



Print It

(A new way of printing Contacts Directories)

User Manual (Version 1.0)

A Product of Astrea IT services, NOIDA

www.astreait.com

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Overview

Print It, is an app which enables the users to create the directory of the contacts in their salesforce organization. Using this app, you will be able to generate an impressive PDF document with a list of contacts in your organization in a simple click. This is a native salesforce app, built on force.com platform and developed for the Contact object.

All users can use this app and its usefulness can vary on the roles of the user for example a marketing manager will target the potential customers from time to time and this app will provide a very effective way of creating a list of useful contacts from the list view. On the other hand, a customer relationship manager will only need the contacts with any queries, complaints or issues.

Functional Description

Welcome to our Print It application. Our application can be used very efficiently due to its easy to understand operations and user friendliness. With a single click you can create a Print It of all your contacts or you can select only the ones you need.

Print It, provides you a functionality of uploading and associating the images for your contacts and then creating a directory of your contacts with details like their Organization Name, Title, Name, Uploaded photo and contact details. You will have four buttons on the standard list layout and user can use the buttons to generate pdf directories.

Operations for User

The users can perform the following operations using Print It.

Upload an Image

All the contacts can now have their images along with other information and it is a click away.

1. Open a contact detail page by clicking on any contact from the contacts tab or the list of contacts.

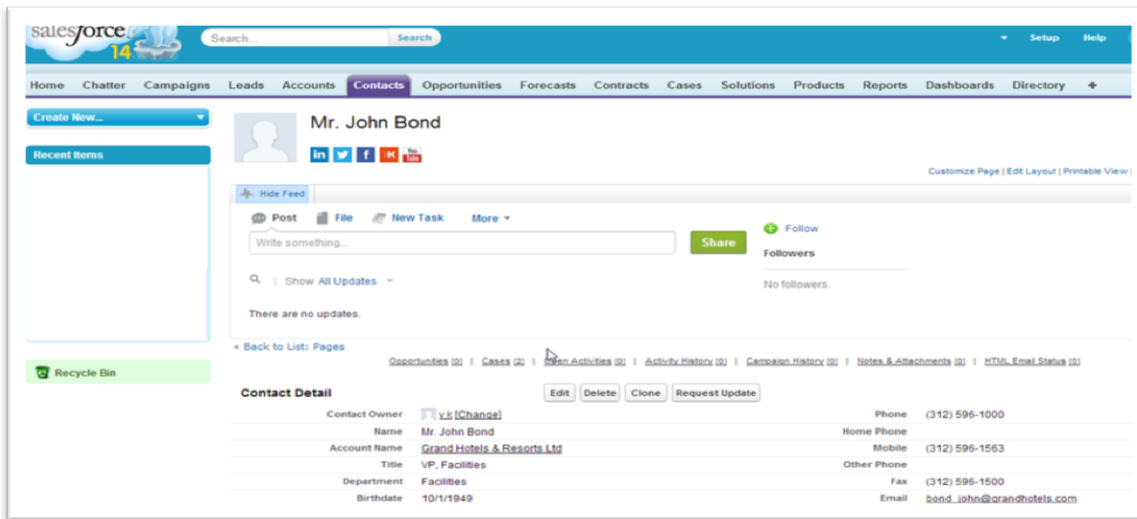


Figure 1: Contact Detail Page

2. Navigate to the Upload a photo section which is a component of this app and is added on the contact page layout (as described in the installation Guide section).
In this section, browse to the location of the image by clicking on the choose button and select the file.
3. After selecting the file, click on upload.

That's it, your image will be uploaded and displayed in the same section of Upload a photo.

