dedicated Salesforce.

To allow accessing to the company address book (currently supports Exchange and Office 365), click [Settings] after selecting the address book system (such as Exchange), enter the IP or URL of the Exchange server, and then click [Setting] to enable this feature.

If the administrator enables the feature to connect CRM system or company address book, click CRM/Address Book Settings under General Settings, and input log in information of your CRM system or company address book. You can manually export contacts to CRM systems or company address book, or have WorldCard Cloud synced with CRM or company address book. WorldCard Cloud will sync with CRM system or company address book every 10 minutes if the sync function is on, and synchronize contacts with changes to the company CRM system or company address book for updates.

2.1.6 Custom Field

WorldCard Cloud provides field customization feature, you can add many customized fields. Please click + to add new field. and then enter the field title and field property to complete.

There are various properties for custom fields:

1. Text: Can fill in texts and symbols.
2. URL: Can enter URL information.
3. Email: Can only fill in the data with Email format.
4. Picklist: Customize menu content to allow users to select.
5. Number: You can only enter integer numbers.
6. Floating-point Number: You can enter a value that contains a decimal point.
7. Date: Add date.
8. Date Time: Add date and time.

Reminder: In the contact edit screen, if the input box frame is displayed in red, it means that the input data format is not accepted, please check and correct.

2.1.7 Authorized Information

Here you will see information of the WorldCard Cloud subscription, including how many users and the expired date; To add more users, please click the [Subscribe] button below to subscribe.

2.1.8 System Overview

Here will show how many business cards are currently available on the WorldCard Cloud server.

2.2 General Settings

2.2.1 Share Settings

Here you can choose whether you want to automatically share the new added contacts with the specific users or not. When Share Settings function is turned on, newly added contacts will be shared with the specified users, and the user you share to will receive the notification. To stop share, click ✖ to remove users from the sharing list.

For detailed information regarding Share Settings, please refer to Chapter 2.2.4 of [Web User Manual]. For notification, please refer to Chapter 2.3.

In addition, you can click the [Clear the contacts never being downloaded by any user] button to delete the contacts that belong to you but never downloaded by anyone, and this can let you save more useful information.

2.2.2 Display Settings

Under [Display Map of Address], you can choose an online map to display the address of contacts.

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

Under [Display Name Settings], you can decide the display order of first Name and last Name. Eastern names and western names can have different settings.

2.2.3 CRM/Address Book Settings

If the administrator enables the feature to connect CRM system or company address book, click CRM/Address Book Settings under General Settings, and input log in information of your CRM system or company address book. You can manually export contacts to CRM systems or company address book, or have WorldCard Cloud synced with CRM or company address book. WorldCard Cloud will sync with CRM system or company address book every 10 minutes if the sync function is on, and synchronize contacts with changes to the company CRM system or company address book for updates.

2.3 Notification

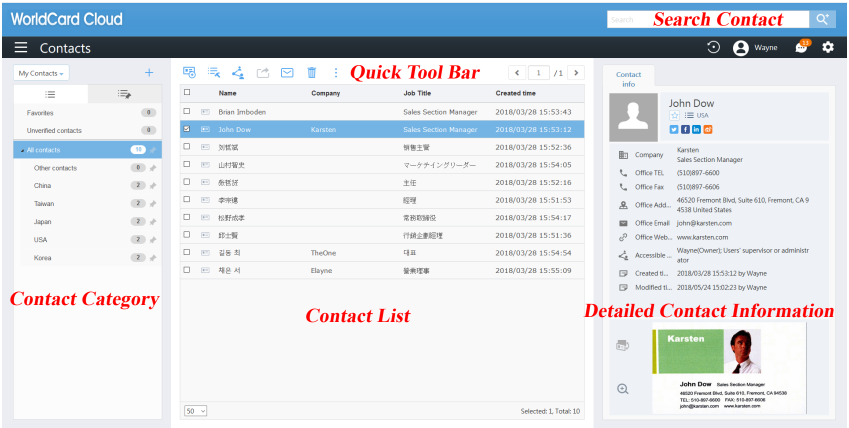
You will receive notification when someone shares a contact with you, or WorldCard Cloud settings have been updated. Click on the top right corner of the main screen to review messages.

