

cardlio

User Handbook

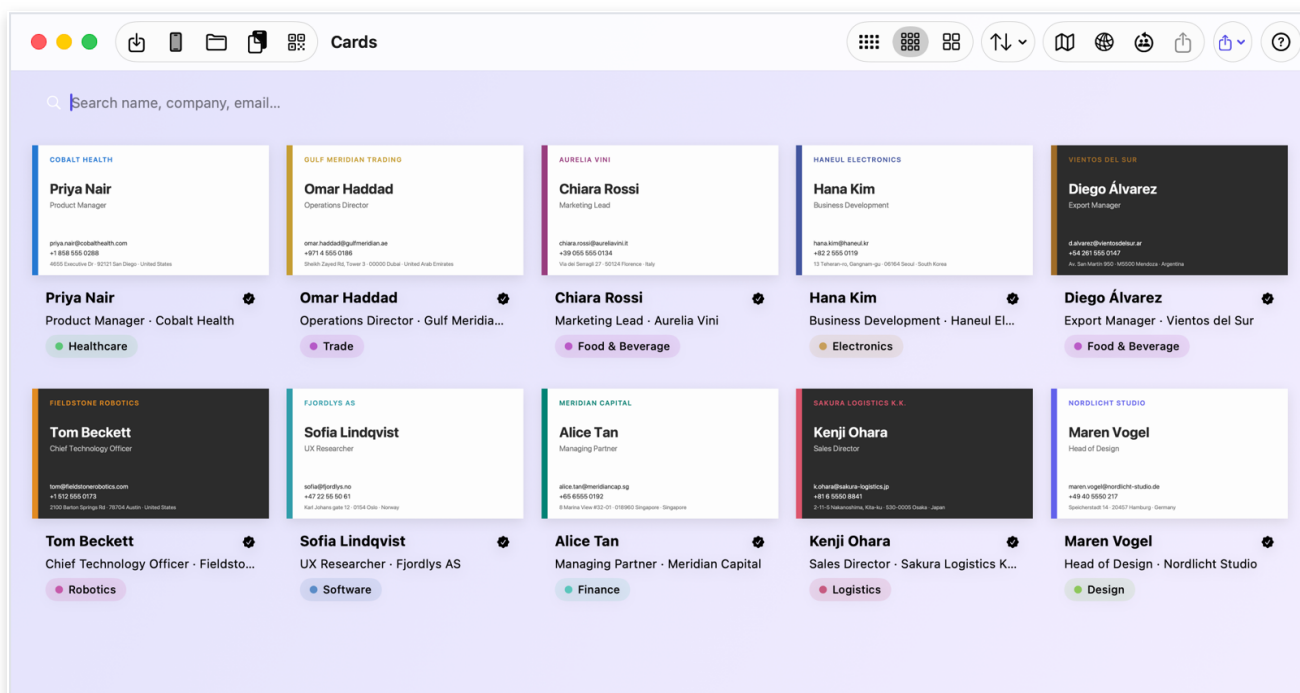
cardlio turns business cards into clean, structured contacts — entirely on your device. Scan with the camera, import photos, or paste an email signature; review the result; then export to Contacts, a spreadsheet, or your CRM. This handbook walks through every feature on **iPhone, iPad, and Mac**.

