

iTools

vCard Creator



Configuration Guide

Last Revised: October 25, 2018



Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools Employment Change Management.

About iTools vCard Creator

The iTools vCard Creator lets you add Salesforce.com Contacts, Leads, Accounts and Users to Microsoft Outlook or other contact manager with a single click. The vCard Creator creates an e-business card using the standard vCard format based on version 2.1 of the vCard specification as defined by the versit Consortium on September 18, 1996. The vCard creator supports Microsoft Outlook and Google Contacts and any other contact manager that accepts vCard format.

iTools vCard Creator adds an iTool custom button (Contact, Lead or Account) or custom link (User) to the object detail page. In addition to the standard vCard supported contact information fields, system administrators can configure this iTool to include other important data in the vCard Note. Customization options include adding standard and custom field information, object description fields, and even a link to Salesforce.com that will display in the contact manager.

Lightning Support

The iTools vCard Creator fully supports the Salesforce.com Lightning user interface as well as the Classic user interface. All the user interface components have been designed to style themselves based on the user interface of the current user. This means you can easily use iTools in an all Classic org, an all Lightning org, or one with some users using Classic and some using Lightning. iTools will even support those users that switch between user interfaces depending on their task.



Installation and Configuration Overview

This guide is designed to lead you through the necessary installation and configuration steps for iTools vCard Creator. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are three basic parts to the process. To begin, this guide shows how to install the iTools vCard Creator into your Salesforce environment. Second, it leads you through the process of deploying and configuring iTools vCard Creator and each of its' feature sets. You do not have to activate and configure every feature of the tool so some sections in this portion of the guide can be skipped. Finally, this guide explains how to properly apply vCard Creator licensing. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the *Help and Support* section at the end of this document.



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Before You Begin

iTools are designed for use with Salesforce.com Professional, Developer, Enterprise, Unlimited, and Performance editions and their sandboxes. Installation into any other edition, including Team and Group Editions, is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools vCard Creator into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 5.0 or higher must be installed and a license assigned to your account.

Periodically Salesforce will change the user interface to improve the usability of the Salesforce application or the AppExchange marketplace. Many times, these changes only take effect when you enable an option in the **User Interface** section of Setup. This guide will attempt to reference navigational steps and screen shots using the latest version of the Salesforce user interface. There will be times, however, when Salesforce releases a new interface before a new version of this guide is released. There will also be cases when this guide references a version of the user interface that you have not enabled in your Salesforce environment. If you encounter a situation where you are unable to translate any of these differences, please contact our support organization and they will be more than happy to assist you.



Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 5.0 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools Configuration Manager** by searching for “iTools Configuration Manager” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS>

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.



If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool’s AppExchange listing or on our website at <https://www.insitusoftware.com/itools-documentation>



Installing iTools vCard Creator

iTools vCard Creator can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools vCard Creator** by searching for “iTools vCard Creator” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001g9eQEAQ>

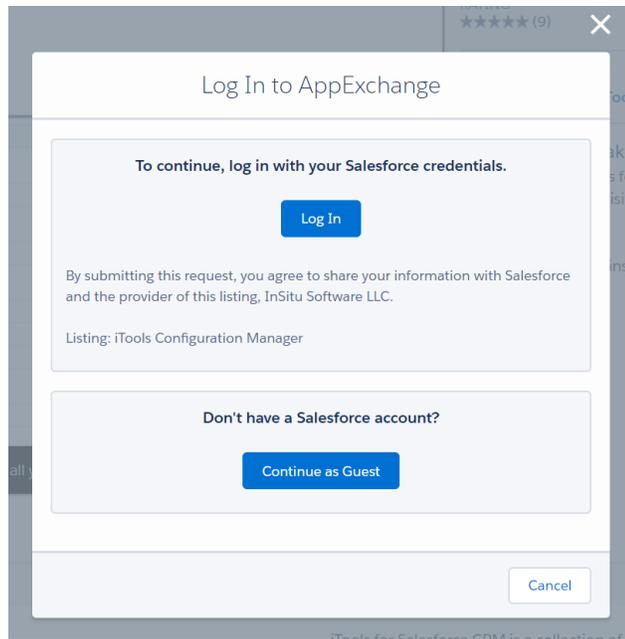


Make sure you are on the AppExchange listing for the **iTools vCard Creator**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.