Messages from the system or other users can't be deleted manually. The system has a limit of 500 messages to display. Once it reaches the limit, the oldest messages will be automatically deleted by the system.

If you are notified that someone shared a contact with you, you will see the key information of the contact in the notification, including name and company. You can select the contact and click to download the contact to [My Contacts].

Note: You can click Date / Sharer / Description on top of the screen to sort your notification messages.

Chapter 3 Getting Started



3.1 Add / Edit Contacts

3.1.1 Add Contacts

New contacts can be added manually on WorldCard team web version. Click from quick tool bar to add new contacts.

If the new contact is from the same company with an existing contact, click ⋮ from quick tool bar, then click [Add Contact – from the same company], the company information will be auto filled to the new contact.

3.1.2 Edit Contacts

To edit a contact, click ⋮ from the quick tool bar, then click [Edit]. You can also double click a contact from Contact List to edit. Under edit mode, you can use + / ⊖ to add or remove fields, and click can arrange the order of the fields.

Note: If the input field turns red during editing, please check the information and correct the error.

Edit Category / My favorite

The contact category can be changed on the contact list page. On the right side of the screen, click Other contacts under the contact name to change the category. You can also click to open each contact from the contact list, and click the same icon to edit category. The default category setting is Other Contacts. It is recommended to categorize each new contact for future convenience. Please refer Chapter 3 for more details.

Click under a contact name to add it to Favorites; click to remove a contact from Favorites.

Edit Profile Picture or Business Card Image

Click to upload profile picture. The picture file size must be less then 1MB.

Click to enlarge business card image to review. If you want to replace an existing image or add rear side image of a business card, click the same image area to upload. Click can delete the image.

Accessible Users (Share Contacts)

If you want to share a contact with other users, you can add their information to the Accessible users filed, it equals to share a contact to this user. Please refer to Chapter 3.2.4 for detailed information.

3.1.3 Delete contacts

Click from the quick tool bar to delete contacts. Please note, under Shared Contacts, only the owner of a contact and administrator have the right to delete it. However, if other users downloaded the contact information, then it can not be deleted. Please inform the users who downloaded the contact information to delete first, then you will be able to delete afterwards.

If you want to save some information, please refer to the [Export Contact] of Chapter 3.2.5 to export.

Tips: Press and hold Shift or Ctrl, then click the left Mouse button to select multiple contacts.

3.2 Utilizing Contact Information

Icons from quick tool bar and under each contact give you easy access to many functions.

3.2.1 Open website of a contact/Address Map

Next to the contacts list, under each contact, you can click the address to display the address on a map. Click the website to open it in a browser.

3.2.2 Email Contacts

Click from the quick tool bar, or click email address under each contact to send emails to your contacts.

3.2.3 Search Contacts on Social Media

Twitter/Face Book/LinkedIn/Sina WeiBo icons are available under each contact. You can click icons to search your contact on social media.

3.2.4 Share Contacts

WorldCard team users can only access to contacts which they are authorized to. The access right will be defined by the administrator. Normally supervisors will have access to team members' contacts, but the team members won't have access to supervisors' and each other's.

If you want to share contacts with other users, you can click from the quick tool bar. You can also open a contact, then click and add user names to the Accessible users field to share contacts.

The users you selected to share contacts to receive the notification and will be able to view the contacts, under your name in the [Shared Contacts] area. Please refer to Chapter 3.3 for more details about [Shared Contacts].

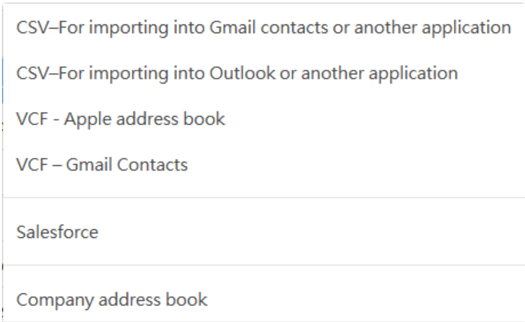
Note: When you share contacts with other users, their supervisors will also be able to see the contacts.

