



Print It

(A new way of printing Contacts Directories)

Installation Guide (Version 1.0)

A Product of Astrea IT services, NOIDA

www.astreait.com

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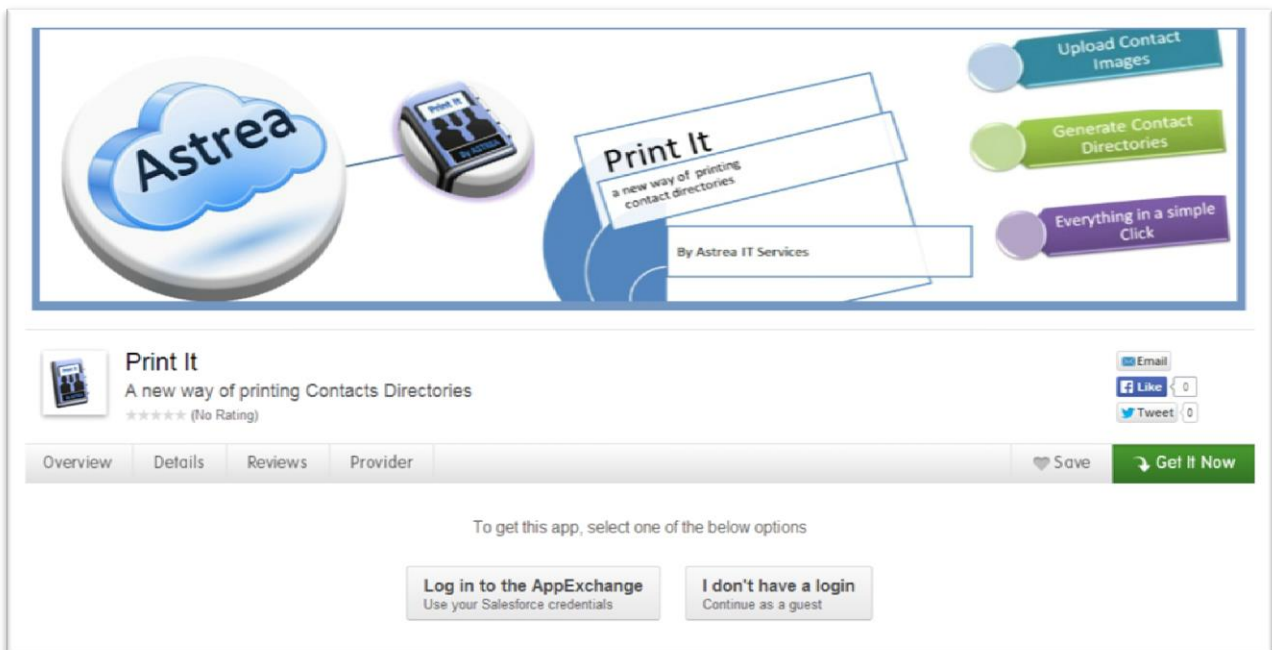
Installation Guide