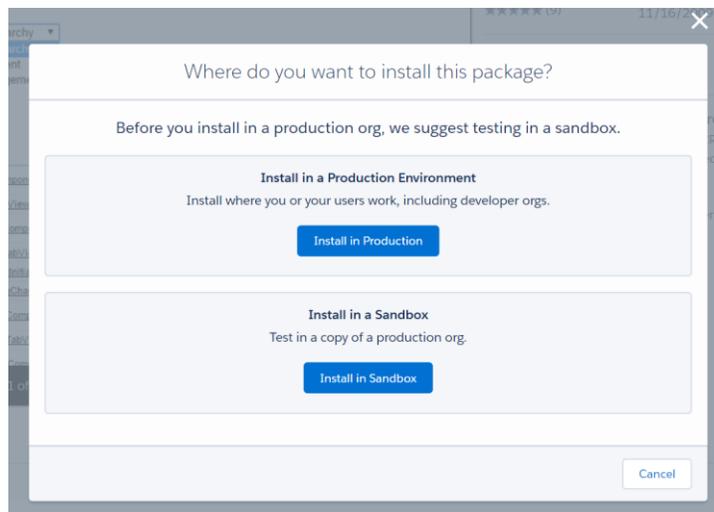
If you accessed the AppExchange from the [AppExchange Marketplace](#) link in the Setup section of Salesforce.com and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the install will be the same.

3. Click the **Get It Now** button.
4. If you have not already logged into the AppExchange, you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



After logging in you may be returned to the iTools vCard Creator listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools vCard Creator into a Production or Sandbox Environment. iTools will work properly in either environment.



If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.



- The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.

Confirm Installation Details

Review the [customization guide](#) for installation and configuration steps.

Package	Version
iTools vCard Creator (3.0 / 3.0.0)	3.0 / 3.0.0
Subscription	Organization
Free	InSitu Software
Duration	Number of Subscribers
Does Not Expire	10000 Subscribers
Username	
docadmin@insitusoftware.com	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Bob	* Company	InSitu Software
* Last Name	Nagy	* Country	United States
* Job Title	Co-Founder	* State/Province	Illinois
* Email	development@insitusoftware.com		
Phone			

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)

- Choose the initial access to package resources.

For users to be able to use iTools vCard Creator they must be granted permission to access the custom objects, Apex classes, and Visualforce pages that make up the application. Since none of the resources associated with the iTools vCard Creator will be available to your users until they are granted an iTools vCard Creator licenses we recommend you choose the **Install for All Users** option.



The screenshot shows a configuration window with three radio button options for user access:

- Install for Admins Only
- Install for All Users
- Install for Specific Profiles...

At the bottom right, there are two buttons: **Install** and **Cancel**.



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools vCard Creator is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The install of the iTools vCard Creator package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the install requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.



If you did not install the iTools Configuration Manager version 5.0 or greater before attempting to install iTools vCard Creator, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

(iTools Configuration Manager 5.0) A required package is missing Package "iTools Configuration Manager", Version 5.0 or later must be installed first.



Granting Users Access

The Salesforce package installation routine automatically grants you, the administrator, the privileges and licenses needed to access all the features of the vCard Creator tool. However, for other users to access the iTools vCard Creator features, you will need to make sure they 1) have access to the proper package resources and 2) have been allocated licenses to the proper iTools packages. You can grant this access now or wait until you have activated and configured the features of the tool you wish to employ at your organization.

Package Resource Access

Before any user can access the tabs, custom objects, custom fields, code, or pages owned by an installed package they must first be granted the proper access to those resources. This access can be granted either by updating each of the account profiles used by your iTools users or by creating and assigning a Permission Set to the appropriate users. If during the installation wizard you chose the **Install for All Users** or the **Install for Specific Profiles** option or you are using the Professional Edition of Salesforce.com, your editable account profiles were automatically updated to grant full access to all the iTools Employment Change Management resources.

If you chose **Install for Admin Only** during the installation, then you will need to create a Permission Set which grants the appropriate resource access and apply that Permission Set to your iTools users.



If you need to create a Permission Set for iTools vCard access please contact InSitu Software Technical Support for details regarding which resources your users will need access to.

Package Licenses

Each user of iTools vCard Creator must be assigned a license to **both** the iTools Configuration Manager and iTools vCard Creator packages. If you are not intending to license iTools for all your Salesforce users, please refer to the *Licensing* section of this guide for more information regarding the impact of non-licensed users on each feature of the vCard Creator package.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required package licenses is to use the **Managed Packages** section of the User detail page. This section lists the currently applied licenses and



includes an **Assign Licenses** button for accessing the administrative page used to apply (or remove) other managed package licenses.

Managed Packages		Assign Licenses
Action	Package Name	
Remove	iTools Employment Change Management	
Remove	iTools vCard Creator	

However, if you are deploying the vCard Creator tool to a significant number of users, you will find it easier to mass assign licenses from the license management page of each iTools package. To access this page for any managed package, locate the **Installed Packages** section in Setup and click on the [Manage Licenses](#) link in the Action column next to the package whose licenses you wish to allocate.