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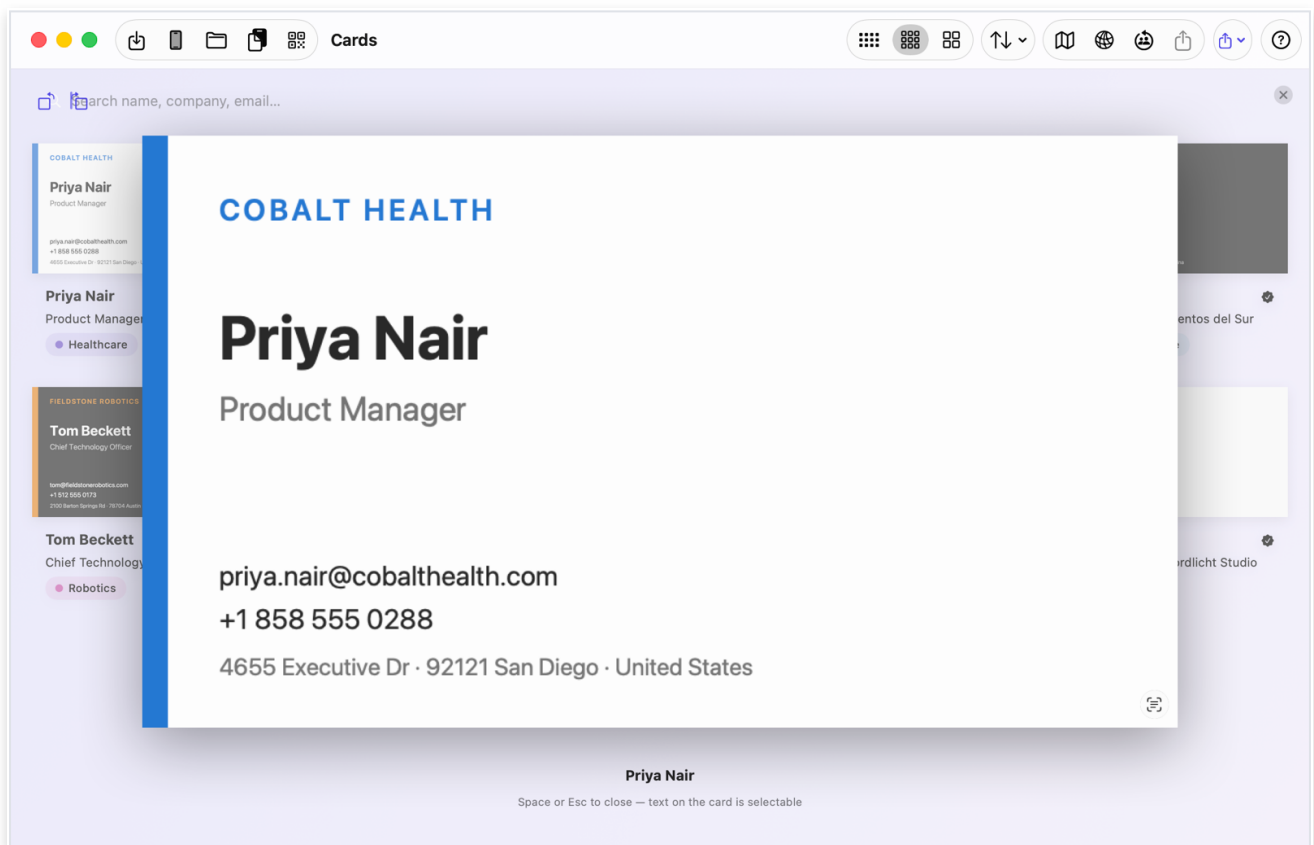
The main window & toolbar

The main window is your card library. On **Mac** it's a resizable gallery of card tiles — the toolbar's grid control switches between three tile sizes, so you can browse cards big or fit a whole library on screen. On **iPhone and iPad** everything lives in a tab bar — **Cards**, **Map**, **Stats**, **My Card**, and a dedicated **Search** tab — with the capture actions floating just above it. Search by name, company, city, or email at any time — and as you type, cardlio suggests **filter tokens** for countries, companies, and industries, so a country name can mean **cards from that country** rather than cards containing the word.



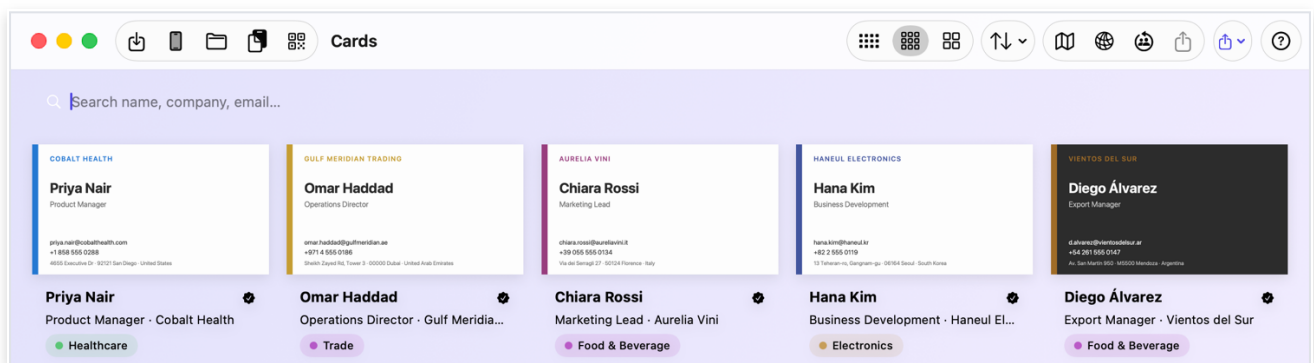
The Mac library. Each tile shows the person, company, and card image; click a tile to edit it in the inspector.

