USER GUIDE · VERSION 1

vKad name card

A shareable digital card for staff and management, linking to catalogue, booking and feedback.

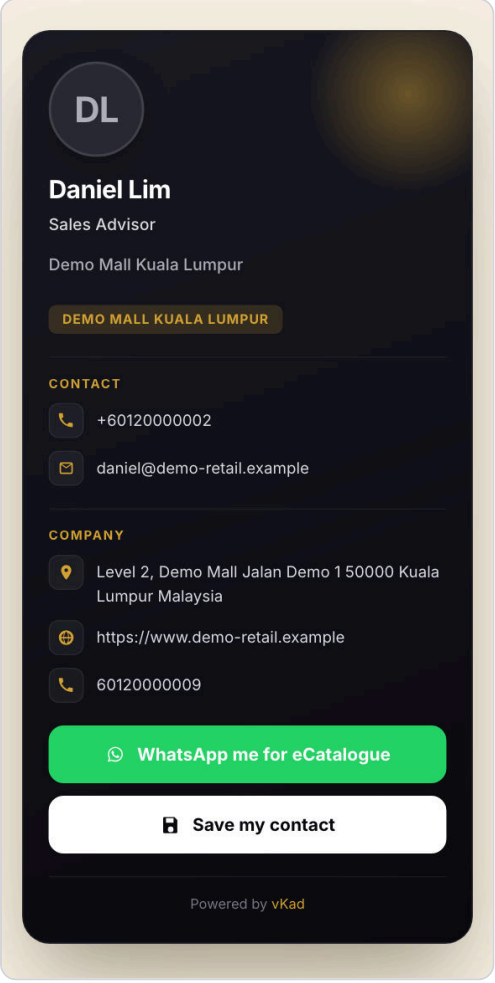
1. What vKad is for
2. Add your company details
3. Create your card
4. Share your card
5. Change your card
6. Link an NFC card
7. See who asked for your catalogue
8. Add people to your account
9. Make cards for many staff at once

What vKad is for

For: Everyone

vKad gives each salesperson or manager a digital name card: a web page with their name, job title, phone, email, company address and website. Customers open it by scanning a QR code, tapping an NFC card (a card with a chip that opens a link when held against a phone) or following a link. From the card a customer can save the person's contact to their phone, or ask for the product catalogue on WhatsApp. Each catalogue request shows up as a lead (a customer who asked to hear from you) in the **Leads** list.

The screen names four roles. **Account User** makes and shares their own cards and sees their own leads. **Account Admin** can also add people, import cards for many staff at once and see everyone's leads. **Account Owner** can do all of that and manages the plan under **Billing & Plan**. **Account Finance** sees billing and can view cards, but cannot make them.



What vKad needs:

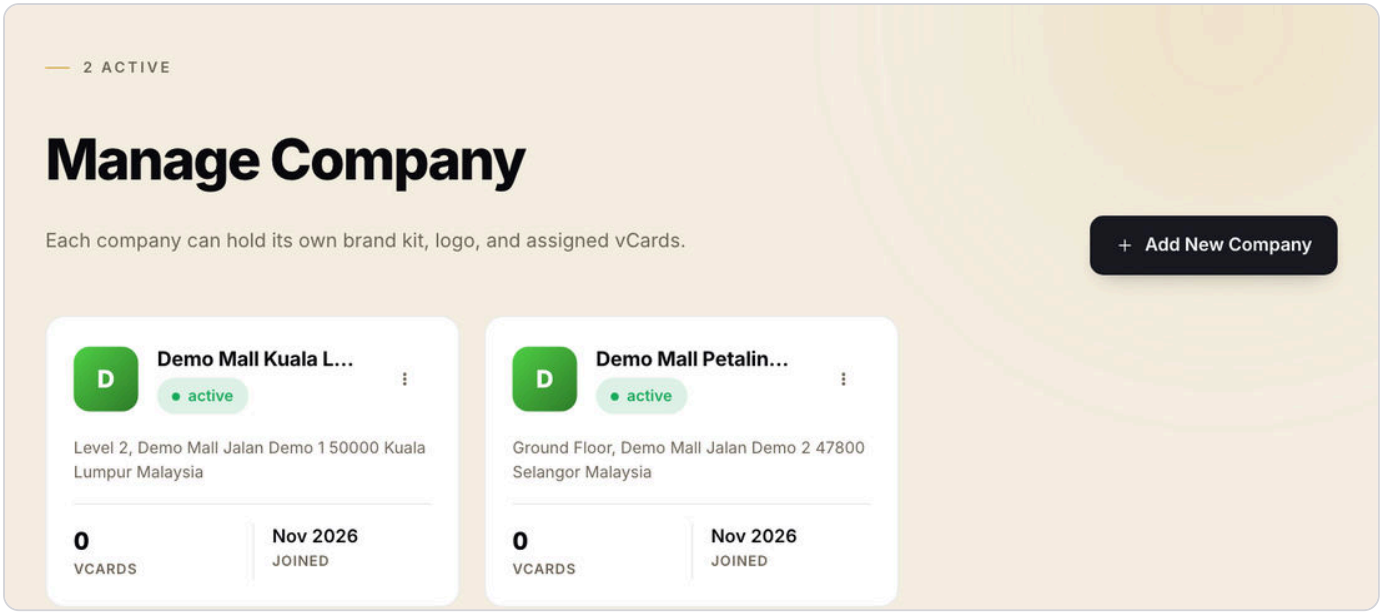
- You sign in with your IDS account (your phone number and password). Someone with **Account Owner** or **Account Admin** must invite you first.
- Your account needs an active plan. The plan sets how many cards you can make; the number shows at the top of **My vCards** (for example "0 / 15 vCards"). Without an active plan, vKad sends you to a payment page instead of letting you create cards.
- Sending the catalogue on WhatsApp uses an outside messaging service that your company's administrator sets up. If it is not set up, requests are still listed under **Leads**, but no WhatsApp message goes out.

Add your company details

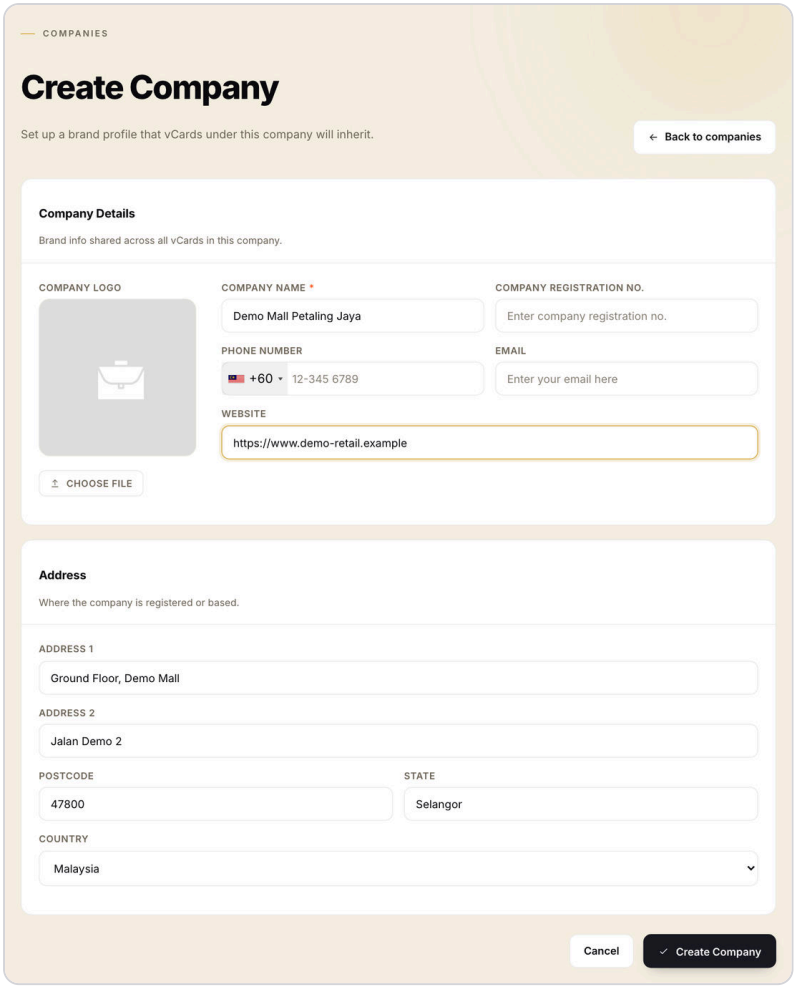
For: Account Owner, Account Admin, Account User

Every card must belong to a company. The company gives the card its address, website and logo, so you type them once and every card under that company shows them. Check here first: your company may already be set up.

1. Open **Companies** in the menu on the left. You see one tile per company.
2. If your outlet or company is missing, press **Add New Company**.



3. Fill in **Company Name**. It is the only field you must fill.
4. Add the rest if you have it: **Company Logo** (press **Choose file**), **Phone Number**, **Email**, **Website**, and the address under **Address**.
5. Press **Create Company** at the bottom.

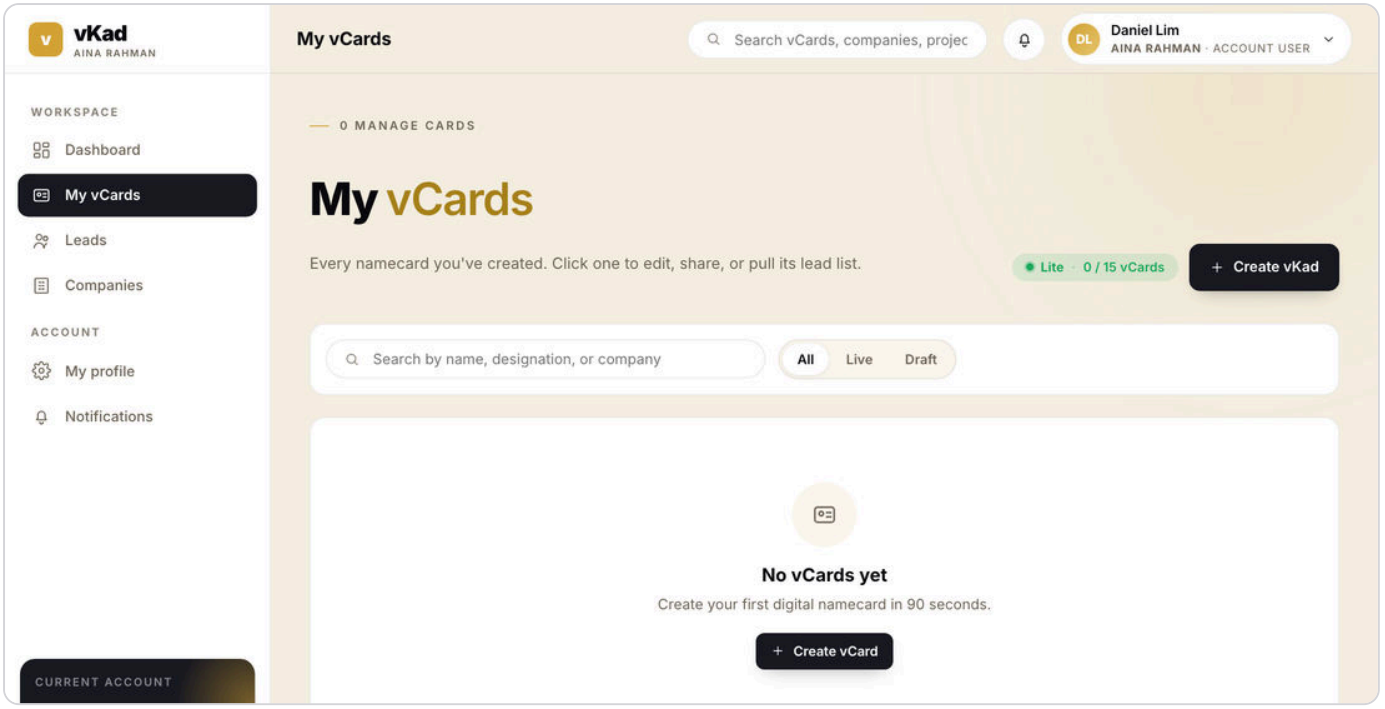


The address and website you enter here show on every card that uses this company. To change them later, press the three dots on the company's tile and choose **Edit**.

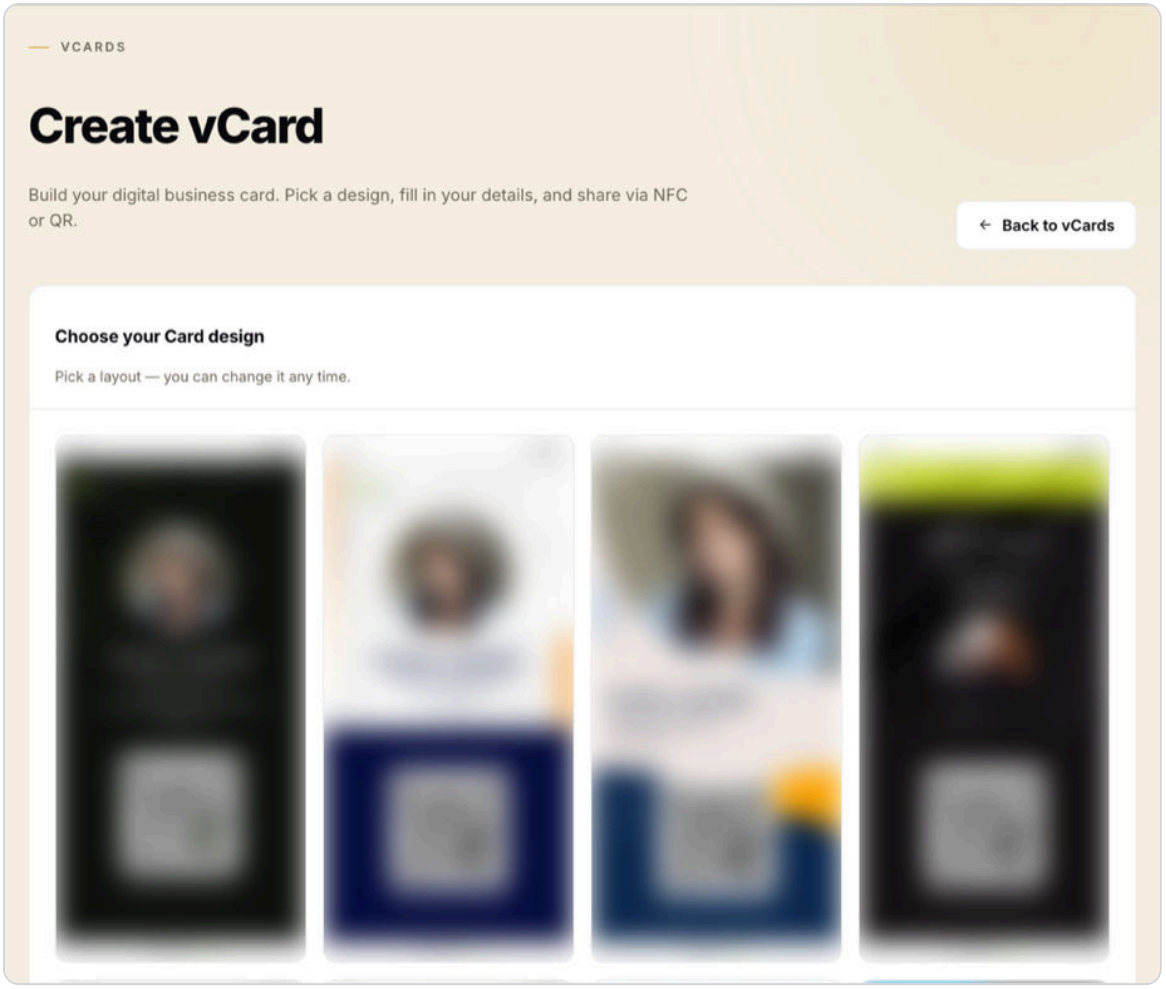
Create your card

For: Account Owner, Account Admin, Account User

1. Open **My vCards** in the menu on the left.
2. Press **Create vKad** at the top right (or **Create vCard** in the middle if you have no cards yet).

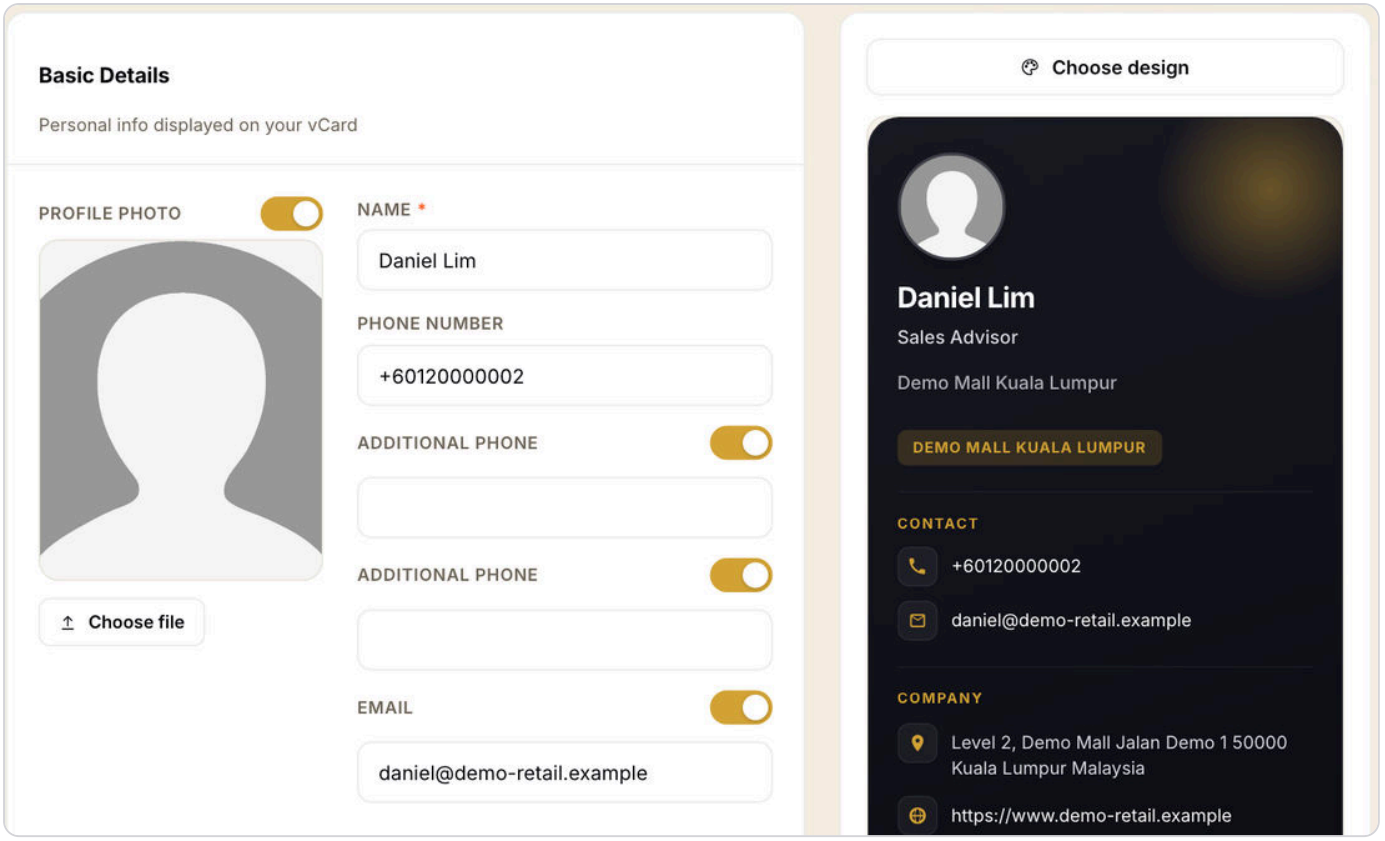


3. Pick a design by pressing on it. You can change it later.

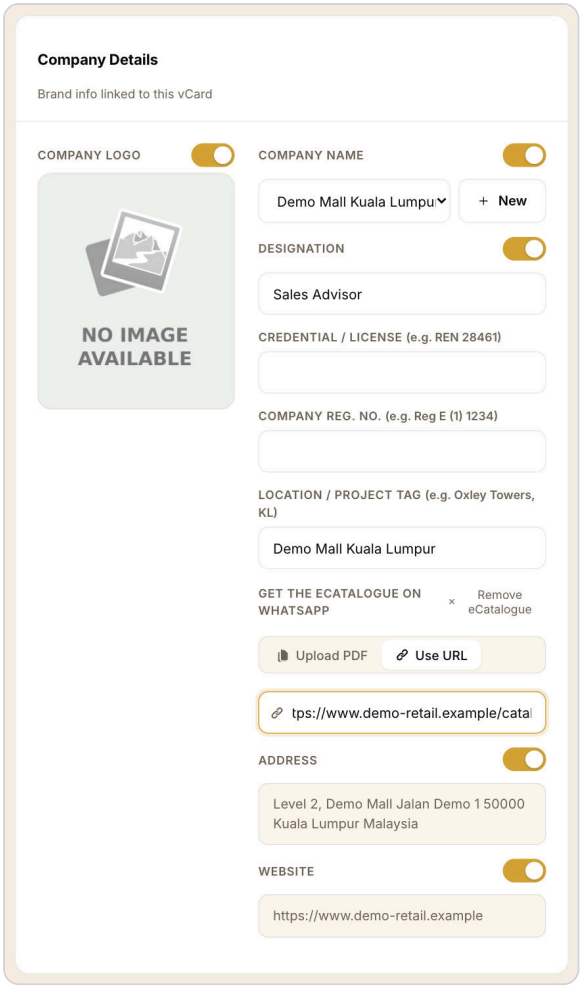


4. Under **Basic Details**, fill in **Name** and **Phone Number**. Type the phone number with the country code and digits only, no spaces or dashes: +60120000002.
5. Fill in **Email** if you want it on the card. Use a real address: vKad checks that the part after the @ exists, and refuses the card if it does not.
6. To add a photo, press **Choose file**. The example here has no photo, so the card shows the person's initials.
7. Each switch next to a field shows or hides that field on the card. Leave a switch on to show the field.

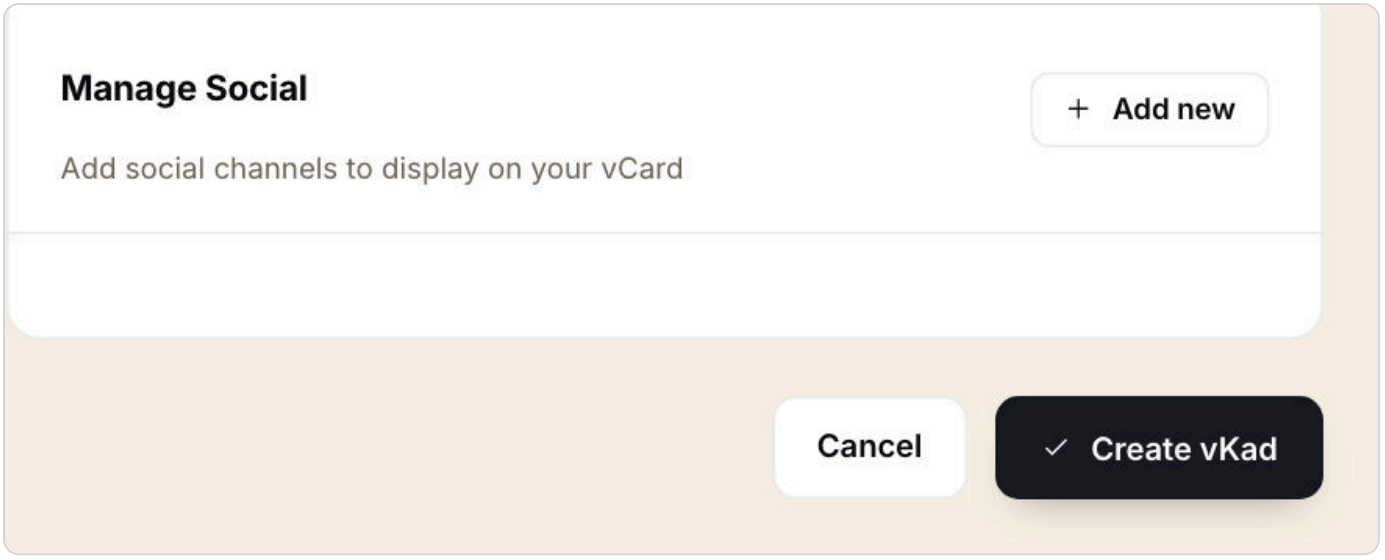
The card on the right updates as you type, so you can see what customers will see.



8. Under **Company Details**, choose your company from the **Company Name** list. If it is not there, press **New** to add it on the spot. The address and website fill in from the company.
9. Fill in **Designation** (your job title). **Credential / License**, **Company Reg. No.** and **Location / Project Tag** are optional; the tag shows as a small label on the card.
10. To let customers ask for your catalogue on WhatsApp, go to **Get the eCatalogue on WhatsApp**. Press **Upload PDF** to add a PDF file, or **Use URL** to paste a link to one. A link must end in .pdf.



11. Under **Manage Social** you can press **Add new** to put social media links on the card.
12. Press **Create vKad** at the bottom.



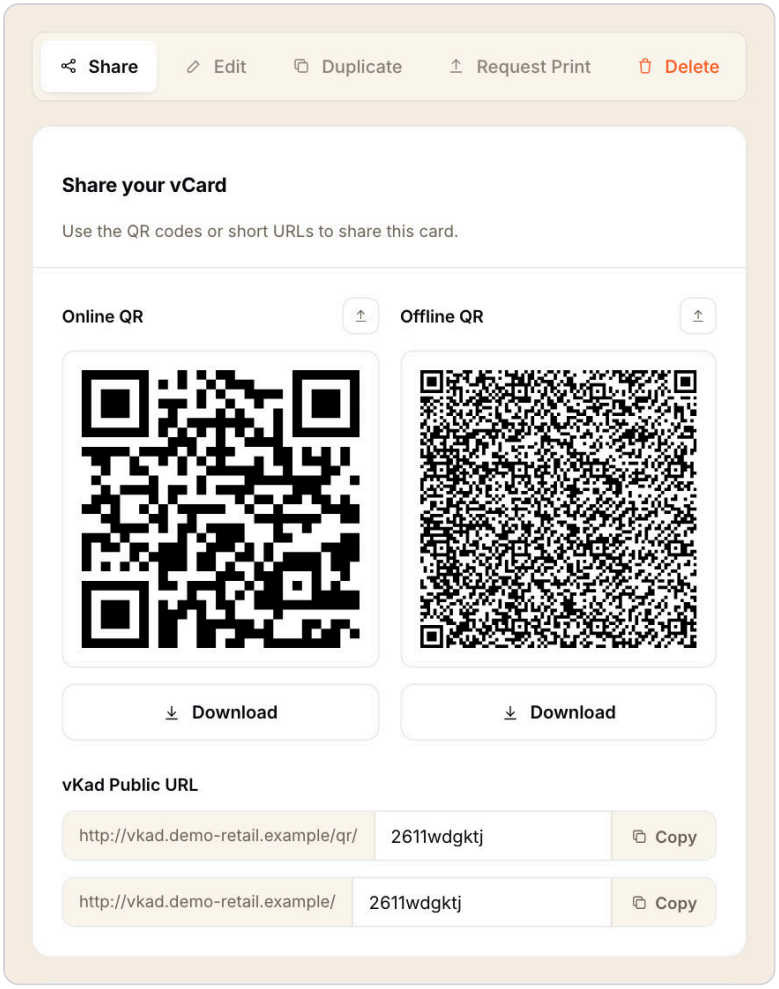
vKad opens the new card's **Manage Card** page, where you can share it straight away.

If your account has used up its card limit, vKad says "You have reached the maximum number of vKad cards for your plan." Ask your **Account Owner** to raise the plan.

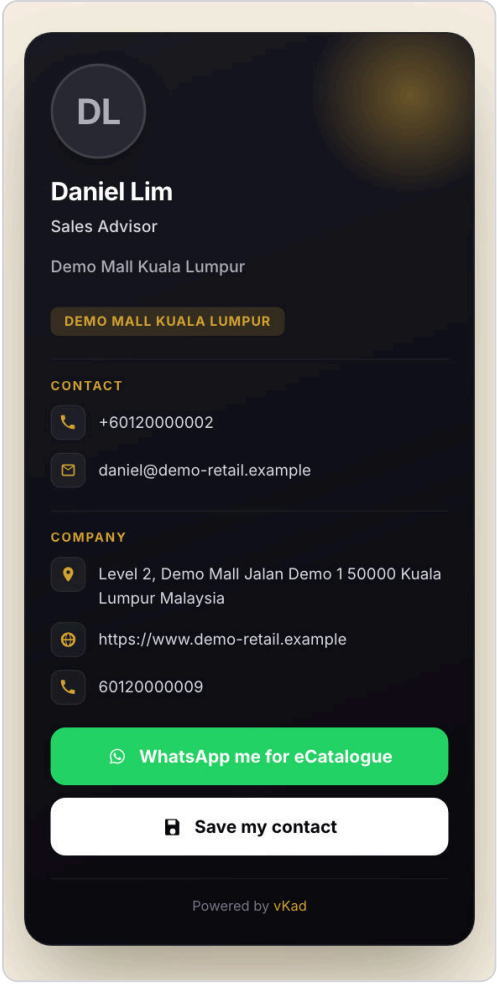
Share your card

For: Account Owner, Account Admin, Account User

1. Open **My vCards** and press your card. The **Manage Card** page opens on the **Share** tab.
2. Choose how to share:
    - **Online QR**: a QR code that opens your card's web page. The page always shows your latest details.
    - **Offline QR**: a QR code that holds your contact details inside the code itself. A phone can save the contact from it without internet. A copy you already downloaded or printed keeps the old details, so download it again after you change the card.
    - Press **Download** under a QR code to save it as a picture for a poster, counter stand or email signature.
    - Under **vKad Public URL**, press **Copy** next to a link to copy it, then paste it into a WhatsApp chat or email.

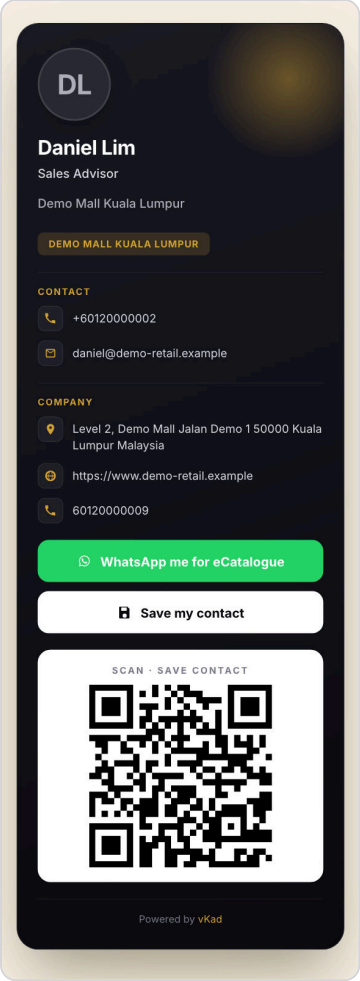


The second link (without /qr/) opens the card itself. This is what a customer sees on their phone:



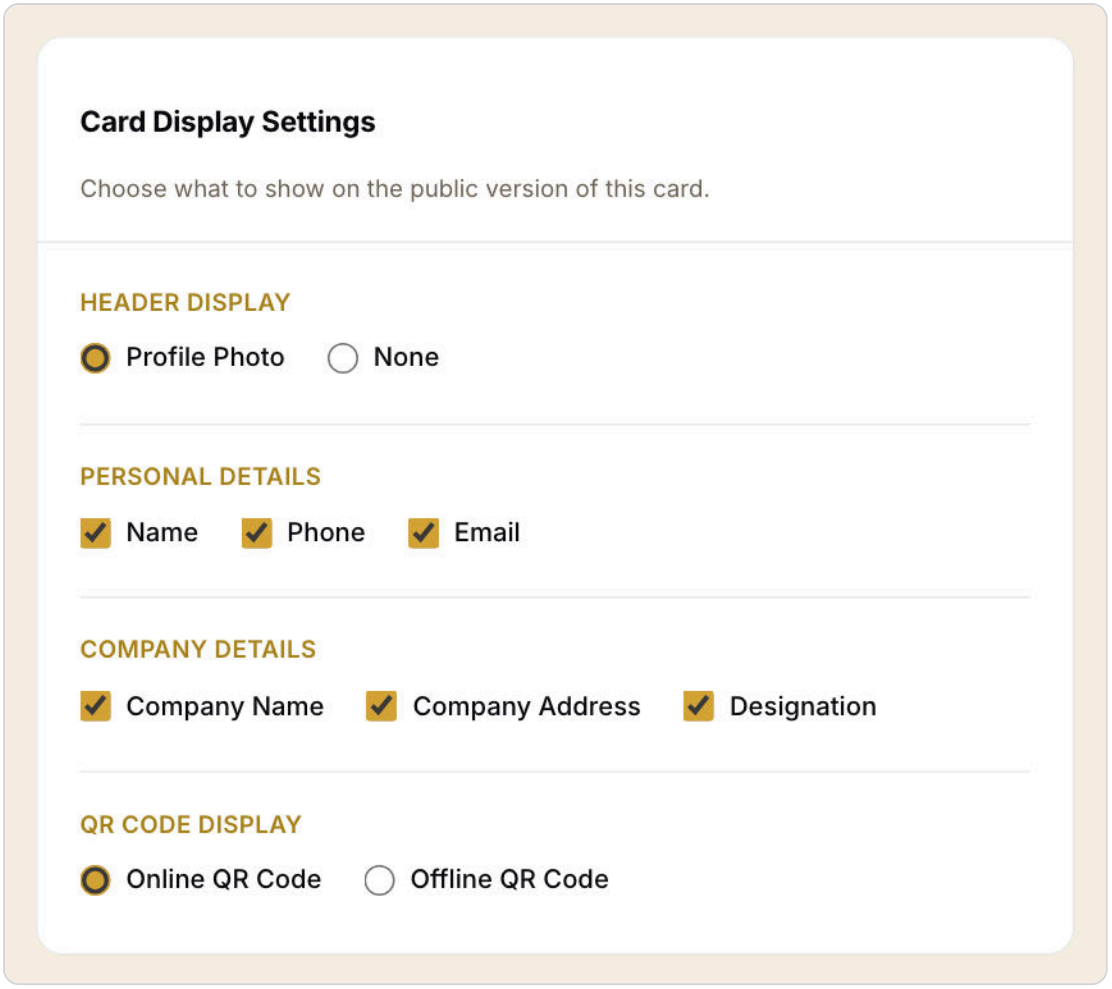
- **Save my contact** downloads your details as a contact file the phone can save.
- **WhatsApp me for eCatalogue** shows only if you added a catalogue. See "See who asked for your catalogue".

The first link (with /qr/) opens the same card with a QR code at the bottom. Open it on your own phone and hold it up for a customer to scan.