Installed Packages		
Action	Package Name	Publisher
Uninstall Manage Licenses	iTools Employment Change Management Description Automatically create employment history, alert opportunity owners, keep tasks and events from	InSitu Software LLC
Uninstall Manage Licenses	iTools Configuration Manager Description Manages the configuration and settings for all of the InSitu Software iTools for Salesforce CRM	InSitu Software LLC
Uninstall Manage Licenses	iTools Delegated Tasks Management Description Manage and track the tasks you have delegated to others more efficiently. Includes task comple	InSitu Software LLC
Uninstall Manage Licenses	iTools vCard Creator Description Add Salesforce CRM Contacts, Leads, Accounts and Users to Outlook or other vCard enabled	InSitu Software LLC

From this page you can see all users already assigned a license to the package as well as add additional users using the **Add Users** button.



If you have installed iTools in a sandbox org, there is no license control and all users are automatically assigned a license to every managed package. If you need to test the impact of iTools on unlicensed users, please contact InSitu Software Technical Support and request that license control be enabled in your sandbox.



iTools Settings

All iTools, including vCard Creator, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

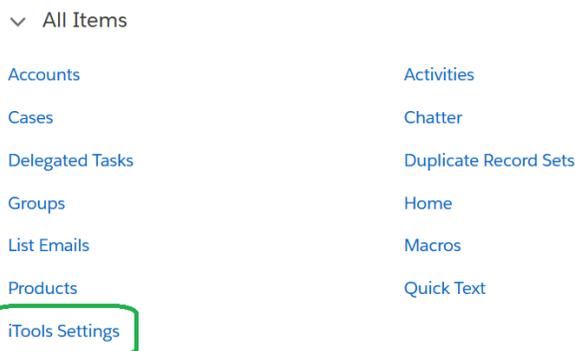
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of vCard Creator. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

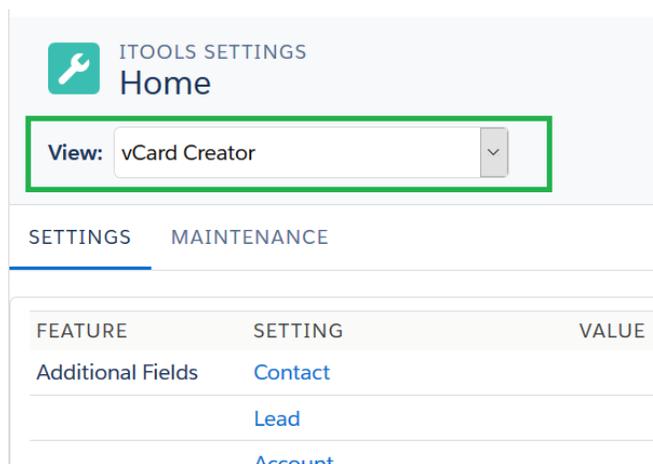
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the “nine dot” icon  in the top left of any page.
2. Click the iTools Settings option in the All Items section



3. Select “vCard Creator” in the View dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.

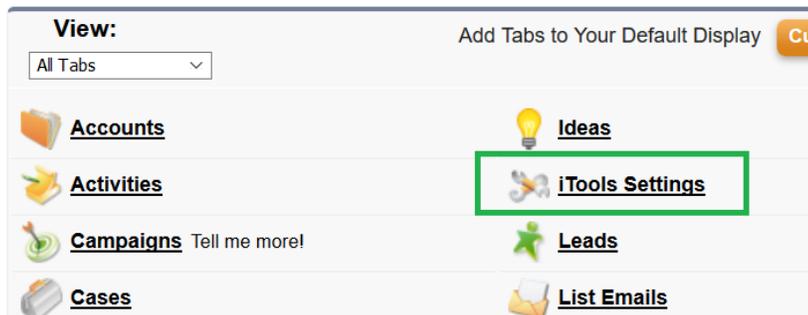


If you are using the Classic User Interface

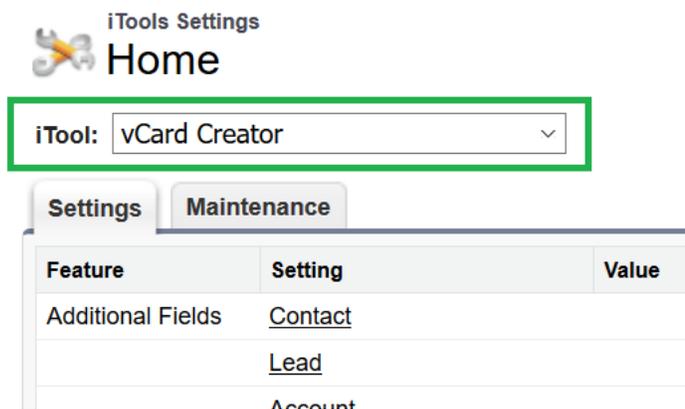
1. Click the “plus” tab  at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs

All Tabs

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) better suit the way you work.



