AstroContacts v2.63
User Guide

Table of Content

Chapter 1 : Introduction

AstroContacts is a cloud-based centralized contact management tool for enterprises which empowers corporate teams to quickly look up business contact information right on their mobile devices. This tool enables an easier and quicker way of business communications. Just search business contacts using name/ phone number /email address on **AstroContacts** app, access the contact details, call, email or message.

It has the following benefits:

- Centralized Contact Directory

- Enables teams to efficiently connect and collaborate

- Avoids use of personal contact book for storing professional contacts

- No setup hassles, its Cloud-based!

- Access control for information protection

Platform Supported

- **Android** - Version 5.0 (Lollipop) onwards

- **iOS** - Version 10.0 onwards

Features

- View and Access Enterprise Contacts via Single Dashboard

- Advanced Search by Contact Name, Phone Number, Email Address

- Full Control and Access Rights to Admin

- Import Contacts in bulk using CSV

- Delete Outdated Contacts in bulk

- Save Contacts with different visibility

- Link Social Accounts to Profiles

- QR Code Enrollment

- Sync contacts to the native phonebook app

- Create tags based on the roles/location/skills/groups and more

Chapter 2 : Get Started with AstroContacts

AstroContacts allows admins to view and access business contacts via single web console. When a new employee contact has to be added, the admin can create a new contact on the web console and send an invite via email to the employee. Once the invite is received, the employee can simply download the AstroContacts app on his mobile device and login to the app using credentials provided in the invite email. The new employee is then automatically enrolled in the enterprise account. Now, he can also look up for the contact information of his team members to call, message or email them whenever needed.

To get started with **AstroContacts** within the organization, follow these steps:

- Login to **AstroContacts Web Console**

- Enroll a contact in **AstroContacts Web Console**

- Get Started with **AstroContacts** app on a mobile device
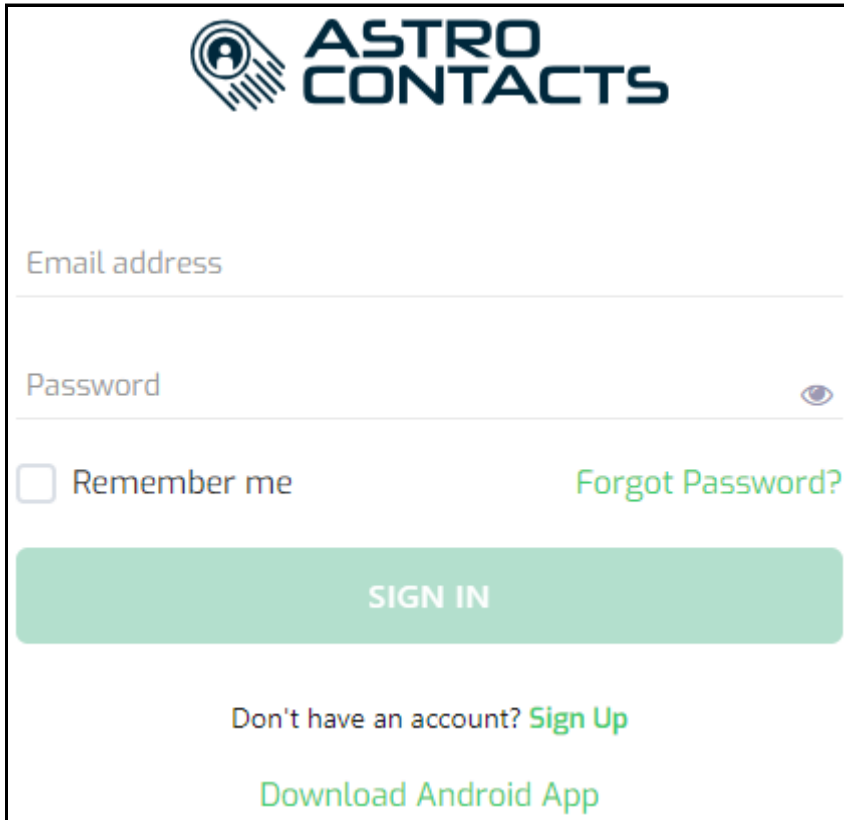
Login to AstroContacts Web Console

There are two types of users who can login to **AstroContacts Web Console:**

- Login as Existing User

- New User Sign up

Login as Existing User

To login into **AstroContacts Web Console** as an existing user, follow these steps:

1. Launch browser.

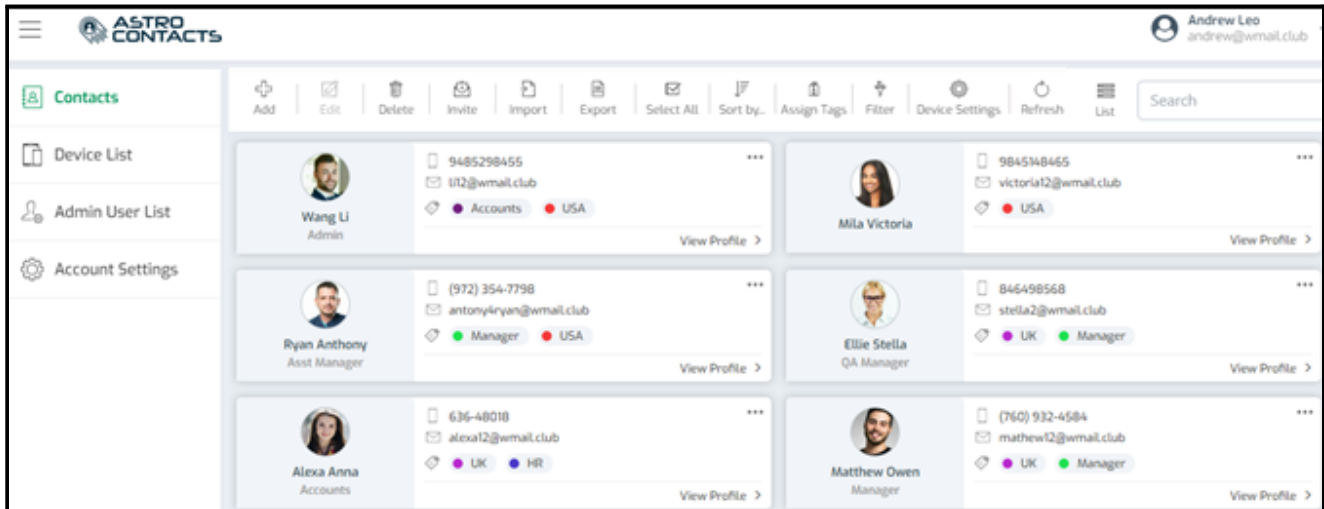2. Access AstroContacts Web Console.

3. On **AstroContacts** login page, enter **Email Address** and **Password** and click **Login.**

 *Note i. **Email Address** is the registered email address and **Password** is given during activation of the account.*

*ii. **Download Android App** will download **AstroContacts** application (apk file) from this screen.*

AstroContacts Home page appears on the screen.
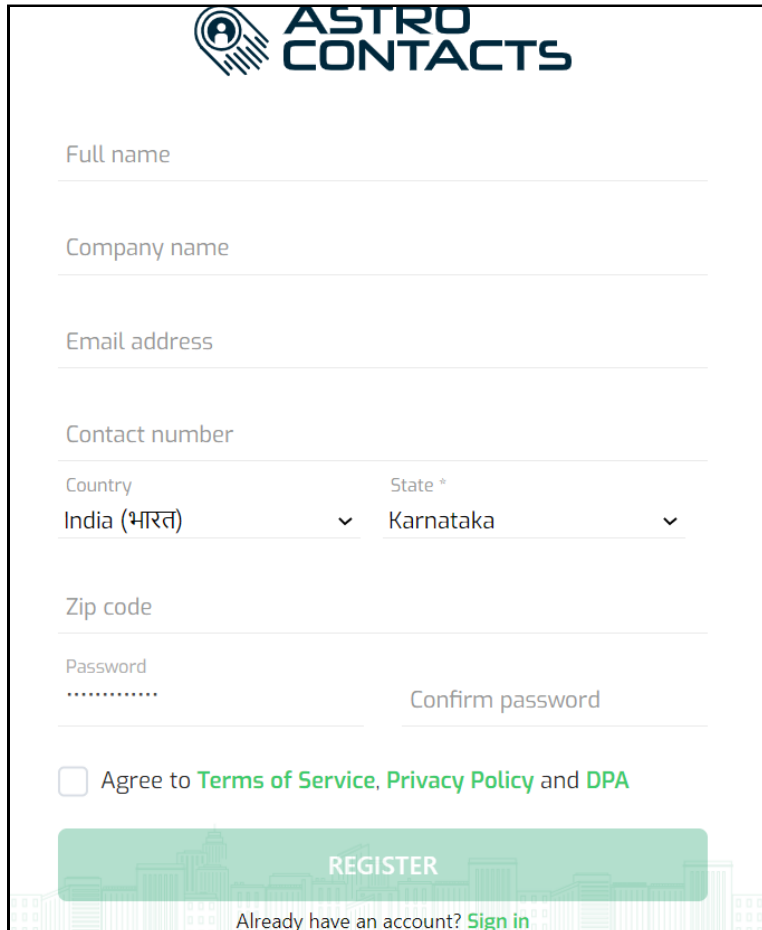
New User Sign Up

To login into **AstroContacts Web Console** as a new user, follow these steps:

1. Launch browser.

2. Access AstroContacts Web Console.

3. On **AstroContacts Console** login page, click **Sign Up.**

   A Sign-Up form appears on the screen.

4. On the **Sign**-**Up** form, enter the following details and click **Register.**

- Full Name

- Company Name

- Contact Number

- Email address

- Country

- State

- Zip code

- Password

- Confirm Password

A verification link will be sent to the user's email address (mentioned in the form).

5. Access the user's mailbox and open the verification mail from **AstroContacts** portal and click **Verify Now**.

6. On successful verification, login to **AstroContacts Console** as Existing User.

   AstroContacts Home page will appear.
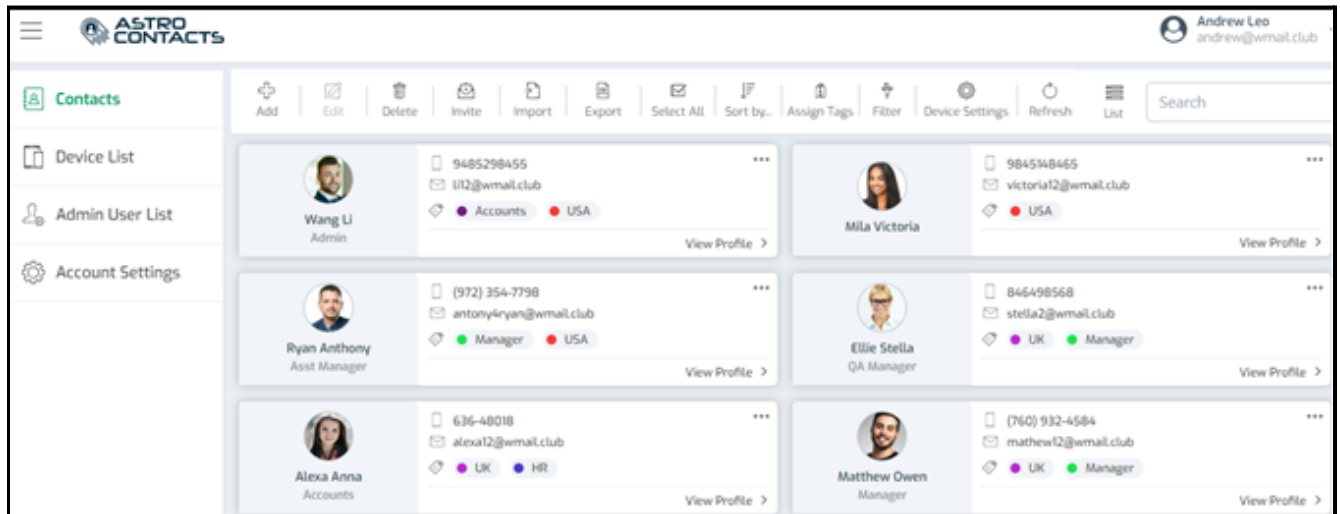
Enroll a contact in AstroContacts Web Console

There are three ways to enroll contacts in AstroContacts Web Console:

1. Create a contact and send an invite to the user

2. COSU Enrollment using QR Code

3. Using CSV File

Create a Contact and send an invite from AstroContacts Web Console

First admin should create a contact profile and then send an invite to the user to access all enrolled contacts available in the account.

Create a Contact

To create a contact in **AstroContacts** account using web console, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Contacts** from the left panel.

3. Click **Add.**

4. Enter the details under the following sections:

   - Personal

   - Address

   - Contact

   - Company

   - Other

5. Click **Save** to complete.

   Contact will be created and added to the **Web Console**.

Send an Invite to a Contact

Once a contact is added to the account and console, admin can send an invite to the email address provided in contact details for the user to download and start using **AstroContacts**. This invite will also have login credentials for the users to login into the app. To launch **AstroContacts** app in the mobile device, see Get Started with AstroContacts app on a mobile device.

To send an invite to a contact, follow these steps:

1. Login to **AstroContacts Web Console.**

2. Select **Contacts** from the left panel.

   All contacts added to the **Console** will be listed.

3. Select a desired contact from the list and click **Invite.**

An invite will be sent to the mobile device user with login credentials. To login to **AstroContacts** app, See Login to AstroContacts app using credentials.

Send Invite to Multiple Contacts

To send an invite to multiple contacts, follow these steps:

1. Login to **AstroContacts Web Console.**

2. Select **Contacts** from the left panel.

    All contacts added to the **Console** will be listed.

3. Click **Select All** to select all the contacts in the **Web Console** and click **Invite.**

                            Or

    Select the desired contacts (one-by-one) from the list and click **Invite.**

    An invite will be sent to all selected contacts with login credentials. To login to **AstroContacts** app, see Login to AstroContacts app using credentials.

Using CSV File

Using CSV file, bulk contacts can be enrolled to the Web Console.

To add bulk contacts to the **Web Console** using CSV file, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Contacts** from the left panel.

3. Click **CSV**.

    A template file in **CSV** format will download.

4. Open the **CSV** file, fill the series of contacts details and save the file in local drive.

5. Click **Import > Choose File** and select the **CSV** file from the saved location and click **Open.**

    All contacts in template file will be added in bulk to the **Web Console**.

Get Started with AstroContacts app on a mobile device

AstroContacts application can be downloaded from following sources on the mobile devices:

- **Android** - Google Play   or AstroContacts Web Console's Login Page

- **iOS** - App Store

Once admin has invited the contact, an invite mail will be sent to the employee's email address with login credentials. There are three ways to login to **AstroContacts** application on mobile devices.

1. Login to AstroContacts app using credentials

2. Login to AstroContacts app using Scan QR Code

3. Login to AstroContacts app using Scan QR Code generated from user's invite email

Login to AstroContacts app using credentials

On successful launching of **AstroContacts** application on the device, the AstroContacts login page will appear.Enter the **User Name** and **Password** that was shared in the invite mail and tap **Login**.

AstroContacts home page appears with the contacts of other enrolled users as shown in the screenshot below:
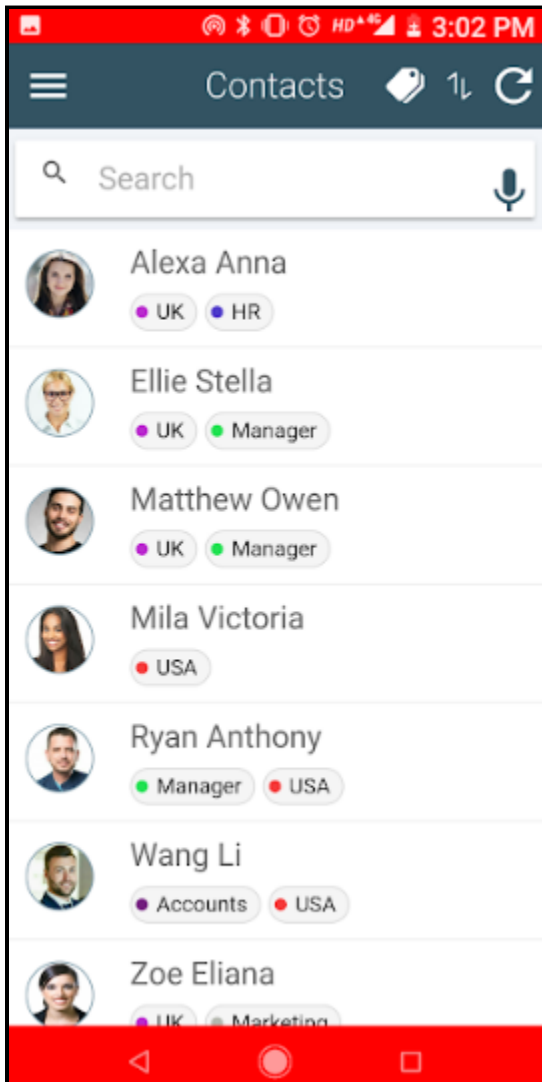
Login to AstroContacts app using Scan QR Code

AstroContacts application can also be launched by scanning the QR Code from **AstroContacts Web Console**.
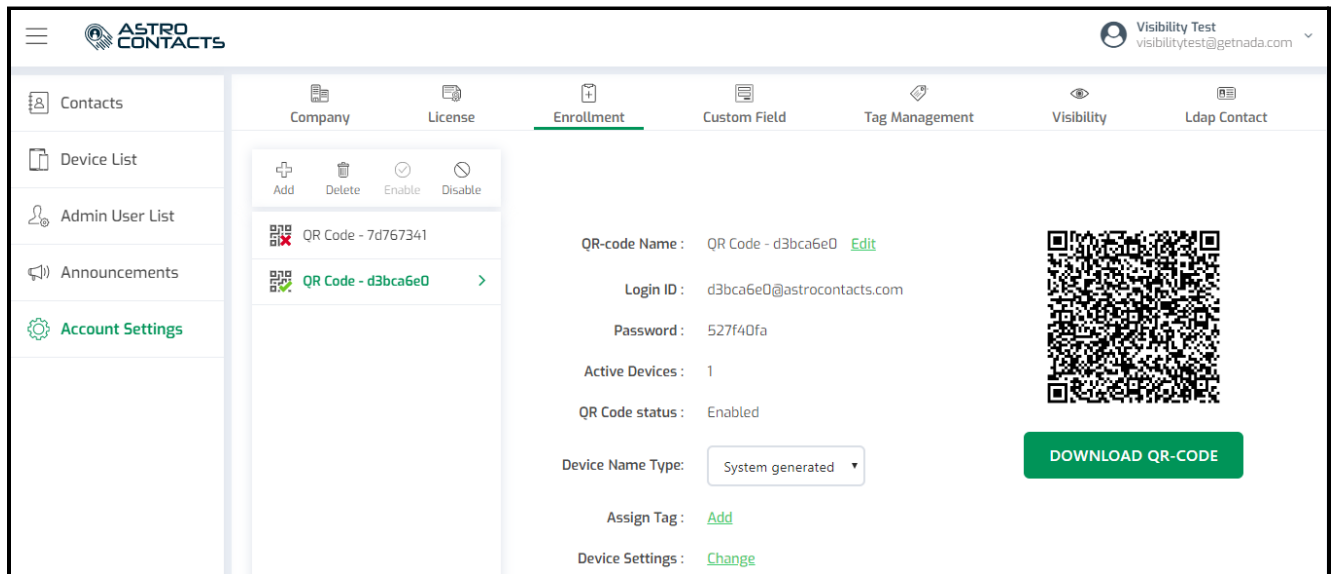
To login to **AstroContacts** app by scanning the QR Code, follow these steps:

1. On the **AstroContacts** login page, tap **Scan QR Code.**

   The device will be ready for scanning.

2. On the **AstroContacts Web Console**, select **Account Settings** > **Enrollment**.

QR Code will be displayed on the screen as shown in the below screenshot. To know how to manage QR code, see Manage QR Codes.


4. Configure the settings:

| Settings	Description
QR-code Name	Displays a unique code name. Click **Edit** to change the QR code name, if required.
Device Name Type	• **System Generated** – When this option is selected, a system generated device name will be created automatically and assigned to the device after scanning the QR code. • **Manual** – When this option is selected, the user can edit the **Device Name** on the **AstroContacts** app.
Assign Tag	Assign tag(s) to the contact.
Device Settings	Allows admin to remotely control device settings on AstroContacts app from the console. To know about the device setting descriptions, see Device Settings

5. Once done, scan the QR Code using the mobile device. The user will automatically login to the **AstroContacts** application.

   On successful login, the user will see the contacts of the other enrolled users as shown in the screenshot below:
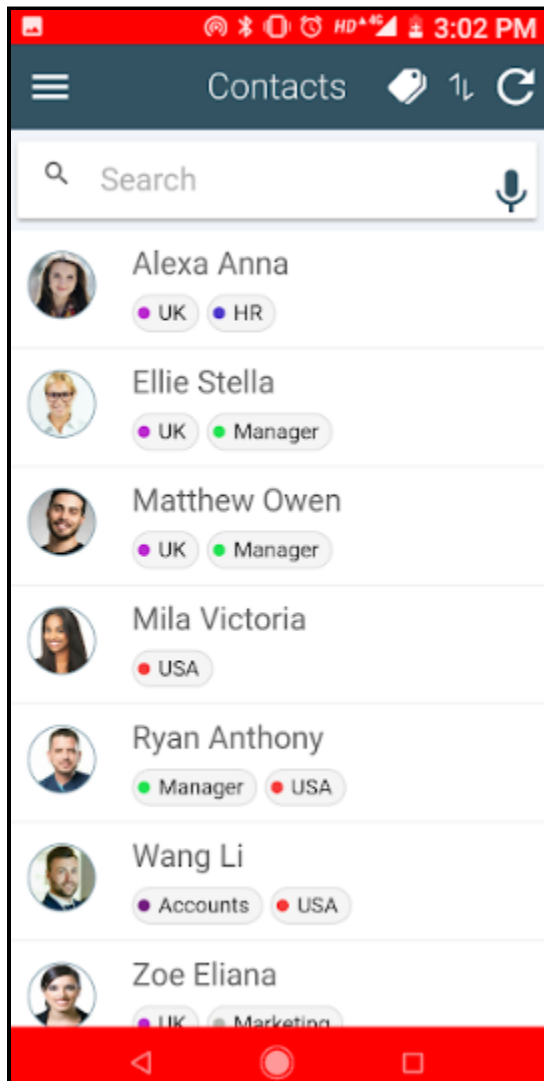
Manage QR Codes

Admin can create multiple QR Codes for different groups so that when a specific QR code is scanned the user gets automatically enrolled and is assigned under a group.
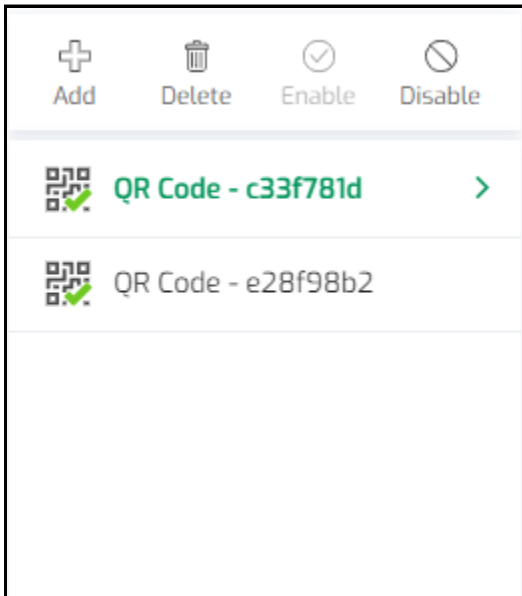
Following options are available in Enrollment section:

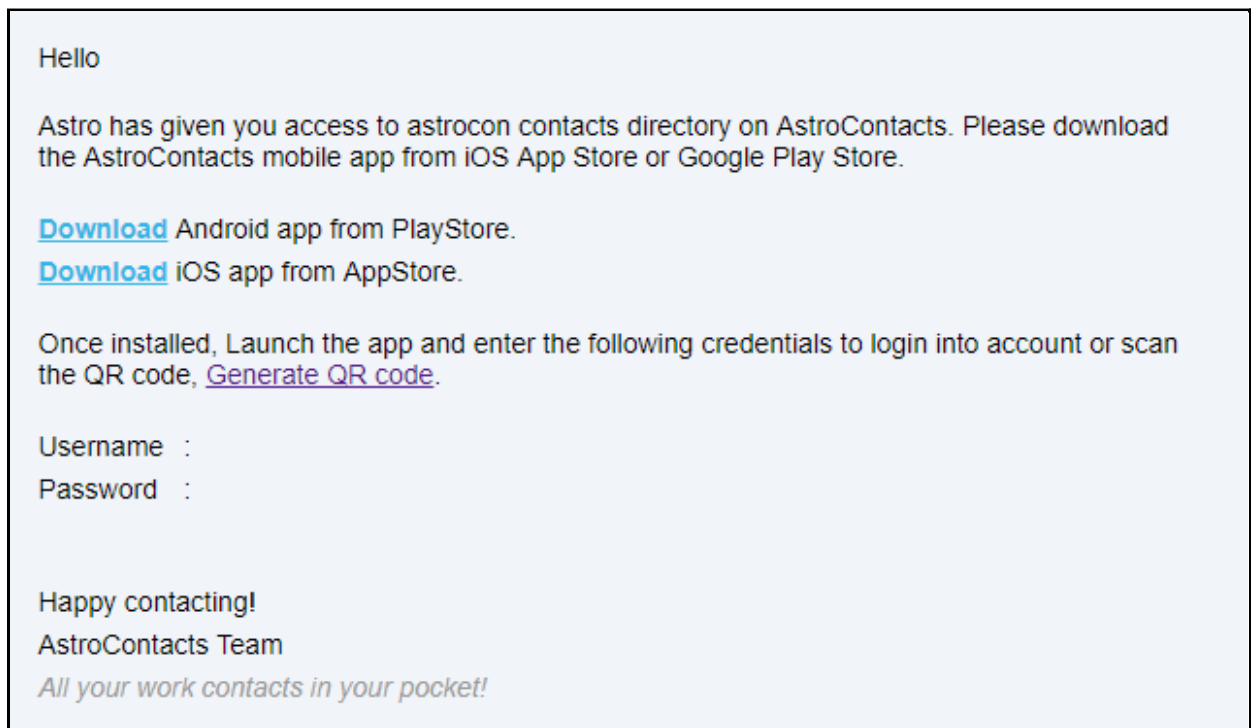| Actions	Description
⊹ Add	Add new QR code to the list.
🗑 Delete	Delete a QR Code.
⊘ Disable	The QR code will be temporarily disabled and further login with this QR code will not be allowed.
⊘ Enable	The disabled QR code will be enabled, it will allow users to login using this QR code.

Login to AstroContacts app using scan QR code generated from Contacts' email invitation

The user can also generate the QR code from the invitation email received from the **AstroContacts Web Console**.

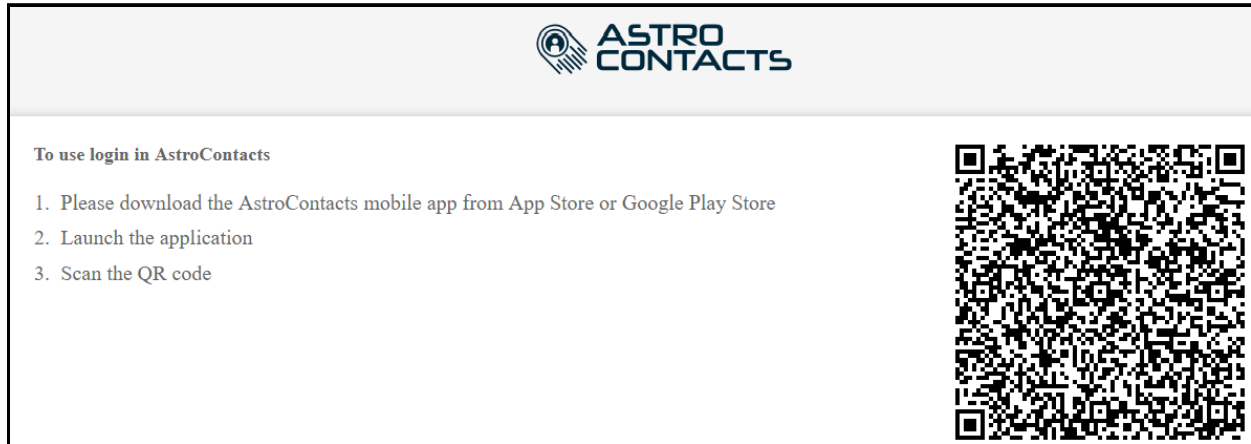To generate the QR Code from the invitation email received from **AstroContacts Web Console**, follow these steps:

1. Open the invitation email received from **AstroContacts**.

    The message will appear as shown in the screenshot below:

    Hello

    Astro has given you access to astrocon contacts directory on AstroContacts. Please download the AstroContacts mobile app from iOS App Store or Google Play Store.

    Download Android app from PlayStore.
    Download iOS app from AppStore.

    Once installed, Launch the app and enter the following credentials to login into account or scan the QR code, Generate QR code.

    Username :
    Password   :

    Happy contacting!
    AstroContacts Team
    All your work contacts in your pocket!

2. Click **Generate QR Code**.

    The QR Code will be displayed on the screen as shown in the screenshot below:

ASTRO CONTACTS

To use login in AstroContacts

1. Please download the AstroContacts mobile app from App Store or Google Play Store
2. Launch the application
3. Scan the QR code

3. Download and launch the AstroContacts application on the device.

4. On the **AstroContacts** login page, tap **Scan QR Code.**

The device will be ready for scanning.

5. Scan the QR Code displayed on the screen using the mobile device.

The user will automatically login to the **AstroContacts** application.

On successful login, the user will see the contacts of the other enrolled users as shown in the screenshot below:
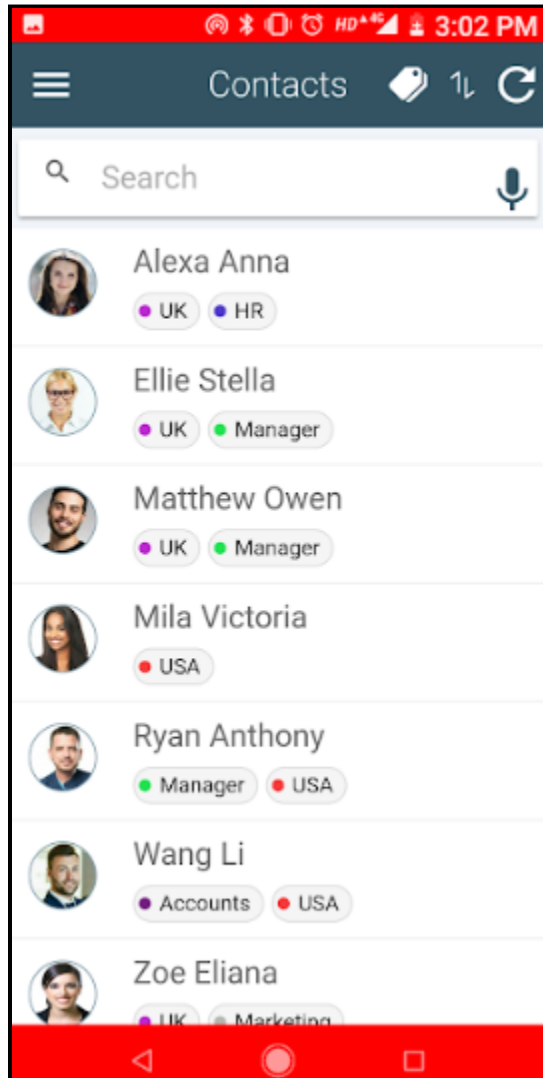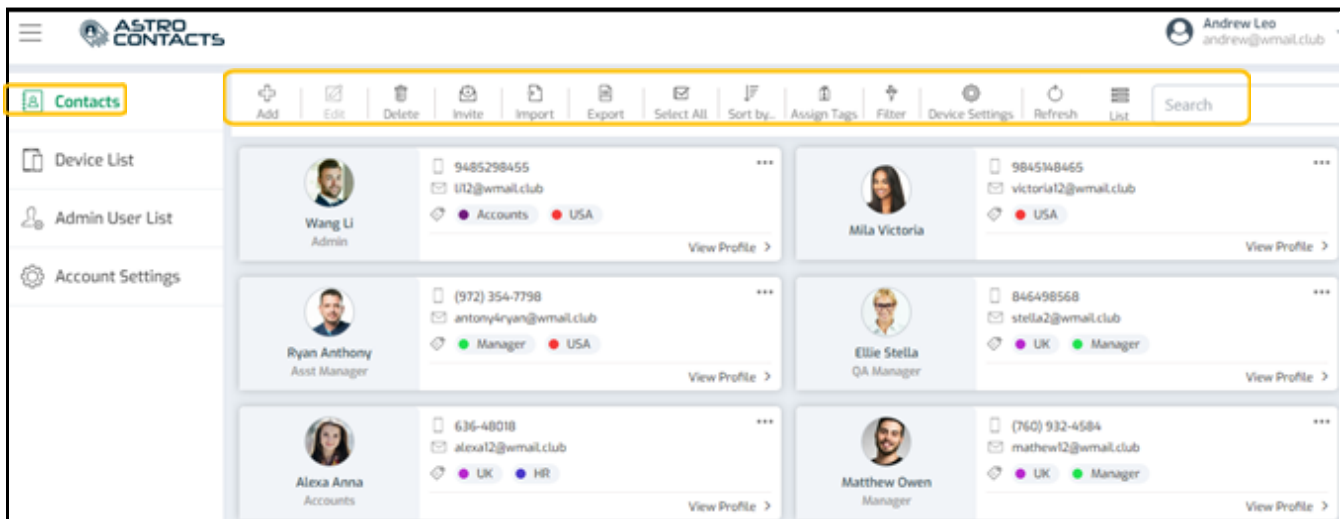
Chapter 3: AstroContacts Web Console

AstroContacts Web Console is a single dashboard which helps the IT admins to view and manage contacts.

The **Web Console** has following options:

- Contacts

- Announcements

- Tag Management

- Device List

- Admin User List

- Account Settings

- Enrollment

Manage Contacts

On successful login to **AstroContacts Web Console**, by default, the console opens with **Contacts** section.


In **Contacts** section, admin can perform following actions:

Actions	Description
Add	Add new contact. See Create a Contact
Edit	Edit details for a selected contact
Delete	Delete a selected contact(s) from the list
Invite	Sends an invite to the contact. See Send an Invite.
Import	Import contacts (in **CSV format**) in bulk from the saved location. See Import Bulk Contacts.
CSV	Download the template in **CSV** format in which the user has to fill all contact details to perform Import Bulk Contacts. See Import Bulk Contacts.
Export	Export the bulk contacts and edit the details in CSV format. See Export Bulk Contacts. ***Note:*** *When single or multiple contact cards are selected, CSV icon will change to Export icon.*
Refresh	Refresh contact(s) details
Select All	Select all contacts of a specific page. Admin can further perform actions on multiple contacts such as **Delete, Invite** and **Refresh.**
Sort by...	Sort First Name of contacts in following alphabetical orders: • A-Z

Actions	Description
	• Z-A
Assign Tag	Assign tag(s) to single or multiple contacts. Refer to Assign tag(s) to Contacts
Filter	Filter the contacts based on the tags selected. **Note:** *Double-click on a specific tag in contact card to filter the contacts that are assigned to that tag.*
Device Settings	Allows admin to remotely control device settings on AstroContacts app from the console. To know about the device setting descriptions, see Device Settings
List	Switch the view of contacts between **List View** and **Grid View**
Search	Search can be performed on Contact's First Name, Last Name, Mobile Number and Email Address

Actions on a specific Contact

Admin can invite or delete a specific contact and restrict profile edits using **AstroContacts** Web

Console.
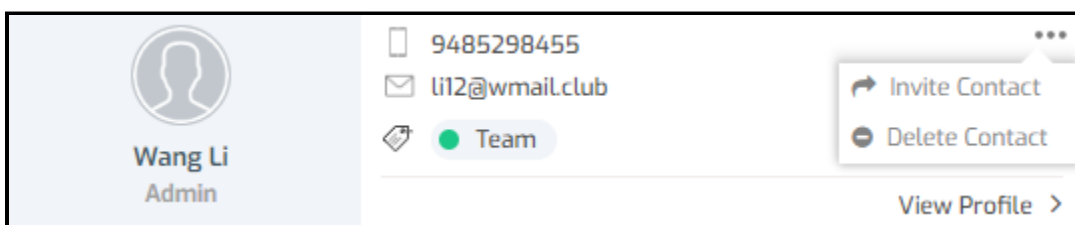
- **Invite Contact** – When **Invite Contact** is selected for a contact card, an invitation will be sent to the contact's email address (see Send an invite to a contact). Once the invite is sent to a contact, **Invite Contact** option will change to **Invite Sent** status as shown in the screenshot below:
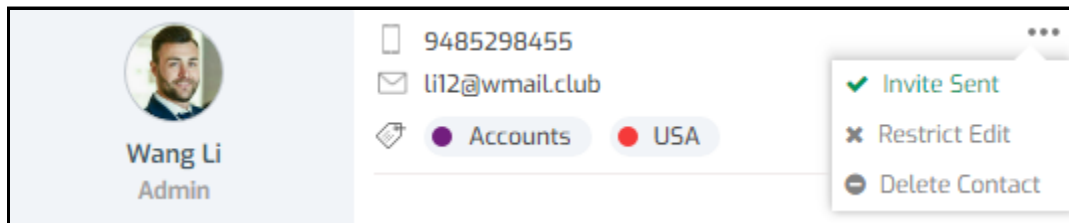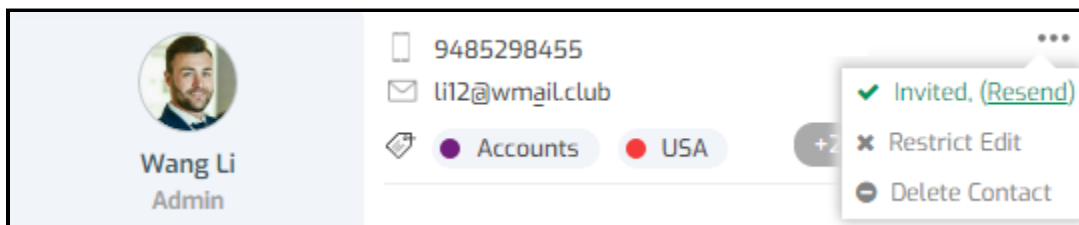

Resend option will appear after 30 mins of the last invite sent to the contact. If the user has not activated the link sent by email or the link has expired, the admin will have the option to resend the invite to the user.

- **Delete Contact** - The contact will be deleted from the **Contacts** section and also from the **AstroContacts** application on all the enrolled users' devices.

- **Restrict Edit** - Admin can restrict or allow the device user to edit their profile or device name. To allow the user to edit the profile details, select **Allow Edit.**
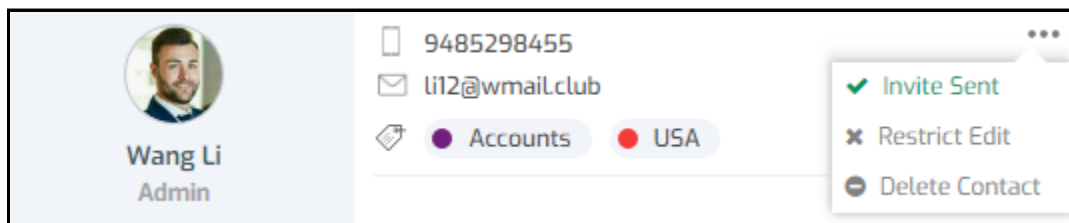
Note: Restrict Edit option will be available in the contact card only after an invite is sent to the contact.

Export Bulk Contacts

Admin can edit the contacts in bulk using **Export** option in the **Web Console**. The contacts will be exported in CSV format. The details in CSV file can be edited and uploaded with the changes. The changes updated in CSV file will reflect in the contact card.

Note: *When single or multiple contact cards are selected, CSV icon will change to Export icon.*

To export the bulk contacts and edit the contact details, follow these steps:

1. Login to **AstroContacts Web Console**.
2. Select **Contacts** > **Select All**.

    Or

    Select the required contact cards manually.

3. Click **Export**.

    A CSV file will be downloaded.

4. Edit the required contact details in CSV file and save it in the local drive.

    Use **Import** option to upload the CSV file. The changes updated in CSV file will reflect in the contact card.

Device Settings

Allows admin to remotely control device settings on **AstroContacts** app from the console. This option is for the users who have enrolled through the invite. To configure device settings on **AstroContacts** app, select the contact(s) on the console and use **Device Settings** option in the toolbar. This will only apply the settings to selected or group of enrolled devices but not for new enrollments.

Configure the following settings and click on **Save**.

- **Auto Sync** - Once enabled, will copy all contact additions and modifications from the AstroContacts app to the native phonebook app.

- **Restrict edit access** - Enable this option to restrict the users from editing their profile on the AstroContacts mobile app.

- **Auto remove duplicates** - When this option is turned ON, duplicate contacts with same **Emails/Phones/First Name/Last Name/Middle Name** will be automatically removed from the native phone book on contacts sync.

  Note: Admin can select a combination of fields for the auto removal of duplicate contacts from the native phone book.

- **Selected tag sync** - Once enabled, this setting will allow copying of contacts with selected tags from the AstroContacts app to the native phonebook app.

- **Settings Password** - Enforce a password for the user to access AstroContacts Settings on the device.

Announcements

Announcements feature in **AstroContacts** help admins send notifications or organizational announcements to all the enrolled contacts or to a specific group on their mobile devices.

Compose an Announcement

To compose an announcement in **AstroContacts Web Console, follow these steps:**

1. Login to **AstroContacts Web Console**.

2. Select **Announcements** from the left panel and click **Create**.

3. Enter the **Title**, **Description** and compose the message.

Note: *Use the formatting tools to create a custom message with images, videos and more.*

4. Specify the following details:

    – **Expiry Date** – Date when the announcement will get auto removed from the **Announcements** section of the user's **AstroContacts** mobile app on the device.

    – **Pin Announcements** – Once enabled, the announcement will be prioritized and will reflect on top in Announcements list on the device.

    – **Assign Tags** – Assign a tag to send the announcement to a specified tagged users only.

5. Click **Save** to complete.

    Once the announcement is saved, the users will get app notifications on their mobile devices notifying them of the new announcement.

