

# ***Astrea Smart vCard***

## ***User Manual***

***A Product By: Astrea IT Service***

## **OVERVIEW**

vCard is a file format standard for electronic business cards and are often attached to e-mail 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, e-mail addresses, URLs, etc.

This product is designed for users to export and import vCard in a single click. It also supports different file formats.

## **FEATURES**

**The Key features of the product are-**

### **(1) Account**

- Export multiple vCard in PDF format.
- Support single vCard export in PDF and VCF 2.1 and VCF 3.0 format.
- Export vCard for all contacts of any account in VCF and PDF format too.

### **(2) Contact**

- export multiple vCards in PDF and VCF Format.
- Support single vCard export in PDF and VCF 2.1 and VCF 3.0 format.
- Import one or multiple contacts from a VCF file.

### **(3) Lead**

- Export multiple vCard in PDF format.
- Support single vCard export in PDF and VCF 2.1 and VCF 3.0 format.

### **(4)User**

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

**Below are the Astrea Smart VCard Features:**

1. [Generating Single vCard for Contact, Lead, Account and User](#)
  - 1.1. [Generate vCard in a single click](#)
    - 1.1.1. Go to any Contact Record
    - 1.1.2. The generated vcf can be used with any email application like Outlook.
  - 1.2. [Generating Single vCard](#)
    - 1.2.1. Go to any Contact Record
    - 1.2.2. Click on "Generate vCard Button". After clicking a page with options appears
- 1.3. [After selecting the format click on the "Generate vCard" button.](#)  
[After clicking a page appears with](#)
  - 1.4 [For downloading vCard](#)
  - 1.5. [If you want vCard in pdf format then choose "vCard As PDF" option in step2 and then click](#)
  - 1.6. [After clicking vCard as pdf format appears.](#)
  - 1.7. [For Account, Lead and User we have to follow the same process from steps 1 to 6.](#)
2. [Custom field mapping](#)
3. [Generate vCards for all contacts for a particular Account](#)
  - 3.1. [In VCF Format](#)
  - 3.2. [In PDF Format](#)
4. [Generating multiple vCard in pdf format for Contact, Lead and Account](#)
5. [Generating multiple vCard in VCF format for Account](#)
6. [Importing multiple Account from VCF file](#)
7. [Generating vCard from Chatter feed of Account, Contact and Lead](#)

## 1. Generating Single vCard for Contact, Lead, Account and User:

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 "generate vCard 3.0" button is not available in layout, please add "generate vCard 3.0" button on layout as per installation guide.

#### 1.1.1. Go to any Account Record.



<b>Account Detail</b>		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Sharing</a>	<a href="#">Include Offline</a>	<a href="#">Manage External Account</a>	<a href="#">Generate vCard</a>	<a href="#">Generate vCard 3.0</a>	<a href="#">Contact PDFs</a>	<a href="#">Contact VCFs</a>
Account Owner	 <a href="#">anoop.kumar.giri</a> <a href="#">[Change]</a>					Rating	Cold			
Account Name	Express Logistics and Transport <a href="#">[View Hierarchy]</a>					Phone	(503) 421-7800 			
Parent Account						Fax	(503) 421-7801			
Account Number	CC947211					Website	<a href="http://www.expressl&amp;t.net">http://www.expressl&amp;t.net</a>			
Account Site						Ticker Symbol	EXLT			
Type	Customer - Channel					Ownership	Public			
Industry	Transportation					Employees	12,300			
Annual Revenue	\$950,000,000					SIC Code	8742			
count opportunity	4									
unique code										
New Contact Date	29/11/2021									
count	3									
No of Opportunities batch										
No of Attachment										
Count Of Female gender	1									
Count_Of_Male_Gender__c	1									
Count Contact										
geoloc	25°19'0"N 82°58'54"E									
delta										
Billing Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR					Shipping Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States			