3. Select “vCard Creator” in the iTool dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.



Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.



Feature: Contact vCard Button

A Contact is downloaded as a vCard file by clicking on the **vCard** button at the top of the contact detail page. This button was added to your Salesforce.com environment by the install process but is not available to users until it is added to the Contact Page Layout(s). If you want iTools users to be able to easily add contacts to their contact manager, you will need to follow these simple steps.

1. Navigate to the Page Layout editor for the Contact page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Contact** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

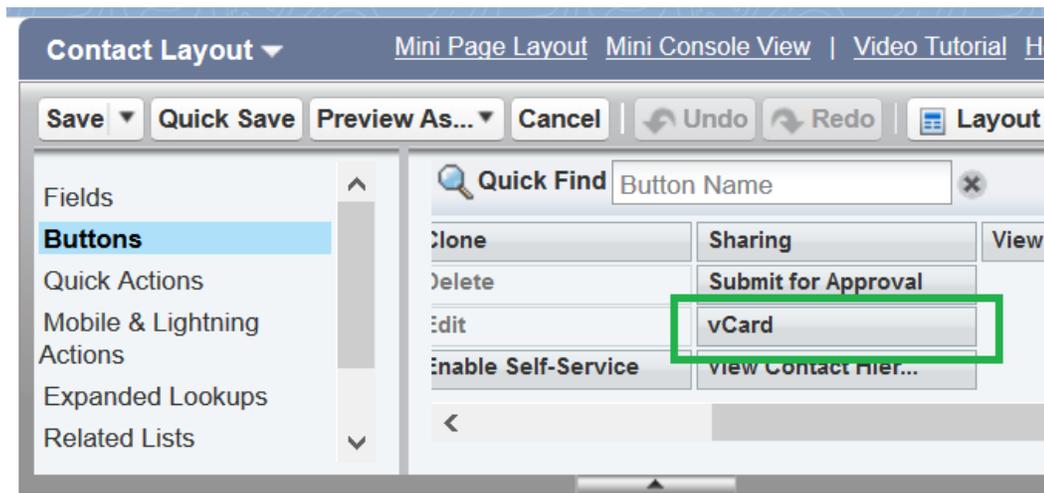
Setup > Customize > Contacts > Contact Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Professional Edition supports only one page layout per object.

2. Locate **vCard** button in Buttons list at the top of the page.



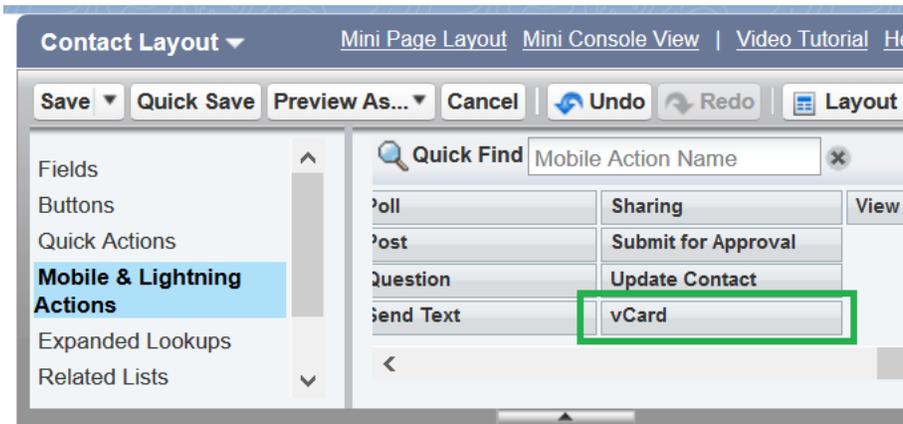


3. Drag the button to the Custom Buttons section of the page layout.

Contact Detail



4. Locate the **vCard** action in the Mobile & Lightning Actions list at the top of the page.

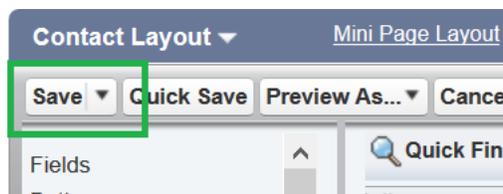


5. Drag the action to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Salesforce Mobile and Lightning Experience Actions i



6. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Contact Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Contact Page Layout.



