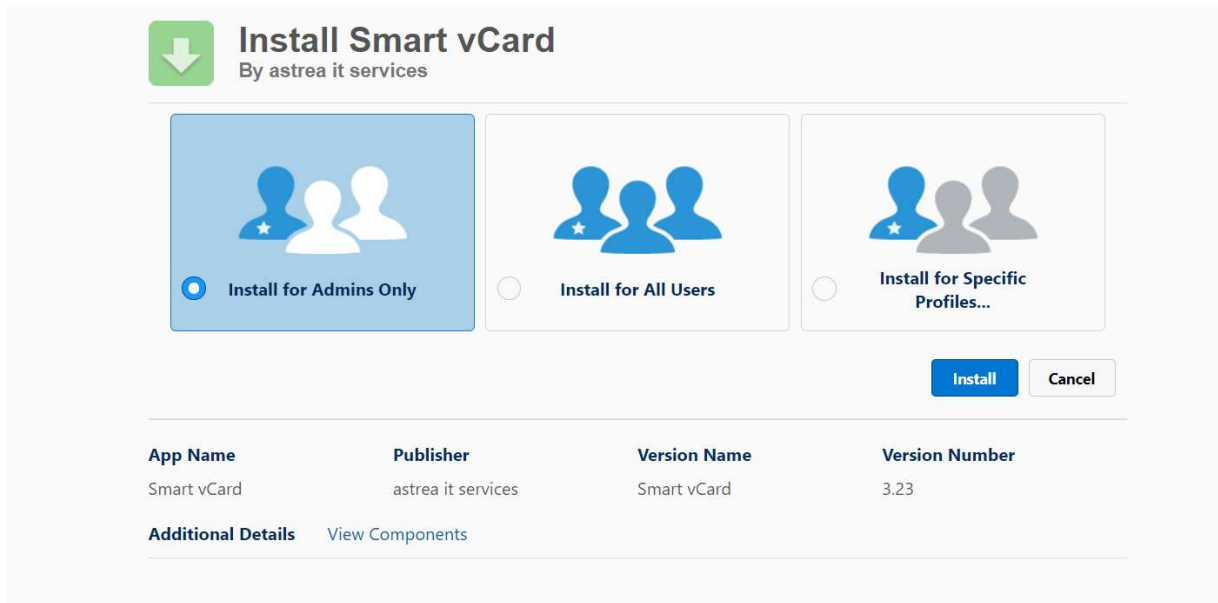


Installing Smart vCard

Installing Smart vCard is simple and works like any other application you've installed from AppExchange.

Click on Get It Now. Select The Org In which you want to install the App.

Choose one option that shows to whom you wanna give access or permission to use this app then click on install and Done button



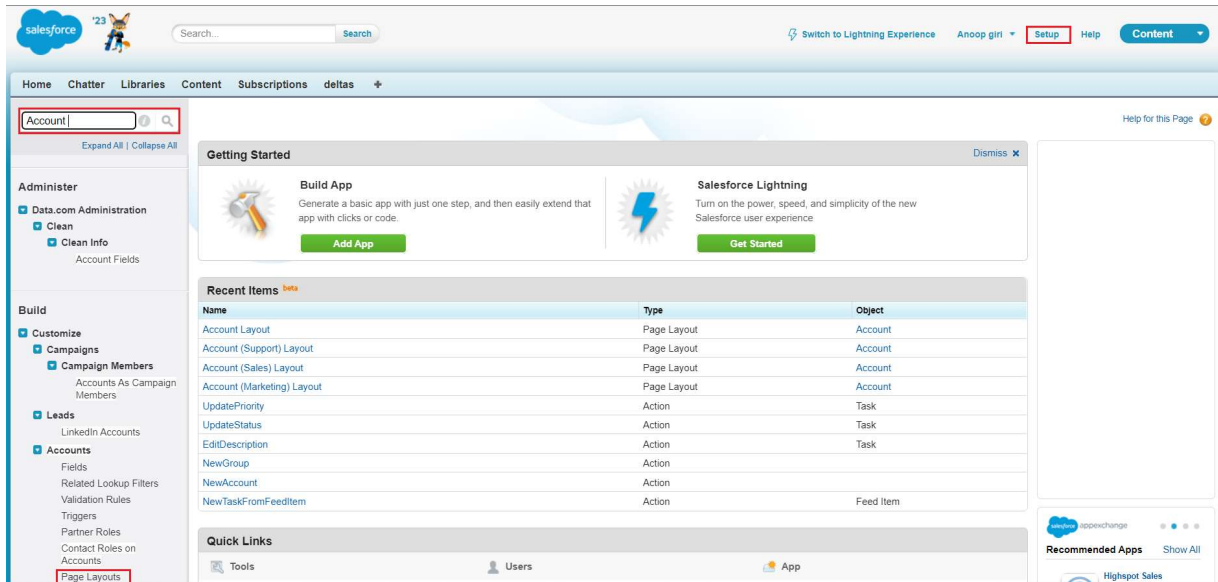
App Name	Publisher	Version Name	Version Number
Smart vCard	astrea it services	Smart vCard	3.23
Additional Details	View Components		