Choose what the /qr/ page shows

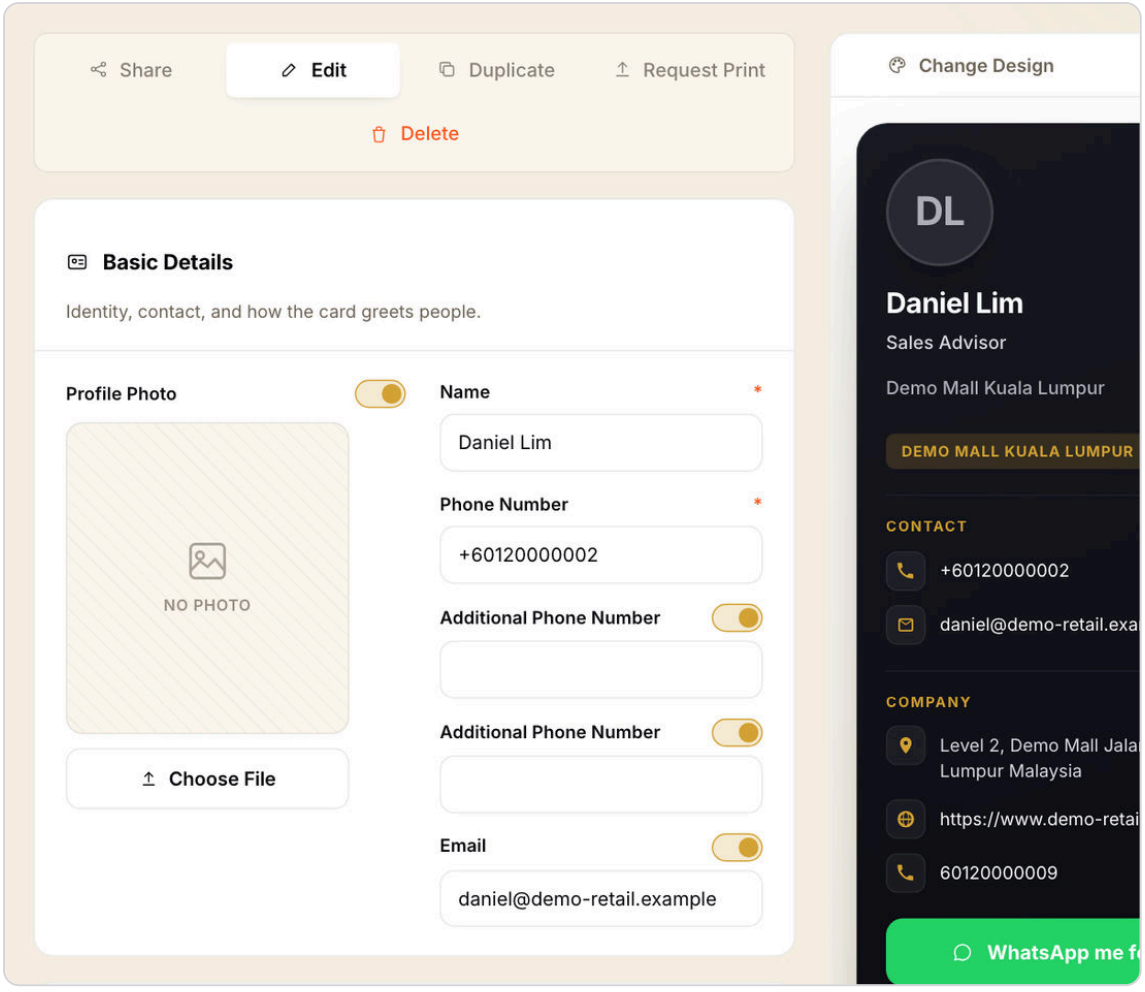
Further down the **Share** tab, **Card Display Settings** controls the /qr/ page: show your photo or not, which personal and company details to show, and whether its code is the **Online QR Code** or the **Offline QR Code**. Changes save as soon as you tick or untick. These settings do not change the normal card link.


Card Display Settings
Choose what to show on the public version of this card.
HEADER DISPLAY
Profile Photo
None
PERSONAL DETAILS
Name
Phone
Email
COMPANY DETAILS
Company Name
Company Address
Designation
QR CODE DISPLAY
Online QR Code
Offline QR Code

Change your card

For: Account Owner, Account Admin, Account User

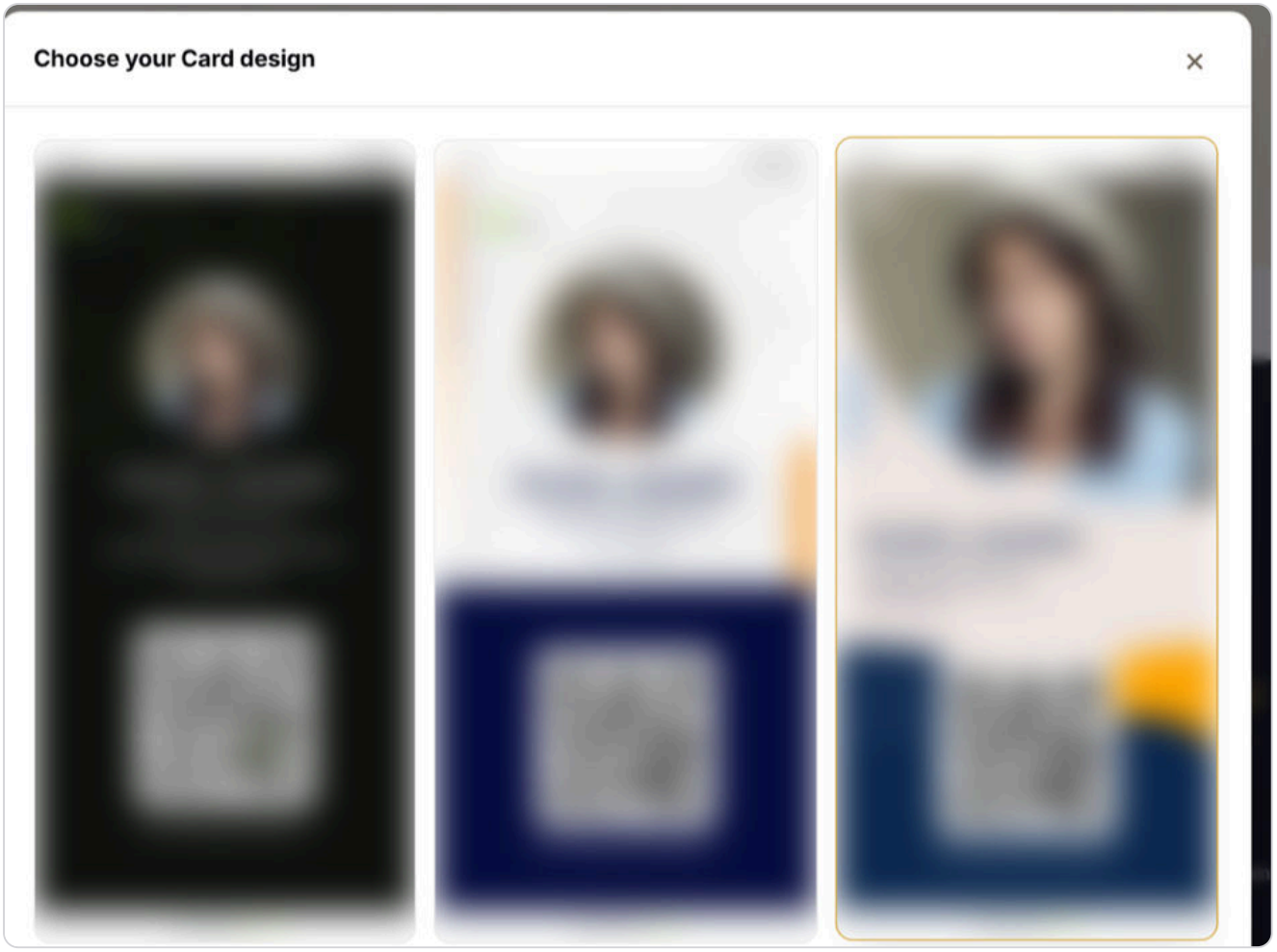
1. Open **My vCards** and press your card.
2. Press the **Edit** tab.
3. Change any field. There is no save button: each change saves on its own a moment after you stop typing, and the card on the right updates.
4. Use the switch next to a field to hide it from the card, or show it again.



If a change does not stick, check the **Email** field. vKad refuses changes while the email address is not a real one.

Change the design

1. On the **Manage Card** page, press **Change Design** above the card preview.
2. Press the design you want. Your details stay the same; only the look changes.

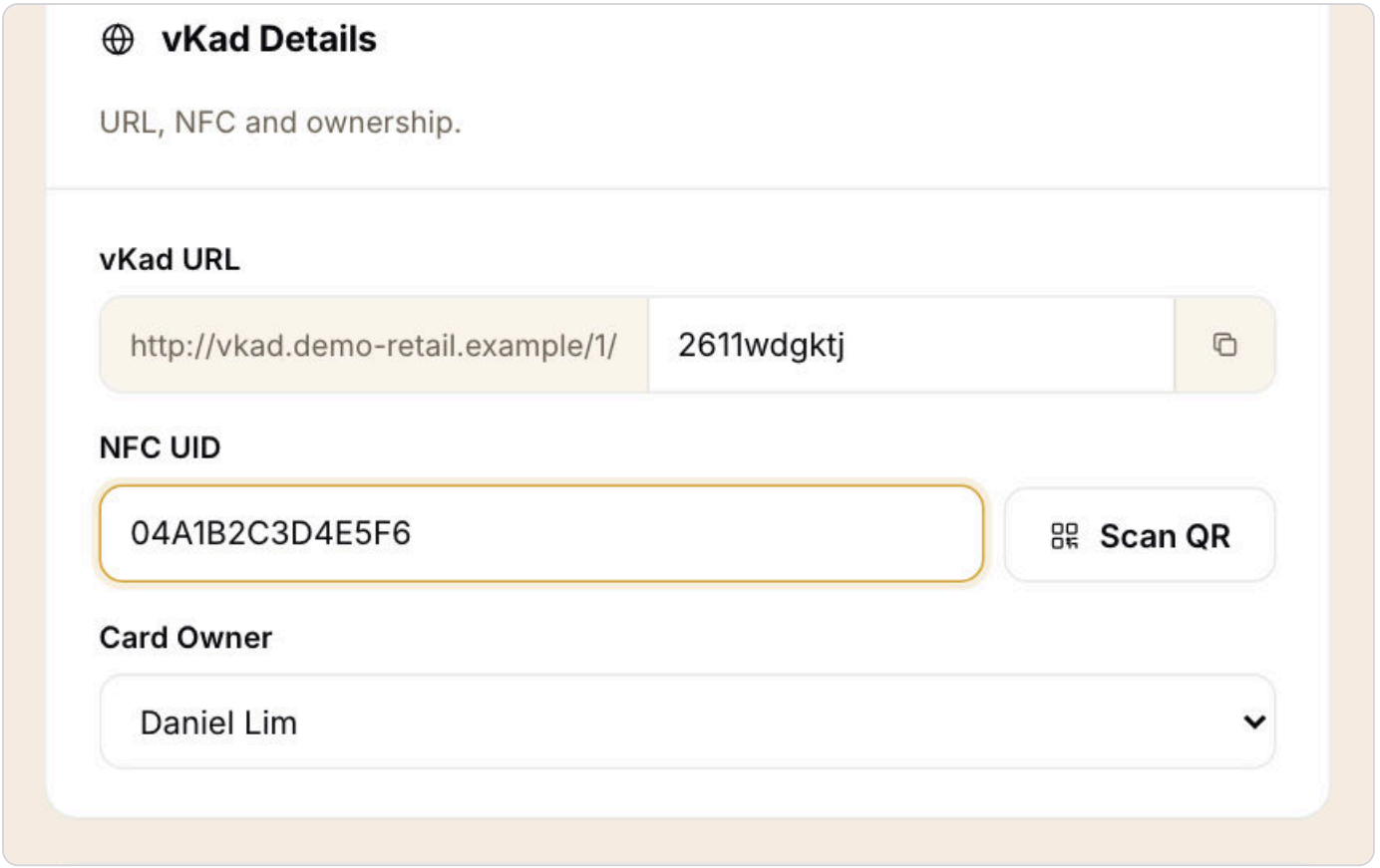

Choose your Card design

Link an NFC card

For: Account Owner, Account Admin, Account User

An NFC card is a plastic card with a chip. When a customer holds it against their phone, the phone opens your vKad card. Each NFC card has its own code, called the NFC UID, printed or shown as a QR code on the card. Linking tells vKad which card is yours.

1. Open **My vCards** and press your card.
2. Press the **Edit** tab and scroll down to **vKad Details**.
3. Type the code from your NFC card into **NFC UID**. Or press **Scan QR** and point your phone or laptop camera at the QR code on the NFC card.
4. It saves on its own. From now on, tapping the NFC card opens your vKad card.



One NFC card can link to one vKad card only. If the code is already used by another card, vKad says "This NFC number already exists" and keeps the old value.

The **Scan QR** camera was not tried for this guide; typing the code was.

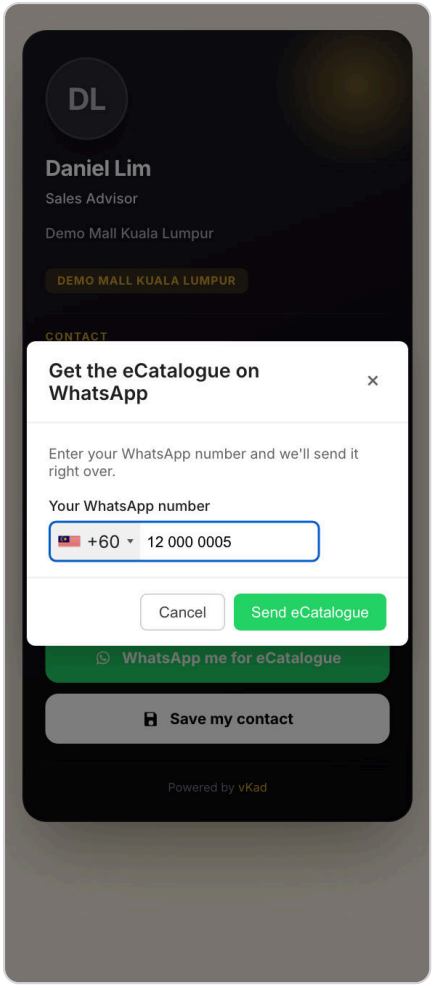
Order a printed NFC card

On the **Manage Card** page, press **Request Print**, then **Request New**. The **Request Physical Card** form asks for the card type, quantity and delivery address, and shows the price. Payment for the order is not covered in this guide.

See who asked for your catalogue

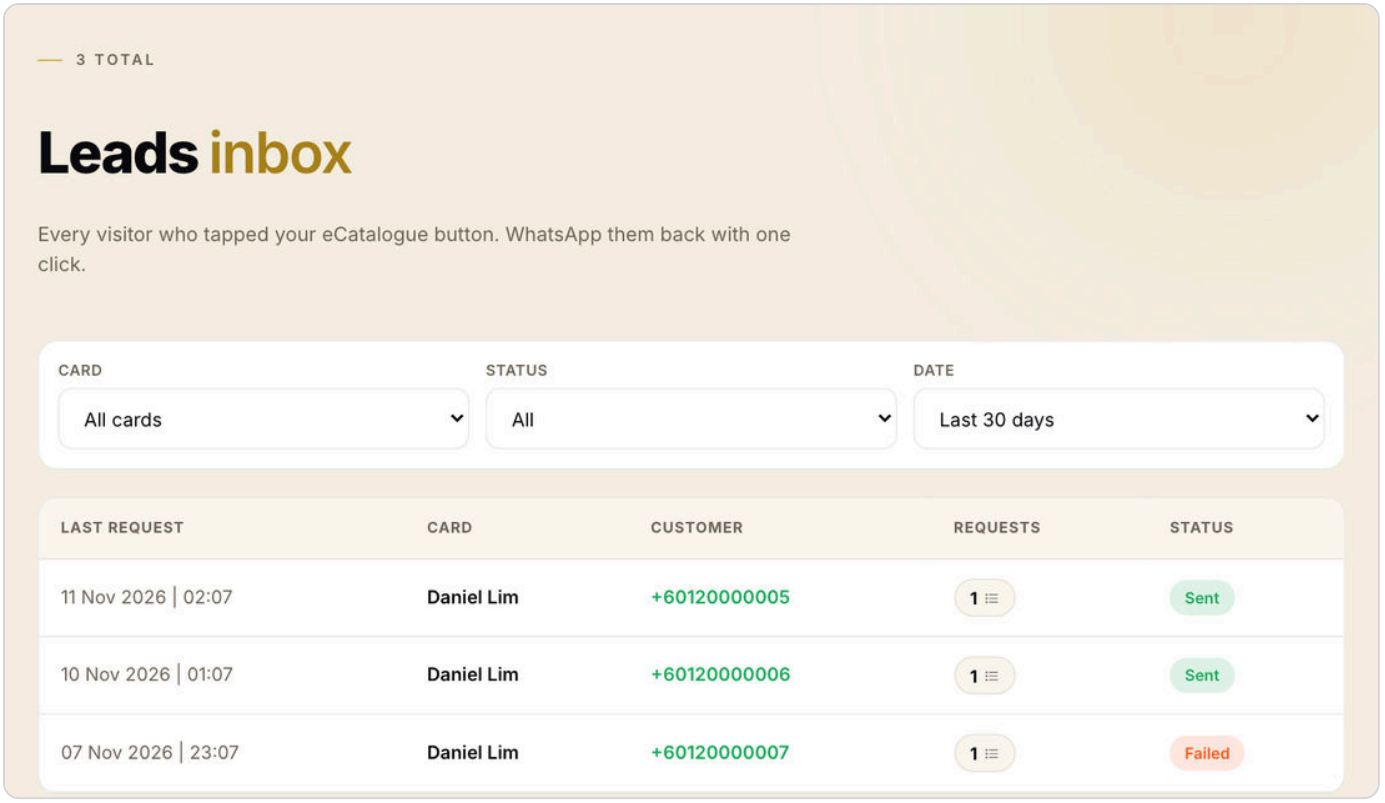
For: Account Owner, Account Admin, Account User

When your card has a catalogue, customers see a **WhatsApp me for eCatalogue** button. They press it, type their WhatsApp number and press **Send eCatalogue**. vKad then sends them the catalogue on WhatsApp and lists the request under **Leads** so you can follow up.



To see the requests:

1. Open **Leads** in the menu on the left.
2. Each row shows when the customer asked, which card they used, their number and how many times they asked.
3. **Status** says whether the WhatsApp message went out: **Sent**, **Partial** (only part of it went out) or **Failed**.
4. Use **Card**, **Status** and **Date** at the top to narrow the list.



An **Account User** sees requests for their own cards. **Account Owner** and **Account Admin** see requests for every card in the account.

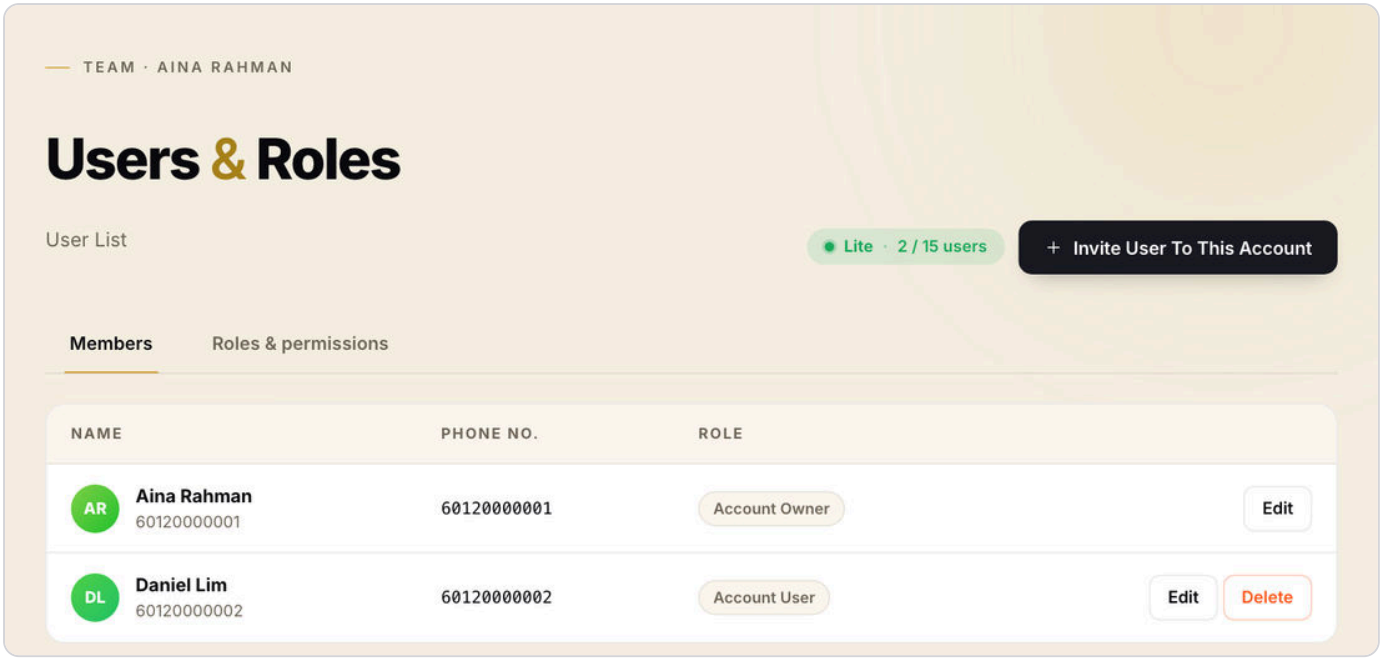
The WhatsApp sending was switched off in the copy used for this guide, so the customer's "sent" message was not seen here. The request was still saved and listed.

Add people to your account

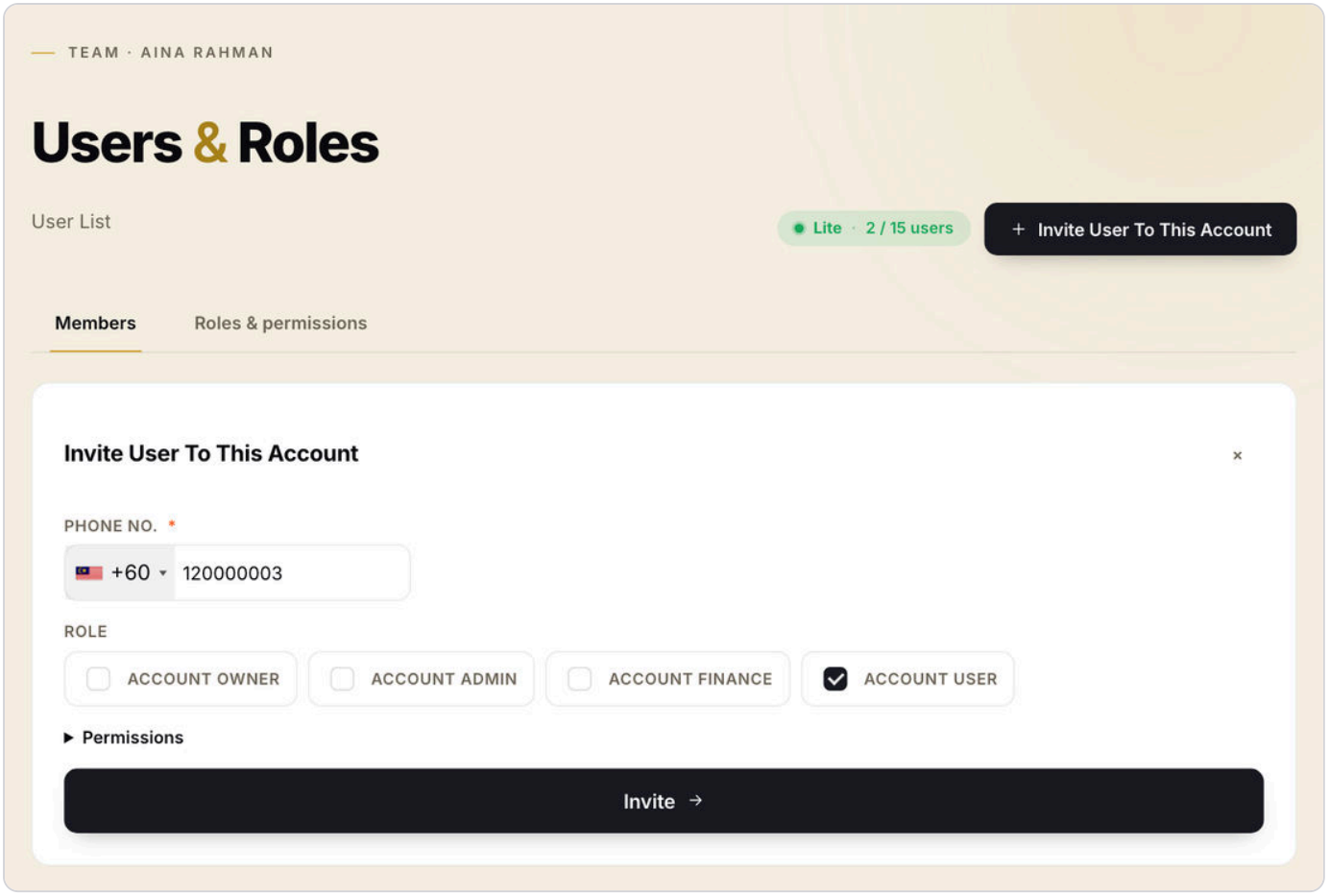
For: Administrators

This page is for **Account Owner** and **Account Admin**.

1. Open **Users & Roles** in the menu on the left. **Members** lists everyone in the account with their role. The green label shows how many people your plan allows.
2. Press **Invite User To This Account**.



3. Type the person's mobile number in **Phone No.**. Check the country code on the left.
4. Tick their role under **Role**. For most staff this is **Account User**.
5. Press **Invite**.



vKad adds the person to your account straight away. It does not send them a text message today, so tell them yourself to sign in to vKad with that phone number.

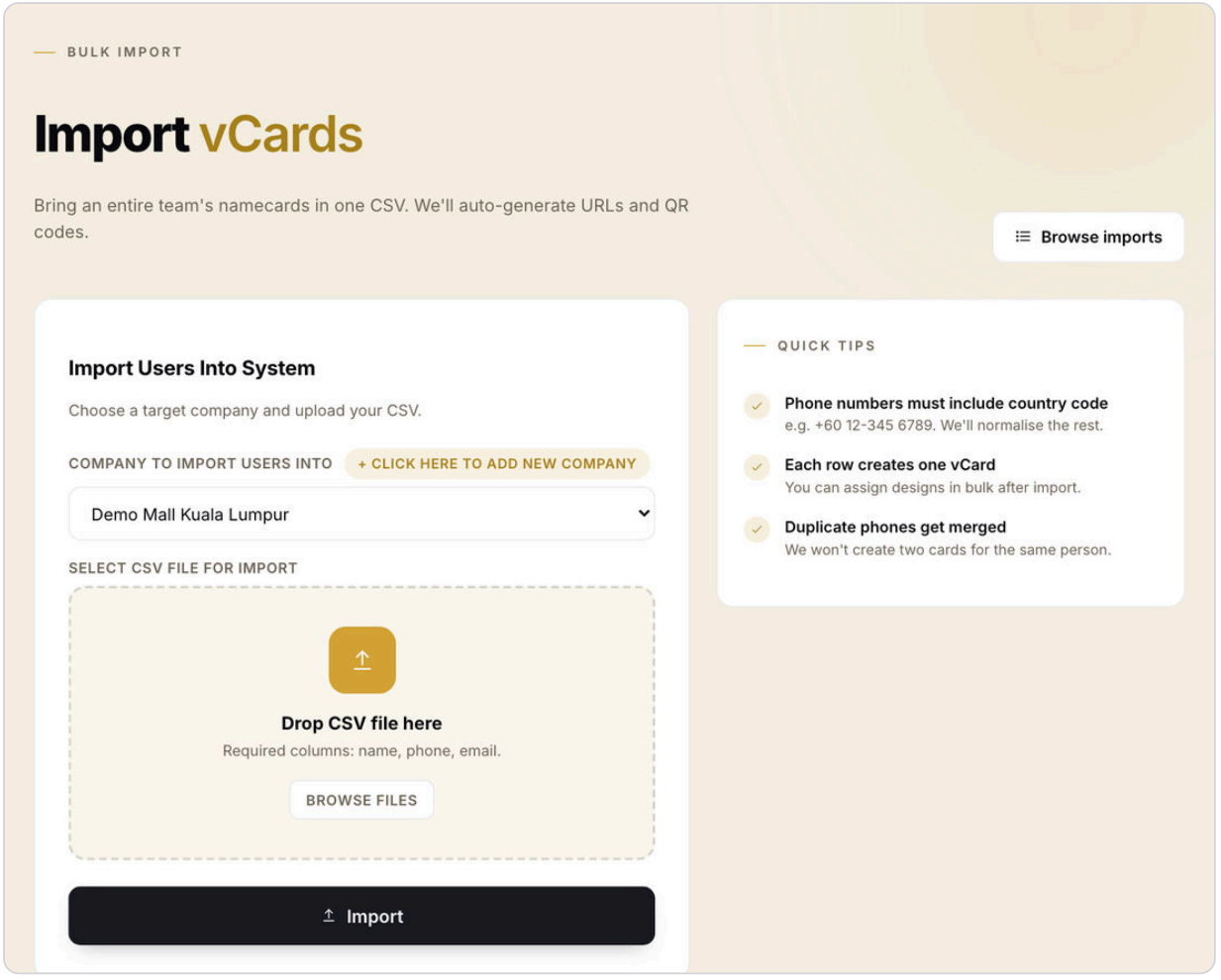
To change someone's role, press **Edit** on their row. To remove them, press **Delete**. **Roles & permissions** shows what each role can do.

Make cards for many staff at once

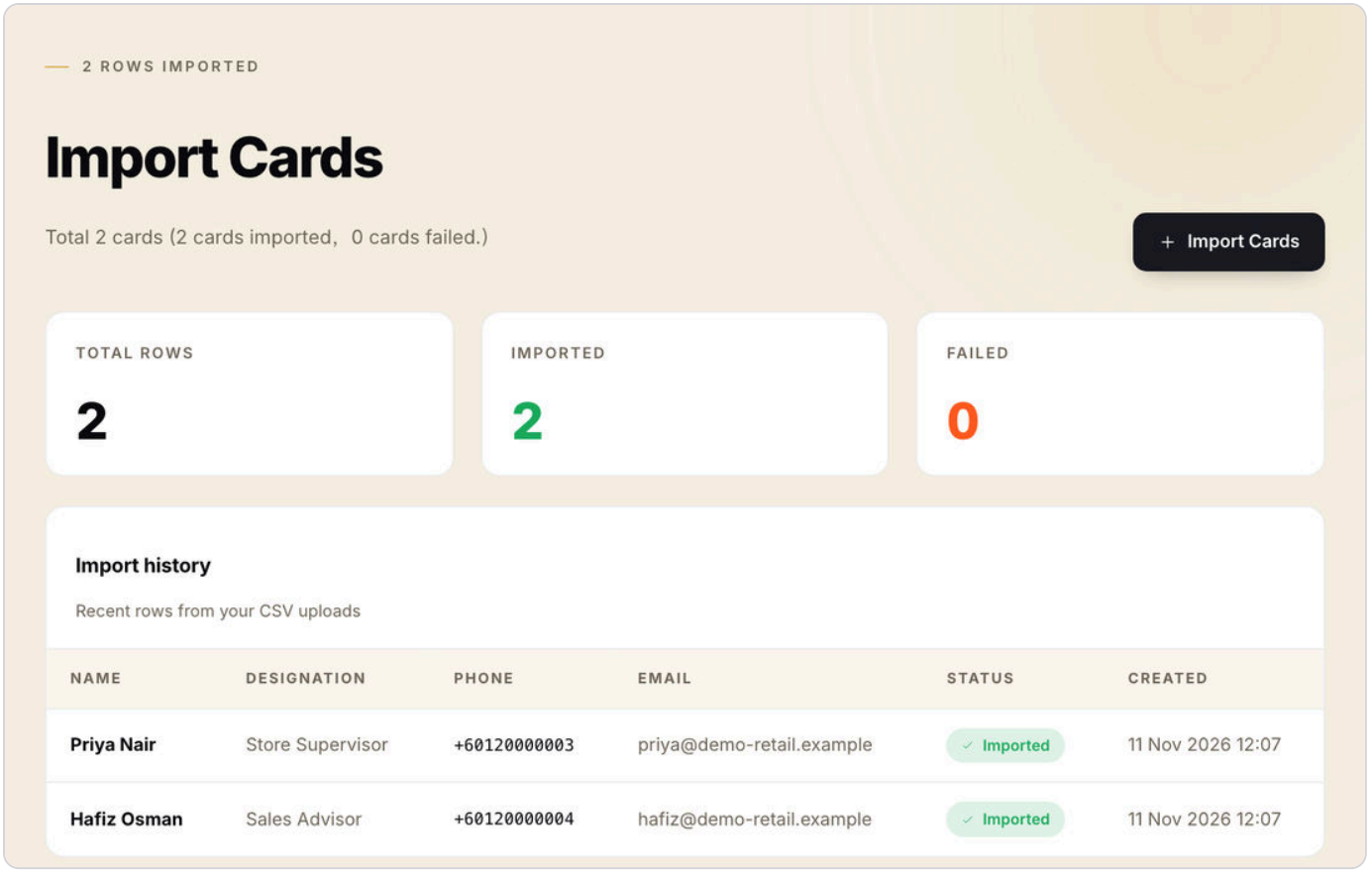
For: Administrators

This page is for **Account Owner** and **Account Admin**. Use it to make cards for a whole team from one spreadsheet.

1. Make a spreadsheet with exactly these four column headings in the first row: **Name**, **Designation**, **Tel**, **Email**. Fill one row per person. Put the phone number with the country code and no plus sign, for example 60120000003. Every row needs a name, a designation and an email.
2. Save it as a CSV file (in Excel: **File**, **Save As**, **CSV**).
3. Open **Import vCards** in the menu on the left.
4. Choose the company under **Company to import users into**.
5. Press **Browse files** and pick your CSV file.
6. Press **Import**.



vKad shows the result: how many rows were imported and how many failed, with one line per person.



Things to know:

- The upload box says "Required columns: name, phone, email". That is not quite right: the file only works with the four headings in step 1, spelled the same way.
- A row whose name, email and phone match a card that already exists is skipped as a duplicate.
- Imported cards use the first design, belong to the **Account Owner**, and are not linked to the company you chose. Open each card's **Edit** tab to pick the company under **Company Name**, and set **Card Owner** to the staff member once they have been added under **Users & Roles**.