USER GUIDE

# Complete guide: QR vCard Pro

Every feature and setting: what each option does, where it is, who can use it, which plan it needs and an example of use.

53 chapters in 9 parts, troubleshooting and a glossary.

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# 1. What the software is and how it is organized

**Where:** QR vCard Pro → Complete guide; on the portal: *Complete guide* | **Who:** all users | **Plan:** all plans

> Have you just started using QR vCard Pro and want to know exactly what you get? A digital business card for every person in your company, with a short link and a QR code, that runs on your own website and keeps its data in your own database.

QR vCard Pro is a WordPress plugin that creates a card for each person: a mobile page with their name, photo, position, phone numbers, email addresses, websites and social networks. Visitors open it by scanning the QR code or clicking a link, with no app and no sign-in. With one tap they can call you, send you an email, find your address on a map or, with the *Save contact* button, add your contact to their phone's address book.

Around the card are tools for what happens after the meeting: collecting visitor contacts, analytics, an email signature, a virtual background for video meetings, NFC cards, working with employees and connecting to other systems. Which of them are available depends on your license plan.

### How are the card, the short link and the QR code connected?

When a card is saved for the first time, it gets a permanent short address in the form `your-site.com/q/Rm4xT9`: the `/q/` marker is followed by six letters and digits. These addresses do not use characters that are easily confused, such as 0 and O or 1, l and I, so the address can also be typed in by hand without mistakes. The card's QR code contains only this address, not your data. That is why you can change your data whenever you like, and a QR code that has already been printed still opens the up-to-date card.

The address does not change when you change the name, company or appearance of the card. The card is publicly available only while it is published; if you switch it to draft or delete it, its address and QR code show the “QR card not found” page. More on this in Card list, statuses, deletion and limits.

### Where you work: wp-admin and the QR portal

**wp-admin**

The WordPress administration of your site, the QR vCard Pro menu. Only the Administrator works here: activates the license, changes settings, edits all cards, runs imports and connects integrations. The first menu item is *Home*, an account overview with shortcuts to all sections (Admin menu and Home).

**QR portal**

A separate page on your site, at `https://your-site.com/qr-portal/`, with its own sign-in. Everyone works on the portal: Administrator, Card Manager, Employee and Team member. The portal also opens in a phone browser, so you can edit a card while you are out in the field (QR portal: screens and who sees what).

Card Managers, Employees and Team members work only on the portal. When they try to open wp-admin, the software sends them back to the portal, and the WordPress toolbar at the top of the site is not shown to them. The Administrator opens the portal with the *QR Portal access* button on Home or directly through the portal address.

### Where is the data stored?

Cards, visit statistics and the contacts that visitors leave are stored in your WordPress site's database, not on the vendor's server. Data leaves the site only when you turn on a feature that requires it:

- *Auto-translate*, the AI assistant and the paper business card scanner send text or an image to OpenAI, using a key you enter yourself;
- the *Geo-location* option sends visitors' IP addresses to ip-api.com to determine their country and city;
- Google Wallet and Search Console exchange data with Google, and measurement and advertising tags (Google Analytics, pixels) load for card visitors only after you turn them on and, when consent is required, only after the visitor agrees;
- webhooks and Odoo send contact data to the addresses you enter yourself;
- the license server receives the license key, the site domain and the software version when it checks the license and updates.

What is recorded about visitors and how long it is kept is set in Privacy and GDPR.

**Who does what?**

- **Administrator** is the WordPress administrator of the site. Only the Administrator activates the license and changes settings; on the portal, the Administrator sees all cards and all sections.
- **Card Manager** works only on the portal. Edits all company cards and adds employees and team members, but does not change software or site settings.
- **Employee** receives a ready-made card and a one-time link for the first sign-in to the portal, where they edit only their own cards.
- **Team member** is invited through Team and has the same rights as an employee, but creates the card themselves.

The full permissions table is in Roles and permissions.

**How do you use this guide?**

The guide is divided into parts: basics, the card, contacts and measurement, team and people, personal tools, marketing, integrations, settings and help. At the top of each chapter, the **Where** row shows the path in wp-admin or on the portal, **Who** lists the roles that do the task, and **Plan** names the lowest plan in which the feature works. Every option comes with an explanation of what it changes and an example of use, and the pitfalls to watch for are in the **Watch out** boxes.

On the portal, the guide first shows the chapters that apply to your role. The *Show the full guide* button opens all chapters, and the *Search the guide* field finds a word or term in every chapter of the guide.

> **Note:** the names of buttons, fields and tabs in this guide are highlighted and written exactly as they appear on screen, so you can find them more easily.

REAL-WORLD EXAMPLE

A real estate agency has twelve agents. The owner, as Administrator, activates the license in wp-admin and sets up the logo and colors. The office manager, as Card Manager, adds the agents on the portal and updates cards when someone changes their phone number. Each agent uses the portal on their own phone to change the featured note about new apartments on offer. Nobody except the owner enters the WordPress administration, and after every change the QR codes on the signs in front of the apartments lead to the correct details.

## 2. Quick start for administrators

**Where:** setup wizard; QR vCard Pro → Settings → License; QR vCard Pro → New QR Card; on the portal: *New vCard*

**Who:** Administrator; Card Manager from the first-card step onward

**Plan:** all plans; a new card requires an active license, at least the free Personal plan

> Have you just installed the software and want a first card that works on a phone? Go through the setup wizard, activate the license, create and publish a card, then check it by scanning before you send the QR code to print.

This chapter covers only the minimum needed for the first card to be public and checked. Each step is described in detail in the chapter its link leads to. The Card Manager skips the wizard and the license, because those are the administrator's tasks, and creates the first card on the portal with the *New vCard* button.

### What happens after installation?

On a new installation, the first time you open any page from the QR vCard Pro menu, the software takes you to the setup wizard. The wizard keeps opening until you complete the last step; all other WordPress pages work normally. The data of each step is saved as soon as you move on to the next step or go back to the previous one.

1. *Welcome*: click *Let's go* →.
2. *License*: enter the key in the *License key* field and click *Activate and continue* →. If you do not have a key yet, click *Skip (stay in demo mode)*.
3. *Branding*: enter the *Portal name*, choose a *Logo (optional)* and an *Accent color*, then click *Save and continue* →. From the Single Site plan up, the same logo is also used in the center of QR codes.
4. *Privacy*: choose what is recorded about card visitors. The default values are cautious: IP addresses are anonymized, and geo-location through an external service is turned off.
5. *Language*: choose the portal language and the language of the labels on cards.
6. *EULA*: read the license agreement, check the box “I have read and accept the terms of this End User License Agreement (EULA).” and click *I accept and continue* →. The wizard does not continue without this confirmation.
7. *Ready*: check the *License status* row and click *Finish and open dashboard* →. The *All cards* list opens.

You can run the wizard again from QR vCard Pro → Settings → General. All wizard fields are described in Setup wizard.

> **Watch out:** if key activation fails in the wizard, the wizard does not report it right away; it simply moves on to the Branding step. So on the *Ready* step, check that the *License status* row reads “Active:” followed by the plan name. If it does not, activate the key again in QR vCard Pro → Settings → License. The instructions under “What's next?” on the same step mention older menu names: the first card is created in QR vCard Pro → New QR Card, and the settings are in QR vCard Pro → Settings.

#### How do you activate the license if you skipped that step?

1. Open QR vCard Pro → Settings → License.
2. In the *License key* field, enter the key in the format `QRVP-XXXX-XXXX-XXXX-XXXX`.
3. Click *Activate license*. Pressing Enter in the field does not activate the key.
4. After a successful activation the page reloads: the label in the header should read *ACTIVE*, and the *Status* row “Active”.

Without an active license, the software runs in demo mode: you can publish at most three cards, and plan features are locked. If you have not bought a plan, you get the free Personal plan with two cards through the *Start free* → button on the banner above the *All cards* list, and you activate the key you receive the same way. The differences between plans are covered in Plans, license and updates.

#### How do you create and publish the first card?

1. Open QR vCard Pro → New QR Card (in older WordPress versions the item is called *Add New*). On the portal, the *New vCard* button does the same.
2. In the *1. Profile and details* box, fill in *First name*, *Last name*, *Position / role* and *Company*, and add a *Profile photo*.
3. In the *2. Contact details* box, enter at least one phone number and one email address. The first phone number and the first email address become the *Call* and *Email* buttons on the card.
4. If you like, fill in *3. Social media* and choose colors in *4. Design and colors*.
5. Click *Publish*. The card gets a short address, and the *QR Code* box in the right column shows its QR code.

The card screen has no live preview: you see what the card looks like only when you open its address. All fields are described in the chapters from Creating and editing a card to Card list, statuses, deletion and limits.

#### How do you download the QR code?

For a screen, a presentation or an email: in the *QR Code* box, click ↓ *Download PNG*. You get a 240×240 pixel image, with the logo if your plan includes it. For print, open the portal, click *QR code* on the card, choose *Print quality (2000×2000)* in the *Download size* field and click *Download QR code (PNG)*. The differences between these two codes are explained in QR code: download, logo and printing.

#### How do you check the card on a phone?

1. Scan the QR code with the phone camera and open the suggested link.
2. Check the name, position, photo and buttons.
3. Tap *Save contact* and confirm adding it to the address book. If contact exchange is turned on (5 Sites and higher), the exchange window opens first; for a test, tap *Skip*.

4. In the address book, check the name, phone numbers, email and photo. The photo is included in the contact only if the original file is a JPG or PNG of up to 100 KB.
5. Repeat the check on a second phone, ideally one iPhone and one Android phone, before you send the QR code to print.

#### How do you add employees?

This step is optional. Once the first card works, you can create cards for your colleagues yourself or invite people to edit them on the portal:

- *Employees* (Unlimited and higher): you enter a name, email and phone number, and the software creates an account and a ready-made card and sends a one-time link for the first sign-in. See Employees.
- *Team* (Agency plan): you invite a team member or a Card Manager. See Team and the Card Manager role.

> **For employees and team members:** this chapter is meant for the administrator. If you received a link for the first sign-in or an invitation to the team, read Login, password and first sign-in.

> REAL-WORLD EXAMPLE
>
> A dental practice with three dentists buys the Single Site plan. The administrator installs the software, activates the key in the wizard, enters “Bright Smile Dental” as the portal name and uploads the logo. They create the lead dentist's card, download the QR code on the portal in the *Print quality (2000×2000)* size and, before sending it to the print shop, scan it with two phones and save the contact. Only when the address book shows the correct name, number and photo do they send the artwork for the new business cards, and then they create the other dentists' cards in the same order.

## 3. Plans, license and updates

**Where:** QR vCard Pro → Settings → License; shortcut on Home: *License and updates* | **Who:** Administrator | **Plan:** all plans

> Not sure what each plan gives you and what happens when the license expires? The plan determines how many cards you can create and which features are unlocked, and the cards that already exist keep working even without a license.

From the smallest, the plans are: Personal (free), Single Site, 5 Sites, Unlimited and Agency. Each higher plan includes everything in the lower ones. The plan is determined by the license server from the key you activate; without an active license, the software runs in demo mode. Upgrade messages list the plans with prices: Single Site ($49), 5 Sites ($99), Unlimited ($199) and Agency ($399). Check the current offer through the *View pricing* → or *Buy a license* → link on the License tab.

#### Which feature requires which plan?

| Feature | Minimum plan |
|---|---|
| **A card with all fields, the Minimal template, colors and quick presets, the QR code in all sizes, *Save contact*, *Share details*, the phone icon, multilingual content, basic analytics** | all plans |
| **Up to two cards on the site** | Personal |
| **Unlimited number of cards** | Single Site |
| **Logo in the center of the QR code (shared logo from Branding)** | Single Site |
| **Business, Creative, Futura, Showcase, Editorial and Free layout templates** | Single Site |
| **A separate QR code logo for each card** | 5 Sites |
| **Contact exchange on the card (Lead Capture), the Contacts screen and contact export** | 5 Sites |
| **Follow-up email per card** | 5 Sites |
| **Paper business card scanner** | 5 Sites (20 scans per user per month; Unlimited and Agency without a limit) |
| **Email signature** | 5 Sites |
| **Virtual background and vertical card** | 5 Sites |
| **Advanced analytics and CSV export of scans** | 5 Sites |
| **REST API and API keys** | 5 Sites |
| **Webhooks** | Unlimited |
| **Employees: adding, one-time sign-in links, activity overview** | Unlimited |
| **Team analytics and Team contacts** | Unlimited |
| **Events** | Unlimited |
| **Custom forms for collecting contacts** | Unlimited |
| **Team: inviting team members and the Card Manager role** | Agency |
| **Team email signatures** | Agency |
| **CSV import of employees** | Agency |
| **Bulk Import of cards from CSV** | Agency |
| **White-label and removal of the vendor credit from the card footer** | Agency |
| **Marketing module, campaigns, retargeting pixels, reviews, automatic follow-up, /l/ pages, SEO** | all plans |
| **Google Wallet, NFC cards, AI assistant, ROI dashboard, Odoo ERP** | all plans |

| Feature | Minimum plan |
|---|---|
| **Automatic updates** | active license |

“All plans” means that the feature has no plan check and also works in demo mode, for cards that already exist. Some of these features need their own setup, for example an OpenAI key for the AI assistant or a Google account for Google Wallet.

**How do locked features behave?**

- In wp-admin, no menu item disappears because of the plan. A locked page opens with a message saying from which plan the feature is available and a link to the plans, and on *Home* such tiles show a padlock 🔒.
- On the portal, only *Team* and *Email signatures* are hidden from the menu because of the plan; the other locked sections open with an upgrade message.
- In the template picker, locked templates are inactive, and above them is the notice “🔒 More templates are available from the Single tier. Your current tier uses Minimal.” with the *Upgrade tier* → link.
- When you move to a lower plan, the data stays in the database (cards, contacts, settings), but higher-plan features stop working until you activate the matching plan again.

**What is demo mode?**

Demo mode is the state without an active license: before the first activation, after deactivation, when the license expires or when the license server declares it invalid. The License tab header then shows *DEMO MODE*.

- Existing published cards and their QR codes keep working and can be edited.
- At most three cards can be published, in wp-admin or in the card editor on the portal. Guided card creation on the portal (Quick Start) and the API do not create cards in demo mode.
- Features with a plan check are locked, and the features marked “all plans” in the table above work.
- There are no automatic updates.
- The footer of every card shows “★ Made with Planeta QR vCard Pro free · Try it →”, just as on the Personal plan.

**How many cards does a plan allow?**

In demo mode, at most three cards can be published (guided card creation on the portal and the API do not create cards in that state). Personal allows at most two cards on the entire site, no matter who creates them, and Single Site and higher plans have no limit. The limit applies the same way in wp-admin, on the portal and in guided card creation on the portal. When it is reached, the new card stays saved as a draft and is not published, and the software reports that the plan limit has been reached. Cards that already exist stay published even after a move to a lower plan.

On top of the plan limit, the Administrator and the Card Manager can set a maximum number of cards per person for employees and team members: see Employees.

### How do you activate the license?

1. Open QR vCard Pro → Settings → License.

2. In the *License key* field, enter the key in the format `QRVP-XXXX-XXXX-XXXX-XXXX` (24 characters, with hyphens).
3. Click *Activate license*. The tab has no save button, and pressing Enter in the field does not activate the key.
4. If the key format is wrong, “License key format is invalid.” appears. If the license server does not accept the key, *Status* changes to “Invalid”, together with the server's message.
5. After a successful activation the page reloads, the label in the header reads *ACTIVE*, and the *Status* and *Tier* rows show the state and the plan.

**What does the License tab show?**

| Field | What it means |
|---|---|
| ***Status*** | “Not activated”, “Active”, “Expired”, “Invalid” or “Grace period (server unreachable)” |
| ***Tier*** | “Single Site”, “5 Sites”, “Unlimited Sites” or “Agency (white-label)”; for the free plan it shows “personal” |
| ***Bound to domain*** | the site domain recorded at the last successful activation or check |
| ***Valid until*** | the license expiry date; an empty field means the license does not expire |
| ***Last checked*** | how much time has passed since the last check with the license server |
| **message box** | the last message from the license server |

In demo mode, the tab also shows the “What you get with activation” block with the *Buy a license* → link. At the top of every page of the software, the Administrator also sees the “License status” notice, described in License status, conflicts and diagnostics.

**Options**

**License key** Default: empty

The license key you received from the vendor. The software checks the key format before sending it, and while the license is active the field is locked for editing. To enter a different key, deactivate the current one first.

**Example:** an agency buys the Agency plan for a client's site, enters the key it received and clicks *Activate license*; from that moment, Team, Bulk Import and White-label work on the site.

**Re-check** visible while the license is active

Asks the license server for the license state right away, instead of waiting for the automatic daily check, and overwrites the status, plan and expiry date with the values from the server.

**Example:** the vendor extends your license or upgrades your plan on the same key; you click *Re-check*, and the *Valid until* and *Tier* rows show the new state immediately.

