



iTools vCard Creator Quick Start Guide

About This Guide

This Quick Start guide is designed for Admin users who have prior experience installing and configuring products from AppExchange. An abbreviated set of instructions is provided to quickly get you set up with iTools vCard Creator. A more complete set of step-by-step instructions and supporting information can be found in the iTools vCard Creator Configuration Guide available on our website or AppExchange listing.

About iTools vCard Creator

With iTools vCard Creator, you can add Salesforce CRM Contacts, Leads, Accounts and Users to Microsoft Outlook, Lotus Notes, and most other Personal Information Managers (PIM) with a single click. In addition to the standard vCard supported contact information fields, you can configure the iTool to include other important data in the vCard Note, such as standard and custom fields, object description fields, and even a link to Salesforce CRM that will display in the PIM.

Before You Begin

The iTools Configuration Manager is the prerequisite package used for licensing and settings management of all iTools, including vCard Creator. The iTools Configuration Manager must be installed and a license assigned to your account in order for you to install and configure iTools vCard Creator.



Installing iTools vCard Creator

1. Begin the installation of **iTools vCard Creator** from AppExchange by using the following link:
<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001g9eQEAQ>
2. Click on **Get It Now**.
3. Follow the standard AppExchange instructions including choosing your environment and verifying the Terms and Conditions of the iTools subscription.
4. When you are prompted to choose the security level, we recommend you select the **Grant access to all users** option, since iTools vCard Creator is valuable to all users.
5. On Step 3 of the Package Installer, click on **Install** to complete the installation. When you have received confirmation that iTools vCard Creator has successfully installed, continue with the next section to configure the iTool for your environment.

Configuring iTools vCard Creator

1. Grant Yourself a License.
 - Click **Setup | View Installed Packages**.
 - In the Installed Packages list, locate **iTools vCard Creator** and click on its **Manage Licenses** link.
 - Click the **Add Users** button at the top of the Licensed Users list.
 - Check the box next to your name and click **Add** at the bottom of the page.
2. Add the vCard Button to your Lead Page Layout
 - Go to **Setup | Customize | Leads** and click the **Page Layouts** link.
 - In the Lead Page Layouts list, click the **Edit** link in the Action column.
 - In the upper left area of the page, select the **Buttons** option.
 - Find the button labeled **vCard** and drag it to the section on the layout labeled **Custom Buttons**.
 - Click the **Save** button.
3. Add the vCard Button to your Account and Contact Page Layouts
 - Follow the same steps for your Account and Contact Page Layouts as you did with the Lead Page Layout in Step 2 above.
4. Add the vCard Link to your User Page Layout
 - Go to **Setup | Customize | User** and click the **Page Layouts** link.
 - In the User Page Layouts list, click the **Edit** link in the Action column.



- In the upper left area of the page, select the **Custom Links** option.
 - Find the link labeled **vCard** and drag it to the section on the layout labeled **Custom Links**.
 - Click the **Save** button.
5. Add iTools Settings for vCard Creator.
- Go to the **iTools Settings** Tab.
 - Click the **Manage iTools** button.
 - In the New iTools section, enter **vcd** into the **iTool Code** field and click the **Add Settings for New iTool** button.
 - Click the **Close** button.

Congratulations!

You have successfully completed the steps required to install and configure iTools vCard Creator. Keep reading for tips and information for a successful deployment of iTools vCard Creator.



Tips and Information for a Successful iTools Deployment

Licensing iTools vCard Creator

In order for other users to view the iTools vCard Creator button and add a Lead, Account, Contact or User to their PIM, the iTools vCard Creator licenses must be allocated. Like all other iTools, a license to the iTools Configuration Manager package is required for each user as well. Your organization receives one Configuration Manager license for each iTools subscription it purchases. Users that have not been assigned a Configuration Manager license may see the vCard button but it will not operate correctly. For further detail regarding license allocation and management, refer to the iTools vCard Creator Configuration Guide.

Learn More about iTools vCard Creator

- The iTools vCard Creator Configuration Guide provides step by step instructions, including screenshots, examples and explanatory text, for a more complete understanding of the features available. Please download and refer to the document to learn how to fully customize the iTool for your organization.
- Additional information can be found on our website at <http://www.insitusoftware.com> and our Get Satisfaction powered Community forum at <http://getsatisfaction.com/insitusoftware>
- Have a comment, suggestion or question? Email us at support@insitusoftware.com.

Explore other iTools in the Collection

- Learn more about each iTool and see how they can make a difference in your organization.
- Visit the AppExchange to install and explore any or all iTools including:
 - iTools Customizable Account Hierarchy
 - iTools Delegated Tasks Management
 - iTools Employment Change Management
 - iTools File Cabinet
 - iTools State/Country Validation