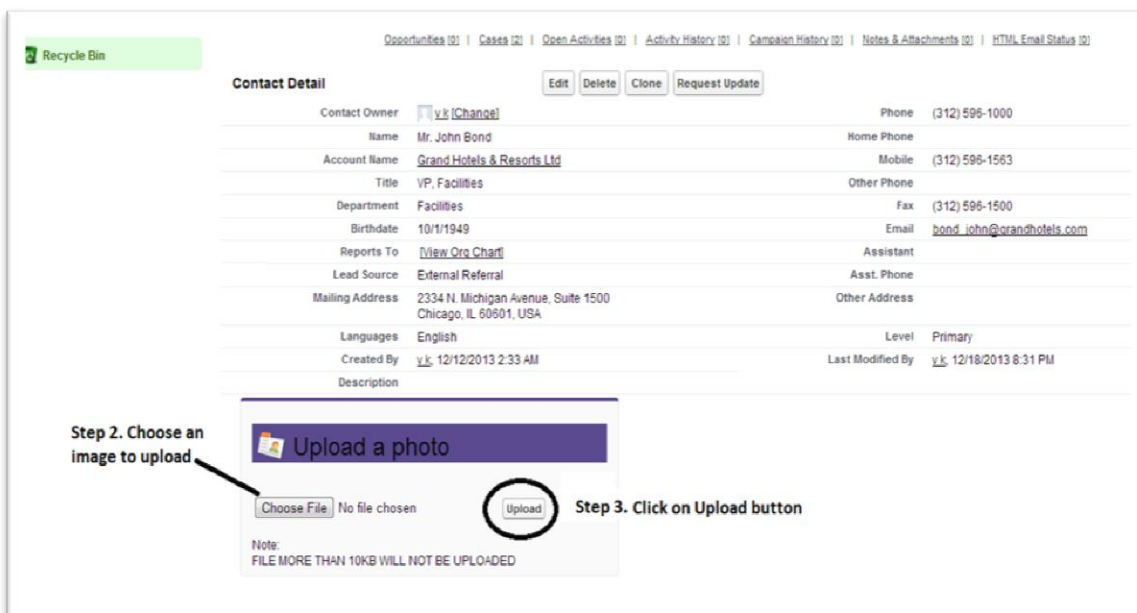


Figure 2: Contact detail page with Upload a photo Section

Please Note:

- There is a predefined format for the files to be uploaded that is JPEG, JPG, PNG, GIF or BNP only. The user will receive an error message if any other file is uploaded.
- There is also a fix size of the image to be uploaded that is 50KB, all the files more than this size will not be saved and user will get an error message.

Generate an “All contacts directory”

To generate a directory of all the contacts in an organization, the user can click on the tab called “Directory” which is a component of this app (can be added on the page, as described in the installation Guide section).