The Mac gallery is fully keyboard-navigable: arrow keys move the selection, typing a name jumps straight to it, **Space** shows the card big, **⌘** deletes (after confirming), and **⌘F** jumps to search. The enlarged preview doubles as the photo workbench: the card is Live Text (select and copy anything printed on it), the arrow keys flip through cards while it's open, and its buttons rotate the card, open **Edit photo** — crop, brightness, contrast, saturation — and show the raw OCR text. Rotate and Edit Photo are also in every card's right-click menu.



The gallery preview: Space enlarges the selected card, with Live Text on the photo.

The toolbar gathers every action. Related buttons are grouped into segments; the **Help** button sits on its own at the trailing edge so it's always easy to find.



The Mac toolbar. Left to right: add / import, Scan with iPhone, open library, paste signature & My Card, tile size & sort, the Map · Stats · Duplicates group, Share, Export — and the separated Help (?) button.

- **Add Files / Import** — bring in card photos or PDFs.
- **Scan with iPhone** — use your iPhone or iPad as the Mac's camera (see the capture chapter).
- **Map · Stats · Duplicates** — visualize, analyze, and clean up your library.
- **Share / Export** — send a single card or export the whole library.
- **Help (?)** — opens the in-app handbook (a shorter version of this document).

Deleting is safe: on iPhone and iPad an **Undo** button appears for a few seconds before the delete becomes final (deletes sync to all your devices), and on the Mac a confirmation asks first. On iOS, your contacts also appear in **system Search (Spotlight)** — tapping a result opens the card directly.

Getting started — capturing a card

There are several ways to bring a card into cardlio. All recognition happens on-device, so you can scan anywhere, online or off.

Camera & AR scanner (iPhone / iPad)

Scan opens the document scanner: point at a card, capture with edge detection, and keep going to build a batch. **AR Scan** shows a live view that draws a box around every card it sees — a whole tabletop of cards at once; when the boxes turn green, tap the shutter — or turn on **Auto-capture** (the camera-with-clock button) and it fires by itself a second after the cards hold steady. Rotated or skewed cards are straightened for you, and a progress card shows which card cardlio is reading while the batch processes — on iPhone the same progress also lives in the **Dynamic Island** and on the Lock Screen, so you can flip to another app while a big batch finishes.



Live camera capture

Screenshot unavailable — the live camera and AR scanner can only be captured on a physical device.

Scan with iPhone (Mac)

The Mac can borrow your iPhone's camera: click **Scan with iPhone** in the toolbar, pick your device, and take the photo (or scan a stack with **Scan Documents**) on the phone — the capture lands straight in the Mac's scan pipeline, no cables or AirDrop involved. Your iPhone just needs to be nearby, on the same Apple ID, with Wi-Fi and Bluetooth on.

Photos, Share sheet & Paste

- **Photos** — import one or more card images from your library.
- **Share sheet** — share a card image (or a copied email signature) from any app straight into cardlio. A photo of several cards is detected and handed to the full scanner — every card lands in the review screen.
- **Paste a signature** — paste the text of an email signature and cardlio builds a card from it, no photo needed.

Reviewing & editing a scan

After a scan, cardlio shows a review screen before anything is saved. Each field carries a validity badge, and anything the parser was unsure about is easy to correct. You can drop a stray detection without discarding the rest of the batch.

The screenshot shows the 'Review' screen in the cardlio app. It displays two business cards for review. The first card is for Masanori Terada, with fields for Name, Honorific, Company, Title, Mobile, Phone, Email, and Website. The second card is for Emily Chen, with fields for Name and Honorific. A green 'Save 6 cards' button is at the bottom right, and a 'Discard' button is at the bottom left.

The review screen. Green badges mark validated fields; every field is editable, and the button saves the whole batch at once.

- Tap any field to edit it — the card preview **zooms to the exact spot** that value was read from and outlines it, so checking a shaky value never means squinting. On iPhone, a snippet of that spot also appears right above the field you're editing.
- The preview is **Live Text**: select and copy a line straight off the photo if the scan missed it.
- A small **sparkle** next to Name, Company, or Title means on-device AI is still polishing that field in the background. The instant you edit a field it's yours — AI never overwrites your edits.
- Hard-to-read card and a cloud AI key configured? That card offers a one-tap **refine with Claude or Gemini** that re-reads the photo with your chosen provider — one card, one tap, one request.
- The **address** — street, postal code, city, country — is editable right in the review, with a badge showing whether Apple Maps verified it.

