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

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			Install for Specific
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O Install for	r Admins Only In	stall for All Users	
Install for App Name	r Admins Only In:	stall for All Users Version Name	Profiles

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.

Home Chatter Libraries Co	ontent Subscriptions deltas 🕈				
Account 0 Q				Help fo	or this Page
Expand All Collapse All	Getting Started		Dismiss X		
Administer Data.com Administration Clean Clean Info Account Fields	Build App Generate a basic app with just one step, and then easily extend that app with clicks or code. Add App	Salesforce Lightning Turn on the power, speed, and is Salesforce user experience Get Started	implicity of the new		
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Campaign Members	Account (Sales) Layout	Page Layout	Account		
Accounts As Campaign	Account (Marketing) Layout	Page Layout	Account		
Members	UpdatePriority	Action	Task		
LinkedIn Accounts	UpdateStatus	Action	Task		
Accounts	EditDescription	Action	Task		
Fields	NewGroup	Action			
Related Lookup Filters	NewAccount	Action			
Validation Rules	NewTaskFromFeedItem	Action	Feed Item		
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Accounts Page Layouts	🔣 Tools 🤱 Users	🥭 Арр		Highspot Se	

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

Accou	nt Page Layout			Help for this Pa
	llows you to create different page layout o page layouts, click the Page Layout A	s to display Account data. ssignment button to control which page layout us	sers see by default.	
	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	
Edit Del	Account (Sales) Layout	Anoop.giri, 12/13/2022, 12:02 PM	Anoop giri, 1/9/2023, 11:23 PM	
	Account (Support) Layout	Anoop giri, 12/13/2022, 12:02 PM	Anoop giri, 1/9/2023, 11:24 PM	
Edit Del				

• After selecting page layout Click on Buttons and drag the "Generate vCard" button to the custom button panel and click on save.

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	File	New Task	Ne	ew Contact	Ne	ew Case	Log a Call	New Note	New Opp	ortunity	New Ever	Link	Poll	Question
Email Salesforce		New Task d Lightning			N	ew Case	Log a Call	New Note	New Opp	ortunity	New Ever	nt Link	Poll	Question
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Email Salesforce i Post	Mobile an File Change C	d Lightning New Task	Experien Ne	nce Actions ew Contact	Ne	ew Case or New Data	Log a Call	New Note	New Opp Get Contacts	ortunity	New Ever	nt Link	Poll	
Email Salesforce i Post Email	Mobile an File Change C	d Lightning New Task Dwner	Experien Ne	ew Contact	Ne Check fo	ew Case or New Data	Log a Call Subget for Ap	New Note proval	New Opp Get Contacts	ortunity	New Ever	nt Link	Poll	
Email Salesforce i Post Email	Mobile an File Change C View A	d Lightning New Task Dwner	Experien Ne	ew Contact	Ne Check fo Send Te	ew Case or New Data	Log a Call Subget for Ap	New Note proval	New Opp Get Contacts	ortunity	New Ever	nt Link	Poll	
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Email Salesforce Post Email Sharing	Mobile an File Change C View A	d Lightning New Task Dwner	Experien Ne	ew Contact	Ne Check fo Send Te Stand Edit	ew Case or New Data ext Ema dard Buttons	Log a Call Subplit for Ap	New Note proval View V	New Opp. Get Contacts /ebsite	ortunity Edit w Account Hierarch	New Ever Delet y Sharir	nt Link e Change I	Poll Record Type	Question

• 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.

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ck Actions bile & Lightning		Add Contacts To C	Change Recor	d Type Contact PD	Fs Generate vCar	d Include Of	fline	Send Survey	Viev	v Account Hier		
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• 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