Note: The sharing feature applies to each single contact, and you can't undo it once a contact is shared. For example, after you shared a contact with A, you can't prevent A from viewing the contact. And A will only be able to see this particular contact, not other contacts in your contact list which are not shared.

3.2.5 Export Contacts

When using contacts, you can click on the quick toolbar to manually export contacts to the company's CRM system, or export them as CSV / vCard files to backup or for other applications to use; in addition, you can export contacts to company CRM or company address book. For related settings, please refer to chapter 2.1.5.

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



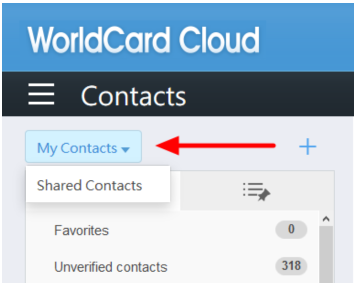
3.2.6 Search Contacts

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

Click [My Contacts] and [Shared Contacts] on top left corner to switch search target area. Click [Close] to go back to the main screen once search is done.

3.3 Shared Contacts

When other users share contacts with you, the contacts will be available under [Shared Contacts], as shown in the picture below, and you can switch between My Contacts and Shared Contacts.



Contacts under [Shared Contacts] are shared by users, and can't be edited directly. Please click from the quick tool bar to download contacts from [Shared Contacts] to [My Contacts], and then you can edit the downloaded contacts. When you download a contact and edit it under [My Contacts], the original contact under [Shared Contacts] will be updated too. If other users have downloaded the same contact, their record will be updated as well.

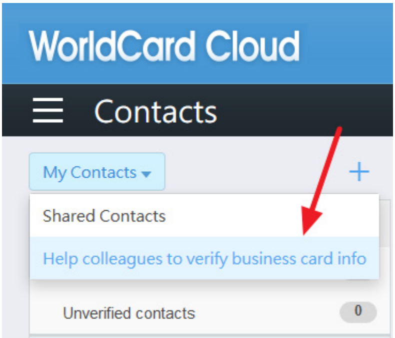
means a contact hasn't been downloaded yet. means a contact has been downloaded. You can also click to share a shared contact with other users, and their supervisor will be able to review it too.

Tip: In Accessible Users field, you can see the owner of a contact, and all other users who have access to the contact.

Note: If a contact has been shared a few times among different users, the owner displayed is still the original owner. For example, A, the owner shared a contact with B, and B shared the contact with you, you need go to A under the Shared Contacts to see the contact.

3.4 Help Colleagues to Verify Business Card Info

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



3.5 Notification

You will receive notification when someone shares a contact with you, or WorldCard Team settings have been updated. Click on the top right corner of the main screen to review messages.

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If you are notified that someone shared a contact with you, you will see the key information of the contact in the notification, including name and company. You can select the contact and click to download the contact to [My Contacts].

Note: You can click Date / Sharer / Description on top of the screen to sort your notification messages.

Chapter 4 Category Management

4.1 Add / Edit Category

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

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

4.1.1 Add Main Category

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

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

4.1.2 Add Subcategory

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

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

4.1.3 Edit Category

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

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

4.1.4 Pin a Commonly Used Category

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

4.2 Edit Category

To manage contacts efficiently, it is recommended to categorize all new contacts.

Besides the methods mentioned in 3.1, you can select contacts and then click from the quick tool bar to edit categories. You can also open a contact, and then click the current category to edit it. The category is above the profile photo.

If you add a new contact under certain category, the contact will belong to the category automatically. So if you need to add a contact that doesn't belong to any category, please add it under [Other Contacts] category.

Note: A contact can have multiple categories in WorldCard Cloud system. For example, contact A can be categorized as friend and coworker at same time.

Tips: You can drag a contact with left button of the mouse, and drop it to a different category folder to change the category quickly.

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