- A green check means the value looks valid (e.g. a well-formed email or phone); a yellow question mark means the text engine wasn't confident — worth a glance.
- Cards with **more than one email address** show each in its own row — Email, Email 2, and so on. Clear a row and it's dropped on save.
- **WeChat and LinkedIn** are captured when the card prints them — a "WeChat: ..." line or a linkedin.com address — into their own fields, so a WeChat ID never lands in a phone field. They travel with the contact into vCards, CSV exports, Apple Contacts (LinkedIn as a social profile, WeChat as an instant-message address), and Office 365.
- Use the trash icon on a card to remove just that one from the batch; **Discard** always asks first.

On the free tier, a scan that would pass the card limit is never thrown away: the review sheet warns up front, keeps your reviewed cards and edits, and lets you unlock and save them on the spot.

How recognition works

Recognition combines the card's **text** with its **visual layout** — the largest text near the top is treated as the name, keyword and language cues separate title from company, and the on-device text engine pre-detects emails, phones, and addresses. That layered approach handles many awkward real-world cards:

Topic Detail

Recognition is on-device and uses both the text and the card's visual layout, so it handles many awkward real-world cards:

- **ALL-CAPS names** (e.g. "MASANORI TERADA") are recognized as the person, not the company, and shown title-cased.
- **Department titles** like "Superintendent, Technical Dept." are captured as the job title.
- **Japanese addresses** in romaji (e.g. "Kure Hiroshima") resolve the city and prefecture.
- **Spaced-out emails** (e.g. "s. tanaka @ eifukukaiun. co. jp") are repaired into a valid address.
- **Multi-office cards** keep the primary office; the rest go to Notes.

If something is still off, just edit the field — corrections are quick and the card saves immediately.

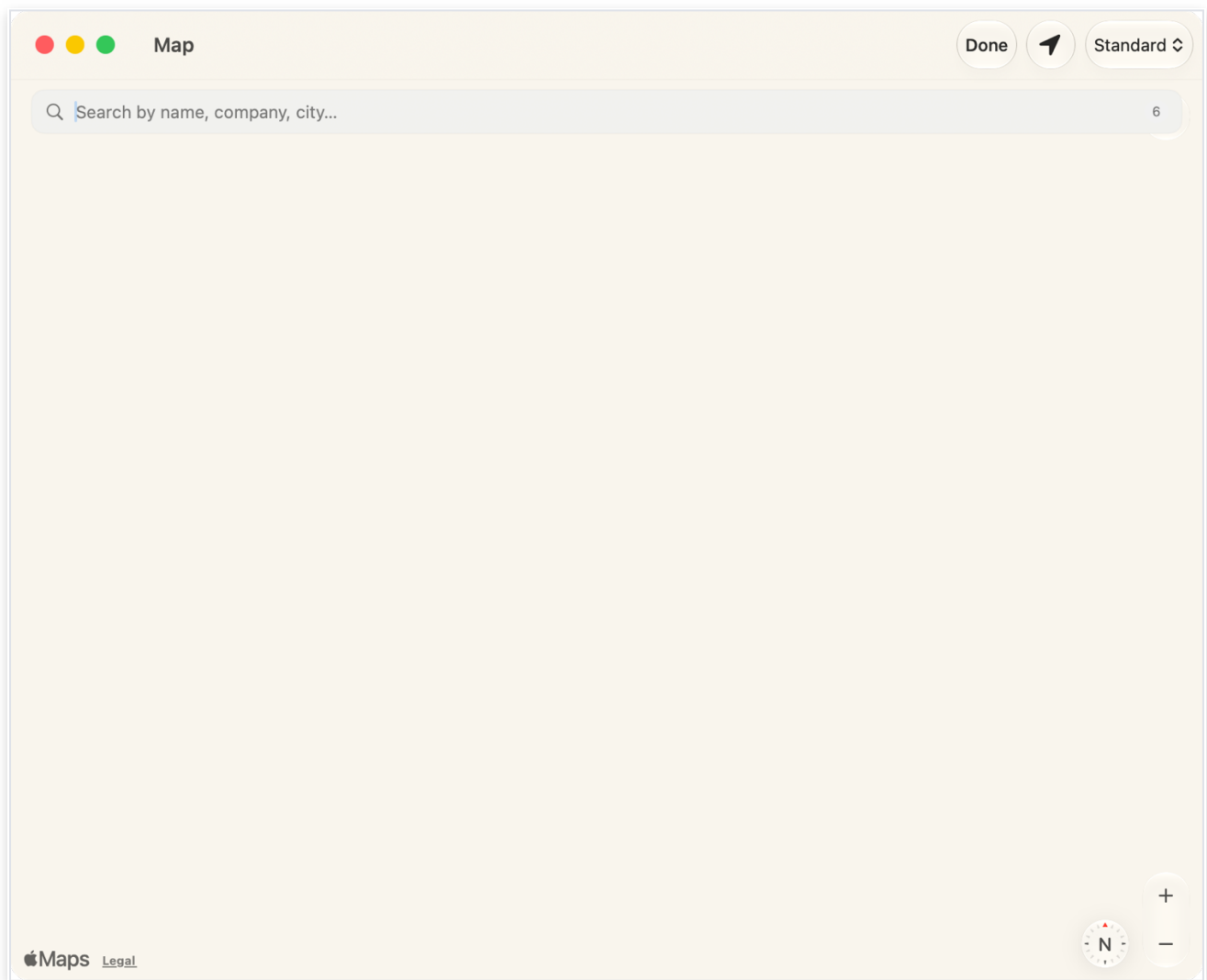
The in-app explanation of the recognition edge cases cardlio handles automatically.

- **ALL-CAPS names** are recognized as the person, not the company, and shown title-cased.
- **Department titles** like "Superintendent, Technical Dept." are captured as the job title.
- **International addresses** are read across country formats — city, postal code, and country land in the right fields.
- **Spaced-out emails** ("j. smith @ example. com") are repaired into a valid address.
- **Multi-office cards** keep the primary office in the address fields and preserve the rest in Notes.

If anything is still off, just edit the field — corrections are quick and the card saves immediately.

Addresses & the map

Every address is checked against **Apple Maps** to normalize the city, postal code, and country, and to drop a pin. Verification runs automatically on scans, imports, pasted signatures, and shared cards — no third-party service, and nothing leaves Apple's ecosystem.

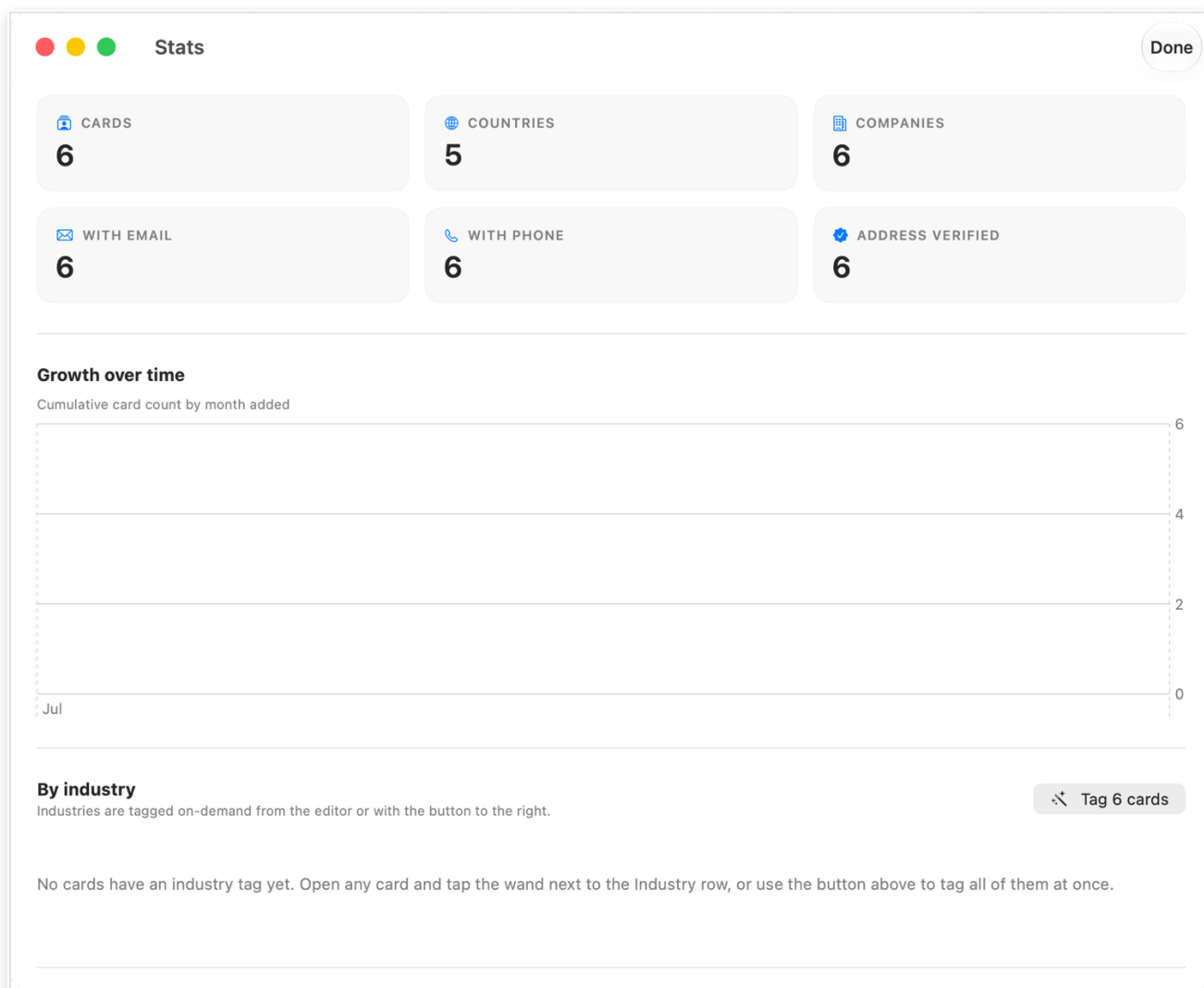


The Map screen. Search across your contacts and see them alongside your location. (Map tiles and pins require a network connection; this render was captured offline.)

- Nearby pins collapse into a **count badge**; tap it to zoom in.
- When several people share the **same address** — colleagues at one company, say — tapping the badge lists their cards, and each row opens the card with directions one tap away.
- Tapping a pin's card takes you straight to it in your library.

Network stats

The Stats screen summarizes your library at a glance: how many cards you have, how many countries and companies they span, and how completely they're filled in. A growth chart tracks cards added over time, and you can tag cards by industry.



The Stats screen with a sample library of six cards across five countries.

AI refinement

On top of the built-in parser, cardlio can optionally use AI to decide which line is the person versus the company on especially tricky cards. This is always optional — the deterministic parser handles everything on its own.

- **On-device (Apple Intelligence)** — private, offline, no key required. Available on supported devices.
- **Cloud (bring your own key)** — Anthropic Claude or Google Gemini for the hardest cards. Add a key under Settings.

Both appear in the review sheet: the on-device pass polishes name, title, and company automatically while you review (the sparkle next to a field), and when the OCR was shaky a one-tap cloud refine is offered right on that card. Cloud AI can also be run any time from a saved card's editor.

Cloud AI is opt-in. Your API key is stored in the Keychain and is only ever sent to the provider you choose. With no key and no Apple Intelligence, nothing is sent anywhere.

With Apple Intelligence available, a card's editor also offers **Draft Follow-up** (envelope button on iPhone; right-click a card on Mac): the on-device model turns the card's details and your voice-note context into a ready-to-edit follow-up email — pick a tone (Professional, Warm, Brief), tweak the text, and open it in Mail or copy it. The draft never references anything that isn't on the card or in your notes, and nothing is generated or sent through any server.

Exports — Contacts, CSV & Salesforce

Export a single card or your entire library. On Mac, use the Export menu in the toolbar; on iPhone and iPad, the Export button opens the share sheet.

- **vCard (.vcf)** — imports into Apple Contacts, Outlook, Google Contacts, and both iPhone and Android.
- **Generic CSV** — every field, for spreadsheets.
- **Outlook CSV** — the column names Outlook's import expects.
- **Salesforce CSV** — headers that auto-map in Salesforce's Data Import Wizard; records import as **Leads**.

All CSV exports are hardened against spreadsheet formula injection, so a value that begins with =, +, or @ can't execute when the file is opened — and phone numbers stay clean when the file is imported into Outlook or Salesforce.

Office 365 & Contacts sync

Beyond files, cardlio can put your cards straight into your contacts — either your Microsoft **Office 365** mailbox or your local **Apple Contacts**.

Sync to Office 365 (Outlook)

Connect your Microsoft account once — on **Mac** under Settings → Office 365, on **iPhone and iPad** in Settings — then choose **Sync to Office 365** from the Export menu. The sync is one-way, from cardlio into your Office 365 contacts.

- Run it any time: new cards are **added**, edited cards are **updated**, and deleted cards are **removed**.
- Each contact is linked to its card by a hidden identifier, so repeat syncs **never create duplicates** — even after a reinstall or on a new Mac.
- Fields map to Outlook's own, including **Business Fax** and the full postal address.
- Contacts go **only to your own Microsoft account** — nothing passes through a server we run.

Save to Contacts (Apple Contacts)

Prefer your cards in iCloud or On My Mac? On the Mac, **Save to Contacts** writes them into the Apple Contacts account you choose; on iPhone and iPad, the **Add** button on a card opens the system contact editor so you review and pick the account.

- If your Office 365 account is connected, use the sync above for Outlook rather than pointing Save to Contacts at an Exchange account — aiming both at the same mailbox can create duplicates. The account picker reminds you.
- Card images aren't attached to contacts, so your address book stays light on every device.

iCloud sync

Cards sync across your devices through your **private iCloud database** — only you can see them. Sign into the same Apple ID on each device and new scans and edits propagate automatically in the background. There is no server that we operate; sync is entirely Apple's CloudKit.

Sharing your card — link, QR, NFC & Wallet

Create **My Card** with your own details and hand it out any way the moment calls for. Nothing is required on the other end — no app, no account. You can keep **multiple cards** — Work, Personal, a side project — and switch with the selector above the QR; every share method (link, QR, NFC, Wallet, widget) presents the selected card, and all cards sync across your devices.

My Card

Done



Scan to add me to contacts



Alex Rivera

Product Lead · Solstice Design Co.

Standard vCard 3.0 — any phone's built-in QR scanner adds this card as a contact. No app required on the other end.

 Add to Apple Wallet



SHARING

- | | | |
|---|---------------|------------------|
|  | Share Link | with photo |
|  | QR shows | vCard · Web link |
|  | Write NFC Tag | NTAG216 |

My Card: scan the QR, tap the NFC tag, or add the card to Apple Wallet.

- **Share Link** — sends a cardlio.app link (including your photo) through Messages, Mail, or AirDrop. Opening it shows your card in the browser with an Add to Contacts button. Your details are encoded inside the link itself — in the part of the address that browsers never send to any server — so nobody but the recipient ever sees them.
- **QR code** — the on-screen QR shows the compact web link by default (the same page an NFC tag opens); the toggle switches to a standard vCard 3.0 that any phone's camera imports fully offline.
- **QR widget** (iPhone) — add the **My Card QR** widget to your Home Screen for a scannable code at a glance, or to the Lock Screen for a one-tap jump to your full-screen QR. Find "cardlio" in the widget gallery.
- **Contact photo** — after picking a photo, drag and zoom it to sit perfectly in the circle; the **Adjust...** button re-crops it any time.
- **NFC tag** — write your card link to an **NTAG216** tag. A tap on an iPhone (XS or newer) or Android phone opens your card, straight from the lock screen. Smaller tags usually don't have enough memory; the app tells you when a tag is too small.
- **Apple Wallet** — one tap on **Add to Apple Wallet** puts your card in Wallet on iPhone, with the QR on the front — no setup or certificates needed. Creating the pass needs a connection; afterwards it works offline forever. On the Mac, cardlio builds the pass file so you can AirDrop it to your iPhone.

NFC tags and QR codes carry a compact card without the photo — tags are tiny. Links from the Share Link button include it.

Siri, Shortcuts & Control Center

Your library is available to Siri and the Shortcuts app as building blocks (iPhone and iPad; the export action also works in Shortcuts on the Mac):

- Say "**Scan a card in cardlio**" to jump straight into the scanner, or "**Open a card in cardlio**" and pick the contact.
- The **Open Card** action deep-links to any card — the picker searches your library by name, company, or email.
- **Export Card as vCard** hands a .vcf file to the rest of your shortcut — save it to Files, attach it to an email, feed it to any action that accepts files (premium, like all exports).
- A **Scan Card** button is also available for Control Center — scanning is two taps from anywhere.

Voice notes

Record a short voice note after a scan — "met at the expo, follow up on pricing" — and cardlio transcribes it into the card's Notes, cleaned into concise bullet points when Apple Intelligence is available.

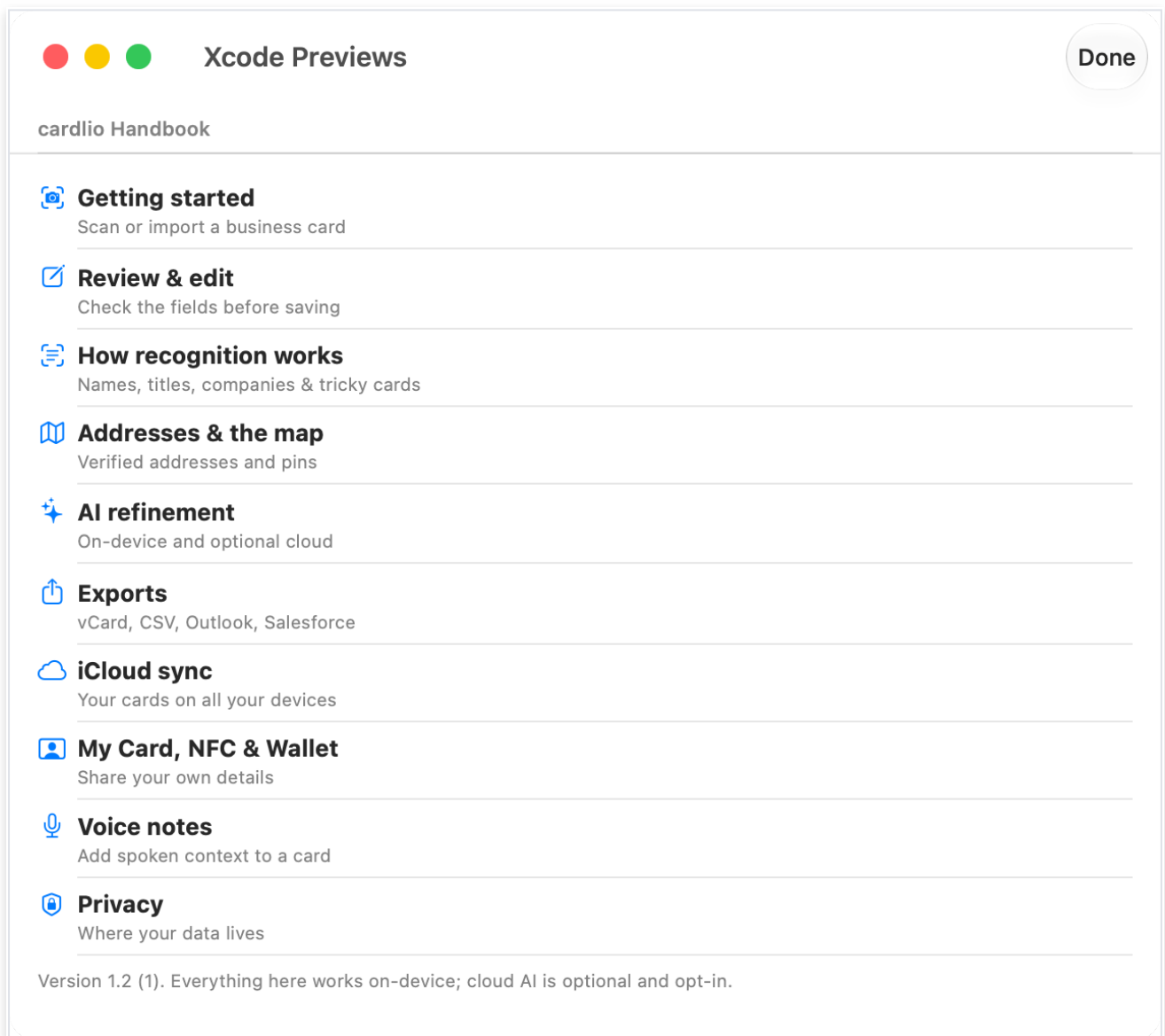


Voice note recorder

Screenshot unavailable — the recorder is a live-audio flow best captured on a device.

The in-app handbook

A shorter version of this guide is built into the app. Open it any time from the Help (?) button on Mac, or the Handbook item in the menu on iPhone and iPad. It works offline and always matches the version you're running.



The in-app handbook — the same topics, one tap away inside cardlio.

Privacy & your data

cardlio is built to keep your contacts yours:

- OCR, parsing, and on-device AI all run **locally** on your device.
- Sync uses **your private iCloud** — there is no server we operate.
- Cloud AI and address lookup are opt-in; cloud AI only runs if you add your own key.
- API keys live in the **Keychain** and never sync off your device unless you enable iCloud Keychain.
- Shared card links carry your card **inside the link itself** — no server ever receives it. Creating a Wallet pass sends your card once to the signing service, which stores and logs nothing.
- **Office 365 sync** sends contacts only to your own Microsoft account, using permissions you grant at sign-in; the sign-in token lives in the Keychain, and we never see your Microsoft credentials or your contacts.

Tips & troubleshooting

- **Sharpest scans:** fill the frame with the card, keep it flat and well-lit, and avoid glare.
- **Cards missed or over-detected?** Adjust **Detection confidence** in Settings (Mac: Settings → Scanning). Lower it to catch faint, glary, or unusually designed cards; raise it to reject things that aren't cards. Default is 75%.
- **A field looks wrong?** Tap to edit — the fix saves immediately and future scans aren't affected.
- **Map is blank?** Pins and tiles need a network connection; addresses still verify and store their coordinates.
- **Card not syncing?** Confirm the same Apple ID and that iCloud Drive is enabled on each device.
- **Duplicates piling up?** Open the Duplicates tool to review and merge matches.