slesforce	earch	Search	🖗 Switch to Lightning Experience Ancop giri 👻 Setup	Help Content
ome Chatter Libraries C	content Subscription	ns deltas Accounts +		
earch 🛛 🖉 🔍	Account Se	arch Layouts		Help for this Page
Expand All Collapse All	Search layouts allow	you to select the standard and custom fields th	at are displayed in the following search features:	
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Activity Search Layouts Campaigns Search Layouts Leads Search Layouts	Search layouts also a • Search Res • List Views f	low you to select the standard and custom but ults for search and tagging. or filtering records. <u>View example</u>	tons that are displayed in the following search features:	
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Campaigns Search Layouts Accounts Search Layouts Search Layouts	Search layouts also a • Search Res • List Views f	liow you to select the standard and custom but uits for search and tagging. or filtering records. <u>View example</u> ayouts Columns Displayed Account Name Account Site Ehone Account	Buttons Displayed	Modified By Ancop.gin, 12/13/2022 12:02 PM
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Campaigns Search Layouts Leads Search Layouts Accounts Contacts Search Layouts Opportunities Search Layouts Cases Case Case	Search layouts also a Search Res List Views 1 Account Search L Action Layout Edit Search Resu Edit Lookup Dialo Edit Lookup Phon Dialogs	liow you to select the standard and custom but uits for search and tagging. Thilering records. <u>Your example</u> Columns Displayed Account Name, Account Site, Phone, Account Account Name, Account Site, Account Owner Account Name, Billing City, Phone	Buttons Displayed N/A N/A	Anoop.giri, 12/13/2022 12:02 PM Anoop.giri, 12/13/2022 12:02 PM Anoop.giri, 12/13/2022 12:02 PM Anoop.giri, 12/13/2022

• Select the "Export vCard in PDF" button then Click on add button then click on Save Button

• 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.

To C Change Record Type Check for New Data t Clean Company Hierarchy	Contact PDFs Contact VCFs Delete Edit	Generate vCard Generate vCard 3.0 Get Contacts Get Survey Invita	Include Offline Link a Slack Channel Printable View Prospecting Insights	Send Survey Sharing Sharing Hierarchy Submit for Approval	View Account Hier View Partner Scor		
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• 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 atter Publisher Actions

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

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• Enable Actions in the Publisher in the Actions in the Publisher section.

Actions in the Publisher
Add actions you create to the publisher on the home page, Chatter tab, and record detail pages. With this setting enabled, you can also customize the order in which all actions appear, including Post, File, Link, and Poll.
Enable Actions in the Publisher 🛛 🛃

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

ccount Layout -					Custom Console Components	Mini Page Layout Mini	Console View	Video Tutoria	I Help for this Pag
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Email Generate									

• 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.

Account				
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letails	Page Layouts 4 Items, Sorted by Page Layout Name		Q Quick Find New Pag	e Layout Assignme
ields & Relationships	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
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ightning Record Pages uttons. Links. and Actions	Account (Sales) Layout	Alok Kumar Singh, 07/11/2022, 4:05 pm	Alok Kumar Singh, 28/12/2022, 3:01 pm	
ompact Layouts	Account (Support) Layout	Alok Kumar Singh, 07/11/2022, 4:05 pm	Alok Kumar Singh, 28/12/2022, 3:01 pm	
ield Sets	Account Layout	Alok Kumar Singh, 07/11/2022, 4:05 pm	Alok Kumar Singh, 10/01/2023, 2:13 pm	
bject Limits				

• 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.

SETUP > OBJECT MANAGER										
Account										
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Fields & Relationships	Buttons Custom Links	Add Contacts To C	Change Owner	Contact Vcfs	Email	Generate vCard Generate vCard 3.0	Include Offline	Mobile Smart Actions New Account	New Event	Net
	Quick Actions	Add to a List Add to Call List	Change Record Type Check for New Data		Email (mobile only) File	Generate vCard 3.0	Link Link a Slack Channel	New Case	New Group	New T Poll
Page Layouts		Call	Contact PDFs	Edit	Generate vCard	Get Survey Invita	Log a Call	New Case	New Note	Por
Lightning Record Pages	Expanded Lookups	4								
Buttons, Links, and Actions	Quick Actions in the	Salesforce Classic H	ublisher 🕛							_
Compact Layouts	Post File	New Task	New Contact	New Case Lo	og a Call New Op	portunity Nev	r Event Link	Poll Que	estion Email	
Field Sets	Salesforce Mobile an	d Lightning Experie	nce Actions i							
		New Task	New Contact	New Case Li	og a Call New Op	portunity Nev	v Event Link	Poli Qu	estion Email	
Object Limits	Post File									
Object Limits Record Types		Include Offline	Check for New Data	Submit for Ap	proval Get Conta	cts Edit	Delete Char	nge Record Type	Sharing	

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.