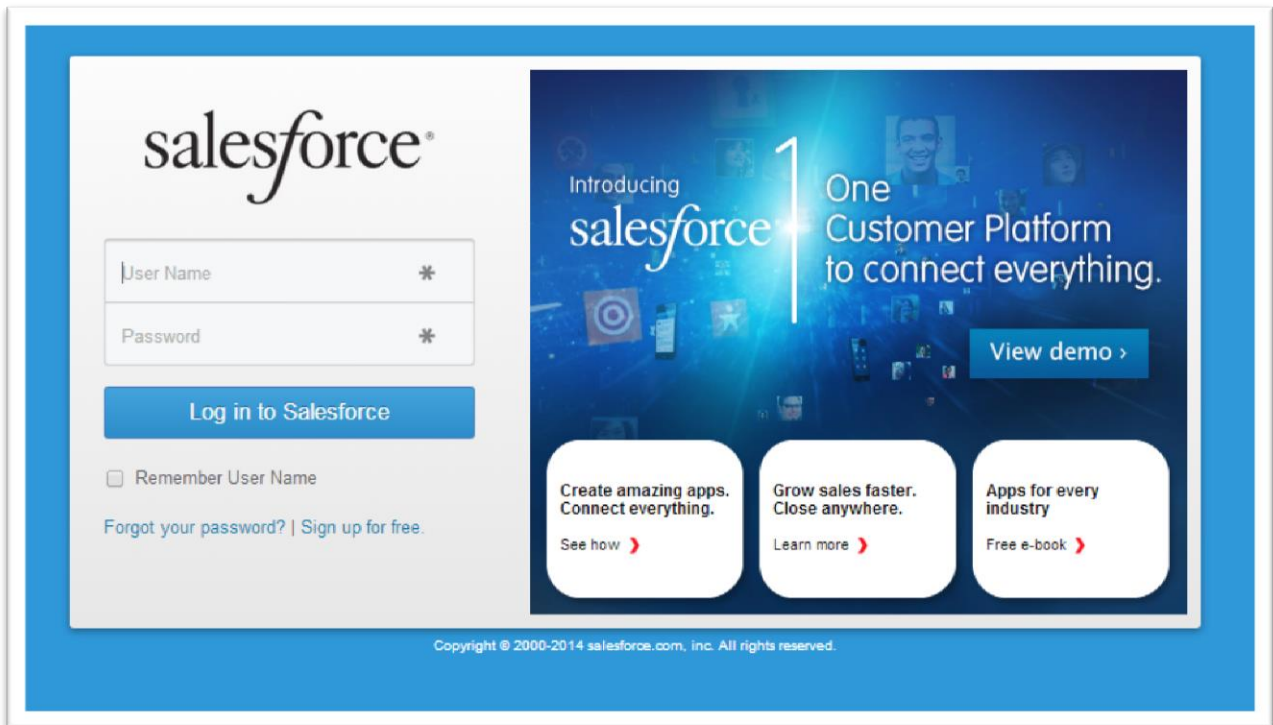
Print It, is available as a free app in AppExchange. This guide will walk you through installing Print It into your Salesforce Org.

1. Click on the “Get IT Now” on the product listing of AppExchange.

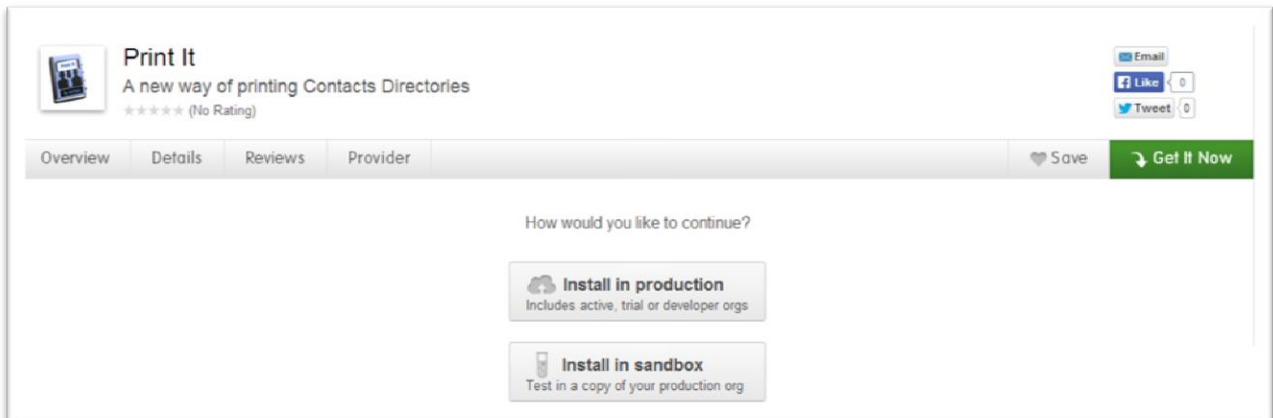


2. Answer the question's asked for installing the App.





3. As per the requirement install the app either in Sandbox or Production.



4. Check the checkbox for Terms and Condition and proceed by clicking on Confirm and Install button.

Overview

Details

Reviews

Provider

Save

Get It Now

Almost there!