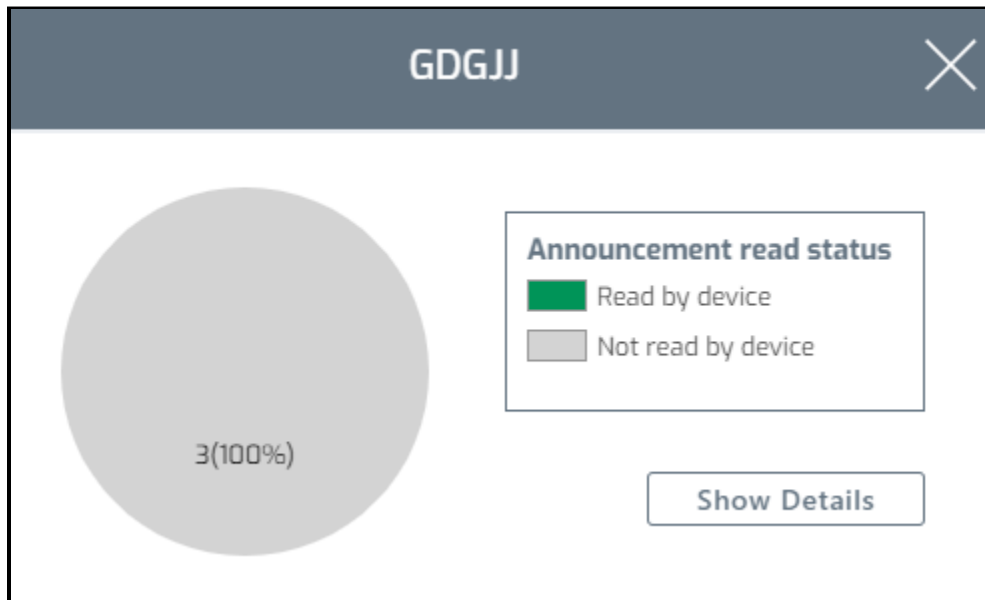## Export Announcement Read Details

Admin can view and export the announcement read status (Yes / No) of all eligible contacts in CSV format from the **AstroContacts Web Console**.

Note: *Eligible contacts are the contacts enrolled by invitation or contacts enrolled using QR code.*

To export announcement read status list from the console, follow these steps:

1. Login to **AstroContacts Web Console**.
2. Click **Announcements** and select an announcement from the list and click **Announcement Read Status.**

3. Click **Show Details.**

   Displays a list of all invited contacts or contacts enrolled using QR code with announcement read status.

4. Click **Export.**

Tag Management

Admin can create tags based on roles, location, skills, groups and more. These tags can be assigned to single or multiple contacts. Tagging makes it easier to find contacts within the organization. Tags assigned to a contact will be exposed on contact cards in console and mobile app.
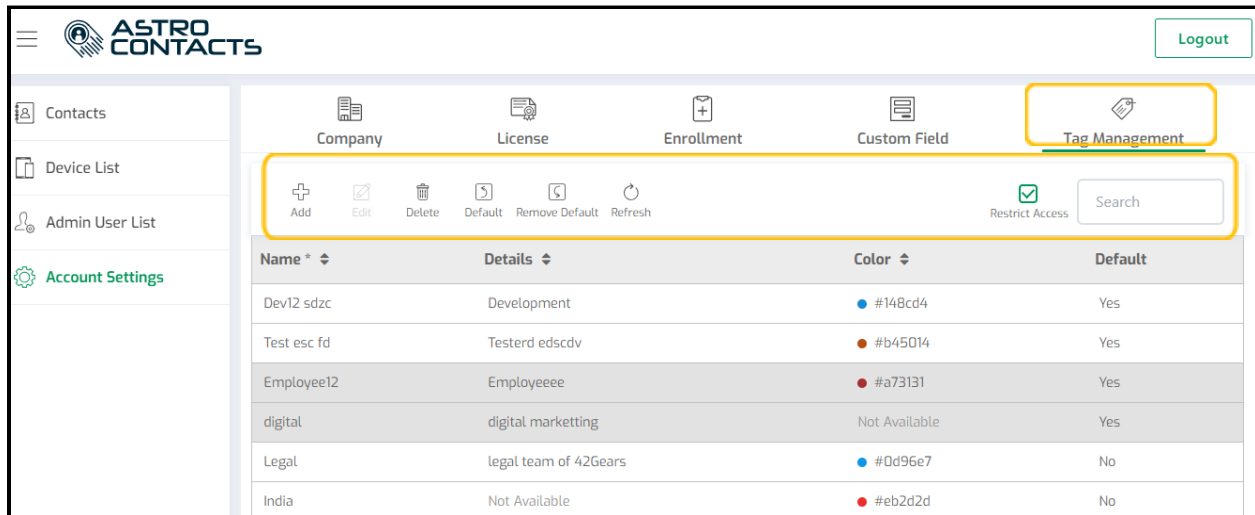
Following options are available in the **Tag Management** section:

Actions	Description
Add	Create a tag.
Edit	Edit tag details.
Delete	Delete a tag.
Default	Assign a specific tag as default. Default tags are automatically assigned to new contacts at the time of creation.
Remove Default	Remove the default tag.
Refresh	Refresh user details.
Restrict Access	Restricts the contact access on mobile-app on basis of assigned tags.
Search	Search for a specific data from the list.

Create a Tag

To create a new Tag, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Account Settings** from the left panel > **Tag Management.**

3. On **Tag Details** prompt, enter Tag Name, description in Details field and select tag color from the color picker.

4. Click **Save.**

Assign Tag(s) to Contacts

Tags can be assigned to single or multiple contacts.

Single Contact

To assign tag(s) to single contact, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Contacts** from the left panel.

3. Select a contact card and click **Assign Tag.**

4. On the **Tag Contacts** prompt, click on the tag(s) and click **Save.**

   The tags selected will be assigned to the Contact.

   *Note: Tags can also be assigned to a new contact under **Contacts > Personal > Tag Contact.** Refer to the steps under* Create a Contact.

Multiple Contacts

There are two ways to assign tags to the Contacts:

- Select multiple contact cards from **Contacts** section and follow the step 4 under **Single Contact**.

- Assign Tags using Import option

  Tags can be assigned to multiple contacts using import option. To assign tags to bulk contacts, refer to Import Bulk Contacts. If admin wants to add more than one tag, in **CSV** file, under **Tags** column, tag names will be added to each contact row separated with comma.

  For example: tag1,tag2,tag3

  Note: *Tags cannot be created in **CSV** file. Hence, the tags assigned to the contact should be available in the console.*

Remove Tags assigned to a Contact

To remove Tags assigned to a Contact, follow these steps:

1. Login to **AstroContacts Web Console**.
2. Select **Contacts** from the left panel.
3. Click **View Profile** of the contact card for edit.
4. Click **Edit.**

   Details associated with the contact will be available for editing.

5. Navigate to **Personal** section, remove the specific tags from **Contact** and click **Save.**

   Note: *To remove tag(s) from a contact, follow these steps:*

   1. *Select a contact from **Contacts** section and click **Assign Tag.***

   2. *In the **Tag Contacts** prompt, deselect the desired tag(s) and click **Save**.*

Device List

Device List section displays a list of enrolled devices with their details.

The following details are displayed in this section:

- Name

- Email Id

- Platform

- Device Model

- App Version

- UUID

- Serial Number

- Last Login At

| Contacts	🗑 Delete	🔻 Filter	↻ Refresh						Search
📣 Announcements	**Name** ⬍	**Email Id** ⬍		**Platform** ⬍	**Device Model** ⬍	**App Version** ⬍	**UUID** ⬍	**Serial Number** ⬍	**Last Login At** ⬍
🏷 Tag Management	Bailie Keeney	bournel@dhpostable.com		Android	Lenovo TB-7504X	3.1.1	5bc8f097kk25f2fc	HAG27DYM	Wed, 30 Mar 2022 04:56:20 GMT
📱 Device List	Asus	0x000fc03@astrocontacts.com		Android	ASUS_X00TD	3.1.1	6b71c57bh7x05xf9	C9r4GFQ8Y80906G	Thu, 31 Mar 2022 02:48:32 GMT

Admin can perform following actions in **Device List** section:

Actions	Description
🗑 Delete	Delete device details from the list and restrict app access for that device/user.
↻ Refresh	Refresh device details

Actions	Description
⚲ Filter	Filter the users based on the following options: • Contact Users – Users who have manually enrolled to the **Web Console** using credentials. • COSU Users – Users who have enrolled by scanning the QR Code.
Search	Search for a specific data from the list

Admin User List

This section will list Admin and Sub-Admins of the account with their details.
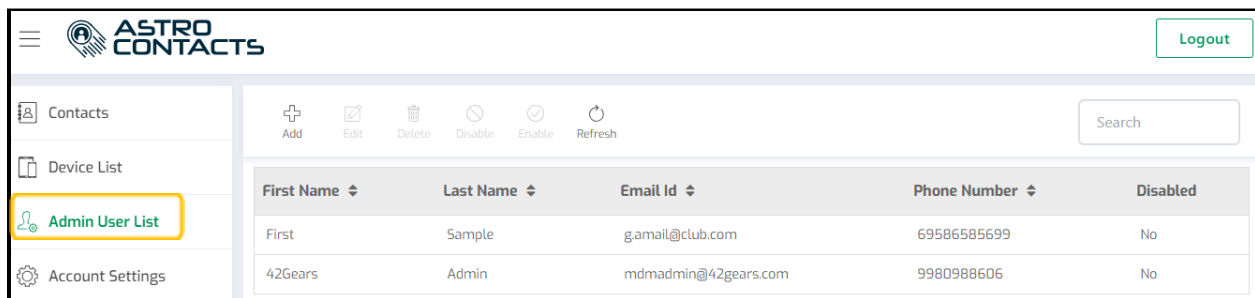
Two types of users who will have access to **Web Console** are:

- **Admin** - There can be only one admin user for an account

- **Sub-Admin** - There can be more than one Sub-Admin for an account

Following options are available in **Admin User List** section:

Actions	Description
✛ Add	Add a new Sub-Admin to the account.
✎ Edit	Edit user details

Actions	Description
	Note: *Admin details cannot be edited.*
🗑 Delete	Delete a Sub-Admin ***Note:*** *Admin can delete the Sub-Admin(s) but a Sub-Admin cannot delete an Admin.*
⊘ Disable	Disables a Sub-Admin from accessing web console.
⊘ Enable	Enables the disabled Sub-user
↻ Refresh	Refresh user details
Search	Search for a specific data from the list

Add a Sub-Admin

To add a Sub-Admin, follow these steps:

1. Login to **AstroContacts Web Console**.

1. Select **Admin User List** from the left panel.

2. Click **Add.**

3. On **User Details** prompt, enter the following details:

   - First Name

   - Last Name

   - Email Id

   - Phone Number

- Password

4. Click **Save** to complete.

   On successful enrollment to the account, Sub-Admin will receive an intimation by email.

Account Settings

This section provides account management options such as enterprise name, license details, device enrollment and customization of fields.

Company

This section displays the company details and admins can modify the details.

- **Customer ID** - Displays the **Customer ID**.

- **Company Name** - Admin can edit the **Company Name**.

- **Maximum Device Login Allowed Per Contact** - Admin can select the maximum number of devices allowed for login.

- **Receive Weekly Overview Usage** - Enable this option to receive weekly usage report.

- **Receive Weekly Device Notification for Newly Added Contacts** - Enable this option to receive weekly notification for the newly added contacts.

- **Delete Account** - Use this option to delete your **AstroContact** account.
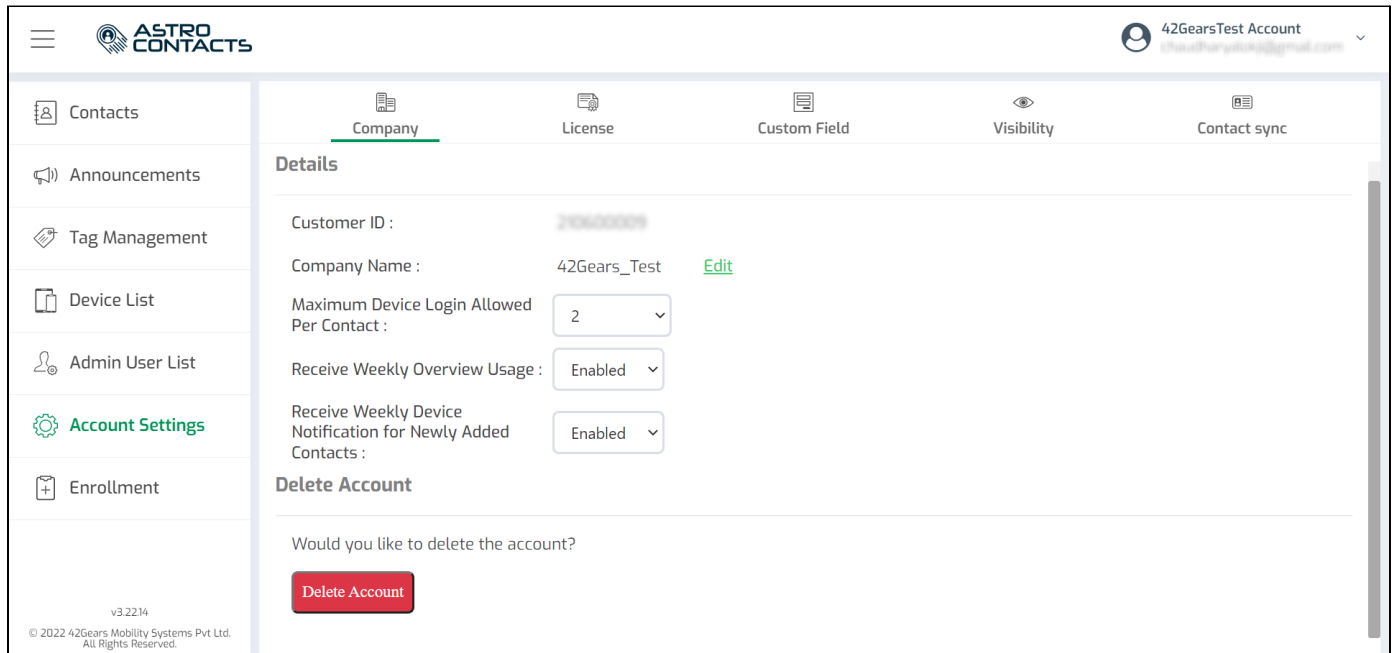
License

License option provides the details of Device License (No. of free device licenses, No. of Consumed device licenses) and Contact License (No. of free contact licenses, No. of consumed contact licenses).

Buy Subscription

To place an order for converting trial account into a paid account, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Account Settings** from the left panel and click on **License.**
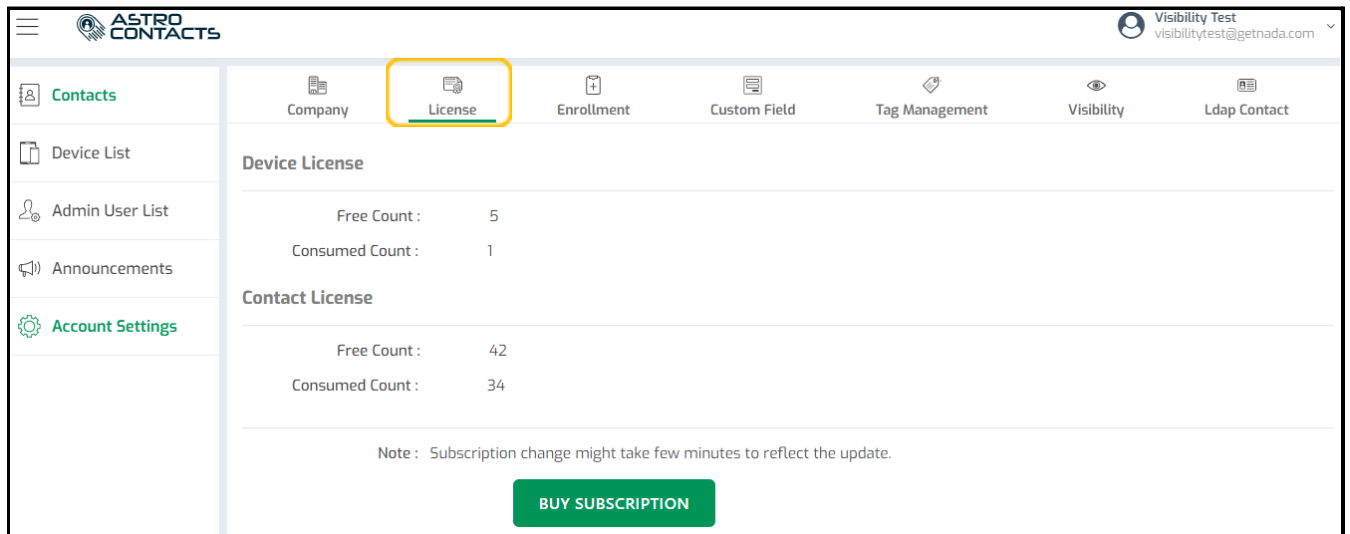
3. Enter the number of licenses to update in **Purchased License Account.**

4. Click **Buy Subscription.**

   A form appears for the user to fill their required enterprise details.

5. On **42Gears: Enterprise Contact Management** page,

   a. Under **Configure Your Plan,** edit the desired number of licenses, if required.

    Note: *Click* *to know the pricing details of licenses.*

   Once desired licenses number is entered and click **Update Totals,** on the right panel, under

   Plan Summary the total cost and renewal date for the licenses will be displayed.

   b. Enter the **Coupon Code**, if available and click **Apply Code**.

   c. Enter the following details under **Customer Information** section:

   - First Name

   - Last Name

- Email Address

- Phone

- Organization

d. Enter the following details under **Billing Information** section:

- First Name on Account

- Last Name on Account

- Card Number

- CVV

- Expiration Month

- Expiration Year

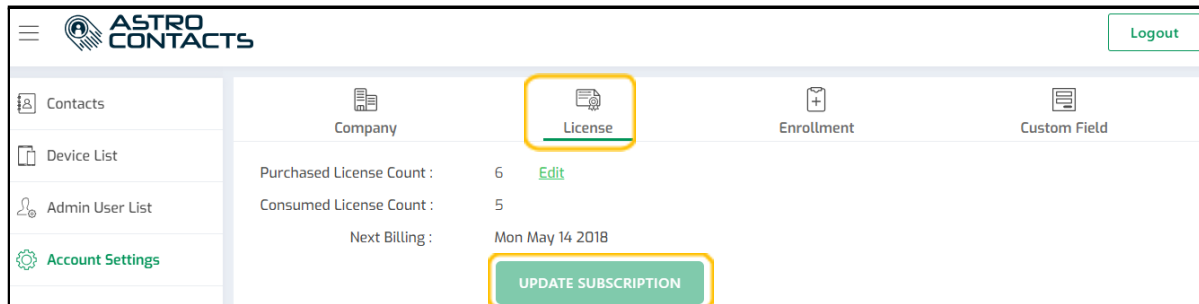- Billing ZIP Code

e. Enter the details under **Billing Address**.

6. Click **Place My Order** to complete.

The specified number of licenses will be updated to the account.

Update Subscription

To place an order for updating licenses for an existing account, follow these steps:

1. Login to **AstroContacts Web Console**.

2. Select **Account Settings** from the left panel > **License.**

3. Enter the number of licenses to update in **Purchased License Account.**

4. Click **Update Subscription.**

   Licenses will be updated in the account and the payment for updating licenses will be charged in the next cycle.

Custom Field

Admin can use **Custom Field** tab to add new fields and delete existing fields in the **Contacts** section.

To add desired field in **Contacts > Add** section, follow these steps:

1. Login to **AstroContacts Web Console**.

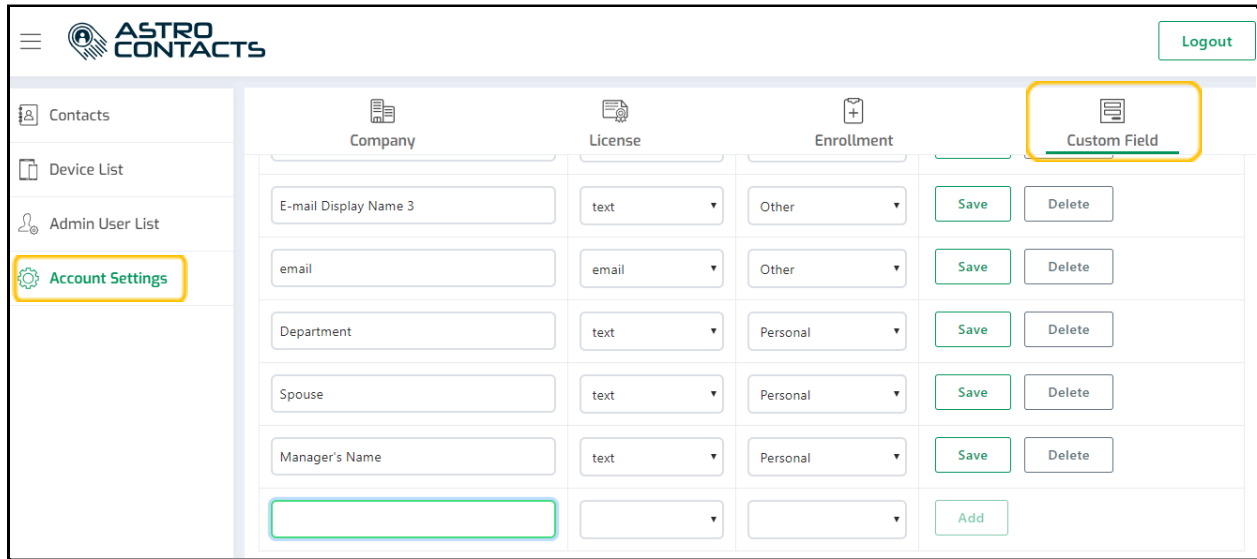2. Select **Account Settings** from the left panel > **Custom Field.**

   All the fields available in **Contacts** section (under different categories) will be displayed.

    Note: Admin can directly edit or delete the fields.

3. On the **Custom Field** screen, move down till the last row of fields.

   An empty row of fields will be visible.

4. Enter **Field Name** and select the appropriate options for **Field Type** and **Category.**

5. Click **Save.**

   Newly added field will be listed under **Contacts > Add > Category** section**.**

Visibility

Visibility tab lists contacts' profile data fields and features. Admin can customize the view of the settings for both console and **AstroContacts** mobile app.

Admin can allow or restrict the settings under following options on the AstroContacts mobile app:

- Personal

- Address

- Contact

- Company

- Other

- Tags

- Announcements

- Device Settings

- **Manual contact sync to phone book** – Allows the users to copy all the contacts additions and modifications from **AstroContacts** mobile app to the native phone book app on manual sync.

- **Auto contact sync to phone book** – Allows the users to copy all contact additions and modifications to the native phone book app automatically.

- **Unsync contacts from phone book** – Allows the users to remove all the synced contacts of **AstroContacts** app from native phone book app.

- **Overwrite Contacts in phone book** – Allows the users to remove the duplicate contacts with same email address/phone number/first name/last name/middle name from the native phonebook on contact sync.

- **Contact's call button** - Allows/restricts calling option for the added contacts on the **AstroContacts** app.

- **Contact's message button** – Allows/restricts messaging option for the added contacts on the **AstroContacts** app.

- **Contact's email button** – Allows/restricts email option for the added contacts on the **AstroContacts** app.

- **Selected Contact's sync** – Allows the users to copy only the contacts specified in selected tags to the native phone book app.

- **Device Name** – Allows/restricts the users from displaying the device name in the **AstroContacts** app.

- **Logout option** – Allows/restricts the users to log out from the **AstroContacts** app.

    After making the required changes to visibility of profile data fields and features, admin can decide to:

    Apply Changes - On click, the visibility changes will be applied on Console / Device.

    Clear Changes - On click, clear the changes that are made recently but not applied on the Console/Device.

    Restore Defaults - On click, restores to the default settings.

Sync Contacts to the Web Console

Admins can sync bulk contacts to the Web Console in following three ways:

1. Using **CSV** file
2. Using **LDAP** Account
3. Using **Azure AD** Account

Using LDAP Account

Lightweight Directory Access Protocol (LDAP) is a client/server based protocol used to access and manage directory information. It helps locating files and devices in a network connected to the Internet or corporate intranet.

42Gears allows admins to sync contacts directly from an LDAP account. It helps admins to import or automatically sync LDAP contacts to the **AstroContacts Web Console** and makes it easy for them to manage these contacts.

*Note: For LDAP contacts sync to work **AstroContacts Web Console** should be able to reach the LDAP server over the internet.*

To directly sync contacts from LDAP account, following two processes have to be executed.

- Setup LDAP configuration in AstroContacts Web Console

- Import contacts From LDAP Server

Setup LDAP configuration in AstroContacts Web Console

To setup LDAP configuration in **AstroContacts Web Console**, follow these steps:

1. Login into **AstroContacts Web Console.**

2. Click **Account Settings** > **Ldap Contact**.

3. Configure the LDAP settings:

  – **Host** – IP address of the LDAP server

  – **Port** – Port number of the server

  – **Base DN** – Inner path to fetch LDAP contacts

  – **Security Level** – Select an option to authenticate LDAP account:

  – **Authentication** – Configure credentials to access LDAP account

  – **Anonymous** – Access LDAP account without credentials

  – **Auto Sync Enable** – Turn-On this option to periodically copy all the existing contact modifications from LDAP server to the **AstroContacts Web Console** every 6 hours.

– **Auto Add LDAP Contacts** – Once enabled, the newly added contacts will be automatically synced to the **AstroContacts Web Console** depending upon the number of licenses available for the account.

For Example: If an enterprise has LDAP account with 1000 contacts and 100 AstroContacts licenses, then you can sync only 100 contacts from the LDAP server.

*Note: This feature will work only when **LDAP Attribute** is mapped with **Astro Attribute** and has imported at least one contact.*

4. Click **Test Connection** to confirm the authentication.

5. Click **Save** to save the LDAP configuration.

Import Contacts From LDAP Server

To import contacts from LDAP server, follow these steps:

1. Navigate to **AstroContacts Web Console**.

2. Click **Contacts** > **Import** > **LDAP CONTACTS.**

3. Click **Yes** to accept for importing.

4. In **LDAP Contacts** prompt, select an option for **Unique ID** from the drop-down menu (This is the **unique identifier** for **AstroContacts** which will be considered while importing contacts from LDAP server).

5. Select an option from **LDAP Attribute** drop-down to map with **Astro Attribute**.

6. Select an option from **Astro Attribute** drop-down menu**.**

Note: Attributes are objects which hold values like first name, last name etc. and It is mandatory to map Astro Attribute First Name with LDAP Attribute.

7. Click **Show/Hide Not Imported LDAP Attribute** to view LDAP attributes that are not mapped with

Astro Attributes.

Once done, the LDAP contacts will be synced to **AstroContacts Web Console** and these contacts will

be listed as contact in **Contacts** section and admins will be able to access and manage LDAP contacts

like any other contacts using the **AstroContacts Web Console** which will automatically reflect on

logged in devices.

Using Azure AD Account

Azure Active Directory (AD) offers a faster, secure, and scalable user database for the corporate

environment. It is a convenient way for IT admins to manage a large number of users.

AstroContacts allows IT admins to sync the user information and contacts of the users who have an

account in an **Azure Active Directory** domain.

To directly sync contacts from Azure AD account, following two processes have to be executed.

- Setup Azure AD contacts in AstroContacts web console

- Import contacts from Azure AD server

Setup Azure AD in AstroContacts Web Console

To setup Azure AD configuration in **AstroContacts Web Console**, follow these steps:

1. Login into **AstroContacts Web Console.**

2. Click on **Account Settings > Contact sync > Azure AD.**

3. Please enter the following details in the appropriate fields.

- **Application (client) ID**

- **Directory (tenant) ID**

- **Client credential**

Note: For more information about **Application (client) ID,** **Directory (tenant) ID,** and **Client credential,** *check out this* *Knowledge Base Article.*

4. Configure the following settings and click on **Save And Authorize.**

- **AutoSync Enable** – Turn-On this option to periodically copy all the existing contact modifications from Azure AD server to the AstroContacts Web Console every 6 hours.

- **Auto add Azure AD contacts** – Once enabled, the newly added contacts will be automatically synced to the **AstroContacts Web Console** depending upon the number of licenses available for the account.

This will redirect to the Microsoft consent page and admin can login using the **Azure AD** credentials.

5. Click on **Test Connection** to confirm the authentication.

6. Click **Save** to save the **Azure AD** configuration.

Import Contacts From Azure AD Server

To import contacts from **Azure AD** server, follow these steps:

1. Navigate to **AstroContacts Web Console.**

2. Click **Contacts > Import > AZURE AD CONTACTS**.

3. Click **Yes** to accept for importing.

4. In **Azure AD Contacts** prompt, select an option for **Unique ID** from the drop-down menu (This is the **unique identifier** for **AstroContacts** which will be considered while importing contacts from Azure AD server).

5. Select an option from **Azure AD Attribute** drop-down to map with **Astro Attribute**.

6. Select an option from **Astro Attribute** drop-down menu.

Note: *Attributes are objects which hold values like first name, last name etc. and It is mandatory to map Astro Attribute First Name with Azure AD Attribute.*

7. Click **Show Not Imported Azure AD Attribute** to view Azure AD attributes that are not mapped with **Astro Attributes.**

8. Select the contacts and click on **Import.**

   Once done, the **Azure AD** contacts will be synced to **AstroContacts Web Console** and these contacts will be listed as contact in **Contacts** section and admins will be able to access and manage **Azure AD** contacts like any other contacts using the **AstroContacts Web Console** which will automatically reflect on logged in devices.

COSU Enrollment

Admin can enroll the device to **AstroContacts Web Console** instantly by scanning a **QR Code** using a mobile device.

To enroll a contact using Scan QR Code, follow the steps under Login to AstroContacts app using Scan QR Code.

Chapter 4: AstroContacts Mobile Application

Once the user login to **AstroContacts** mobile application, the contacts will be displayed in the mobile

device as shown below.
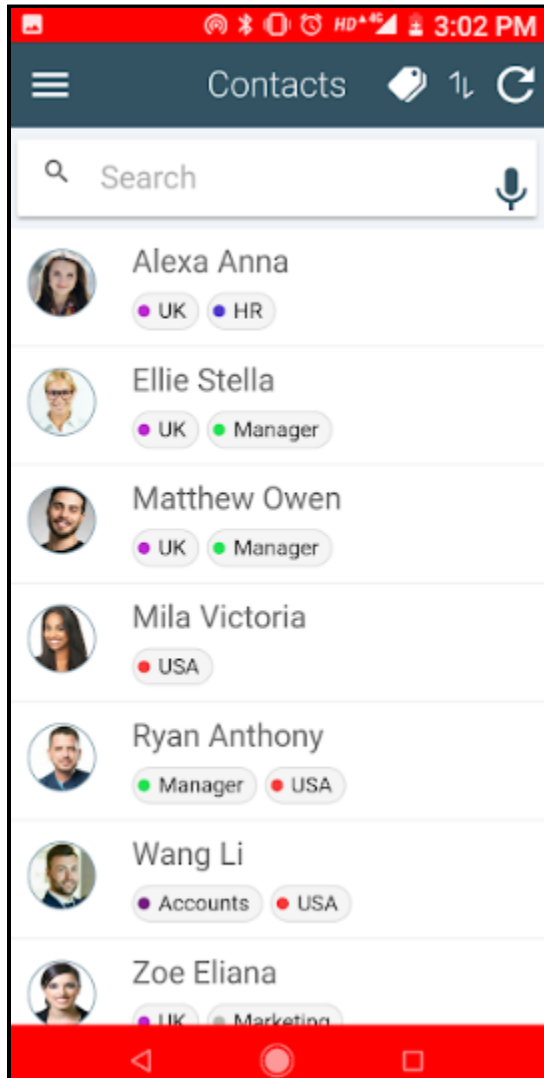
Following settings are available in **AstroContacts** mobile app:

Settings	Description
Tags	Displays the contacts associated with the selected tag(s).

|	
🔼🔽 Sort	Sort the contacts based on the following options: ● First Name A to Z ● First Name Z to A ● Last Name A to Z ● Last Name Z to A
💬 **Message**	Allow users to send messages to the selected contacts.
✉️ **Email**	Allow users to send emails to the selected contacts.

☰
Options
	The following settings are available under **Options:**
	
	● 👥 Contacts - Navigate to contacts listing page.
	
	● 📢 Announcements - Displays messages or notifications received from admin or **AstroContacts** Web Console.
	
	● 🔄 Contact Sync - Copies all contacts available in **AstroContacts** mobile app to native phonebook app on manual sync. See Sync Contacts to the Phonebook app.
	
	● 🏷️ Filters - Filter the contacts based on the tag(s) selected. See Filter Contacts.
	
	● ⚙️ Settings - The settings allowed by admin on the Web Console will be enabled for the user to configure on the **AstroContacts** app. Following options are available in **AstroContacts** app **Settings**:
	
	    ● Change Name
	    ● Auto Sync
	    ● Unsync
	    ● Auto remove duplicates
	    ● Sync contacts of specific tags
	    ● Logout

Change Device Name in AstroContacts app

The user will have the option to change or edit his/her device name in the **AstroContacts** app only when the contact is enrolled through scanning the QR Code and **Device Name Type** is selected as **Manual**.
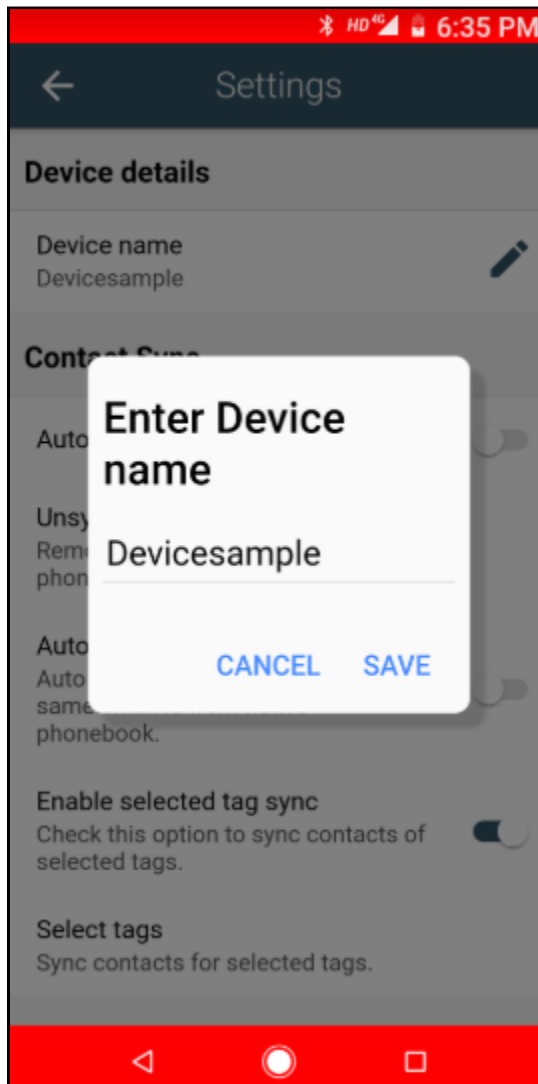
To change the device name in **AstroContacts** app, follow these steps:

1. Login to **AstroContacts** application Using Scan QR Code.

   On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:
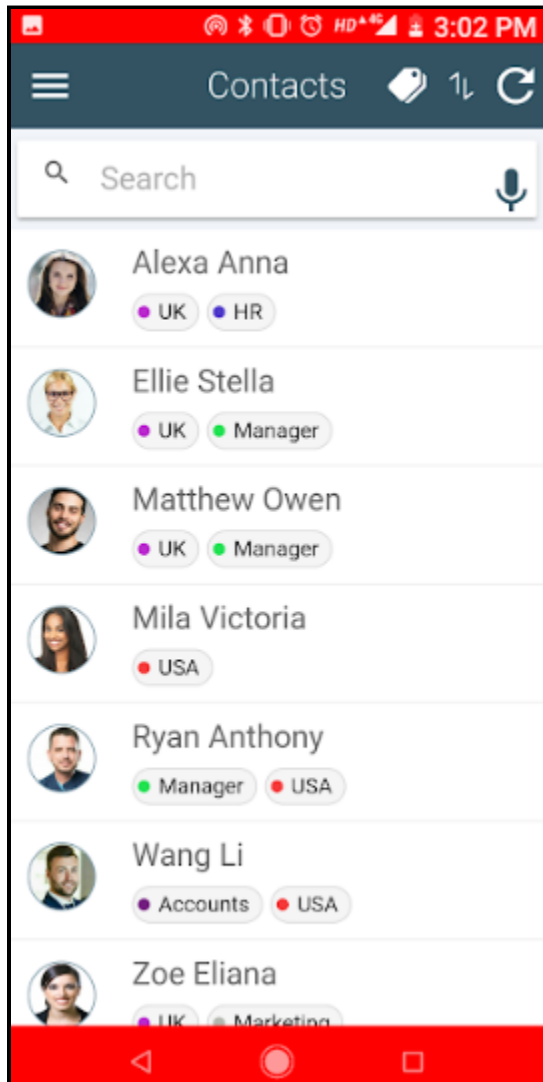
2. Tap ☰ **Options** > **Settings.**

3. In **Settings** screen, tap edit icon in **Device Name.**

4. Enter the **Device name** and tap **Save.**

The new **Device Name** will start reflecting in the **Web Console** as well as on the **AstroContacts** apps of all enrolled users.

View Announcements

Once an announcement is composed and saved in **AstroContacts Web Console**, users will receive a notification under the **Announcement** section of **AstroContacts** mobile app. Users can view all the messages / notifications received from **AstroContacts Web Console**. Pinned announcements will reflect on top of the announcement list.

Filter Contacts

The user can filter the contacts based on the specific selected tag(s). The contacts associated with the tags will be listed on the device screen.

To filter the contacts in **AstroContacts** app according to the assigned tag, follow these steps:

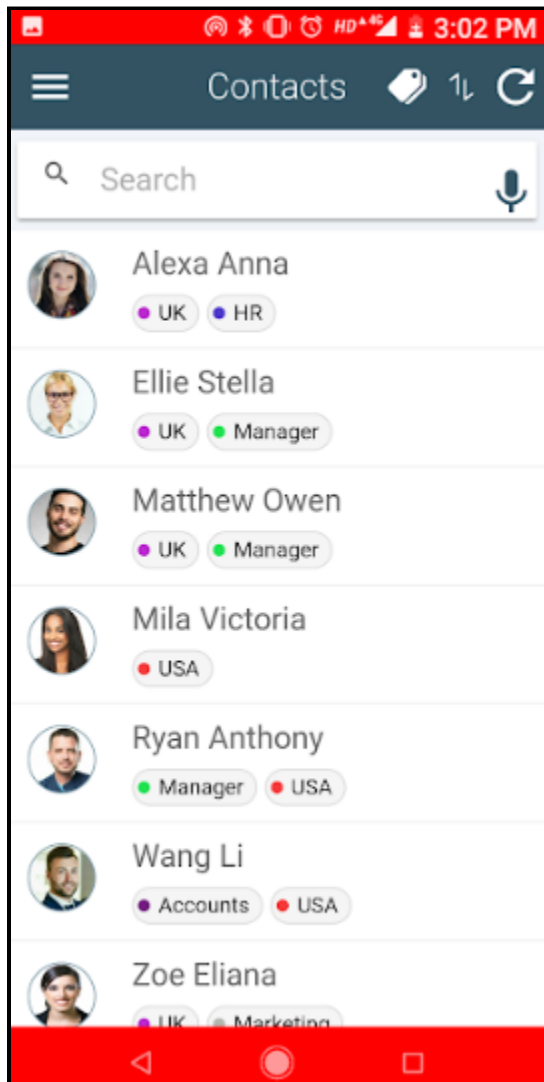1. Login to **AstroContacts** application:

    ● Using Credentials

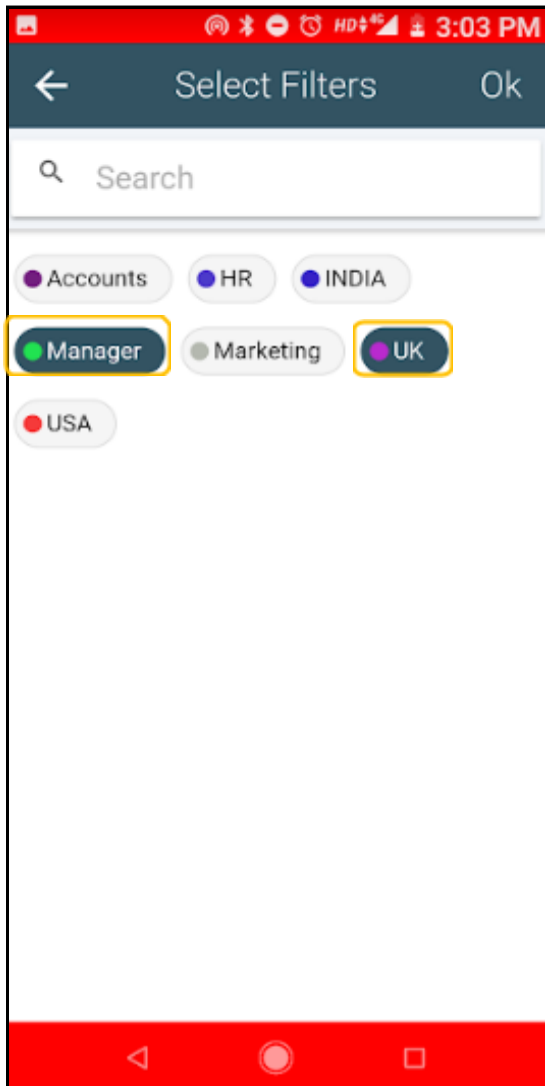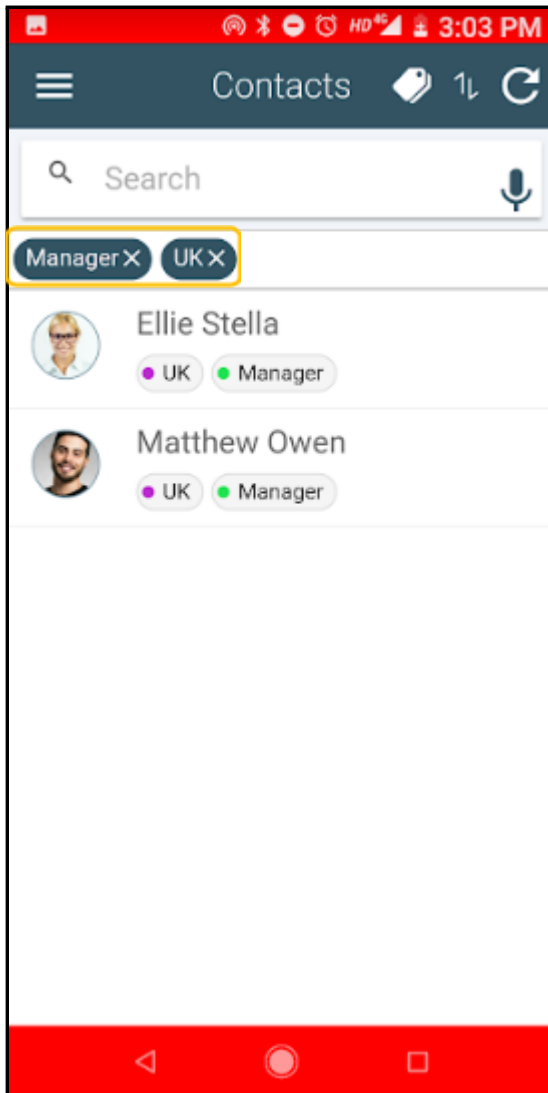   or

    ● Using Scan QR Code
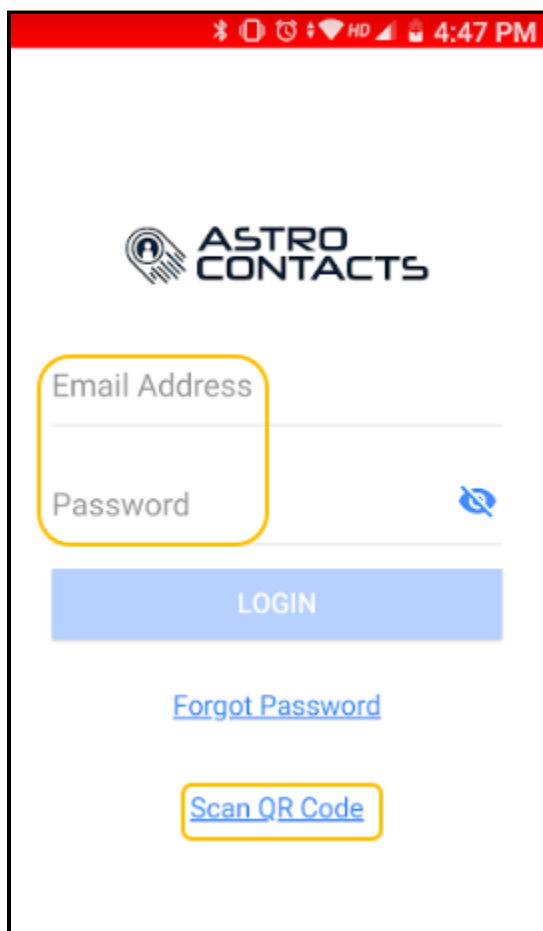
On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:

2. Tap ▤ **Options** > **Filters.**

3. On the **Select Filters** screen, select tag(s) and tap **Ok.**

The contacts associated with the selected tag(s) will be listed as shown in the screenshot below:
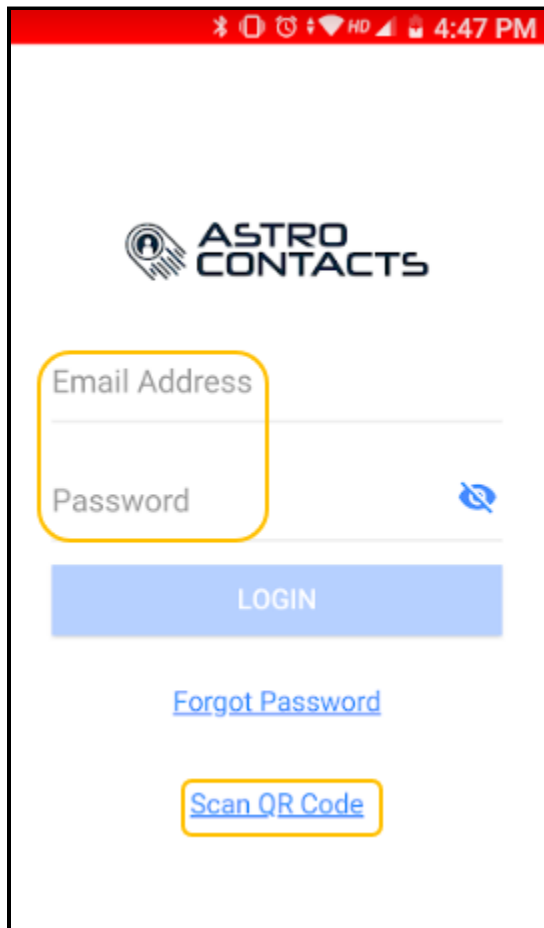
Sync Contacts to the Phone book app

This setting once enabled will copy all the contacts from **AstroContacts** app to the native phone book.

The user can sync the contacts addition and modifications to the phonebook app only when the admin has allowed **Manual contact sync to phone book** option in Visibility section on **AstroContacts Web Console**.
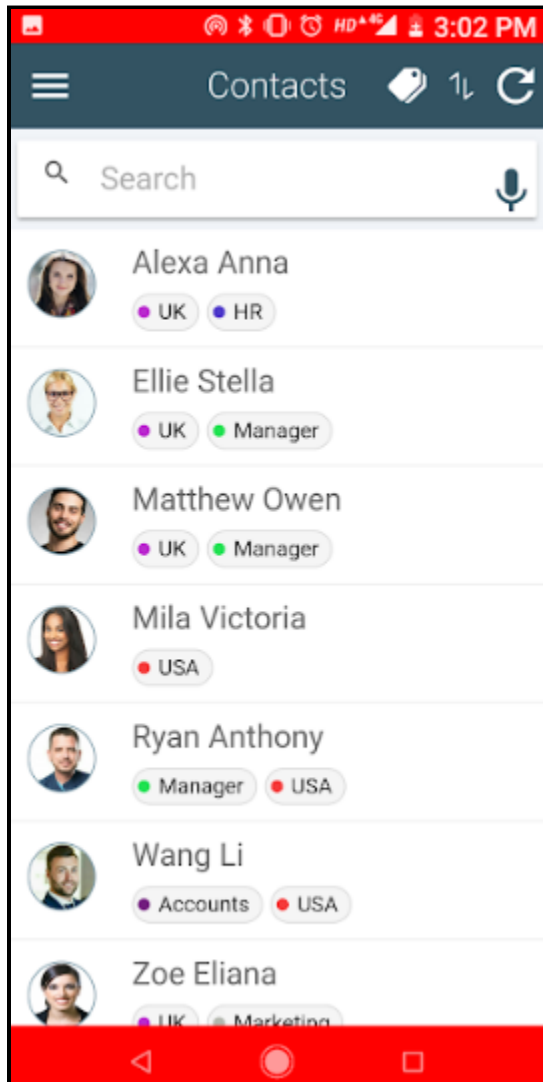
To sync all contacts addition and modifications to the phonebook app manually on the device, follow these steps:

1. Login to **AstroContacts** application:

    - Using Credentials

        or

    - Using Scan QR Code

On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:

2. Tap ☰ **Options** > **Contacts Sync.**

All the contacts additions and modifications in **AstroContacts** app will be copied to the native phonebook app.

## Auto Sync Contacts to the Phonebook app

When Auto Sync option is turned ON, it will copy all contact additions and modifications to the native phonebook app without requiring the end user to initiate contact sync manually.

The user can auto sync the contacts to the phonebook app only when admin has allowed **Auto contact sync to phone book** option in the Visibility section on AstroContacts **Web Console**.
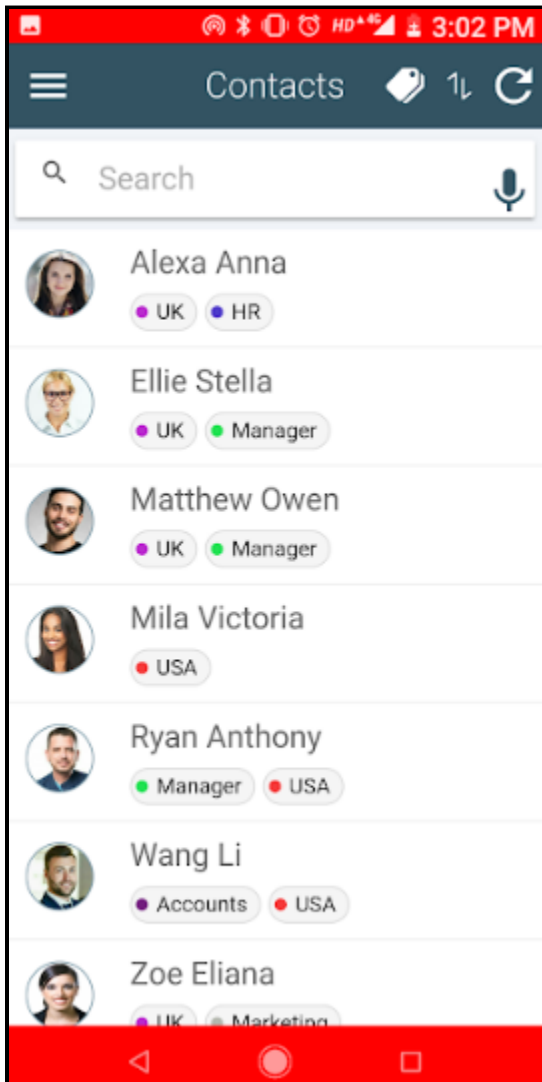
To copy all contacts to the phonebook app automatically on the device, follow these steps:

1. Login to **AstroContacts** application:

    - Using Credentials

             or

    - Using Scan QR Code
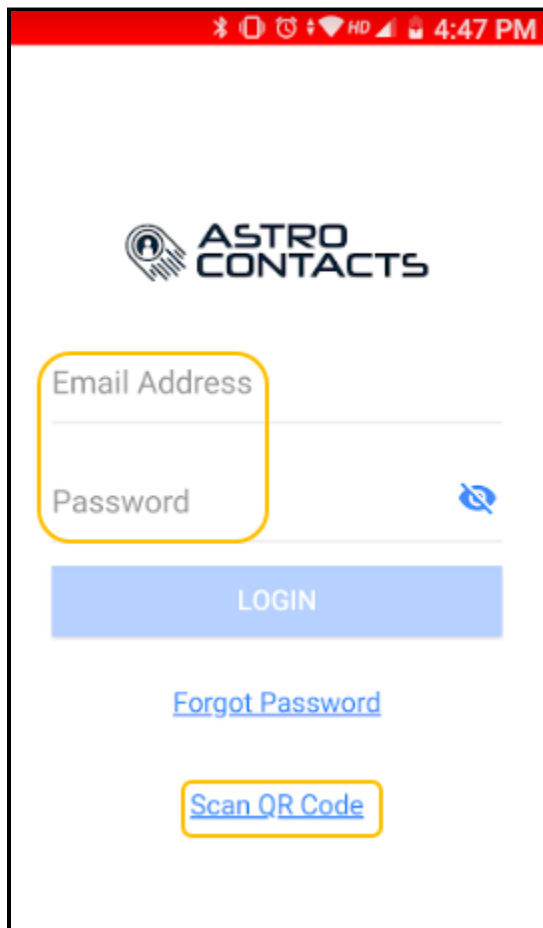
On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:

2. Tap ☰ **Options** > **Settings** and turn-on **Auto Sync** option.

This will enable automatic syncing of all additions/modifications made to the contacts in

AstroContacts app to the phonebook app.
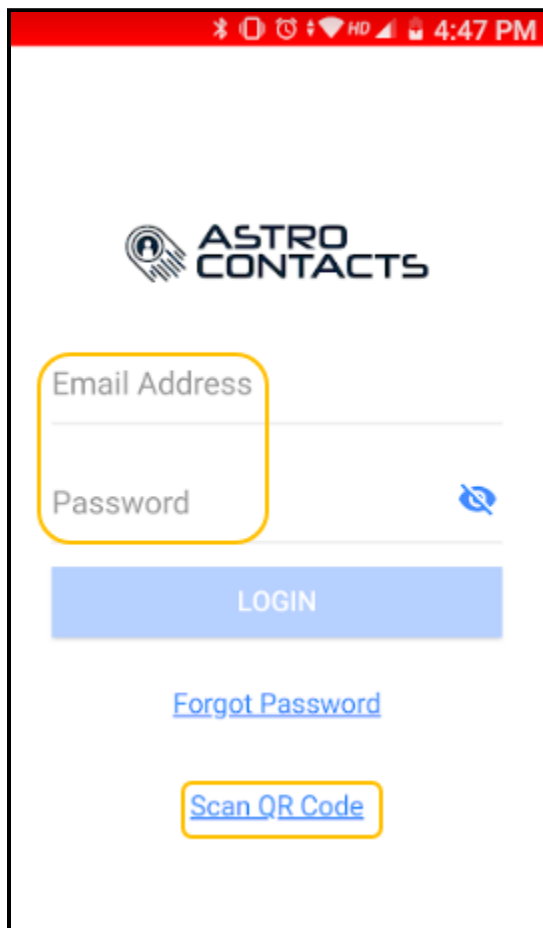
Unsync the Contacts from Phone book app

This feature once enabled will remove all synced contacts from the phonebook app on contact

syncing.

The admin can enable this action by allowing **Unsync contacts from phone book** option in Visibility

section on **AstroContacts Web Console**.

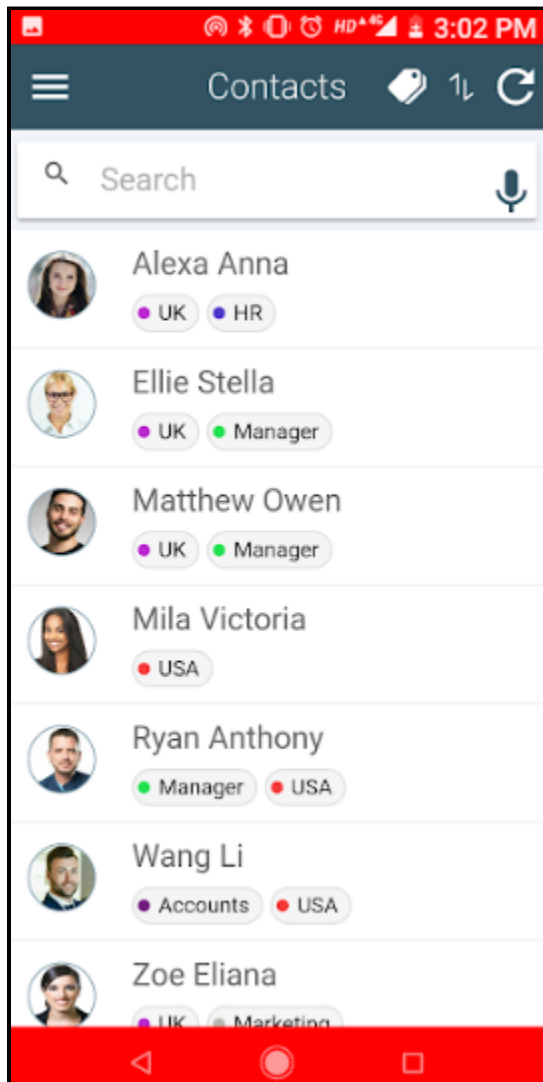To remove all contacts from the phone book app on a contact unsync, follow these steps:

1. Login to **AstroContacts** application:

    ●   Using Credentials

         or

    ●   Using Scan QR Code

On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:

2. Tap ☰ **Options** > **Settings** > **Unsync** option.

The synced contacts from **AstroContacts** app on the phone book app will be removed.

Auto remove duplicates from phonebook app

When this option is turned ON, duplicate contacts with same email address will be automatically removed from the native phonebook on contact sync.

Note: *The new/existing contact in the phone book with same email address as in **AstroContacts** app will be removed on contact sync.*

This action is enabled only when admin allows **Overwrite contacts in phone book** option in Visibility section on **AstroContacts Web Console**.
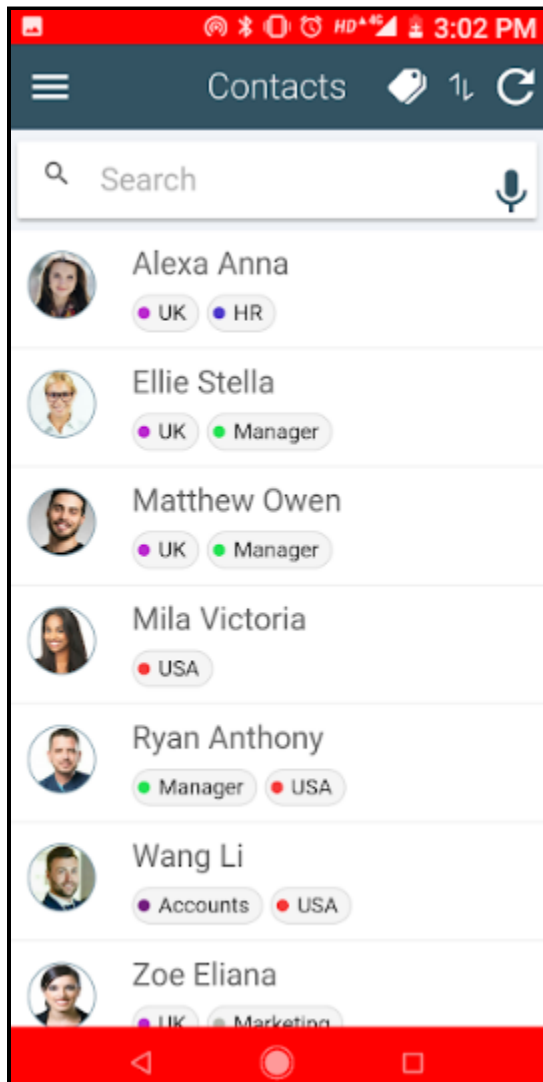
To remove the duplicate contacts automatically from the phonebook app, follow these steps:

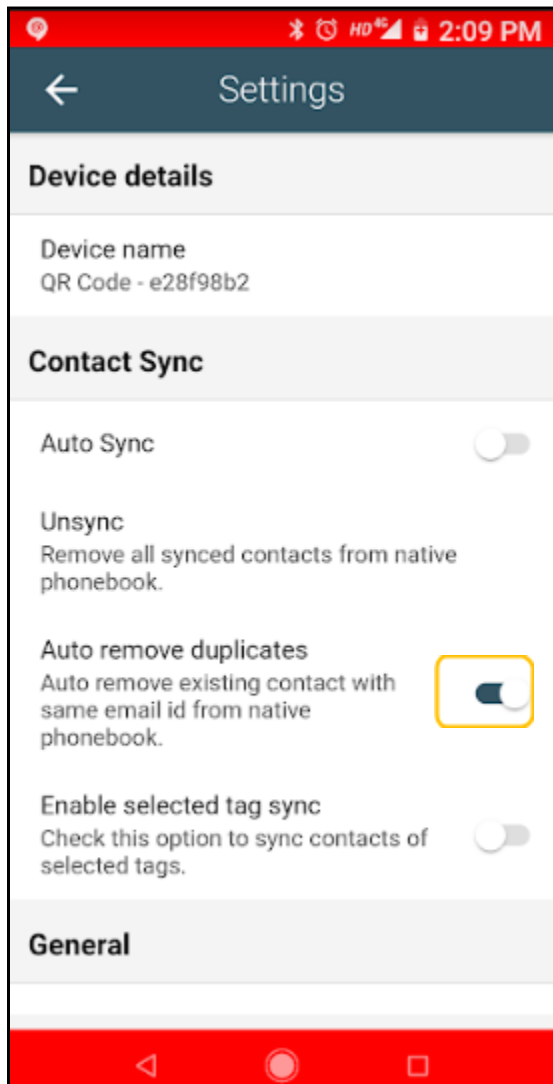1. Login to **AstroContacts** application.

    ● Using Credentials

        or

    ● Using Scan QR Code
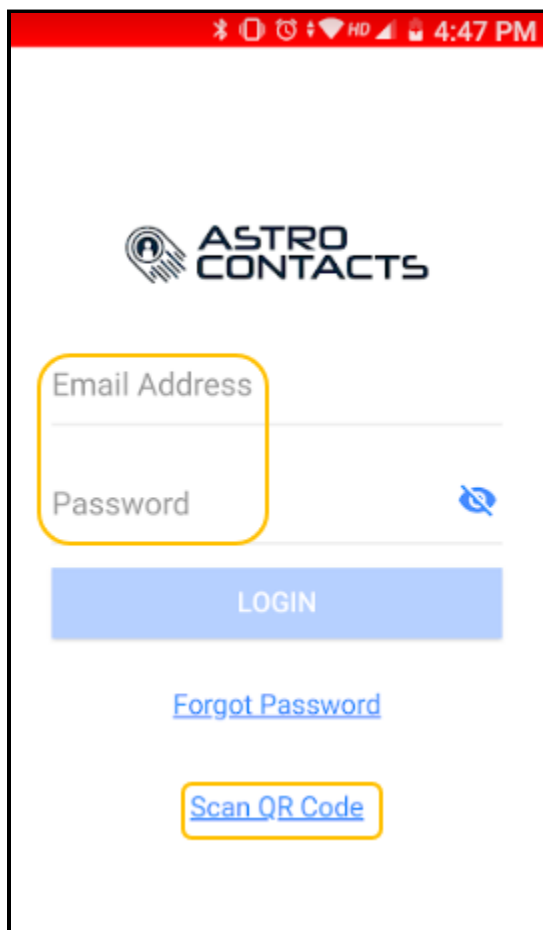
On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot

below:

2. Tap ▦ **Options** > **Settings** and turn ON **Auto remove duplicates** option.

The duplicate contacts with same email addresses will be removed from the phonebook app on contact sync.

Sync Contacts of specific tags to the Phonebook app

This setting once enabled will allow copying of contacts with selected tags from **AstroContacts** app to the native phone book app. If an employee wants to copy only the contacts of a specific group to his/her phone book app, he/she can select a tag, and sync only those contacts specified in selected tag(s) to his/her phone book app. See Create a tag and Assign Tag(s) to Contacts.
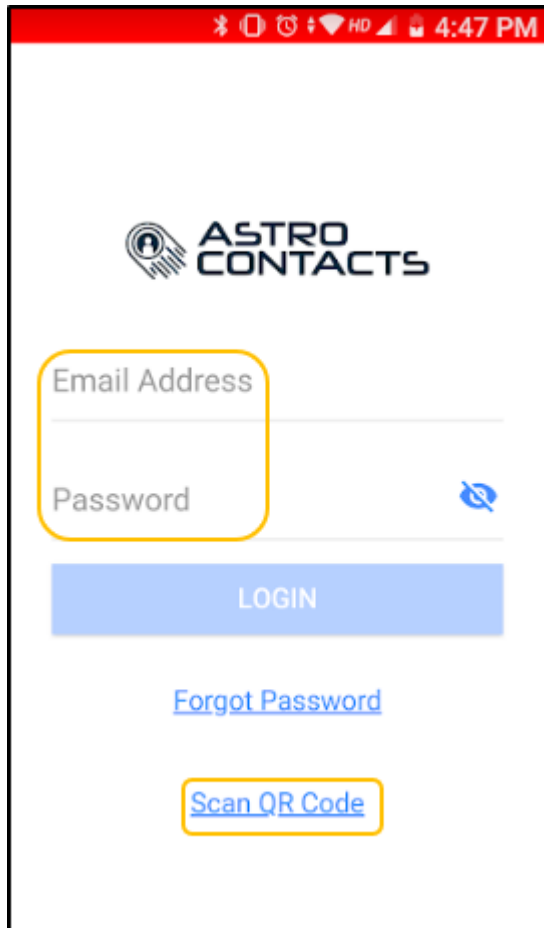
The user can copy the contacts specified in selected tag(s) to the phonebook app only when admin has allowed **Selected contacts sync** option in Visibility section on **AstroContacts Web Console**.

To sync only those contacts with specific tags to the phone book from **AstroContacts** app, follow these steps:

1. Login to **AstroContacts** application:

   - Using Credentials

        or

   - Using Scan QR Code

On successful login to **AstroContacts** app, the contacts will be listed as shown in the screenshot below:

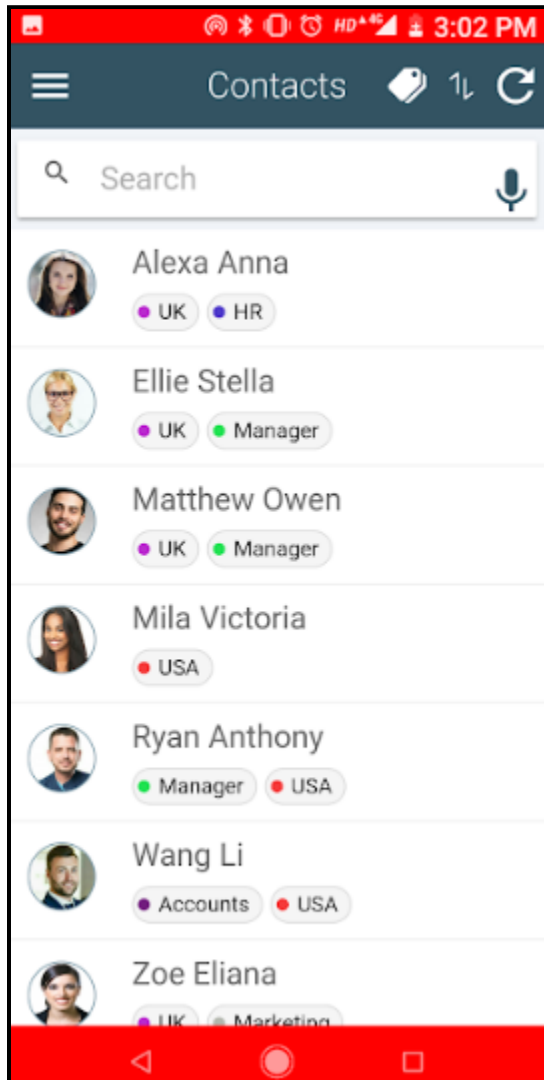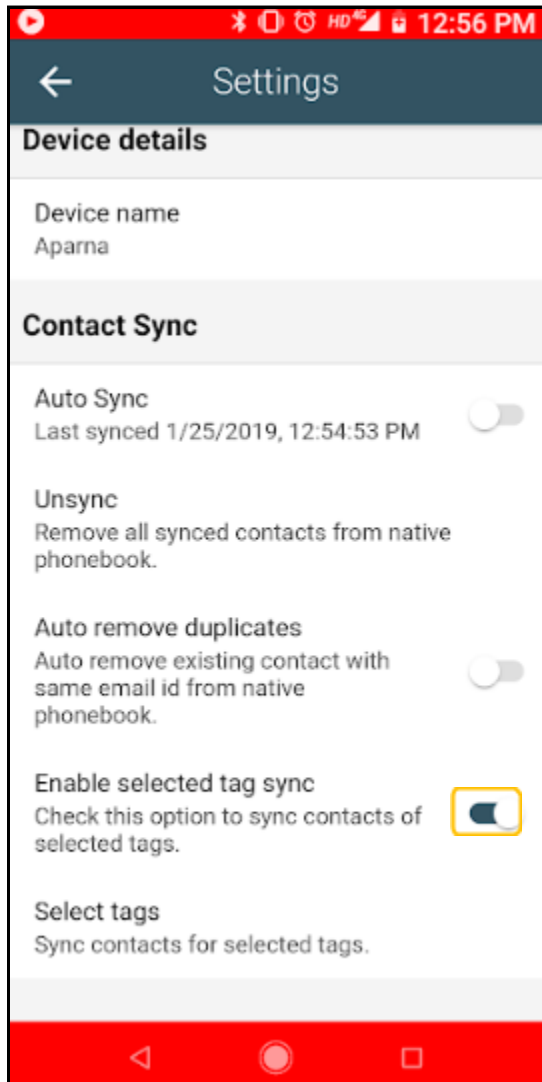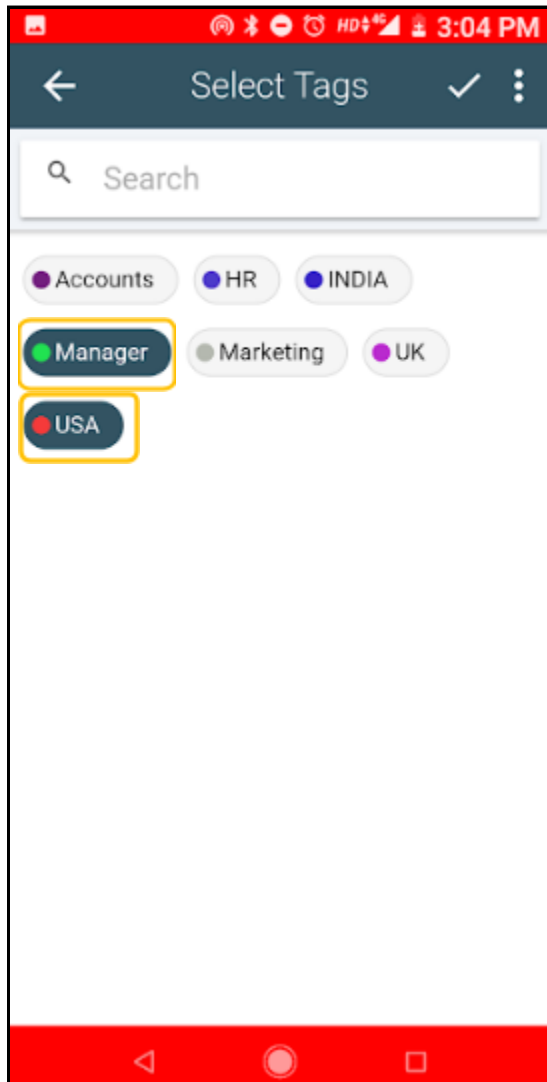2. Tap ☰ **Options** > **Settings** and turn ON **Enable selected tag sync.**

3. Tap **Select Tags.**

4. On the **Select Tags** screen, select the required tag(s) from the list and tap ☑ to complete.

The contacts associated with the selected tags only will be synced to the native phone book.