Setup Home Obj	ect Manager 🗸		MGT INSTIC	THE WE				11. 11. 11.	THE SIGH	11:1111
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Details	Save V Quick Save Previ	Q Quick Find Mo		Layout Properties						_
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Page Layouts Custom Links Quick Actions Mobile & Lightning Actions		Add to a List	Change Record Type	Contact VCFs	Email (mobile only)	Generate vCard 3.0	Link	New Account	New Group	New 1
		Add to Call List	Check for New Data	Delete	File	Get Contacts	Link a Slack Channel	New Case	New Lead	Poll
	Call	Contact PDFs	Edit	Generate vCard	Get Survey Invita	Log a Call	New Contact	New Note	Post	
Lightning Record Pages	Expanded Lookups	+		<						
Buttons, Links, and Actions	Quick Actions in the	Salestorce Classic	Publisher 1							
Compact Layouts	Post File	New Task	New Contact	lew Case	Log a Call New C	Opportunity New	/ Event Link	Poll Qi	estion Email	
Field Sets	Salesforce Mobile an	d Lightning Experie	ence Actions i		//					
Object Limits	Post File	New Task	New Contact	lew Case	Log a Call New C	poortunity New	v Event Link	Poli Qi	lestion Email	
Object Limits	Post File									
Record Types		Include Offline	Check for New Data	Submit for A	pproval Get Con	tach Edit	Delete Cha	nge Record Type	Sharing	

• 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.

SETUP > OBJECT MANAGER										
Account										
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Tields & Relationships	Custom Links	Add to a List	Change Record Type	Contact VCFs	Email (mobile only)	Generate vCard 3.0	Link	New Account	New Group	Ne
Page Layouts Quick Actions	Mobile & Lightning	Add to Call List	Check for New Data	Delete	File	Get Contacts	Link a Slack Channel	New Case	New Lead	Po
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Lightning Record Pages	Expanded Lookups Related Lists					/				
Buttons, Links, and Actions	Quick Actions in the	Salestorce Classic Pu	iblisher 🕛							
Connect	Post File	New Task N	ew Contact N	ew Case Loo	a Call New Opp	Nov	Event Link	Poll Qu	estion Email	
Compact Layouts	Post File	New lask N	ew contact N	ew case Log	a call New Opp	portunity New	Event Link	Poli Qui	esuon Email	
Field Sets	Salesforce Mobile ar	nd Lightning Experience	ce Actions							
older Hele									estion Email	
Object Limits	Post File	New Task N	lew Contact N	ew Case Log	a Call New Opp	portunity New	Event Link	Poll Qu	estion Email	

• 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.

SETUP > OBJECT MANAGER Account		
s List View	Button Layout	
s & Relationships	 COLUMNS DISPLAYED 	BUTTONS DISPLAYED
nyouts 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
ns, Links, and Actions		
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h Layouts		
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chy Columns		
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• 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.

SETUP > OBJECT MANAGER							
Details	Eill Search Layout Accounts List View						
Fields & Relationships	Customize the buttons on the Accounts list view.						
Page Layouts	To remove any standard buttons, remove the check next to the standard button name. To add custom buttons, select them and click Add.						
Lightning Record Pages	Standard Buttons						
Buttons, Links, and Actions	Vew [New] Voen in Oulp [OpenListInQuip]						
Compact Layouts	Vew From Document [NewFromDocument]						
Field Sets	Clean [ListClean] Get More Accounts [DataDotComGetAccountsMultiAddAction]						
Object Limits	Discover Companies [DiscoveryGetAccountsAction] Import [Import]						
Record Types	Z Add to Call List (MassCreateCallList)						
Related Lookup Filters	V Printable View (PrintableListView) V Send Message (SendBulkMessageAction)						
Search Layouts	Z Add to a List [MassAddToActionableList]						
List View Button Layout	Custom Buttons						
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