Before installing, please review the [customization guide](#) to familiarize yourself with the installation and configuration steps for this application.

WHAT YOU ARE INSTALLING

PACKAGE
Print It

VERSION
Astrea_Directory (Astr_14 / 1.9.0)

SUBSCRIPTION
Free

DURATION
Does Not Expire

NUMBER OF SUBSCRIBERS
Site-wide

WHERE YOU ARE INSTALLING

ORGANIZATION
Astrea

EDITION
Developer Edition

USER NAME
vdk@astreat.com

☐ I have read and agree to the [terms and conditions](#).

[Cancel Install](#) | [Back to previous step](#)

Confirm and Install!

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

5. Enter your credentials again for confirmation.

salesforce®

User Name *

Password *

Log in to Salesforce

☐ Remember User Name

[Forgot your password?](#) | [Sign up for free.](#)

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One Customer Platform to connect everything.

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6. Click on 'Continue' to proceed with the installation.

Home Chatter Campaigns Leads Accounts Contacts Opportunities Forecasts Contracts Cases Solutions Products Reports Dashboards +

Search All Setup... Expand All Collapse All

Force.com Home

Administer

- Manage Users
- Manage Apps
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration

Package Upgrade Details

Help for this Page

Package Name	Astrea_Directory
Version Name	Astr_14
Version Number	1.9
Publisher	astrea
Description	

Installed Version Information

Package Name	Astrea_Directory
Version Name	Astr_14
Version Number	1.9
Description	

Continue Cancel

7. Follow Step 1 to 2.

Step 1. Approve Package API Access Step 1 of 2

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects

This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
News	✓	✓	✓	✓

	Read	Create	Edit	Delete
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Push Topics	✓	✓	✓	✓
Quotes	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

General User Permissions

This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions

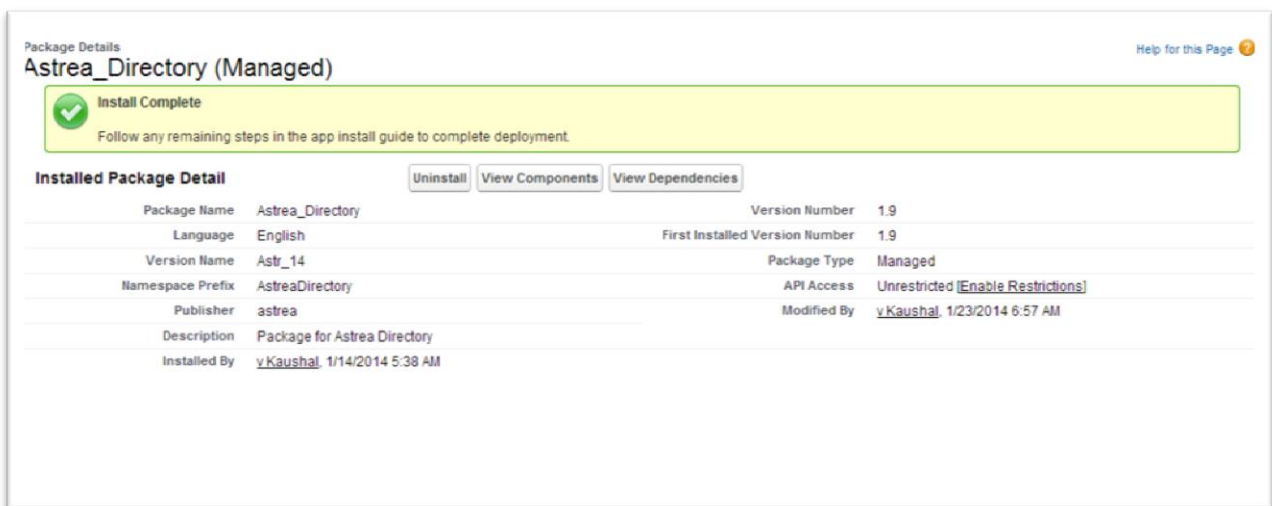
This Package will be able to use all of the Administrative Privileges from the user's Profile.