Feature: Lead vCard Button

A Lead is downloaded as a vCard file by clicking on the **vCard** button at the top of the lead detail page. This button was added to your Salesforce.com environment by the install process but is not available to users until it is added to the Lead Page Layout(s). If you want iTools users to be able to easily add leads to their contact manager, you will need to follow these simple steps.

1. Navigate to the Page Layout editor for the Lead page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Lead** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

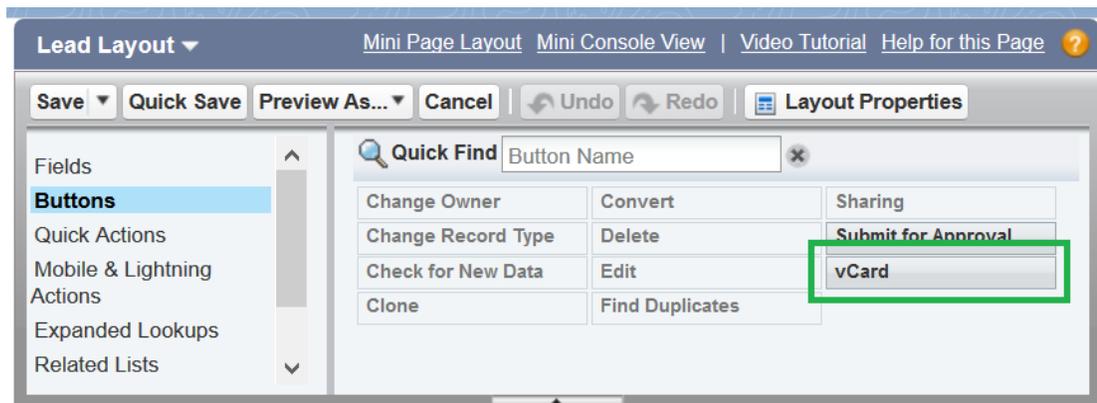
Setup > Customize > Leads > Lead Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate **vCard** button in Buttons list at the top of the page.



3. Drag the button to the Custom Buttons section of the page layout.

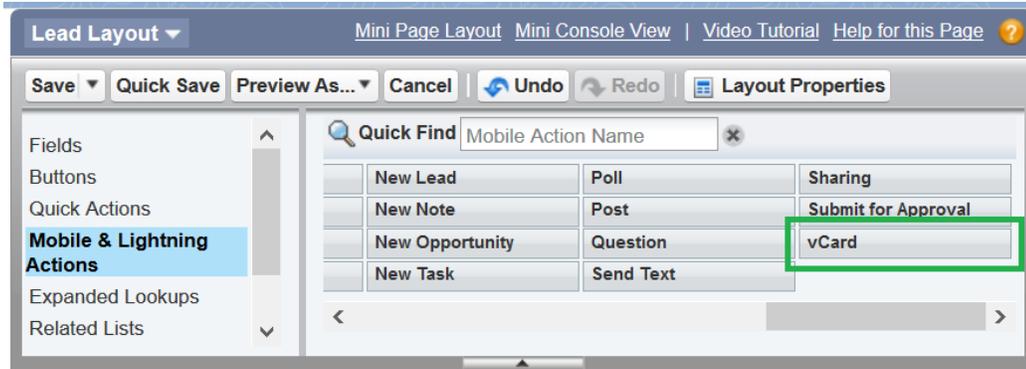


Lead Detail

Standard Buttons: **Edit** **Delete** **Change Owner** **Convert**

Custom Buttons: **vCard**

4. Locate the **vCard** action in the Mobile & Lightning Actions list at the top of the page.

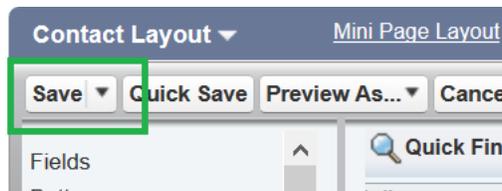


5. Drag the action to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Salesforce Mobile and Lightning Experience Actions i



6. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Lead Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Lead Page Layout.



Feature: Account vCard Button

An Account is downloaded as a vCard file by clicking on the **vCard** button at the top of the account detail page. This button was added to your Salesforce.com environment by the install process but is not available to users until it is added to the Account Page Layout(s). If you want iTools users to be able to easily add accounts to their contact manager, you will need to follow these simple steps.