Figure 1: Generate vCard 3.0 button on Account detail page

### 1.1.2. The generated vcf can be used with any application like Windows Contacts.

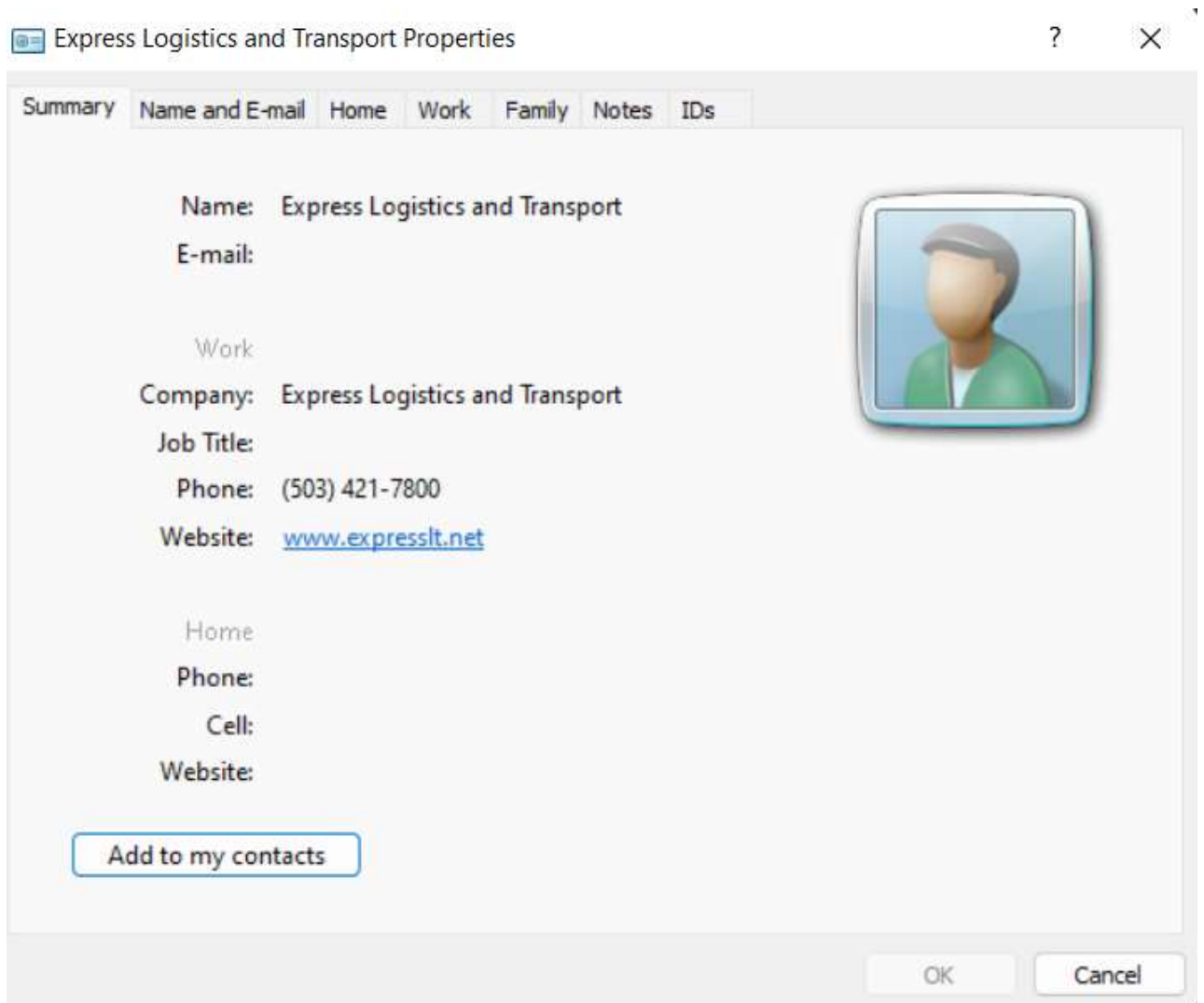


Figure 2: Downloaded vcf Account

## **1.2. Generating Single vCard :**

### **1.2.1. Go to any Account Record.**

If you want to generate vCard and "generate vCard" button is not available in layout, please add "generate vCard " button on layout as per installation guide.

Account Detail
Edit
Delete
Sharing
Include Offline
Manage External Account
Generate vCard
Generate vCard 3.0
Contact PDFs
Contact VCFs

Account Owner	anoop.kumar.giri [Change]	Rating	Cold
Account Name	Express Logistics and Transport [View Hierarchy]	Phone	(503) 421-7800
Parent Account		Fax	(503) 421-7801
Account Number	CC947211	Website	<a href="http://www.expressl&amp;t.net">http://www.expressl&amp;t.net</a>
Account Site		Ticker Symbol	EXLT
Type	Customer - Channel	Ownership	Public
Industry	Transportation	Employees	12,300
Annual Revenue	\$950,000,000	SIC Code	8742
count opportunity	4		
unique code			
New Contact Date	29/11/2021		
count	3		
No of Opportunities batch			
No of Attachment			
Count Of Female gender	1		
Count_Of_Male_Gender__c	1		
Count Contact			
geoloc	25°19'0"N 82°58'54"E		
delta			
Billing Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR	Shipping Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States

Figure 3: Generate vCard button on Account detail page

### 1.2.2. Click on "Generate vCard Button". After clicking a page with options appears

Select vCard Format

☒ VCF 2.1
☐ VCF 3.0
☐ vCard As PDF

Generate vCard

Figure 4: Available format for vCard

Select the format. Smart vCard supports three types of formats –

- a) VCF 2.1
- b) VCF 3.0
- c) vCard in PDF format

**1.3. After selecting the format click on "Generate vCard" button. After clicking a page appears with**

Text format vCard.

DownloadOKCancel

```
BEGIN:VCARD
VERSION:2.1
N:;Express Logistics and Transport
FN:Express Logistics and Transport
ORG:Express Logistics and Transport
TITLE:
TEL;TYPE=WORK;VOICE:(503) 421-7800
TEL;TYPE=WORK;FAX:(503) 421-7801
ADR;TYPE=WORK;;620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States;Portland;OR;;
LABEL;TYPE=WORK;620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR
ADR;TYPE=HOME;;
LABEL;TYPE=HOME:
EMAIL;PREF;INTERNET:
URL;WORK:www.expressl&t.net
NOTE:Express Logistics and Transport
REV:20080424T195243Z
END:VCARD
```

DownloadOKCancel

---

Figure 5: Format of Accounts for download

**1.4.** Now for downloading this vCard in vcf format click on the "Download" button. After clicking a card is downloaded to your desktop. The generated vcf can be used with any email application like Windows Contact.