Next Cancel

8. Click On the 'Install' Button.



9. A Notification will be shown when installation is completed.



The steps so far are similar to installation steps of any app from AppExchange. The next steps are specific to Print It.

Introductory Manual

How to start?

Once the package gets install, the user will have to do some changes to get started. These include adding the components of the apps in your page layouts.

User will add a visualforce component in the contact layout

The Contacts Directory app consists of a visualforce component which has to be added onto the contact page layout. This visualforce page creates a section of Upload a Photo where the image of a contact is uploaded.

1. The first step is to go the contact page layout in the customise section of the Setup Menu on the left side. Followed by contacts and page Layouts.
Setup > Customise > Contacts > Page layouts > Contact Layout

2. By drag and drop add the UploadImage page on the contact page layout and click on save button.



Bin

[Opportunities \(0\)](#) | [Cases \(2\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Campaign History \(0\)](#) | [Notes & Attachments \(0\)](#) | [HTML Email Status \(0\)](#)

Contact Detail

EditDeleteCloneRequest Update

Contact Owner	yk [Change]	Phone	(312) 596-1000
Name	Mr. John Bond	Home Phone	
Account Name	Grand Hotels & Resorts Ltd	Mobile	(312) 596-1563
Title	VP, Facilities	Other Phone	
Department	Facilities	Fax	(312) 596-1500
Birthdate	10/1/1949	Email	bond_john@grandhotels.com
Reports To	[View Org Chart]	Assistant	
Lead Source	External Referral	Asst. Phone	
Mailing Address	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	Other Address	
Languages	English	Level	Primary
Created By	yk 12/12/2013 2:33 AM	Last Modified By	yk 12/18/2013 8:31 PM
Description			

Upload a photo

Choose File

No file chosen

Upload

Note:

FILE MORE THAN 10KB WILL NOT BE UPLOADED

The new Visualforce Component added in the layout

Figure 2: Upload a Photo section created in the layout

Add a tab and four buttons on the Contact list view an

There are few more components needed for setting up this app, a tab and two buttons used for generating the Directory.

To add Buttons: there are two buttons to be added on the list view of the contacts.

1. Click on the Search layout in the Contacts in customise section of the Setup Menu on the left side.

Setup > Customise > Contacts > Search Layouts

2. Go to the Contacts List View search layout

Click on edit next to the Contact List View in the Contact search layouts.

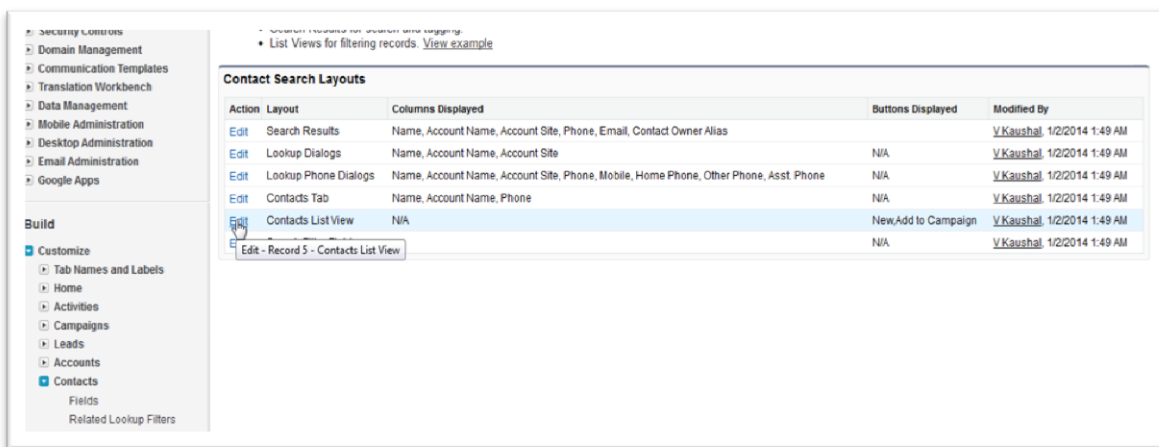


Figure 3 Contact List view

3. Add the Buttons on the List View

After clicking on the edit button you will see a list of available buttons. Select Directory, Directory with Images, Directory selected and Directory selected with Images buttons and click on save.

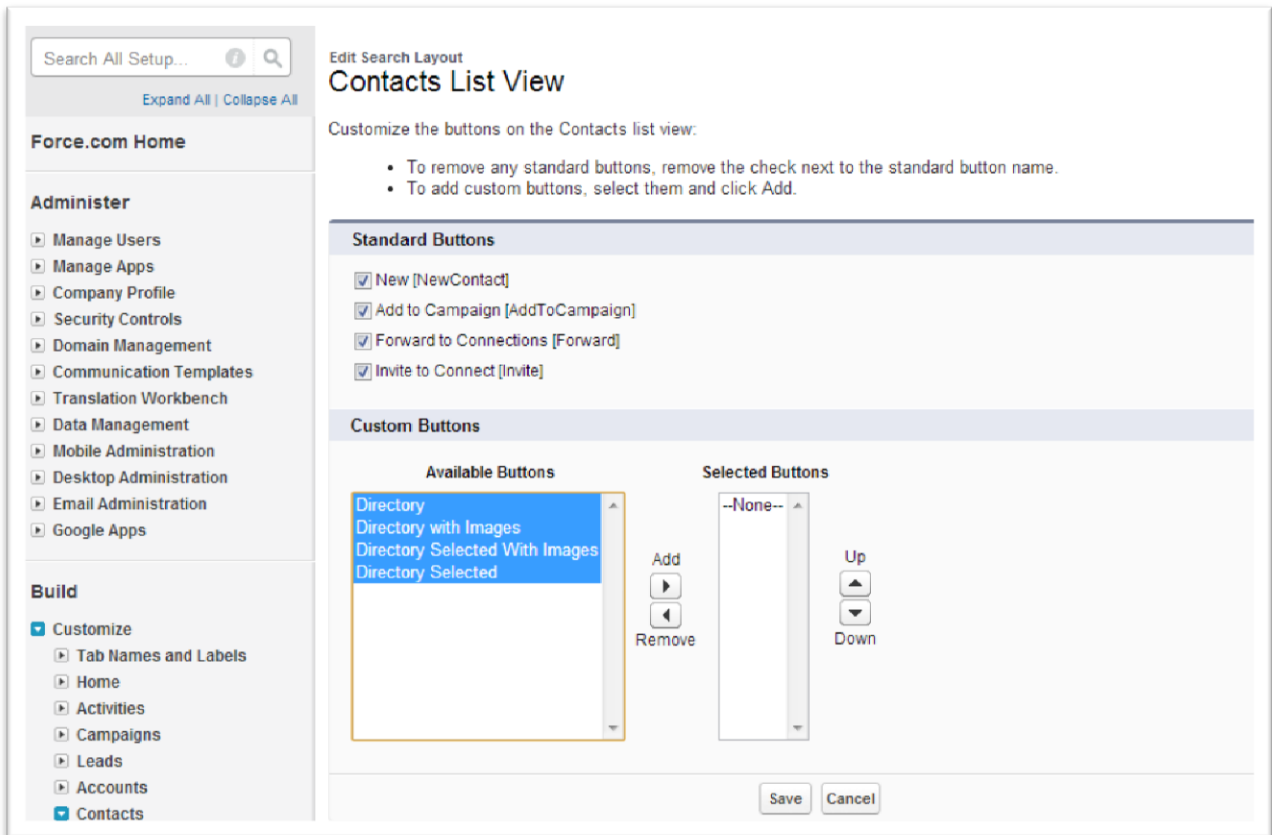


Figure 4: Selection of Buttons in List view

To add a tab: a tab is there in the app component that is used to generate the Directory of all the contacts in the organization.

1. Click on the plus icon in the tabs Menu for getting all the tabs and select Directory

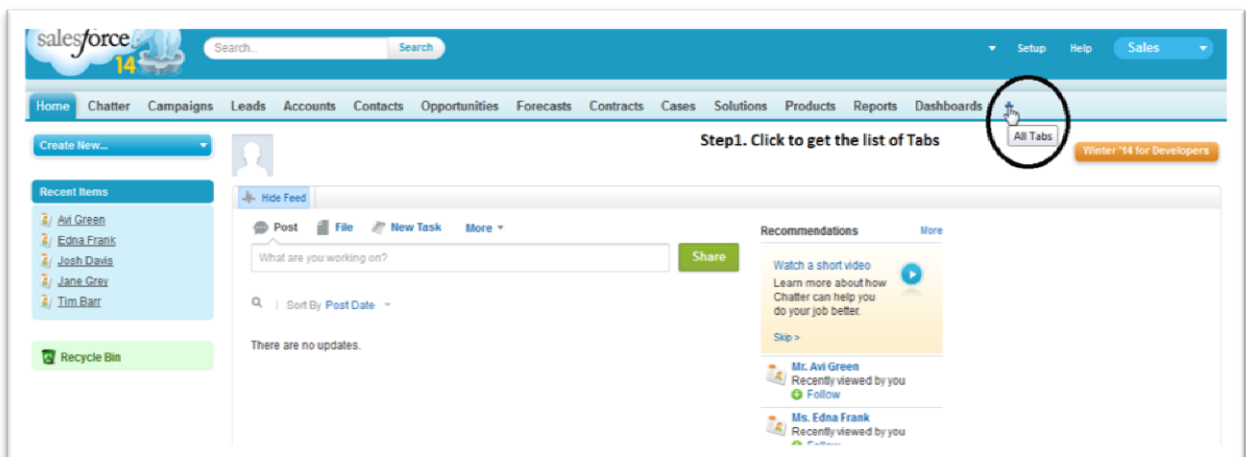


Figure 5: Adding a Directory tab

2. Another way is to set it for the app.

- Click on the Customize my Tabs button (orange button pointed in the fig

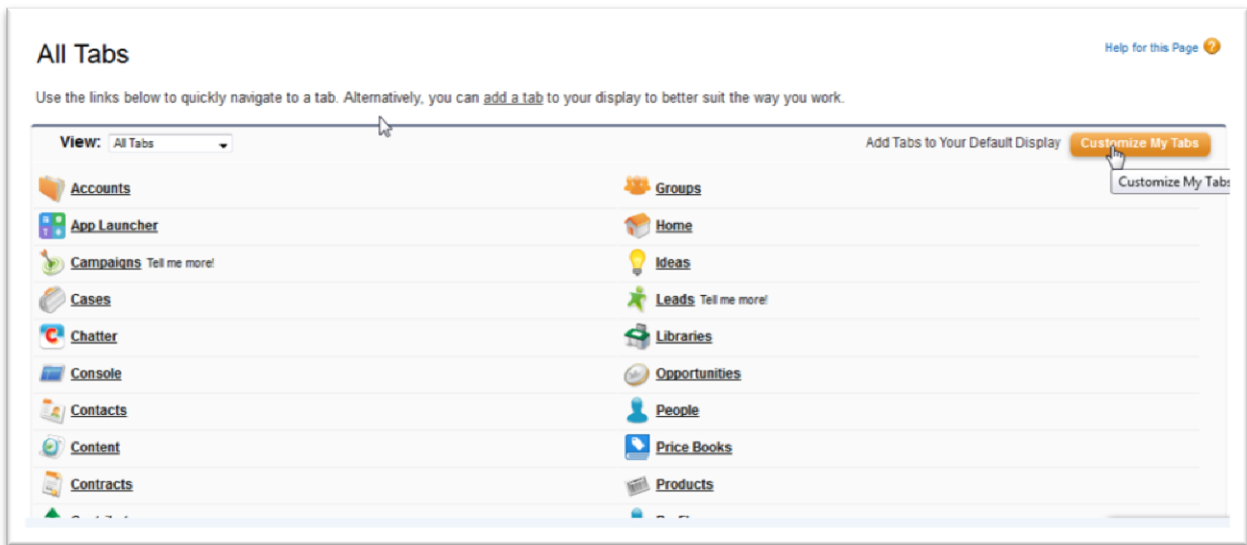


Figure 6: Set a Tab for an App

- Select the App where you like to include the Directory Tab.
- Select the Directory tab from the Available Tab List and Click on Save.

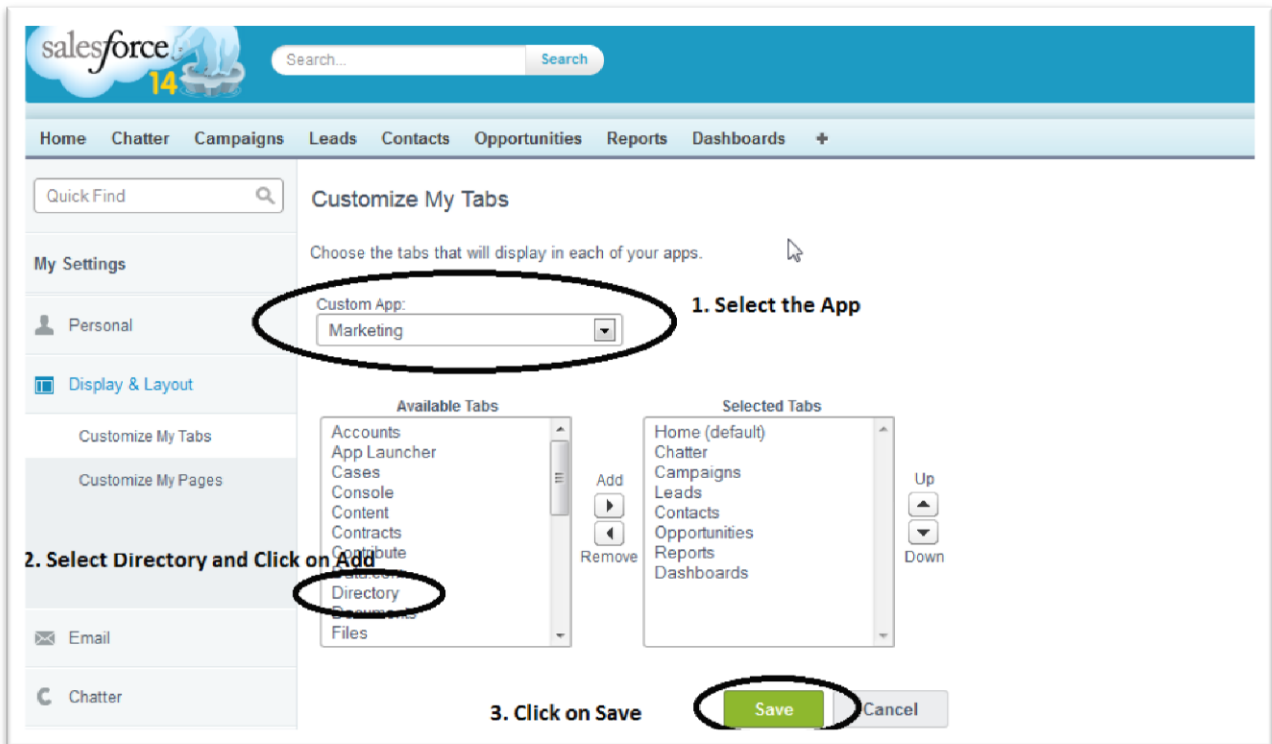


Figure 7: Setting the Directory tab in a app.

Reference Manual (Limits of App)

There are few limits which you may face while using the app and some of them is due to the standard salesforce limit and for others; we are working on the enhancements for the later versions of the app.

- There can be up to ten thousand records in an org that are supported at the moment in this app. Only first ten will be printed and after that a message is displayed saying, 'More than 10000 contacts are not supported'.
- When printing contacts more than 2000 it may take approx. 50 seconds of time.
- When selecting the records in the List view, you cannot select more than 200 records at a time.
- Maximum PDF file size for a Visualforce page rendered as a PDF 60 MB.
- Maximum total size of all images included in a Visualforce page rendered as a PDF 30 MB.