1. Navigate to the Page Layout editor for the Lead page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **Account** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

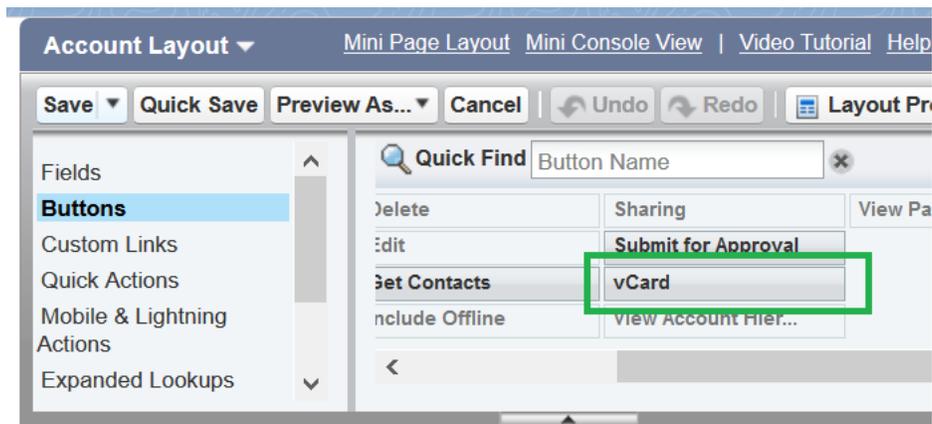
Setup > Customize > Accounts > Account Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Professional Edition supports only one page layout per object.

2. Locate **vCard** button in Buttons list at the top of the page.



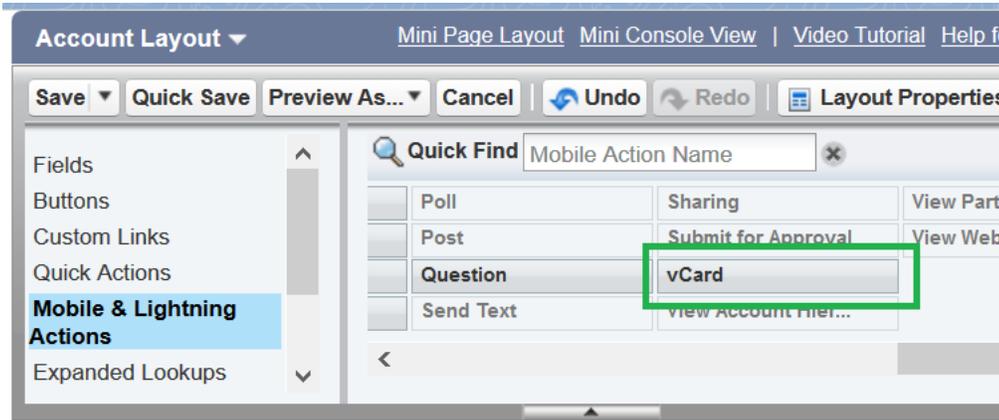
3. Drag the button to the Custom Buttons section of the page layout.



Account Detail

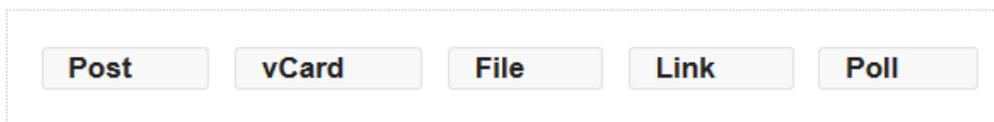


4. Locate the **vCard** action in the Mobile & Lightning Actions list at the top of the page.

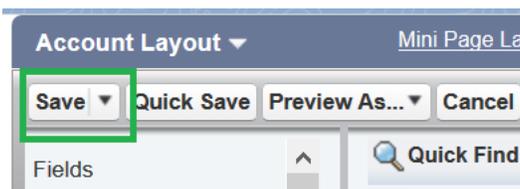


5. Drag the action to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

Salesforce Mobile and Lightning Experience Actions i



6. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Account Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Account Page Layout.



Feature: User vCard Link

A User is downloaded as a vCard by clicking on the **vCard** link at the bottom of the user detail page. This link was added to your Salesforce.com environment by the install process but is not available to users until it is added to the User Page Layout(s). If you want iTools users to be able to easily add Users to their contact manager, you will need to follow these simple steps.

