# WorldCard Team Service

# Administrator Manual

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How long you visited our sites or used our apps and which services and features you used

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This Agreement is governed by the laws of Republic of China (ROC).

# Menu

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

# History

v1.7.0

- Add company address book access function.

v1.6.0

- Change default password to "penpower".

- Suspending user become unable to log in and cannot be shared.

- Can set conditions to automatically suspend any user account.

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

v1.5.0

- Year 2019, first version.

# Chapter 1 Login to WorldCard Team Service

## 1.1 First Time Login

When you apply for the WorldCard Team Service, you will receive an email with the WorldCard Team site information you have set up. Please open the browser to connect to the WorldCard Team website (**wct.worldcardteam.com**) provided in the email. Please use this URL to link to the WorldCard Team in the future.

*Recommended Browsers:  Internet Explorer 11/ Edge / Chrome/ Firefox / Safari / QQ / Sogou.*

Once connected, please use the account you set up and the password provided in the email to log in for the first time.
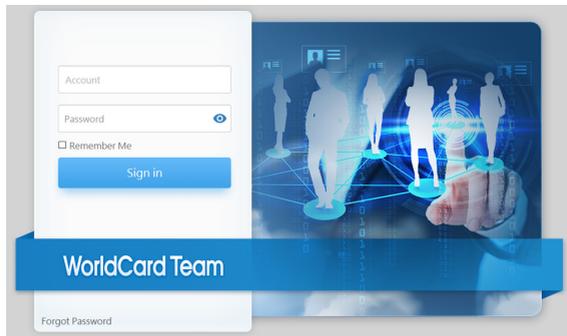


After logging in, please set the password. In the future, please log in with your new password. Once you've set your password, sign in again with your new password to get started with WorldCard Team. After logging in, we suggest you watch the tour to quickly learn about the function block.

# 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.
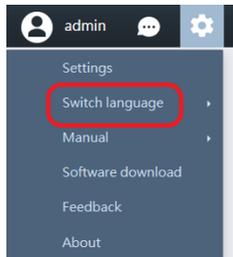


## 1.2.3 Back to Homepage / Sign Out

Click the word [WorldCard Team] 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 Team Settings

## 2.1 Admin Settings

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

WorldCard Team 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 (PC version-specific features), please check the relevant options, please click the [OK] button to complete the account. Add or edit.

*Note:*

*1.    Please contact the administrator to obtain log in information: webpage and account name; defaultpassword is "penpower", please change your password after the first login.*

*2.    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.
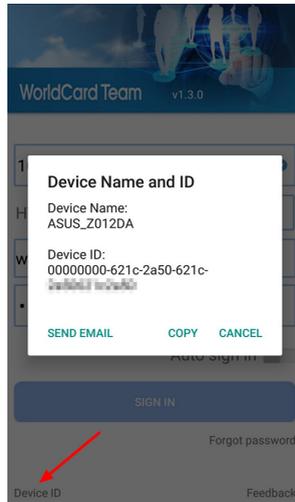
*Reminder:*

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 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. .

## 2.1.3 Sharing Rules

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

<u>Standard Sharing</u>
- 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.

<u>Company-wide Sharing</u>
- All contacts have been shared, each account can view the company-wide contacts.

## 2.1.4 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 Team 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 Team synced with CRM or company address book. WorldCard Team 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.

## 2.1.5 Custom Field

WorldCard Team 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.*

## 2.1.6 Authorized Information

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

### 2.1.7 System Overview

Here will show how many business cards are currently available on the WorldCard Team 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 Team synced with CRM or company address book. WorldCard Team 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 Team 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 WorldCard Team Applications Installation

◎ **Windows**

To install WorldCard Team application, please open web browser and access (http://download.worldcardteam.com/) to open download page, then click [WorldCard Team (Windows)] to download. When the download is finished, please double click it to start install.

After installing and launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

◎ **Mac**

To install WorldCard Team application, please open App Store  in Mac system, and enter [WorldCard Team] in the upper-right search bar to search.

Click [Get] button, and enter your Apple account / password to start download. When the download is finished, you will be able to find WorldCard Team application in [Applications].

After launching the WorldCard Team application, please enter the WorldCard Team server URL and key in your account / password to log in.

◎ **iOS / Android**

To install WorldCard Team app, please open App Store / Google Play in your iOS / Android device, and search [WorldCard Team] to download and install.

Or you can read the QR code below to access the download page:

<u>**iOS**</u>                                                            <u>**Android**</u>



After downloading and launching the WorldCard Team app, please enter the WorldCard Team server URL and your account / password to log in.

# WorldCard Team Service v1.8 Administrator Manual

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