After a couple of minutes, you should receive a message that you will get an email notification when the process completes. This completes the installation of smart vCard on your Salesforce instance. The next step is to set-up smart vCard on your instance. This involves installing buttons on the page layouts of standard pages

Setup of Smart vCard

Once the package is installed, you will just need to add the “Generate vCard” Button to the Contact, Lead, Account pages and a Link to User Page layout.

- Go to Setup->Search Account in Quick Find->Select Page Layouts.



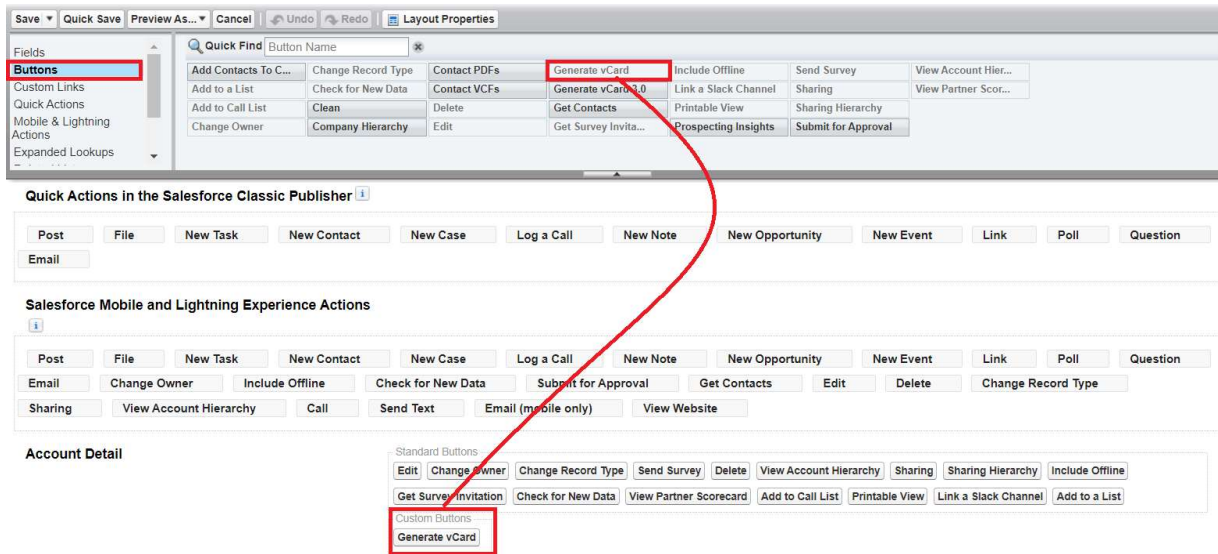
- Click on Page Layout, open a new Page, select the layout for which you want to add a button.

Account Page Layout

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Account Page Layouts				
		New	Page Layout Assignment	
Action	Page Layout Name	Created By	Modified By	Feed-Based Layout
Edit Del	Account (Marketing) Layout	Anoop giri, 12/13/2022, 12:02 PM	Anoop giri, 12/15/2022, 9:24 PM	<input type="checkbox"/>
Edit Del	Account (Sales) Layout	Anoop giri, 12/13/2022, 12:02 PM	Anoop giri, 1/9/2023, 11:23 PM	<input type="checkbox"/>
Edit Del	Account (Support) Layout	Anoop giri, 12/13/2022, 12:02 PM	Anoop giri, 1/9/2023, 11:24 PM	<input type="checkbox"/>
Edit Del	Account Layout	Anoop giri, 12/13/2022, 12:02 PM	Anoop giri, 1/9/2023, 11:24 PM	<input type="checkbox"/>

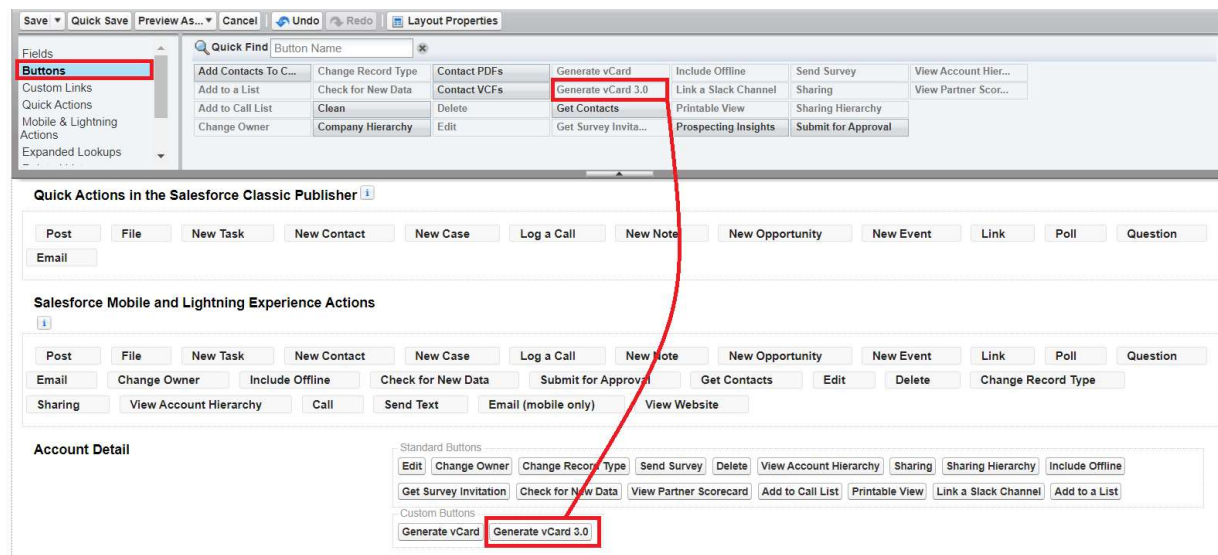
- After selecting page layout Click on Buttons and drag the “Generate vCard” button to the custom button panel and click on save.



- Do the same for Lead, Account and User. You are now ready to use vCard from Lead, Contact, Account and User. You can go to any of these and click on the Generate vCard button in order to export it to the.vcf or pdf vCard format.

To generate vCard in a single click:

- Drag the “Generate vCard 3.0” button to the custom button panel. Do the same for Lead, Account and User. Now you can generate vCard in a single click.



- Do the same for Lead, Contact and User.

For Multiple vCard

- Go to Setup->Find search in Quick Find Box ->Select Account Search Layout
- Click on Edit link of Account List View

Account Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Account Name, Account Site, Phone, Account Owner Alias		Anoop giri, 12/13/2022, 12:02 PM
Edit	Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A	Anoop giri, 12/13/2022, 12:02 PM
Edit	Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A	Anoop giri, 12/13/2022, 12:02 PM
Edit	Accounts Tab	Account Name, Billing City, Phone	N/A	Anoop giri, 12/13/2022, 12:02 PM
Edit	Accounts List View	N/A	New, Open in Quip, New From Document, Clean, Get More Accounts, Discover Companies, Import, Add to Call List, Printable View, Send Message, Add to a List, Export vCards in PDF, Export To Excel	Anoop giri, 1/10/2023, 12:01 AM
Edit	Search Filter Fields		N/A	Anoop giri, 12/13/2022, 12:02 PM

- Select the “Export vCard in PDF” button then Click on add button then click on Save Button

Custom Buttons

Available Buttons

- GenerateCSV
- Generate vCards

Selected Buttons

- Export To Excel
- Export vCards in PDF

Buttons: Add, Remove, Up, Down

List View Actions in Lightning Experience

[New Quick Action](#)

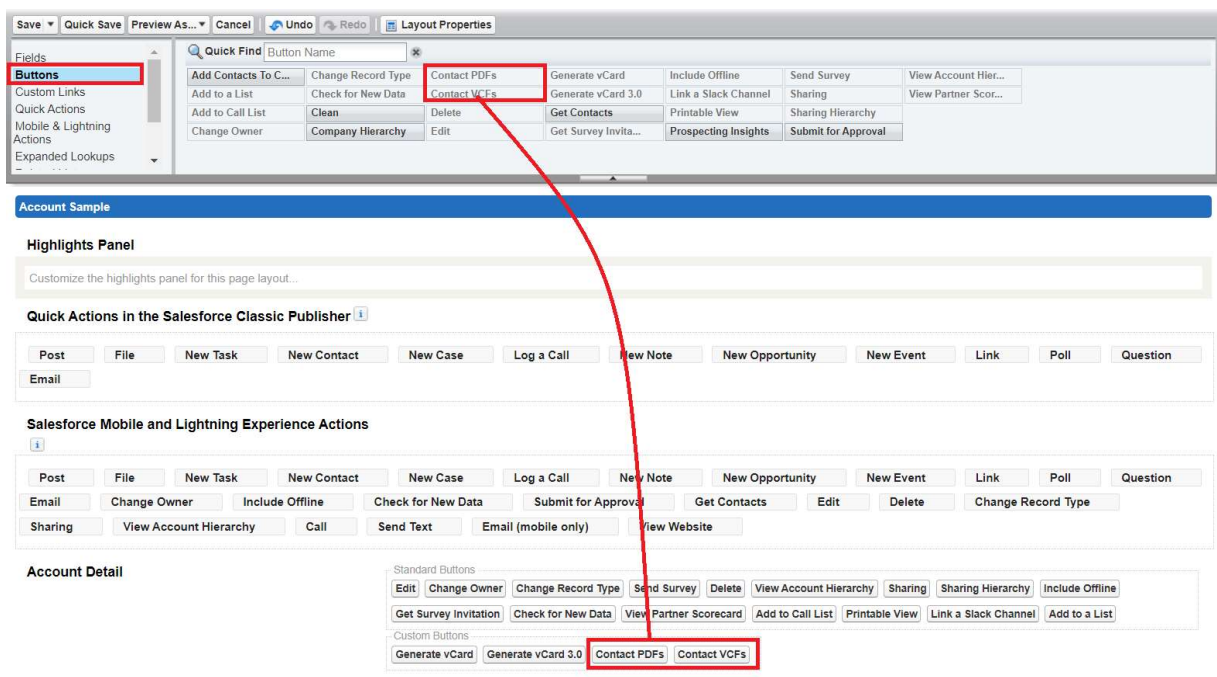
Buttons: Save, Cancel

- Do the same for Lead, Contact and User.

Setup of Smart vCard for all contacts of an account

Once the package is installed, you will just need to add "Contact PDFs" button and "Contact VCFs" button to the Account Detail page

- Go to setup->Search Account in Quick Find Box->Select Page Layouts.
- Select the button on the Account layout page and drag Contact PDFs and Contact VCFs in the Account detail section.

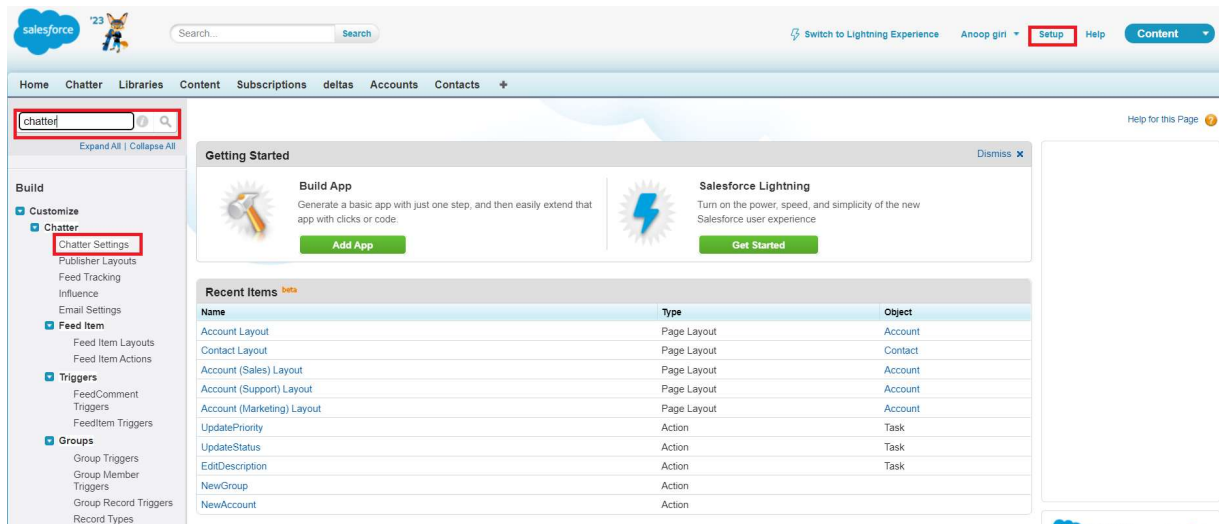


- You are now ready to use vCard for all contacts of an account. You can go to any of these button and click to generate vCard in both .VCF or .PDF format

Setup for generating vCard for specific record (Account/Lead/Contacts) from Chatter

ChEnable after Publisher Actions

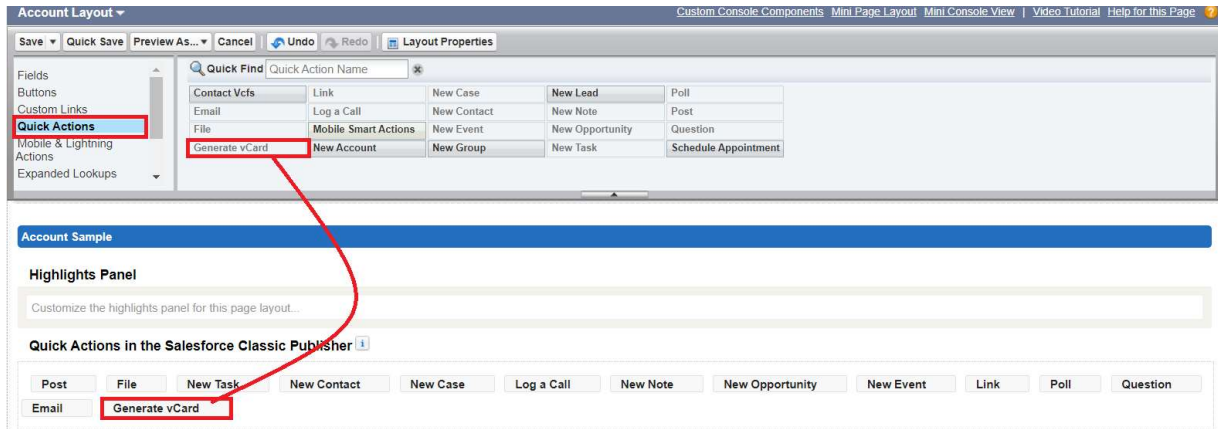
- Setup->search chatter in quick find box->select chatter setting.



- Enable Actions in the Publisher in the Actions in the Publisher section.



- Go to Setup->Account Page Layout->Quick Actions
- Drag and drop GeneratevCard Action in Quick Actions in the Salesforce Classic Publisher and save.



- Do same for Contact and Lead

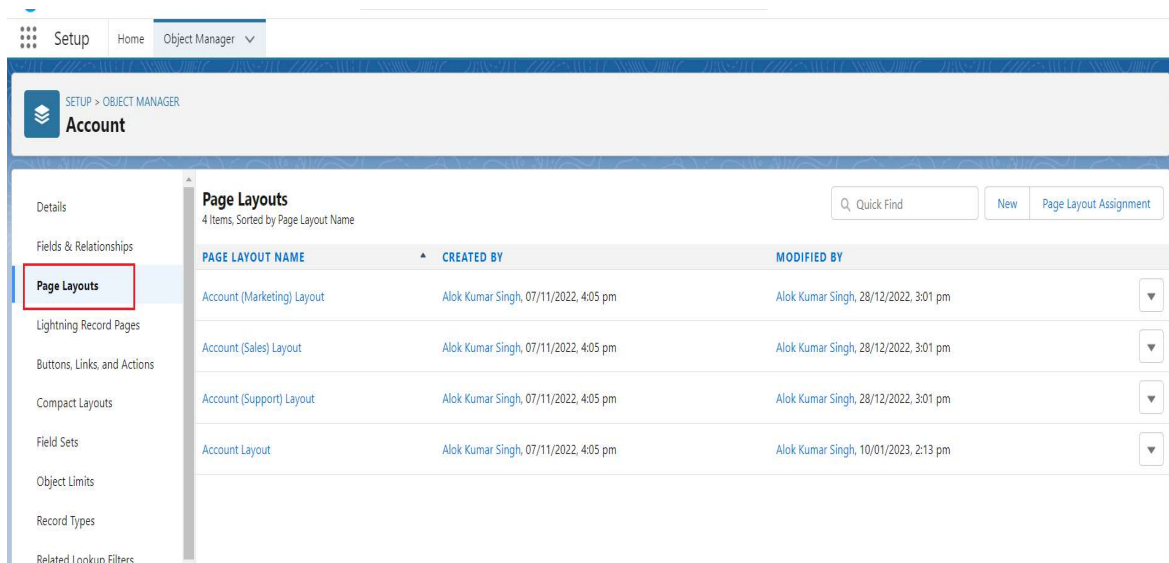
Setup of Smart vCard in Lightning Experience

Once the package is installed, you will just need to go to Object Manager to add a smart vCard button, quick action, list view button on Account, Contact, Lead Pages and custom links on User Pages.

We have shown the configuration of smart vCard on Account and User object below: -

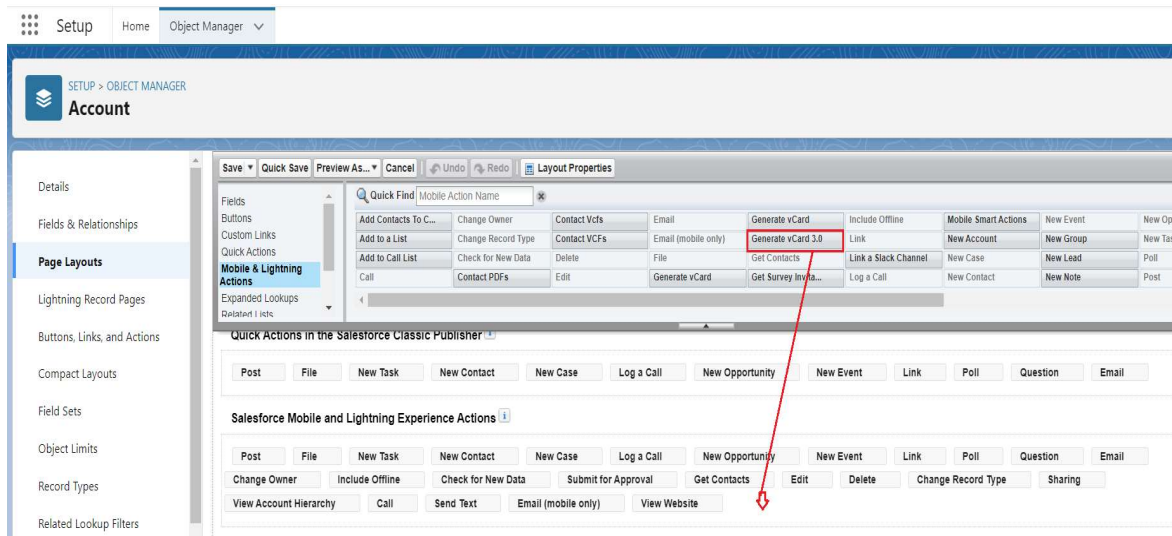
To generate vCard in a single click on Account object:

- Click on “Setup -> Object Manager -> Account -> Page Layouts” and then edit the page layout on which you want to add the functionalities of smart vCard.



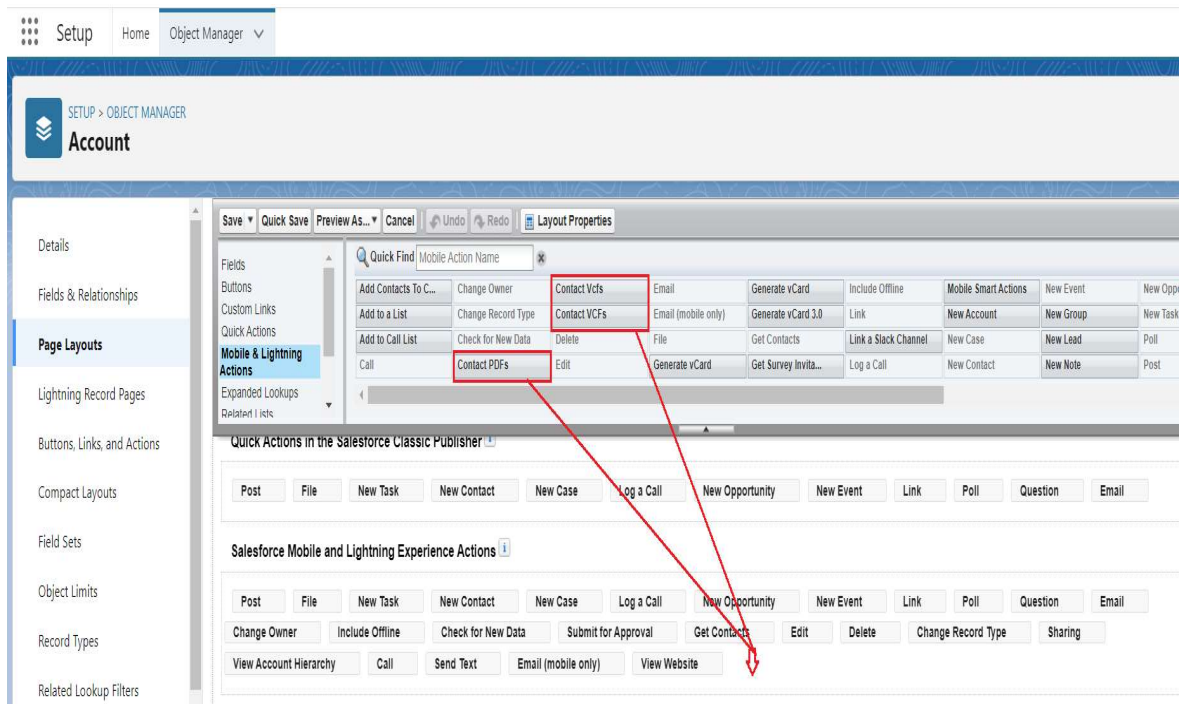
- Drag the “**Generate vCard 3.0**” button to the Salesforce Mobile and Lightning Experience Actions panel. Do the same for Contact, Lead.

Now you can generate vCard in a single click.



To generate vCard for all contacts of an account:

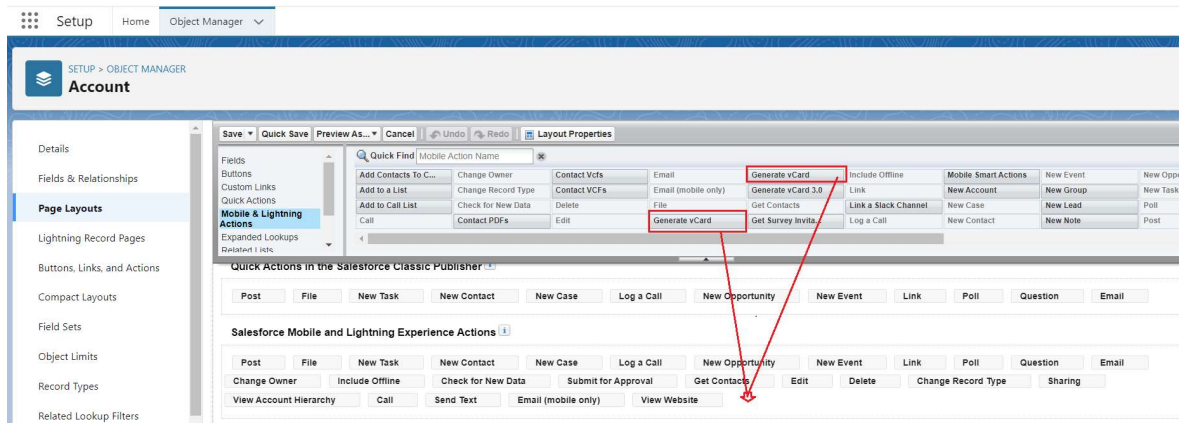
- Click on “Setup -> Object Manager > Account > Page Layouts” and then click on the Page Layout on which you want to add “**Contact PDFs**” button, “**Contact VCFs**” button and “**Contact Vcfs**” quick action to the Account Detail page.



- Click on Salesforce Mobile and Lightning Experience Actions and drag the “Contact PDFs” button to the Salesforce Mobile and Lightning Experience Actions panel. Do the same for "Contact VCFs" button and “Contact Vcfs” quick action.

To generate vCard in format of VCF 2.1, VCF 3.0 or vCard as PDF:

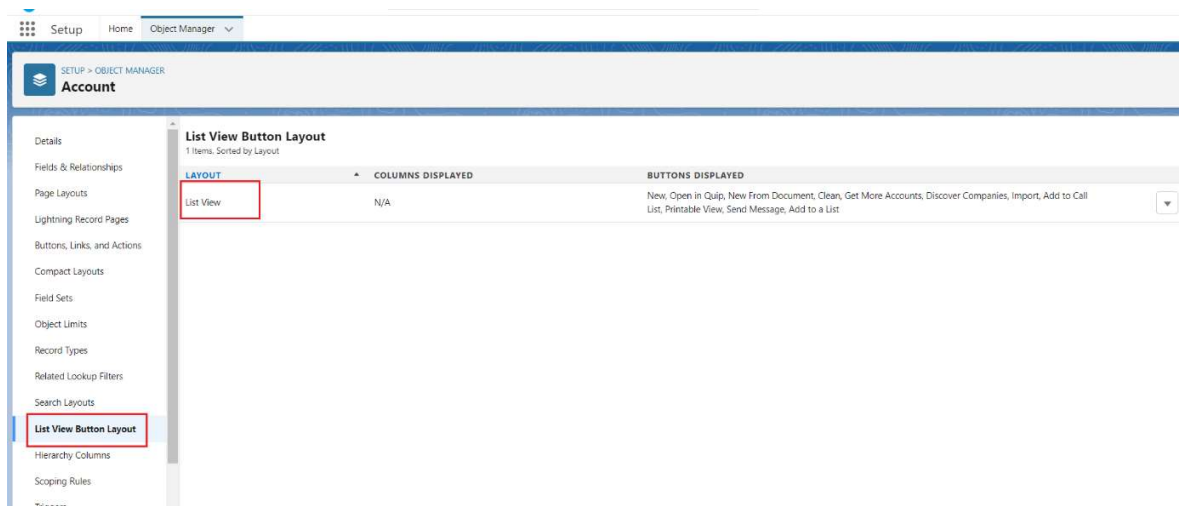
- Click on “Setup -> Object Manager -> Account -> Page Layouts” and then click on the Page Layout on which you want to add the “**Generate vCard**” button and “**Generate vCard**” quick action to the Account Detail page.



- Click on Salesforce Mobile and Lightning Experience Actions and drag the “Generate vCard ” button to the Salesforce Mobile and Lightning Experience Actions panel. Do the same for " Generate vCard " quick action.

Setup for generating multiple vCards from list view of Account:

- Click on “Setup -> Object Manager -> Account -> List View Button Layout” and then edit the List View.



- Select the **“Export vCard in PDF”**, **“GenerateCSV”** and **“Generate vCards”** buttons from Available Custom Buttons and add it to Selected Buttons then click on Save Button. Do the same for Lead & Contact.