1. Navigate to the Page Layout editor for the Lead page

Lightning:

Setup > Objects and Fields > Object Manager >

Click the **User** link in the list > **Page Layouts >**

Click the  icon in the last column of the layout to update >

Edit

Classic:

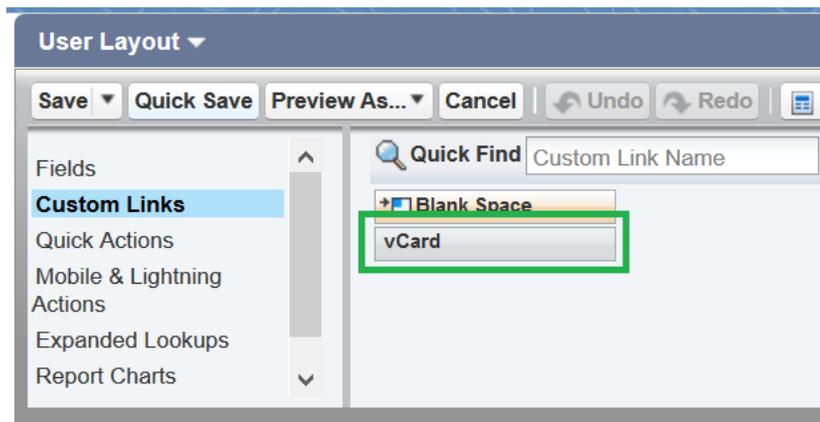
Setup > Customize > Users > User Page Layouts >

Click on the **Edit** link next to the layout to update



If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate **vCard** button in Custom Links list at the top of the page.



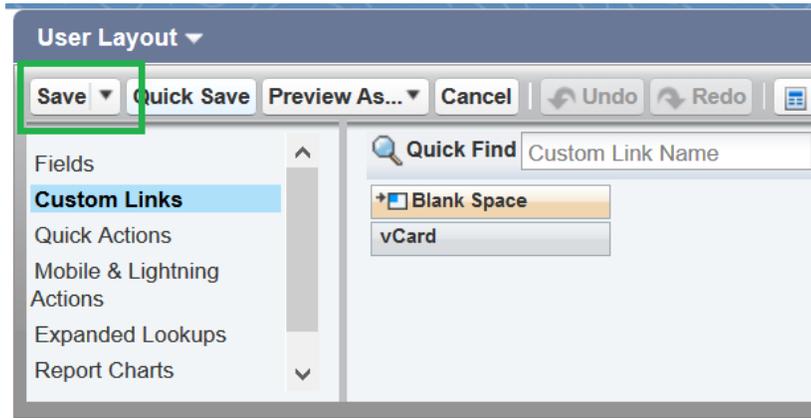
3. Drag the link to the Custom Links section of the page layout.



Custom Links (Header visible on detail only)

vCard

4. Click on the **Save** button at the top of the page to save your changes.



If you have more than one User Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single User Page Layout.



Configuration Options

All iTools, including vCard Creator, include a set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab. The complete set of configuration options for vCard Creator are as follows:

Contact

This setting specifies the additional fields from the Salesforce.com Contact object to be included in the Notes field of the contact vCard. With this setting, you can include important contact information such as Assistant's Name and Assistant's Phone Number that would otherwise not be included since these fields are currently excluded from the standard vCard mapping. This is an optional Field List setting and can be left blank.

As an example, to include the Assistant Name and Phone number, configure your **Contact** setting as follows:

ACTION	LABEL	FIELD NAME	SORT ORDER
Edit Del	Asst. Name	assistantname	10
Edit Del	Asst. Phone	assistantphone	20

Here is how the assistant information will appear in the vCard notes:

Asst. Name: Alfred Pennyworth
Asst. Phone: (312) 596-1231
Salesforce.com Link:
<https://na1.salesforce.com/0038000>



Lead

This setting specifies the additional fields from the Salesforce.com Lead object to be included in the Notes field of the Lead vCard. This setting behaves in the same manner as the **Contact** setting does for contact vCards. This is an optional Field List setting and can be left blank.

Account

This setting specifies the additional fields from the Salesforce.com Account object to be included in the Notes field of the Account vCard. This setting behaves in the same manner as the **Contact** setting does for contact vCards. This is an optional Field List setting and can be left blank.

User

This setting specifies the additional fields from the Salesforce.com User object to be included in the Notes field of the User vCard. This setting behaves in the same manner as the **Contact** setting does for contact vCards. This is an optional Field List setting and can be left blank.

PageCharset

Specifies the character set to be used when generating the vCard file. Any character set registered with the Internet Assigned Numbers Authority (IANA) can be specified by this property parameter. For example, ISO 8859-1 or the Latin 1 set is specified by:

```
CHARSET=ISO-8859-1
```

The character set specified must be the same one used by your instance of Salesforce.com so unless instructed by InSitu Software technical support, you should leave this setting with its default value.

PropertyParameter

This setting allows you to specify one or more vCard property level parameters to be used on each property in the generation of the vCard file. Property level parameters are generally not required. This setting is provided to ensure compliance with the vCard specification. You should leave this setting blank unless told to do otherwise by InSitu Software technical support.



AddressLabel

Specifies the display format of the Address (LABEL property). Possible values are:

{!None} - Do not apply a standard format. Use format as defined in Salesforce record.