**Deactivate license** visible while the license is active

After the confirmation “Are you sure you want to deactivate the license? The plug-in will switch to demo mode.”, it tells the license server that you no longer use the key and removes the key from the site. The key is removed even when the server is unreachable, with the message “License removed locally (server unreachable).” The site switches to demo mode immediately; cards and data remain.

**Example:** before moving the site from a staging domain to the live domain, you deactivate the license on the staging site, and after the move you activate the same key on the live one.

**Check for updates** Automatic updates panel, Manual check row

Clears the stored response and immediately asks the license server whether a new version exists; otherwise the check runs on its own every 12 hours. Above the button is the *Current version* row, and the result of the check appears as a message (table below).

**Example:** the vendor tells you that a new version with a fix you need has been released; you click *Check for updates* and use the link in the message to open the Plugins screen, where you install it.

**How is the license checked and what is the grace period?**

Once a day, the software checks the license with the license server on its own and records the status, plan and expiry date that the server returns. When the server reports that the license has expired or is invalid, the site switches to demo mode. When the server is unreachable, the license stays active for another 7 days from the first failed check, with the status “Grace period (server unreachable)”, and everything works as before. If the server still does not respond after 7 days, the site switches to demo mode, and as soon as the server responds again, the daily check restores the license by itself.

**What happens when you change the domain?**

With every check, the software sends the license server the key, the version and the site domain. The number of domains is set by the license server according to the license agreement (EULA): one domain for Single Site, up to five domains for 5 Sites, and no limit for Unlimited and Agency. After a move to a new domain, the license reports the new domain at the next check; if the server does not accept it, the site switches to demo mode. That is why you should deactivate the license on the old site before the move and activate it on the new one afterward. On a WordPress multisite network, each site has its own license and its own plan.

**How do updates work?**

At most once every 12 hours, the software asks the license server whether a new version exists, and only while the license is active. The new version appears on the standard WordPress Plugins screen, where you install it like any other plugin, manually or through WordPress automatic updates. The License tab only checks and points you to the Plugins screen.

Before installation, the software downloads the package and checks that its size is correct, that the file fingerprint (SHA-256) matches and that the package is digitally signed with the vendor's key, which is built into the software itself. It also checks whether your server meets the new version's PHP and WordPress requirements. If anything does not match, the update is stopped and the installed version keeps working. Put simply: even if someone broke

into the license server, they could not slip you a tampered package, because the signing keys are not on that server.

| Message after a manual check | What it means and what to do |
|---|---|
| **"↑ New version available:" with the version number** | the version is signed and ready; the "Open the Plugins page to install the update →" link leads to the Plugins screen |
| **"✓ The plug-in is up to date."** | you have the latest version |
| **"⚠ Updates are available only with an active license for this site. Activate the license above, then check again."** | the license is not active, or the server does not accept it for this site; activate it, then check again |
| **"⚠ Version ... is available on the license server, but its package is not signed with a key this plug-in accepts, so it is not offered for installation. Please contact support."** | do not install anything manually; contact the vendor |
| **"⚠ The new version details from the license server are incomplete. The update was not installed."** | try again later |
| **"⚠ Check failed: the license server is not reachable. Try again in a few minutes."** | the server is not responding at the moment; try again in a few minutes |

> **Watch out:** if you update the plugin by uploading a ZIP file manually through WordPress, the signature check is not performed. Download the ZIP only from the vendor and, whenever you can, update through the Plugins screen.

**What do the plan banners and notices mean?**

Above the *All cards* list in wp-admin there is a banner that depends on the plan. In demo mode, it announces that the software is running in demo mode and offers the *Start free* → button (free Personal plan) and the *I have a license key* button (leads to the License tab). On the Personal plan, it shows how many of the allowed cards have been used. On the Single Site, 5 Sites and Unlimited plans, it suggests the next plan and lists the features that plan actually adds. On the Agency plan there is no banner. The banners cannot be closed.

On the portal, above the card list, the Administrator and the Card Manager see the line "Valid license for the ... package." with the plan name and, if the plan is not Agency, a link to the offer of higher plans. In demo mode, the line names the Demo package, which means the license is not active.

The vendor can mark your license as verified. You can then mark cards with the blue Verified badge in the *All cards* list: see Card list, statuses, deletion and limits.

> **Watch out:** a public card keeps its template even after a move to a lower plan. If you then select Minimal in the editor, you cannot select the previous template again until you activate Single Site or a higher plan.

REAL-WORLD EXAMPLE

A law office with four attorneys starts on the free Personal plan and creates two cards. When the third attorney asks for a card, the software reports that the plan limit has been reached. The office buys Single Site; the administrator deactivates the free key, activates the new one and creates cards for all the attorneys. Because the office logo is already set in Branding, it appears in the center of every QR code on its own, without a single extra setting.

## 4. Roles and permissions

**Where:** QR vCard Pro → Employees and QR vCard Pro → Team; on the portal: *Employees* and *Team*

**Who:** everyone; roles are assigned by the Administrator and the Card Manager, and the Card Manager role only by the Administrator

**Plan:** all plans; Employees from Unlimited; Team and Card Manager Agency only

> Not sure who in your company may see and change what? There are four roles: the Administrator sets up the software, the Card Manager runs all cards and people on the portal, and Employees and Team members edit only their own cards.

The role determines where a person works (wp-admin or only the portal) and whose cards they see. The plan determines which sections exist at all: the Employees screen, for example, is available only from the Unlimited plan, whatever the role.

**Which roles are there?**

- **Administrator**: the WordPress administrator of the site. The only role that works in the QR vCard Pro menu in wp-admin, activates the license and changes settings and integrations. On the portal, the Administrator sees all cards and all sections.
- **Card Manager**: this role is assigned only by the Administrator, through Team (Agency plan), either with an invitation that carries the Card Manager role or with the *Make Card Manager* button next to an existing team member. Works only on the portal: changes all company cards and manages employees and the team, but has no access to the software settings and no rights over the site.
- **Employee**: an account that the Administrator or the Card Manager creates on the Employees page (Unlimited and higher). Receives a ready-made card and a one-time link for the first sign-in. Works only on the portal and changes only the cards they own.
- **Team member**: a person invited through Team (Agency plan). Has the same rights as an employee, and creates the card themselves after the first sign-in.

**Who may do what?**

| Capability | Administrator | Card Manager | Employee | Team member |
|---|---|---|---|---|
| **Access** | | | | |
| **Working in wp-admin** | yes | no, sent back to the portal | no, sent back to the portal | no, sent back to the portal |
| **WordPress toolbar at the top of the site** | sees it | does not see it | does not see it | does not see it |
| **Where the standard WordPress login leads** | to the WordPress administration | to the portal | to the portal | to the portal |
| **First portal screen** | *Home* | *Home* | *My card* | *My card* |
| **Largest image upload** | no limit set by the software | 200 KB | 200 KB | 200 KB |
| **Files visible when choosing an image** | all | files of all portal users, images from all cards and the company logo | their own files, images from their own cards and the company logo | same as Employee |
| **Cards** | | | | |
| **Cards on the portal** | all published (up to the 200 newest) | all published (up to the 200 newest) | their own only | their own only |
| **New card** | yes | yes | yes, up to the Maximum cards per person limit | yes, up to the same limit |
| **Editing, builder, statistics, QR code, email signature and virtual background of a card** | all cards | all cards | their own | their own |
| ***Delete* on the portal (moves the card to the Trash)** | all cards | all cards | their own | their own |
| **Restoring from the Trash, permanent deletion, card status and the Verified badge** | yes, in wp-admin | no | no | no |
| **Contacts and analytics** | | | | |
| ***Contacts* on the portal with no card selected, and CSV export** | from all cards | from all cards | from their own cards | from their own cards |
| **Contacts from another person's card** | yes | yes | no | no |
| **Deleting a contact on the portal** | from all cards | from all cards | from their own cards | from their own cards |

| Capability | Administrator | Card Manager | Employee | Team member |
|---|---|---|---|---|
| **Paper business card scanner (5 Sites)** | yes | yes | yes | yes |
| ***Card analytics* (ranking of all cards)** | yes | yes | no | no |
| ***Team analytics* and *Team contacts* (Unlimited)** | all employees | all employees | no | no |
| ***ROI dashboard*** | overview and *Assumptions* | overview only | no | no |
| ***Events* (Unlimited)** | creates them in wp-admin, views them on the portal | views them on the portal | no | no |
| **People** | | | | |
| **Employees: list, adding, CSV import, new link, link revocation, deactivation** | yes | yes | no | no |
| **Permanently deleting an employee** | yes | yes, any employee | no | no |
| **Team list** | all portal users and administrators | all portal users, without administrators | no | no |
| **Inviting to the Team (Agency)** | as a team member or as a Card Manager | only as a team member | no | no |
| **Resending an invitation and deactivating a member** | everyone except themselves and administrators | only team members without special rights | no | no |
| **Assigning and removing the Card Manager role** | yes | no | no | no |
| **The Maximum cards per person setting** | yes | yes | no; the limit applies to them | no; the limit applies to them |
| **Tools and settings** | | | | |
| **Team *Email signatures* (Agency)** | yes | no | no | no |
| ***NFC cards*** | all cards; turns the section on and off | all cards | their own | their own |
| ***Google Wallet*** | sets it up and uses it for their own cards | their own cards, when it is turned on | their own cards, when it is turned on | their own cards, when it is turned on |
| ***AI assistant*** | tools; turns the module on and off | tools, when it is turned on | tools, when it is turned on | tools, when it is turned on |

| Capability | Administrator | Card Manager | Employee | Team member |
|---|---|---|---|---|
| ***Marketing*** | all tabs | *View*, *Campaigns*, *Help* | same as Card Manager | same as Card Manager |
| ***Webhooks* (Unlimited) and *API keys* (5 Sites) on the portal** | sees all; their webhook receives events from all cards | sees their own; their webhook receives events from all cards | no | no |
| **Software settings, License, White-label, Odoo** | yes | no | no | no |
| ***Complete guide* and password change** | yes | yes | yes | yes |

**How do an Employee and a Team member differ?**

In WordPress they are the same type of account, with the same rights on the portal. They differ in how they are created and in what the software does for them.

| | Employee | Team member |
|---|---|---|
| **Where they are added** | Employees page (Unlimited and higher) | Team page (Agency) |
| **Card** | the software immediately creates one published card with the name, position, phone number and email address | not created; the member creates it themselves |
| **First sign-in** | one-time link (valid for 30 days), then setting a password on the portal and the public card with instructions for the phone icon | WordPress link for setting a password, then sign-in to the portal, the welcome screen and Quick Start |
| **Email they receive** | “Your digital business card from … is ready”, with the company name | “You have been invited to the team:” with the site name |
| **Where they are listed** | the Employees list and the Team list, where they appear as “Team member” | the Team list only |
| **Status in the list** | link status: “active”, “activated” or “none” | “Pending confirmation” or “Active” |
| **Team analytics and Team contacts** | included | not included |
| **Deletion in the software** | permanent deletion with the 🗑 button | only *Deactivate*; the account is deleted in WordPress Users |
| **Additional data** | department, position and phone number | first and last name only |
| **Changing the type** | cannot become a team member through the interface | becomes an employee when you add the same email address on the Employees page |

**What about other WordPress roles?**

Editors, Authors, Contributors, Subscribers and store customers have no access to the portal or to the QR vCard Pro menu in wp-admin. If such a user submits the portal sign-in form with correct credentials, the software signs them

out of WordPress and shows “Your account does not have permission to access this portal.” An account that already has editor or administrator rights cannot become an employee; the Employees page then reports “A user with this email address already exists and cannot be added as an employee.” An employee or team member you deactivate who has no other role becomes a Subscriber and can no longer access the portal.

**Watch out:** do not invite through Team an existing account that is used for something else, for example a site editor or a store customer. The software adds the team member role to such an account, and from that moment the account works only on the portal: wp-admin sends it back to the portal and it no longer sees the WordPress toolbar. Only administrators are exempt from this. Send the invitation for such a person to a different email address, so they get a separate account for the portal.

**Note:** a Card Manager cannot assign the Card Manager role to another person or remove it; only the Administrator can do that. Adding people is described in Employees and Team and the Card Manager role, and the first sign-in in Login, password and first sign-in.

REAL-WORLD EXAMPLE

An IT company with thirty employees is on the Agency plan. The director, as Administrator, gives the office manager the Card Manager role. On the portal she adds new employees, changes cards when someone changes position and reviews Team contacts after a trade fair, but she does not see the license or the site settings. The developers, as employees, change only their own cards and cannot accidentally change a colleague's phone number.

# 5. Creating and editing a card

**Where:** QR vCard Pro → All cards and QR vCard Pro → New QR Card; on the portal: *Cards* or *My card*, the *New vCard* and *Edit* buttons

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** all plans; the number of cards depends on the plan

> Need a new card or a change to an existing one? The Administrator creates it in wp-admin or on the portal, everyone else only on the portal; the card's data and short address are the same in both places.

A card is a record in your site's database with one owner. When it is saved for the first time, it gets a short address, for example `your-site.com/q/Rm4xT9`, which never changes afterward and cannot be changed by hand. It is shown publicly only while it is published. The owner is the card's WordPress author: on the portal, Employees and Team members see and change only the cards they own, while the Administrator and the Card Manager see and change all cards.

### How do you create a card in wp-admin?

1. Open QR vCard Pro → New QR Card (in older WordPress versions the item is called *Add New*). The screen is titled “New QR Card”.
2. In the title field at the top, enter the card's internal name.
3. Fill in the boxes in order: *1. Profile and details*, *2. Contact details*, 📷 *Add up to 4 photos to the card*, *3. Social media* and *4. Design and colors*.
4. Click *Publish*. Later changes are saved with the *Update* button.
5. Open the card (in the *All cards* list, the link in the *URL* column or the *Open landing page* action) and check how it looks.

### How do you create a card on the portal?

1. Open *Cards* (Administrator and Card Manager) or *My card* (Employee and Team member) and click *New vCard*.
2. Fill in the *1. Profile*, *2. Contact*, *3. Social media and links* and *4. Landing page colors* sections.
3. Click *Create card* in the right column. The card is published immediately, and you become its owner.
4. The portal reports “Card saved.” and takes you back to the list.

Anyone who has no cards in the list also gets guided card creation through *Quick Start (3 minutes)*: see QR portal: screens and who sees what.

### How do you change an existing card?

In wp-admin, open *All cards*, click the card name, make your changes and click *Update*. On the portal, click *Edit* on the card (the “Edit vCard” screen), make your changes and click *Save changes*; *Cancel* takes you back to the list without saving. Changes take effect immediately, including for QR codes that have already been printed. When someone on the portal opens a card they are not allowed to change, they see the message “You do not have permission to edit this card.”

### How do the editors in wp-admin and on the portal differ?

| | wp-admin | Portal |
|---|---|---|
| **Card name** | a separate field at the top of the screen | no field; on every save the name becomes the first and last name, and if those are empty, “Untitled” |
| **Sections** | *1. Profile and details*, *2. Contact details*, *📷 Add up to 4 photos to the card*, *3. Social media*, *4. Design and colors* | *1. Profile* (with the gallery and featured links), *2. Contact*, *3. Social media and links*, *4. Landing page colors* |
| **Names of two fields** | *Position / role*, *Bio / short description (shown on the landing page)* | *Position*, *Bio / short description* |
| **Live card preview** | none | none; a simplified preview exists only in the Free layout builder |
| **Builder for Free layout** | no button | *🎨 Open builder (arrange elements)* |
| **The *Region / state* field** | present | absent |
| **QR code** | the *QR Code* box (240 pixels, with the logo) and the *Branded QR* box | a 200-pixel QR code in the right column, without a logo, with the *Download and options* and *✉ Email signature* buttons |
| **Lead Capture per card** | none | the *5. Lead Capture (per card)* section, only for saved cards, from the 5 Sites plan |
| **Follow-up email per card** | always visible in *2. Contact details*; works from the 5 Sites plan | the *Follow-up email* section, visible from the 5 Sites plan |
| **The *Custom contact capture form* box** | present (Unlimited) | absent |
| **The *SEO and visibility* and *Statistics* boxes** | in the right column | absent; statistics is a separate screen |
| **Author, status and Verified badge** | WordPress boxes and the card list | none |
| **Color picker** | the WordPress picker with a button for restoring the default color | the browser's picker, with the hex value displayed |
| **Largest image upload** | no limit for the Administrator | 200 KB for Card Managers, Employees and Team members |

### Options

**Card name** Default: empty · wp-admin only

The internal name you see in the *All cards* list and in the contact export. The field shows the example “Card name (e.g. "Trade Show 2026 vCard")”. On the card itself, the name appears only if *First name* and *Last name* are empty, and it does not go into the saved contact.

**Example:** Mark has two cards, so the administrator names them “Mark: trade fair” and “Mark: standard”, to tell them apart in the list and in the contacts that come in through them.

**Card author (WordPress Author box)** Default: the person who creates the card · Administrator only, in wp-admin

Determines the card's owner. When you change the author to the account of an employee or team member, that person sees the card on the portal as their own and can change it. The card then also counts toward their Maximum cards per person limit.

**Example:** a sales rep leaves the company, and his card is printed in hundreds of catalogs. The administrator enters the successor's details on the card and selects the successor's account in the author box, so the same QR code in the catalogs now leads to the new person, who maintains the card from then on.

**Appearing in search** Default: Default (follows the global setting) · SEO and visibility box, wp-admin only

The values are “Default (follows the global setting: enabled)” or “(follows the global setting: disabled)”, “Yes, allow in search” and “No, hide from search”. Below the choice is the current state, for example “Currently: this card is NOT indexed (only reachable via its direct link/QR code).” By default, a card is hidden from search engines until you allow indexing globally or for that card. The global setting is described in SEO and search visibility.

**Example:** an attorney wants his card to appear when someone searches Google for his name, so he chooses “Yes, allow in search”, while the other employees' cards stay on “Default” and can be reached only through the link and the QR code.

**Set a different mode for this card and Mode for this card**

Default: off · Plan: 5 Sites · portal only, section 5. Lead Capture (per card)

When you turn on the switch, you choose how this card asks for the visitor's contact: “Off”, “Post-Save modal”, “Pre-Save banner”, “Gated (must exchange before downloading)” or “Banner + Modal (both)”. This choice takes precedence over the global setting, while the texts, fields and consent remain global. The section is shown only for a card that has already been saved, and employees see it on their own cards too, so they can turn off contact exchange themselves. The meaning of each mode is explained in Lead Capture: contact exchange on the card.

**Example:** a company uses Post-Save modal globally, and for the card it hands out at a trade fair it chooses Gated, so nobody at the booth takes the contact without leaving their own.

**What are the other boxes on the card screen?**

- *QR Code* and *Branded QR*: the card's QR code, its download and the logo in the code, described in QR code: download, logo and printing.

- *Statistics*: “total scans”, “unique” and “today”, with the 📊 *Open analytics* button. A scan is an opening of the card, excluding bots and contact downloads, and unique visitors are told apart by a protected record of their IP address. If scan logging is turned off in Privacy and GDPR, nothing is counted. See Analytics: what is measured and where to see it.
- *Email signature* (5 Sites): see Email signature.
- *Virtual background and vertical card* (5 Sites): see Virtual background and vertical card.
- *Custom contact capture form* (Unlimited, wp-admin only): see Custom forms.

**Watch out:** every save on the portal overwrites the card name with the first and last name. If you use the name to tell apart several cards of the same person, enter it again in wp-admin after any change on the portal.

**Watch out:** the “Password protected” visibility in the WordPress Publish box does not protect the card: the card is still shown to everyone, without a password. Switch a card that must not be public to draft.

**Note:** the per-card logo in the QR code, search appearance, the region in the address and a custom contact capture form are set only in wp-admin. The card screen has no live preview, so after every save, open the card in another browser tab and refresh it.

REAL-WORLD EXAMPLE

A medical equipment distributor has twelve sales reps in the field. The sales assistant, as Card Manager, updates every rep's card on the portal whenever a phone number or a sales territory changes. In wp-admin, the administrator turns on search appearance for the director's card and enters the region for customers abroad. When one rep leaves, the administrator does not delete his card, but enters the new rep's details and changes the card author, so the QR codes on brochures that are already in hospitals lead to the person who now covers those customers.

## 6. Profile and details

**Where:** card screen, *1. Profile and details* box; on the portal: *1. Profile* section

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** all plans

> What does a visitor see first when they open your card? Your photo, name, position and a few sentences about you: all of this is entered in the first part of the editor, and the same data goes into the contact the visitor saves.

The fields are the same in wp-admin and on the portal; only the names of two fields differ: *Position / role* is called *Position* on the portal, and *Bio / short description (shown on the landing page)* is called *Bio / short description*. The template choice is at the top of the same section and is described in Appearance: templates, free layout and colors. On the portal, the gallery and featured links are also in this section; they are described in Social networks and gallery and Contact details, address and featured links.

The *Position*, *Department*, *Company*, *Certifications / titles*, *Headline / tagline*, *Bio*, *Tags / skills* and *Featured note* fields have language tabs and can be filled in for 11 languages: see Multilingual cards. The first and last name have no translations.

### How do you add an image?

1. Click *Choose image* (photo), *Choose logo* or *Choose cover*.
2. In the media library window, choose an existing image or upload a new one from your computer or phone.
3. Confirm your choice; a preview of the image appears next to the field. *Change* replaces the image, and *Remove* takes it off the card, while the file stays in the library.
4. Save the card.

Card Managers, Employees and Team members can upload an image of at most 200 KB; a larger one is rejected with the message “Image is too large (...). Maximum allowed size is ...”, which suggests tinypng.com or squoosh.app for compressing it. In the library they see only the files they are allowed to use: their own images, images from their own cards and the company logo, and the Card Manager also sees the files of other portal users and images from all cards. The Administrator has no size limit.

**Options**

**Card type (optional)** Default: No label

A choice of “No label”, “💼 Work” or “👤 Personal”. A small WORK or PERSONAL label appears next to the name on the card, and hovering over it shows “Business card” or “Personal card”. This is useful when one person has several cards.

**Example:** a consultant has a business card for clients and a personal one for the charity where she volunteers; the label tells the visitor right away which card they have received.

**Cover image (hero banner, optional)** Default: no image

A wide image at the top of the card, cropped to an 8:3 ratio; the recommended size is 1600×600 pixels. The Futura template does not show it, and in Free layout it goes below the arranged elements, so it is not at the top.

**Example:** a restaurant puts a photo of its riverside terrace on the floor managers' cards, so a guest who scans a card recognizes the place right away.

**Profile photo** Default: no image (initials are shown)

The person's picture in the upper part of the card. Without it, the card shows the initials of the first and last name. The same image is used in the link preview when you send the card in a message, as the icon when a visitor adds the card to their phone's home screen, and in the saved contact, but only if the original file is a JPG or PNG of up to 100 KB.

**Example:** a dental practice prepares the dentists' portraits as JPG files of about 80 KB, so their faces also appear in the patients' address books, not only on the card.

**Company logo (optional)** Default: no logo

The logo above the photo on the card. If a visitor adds the card to the home screen and the card has no photo, the logo becomes the icon. The Futura template does not show it. This is not the logo in the QR code: that one is set in Branding and in the *Branded QR* box (QR code: download, logo and printing).

**Example:** an IT company puts the same logo on all employees' cards, so the cards look like part of one brand even though the photos and positions differ.

**First name** Default: empty

The card's heading and the first part of the name in the saved contact. It is also used for the initials when there is no photo, for the page title in the browser and for the name of the phone icon. It has no language tabs.

**Example:** enter your name the way you want it to appear in other people's address books, for example “Elizabeth” rather than a nickname, because people search for the contact by it.

**Last name** Default: empty

The second part of the name on the card and the last name in the saved contact, which the phone uses to sort the address book. It has no language tabs.

**Example:** a physician enters only “Peterson” and puts the title “MD, PhD” in *Certifications / titles*, so that the contact is sorted correctly by last name in the address book.

**Position / role** on the portal: Position · Default: empty

The first part of the “Position · Department · Company” line below the name. It also appears in the page title (“Name · Position”), in the link preview in messages and as the job title in the saved contact. The field shows the example “e.g. Sales Director”.

**Example:** “Sales Director, Nordic region” tells a customer right away that this is the right person for an order from Sweden or Norway.

**Department (optional)** Default: empty

Shown in the same line, between the position and the company, and in the saved contact as the department next to the company name.

**Example:** a large distributor enters “Service and Support”, so a customer who finds the contact in their phone knows to call this person about a breakdown, not for a quote.

**Company** Default: empty

The last part of the “Position · Department · Company” line. It is also used as the text description of the logo for screen readers, in the link preview in messages and as the company in the saved contact. The field shows the example “e.g. Your Company Ltd.”

**Example:** “Cornerstone Construction Ltd.”; after the contact is saved, the phone shows the company below the name, so the contact is easy to find even when someone has forgotten the name.

**Certifications / titles (optional)** Default: empty

A comma-separated list. Each item is shown as a separate badge below the name, and all of them together go into the note of the saved contact. The field shows the example “e.g., AWS Certified, PMP, Scrum Master”.

**Example:** a project manager enters “PMP, PRINCE2, ISO 27001 Lead Auditor” and gets three badges that show a client her qualifications at once.

**Headline / tagline (optional)** Default: empty

A single highlighted sentence below the badges, in the accent color. It also goes into the note of the saved contact. The help text suggests at most 120 characters; the software does not shorten longer text, but a short sentence reads better on a phone.

**Example:** a real estate agent enters “I help families buy their first home without the stress” and says what she does before the visitor reads anything else.

**Bio / short description (shown on the landing page)** on the portal: Bio / short description · Default: empty

A paragraph below the position line; line breaks are preserved. It goes into the note of the saved contact, and its beginning, together with the position and the company, is also used as the card description for search engines (up to 160 characters). The length is not limited.

**Example:** “For twenty years I have been designing commercial interiors in the city and the surrounding region. I handle every stage, from concept design to handover.” Two sentences are enough for a visitor to know why they would call you.

**Tags / skills (optional)** Default: empty

A comma-separated list; on the card it appears as a row of small labels below the description, and in the saved contact as categories. The field shows the example “e.g., PHP, WordPress, Solo Founder, B2B”.

**Example:** an attorney enters “Family law, Inheritance, Employment law”, so a client sees at a glance whether she handles his kind of case.

**Featured note (optional)** Default: empty

Framed text in the accent color, with an “i” icon, above the *Save contact* button. It is meant for offers, announcements and important notices. It does not go into the saved contact. The help text suggests at most 280 characters; the software does not shorten longer text.

**Example:** “📢 June 1 to 15: free checkup for new patients”; when the promotion is over, the practice deletes the text and the box disappears from the card, while the QR code stays the same.

**Watch out:** a photo larger than 100 KB, or in WebP or GIF format, is shown on the card but does not go into the saved contact. For a contact with a picture, prepare a JPG or PNG of up to 100 KB. The portal allows uploads of up to 200 KB, so images between 100 and 200 KB work on the card but leave the address book entry without a photo.

**Watch out:** if you leave *First name* and *Last name* empty, the card shows the card name, but the saved contact has no name. Always fill in at least one of these two fields.

**Note:** if the old image is still there after saving on the portal, the image you selected is not among the files your account is allowed to use. Upload it again from your computer or phone, then select it.

REAL-WORLD EXAMPLE

Attorney Anna Carter hands out her card instead of a paper business card at a talk for entrepreneurs. In *Certifications / titles* she enters “Attorney, Mediator”, in *Tags / skills* her practice areas, and in *Featured note* an offer of a free consultation for members of the association. A listener who scans the card sees her practice areas before calling, and the *Save contact* button puts her number, her office and her titles (in the contact's note) into the listener's address book.

## 7. Contact details, address and featured links

**Where:** card screen, *2. Contact details* box; on the portal: *2. Contact* section; on the portal, featured links are in the *1. Profile* section

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** all plans; follow-up email per card from 5 Sites

> How can a visitor call you, email you or open your website with one tap? Enter your phone numbers, email addresses, websites and address here: the first phone number and the first email address become the card's main buttons.

Phone numbers, email addresses and websites are lists. Each row has a type (for example Mobile or Work) and a value, and you add a new row with the button below the list. The number of rows is not limited. Empty rows are not saved, and the last row is not deleted, only emptied. The order matters: the *Call* button uses the first phone number, and the *Email* button the first email address.

**What of this is visible on the card?**

- Action buttons: *Call* (first phone number), *Email* (first email address) and *Map*, when a street or city is entered.
- The *Contact* section: all phone numbers, email addresses and websites with their type, and the *Address* row when there is a street or city. The section is shown only if there is at least one phone number, email address or website.
- Saved contact: all phone numbers, email addresses, websites and the address, with a type the phone understands (mobile, work, home, fax).
- Analytics: taps on the phone number, email, website and the *Map* button are recorded (Analytics: what is measured and where to see it).

**Options: phones, email and websites**

**Phones (+ Add phone)** Default: one empty row

The types are “Mobile”, “Work”, “Home”, “Fax” and “Other”; the field shows the example “+1 555 123 4567”. On the card, every number is a call link, and in the saved contact it gets the matching type. Enter numbers in international format, with the country code (for example +1 or +44), so that they also work from phones abroad.

**Example:** a field sales rep puts his mobile number first and the office landline second, as “Work”, so the *Call* button always calls the mobile, which he answers even when he is out of the office.

**Email addresses (+ Add email)** Default: one empty row

The types are “Business”, “Personal” and “Other”; the field shows the example “name@company.com”. On the card, every address is a link for a new message. The first address is also the reply address when a visitor forwards your card to someone by email. The software does not check whether the address is spelled correctly, so check it yourself.

**Example:** a purchasing manager puts her business address first and the department's shared address “purchasing@company.com” as “Other”, so inquiries arrive even when she is on vacation.

**Websites (+ Add website)** Default: one empty row

The types are “Work”, “Personal”, “Portfolio”, “Blog” and “Other”; the field shows “https://...”. An address without https:// gets it added automatically. On the card, the website is shown without http:// or https:// and opens in a new browser tab.

**Example:** an architect adds the firm's website as “Work” and the page with completed projects as “Portfolio”, so a client reaches both the firm and its work from the same card.

**Options: address**

The *Map* button appears when a street or city is entered; the country alone is not enough. It opens a Google Maps search with the street, city and country, without the postal code and region. The card has no embedded map.

**Street and number** Default: empty

The first part of the *Address* row in the *Contact* section, part of the map search and the street in the saved contact.

**Example:** “12 Liberty Avenue, Unit 3”; the unit number helps a first-time visitor find the entrance.

**City** Default: empty

Part of the *Address* row, part of the map search and the city in the saved contact. In the Futura template, the city is also shown as *Location* next to the QR code.

**Example:** a sales rep who covers an entire region enters only “Lyon”, without a street, so the customer knows where he is based, and the *Map* button shows the city.

**Postal code** Default: empty

Shown in the *Address* row and included in the saved contact, but not used in the map search.

**Example:** a courier company enters “60601”, so the address in a customer's address book can be copied straight onto a shipment.

**Region / state** Default: empty · wp-admin only

Goes only into the saved contact; it is not shown on the card and is not available on the portal.

**Example:** an exporter with a branch office in the US enters “Illinois”, so the address in American customers' address books is complete.

**Country** Default: Srbija, the Serbian word for Serbia (the field is prefilled)

The last part of the *Address* row, part of the map search and the country in the saved contact.

**Example:** a company based near a national border, with customers on the other side, keeps its own country in the field, so customers see in their address books that the address is in another country.

**Watch out:** the *Country* field is prefilled with “Srbija” (Serbia) and is saved even when you enter nothing else. The saved contact then gets an address that contains only the country. If you do not want an address in the contact, delete the country as well. If the card has no phone number, email address or website, the *Contact* section is not shown, so the *Address* row is not visible either; the address is then available only through the *Map* button.

**Options: follow-up email per card**

In wp-admin these fields are at the bottom of the *2. Contact details* box and are visible on all plans, but they work only from the 5 Sites plan. On the portal they form a separate *Follow-up email* section, shown only from the 5 Sites plan. The general follow-up for all cards is described in Automatic follow-up.

**Automatically send a "thank you" email to the lead after a contact exchange**

on the portal: Enable follow-up email · Default: off · Plan: 5 Sites

When a person leaves their contact through the form on this card and enters an email address, they automatically receive a thank-you message. If the message is turned on for the card, only this message is sent, not the general follow-up from the Marketing module as well. It is not sent to contacts you entered yourself with the paper business card scanner, or to those that arrive through the API. The same address receives at most one such message every 24 hours, and replies to the message go to the email address of the card owner's account.

**Example:** an exhibitor at a trade fair turns on the message on the booth card; everyone who leaves a contact gets a thank-you while the conversation is still fresh, with nothing to send by hand after the fair.

**Email subject** Default: “Thanks for sharing your contact: {vlasnik}”

The subject of the message. An empty field means the default subject. You can use the placeholders `{ime}` (first name of the person who left the contact), `{vlasnik}` (first and last name from the card), `{kartica}` (card name) and `{firma}` (company from the card).

**Example:** “{ime}, thank you for stopping by our booth” arrives as “Michael, thank you for stopping by our booth” when the visitor entered the name Michael in the form.

**Email body** Default: the default thank-you text

The body of the message, with the same placeholders as the subject. An empty field means the default text, which begins with “Dear {ime}, thank you for sharing your contact with {vlasnik}...”. The message has no unsubscribe link, so write it as a personal thank-you note, not as an advertisement.

**Example:** “Dear {ime}, following up on our conversation, here is the link to the catalog we talked about. Let me know once you have had a chance to look at it. {vlasnik}, {firma}”

### How do you add a featured link?

Featured links are up to 7 visual cards with a thumbnail, title and description, in the *Links* section of the card. They are for whatever you want the visitor to open right away: a catalog, booking, a portfolio, a price list. In wp-admin they are in the *2. Contact details* box, under the heading “Featured links (with preview cards)”, and on the portal in the *1. Profile* section, under the heading “Featured links (preview cards)”.

1. Click *+ Add featured link* (wp-admin, with a counter, for example “(2/7)”) or *+ Add link* (portal).
2. Enter the page address.
3. Click *Load preview*: the software reads the title, description and image from that page.
4. Correct the title and description if needed, or set your own thumbnail with the 📷 *Upload* button.
5. Save the card.

**URL (field with the example https://example.com)** required for every link

The page that opens when someone taps the featured link. On the card, only the domain is shown below the title, without www. A row without an address is not saved.

**Example:** a furniture manufacturer adds the address of the PDF catalog on its website, so a buyer at a trade fair opens the catalog from the card without carrying any paper.

**Title** Default: empty or the title of the loaded page

The bold title of the featured link. It has language tabs and a button for automatic translation.

**Example:** instead of the long page title, enter something short such as “Book an appointment online”.

**Short description** Default: empty or the description of the loaded page · at most 200 characters per language

The text below the title. On the portal, a counter shows the number of characters (up to 200), while in wp-admin longer text is shortened without warning when you save. It has language tabs.

**Example:** “Open slots for the next 14 days, confirmation by text message.”

**Load preview and ↻** inactive until you enter an address

*Load preview* reads the title, description and image of the entered page on the server and stores the result for 7 days; ↻ reads the page again, bypassing the stored result. It works only for public http and https addresses, waits at most 5 seconds for the page, and one user can send one request every 3 seconds.

**Example:** after you change the featured image on your blog, you click ↻, and the featured link gets the new thumbnail.

**📷 Upload** JPG, PNG, GIF or WebP, at most 20 KB

Sets your own thumbnail instead of the image from the loaded page. On the card, the thumbnail is shown at 88×88 pixels (64×64 on a phone); without an image, a generic image icon is shown.

**Example:** the booking page has no preview image, so the practice uploads a small logo as the thumbnail, so that the link does not look empty.

**× (delete link)**

Removes the featured link from the card. In wp-admin you are asked to confirm with “Delete this link?”, while on the portal the link is removed right away. The deletion becomes final only when you save the card.

**Example:** when a spring promotion ends, you remove the link to the promotion page and add a link to the new price list.

**Watch out:** the preview image is not copied to your site; it is loaded from the other site, so if it is deleted there, the thumbnail disappears from the card. For a permanent thumbnail, use 📷 *Upload*. *Load preview* writes the title and description only into the language tab that opens first (the site language, otherwise Srpski), and only if that tab is empty, but it always replaces the image, and removes it if the page has no preview image. So once you have set your own thumbnail, do not click *Load preview* again.

**Note:** in wp-admin, a card cannot be saved if a row has an image but no address; the software warns you about this. On the portal, such a row is silently discarded. Featured links are never hidden when a visitor forwards the card with a selection of fields.

REAL-WORLD EXAMPLE

An air-conditioning service company has two field technicians. On their cards, the first phone number is the on-call mobile number, the second is the service center's landline, and the workshop address includes the city, so customers use the *Map* button to find where to bring a unit. As featured links, the company adds “Book a service” and “Price list”, and on the 5 Sites plan it turns on the follow-up, so everyone who leaves a contact receives a thank-you with a link to the maintenance guide.

## 8. Social networks and gallery

**Where:** card screen, *3. Social media* and 📷 *Add up to 4 photos to the card* boxes; on the portal: the *3. Social media and links* section and, in the *1. Profile* section, the *Gallery: up to 4 photos* part

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** all plans

> Want visitors to go from your card to your LinkedIn, message you on WhatsApp or see photos of your work? Enter your profile addresses and add up to four photos: the card shows only what you fill in.

There are 20 social network fields, divided into the *Social networks*, *Messaging*, *Business* and *Payment* groups. All of them are optional. Each network you fill in appears on the card as a row with an icon in the brand's color, a name and an arrow, in the *Social media and links* section, in the same order as in the editor. The networks also go into the saved contact, as profiles that the phone's address book can display.

Analytics records every tap on a social network, so you can see which profile visitors open most often (Analytics: what is measured and where to see it).

### How do you enter a profile?

1. Open your profile in a browser, on a computer or a phone.
2. Copy the full address from the address bar, with https:// at the beginning.
3. Paste it into the field for that network; the gray example in the field shows the expected format.
4. Save the card and check on a phone that the link opens the right profile.

Below the fields is a reminder: “All fields are optional. WhatsApp uses a phone number (with country code), others use profile/page URLs.”

**Options: social networks**

**LinkedIn** Social networks group · Default: empty

The address of a personal profile or a company page, in the form https://www.linkedin.com/in/...

**Example:** an HR consultant enters her personal profile, so a business contact from a trade fair adds her to their network right away.

**Facebook** Social networks group · Default: empty

The address of a profile or page, in the form https://www.facebook.com/...

**Example:** a restaurant enters the page where it posts the daily menu every morning.

**Instagram** Social networks group · Default: empty

The profile address, in the form https://www.instagram.com/...

**Example:** a wedding photographer takes couples straight to the profile with the latest work.

**X / Twitter** Social networks group · Default: empty

The profile address, in the form https://x.com/...

**Example:** a PR manager who publishes the company's announcements on X enters the company's official profile.

**Threads** Social networks group · Default: empty

The profile address, in the form https://www.threads.net/@...

**Example:** a marketing agency that regularly posts tips on Threads enters the agency's profile.

**YouTube** Social networks group · Default: empty

The channel address, in the form https://www.youtube.com/@...

**Example:** a water heater technician enters his channel with maintenance tutorials, so customers can find it even after the service visit.

**TikTok** Social networks group · Default: empty

The profile address, in the form https://www.tiktok.com/@...

**Example:** a hair salon enters its profile with short hairstyle videos, which younger clients like to watch most.

**Snapchat** Social networks group · Default: empty

The address for adding the profile, in the form https://www.snapchat.com/add/...

**Example:** a student party organizer enters the profile where he announces the next event.

**Twitch** Social networks group · Default: empty

The channel address, in the form https://www.twitch.tv/...

**Example:** a gaming gear store enters the channel where it tests new peripherals live.

**Yelp** Social networks group · Default: empty

The address of the business page, in the form https://www.yelp.com/biz/...

**Example:** a restaurant with many foreign guests enters its Yelp page, where tourists read ratings before booking.

**WhatsApp (phone)** Messaging group · Default: empty

A phone number with the country code, for example +1 555 123 4567. The software uses only the digits of the number and creates a link for a WhatsApp chat. The card then also gets the *WhatsApp* action button next to *Call*, so WhatsApp appears in two places: as a button and as a row in the list of networks, under the name “WhatsApp (phone)”.

**Example:** a real estate agent receives inquiries and apartment photos through WhatsApp, so she enters “+1 555 123 4567” and buyers message her with one tap.

**Telegram** Messaging group · Default: empty

The address of a profile or channel, in the form https://t.me/...

**Example:** the tech support team of a software company enters the Telegram account it uses to answer users.

**Signal** Messaging group · Default: empty

A chat link, in the form https://signal.me/#p/+1...

**Example:** an attorney who exchanges confidential documents in encrypted form enters his Signal link.

**Discord** Messaging group · Default: empty

The profile address, in the form https://discord.com/users/...

**Example:** a developer who runs a user community for his tool enters his Discord profile, where he answers questions.

**Skype** Messaging group · Default: empty

The field accepts only addresses that start with https://. The format suggested by the gray example, “skype:username?chat”, is deleted when you save. Microsoft shut down Skype in May 2025, so the field only makes sense for old cards.

**Example:** an older card of a translator still has a Skype link that no longer works; delete it, and add the link for the video meetings you use now under *Websites* as “Other”.

**GitHub** Business group · Default: empty

The profile address, in the form https://github.com/…

**Example:** a developer at a job fair enters his GitHub profile, so an employer can see his code right away.

**Calendly** Business group · Default: empty

A link for booking a meeting, in the form https://calendly.com/…

**Example:** a business consultant enters the link for a free 20-minute intro call, so a client books it right after scanning the card.

**PayPal** Payment group · Default: empty

A payment link, in the form https://paypal.me/…

**Example:** a language teacher who gives lessons online enters a PayPal link so students abroad can pay for their lessons.

**Venmo** Payment group · Default: empty

A payment link, in the form https://venmo.com/u/… Venmo is used in the US.

**Example:** a photographer who works in the US during the summer enters a Venmo link, because that is how clients there usually pay.

**Cash App** Payment group · Default: empty

A payment link, in the form https://cash.app/$…

**Example:** a freelancer with clients in the US enters a Cash App link next to PayPal, so each client can pick the method they already use.

**Watch out:** if you enter only a username or “@username” instead of the full address, the software adds https:// in front of it and the link will not work. Always enter the full profile address. For WhatsApp, a number in local format, for example 07700 900123, does not work: the number must start with the country code (for example +44).

## How do you add a photo to the gallery?

The gallery shows up to four photos in the *Gallery* section: a single photo spans the full width, and two to four photos are arranged in two columns. The slots have a 16:9 format, so an image with a different shape is cropped to fill its slot; tapping an image opens an enlarged view, which closes with a tap or the ESC key.

1. In the 📷 *Add up to 4 photos to the card* box (wp-admin) or in the *Gallery: up to 4 photos* part (portal), click *+ Add photo*.
2. Choose an image from your computer or phone; the media library does not open here.
3. The image is uploaded and appears in the grid immediately. Repeat for the other images.
4. Save the card.

**Options: gallery**

**+ Add photo** Default: no photos · at most 4, up to 200 KB per image

Uploads one image in JPG, PNG, GIF or WebP format, of at most 200 KB, for all roles, including the Administrator. After the fourth image, the button is disabled with the message “You have reached the maximum of 4 photos”.

**Example:** a carpentry workshop adds photos of four finished kitchens, shot in landscape orientation, so a buyer at a trade fair sees the quality of the work right away.

**× (remove photo)**

Takes the image off the card. The file stays in the media library.

**Example:** when you sell a showroom model, you remove its photo and add the new model in the same place.

**Watch out:** the gallery is never hidden when a visitor forwards your card with a selection of fields (*Share details*): the recipient always sees it. Only put photos in the gallery that anyone with the link may see.

REAL-WORLD EXAMPLE

On its stylists' cards, a hair salon fills in the salon's Instagram and TikTok, a WhatsApp number for appointments and a Calendly link for online booking. In the gallery it puts four photos of hairstyles shot in landscape orientation. A client who scans the card at the front desk sees the work, books her next appointment and saves the contact, and the owner checks in analytics whether Instagram or TikTok gets opened more often.

## 9. Appearance: templates, free layout and colors

**Where:** card screen, the *1. Profile and details* (Card template) and *4. Design and colors* boxes; on the portal: the *1. Profile* and *4. Landing page colors* sections and the “Builder: free layout” screen

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal); the builder only on the portal

**Plan:** Minimal template and colors: all plans; other templates and Free layout: Single Site and higher

> Want your card to look like your brand, but have no designer? Choose one of seven templates and four colors, or arrange the card elements yourself in Free layout.

The appearance is set in three places: the template determines the layout and style, the colors are chosen by hand or from ready-made palettes, and the Free layout template has its own builder on the portal. The card content does not change in the process: the same data is simply displayed differently, so you can change the template whenever you like.

### How do you choose a template?

1. In the *1. Profile and details* box (wp-admin) or in the *1. Profile* section (portal), under *Card template*, click a template preview.
2. Save the card.
3. Open the card on a phone and check how it looks.

On the Personal plan and in demo mode, only Minimal is available; the other templates are inactive, and above them is the notice "🔒 More templates are available from the Single tier. Your current tier uses Minimal." with the *Upgrade tier* → link.

**Options: templates**

**Minimal** Default: selected · Plan: all plans

"Clean, simple, the default look". A white card on a colored background. The only template in which all four colors from *4. Design and colors* apply.

**Example:** an accounting firm chooses Minimal with the Corporate Blue palette, because it wants a calm card in the colors of its logo.

**Business** Plan: Single Site

"Professional: conservative, centered layout". A light gray card; the *Save contact* button is always black and written in capital letters, regardless of the selected colors.

**Example:** a law office chooses Business, because the centered, restrained look suits the seriousness of its work.

**Creative** Plan: Single Site

"Creative: multi-layer ring around photo, pill buttons, expressive feel". The photo is framed by a layered ring, the buttons are rounded, and the *Save contact* button is in the accent color.

**Example:** a graphic design studio chooses Creative, so the card shows its creativity at first glance.

**Futura** Plan: Single Site

“ID card layout: large photo on top, phone/email + QR in middle, 3 buttons”. A dark card that resembles an ID badge. Next to the QR code are *Phone*, *Email* and *Location* (the city). The cover image, the logo and the “Scan to save contact” caption are not shown, and the *Icon on phone display* button is always visible.

**Example:** a conference organizer gives its staff Futura cards, which look on a phone like an accreditation badge with a photo and a QR code.

**Showcase** Plan: Single Site

“Premium dark: magazine cover, photo on the right, 3-col action grid”. A dark card tinted with the accent color, in the style of a magazine cover; the action buttons come right after the position, in three columns, and the *Save contact* button is in the accent color.

**Example:** a luxury real estate agent chooses Showcase, so the card feels like part of an exclusive offer.

**Editorial** Plan: Single Site

“Refined serif typography (Playfair + Inter), luxury editorial feel”. A cream card with elegant lettering; the *Save contact* button is dark.

**Example:** a boutique hotel or a winery chooses Editorial, because serif lettering is reminiscent of a printed menu and a wine list.

**Free layout** Plan: Single Site · builder on the portal only

“Arrange elements and colors yourself (drag & drop builder)”. You set the order, visibility and colors of the elements in the builder on the portal (described below).

**Example:** a sales rep wants the *Save contact* button right below the name, ahead of everything else, so he chooses Free layout and places it there.

| Template | Element order | Which colors it respects |
|---|---|---|
| **Minimal** | basic order (The public card: what visitors see and can do) | all four; the card is white, the page background is in the selected color |
| **Business** | basic | light gray card; the *Save contact* button is always black |
| **Creative** | basic | the *Save contact* button is in the accent color |
| **Editorial** | basic | cream card; the *Save contact* button is dark |
| **Futura** | its own: photo, name and QR code at the top, description and sections below | dark card; the *Save contact* button is black |
| **Showcase** | action buttons right after the position, everything else in the basic order | dark card tinted with the accent color; the button is in the accent color |
| **Free layout** | from the builder; elements that are not in the builder go below | colors from the builder |

### How do you use Free layout?

The builder does not change the content, only the order, visibility and colors of the card's existing elements. It exists only on the portal.

1. On the portal, click *Edit* on the card, choose Free layout under *Card template* and save the card. On a new card, a notice in place of the button says that the button appears after the first save.
2. Click 🎨 *Open builder (arrange elements)*. The “Builder: free layout” screen opens, with a preview of the card on a phone.
3. In the *Theme* part, choose the *Background*, *Accent (buttons)* and *Text* colors.
4. In the *Elements* part, change the order: drag the ⠿ handle (it also works by touch) or use ▲ and ▼. Use the visibility button to hide or show an element, and choose a color for the text elements.
5. Click *Save* (top) or *Save layout* (bottom). The message “Layout saved.” confirms the save, and “Error while saving.” means you should try again.
6. *Open card* shows the real card, and ← *Back to card* takes you back to the editor.

**Options: builder**

**Background (Theme)** Default: #0f172a (dark blue)

The background color of the whole card.

**Example:** a winery sets a deep burgundy background, the color of the label on its best-known wine.

**Accent (buttons)** Default: #c2410c (orange)

The color of the *Save contact* button, of the icons on the buttons and of the other accents.

**Example:** a solar panel company chooses yellow, so the button for saving the contact stands out clearly on the dark background.

**Text (Theme)** Default: #ffffff (white)

The main text color on the card.

**Example:** with a light cream background, choose dark gray text, because white lettering on a light background is not readable.

**Element order (Elements, handle ⠿, ▲ and ▼)**

Default: Logo, Photo, Full name, Accreditations, Position / company, Tagline, Description (bio), Tags, Featured note, Buttons (actions), QR code, "Save contact" button

Twelve elements, in the order in which they appear on the card.

**Example:** a sales rep moves the "Save contact" button element right below the Full name element, and the QR code to the end, because he mostly sends his card as a link.

**Hide / Show (per element)** Default: all elements shown

Hides an element on the public card without deleting any data; clicking again brings the element back.

**Example:** on a card for an international trade fair, temporarily hide the Tags element, because the tags exist only in your local language.

**Color (per element)** Default: text color from the theme · only Full name, Position / company, Tagline and Description (bio)

A separate text color for one of the four text elements.

**Example:** leave the name white and give the tagline the brand color, so it stands out as the company's message.

**Watch out:** the preview in the builder is simplified: the buttons always read Call, Email and Website, and the QR code is only a symbol. Check the real card with the *Open card* button. The colors from the builder replace the colors from *4. Design and colors*. The cover image, *Share details*, *Icon on phone display*, Google Wallet, the Lead Capture banner and the *Contact*, *Links*, *Gallery* and *Social media and links* sections are not builder elements: they are always shown below the arranged elements, so in this layout the cover is not at the top of the card.

**Watch out:** if you choose Free layout in wp-admin, there is no builder button there. The card then gets the default layout, with a dark background, white text and the QR code near the bottom, until you set up the layout on the portal.

### How do you set the colors?

The four colors are chosen in the *4. Design and colors* box (wp-admin) or in the *4. Landing page colors* section (portal). The on-screen instruction says: “These colors apply to the landing page that visitors see when they scan the QR code.” In wp-admin you get the WordPress color picker with a button for restoring the default color, and on the portal the browser's color picker, with the hex value displayed. The colors take full effect in the Minimal template; the other templates keep some of their own colors (table above).

**Quick presets** eight ready-made palettes

Clicking a palette fills in all four colors at once. The “Custom” label means that the current colors do not match any palette. The choice is saved only when you save the card.

**Example:** a consulting firm clicks Corporate Blue and then changes only the accent color by hand, to the exact shade of its logo.

**Primary color (text, headings)** on the portal: Main text · Default: #1c1917

In the Minimal template: the name, initials, the featured note text, tags, the text on the action buttons, contact values, network names and the background of the *Share details* button. The same color is used for the browser bar on the phone and for the icon when the card is added to the home screen.

**Example:** a clinic chooses dark green, so even the browser bar on a patient's phone takes on the clinic's color.

**Accent color (icons, hover)** on the portal: Accent / icons · Default: #c2410c

The WORK label, the frame of the featured note, the headline, certification badges, icons on the buttons and in the contacts, and the color shown on mouse hover.

**Example:** an IT company takes the turquoise from its logo, so the icons and certification badges carry the brand color.

**Page background color** on the portal: Background · Default: #f5f1ea

The background of the page around the card (in the Minimal template the card itself is white), and the background of the action buttons and of the social network rows.

**Example:** a bakery chooses a warm light beige background, reminiscent of the color of bread and the feel of the shop.

**"Save contact" button color** on the portal: "Save" button · Default: #1c1917

The background of the *Save contact* button. Applies only in the Minimal template.

**Example:** a sales rep chooses bright red, because what matters most to him is that the visitor saves the contact, and a red button is hard to miss.

| Palette | Description on screen | Primary / accent / background / button |
|---|---|---|
| **Earth Tones** | Warm earth tones: universal, professional | #1c1917 / #c2410c / #f5f1ea / #1c1917 (default colors) |
| **Corporate Blue** | Classic blue: B2B, finance, consulting | #0f172a / #2563eb / #f8fafc / #2563eb |
| **Forest Green** | Forest green: eco, sustainability, healthcare | #14532d / #65a30d / #f0fdf4 / #14532d |
| **Royal Pink** | Lilac + pink: creative agencies, luxury, design | #581c87 / #ec4899 / #fdf4ff / #581c87 |
| **Bold Red** | Bold red: sports, automotive, real estate | #1e293b / #dc2626 / #f8fafc / #dc2626 |
| **Premium Gold** | Navy blue + gold: premium brands, lawyers, finance | #0c4a6e / #ca8a04 / #f0f9ff / #0c4a6e |
| **Dark Tech** | Dark with cyan accent: dev, crypto, gaming, SaaS | #fafafa / #06b6d4 / #0a0a0a / #06b6d4 |
| **Personal Rose** | Warm rose palette: personal brand, coach, wellness | #44403c / #f43f5e / #fffafc / #f43f5e |

**Watch out:** all four colors apply only in the Minimal template. In the Business, Editorial and Futura templates, the *Save contact* button stays dark whatever you choose, and Free layout uses the colors from the builder. A public card keeps the selected template even after a move to a lower plan; if you then select Minimal in the editor, you cannot select the other templates again until you activate Single Site or a higher plan.

REAL-WORLD EXAMPLE

An interior design studio wants a dark card in the studio's colors. On the portal it selects Free layout, sets a graphite background and a copper accent in the builder, moves the "Save contact" button element right below the name and hides Accreditations. Before sending the card to clients, it opens the real card and checks that the gallery of its work and the social networks are displayed correctly below the arranged elements.

## 10. QR code: download, logo and printing

**Where:** card screen, the *QR Code* and *Branded QR* boxes; on the portal: the *QR code* button on the card and the QR code in the right column of the editor

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** QR code: all plans; logo in the QR code: Single Site and higher; separate logo per card: 5 Sites and higher

> Need a QR code for a business card, a booth or a presentation? Every card has one automatically; you only choose the size and, from the Single Site plan up, a logo in the center of the code.

The QR code contains the card's short address, not the data itself. That is why you print it only once: when you change your number, position or photo, the same QR code opens the up-to-date card. All QR codes of a card, in wp-admin, on the portal, on the card itself, in the email signature and on the virtual background, lead to the same

address. The codes are generated by the software itself, without an external service. The downloadable code is always dark gray (#1c1917) on a white background, with a white margin around the code, and it downloads only as a PNG image; neither the color nor the format can be chosen.

**Where does the QR code appear?**

| Place | Size | Logo in the center | Download |
|---|---|---|---|
| ***QR Code* box in wp-admin** | 240 pixels | yes, when the plan allows it and a logo exists | PNG 240×240 |
| ***QR code* screen on the portal** | displayed at 480 pixels; PNG at 400, 800, 1200 or 2000 pixels | no | yes |
| **right column of the editor on the portal** | 200 pixels | no | no; the *Download and options* button leads to the QR code screen |
| **public card** | 160 pixels | yes, when the plan allows it and a logo exists | no |
| **share page** | 240 pixels, in the card's primary color | no | no |
| **email signature and virtual background** | depends on the tool | yes, when the plan allows it and a logo exists | within those tools (Email signature, Virtual background and vertical card) |

### How do you download the QR code in wp-admin?

1. Open the card in QR vCard Pro → All cards.
2. In the right column, in the *QR Code* box, the text below the code reads “Scanning this QR code opens the landing page with all your details.” If the logo is active, it also reads “★ Branded QR with logo, enabled”.
3. Click ↓ *Download PNG*. A 240×240 pixel image is downloaded.

On a new card, before the first save, the box may show “Slug will be generated after first save.”, which means that the short address does not exist yet.

### How do you download a QR code for print on the portal?

1. Click *QR code* on the card, or click *Download and options* in the editor. The “QR code:” screen opens, with the card name.
2. In the *URL the QR code opens* field, check the card address.
3. In the *Download size* field, choose the size.
4. Click *Download QR code (PNG)*. The file name contains the card name and the selected size.
5. Use the *Open landing page* ↗ button to open the card and check it before printing.

Below is the “💡 Usage tips” box: “Print the QR code at a minimum size of 2×2 cm: smaller may not scan reliably.”, “For business cards, use medium or large resolution.”, “For billboards and larger formats, use the "Print quality" resolution.” and “The QR code stays the same even if you later edit the card details.” If the card does not have an

address yet, the screen reports “The QR code hasn't been generated yet. Open the card and save it to create the URL.”

**Options**

**↓ Download PNG** QR Code box, wp-admin only

Downloads a 240×240 pixel QR code, with the logo when the plan includes it. This size is enough for a screen, but not for high-quality print.

**Example:** a sales rep puts the code with the logo on the last slide of a presentation, so the audience scans the card straight from the projection screen.

**📋 (Copy URL)** QR Code box, wp-admin only

Copies the card address; the button briefly shows ✓.

**Example:** the administrator copies the address and pastes it into the description of an employee's LinkedIn profile.

**URL the QR code opens and Copy** QR code screen on the portal

Shows the card address; *Copy* copies it and briefly shows “✓ Copied”.

**Example:** an employee copies the address and puts it into her out-of-office reply while she is on vacation, together with a colleague's number.

**Download size** Default: Medium (800×800) · QR code screen on the portal

The values are “Small (400×400)”, “Medium (800×800)”, “Large (1200×1200)” and “Print quality (2000×2000)”. A larger image gives a sharper code when it is printed in a larger format.

**Example:** Small for a post on a website or in a digital catalog, Medium and Large for business cards, Print quality for a roll-up banner at a trade fair or a sticker on a shop door.

**Download QR code (PNG)** QR code screen on the portal

Downloads the code in the selected size, without a logo, dark gray on a white background.

**Example:** the print shop asks for a file for business cards, so you send them the Large (1200×1200) version, which stays sharp even on coated art paper.

**Per-card logo (Branded QR box: Choose logo, Change, ×)**

Default: no separate logo, the global one is used · Plan: 5 Sites · wp-admin only

Sets a logo that applies only to this card's QR codes and takes precedence over the global logo ("This is used only for this card, it overrides the global logo."). Without it, the global logo from Branding is used, and if there is none either, the code has no logo ("No logo (QR without branding)"). × removes the card's logo.

**Example:** a holding company with three companies on one site puts each company's logo on its own employees' cards, even though the global logo is the holding company's logo.

**How do you add a logo to the QR code?**

Branded QR has no switch: the logo appears on its own as soon as the plan allows it and a logo exists.

- **Personal and demo mode:** the code has no logo, and the *Branded QR* box is locked with the message "This feature is available from the Single Site ($49) tier." and the *View pricing* → link.
- **Single Site:** all codes use the global logo from QR vCard Pro → Settings → Branding, *Logo* field; it is the same logo that appears in the portal header. The box reads "The logo from Settings is used for all your cards.", and without a logo "No logo, set a global logo in Settings → Branding.", with the *Set global logo* → or *Change global logo* → button.
- **5 Sites and higher:** the card's logo, if you select one in the *Branded QR* box, and otherwise the global logo.

The logo takes up 22% of the code's width, on a white rounded field, and the code then uses the strongest error correction, so it still scans reliably. The logo appears in the code in the *QR Code* box, on the public card, in the email signature and on the virtual background. The code from the QR code screen on the portal never has a logo.

**Watch out:** there is no high-resolution QR code with a logo. wp-admin gives you 240 pixels with the logo, and the portal up to 2000 pixels without it. For print, use the code from the portal in the Large or Print quality size, and use the code with the logo on screens and in email.

**Watch out:** the *Change global logo* → button opens Settings on the General tab; click the *Branding* tab yourself.

**Watch out:** a printed QR code stops working if the card is no longer published or has been deleted, and if you change the site's domain or address. The address in the code starts the way it is entered in WordPress Settings → General (Site Address (URL)): if it says http:// there, the printed code also stays on http://, and phones warn that the connection is not secure. Before printing, check that the site address starts with https://. One card cannot be redirected to another: to make the same printed code show a different person, change the details on the same card.

REAL-WORLD EXAMPLE

A sales rep at a food products distributor prints 500 business cards with the QR code on the back, downloaded from the portal in the Print quality size and printed at 2.5×2.5 cm. For email and presentations, he uses the code with the company logo from wp-admin. When he changes his mobile number six months later, he changes it only on the card: all 500 business cards still lead to the correct number, without a reprint.

## 11. The public card: what visitors see and can do

**Where:** the card's public address, in the form `your-site.com/q/Rm4xT9`

**Who:** all visitors, without signing in; card owners, to check the appearance

**Plan:** all plans; some elements depend on the plan and on the modules that are turned on

> What exactly does someone who scans your QR code see? A mobile page with your details and buttons for calling, email, the map and saving the contact, with no sign-in and no app.

The card is a standalone page: it does not use your site's theme, so menus, chat windows, cookie banners and tracking codes from other plugins do not appear on it. For measurement and consent, the card has its own tools. The page title in the browser is “Name · Position”.

#### What does the visitor see, in order?

The order in the table applies to the Minimal template; Business, Creative and Editorial do not change it, while Futura, Showcase and Free layout do (see below the table).

| # | Element | When it is shown | What it does |
|---|---|---|---|
| **1** | language picker 🌐, top right | always | changes the card language; the choice is remembered for 30 days (Multilingual cards) |
| **2** | cover image | when it is set | banner with an 8:3 ratio |
| **3** | QR code with the caption “Scan to save contact” | always, except on a forwarded link that does not include all fields | the person you are talking to scans the card from your screen |
| **4** | company logo | when it is set | |
| **5** | photo or initials | always | |
| **6** | name, blue badge and the WORK or PERSONAL label | the name always; the badge when the license is verified and the card is marked; the label when a *Card type* is selected | on mouse hover, the badge shows “Verified by Planeta računari” |
| **7** | certification badges | when *Certifications / titles* is filled in | |
| **8** | headline | when it is filled in | |
| **9** | the “Position · Department · Company” line | when at least one of the three fields is filled in | |
| **10** | bio | when it is filled in | |
| **11** | tags | when they are filled in | |
| **12** | featured note | when it is filled in | |
| **13** | Lead Capture banner | from 5 Sites, in the Pre-Save banner or Banner + Modal (both) mode | opens the contact exchange form (Lead Capture: contact exchange on the card) |
| **14** | *Save contact* | always | downloads the contact (described below) |
| **15** | *Add to Google Wallet* | when Google Wallet is turned on and set up, and its display on the card is turned on | adds the card to Google Wallet (Google Wallet) |
| **16** | *Share details* | always | sends the card to a third person (described below) |
| **17** | *Icon on phone display* | after 3 seconds at the latest, unless the card has already been added to the home screen | adds the card to the phone's home screen (described below) |
| **18** | the *Call*, *Email*, *WhatsApp*, *Map* and *Review* buttons | first phone number; first email address; WhatsApp number entered; street or city entered; Reviews turned on | call; new message; WhatsApp chat; address search in Google Maps; review page (Google reviews) |
| **19** | the *Contact* section | at least one phone number, email address or website; the *Address* row when there is a street or city | all numbers, addresses and websites as links |
| **20** | the *Links* section | when there are featured links | |

| # | Element | When it is shown | What it does |
|---|---|---|---|
| **21** | the *Gallery* section | when there are photos | enlarged view on tap |
| **22** | the *Social media and links* section | at least one network filled in | |
| **23** | footer | always; the content depends on the plan | described below |
| **24** | links to legal pages | when the *Show notice* option is turned on and the page addresses are entered | described below |
| **25** | cookie bar with the *Decline* and *Accept* buttons, fixed at the bottom | when measurement is turned on and consent is required | described below |

The card also has two windows that are not visible right away. The “Exchange contacts” window opens on *Save contact* or on the Lead Capture banner, from the 5 Sites plan, when contact exchange is not turned off. The welcome window “🎉 Welcome, {first name}!”, with the employee's actual first name, is shown to an employee who opens the card from the one-time link for the first sign-in.

**What is the order in the other templates?**

- **Futura:** photo, name, certifications, position, the QR code with the *Phone*, *Email* and *Location* captions, *Share details*, *Save contact*, the Lead Capture banner, *Icon on phone display* (always visible), action buttons, headline, bio, tags, featured note, then the sections. The cover image, the logo and the “Scan to save contact” caption are not shown.
- **Showcase:** language picker, cover image, QR code, logo, photo, name, certifications, position, action buttons, and then everything else in the order from the table.
- **Free layout:** the order from the builder; elements that are not in the builder are shown below (Appearance: templates, free layout and colors).

**What happens when the visitor taps Save contact?**

When contact exchange is not turned on (plans below 5 Sites, or the “Off” mode), a tap downloads the contact in vCard format, as a file with the .vcf extension, with a short “Opening business card…” message, and the phone offers to add it to the address book. When exchange is turned on (from 5 Sites; the default mode is Post-Save modal), the “Exchange contacts” window opens first: *Skip* downloads the contact right away, a successful form submission downloads it after sending (unless the *Auto-download .vcf* option is turned off in the Lead Capture settings), and closing the window (X, a tap outside the window or ESC) downloads nothing. The details are in Lead Capture: contact exchange on the card.

The contact can also be downloaded directly by adding .vcf to the card address, for example `your-site.com/q/Rm4xT9.vcf`. The download is not counted as a new opening of the card.

| In the saved contact | Where it comes from |
|---|---|
| **first and last name** | *First name* and *Last name*; the card name is not used as a substitute |
| **company and department** | *Company* and *Department*, when at least one of them is filled in |
| **job title** | *Position* |
| **phone numbers** | all phone numbers; Mobile goes in as mobile, Work as work, Home as home, Fax as fax, and Other without a specific type |
| **email addresses** | all addresses; Business goes in as work, Personal as home, and Other without a specific type |
| **websites** | all websites |
| **address (work)** | street, city, region, postal code and country, when there is a street, city or country |
| **note** | *Headline / tagline*, *Certifications / titles* and *Bio*, separated by a blank line |
| **categories** | *Tags / skills* |
| **social network profiles** | all 20 networks, exactly as entered (for WhatsApp, the phone number) |
| **photo** | *Profile photo*, only if the original file is a JPG or PNG of up to 100 KB |

The logo, the cover image, the gallery, featured links, the featured note, the card label and the address of the card itself do not go into the contact. The file carries the person's first and last name (for example `FirstName-LastName.vcf`, and without a name `kontakt.vcf`), and the texts are in the language in which the visitor is viewing the card.

### How does Share details work?

Every visitor sees the *Share details* button. It opens the "📤 Share details" window, in which the visitor sends your card to a third person:

1. In the "Email or phone number" field, they enter the recipient's address or number.
2. Under "📋 What do you want to send?", they choose the fields, one by one or with the "All" and "None" buttons.
3. They tap "✉️ Send".

For an email address, the site sends the message "Business card from …" with your name and the "📇 Open business card" button; replies to that message go to your first email address. For a phone number, the visitor's SMS app opens with a message and a link. The link shows only the selected fields and is valid for 30 days. Below the form are also the "or share via" buttons: WhatsApp, Viber, Telegram, SMS and "📋 Copy", which share the full card link, without a selection of fields.

| Group | Fields | Preselected |
|---|---|---|
| **Basic** | Full name (always), Position, Department, Company, Tagline / Headline, Certifications / Accreditations, Tags, Short description, Featured note | name, position, company |
| **Images** | Profile photo, Company logo, Cover image | profile photo |
| **Contact** | each phone number, each email address and each website separately, Address | all phone numbers and email addresses |
| **Social networks, Messaging apps, Professional / Payments** | each network that is filled in | none |

The window shows only the fields that are filled in on the card. The QR code stays on the forwarded card only if all fields are selected. The recipient of a forwarded link can pass on only what they received themselves. At most 10 messages per hour can be sent from one IP address; after that, the message “Limit of 10 emails sent per hour exceeded. Please try again later.” appears. If the site cannot send email, the visitor sees “Sending the email failed. Check the site's SMTP configuration.”

> **Watch out:** the selection of fields limits only what that particular link displays; it is not data protection, because the card stays public. Anyone who removes the part starting with `?share=` from the link sees the whole card, and after 30 days the same link shows the whole card on its own. The gallery and featured links are never filtered, and the link preview in messages and the data for search engines still contain the position, company, description and photo. Sent links cannot be reviewed or revoked. Only put information on the card that you are comfortable showing to anyone.

### How do you create a share page?

The share page is a small tool for card owners: from a phone, with one tap, they can send their card by email or SMS, share it through WhatsApp, Viber or Telegram, or show the QR code to the person they are talking to. The software does not create this page on its own.

1. In WordPress, create a new page, for example “Share my card”.
2. In its content, enter the shortcode `[qrvp_share]` and publish the page.
3. Send the page address to the people who have cards. They open it while signed in and add it to their phone's home screen through the “ 📱 Add an icon to your home screen for 1-tap access” prompt.

On the page, the owner chooses the card in the “Card:” field (if there are several, up to 50 are shown), enters the recipient in “Send my card:” and taps “📤 Send”. The site sends the email, and for a phone number an SMS opens with the message “Hi! Here is my business card:” and the link. The “or share quickly” part offers WhatsApp, Viber, Telegram and “Copy”, and “Show QR code for scanning” opens the QR code in the card's primary color. A visitor who is not signed in sees “You must be signed in to share a card.” and the “Sign in” link, and a user without a published card sees “You don't have any published cards to share.”

**The [qrvp_share] shortcode and the card_id attribute** Default: the signed-in user's first published card

Without the attribute, the page preselects the signed-in user's first card. With the attribute, for example `[qrvp_share card_id="125"]`, it preselects the card with that number, but only if the signed-in user owns it; otherwise it selects that user's first card. You can find the card number in the address of the card's edit screen in wp-admin.

**Example:** a company creates a “Share my card” page with the shortcode and sends it to all its sales reps; at a meeting, each rep opens the icon on their phone and sends their card to the customer by SMS within seconds.

**Note:** when a share page exists, the one-time link for the first sign-in of new employees leads to its address (Login, password and first sign-in). This page always sends the full card link, without a selection of fields; the QR code on it has no logo and cannot be downloaded. Even the administrator sees only the cards they own here.

**How is the card added to the phone's home screen?**

Every visitor sees the *Icon on phone display* button, after three seconds at the latest, unless the card has already been added to the home screen. What happens after the tap depends on the phone and the browser:

- Chrome and Edge, when the browser offers installation: the built-in installation starts.
- iPhone: a window with three steps: the share button, then “Add to Home Screen” and “Add”.
- Android browsers other than Chrome (Samsung Internet, Opera, Firefox and others): the instructions “Tap the browser menu (☰ or ⋮).” and “Choose "Add to Home screen"”, with separate steps for Samsung phones.
- Others: an instruction to choose “Install app” in the ⋮ menu.

The icon carries the first and last name from the card (the shorter name below the icon has up to 12 characters), the card's primary color and the profile photo or, if there is no photo, the company logo. An employee who opens the card from the one-time link also sees the welcome window “🎉 Welcome, {first name}!” with the text “This is your digital business card. Add it as an icon on your phone for 1-tap access.”, the steps for their phone and the “Got it, thanks!” button. Once they close it, the window does not appear again in that browser.

**How does a card link look when sent in a message?**

When you send the card link through WhatsApp, Viber, LinkedIn or a similar app, the app shows a preview with the name, the “Position · Company” line and the profile photo. The systems those apps use to build the preview are not counted as visits. For search engines, the card has a description made up of the position, the company and the beginning of the bio, up to 160 characters; whether the card appears in search at all is determined in SEO and search visibility (by default it does not).

**Watch out:** without a profile photo, the link preview in WhatsApp and Viber has no image. If you want an image in the preview, add a photo to the card.

**What does the visitor see of consent and legal links?**

When you have turned on visit measurement (Google Analytics or Tag Manager in the Marketing module) or advertising pixels, and consent is required, which is the default, a bar appears at the bottom of the card: “This page uses cookies for analytics and advertising. You can accept or decline. Without your consent, none of it is loaded.”

The *Accept* button remembers the choice for a year and reloads the page, and only then do the measurement codes load; *Decline* hides the bar and nothing is loaded. Without measurement set up, the bar does not appear. The consent rule is described in Retargeting pixels.

In QR vCard Pro → Settings → Privacy and GDPR, if the *Show notice* option is turned on, a short line appears below the card footer,"ⓘ See also Privacy Policy, Terms of Service, and Cookie Policy.", with links to the pages whose addresses you entered on the same tab. The line contains only the policies that have an address; for the privacy policy, if you leave the field empty, the privacy policy page selected in WordPress Settings → Privacy is used. The data processing agreement is not shown in this line. See Privacy and GDPR.

**What does the card footer say?**

| Plan | Footer |
|---|---|
| **demo mode and Personal** | "★ Made with Planeta QR vCard Pro free · Try it →", with a link to the free sign-up; cannot be hidden |
| **Single Site, 5 Sites, Unlimited** | "Powered by QR vCard Pro · Planeta računari"; cannot be hidden |
| **Agency** | the same, with the product and vendor names from the White-label settings when White-label is active, or no footer when Footer credit is turned off in Branding (Branding, White-label) |

**What is recorded while the visitor uses the card?**

When scan logging is turned on, every opening of the card is recorded (excluding bots), as well as taps on *Save contact*, phone, email, website, social networks and *Map*. Downloading the contact is not counted as a new opening. What can be seen, and where, is described in Analytics: what is measured and where to see it.

**What does the visitor see when the card does not work?**

If the card is not published or has been deleted, its address and QR code show a page with the heading "QR card not found" and the text "This QR code is no longer active or has been deleted."

REAL-WORLD EXAMPLE

At an agricultural trade fair, a buyer scans the QR code at the booth of an irrigation system manufacturer. The card opens in an instant, the buyer saves the sales rep's contact, and then uses *Share details* to send a colleague in purchasing only the rep's position, company and phone number. The colleague receives an email, opens the card with the selected details and calls the same day to ask for a quote, and the rep sees in analytics that the card was opened twice.

## 12. Multilingual cards

**Where:** fields with language tabs in the card editor (wp-admin and portal); the 🌐 language picker on the public card

**Who:** everyone who edits cards; visitors choose the language; the language settings are changed by the Administrator

**Plan:** all plans; ✨ *Auto-translate* requires an OpenAI key

> Do you have visitors from abroad? You can enter the card texts in 11 languages, and each visitor automatically sees the version in their phone's language or chooses one themselves.

The card distinguishes two kinds of text. Content is what you entered yourself: the position, the description, link titles. You enter it per language, in the language tabs. Interface labels are the buttons and section headings, such as *Save contact* or *Contact*; the software translates those on its own.

### How do you enter text in several languages?

Above the translatable fields is a row of tabs with 11 languages: Srpski, English (US), English (UK), Deutsch, Français, Español, Hrvatski, Slovenščina, Русский, 日本語 and 简体中文. Srpski (Serbian) is the source language and is marked with a star ★. A dot ● on a tab shows that there is text in that language. When the editor opens, the active tab is the language of your WordPress site, if it is one of these 11, and otherwise Srpski. The tabs exist both in wp-admin and on the portal.

1. Open the card and, in a translatable field, enter the text in the Srpski tab.
2. Click the tab of another language and enter the translation, or click ✨ *Auto-translate* to fill in all the other languages.
3. Review the translations tab by tab and correct whatever needs it.
4. Repeat for the other fields and save the card.

| Has language tabs | No language tabs (same in all languages) |
|---|---|
| **Position, Department, Company, Certifications / titles, Headline / tagline, Bio, Tags / skills, Featured note, the title and description of a featured link** | First name, Last name, card name, phone numbers, email addresses, websites, address, social networks, Card type, images |

### Options

**Language tabs** Default: the tab of the site language, or Srpski, is active

Each tab stores the field's text for one language. An empty tab is not an error: the visitor then sees a fallback language (described below).

**Example:** a hotel in a mountain resort fills in Srpski, English (US) and Русский, because it has many guests from Russia, and leaves the other tabs empty.

**✨ Auto-translate** requires an OpenAI key

Translates the text from the Srpski tab and fills in the other 10 languages, through the OpenAI service. The Administrator enters the key in QR vCard Pro → Settings → Lead Capture, in the *OpenAI API Key* field. Without a key, the message “The OpenAI API key is not configured. Go to Settings → Lead Capture → Auto-Translation.” appears. While it works, it shows “Translating...”, and at the end “✓ Translated into all languages” or “Translation error. Please try again.” One user can send at most 20 requests per minute (“Too many requests. Please wait a few seconds.”), and the text of one field can have at most about 100,000 characters.

**Example:** before a trade fair in Munich, an IT company enters its bio in the Srpski tab, clicks ✨ *Auto-translate*, and then corrects by hand, in the Deutsch tab, the technical terms its German partner uses.

**Link with ?lang=** Default: no parameter, the language is chosen automatically

When you add `?lang=` and a language code to the card address, the card opens in that language, and the choice is remembered in the browser for 30 days. The codes are `sr_RS`, `en_US`, `en_GB`, `de_DE`, `fr_FR`, `es_ES`, `hr`, `sl_SI`, `ru_RU`, `ja` and `zh_CN`. The QR code always contains the address without this addition.

**Example:** in a quote for a German customer, you send the link `your-site.com/q/Rm4xT9?lang=de_DE`, so the customer sees the card in German even if their phone is set to English.

**In which language does the visitor see the card?**

For content, the software checks in this order: the language from the link (`?lang=`), the language the visitor chose earlier in the picker, the phone or browser language, the language of your WordPress site and, finally, Serbian.

If a field is not filled in for the chosen language, the same language in another variant is shown (for example, a visitor with Austrian German sees the Deutsch tab), then English (US), then Srpski and, finally, the first language that is filled in. A field is never shown empty if it is filled in for at least one language.

The software has its interface labels translated into the same 11 languages. For them, the order is: the language from the link or the picker, then the browser language if *Auto-detect language* is turned on, then *Default landing language*, then the site language. Both settings are in QR vCard Pro → Settings → Language and are described in Portal language, card language and automatic translation.

**How does the visitor change the language?**

The 🌐 language picker in the top right corner of the card always offers all 11 languages. After a choice, the page reloads in the selected language, and the choice is remembered in that browser for 30 days and applies to all cards on your site and to the portal. The picker is also in the portal header and on the portal sign-in page.

**Watch out:** ✨ *Auto-translate* always translates from the Srpski tab. If the text is entered only in English (US), you get the message “Fill in the Srpski (Serbian) or English (US) tab before auto-translating.”, even though English is filled in: enter the text in the Srpski tab first. Automatic translation overwrites the existing translations in all the other tabs, including those you polished by hand, so make your manual corrections only after it. Every translation uses credit on the OpenAI account whose key is entered, also when an employee does the translating.

**Watch out:** the picker offers all languages even when the card is filled in only in Serbian; a visitor who chooses Deutsch then sees the text from the English (US) tab, if it is filled in, or the Serbian text, with the labels in German. *Default landing language* and turning off auto-detection change only the labels, not the content, so a visitor may see English buttons and German card text. Choosing a language on the portal also changes the language in which you see the cards in the same browser.

**Note:** a few short messages to the visitor are always in Serbian, whatever language is selected: “Otvaranje vizit-karte…” (Opening business card…), “✓ Link kopiran!” (Link copied!), “✓ Email je poslat!” (Email sent!), the messages after the contact exchange form is submitted, the SMS text when the card is forwarded, the instructions for adding the icon on an iPhone, the window with the legal pages and the “QR kartica nije pronađena” (QR card not found) page. A visitor whose phone asks for Italian or Macedonian sees the labels in Serbian, because the labels are not translated into these two languages.

REAL-WORLD EXAMPLE

A winery exhibits at a wine fair in Germany. On the card, the winemaker enters the position, the bio and the link titles in Serbian, clicks ✨ *Auto-translate* in each field, and then corrects the names of the grape varieties by hand in the Deutsch and English (US) tabs. Visitors with German phones automatically see the card in German, and domestic customers see it in Serbian, from the same QR code.

## 13. Card list, statuses, deletion and limits

**Where:** QR vCard Pro → All cards; on the portal: *Cards* or *My card*

**Who:** Administrator (wp-admin and portal); Card Manager (all cards, on the portal); Employee and Team member (their own cards, on the portal)

**Plan:** all plans; Personal at most two cards; the Verified badge requires a verified license

> Need an overview of all cards, to switch one card off for a while or to delete the card of someone who has left? All of this is done from the card list, and whether a card's QR code works depends on the card's status.

**What does the All cards list in wp-admin show?**

| Column | Content |
|---|---|
| ***Card*** | card name |
| ***Person*** | first and last name (or the card name), with “position · company” below |
| ***URL*** | the card address, which opens in a new browser tab; “(pending)” until the address exists |
| ***Verified*** | the badge state (option below) |
| ***Total scans*** | the number of card views since the beginning |
| ***Today*** | the number of views today, for example “+3”, or “0” |
| ***Date*** | the WordPress publish date |

Below the card name are the WordPress actions for editing, Quick Edit and moving to the Trash, plus two actions of the software: *Open landing page* (opens the card) and *Analytics* (opens that card's analytics). The bulk actions are the WordPress ones and, with a verified license, ✓ *Mark as Verified* and *Remove Verified status*. The search field (“Search Cards”) searches by card name, not by the name, company or phone number on the card.

**What does the card list on the portal show?**

The Administrator and the Card Manager see the *Cards* item and all of the company's published cards (at most the 200 newest), while Employees and Team members see the *My card* item and only their own published cards. At the top are the “Total cards”, “Total scans” and “Scans today” counters, the quick actions bar and the heading “Your QR vCards” with the *New vCard* button. Anyone without a card sees the welcome screen or the message “You don't have any QR vCards yet” with the *Create your first vCard* button.

| On the card tile | What it does |
|---|---|
| **photo or initials, name, “position · company” and the card address with ↗** | the address opens the card |
| **“total” and “today”** | the number of card views |
| ***Edit*** | opens the editor (Creating and editing a card) |
| ***Statistics*** | statistics for that card (Analytics: what is measured and where to see it) |
| ***QR code*** | QR code download (QR code: download, logo and printing) |
| ***Email signature* and *Virtual background*** | always on the tile, and they work from the 5 Sites plan |
| ***Contacts* with a number** | the contacts left on that card, from the 5 Sites plan |
| ***Delete*** | moves the card to the Trash (option below) |

The quick actions bar offers *New card*, *Statistics*, *Email signature* (5 Sites), *Contacts* (5 Sites) and *Start tutorial*. In the bar, *Statistics* and *Email signature* offer only your own cards, even for the Card Manager. *Start tutorial* does not walk you through existing cards; it creates a new card through Quick Start.

**Options**

**Verified (column in All cards: Mark, VERIFIED)**

Default: new cards are not marked · Administrator only · requires a verified license

Clicking *Mark* turns on the blue badge next to the name on the card, and clicking *VERIFIED* turns it off. The badge is shown only while the license is active and verified; the license is verified by the vendor. Without a verified license, the column shows “Not eligible”. When the license becomes verified for the first time, all existing cards are marked automatically, once. On mouse hover, the badge shows “Verified by Planeta računari”, even when you use White-label. The card owner cannot turn on the badge themselves.

**Example:** a bank marks the cards of the staff who work with clients, so a client knows at a glance that the card is not fake.

**✓ Mark as Verified and Remove Verified status** bulk actions in All cards · requires a verified license

Turns the badge on or off for all checked cards at once.

**Example:** after importing 40 new cards, the administrator checks all of them and marks them as Verified with a single action.

**Card status (WordPress Publish box and Quick Edit)** Default: published · Administrator only, in wp-admin

Only a published card works. In any other status (draft, pending, private, scheduled) and in the Trash, the card address, the contact download and the QR code show the “QR card not found” page. The card address does not change in the process, so when you publish the card again, the same QR code works again. The portal does not show cards that are not published.

**Example:** an employee goes on maternity leave; the administrator switches her card to draft and, when she returns, publishes it again, and the old QR code on her business cards works once more.

**Delete** card tile on the portal

After the confirmation “Are you sure? This action cannot be undone.”, the card is moved to the Trash, and the portal reports “Card deleted.” The card stops working immediately. Despite the wording of the confirmation, the Administrator can restore the card from the Trash in wp-admin.

**Example:** an employee created a test card while learning the portal; they delete it so that only the real card stays in the list.

**× (Hide toolbar)** quick actions bar on the portal

Hides the quick actions bar. Hiding is permanent: the interface has no button for bringing the bar back, and the same actions remain available through the menu and the card tiles.

**Example:** a Card Manager who works with many cards hides the bar only once they are used to the tiles and the menu, to keep the list easier to scan.

**What happens when you delete a card?**

- **Moving to the Trash** (*Delete* on the portal, or Trash in wp-admin): the card stops working, and its QR code shows “QR card not found”.
- **Restoring from the Trash** (wp-admin only): after restoring, check the card status and, if the card is not published, publish it. The address stays the same, so the same QR code works again.
- **Permanent deletion from the Trash** (wp-admin only): the printed QR codes and sent links of that card stop working for good.

**Watch out:** before you permanently delete the card of someone who has left, consider whether it is better to hand the card over to their successor: change the details and the card author, so the same QR code on business cards, catalogs and signs that are already out there leads to the new person.

**Note:** Quick Edit in wp-admin also offers password protection, but the software ignores it: the card is still shown to everyone. Clicking the *Total scans* column heading does not sort the list.

**How many cards can you have?**

In demo mode, at most three cards can be published, Personal allows at most two cards on the entire site, and Single Site and higher plans have no limit. The limit applies both in wp-admin and on the portal; when it is reached, the new card stays a draft and is not published, and the software reports that the plan limit has been reached. The details are in Plans, license and updates.

In addition, the Administrator and the Card Manager can set *Maximum cards per person* for employees and team members. When a person reaches that number, the *New vCard* button disappears, and the list shows “You have reached the allowed number of cards (N). Contact the administrator for a new card.” The setting is described in Employees.

**Watch out:** the per-person limit also counts drafts, which are not visible on the portal. If an employee cannot create a card even though the list shows fewer cards than allowed, the Administrator should check in wp-admin whether that person has drafts, and publish or delete them.

REAL-WORLD EXAMPLE

A building materials distributor with 25 sales reps is on the Unlimited plan and sets *Maximum cards per person* to 2, for a standard card and a trade fair card. When one sales rep leaves the company, the administrator does not delete his card, but enters the successor's details and changes the card author, so the catalogs with the QR code that customers already have lead to the new person. The test cards the reps created while learning the portal they delete themselves, with the *Delete* button.

# 14. Lead Capture: contact exchange on the card

**Where:** QR vCard Pro → Settings → Lead Capture; on the portal: *Settings* → *Lead Capture*; strategy for a single card: on the portal, *Edit* → *5. Lead Capture (per card)*

**Who:** the Lead Capture tab is changed by the Administrator; the strategy of a single card can be changed by anyone allowed to edit that card

**Plan:** 5 Sites and higher; custom form Unlimited and higher

> A visitor scanned your QR code and saved your number, but you know nothing about them? Lead Capture invites them, at that very moment, to leave their details for you too, so the contact no longer goes in only one direction.

When a visitor taps *Save contact* on the card, they receive your vCard as a .vcf file, which the phone adds to its contacts. Before that, Lead Capture opens a short exchange window where the visitor enters a name and email and, optionally, a phone number, company and message. Every submission becomes a contact (lead), as described in Contacts: overview, tags, notes and export, and the card owner receives an email notification.

The exchange works as soon as the license allows it. The default strategy is *Post-Save modal (recommended)*, so you do not have to set up or save anything. On plans below 5 Sites, the tab shows the warning *Contact Exchange is a 5 Sites+ feature*: you can prepare and save the settings, but they take effect only after an upgrade, and until then the *Save contact* button only downloads the vCard.

**What does the visitor see in the exchange window?**

- an X button for closing it;
- the title from the *Modal title* field (default “Let's exchange business cards”), or, in the gated strategy, from the *Gated title* field;
- the subtitle “Send [your name] your details so they can reach out to you too.”, or, in the gated strategy, the text from the *Gated subtitle* field;
- the form fields: name and email are always visible, while phone, company and message can be tucked away behind the *+ More details (optional)* button;
- a consent checkbox with links to the legal pages (described below, in the part about consent);
- the *Skip* button and the submit button, with the text from the *Submit button text* field (default “Exchange contact”).

The outcome depends on how the visitor leaves the window. With X, a tap outside the window or the Esc key, the window closes, the vCard is not downloaded and nothing is recorded. With *Skip*, the window closes, the vCard is downloaded and analytics records *Contact saved*. After a successful submission, the form disappears and a green check mark appears, with the text from the *Success message* field and, below it, the text from the *Subtitle / motivation* field. The vCard downloads after about 0.8 seconds (if *Auto-download .vcf* is on), and the window closes after about 2 seconds.

### How does each strategy behave?

The same rule applies in every strategy except *Off*: the vCard is not downloaded at the moment of the tap on *Save contact*, but only when the visitor submits the form or chooses to skip it. The strategies differ in where the offer appears, which texts the visitor reads and under which source the contact arrives in Contacts.

***Off***

1. The visitor taps *Save contact*.
2. The vCard downloads right away, with a short message, “Otvaranje vizit-karte…” (Opening business card…). There is neither a window nor a banner.

**When to choose it:** when you do not need visitors' details, for example on the card of an emergency repair service that people open only to call you.

***Post-Save modal (recommended)***

1. The visitor taps *Save contact* and the exchange window opens immediately. Although the name suggests otherwise, the vCard is not downloaded yet at that moment.
2. If they fill in and submit the form, the contact reaches you with the source *Post-Save*, and your vCard downloads for them.
3. If they tap *Skip*, they get the vCard without sending their own details.

**When to choose it:** for an everyday card. The offer appears exactly when the visitor has shown interest in your contact, and the option to skip is clear and puts no pressure on anyone.

***Pre-Save CTA banner (soft prompt)***

1. Above the *Save contact* button there is a banner with a pulsing exchange icon, the texts from the *Banner text* and *Banner CTA* fields, and an arrow.
2. A tap on the banner opens the exchange window; the contact gets the source *Banner*.
3. A tap on *Save contact* opens the same window. If the visitor has not tapped the banner before that, the contact gets the source *Form*.
4. After a successful submission, the banner disappears from the card.

**When to choose it:** when you want the offer to be visible as soon as the card opens, before the visitor decides what to do. For the visitor, this strategy and *Banner + Post-Save modal (combination)* behave the same way. The combination gives you a clearer picture, because in Contacts it separates a tap on the banner (*Banner*) from a tap on the button (*Post-Save*), so we recommend it instead.

***Gated: the modal blocks the download (highest conversion)***

1. The visitor taps *Save contact* and a window opens with the texts from the *Gated title* and *Gated subtitle* fields. A contact they submit gets the source *Gated*.
2. If they do not want to leave their details, they have two ways out. *Skip*, which in this strategy looks like an underlined link, downloads the vCard and records *Contact saved*. An additional link with the text from the *Skip button text* field (default “Just download”) also downloads the vCard, but that download is not recorded in analytics.
3. Submitting the form works as in the other strategies.

**When to choose it:** at trade fairs, conferences and business meetings, where exchanging contacts is the whole point of the conversation. The visitor can still skip the form, but the exchange is presented as the first step. On an everyday card, some people find this approach intrusive.

***Banner + Post-Save modal (combination)***

1. The banner above the button works as in the *Pre-Save CTA banner (soft prompt)* strategy; a contact sent after a tap on the banner gets the source *Banner*.
2. The *Save contact* button works as in the *Post-Save modal (recommended)* strategy; the contact gets the source *Post-Save*.

**When to choose it:** when you want the offer to stand out both right after the card opens and at the moment the contact is saved, for example on a card you send by email or share on social networks.

**How do you test the exchange through a visitor's eyes?**

1. At the bottom of the tab, in the *Test link* section, click *card list* → and open the public URL of a card in a private browser window (Incognito).
2. Tap *Save contact* or the banner and go through the window as a visitor would.
3. Keep in mind that a test submission is a real contact: the card owner receives a notification, and follow-up, webhooks and Odoo run as well, if you use them. Delete the contact in Contacts after the test.
4. A new test submission to the same card from the same network is possible only after 5 minutes.

**Options on the Lead Capture tab**

The sections of the tab are shown according to the selected strategy: *2. Modal text* for Post-Save, Gated and the combination; *3. Pre-Save CTA banner* for the banner and the combination; *4. Gated mode text* only for Gated; *5. Form fields* and *6. After successful submission* for all strategies except *Off*; *5b. Custom form (visual builder)* always. Values in hidden sections are not lost and are saved together with the rest. You confirm changes with the *Save changes* button.

**OpenAI API Key** Default: empty

The key of your OpenAI account, in the 🌐 *Multilingual support* section. The same key is used by the *Auto-translate* button for multilingual texts, by the Paper business card scanner and by the AI assistant. The *Check key* button checks the key immediately and reports "✓ The OpenAI API key is valid." or the reason for the error. The *Supported languages* row lists the 11 languages into which texts are translated. The introductory text of the section mentions DeepL, but translation works only through this OpenAI key.

The key is stored when you save the tab. If you empty the field and save, the key is deleted and all the tools listed above stop working. OpenAI bills every translation and every scan to the account the key belongs to.

**Example:** the administrator creates a key in the company's OpenAI account, pastes it into the field, clicks *Check key* and saves the tab; from that moment, employees can scan paper business cards on the portal.

**1. Strategy** Default: Post-Save modal (recommended)

The main choice on the tab: *Off*, *Post-Save modal (recommended)*, *Pre-Save CTA banner (soft prompt)*, *Gated: the modal blocks the download (highest conversion)* or *Banner + Post-Save modal (combination)*. It applies to all cards that do not have their own strategy. What the visitor experiences in each of them is described above.

**Example:** a dental practice keeps *Post-Save modal (recommended)*: a patient who saves the practice's number can leave their own number too, but nothing forces them to.

**Modal title** Default: “Let's exchange business cards”

The title of the exchange window, replacing the built-in “Exchange contacts”. It applies in the Post-Save, banner and combination strategies; in the gated strategy, *Gated title* takes its place. The *2. Modal text* section is not visible when *Pre-Save CTA banner (soft prompt)* is selected, even though the title and the button text apply then as well. To change them for that strategy, temporarily select the combination, edit the texts, switch back to the banner and save the tab.

**Example:** a law office enters “Leave your details to book a first consultation”.

**Subtitle / motivation** Default: “Send me your contact. I'll always send you mine when it changes.”

Despite its name, this text is not shown in the window before submission: the window's subtitle is always the sentence with your name. The visitor sees this text only after a successful submission, below the success message, so write it as an announcement of what comes next.

**Example:** “We will get back to you with an offer within one business day.”

**Submit button text** Default: “Exchange contact”

The text on the submit button, replacing the built-in “Send my details”. While the submission is in progress, the button is disabled, so the visitor cannot press it twice.

**Example:** a real estate agency enters “Send me an offer”.

**Banner text** Default: “Let's exchange business cards”

The title of the banner above the *Save contact* button, in the strategies with a banner.

**Example:** a restaurant enters “Bookings for groups and celebrations”.

**Banner CTA** Default: “Quick exchange in 10 seconds”

Smaller text below the banner title: an invitation to tap the banner.

**Example:** with the title from the previous example, the restaurant enters “Leave your contact and we will get back to you the same day”.

**Gated title** Default: “Almost done, let's exchange contacts”

The window title in the gated strategy.

**Example:** at a trade fair: “Before you download, leave your contact too”.

**Gated subtitle** Default: “Send me your contact and download mine right away.”

The window subtitle in the gated strategy, replacing the sentence with your name.

**Example:** “After the fair, we will send you our new product catalog.”

**Skip button text** Default: “Just download”

The text of the additional link below the buttons in the gated strategy. The link closes the window and downloads the vCard, but that download is not counted in analytics as *Contact saved*.

**Example:** “Thanks, just the business card”.

**Optional fields: Phone, Company, Message** Default: all three checked

This option does not choose which fields the form has: the built-in form always has name, email, phone, company and message (the *Company* checkbox stands for the company field). Checked fields are tucked away behind the *+ More details (optional)* button, which reveals them, and the *- Hide additional fields* label hides them again; unchecked fields are always visible. All three cannot be visible all the time: if you check none of them, all three are tucked away behind the button. Only name and email are ever required; email cannot be left out of any form. While a custom form is active, this option does not apply (see Custom forms).

**Example:** for a repair service that cares most about the phone number, uncheck *Phone*: the number field is immediately in view, while company and message stay behind the button.

**GDPR consent: Require GDPR consent (consent checkbox)** Default: on

On: the visitor must tick the consent checkbox, otherwise the browser shows its own message and the server rejects the submission. Off: the checkbox is still shown but is not required, and the contact records whether the visitor ticked it. The option applies to all cards; the per-card strategy does not change it.

**Example:** an agency that sends offers and a newsletter to its contacts keeps the option on, so every contact sent from a card shows *GDPR consent*: ✓ Yes in Contacts.

**Enable custom form (replaces the default fields on all cards)** Default: off · Plan: Unlimited and higher

Replaces the built-in form with a form you put together in the visual builder, on all cards that do not have their own form. Below the Unlimited plan, instead of the switch, a note says that the builder is available from the Unlimited tier. The builder, the field types and the pitfalls are described in the Custom forms chapter.

**Example:** an IT company adds a dropdown “What are you interested in?” listing its services, so with every contact it knows right away what to talk about.

**Success message** Default: “Thank you! Your contact has been received.”

The heading of the message the visitor sees after a successful submission, next to the green check mark.

**Example:** “Thanks, your details have reached us!”

**Auto-download .vcf: After a successful submission, automatically start the .vcf file download** Default: on

On: the vCard downloads about 0.8 seconds after a successful submission, so the visitor gets your contact right away. Off: the vCard is not downloaded after the submission. If the visitor then taps *Save contact* again, they see only the success message, with no download button, until they reload the page.

**Example:** the card is used only to enter a prize draw at your booth and visitors do not need your vCard, so you turn the automatic download off.

**Auto-close (ms)** Default: 3000

The time in milliseconds until the window closes automatically after a successful submission, from 0 to 30,000. After a success, the window closes after about 2 seconds anyway, so the setting has an effect only when the value is below 2000. Zero and higher values do not make the message stay on screen longer.

**Example:** enter 1000 if you want the visitor to return to your card as quickly as possible after submitting.

### How do you set the strategy for a single card?

1. On the portal, open *Cards* (for employees, *My card*) and tap *Edit* on the card. The section exists only for a card that has already been saved, and the wp-admin card editor does not have it.
2. In the *5. Lead Capture (per card)* section, turn on *Set a different mode for this card*. The global strategy is shown above it.
3. In the *Mode for this card* field, choose the strategy. The list shows *Off* first, so be sure to check your choice.
4. Save the card.

Below the field, a note reads “The mode only affects how the form is displayed. All other options (text, fields, consent) are inherited from the global settings.” Texts and consent are therefore the same on all cards, and a single card can get different fields only through a separate form (Custom forms).

**Set a different mode for this card** Default: off

Enables a strategy choice for this card only. When you turn it off and save the card, the exception is deleted and the card follows the global strategy again.

**Example:** after the fair, a sales rep turns the switch off on their card, and the card goes back from the fair's Gated mode to the company strategy.

**Mode for this card** Default: Off (first item in the list)

Options: *Off*, *Post-Save modal*, *Pre-Save banner*, *Gated (must exchange before downloading)* and *Banner + Modal (both)*. The choice takes precedence over the global strategy in both directions: it can turn the exchange off on one card while the company uses it, and it can also turn it on when it is off globally.

**Example:** the company uses Post-Save globally, and switches the card for a regional trade fair to *Gated (must exchange before downloading)*.

### Consent and legal links

The consent checkbox is always in the window, with the text “I agree that [your name] may contact me and confirm I have read the Privacy Policy, Terms of Service, and Data Processing Agreement.”, followed by the line “ⓘ See also Cookie Policy.” The links open in a new tab and lead to the URLs you enter on the Privacy and GDPR tab (*Privacy policy URL*, *Terms of Service URL*, *Data Processing Agreement (DPA) URL*, *Cookie Policy URL*). For an empty field, a fallback URL is used: for the privacy policy, the WordPress privacy page if one is set, otherwise `/privacy-policy/` on your site, and for the others `/terms-of-service/`, `/dpa/` and `/cookie-policy/`.