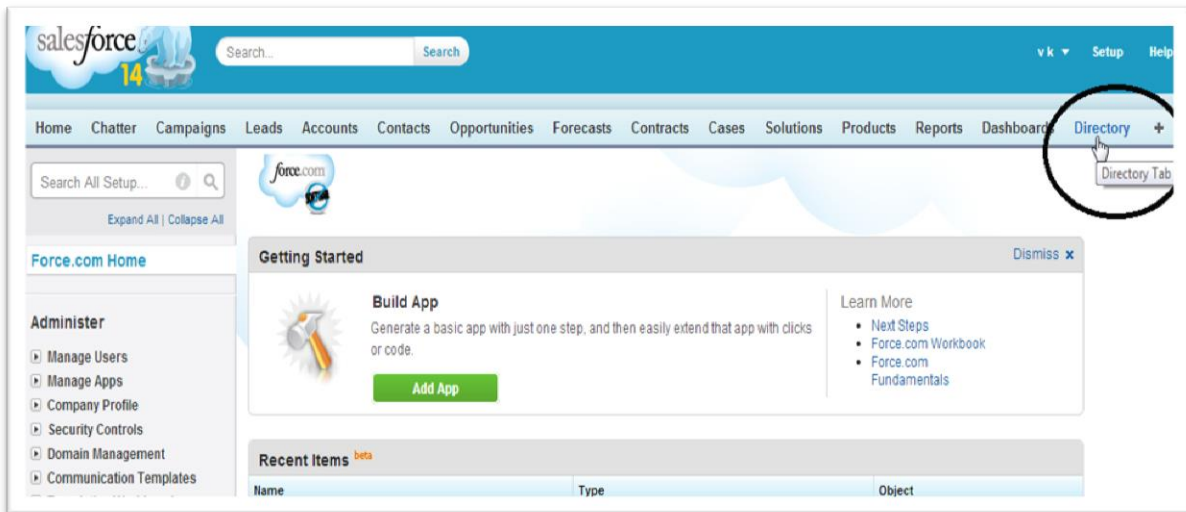
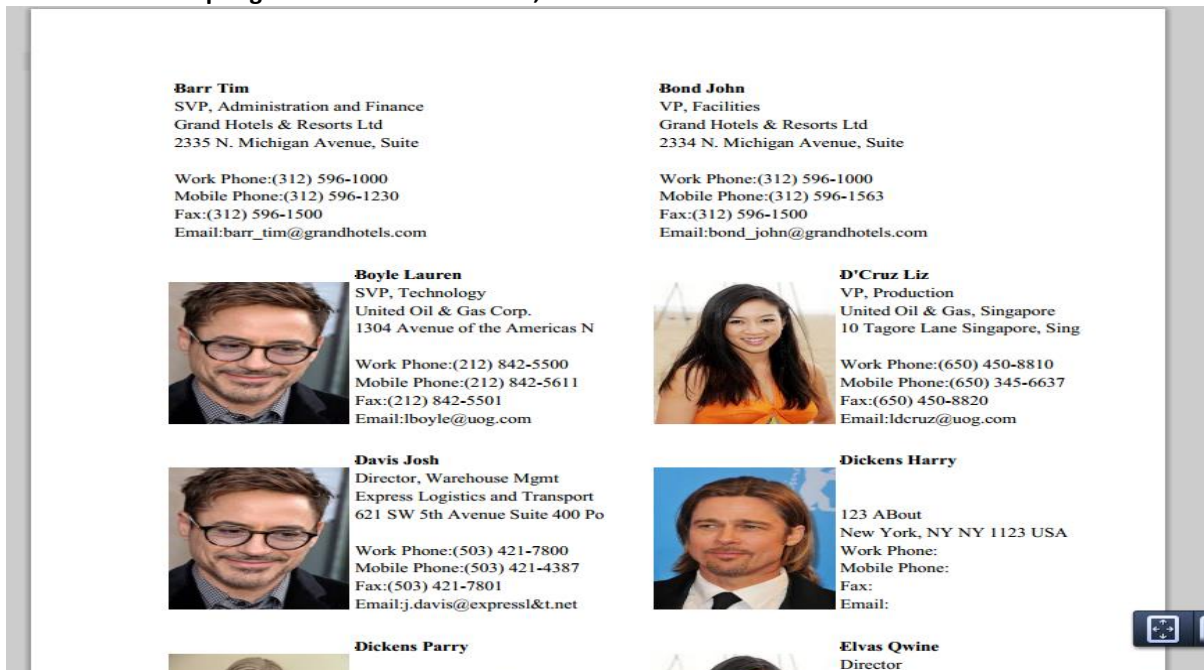


Figure 3: Directory Tab for creating an All Print It

The format of Output generated will be like this,



Generate a directory “From a List view”

You can also generate a Directory of contacts according to your preference that means you can select only those contacts you need and get a directory of the selected contacts.

Print It, provides the ability to select the contacts from the list view of Contacts and an option of printing the Directory with images or without images is also provided to the users.

1. Open the list view of the contacts by clicking on the contact tab and selecting the appropriate view.

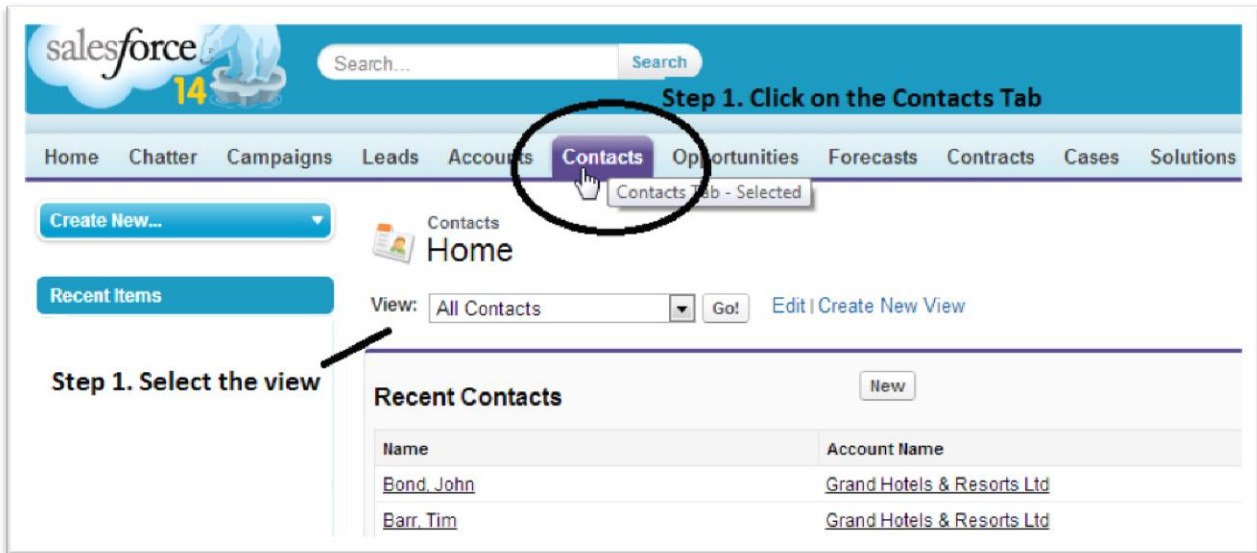


Figure 4: Contacts tab and List view of contacts

2. Once the list view of contacts is loaded, you will have the option to print a few selected records or all the records in that view.

For printing the selected Records

- Select the contacts you want to include in the directory and click on the “Directory selected” button.
- If you want to include images of the contacts in your Directory then click on the “Directory selected with Images” button (these buttons are components of this app and can be added on the list view page, as described in the installation Guide section).

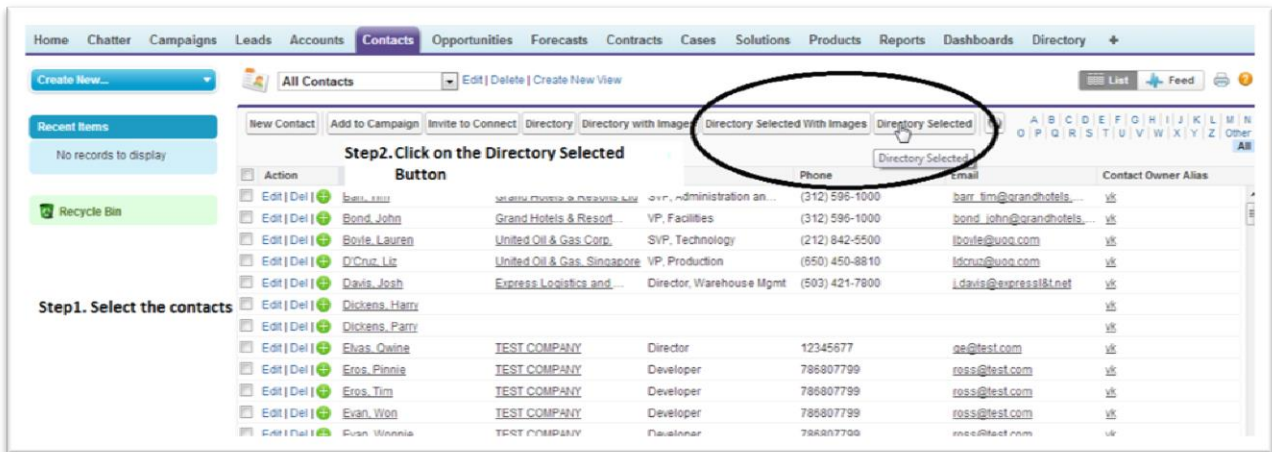


Figure 5: Contact List view for selecting contacts and creating a Directory

For Printing all the records of the view

- Similar to the above steps, you will select the contacts you want to include in the directory and click on the “Directory” button.
- If you want to include images of the contacts in your Directory then click on the “Directory with Images” button (these buttons are components of this app and can be added on the list view page, as described in the installation Guide section).

The output for the above will be similar in the case of “Directory button” and for “Directory selected” the output will be like below (the difference in the “Directory with Images” button and for “Directory selected with Images” button is that they will include images of the contacts).

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The buttons used in the list view have different functionalities; the table below describes what action takes place on clicking the button.

Button	Description	On Click Action
Directory	Used to print all the Contacts in the List View	Generates Directory without images
Directory with Images	Used to print all the Contacts in the List View	Generates Directory with images
Directory Selected	Used to print the selected Contacts from the List View	Generates Directory without images
Directory Selected with Images	Used to print the selected Contacts from the List View	Generates Directory with images