{!Default} - Apply the standard US based format.

custom – Use the `{!City}` `{!Country}` `{!State}` `{!Street}` `{!PostalCode}` tokens and newline character (`\n`) to define a custom address format. For example: `{!Street}\n{!City}, {!State}\n{!PostalCode}\n{!Country}`

SetMobileAsBusiness

Indicates if the Mobile phone number should be mapped to the Business Phone field in the vCard if the Business Phone in Salesforce.com is blank.

SFDCLink

Indicates if a link to the original Salesforce.com object should be included in the vCard Note field.

The screenshot shows a Salesforce contact record for Alfred Pennyworth. The 'Salesforce.com Link' field is highlighted with a red box, containing the URL: <https://na1.salesforce.com/0038000000bWHFkAAO>. Other fields visible include 'Asst. Name: Alfred Pennyworth', 'Asst. Phone: (312) 596-1231', and several phone numbers in the left sidebar.

This link makes it easy for users to go directly to the complete details of the contact back in Salesforce.com.



If your organization's contact manager does not render a URL as an actionable hyperlink, then the link should not be included.



Description

Indicates if the value in the Salesforce.com object's description field should be included in the vCard Note field.



If your organization has a process that populates the description field with information that is not valuable or desirable for users to have in their personal contact managers, then you should consider selecting **N(o)** as the setting value.



Licensing

iTools vCard Creator uses the Salesforce.com package licensing mechanism to control which users have access to its functionality. A user will have proper access to all the vCard Creator features only if they have been assigned a license to **both** iTools vCard Creator **and** the iTools Configuration Manager.

Assignment of the vCard Creator licenses determines which users will see vCard button(s) on the object detail pages. Users who do not have a vCard Creator license assigned to their account simply do not see the buttons. Your organization was given a large number of vCard Creator licenses when the package was installed. This number is not necessarily the number of users that can be granted full vCard Creator functionality because the tool also requires the assignment of an iTools Configuration Manager license.

A license to the iTools Configuration Manager package is required for a user to have access to the iTools vCard Creator features as well as all other iTools. Your organization receives one Configuration Manager license for every iTools subscription it purchases. **A user should never be assigned a license to the iTools vCard Creator package without also being assigned a license to the iTools Configuration Manager package.** Without an iTools Configuration Manager license, a user will be able to see the vCard button(s) but accessing them will generate errors and/or result in unexpected system behavior that will only cause confusion.

InSitu Software uses the multiple package license approach to make it possible for customers to purchase iTools subscriptions for many, but not all their users. While we believe an iTools subscription for all Salesforce users is a valuable investment, we understand that such a decision is best left to the organization itself.

It is important for you, the System Administrator, to understand the impact license allocation and management will have on your users and their overall experience with iTools vCard Creator. The information in the following sections should help with that understanding.

Contact vCard Button

Users that do not have a vCard Creator license

- Will not be able to see the vCard button on the Contact Detail page.

Users that have a vCard Creator licenses but do not have a Configuration Manager license

- Will see the vCard button on the Contact detail page but if they click the button they will get the following error:

No License: You are not currently licensed for the iTools Configuration Manager. You must be licensed for the iTools Configuration Manager before you can use the iTools vCard Creator. Contact your Salesforce.com administrator for assistance.



Lead vCard Button

Users that do not have a vCard Creator license

- Will not be able to see the vCard button on the Lead Detail page.

Users that have a vCard Creator licenses but do not have a Configuration Manager license

- Will see the vCard button on the Lead detail page but if they click the button they will get the following error:

No License: You are not currently licensed for the iTools Configuration Manager. You must be licensed for the iTools Configuration Manager before you can use the iTools vCard Creator. Contact your Salesforce.com administrator for assistance.

Account vCard Button

Users that do not have a vCard Creator license

- Will not be able to see the vCard button on the Account Detail page.

Users that have a vCard Creator licenses but do not have a Configuration Manager license

- Will see the vCard button on the Account detail page but if they click the button they will get the following error:

No License: You are not currently licensed for the iTools Configuration Manager. You must be licensed for the iTools Configuration Manager before you can use the iTools vCard Creator. Contact your Salesforce.com administrator for assistance.

User vCard Link

Users that do not have a vCard Creator license

- Will not be able to see the vCard link on the User Detail page.

Users that have a vCard Creator licenses but do not have a Configuration Manager license

- Will see the vCard link on the User detail page but if they click the button they will get the following error:

No License: You are not currently licensed for the iTools Configuration Manager. You must be licensed for the iTools Configuration Manager before you can use the iTools vCard Creator. Contact your Salesforce.com administrator for assistance.



Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.



Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time



Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST