

# **Astrea Smart vCard**

## **User Manual**

A Product By : Astrea IT Services Pvt. Ltd.

## OVERVIEW :-

vCard is a file format standard for electronic business cards and are often attached to email messages, but can be exchanged in other ways, such as on the World Wide Web or instant messaging. They can contain name and address information, phone numbers, Email addresses, URLs, etc. This product is designed for user to export and import v card in a single click. It also supports different file formats.

## FEATURES

The Key features of the product are-

### 1)Account

- **Support single vCard** export in VCF 2.1 and VCF 3.0 format.

### 2)Contact

- Support single vCard export in VCF 2.1 and VCF 3.0 format.
- Import multiple contacts by importing a VCF file.

### 3)Lead

- Support single vCard export in VCF 2.1 and VCF 3.0 format.
- Import multiple contacts by importing a VCF file.

Below are the Astrea Smart vCard Features :

1. Export record as vCard for Contact, Lead and Account:-
  - 1.1. Generate vCard in a single click:-
    - 1.1.1. After package installation put the "Export VCF" button from page Layout to the detail page.
    - 1.1.2. Choose the record on the Object. Click on "Export VCF" button to download the file.
2. How to map custom field Via "Note" object.
3. Importing Vcf to Contact and Lead:-
  - 3.1. Go to the tab provided for **Import**:-
  - 3.2. Press the **Choose File** button on either tab for uploading VCF file. The vcf file can be generated with any email application like gmail or Outlook.
4. Perform Import and Export on Mobile.

## 1. Export record as vCard for Contact, Lead and Account:-

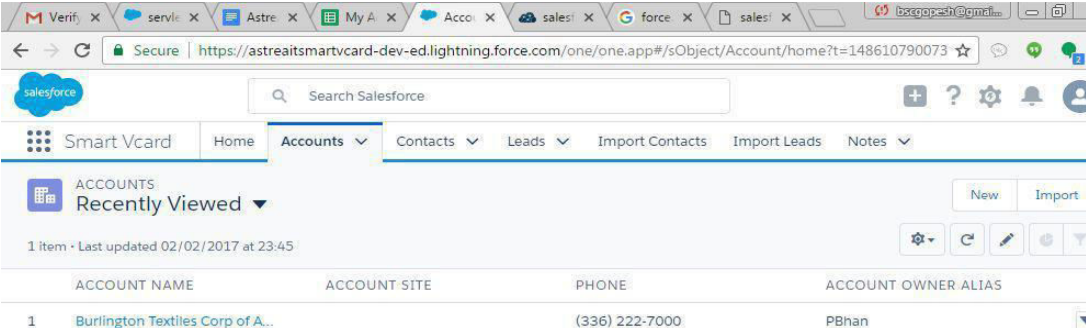
Once all the buttons are placed on their positions then we can use this app in following ways:-

### 1.1. Generate vCard in a single click:-

If you want to generate vCard in a single click and “Export VCF” button is not available in the layout please add the button as per the installation guide, given below.

1.1.1. After package installation put the ”Export VCF” button from page layout to the detail page (here is the example for account object given below):-

- After package installation go to page layout and add as follows:-
  1. Select the particular object.

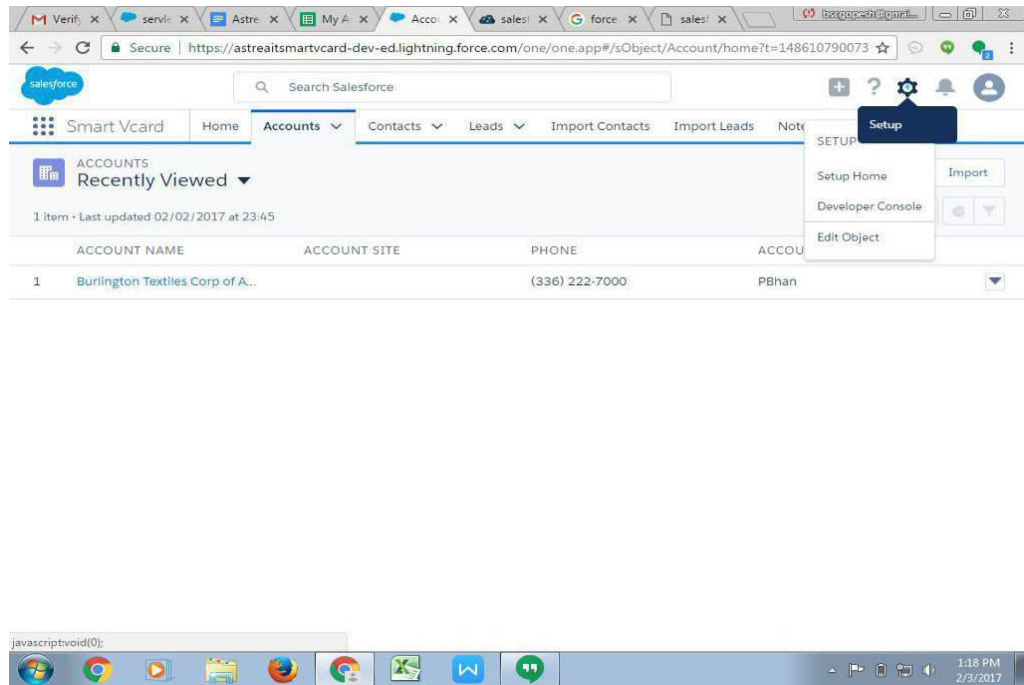


The screenshot shows the Salesforce interface for the Accounts object. The top navigation bar includes the Salesforce logo, a search bar, and several utility icons. Below the navigation bar, there are tabs for "Smart Vcard", "Home", "Accounts", "Contacts", "Leads", "Import Contacts", "Import Leads", and "Notes". The "Accounts" tab is active, and the page displays a list of accounts under the heading "ACCOUNTS Recently Viewed". The list contains one item: "Burlington Textiles Corp of A...". The table has columns for "ACCOUNT NAME", "ACCOUNT SITE", "PHONE", and "ACCOUNT OWNER ALIAS".

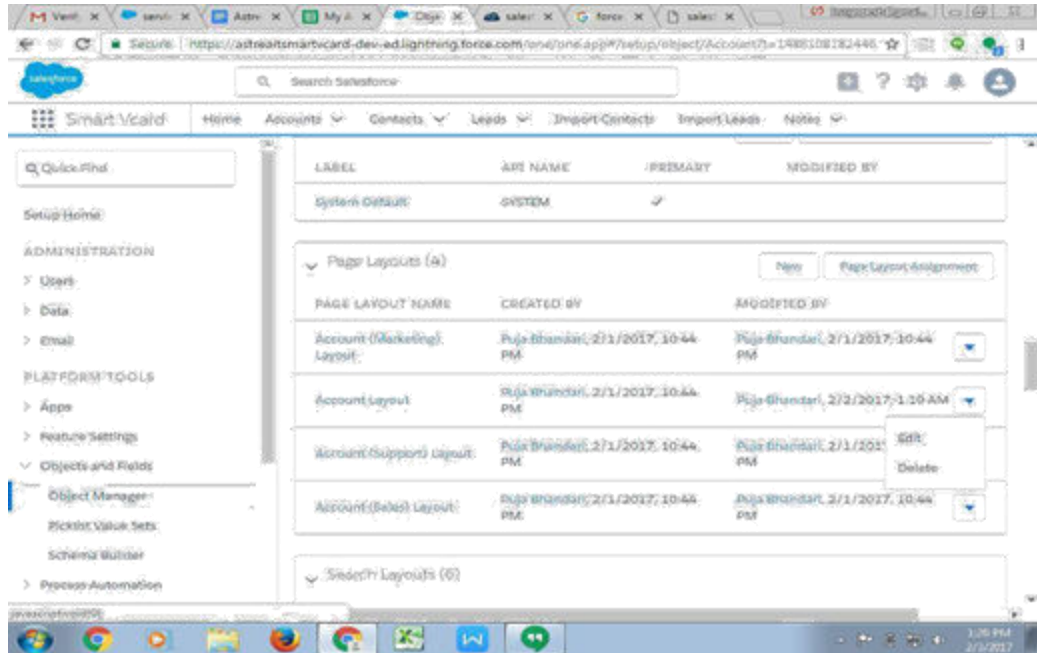
	ACCOUNT NAME	ACCOUNT SITE	PHONE	ACCOUNT OWNER ALIAS
1	Burlington Textiles Corp of A...		(336) 222-7000	PBhan

<https://astreaitsmartvcard-dev-ed.lightning.force.com/one/one.app#/sObject/Account/home>

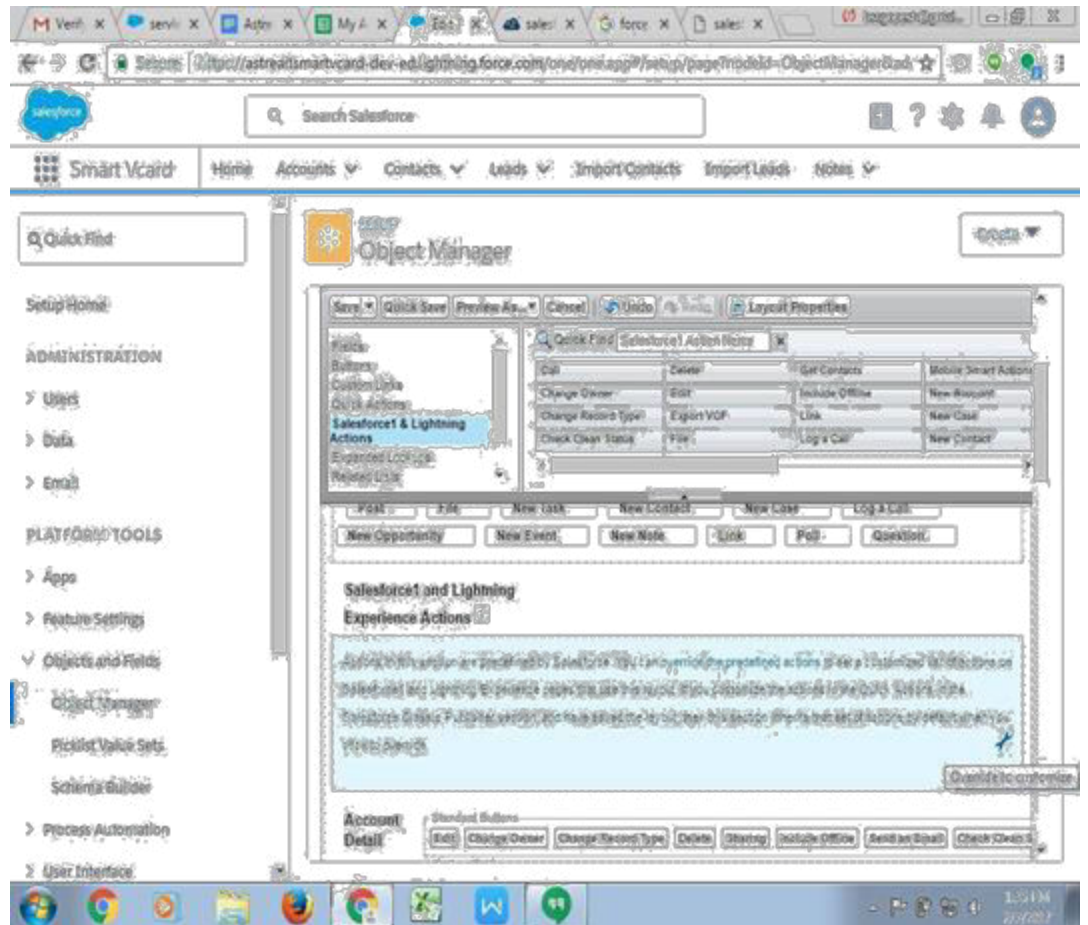
2. Select setup from the header of the page this will show you drop down menu.



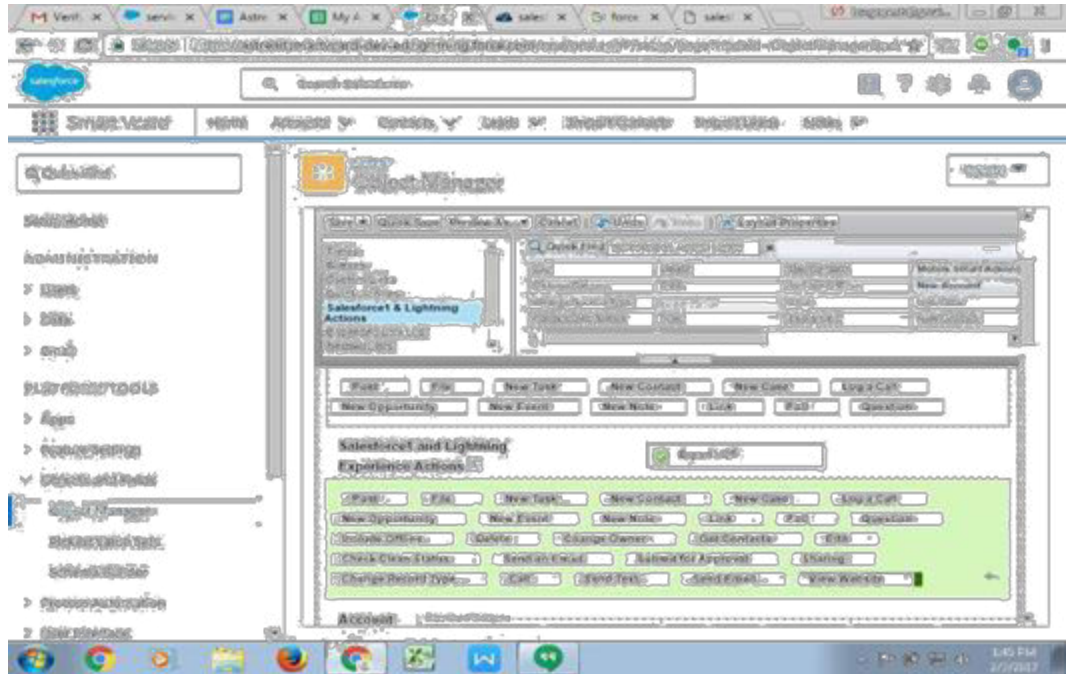
3. Select 'Edit Object' in that menu then find out page layout option after scroll down in the next screen.



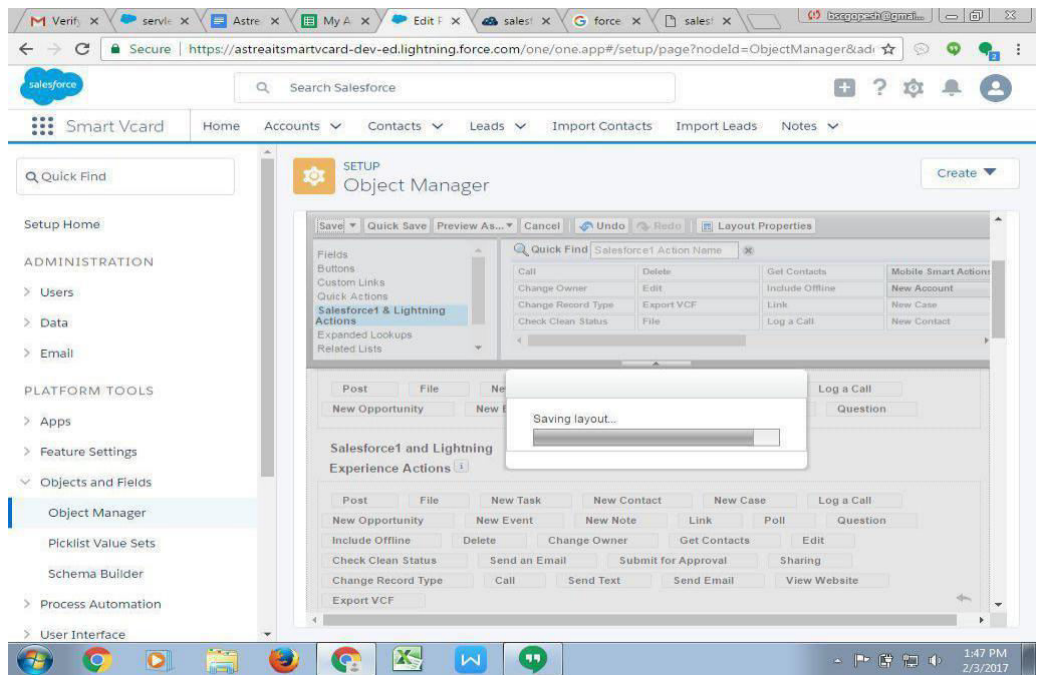
4. Select an appropriate layout then click on 'Edit' after selecting then drop down menu from right of that layout option.
5. In the next screen choose 'Salesforce1 & lightning Actions' from the palette, also select 'override to customize' option from bottom right corner of preview pane.



6. Select 'Export VCF' button from the palette and drop it down to the preview pane.

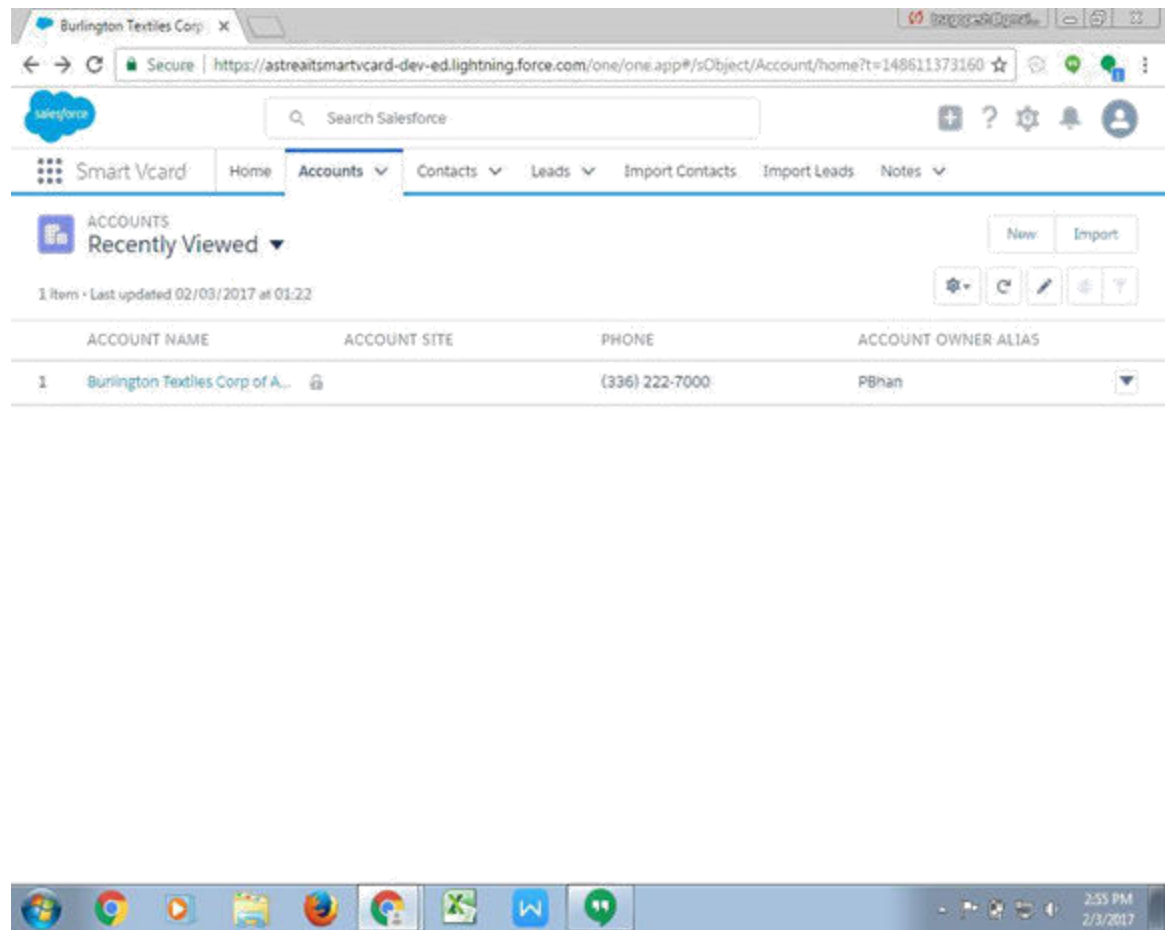


7. After this click on the save button on top-left of the palette.

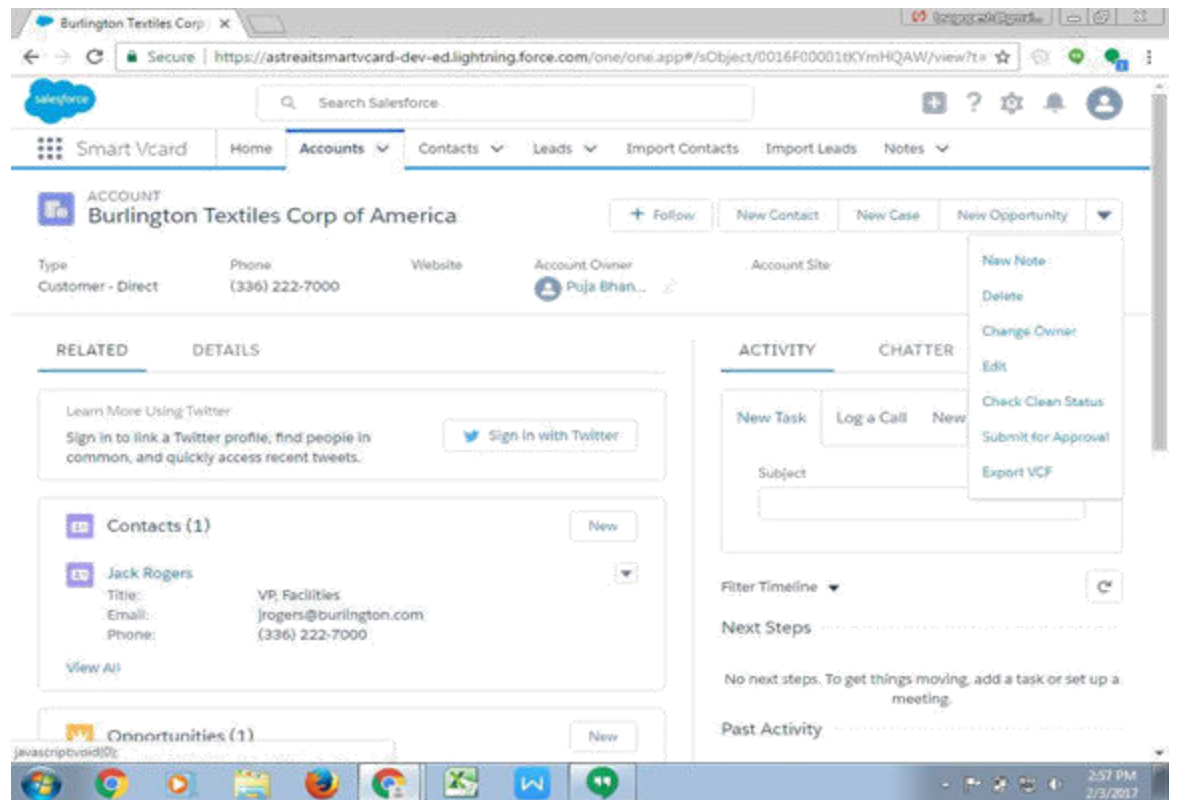


### 1.1.2. Choose the record on the Object:-

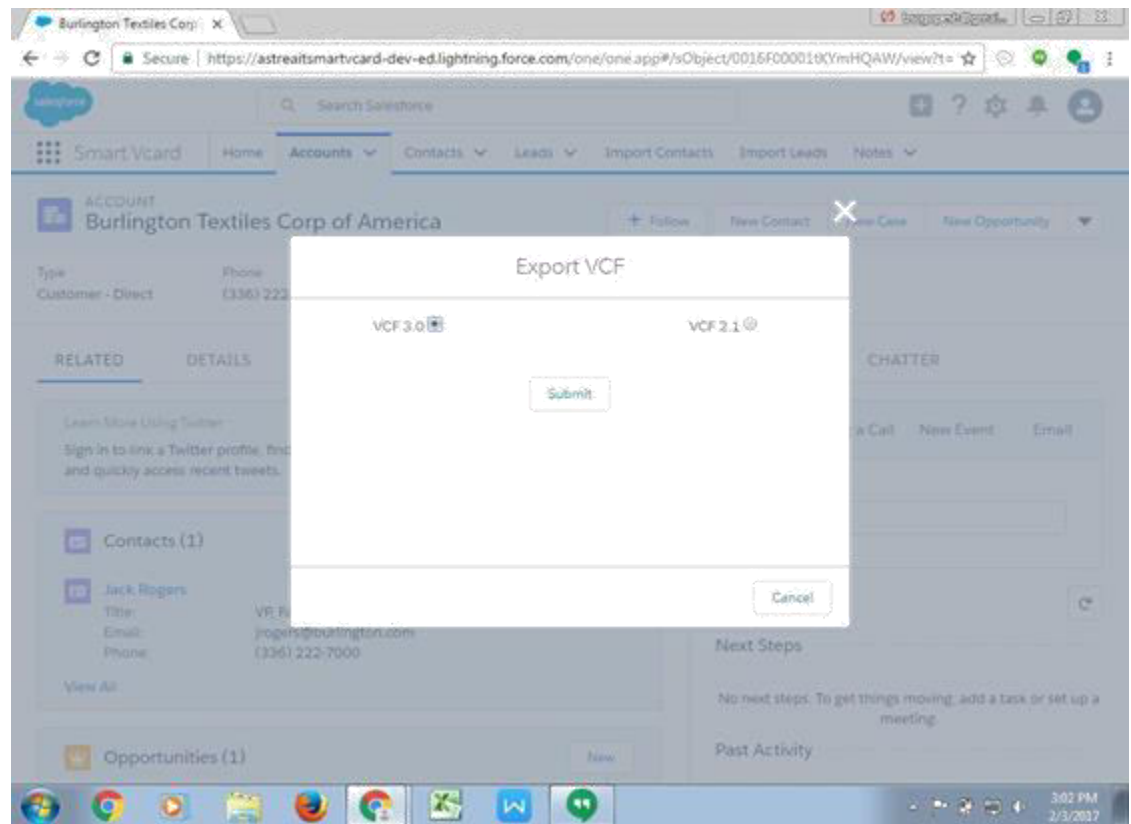
- Choose the record on the object i.e Account, Contact and Lead.



- Find out the “Export VCF” button from the top right corner of the detail page. If button is not there please add that button from page layout as per the instruction given in 1.1.1.



- After click on the 'Export VCF' button choose the version of vcf that you going to export.



- Smart vCard support two formats:-
  - a) VCF 2.1
  - b) VCF 3.0
  
- After choosing the version next screen will contain the value of fields of the object and some custom fields of “Note” object.

Burlington Textiles Corp of America

Search Salesforce

Smart Vcard Home Accounts Contacts Leads Import Contacts Import Leads Notes

ACCOUNT  
Burlington Textiles Corp of America

Type: Customer - Direct Phone: (336) 222-7000

Export VCF

Download Back

```
BEGINVCARD
VERSION:3.0
FN:CHARSET=UTF-8:Burlington Textiles Corp of America
ORG:CHARSET=UTF-8:Burlington Textiles Corp of America
TELTYPE=WORKVOICE:(336) 222-7000
TELTYPE=WORKFAX:(336) 222-8000
ADRTYPE=WORK:525 S. Lexington Ave, Burlington, NC, 27215, USA
LABELTYPE=WORK:525 S. Lexington Ave, Burlington, NC, 27215, USA
ADRTYPE=HOME:
LABELTYPE=HOME:
```

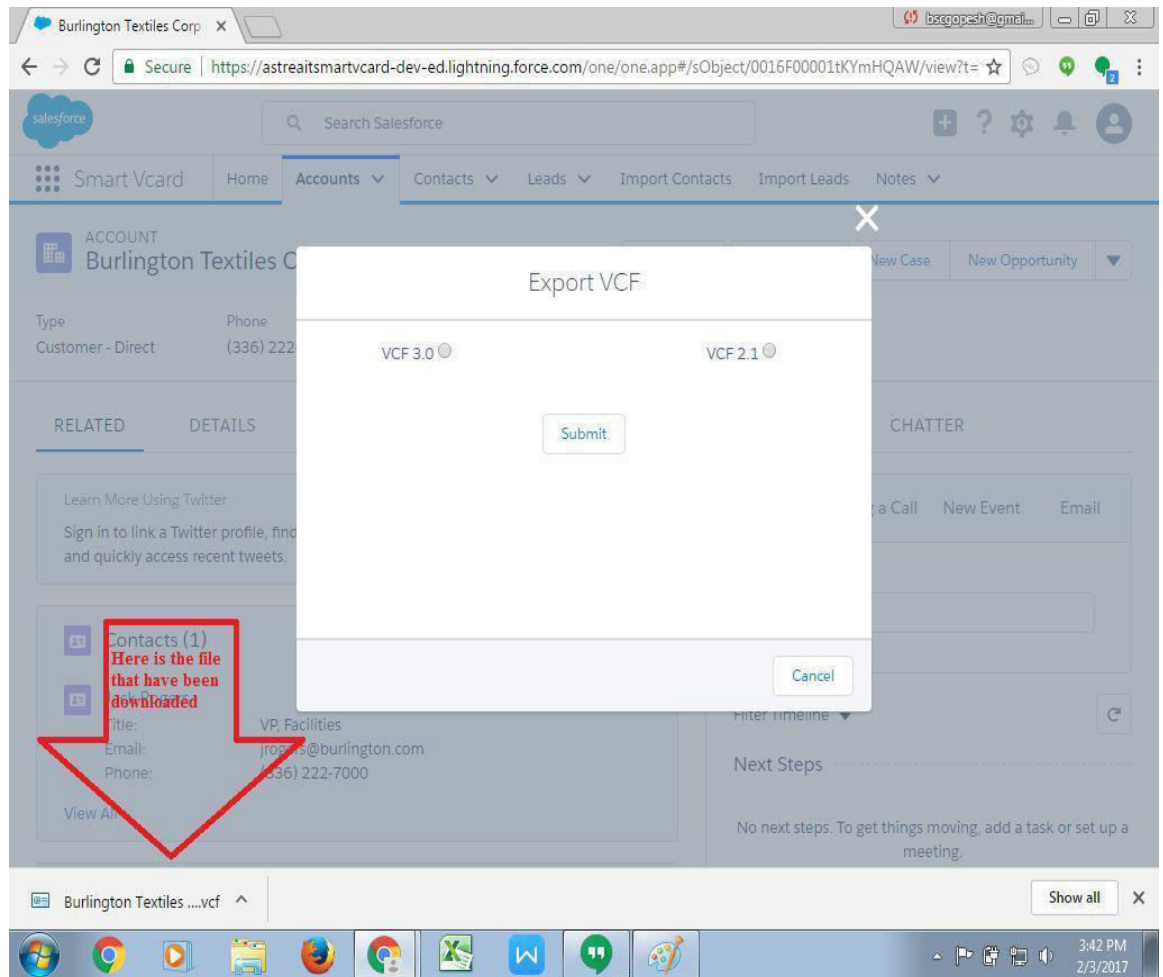
CHATTER

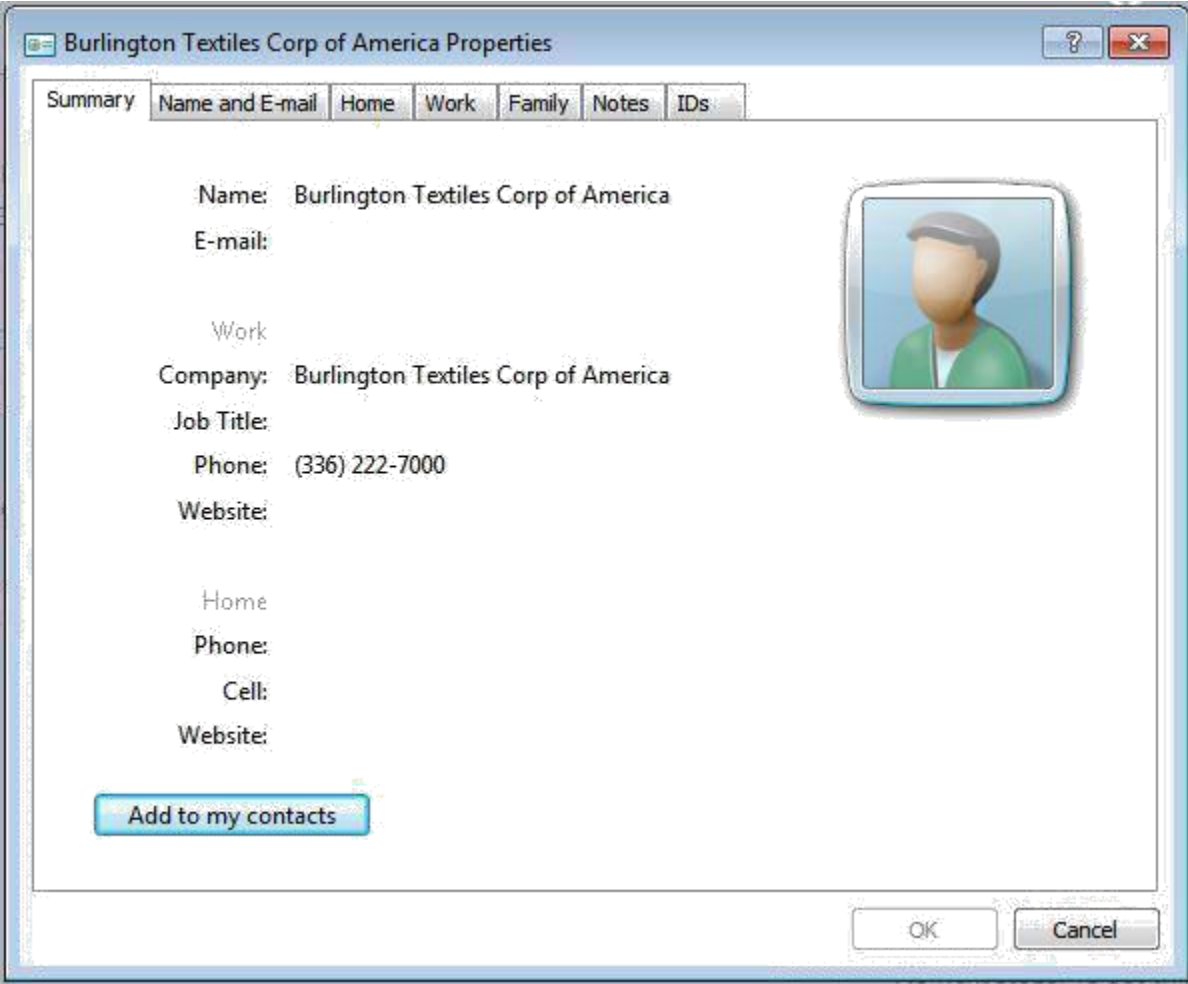
Next Steps

Past Activity

3:55 PM 11/17/2017

- Click on “Download” button to download the file.



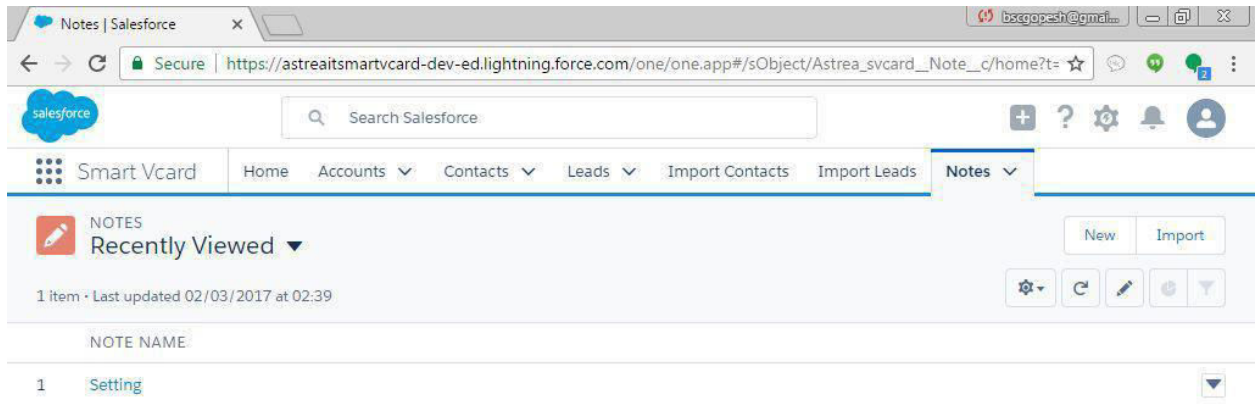


Downloaded vcf for Account

## 2. How to map custom field Via “Note” object:-

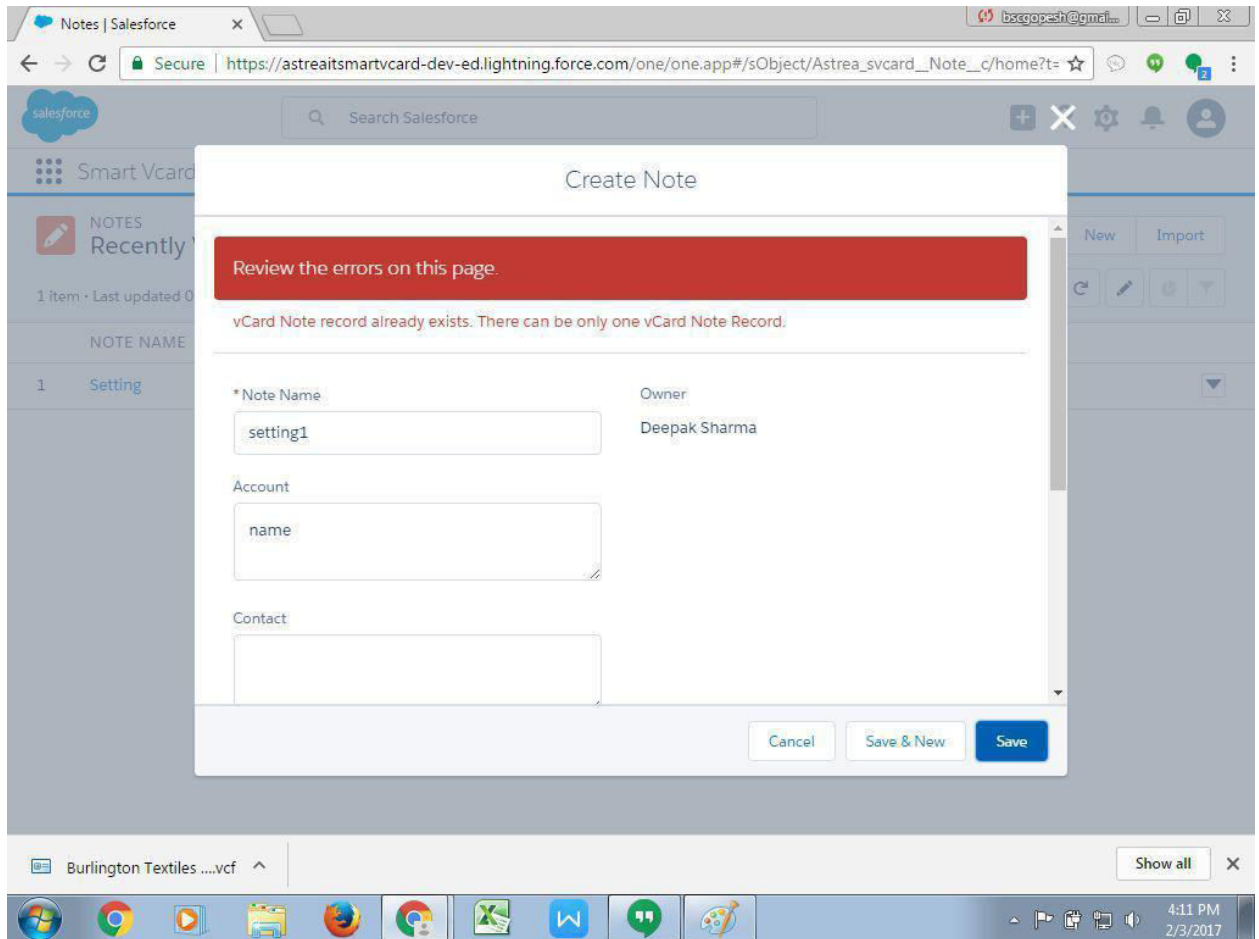
If there is the requirement to map custom fields then we can do so with the custom object i.e “Note”. All field values must be comma separated. The steps are given as follows:-

1. Choose the “Note” object after clicking on Notes tab.



Note:-

- Always remember there can be only one record exist inside Note object. If you will try to create the another one then it will throw an error.



- there is another restriction that you must enter the correct field name inside Account, Contact and Lead field in Note object. I.e whatever field name you put in note object then that must be the valid value for the object correspond to the record that is going to export.
- Example :- In above screenshot we used the name field of account i.e a valid value for account object otherwise it will show you an error given in below screenshot.

Setting | Salesforce x [Browser Tabs]

Secure | https://astreaitsmartvcard-dev-ed.lightning.force.com/one/one.app#/sObject/a006F00002eWPaMQAW/view?i...

Search Salesforce

Smart Vcard | Home | Accounts | Contacts | Leads | Import Contacts | Import Leads | Notes

### Setting

New Contact | Edit | New Opportunity

\* Note Name: Setting | Owner: Puja Bhandari

Account: asd

Contact: [Empty Field]

Lead: [Empty Field]

**Review the following errors**

- The specified field is not a valid field in the Account Object

Cancel | Save

Modified By: Puja Bhandari, 2/2/2017 4:26 AM

Burlington Textiles ...vcf | Show all

4:20 PM 2/3/2017

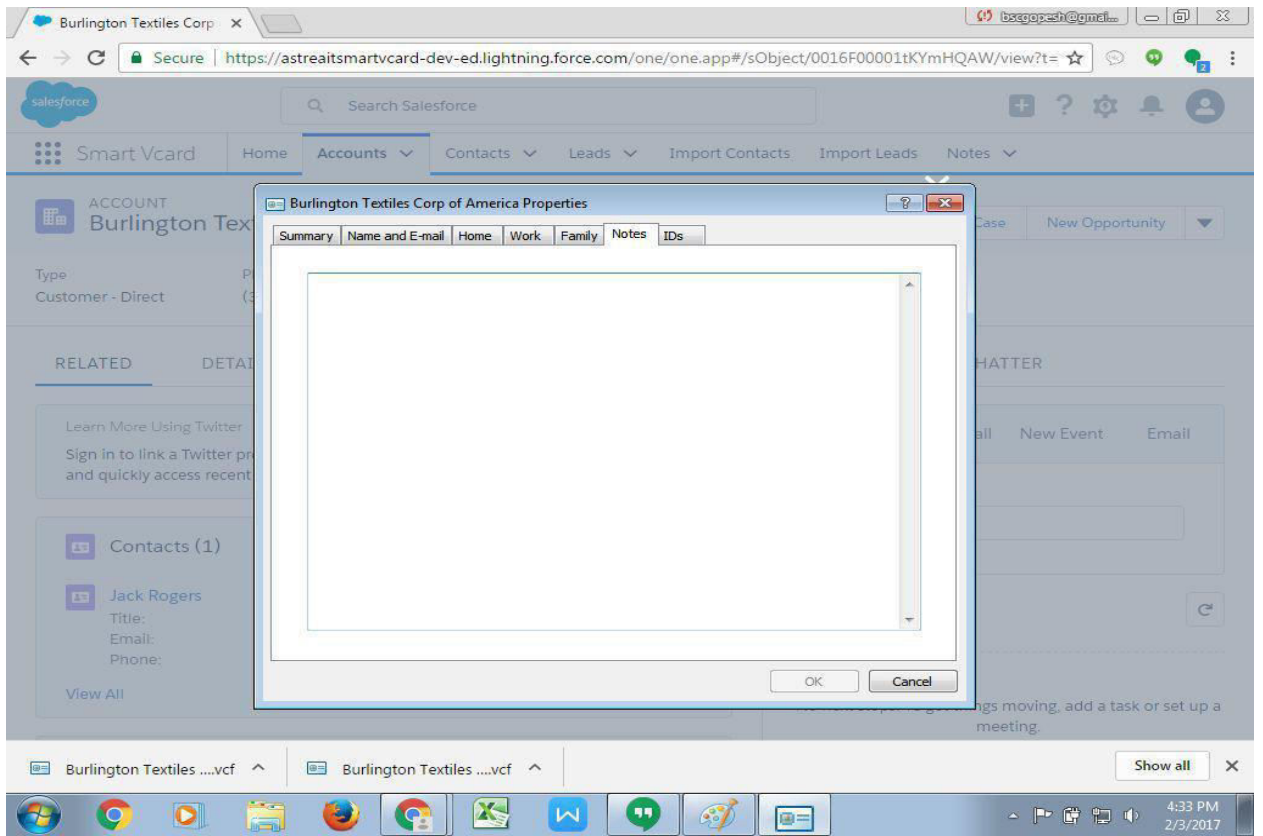
- In another case if you do not want to customize any field then leave that field blank that is correspond to that object record that is going to export. In that case it will show you no value at the time of export.

The screenshot shows a Salesforce interface for 'Burlington Textiles Corp'. An 'Export VCF' dialog box is open, displaying the following VCF text:

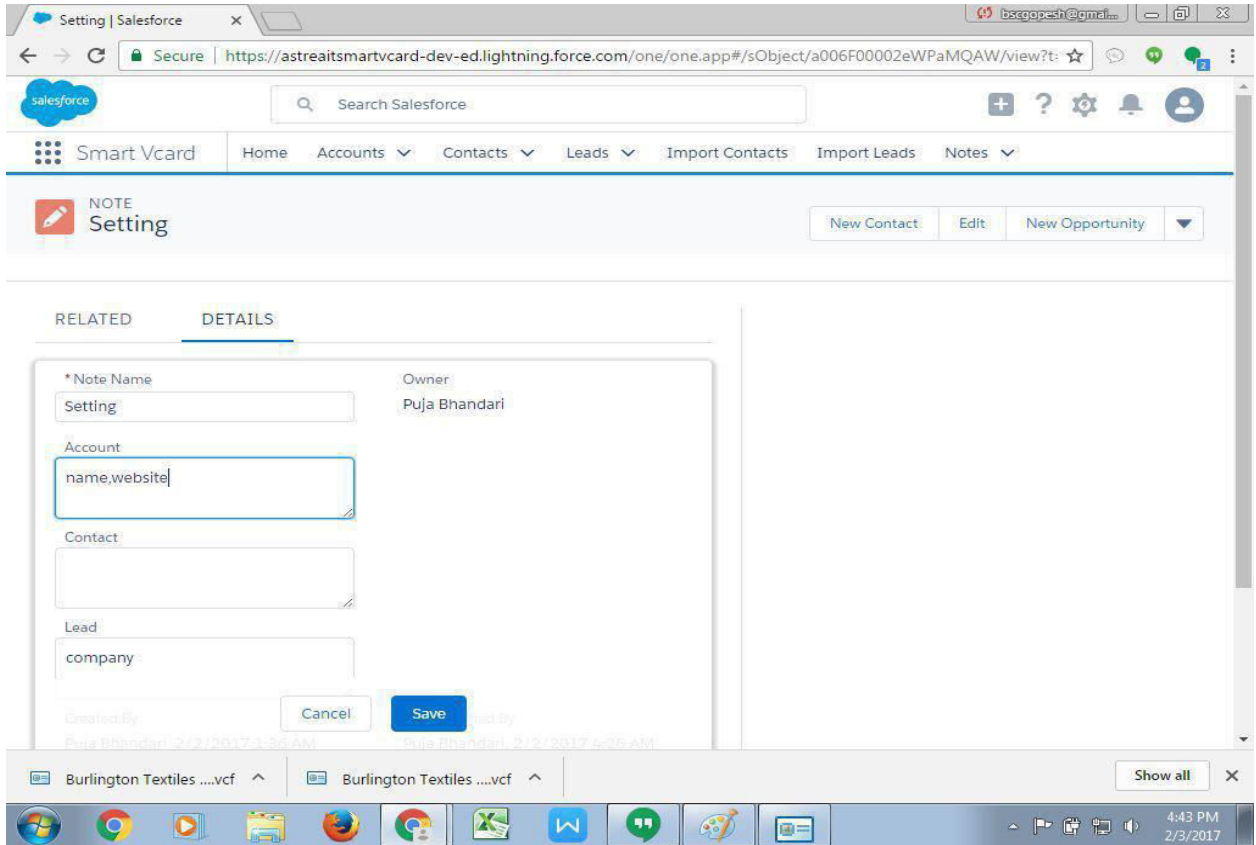
```
TEL;TYPE=WORK;FAX:(336) 222-8000
ADR;TYPE=WORK;;;525 S. Lexington Ave;Burlington,NC;27215;USA
LABEL;TYPE=WORK;525 S. Lexington AveBurlingtonNC27215USA
ADR;TYPE=HOME;;;
LABEL;TYPE=HOME:
EMAIL;PREF;INTERNET:
URL;WORK:
NOTE:
REV:20080424T195243Z
END:VCARD
```

A red arrow points to the 'NOTE:' field, which is empty. A text box next to the arrow contains the text: "here is no value present since we choose nothing in note object." The dialog box has 'Download', 'Back', and 'Cancel' buttons.

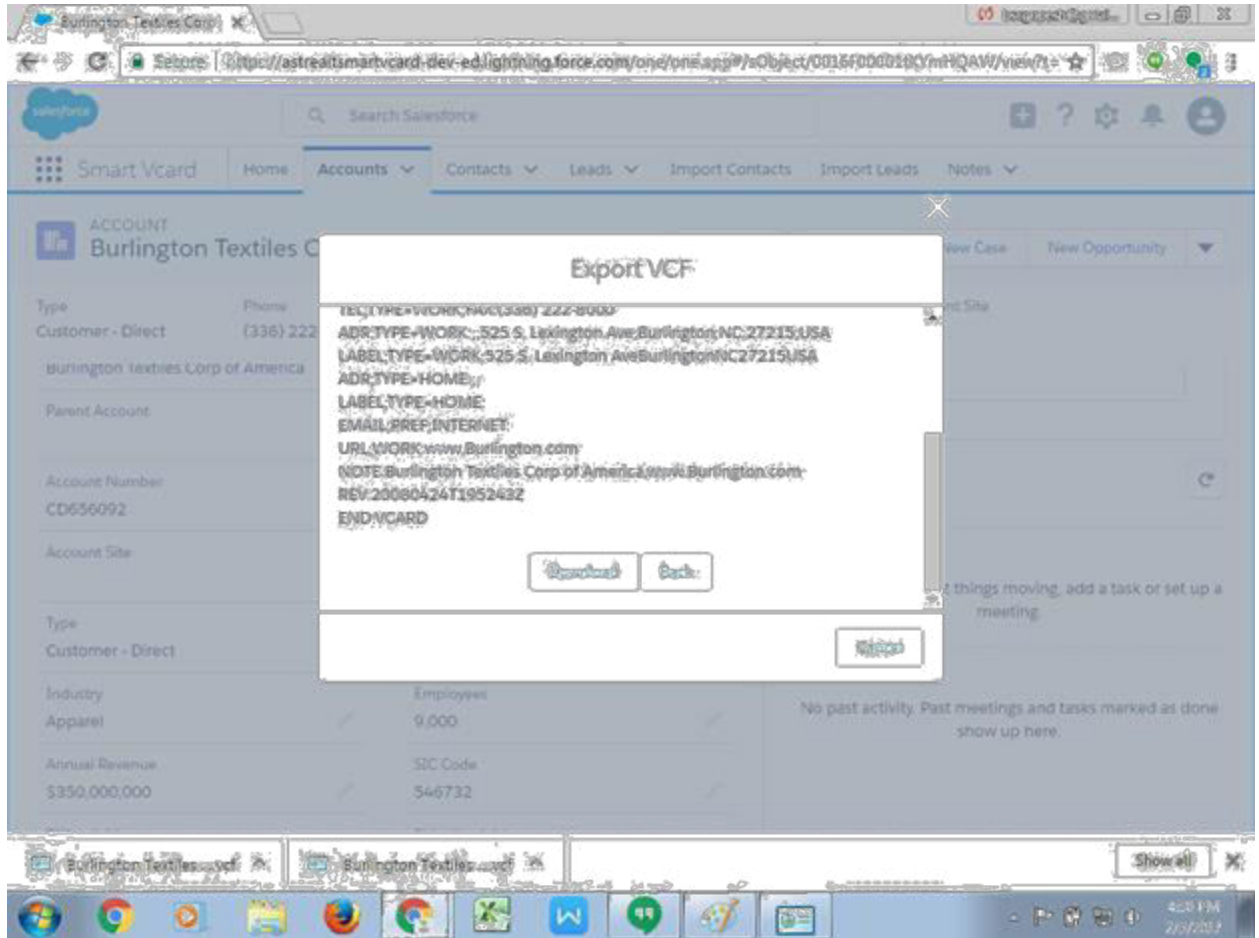
- After downloading, vCard will have no value for Notes .



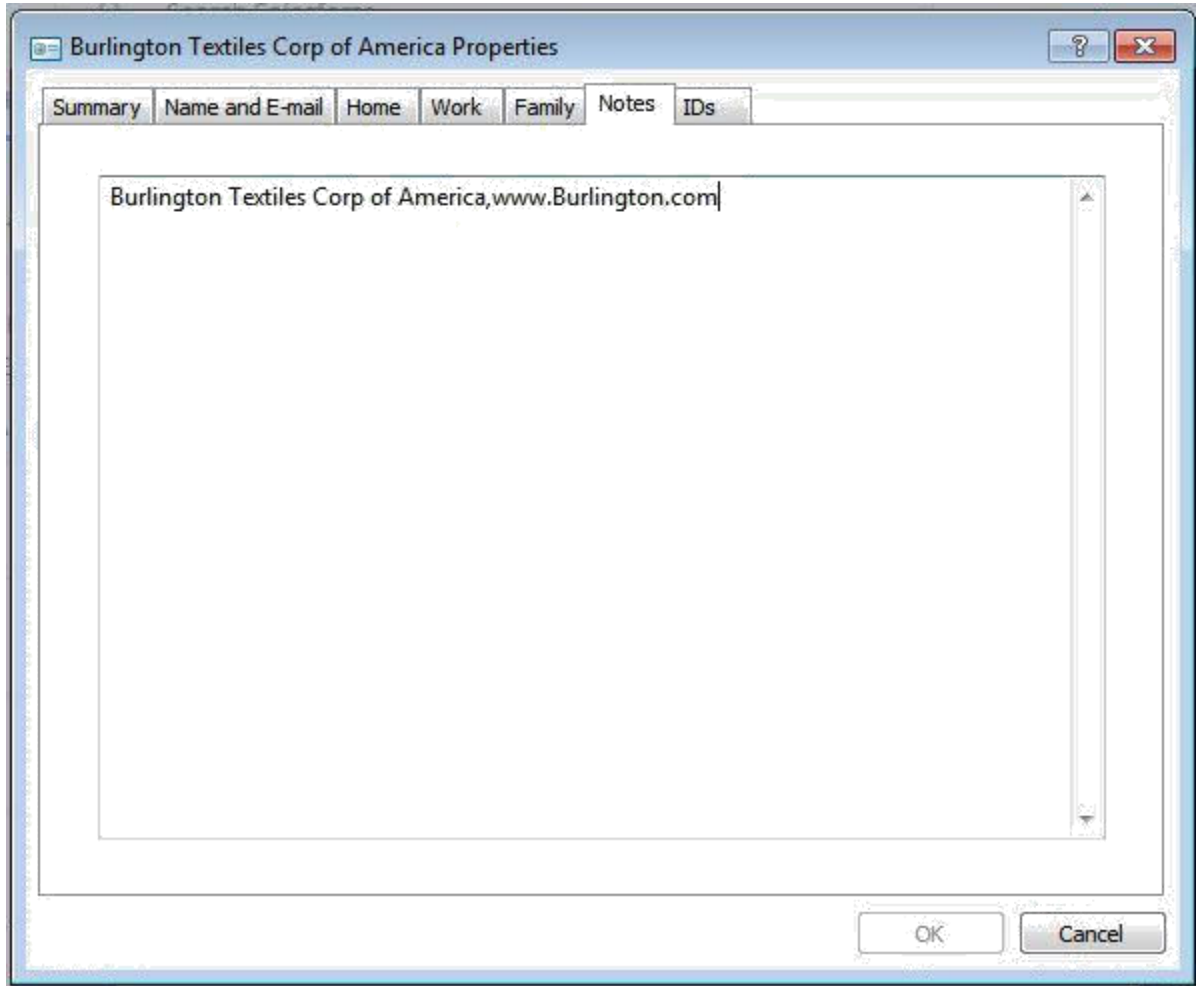
- If there are some field value exist inside Note object then it will be showing in mapping values and vCard too.



Here we have entered two value for account i.e name, website in Note object



In above screenshot values correspond to name, website are shown in front of NOTE:



Sample of vCard containing account name and website

### 3.Importing Vcf to Contact and Lead:-

- Note:-**
- 1.Before inserting any VCF record in salesforce you should keep in mind that your generated vcf must contain all mandatory field value of an object. E.g. “Last Name” field in contact record or “Company” field in Lead record.
  2. The Vcf file can be generated with the help of an email application like gmail or outlook.
  3. A vcf file can contain more than one record.

#### 3.1. Go to the tab provided for import:-

- **Import Contact** tab for importing Contact record. **Import Lead** tab for importing Lead record. (here for understanding we take an example of Import contact)

Lightning Experience | Search | bsegopesh@gmail...

Secure | <https://astreaitsmartvcard-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZlYiOiJvbmU6YXVvYU...>

Search Salesforce

Smart Vcard | Home | Accounts | Contacts | Leads | Import Contacts | Import Leads | Notes

Import vCards  
**IMPORT CONTACTS**

Importing contact from VCF file

**Steps for importing a VCF file**

1. Click on “**Choose File**” button to Browse VCF file. The format of the file should be VCF. The name of the VCF file will be displayed on the screen. There may be more than one VCF records in this file.
2. After this Click on this “**IMPORT CONTACTS**” button to import contacts.

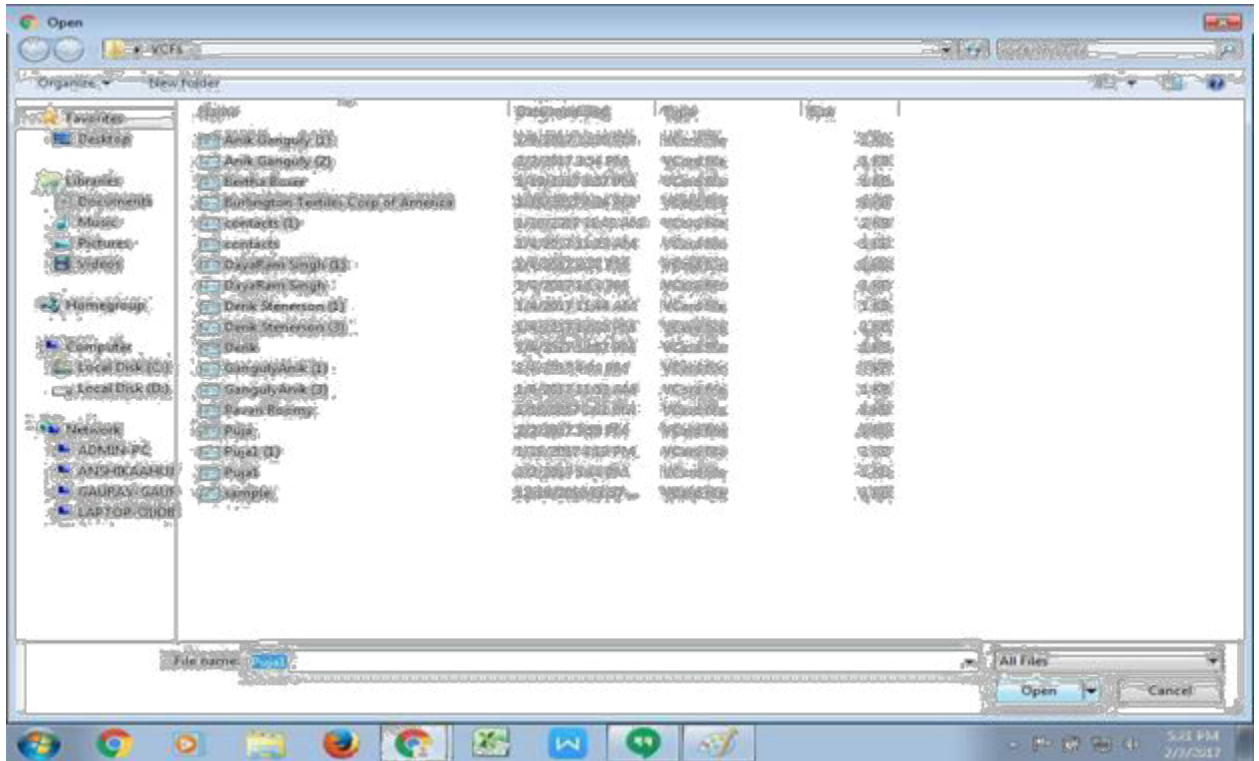
Choose File | No file chosen

IMPORT CONTACTS

<https://astreaitsmartvcard-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZlYiOiJvbmU6YXVvYU...>

5:18 PM  
2/3/2017

- Now click on “Choose File” button for importing vcf file.



- After Choosing particular vcf file click on Import button (Import contact in case of contact).

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Secure | https://astreaitsmartvcard-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZSWYiOiJvbmU6YXVvYyYU... | Search Salesforce

Smart Vcard | Home | Accounts | Contacts | Leads | Import Contacts | Import Leads | Notes

### Import vCards IMPORT CONTACTS

Importing contact from VCF file

**Steps for importing a VCF**

1. Click on "Choose File" button to select a VCF file. There may be more than one VCF file.
2. After this Click on this "IMPORT CONTACTS" button.

**Success/Failure Message**

1 Contact have successfully inserted and 0 Contact have failed

OK

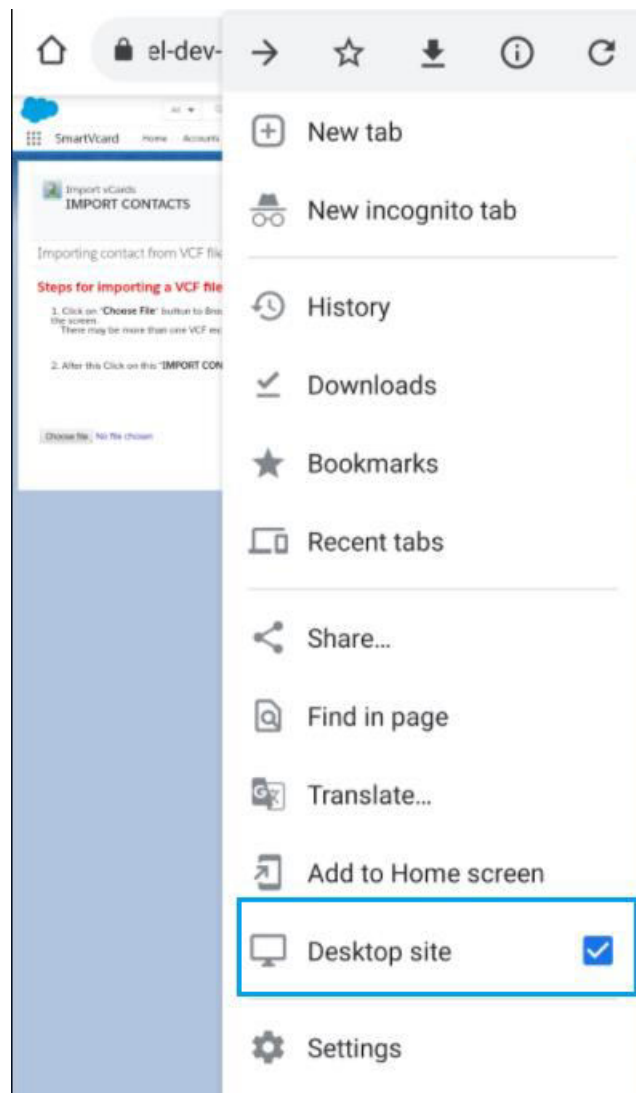
Choose File Puja1.vcf

IMPORT CONTACTS

#### 4. Perform Import and Export on Salesforce1:-

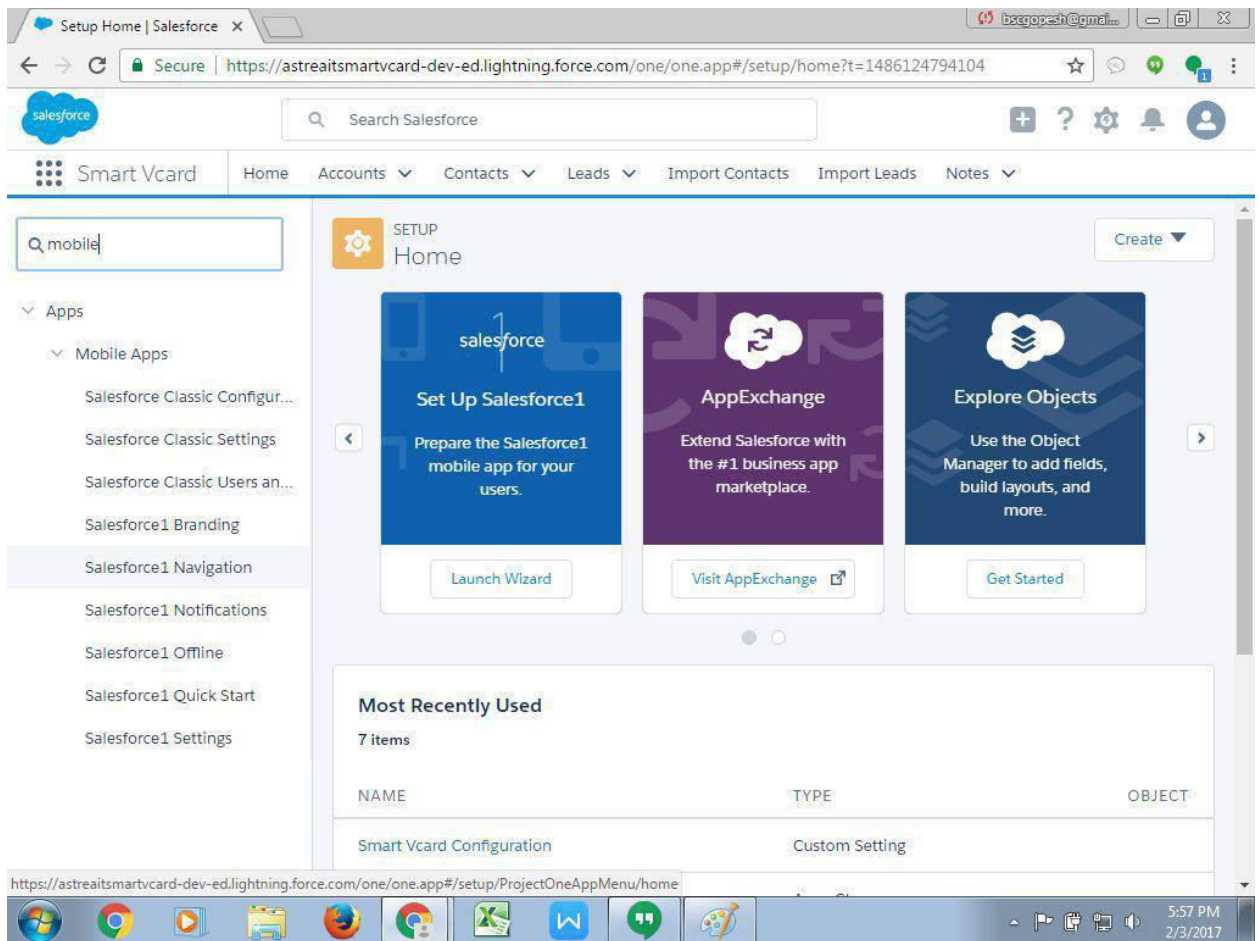
The lightning version of vCard can also be experienced on mobile devices either with the salesforce1 platform or with mobile browser after the package installation.

**Note:** To use vCard application it is preferred to use mobile browser rather salesforce1 app since it have certain limitations. For this you can directly go to browser and login with url as we usually do on desktop but after successful login you have to check the '**Desktop site**' checkbox on mobile browser as below :

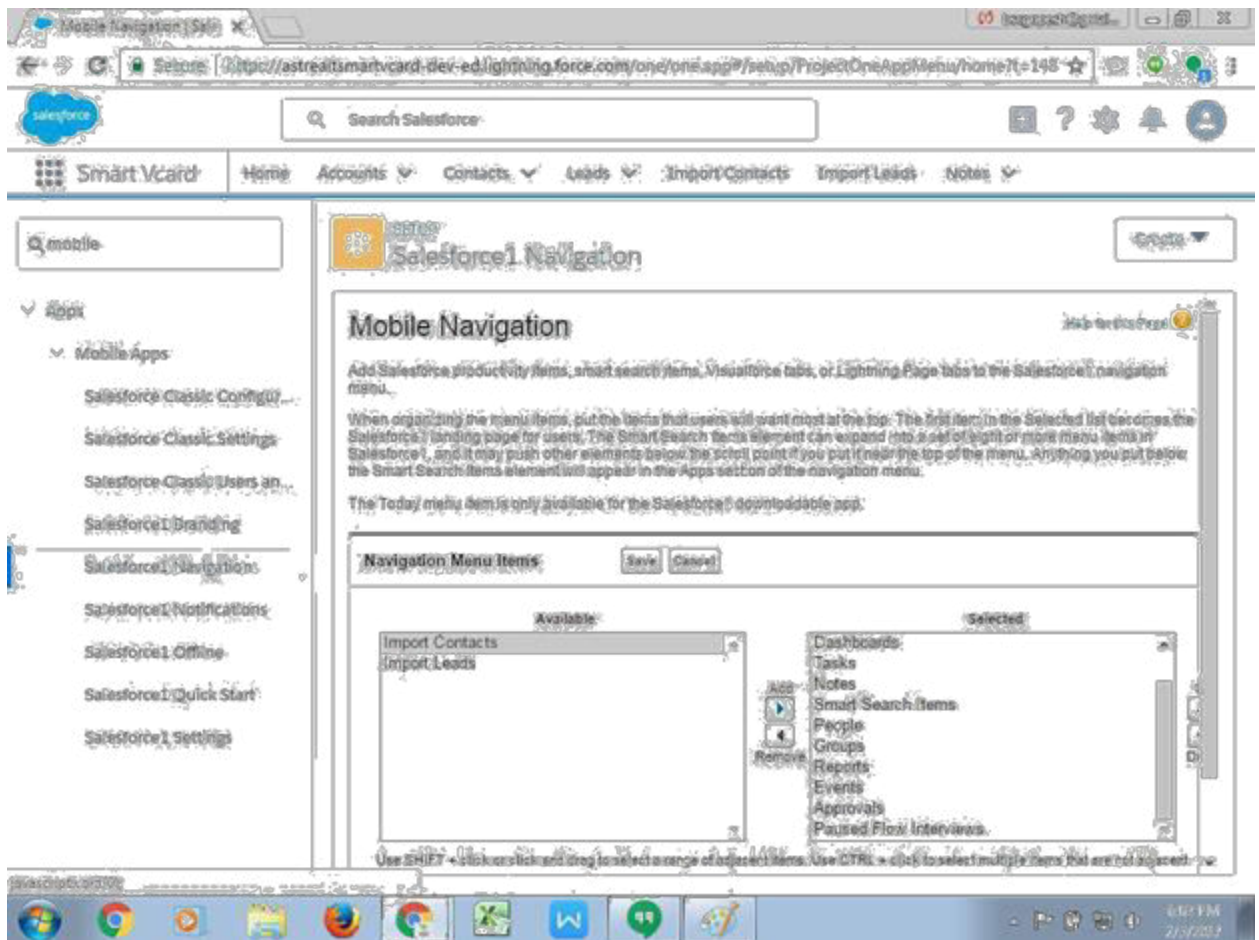


For using the app on Salesforce1 app we need to follow some steps to add buttons and tabs as below.

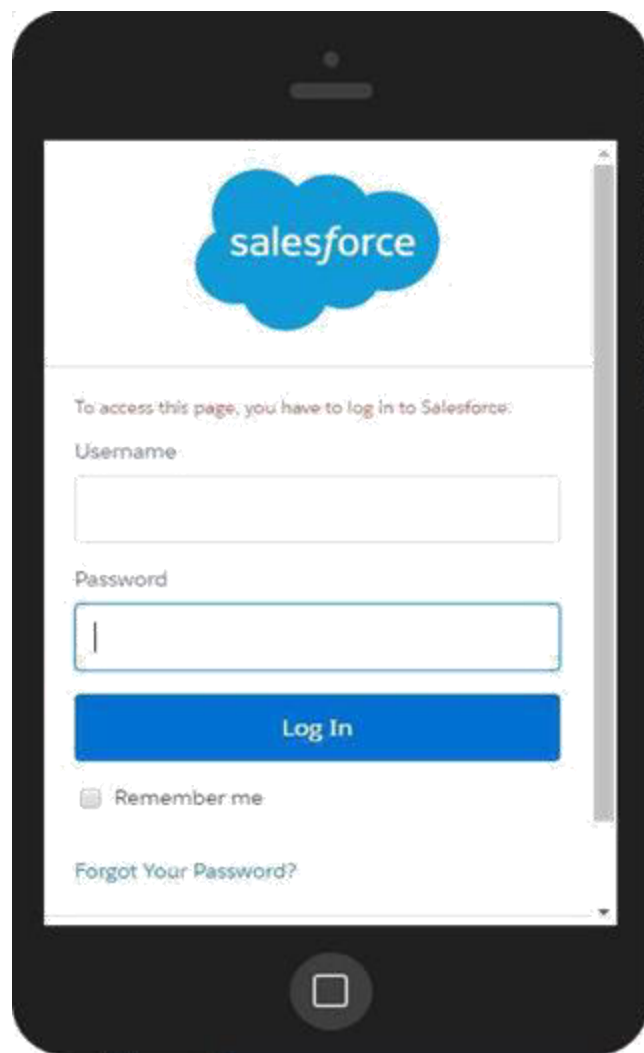
- First go to 'Setup' and choose 'Setup Home' and type 'mobile' in quick find box then select Salesforce1 navigation.



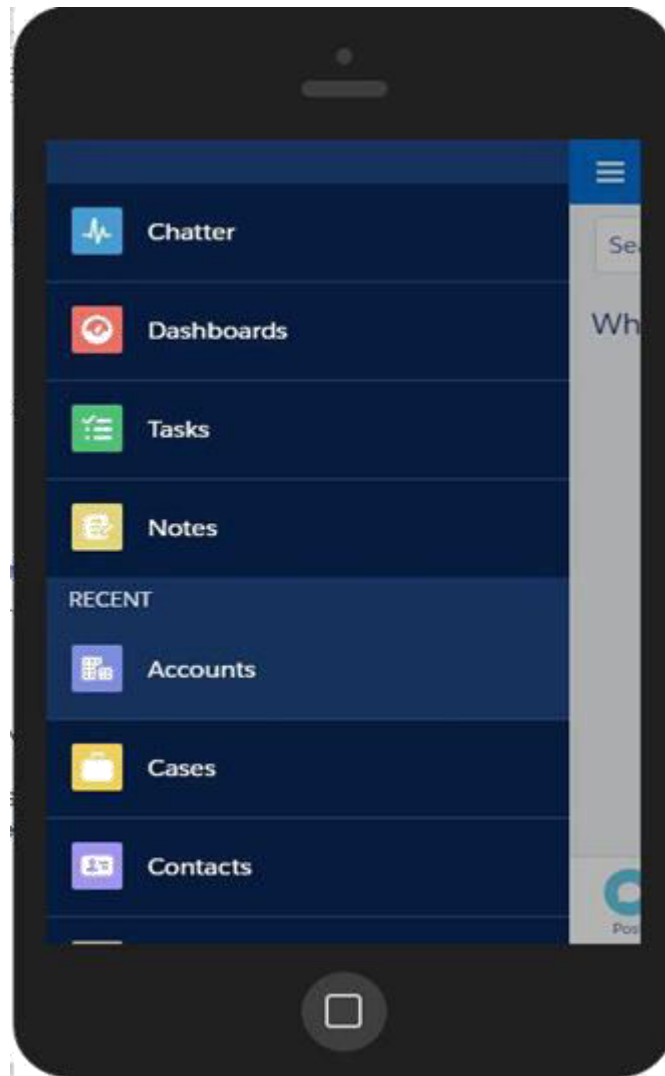
- After that choose both 'Import Leads' and 'Import Contacts' tab from multi-picklist then click on save button.



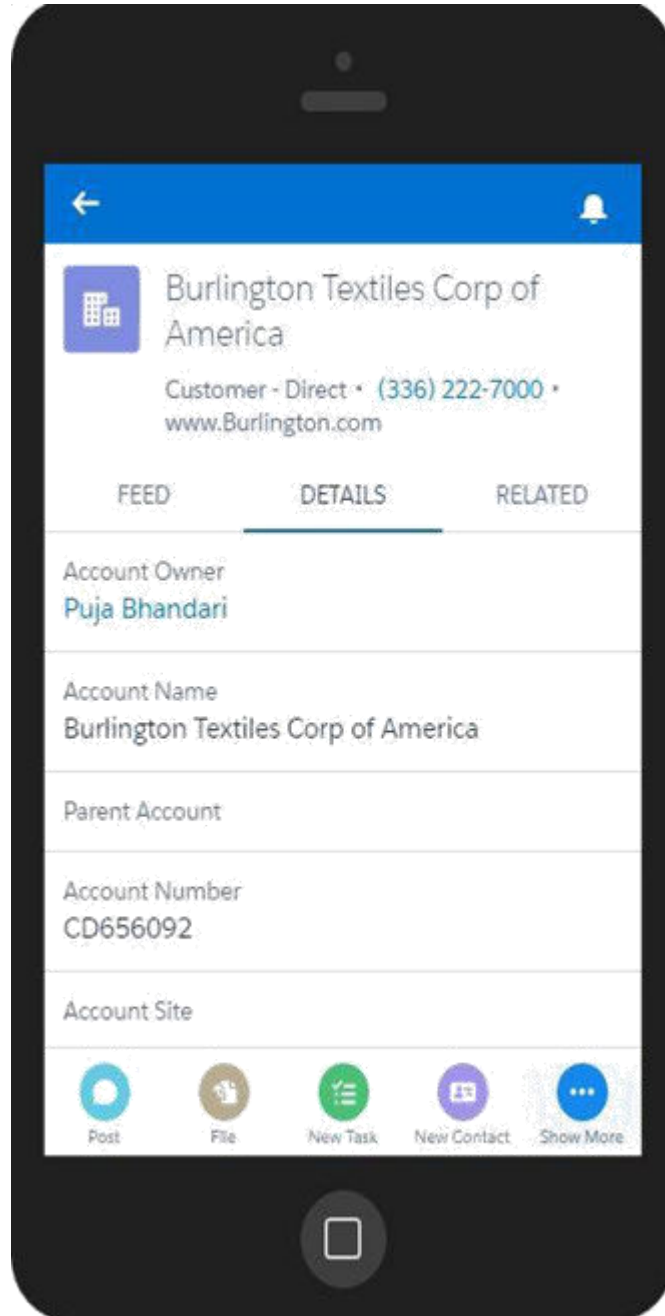
- For Adding “Export VCF” button the steps are as same as we mentioned in step 1.1.
- Now login with your org in your mobile.

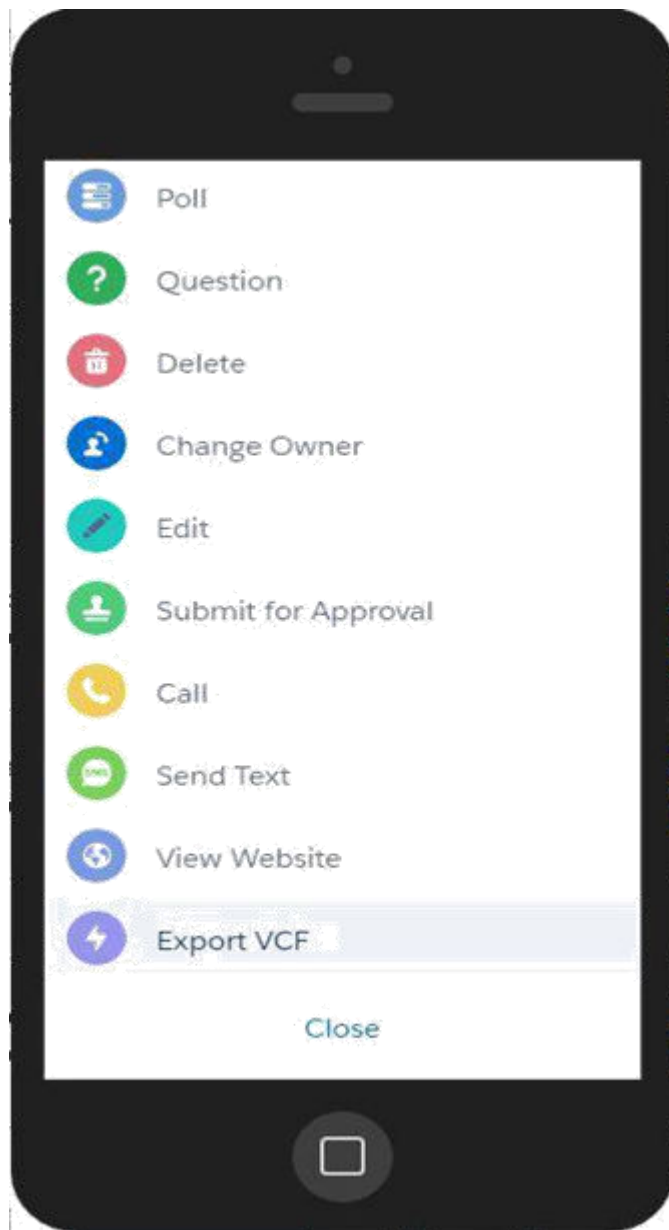


- [Export VCF:](#)
  1. Go to any object from the hamburger icon (three horizontal lines) on the top-left corner of the detail page. (In this case we take an example of Account)



2. choose “Export VCF” button from the ‘Show More’ menu on bottom-right corner of detail page.





Poll



Question



Delete



Change Owner



Edit



Submit for Approval



Call



Send Text



View Website



Export VCF

Close

- **Import VCF:**

Choose Import Contact and Import Leads tab from the drawer on top-left corner of the detail page. (In this case we take an example of Contact)