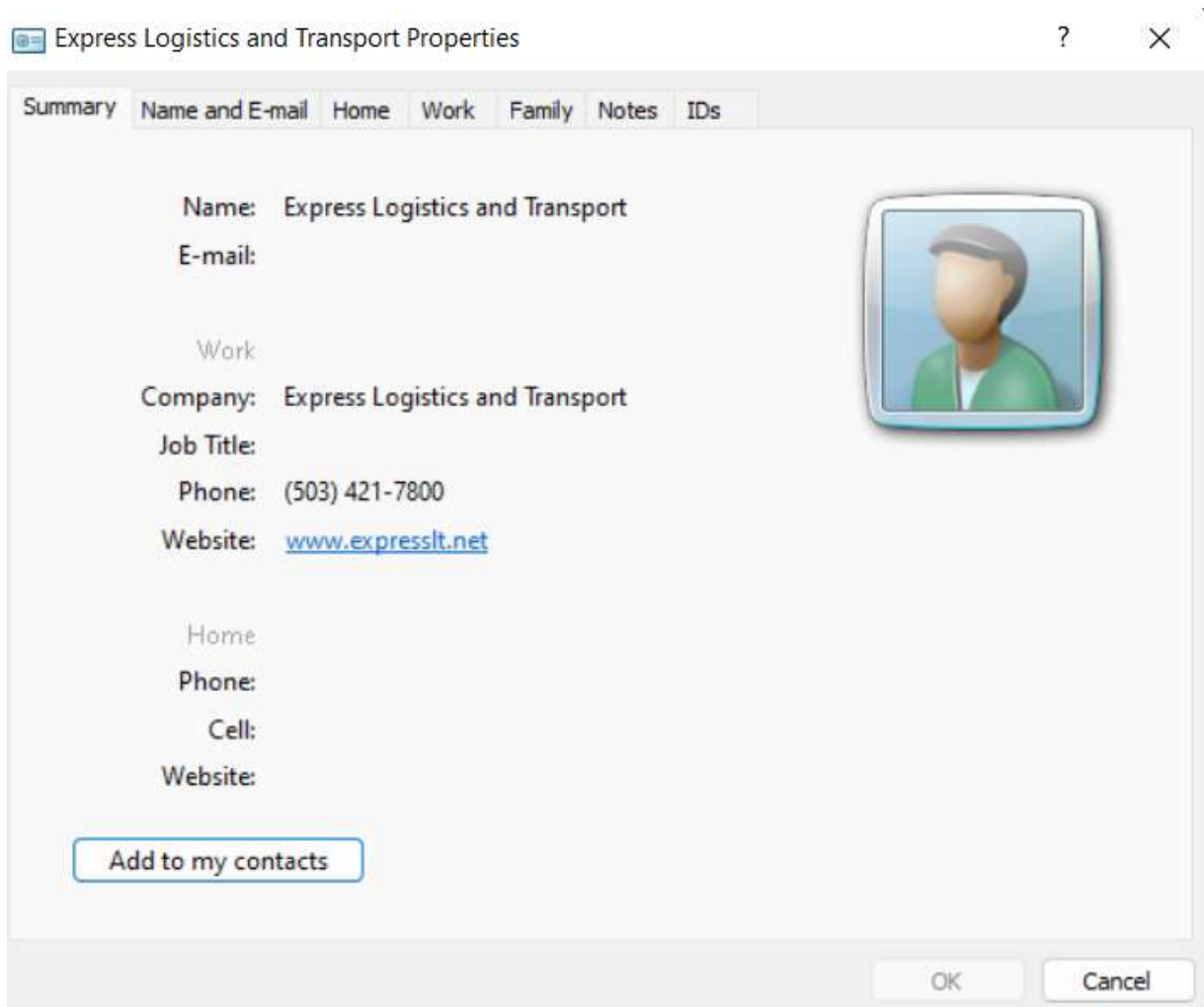
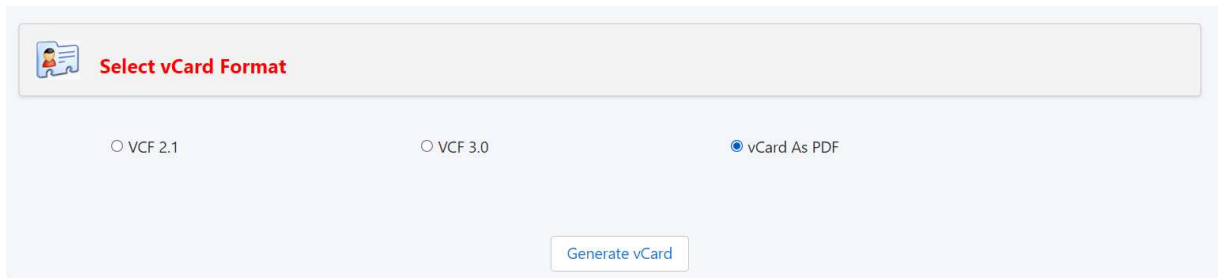


Figure 6: Downloaded vcf Account



**1.5. If you want vCard in pdf format then choose "vCard As PDF" option in step2 and then click**

A screenshot of a web interface titled "Select vCard Format". It features three radio button options: "VCF 2.1", "VCF 3.0", and "vCard As PDF". The "vCard As PDF" option is selected, indicated by a blue dot. Below the options is a button labeled "Generate vCard".

Select vCard Format

☐ VCF 2.1      ☐ VCF 3.0      ☒ vCard As PDF

Generate vCard

Figure 7: selection of vCard format

**1.6. After clicking vCard the pdf format appears.**



Figure 8: vCard in pdf Format

**1.7.** For Account, Lead and User we have to follow the same process from steps 1 to

## 2. Custom field mapping

vCard has a vCards Notes field. This feature is used if you wish to map custom fields of Contact, Lead, Account and User to Notes field of vCard.

1. A Notes tab is created during the smart vCard installation process. Click on Notes Tab and create a new record if you wish to map field in notes section of vCard
  - i. Enter valid comma-separated API names of fields in text areas. There are 4 text areas Contact, Lead, Account and User one for each object.
2. Once this mapping is defined, the user can use the standard process of vCard generation explained above to generate vCards with Notes.

The screenshot shows a web application interface for editing a vCard note. The top navigation bar includes tabs for 'Content', 'Subscriptions', 'deltas', 'Accounts', 'Contacts', and 'Vcard Notes' (the active tab). Below this, the page title is 'New Vcard Note' with a 'Help for this Page' link. The main form area is titled 'Vcard Note Edit' and contains a red banner with the instruction 'Enter only comma Seprate Value' and a legend 'I = Required Information'. There are four text input fields labeled 'Contact', 'Account', 'Lead', and 'User', each with a red vertical bar on the left indicating required information. At the bottom, there's an 'Owner' field with the value 'Anoop giri'. The form has 'Save', 'Save & New', and 'Cancel' buttons at the top and bottom.

Figure 9: Custom Field mapping

## Multiple Smart vCard

### 3. Generate vCards for all contacts for a particular Account

Once Application(Smart vCard software) has been successfully installed then two buttons "Contact VCFs" and "Contact PDFs" will be placed on the account detail page as shown in Figure

The screenshot shows the 'Account Detail' page for an account named 'Express Logistics and Transport'. The page includes a header with buttons: 'Edit', 'Delete', 'Sharing', 'Include Offline', 'Manage External Account', 'Generate vCard', 'Generate vCard 3.0', 'Contact PDFs', and 'Contact VCFs'. The 'Contact PDFs' and 'Contact VCFs' buttons are highlighted with a red box. The account details are as follows:

Account Detail	
Account Owner	anooop.kumar.giri [Change]
Account Name	Express Logistics and Transport [View Hierarchy]
Parent Account	
Account Number	CC947211
Account Site	
Type	Customer - Channel
Industry	Transportation
Annual Revenue	\$950,000,000
count opportunity	4
unique code	
New Contact Date	29/11/2021
count	3
No of Opportunities batch	
No of Attachment	
Count Of Female gender	1
Count_Of_Male_Gender__c	1
Count Contact	
geoloc	25°19'0"N 82°58'54"E
delta	

Figure 10: Two buttons on Account detail page after installation of software

First button i.e. "Contact VCFs" will generate Smart vCard for all contacts of any account in a VCF format. Second button i.e. "Contact PDFs" will generate Smart vCard for all contacts of any account in PDF format.

#### 3.1. In VCF Format

Go to any account detail page.

- For this account there are several related lists like Contacts, Opportunities, Cases, Open activities, Activity history etc.
- Check for the number of contacts for that account.
- In our case there are two contacts as shown in Figure 11. There may be any number of Contacts.

Account Detail

EditDeleteSharingInclude OfflineManage External AccountGenerate vCardGenerate vCard 3.0Contact PDFsContact VCFs

Account Owner	<a href="#">angoo.kumar@itl</a> <a href="#">Change</a>	Rating	Cold
Account Name	Express Logistics and Transport <a href="#">View Hierarchy</a>	Phone	(503) 421-7800
Parent Account		Fax	(503) 421-7801
Account Number	CC947211	Website	<a href="http://www.expressitl.net">http://www.expressitl.net</a>
Account Site		Ticker Symbol	EXLT
Type	Customer - Channel	Ownership	Public
Industry	Transportation	Employees	12,300
Annual Revenue	\$950,000,000	SIC Code	8742
count opportunity	4		
unique code			
New Contact Date	29/11/2021		
count	3		
No of Opportunities batch			
No of Attachment			
Count Of Female gender	1		
Count_Of_Male_Gender_c	1		
Count Contact			
geoloc	25°19'0"N 82°58'54"E		
delta			
Billing Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States Portland OR	Shipping Address	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States
Customer Priority	Medium	SLA	Platinum
SLA Expiration Date	24/04/2021	SLA Serial Number	4724
Number of Locations	150	Upsell Opportunity	Maybe
Active	Yes		
Created By	<a href="#">angoo.kumar@itl</a> , 28/09/2021, 7:47 pm	Last Modified By	<a href="#">angoo.kumar@itl</a> , 13/10/2022, 12:43 pm
Description	Commercial logistics and transportation company.		
job			
Custom Links	<a href="#">Billing</a>		

Contacts

New ContactMerge ContactsExport To Excel

Contacts Help

Action	Contact Name	Title	Email	Phone
<input type="checkbox"/> Edit   Del	Josh Davis	Director, Warehouse Mgmt	<a href="mailto:j.davis@expressitl.net">j.davis@expressitl.net</a>	(503) 421-7800
<input type="checkbox"/> Edit   Del	Babara Levy	SVP, Operations	<a href="mailto:b.levy@expressitl.net">b.levy@expressitl.net</a>	(503) 421-7800

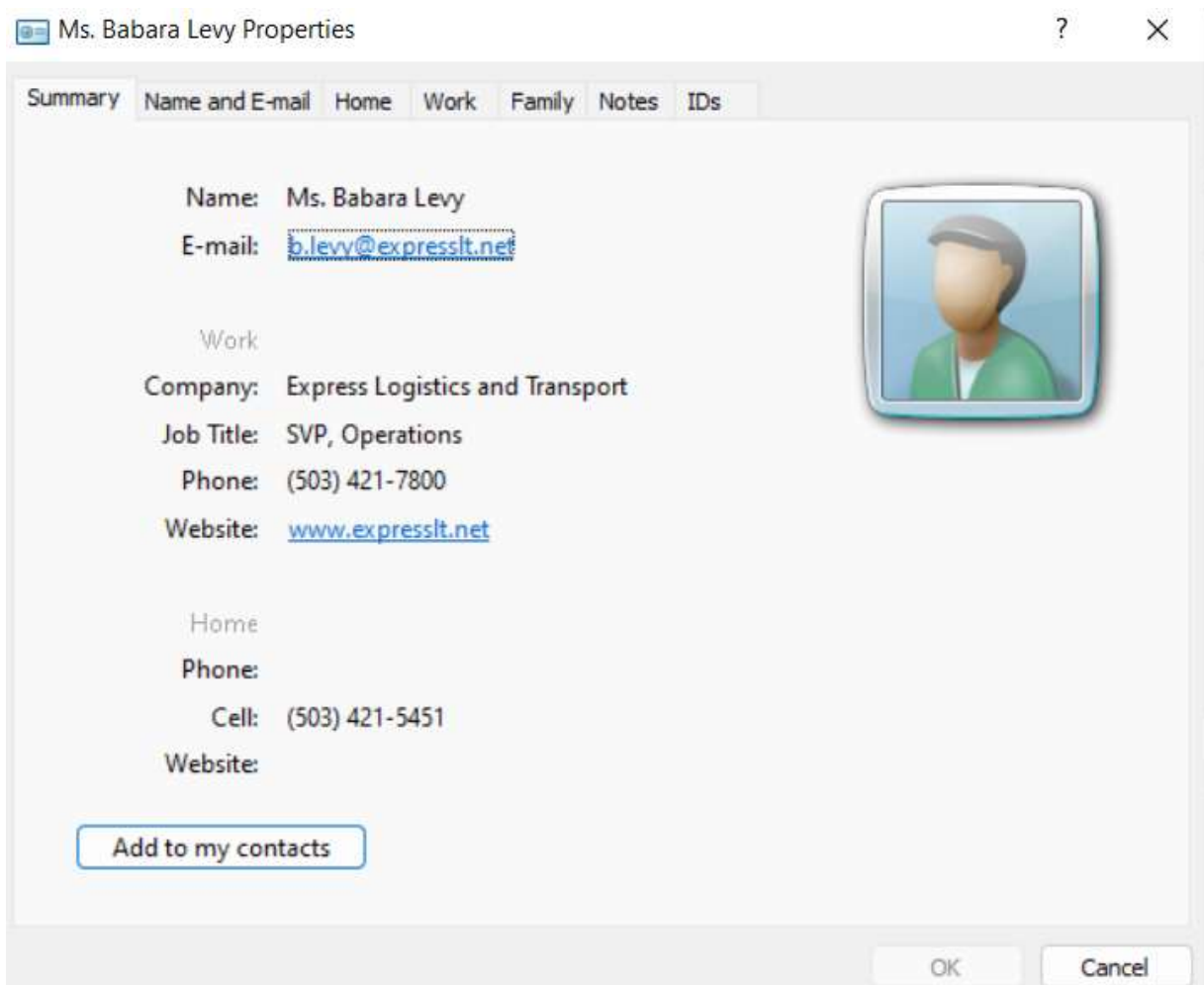
Figure 11: Displaying Contacts for any account

4. Now click on the "Contact VCFs" button. Your VCF file containing two records will be saved in your download folder.

**NOTE-If** there are **no contacts** for the account then an **empty VCF** file will get generated

### 3.2. In PDF Format

1. Go to any account detail page.
2. For this account there are several related list like Contacts, Opportunities, Cases, Open activities, Activity history etc.
3. Check for the number of contacts for that account.
4. Now click on the "Contact PDFs" button. On click PDF for all contacts will be generated. You can save it by clicking on the save button as shown in Figure 12



The screenshot shows a window titled "Ms. Babara Levy Properties" with a standard Windows-style title bar (minimize, maximize, close buttons). The window has a tabbed interface with the following tabs: "Summary", "Name and E-mail", "Home", "Work", "Family", "Notes", and "IDs". The "Summary" tab is currently selected. The content area displays the following information:

- Name:** Ms. Babara Levy
- E-mail:** [b.levy@expresslt.net](mailto:b.levy@expresslt.net)
- Work**
  - Company:** Express Logistics and Transport
  - Job Title:** SVP, Operations
  - Phone:** (503) 421-7800
  - Website:** [www.expresslt.net](http://www.expresslt.net)
- Home**
  - Phone:**
  - Cell:** (503) 421-5451
  - Website:**

At the bottom left of the content area is a button labeled "Add to my contacts". At the bottom right of the window are two buttons: "OK" and "Cancel". To the right of the contact information, there is a placeholder image of a person's head and shoulders, indicating a missing profile picture.

Mr. Josh Davis Properties

Summary Name and E-mail Home Work Family Notes IDs

Name: Mr. Josh Davis

E-mail: [j.davis@expresslt.net](mailto:j.davis@expresslt.net)

Work

Company: Express Logistics and Transport

Job Title: Director, Warehouse Mgmt

Phone: (503) 421-7800

Website: [www.expresslt.net](http://www.expresslt.net)

Home

Phone: 8888888888

Cell: (503) 421-4387

Website:

Add to my contacts

OK Cancel




Figure 12: Record or information of two contacts in PDF format

## 4. Generating multiple vCard in pdf format for Contact, Lead and Account

1. If you want to export Mass vCards then go to List view of Accounts.
2. Select the records for which vCard needs to be generated.
3. Then click on the "Export vCard in PDF" button.

Export vCard in PDF button

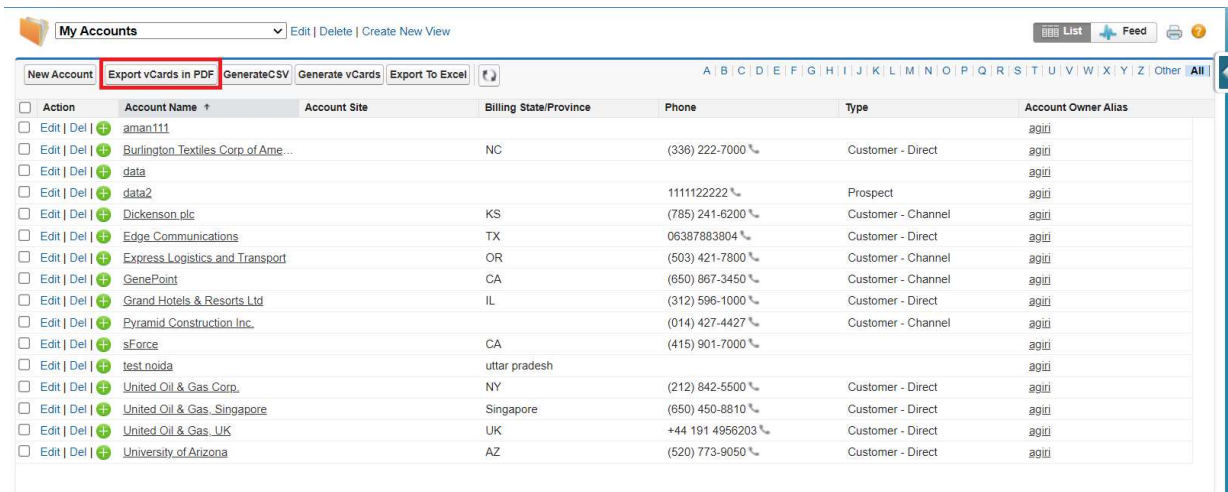


Figure 13: "Export vCard in PDF" button on List view of contacts

4. After clicking vCard of selected contacts appear.

For Contacts, Lead and User we have to follow the above steps 1 to 4.

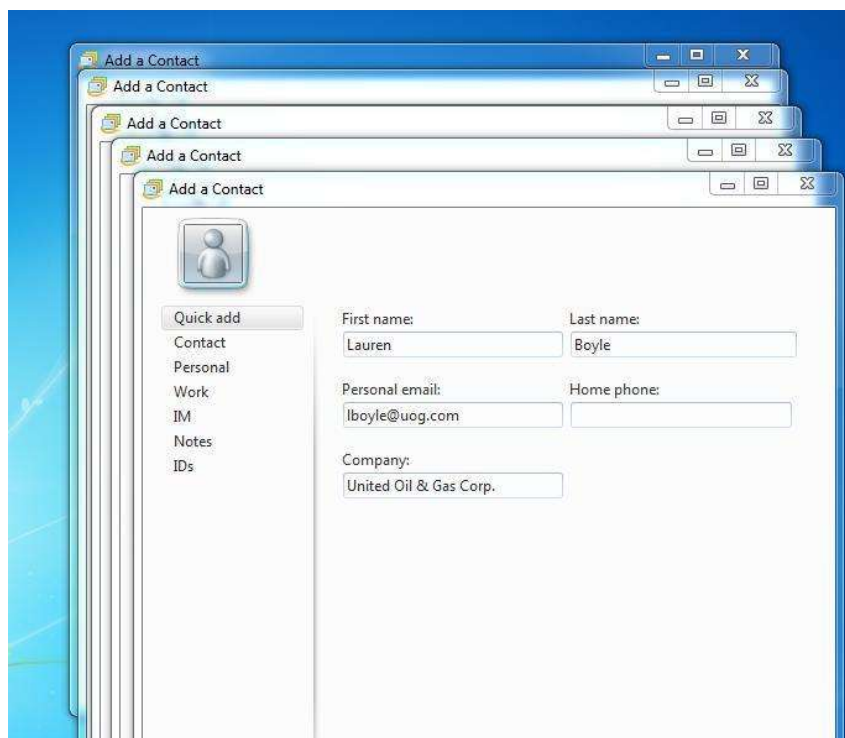
## 5. Generating multiple vCard in VCF format for Accounts

1. If you want to export Mass vCards then go to List view of Accounts.
2. Select the records for which vCard needs to be generated.
3. Then click on the "Generate vCards" button.



Figure 14: Multiple contacts in pdf format

4. A vcf file will get downloaded on your computer, which will contain multiple contacts that you selected.





## 6. Importing Accounts from VCF file

1. Go to the "Import vCards" tab and click it.
2. After clicking the following page appears. On this page steps for importing a VCF file are written. Read those carefully before importing.

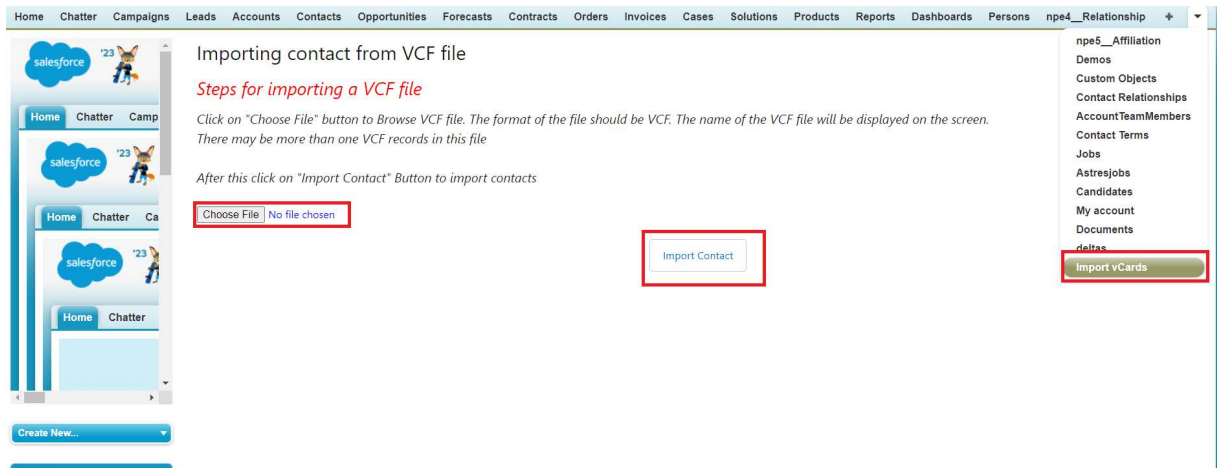


Figure 15: Home page displaying Import vCards tab after successfully installation

3. When you click on **"Choose file"** button a pop window appears which allow you to select a VCF file which contains multiple contacts. Now select a VCF file from your computer and click Open. Your VCF file has been received.

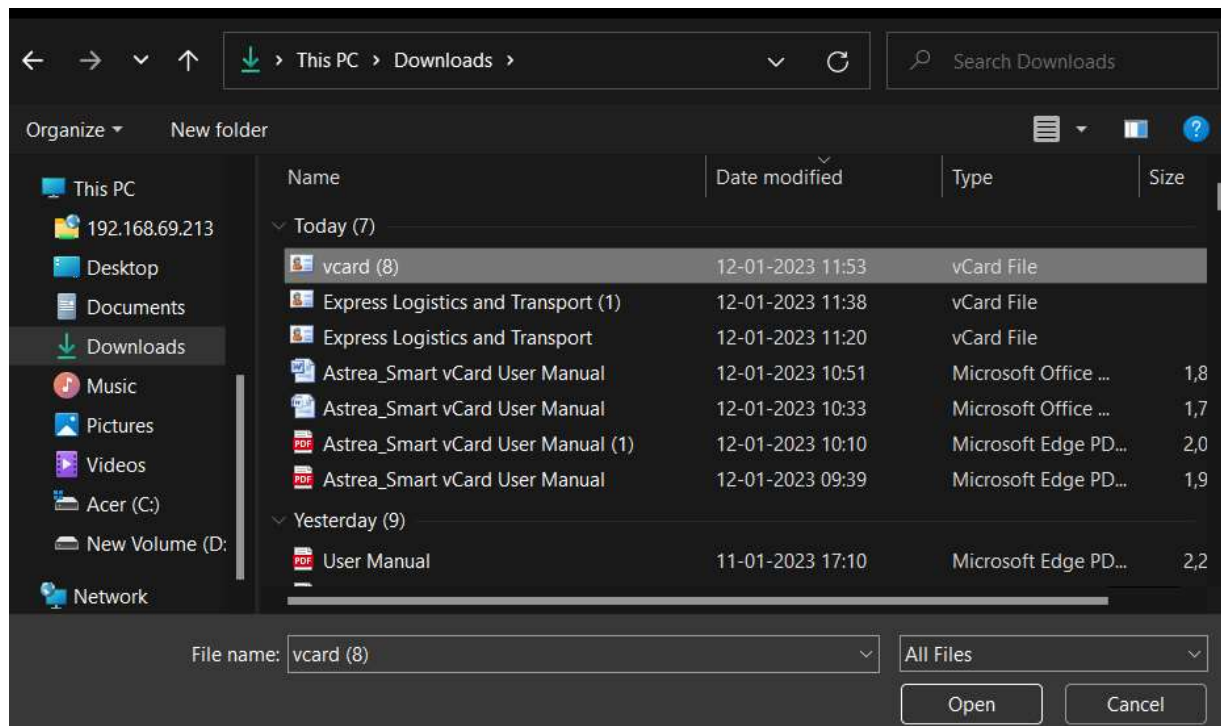



Figure 17: Selecting correct VCF file for importing

4. After this click on the **"Import Contact"** button to import multiple contacts.

5. If operation (importing contacts) is successful then the page displays an **information message** to indicate the number of contacts inserted successfully. and **error message** to indicate the number of contacts which are not inserted successfully. Here on this page there is a view result section which contains two hyperlink **"View Success Result"** and second is **"View Error Result"**.

 Number of Successfully inserted Contacts = 1

### Importing contact from VCF file

#### *Steps for importing a VCF file*

*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*

*After this click on "Import Contact" Button to import contacts*

[No file chosen](#)

6. Now click "View Success Result" to see successfully inserted contacts.

7. You can also see errors in contacts which are not successfully inserted by clicking on "View Error Result" hyperlink.

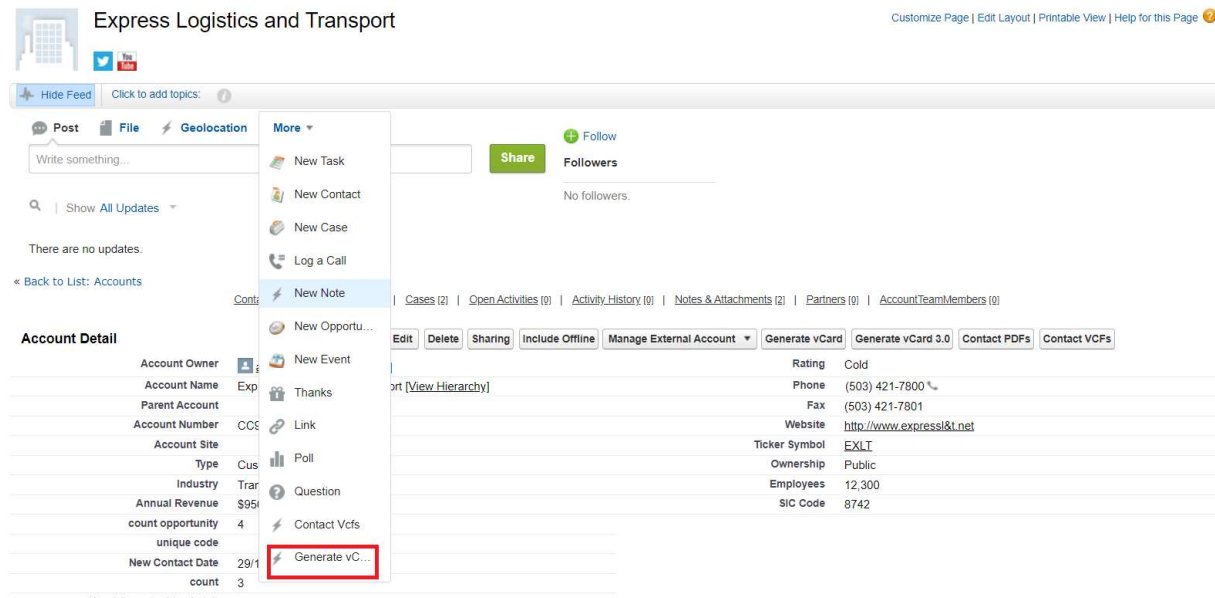
## Point to Remember before importing contacts from vcf file

- The file you are going to import must be a VCF file.
- This VCF file may contain any number of contactts.
- These contacts must be stored and saved one after another in a VCF file and all required information should be present in contacts. Figure 21 includes a sample file.

```
BEGIN:VCARD
VERSION:2.1
N:dsuza;Check
FN:Mr. Check dsuza
ORG:Dickenson plc
TITLE:job1
TEL;WORK;VOICE:(610) 265-9100
TEL;Home;VOICE:
TEL;WORK;FAX:(785) 241-6201
ADR;WORK;;;1301 Hoch Drive;Lawrence;KS;66045;USA
LABEL;WORK;ENCODING=QUOTED-PRINTABLE:1301 Hoch Drive Lawrence KS
66045 USA
ADR;HOME:;;;;;
LABEL;WORK;ENCODING=QUOTED-PRINTABLE:
EMAIL;PREF;INTERNET:
URL;WORK:dickenson-consulting.com
REV:20080424T195243Z
END:VCARD
<br />
BEGIN:VCARD
VERSION:2.1
N:Kukreja;Sam
FN:Ms. Sam Kukreja
ORG:Dickenson plc
TITLE:job2
TEL;WORK;VOICE:(610) 265-9100
TEL;Home;VOICE:
TEL;WORK;FAX:(785) 241-6201
ADR;WORK;;;1301 Hoch Drive;Lawrence;KS;66045;USA
LABEL;WORK;ENCODING=QUOTED-PRINTABLE:1301 Hoch Drive Lawrence KS
66045 USA
ADR;HOME:;;;;;
LABEL;WORK;ENCODING=QUOTED-PRINTABLE:
EMAIL;PREF;INTERNET:
URL;WORK:dickenson-consulting.com
REV:20080424T195243Z
END:VCARD
```

## 7. Generating vCard from Chatter Feeds of Account, Contact and Lead

1. Go on to the detail page of the account/contact/lead
2. In feed area click on More>**Generate vCard**



Express Logistics and Transport

Customize Page | Edit Layout | Printable View | Help for this Page

Hide Feed | Click to add topics:

Post | File | Geolocation | More

Write something...

Show All Updates

There are no updates.

Back to List: Accounts

Account Detail

Account Owner	Exp
Account Name	Exp
Parent Account	Exp
Account Number	CCS
Account Site	Exp
Type	Cus
Industry	Tran
Annual Revenue	\$95
Account opportunity	4
unique code	
New Contact Date	29/1
count	3

More

- New Task
- New Contact
- New Case
- Log a Call
- New Note
- New Opportu...
- New Event
- Thanks
- Link
- Poll
- Question
- Contact Vcfs
- Generate vC...**

Follow

Followers

No followers.

Share

Generate vCard

Generate vCard 3.0

Contact PDFs

Contact VCFs

Rating Cold

Phone (503) 421-7800

Fax (503) 421-7801

Website <http://www.expressl&t.net>

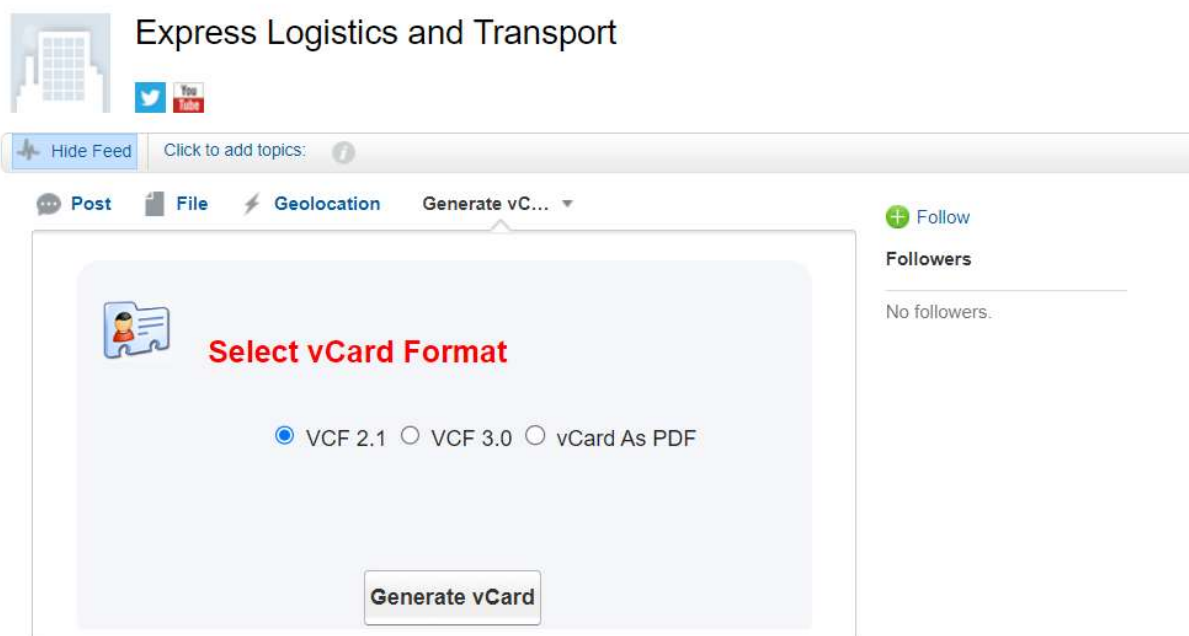
Ticker Symbol EXLT

Ownership Public

Employees 12,300

SIC Code 8742

3. Then select vCard Format and click on **Generate vCard** button



Express Logistics and Transport

Hide Feed | Click to add topics:

Post | File | Geolocation | Generate vC...

Follow

Followers

No followers.

Select vCard Format

☒ VCF 2.1 ☐ VCF 3.0 ☐ vCard As PDF

Generate vCard