Whether consent is required is set by the *Require GDPR consent (consent checkbox)* option. When it is required and the visitor does not tick it, the browser itself displays the message, in the browser's language. A rejected attempt of this kind does not trigger the 5-minute limit, so the visitor can try again right away.

### What is checked when a visitor submits the form?

Before sending, the browser checks that the name is not empty, that the email contains an @ sign and, when consent is required, that consent is given. If the name or the email fails the check, it shows the message “Molimo popunite ime i validan email.” (Please enter your name and a valid email.) Fields marked as required in a custom form are not checked. The server then, in this order:

1. checks a hidden field that people do not see but spam bots fill in; if it is filled in, the server responds as if the submission had succeeded but saves nothing;
2. checks that the card is published and that the plan allows contact exchange;
3. checks consent, when it is required;
4. lets through at most one submission from the same IP address to the same card in 5 minutes;
5. stores an answer from a dropdown or radio group only if it is one of the offered options, and stores any other answer as empty;
6. saves the contact if it has a name and a valid email address, and records *Contact saved* in analytics.

Messages the visitor may see: for the 5-minute limit, “Već ste poslali podatke. Molimo sačekajte par minuta.” (You have already sent your details. Please wait a few minutes.); “The email address is not valid.”; “Name and email are required.”; “Greška pri slanju. Molimo pokušajte ponovo.” (Sending failed. Please try again.); and, when the connection drops, “Greška u komunikaciji. Molimo pokušajte ponovo.” (Communication error. Please try again.) There is no built-in CAPTCHA protection; if you need one, a developer can add it. There is no duplicate check either: the same person can be recorded several times, from another card, from another network or after 5 minutes.

**What is stored with each contact?**

| Data | Where it comes from |
|---|---|
| **Card and time received** | the card the contact came from; the time follows the site's clock |
| **Name, email, phone, company, message** | the standard form fields |
| **Answers to additional fields** | only with a custom form (Custom forms) |
| **Consent** | yes or no, according to the consent checkbox |
| **Source** | how the contact was created (Post-Save, Banner, Gated, Form, Scan, Import) |
| **Country** | only when the site runs behind Cloudflare, which sends a country code; otherwise empty |
| **Campaign (UTM source, medium and name)** | when the visitor came through a campaign link (Campaigns and conversion funnel) |
| **Event** | when the card is assigned to an active event; the event name is also added to the tags |
| **Tags and note** | you enter them in Contacts; contacts from /l/ pages also get the page name as a tag automatically |
| **IP address hash** | a one-way fingerprint of the address the form was sent from, not the address itself; stored with every contact, regardless of the privacy settings |
| **Processing flags** | whether the notification to the owner was sent and whether the contact was sent to Odoo |

**Who gets notified, and what else is triggered?**

For every new contact, from any source (the form on the card, the scanner, /l/ pages, the REST API), the card owner receives an email at the address of their WordPress account. The Administrator and the Card Manager do not receive a copy. The subject line is “[QR vCard Pro] New contact from your QR card”. The text begins with the sentence “You have a new contact exchange from card” followed by the card name, and then lists the name, email, phone, company and message, if present. At the end is the line “View all contacts:” with a link: it takes the administrator to QR vCard Pro → Contacts, and everyone else to the Contacts of that card on the portal. Answers to additional fields are not included in the message.

When the contact left a phone number, the message also contains the line “Reply on WhatsApp:” with a link for a quick reply. That line is turned on and off by the option “Add a WhatsApp button to my new-contact notification for a quick manual reply (if the lead left a phone number)” on the Follow-up tab of the Marketing module (on by

default). The link works only when the number was entered with the country code, for example +1 555 ..., because the software only removes spaces and symbols from the number.

Automatic follow-up, a thank-you message to the person who left the contact, is sent only to people who left their details themselves: through the form on the card or on a /l/ page. Contacts from the paper business card scanner and contacts entered through the API never receive it. If the card has its own follow-up, only that one is sent, not the general one (card follow-up applies on the 5 Sites plan and higher; on lower plans the general one is sent). Details are in the Automatic follow-up chapter.

If you use Webhooks, every new contact triggers the *Contact received* event; if the connector from the Odoo ERP chapter is enabled, the contact is sent to Odoo automatically. When the card is assigned to an active event, the contact gets the event name as a tag (Events).

**Note:** all text fields on the tab have language tabs. You enter the text in Serbian and add translations manually (*Add language*) or automatically (*Auto-translate*, with an OpenAI key); visitors see the version in their own language. The error messages that the window generates itself (quoted in Serbian above) and the “Otvaranje vizit-karte...” message are always in Serbian. The notification to the owner is sent by WordPress through your site's mail settings: if other emails from the site do not arrive either, for example the ones for a password change, this one will not arrive either.

**Watch out:** the 5-minute limit is tied to the IP address the submission comes from. Devices on the same Wi-Fi network, for example on a trade fair's guest network, usually go online through the same address, so a second visitor on that network may get the message “Već ste poslali podatke...” (You have already sent your details...) if they send their details to the same card within 5 minutes. At your booth, ask visitors to use mobile data. The same limit also applies when the server rejects an email address (for example, one without a dot in the domain): the visitor then has to wait 5 minutes, so look at the address before it is sent when you exchange contacts in person.

**Watch out:** if the pages `/terms-of-service/`, `/dpa/` or `/cookie-policy/` do not exist on the site and you have not entered the URLs on the Privacy and GDPR tab, the links next to the consent checkbox lead to a page that does not exist (a 404 error). Before you turn on the exchange, create those pages or enter the URLs of existing ones.

**Watch out:** consent does not stop the other steps. The notification, webhooks and Odoo run for every contact, and follow-up runs for every contact the person left themselves, regardless of whether they ticked the consent checkbox. If consent is a condition for any further communication, keep *Require GDPR consent (consent checkbox)* on.

**Watch out:** an employee who is allowed to edit their own card can change its strategy themselves, and can even set it to *Off*. If contact exchange is mandatory in your company, agree on it with the team and check the *5. Lead Capture (per card)* section on their cards from time to time.

REAL-WORLD EXAMPLE

A real estate agency uses *Post-Save modal (recommended)* globally, because clients most often open the card from an email signature. Before a big real estate fair, the agents switch their cards on the portal to *Gated (must exchange before downloading)*, and the administrator enters "Leave your contact for offers on apartments under construction" in *Gated title*. Every contact from the booth arrives with the source *Gated* and a notification to the agent whose card it is, so the agent gets in touch the same day. After the fair, the agents turn off *Set a different mode for this card* and the cards go back to the company strategy.

## 15. Custom forms

**Where:** QR vCard Pro → Settings → Lead Capture, section *5b. Custom form (visual builder)* (on the portal: *Settings* → *Lead Capture*); form for a single card: QR vCard Pro → All cards → edit the card, *Custom contact capture form* box

**Who:** forms are created and changed by the Administrator; the Card Manager, Employees and Team members see the form on their cards

**Plan:** Unlimited and higher

> You need more than a name and an email, for example which service the visitor is interested in or when they would like you to call? In the form builder, you add your own questions and change the order of the fields, for all cards at once or for just one.

Without a custom form, the exchange window (Lead Capture: contact exchange on the card) has a built-in form: *Your name* (required), *Email* (required), *Phone*, *Company* and *Message (optional)*. The visual builder lets you add new fields, change labels and their order, and delete fields you do not need. Name and email are always required and cannot be deleted; if they are missing from the form, the software adds them at the beginning on its own.

The standard fields (name, email, phone, company, message) are written to their own columns in Contacts. All other fields are additional: their answers are stored together, as "custom fields" attached to the contact.

**Which form applies on a card?**

1. If the card has its own form (*Use a separate form for this card* is on), that form applies.
2. If it does not, the global form from the Lead Capture tab applies, when it is enabled.
3. If there is no global form either, the built-in form applies.

The form does not depend on the exchange strategy: the strategy determines when the window opens, and the form determines what the visitor fills in.

### How do you create a global form?

1. Open QR vCard Pro → Settings → Lead Capture and scroll down to the *5b. Custom form (visual builder)* section.
2. Turn on *Enable custom form (replaces the default fields on all cards)*. The builder already contains the fields of the built-in form, so you start from there.
3. In the *Add field:* bar, choose the type of the new field. The field is added at the end of the list, with the key `polje` (Serbian for "field"; the next one gets `polje_2`, and so on) and a label equal to the type name.

4. Set the field's options. You change the order by dragging the ⋮⋮ handle, and you delete a field with the × button (*Delete*). Each field carries the tag *standard* or *custom*.
5. On the right, in the *Form preview* area, follow how the form will look to the visitor. An empty list shows the message “No fields. Add a field above.”
6. Click *Save changes*.

### How do you create a form for a single card?

1. In wp-admin, open QR vCard Pro → All cards and edit the card you want. This option does not exist on the portal.
2. In the *Custom contact capture form* box, turn on *Use a separate form for this card*. The builder opens with the global form or, if there is none, with the built-in one.
3. Edit the fields the same way as for the global form and save the card.

When you turn the switch off and save the card, its separate form is deleted and the card uses the global or the built-in form again.

#### Field types

| Type | What the visitor sees | How the answer is stored | Example use |
|---|---|---|---|
| **Text** | a single-line field | up to 255 characters | “City” or “Project name” |
| **Email** | a field for an email address | up to 255 characters; the address is not validated | “Billing email”, when it differs from the contact address |
| **Phone** | a field for a number; on a phone, it opens the numeric keypad | up to 255 characters | “Viber number” |
| **Multi-line** | a larger field for longer text | up to 255 characters in the browser | “Briefly describe what you need” |
| **Dropdown** | a list from which one value is chosen; the first item is the placeholder or “Select an option” | only one of the offered options | “Which service are you interested in?” |
| **Radio** | all options visible at once, one is chosen | only one of the offered options | “When should we call you?” with the options Morning and Afternoon |
| **Checkbox** | a single box to tick | checked or not; in the export, “Da” (yes) | “I want to receive notifications about promotions” |

A field's type cannot be changed after the field has been added. If you need a different type, delete the field and add a new one.

#### Options

**Enable custom form (replaces the default fields on all cards)** Default: off

Enables the global form from the builder on the Lead Capture tab. It applies to all cards that do not have their own form. When you turn it off and save the tab, the saved global form is deleted.

**Example:** an air conditioning service company adds the field “How many units need servicing?” and it appears on the cards of all its technicians.

**Use a separate form for this card** Default: off

Gives one card a form that takes precedence over the global one. Below the switch, a note says that a card without a separate form uses the global form from the settings or the default fields.

**Example:** the trade fair card gets an additional Checkbox field, “Send me the catalog”, while the company's other cards keep the global form.

**Label** Default: field type name

The field label the visitor sees, up to 120 characters. The built-in labels of the standard fields are translated into the visitor's language; a label you enter yourself, for standard and additional fields alike, is shown exactly as you entered it.

**Example:** a card that partners abroad also open gets the label “What are you interested in? / Was interessiert Sie?”, because the label of an additional field is not translated.

**Key** Default: polje, polje_2...

The internal name of the field: lowercase letters without diacritics, digits and underscores, up to 40 characters. For standard fields it cannot be changed. If you enter a key that the software uses for its own purposes (for example `consent`), the field gets a different key, and a duplicate key gets the suffix `_2`. Answers are linked to the label in Contacts through the key, so do not change it once the first answers have been collected.

**Example:** for the question “What are you interested in?”, enter the key `interest`; if you later change only the label, the old answers are shown under the new label.

**Placeholder** Default: empty

Gray helper text in an empty field, up to 120 characters; it disappears when the visitor starts typing. In a dropdown, it is the first, empty item of the list (without it, the list shows “Select an option”). Checkbox and Radio fields have no placeholder.

**Example:** in the “City” field, enter the placeholder “e.g. Denver”, so the visitor sees right away what is expected.

**Options (one per line)** Default: Opcija 1, Opcija 2 (Option 1, Option 2)

Only for Dropdown and Radio: the offered values, each on its own line. Duplicates are removed, and the server accepts only an answer that is exactly one of these values.

**Example:** for the question “Which service are you interested in?”, enter three lines: Website design, Online store, Maintenance.

**Required** Default: off (on for name and email)

Adds an asterisk to the field label, but for additional fields the requirement is not enforced: the visitor can submit the form without that answer. Only name, email and consent (when it is required) are always enforced. Turning the option off for name or email does not make them optional.

**Example:** mark the question “When should we call you?” as required so that it gets an asterisk, but still expect some contacts in Contacts to arrive without that answer.

**Where can you see the answers to additional fields?**

Only the Administrator sees the answers, in wp-admin: in QR vCard Pro → Contacts (a green block below the message), in the `Custom fields` column of the export from that screen (in the form “Label: value; …”, with a ticked checkbox shown as “Yes”) and in the event overview. They are not shown in Contacts on the portal, in the export from the portal, in Team contacts, in the email notification to the card owner or in the webhook message about a new contact. If the Card Manager or employees need the answers, the Administrator forwards the export to them.

**Watch out:** when any custom form is active, the standard phone, company and message fields, if they are in the form, are always tucked away behind the *+ More details (optional)* button, regardless of the *Optional fields* option. Additional fields are never tucked away. So create any question that matters to you as an additional field.

**Watch out:** the labels of additional fields in Contacts are taken from the card's current form. If you delete a field or change its key, the old answers are shown under the raw key. Plan the form before you start collecting contacts, and later change only the labels.

**Watch out:** saving the Lead Capture tab while the *Enable custom form (replaces the default fields on all cards)* switch is off deletes the saved global form. The same happens when you save the tab on a plan below Unlimited, where the switch is not shown. If your plan is temporarily lower and you want to keep the global form, do not save the Lead Capture tab until you are back on Unlimited.

**Note:** forms that are already saved are still shown on the cards when the plan drops below Unlimited, but they cannot be changed then. A Multi-line field accepts at most 255 characters in the browser; for longer answers, keep the standard *Message (optional)* field in the form, which accepts up to 1,000 characters.

REAL-WORLD EXAMPLE

A web design company gets plenty of contacts but cannot tell from them what each person is looking for. The administrator adds a Dropdown “Which service are you interested in?” (Website design, Online store, Maintenance) and a Radio “When should we call you?” (Morning, Afternoon) to the global form. For the card the company takes to an industry conference, the administrator creates a separate form with an additional Checkbox field, “Send me a case study”. After the conference, the administrator exports the contacts from QR vCard Pro → Contacts and sees at once in the `Custom fields` column what to offer to whom.

## 16. Contacts: overview, tags, notes and export

**Where:** QR vCard Pro → Contacts (*Received contacts* screen); on the portal: the *Contacts* button on the card tile in the *Cards* list (for employees, *My card*)

**Who:** all portal users, for their own cards; the Administrator and the Card Manager, for all cards; the wp-admin screen is opened by the Administrator

**Plan:** 5 Sites and higher

> Contacts arrive from cards, from the scanner and from campaign pages, and you need to know whom you have already called back and what you agreed on? They all flow into one place, where you search them, label them with tags, add notes and export them to CSV for a spreadsheet or a CRM.

Every contact ends up here, no matter where it came from: from the exchange window on the card (Lead Capture: contact exchange on the card), from the scanner (Paper business card scanner), from campaign pages (Pages /l/: link hub and lead magnet landing page) or through the API (REST API and API keys). Contacts have two views: a wp-admin screen for the administrator and a portal screen for all users. Without the 5 Sites plan, an upgrade message appears instead of the contacts (in wp-admin, *Contact Exchange is a 5 Sites+ feature*; on the portal, *Contacts CRM is not available on your tier*).

### Who sees which contacts?

| Place | Administrator | Card Manager | Employees and Team members |
|---|---|---|---|
| **QR vCard Pro → Contacts** | all contacts on the site | no access (works on the portal) | no access |
| **Portal: *Contacts* and *CSV export*** | contacts from all cards | contacts from all cards | only contacts from their own cards |
| **Portal: *Team contacts* (Unlimited)** | your cards and the cards of all active employees | the same | no access |
| **Tags and notes** | any contact | every contact they can see | contacts from their own cards |
| **Deletion** | any contact, in wp-admin and on the portal | any contact, on the portal | contacts from their own cards |

The portal shows only contacts from published cards. Contacts of a card that has been moved to the trash stay in the database and are visible in wp-admin; for a permanently deleted card, “(deleted)” is shown instead of its

name. Deleting a card does not delete its contacts.

### How do you open Contacts on the portal?

1. On the portal, open *Cards* (for employees, *My card*).
2. On the card tile, tap *Contacts*; the number on the button tells you how many contacts the card has. The *Contacts: [card name]* screen opens.
3. To see all contacts at once, tap *Reset* in the filter bar: the heading changes to *All contacts*. The ← *Back to Contacts* button in the scanner leads to the same screen.
4. A tap on a row opens the contact's details.

The portal menu has no separate item for Contacts; the way in is always through a card. Each row shows the initials, name, company, email, phone, the beginning of the message (up to 25 words), tags, the source label, the card and the date, with 20 contacts per page (← *Previous*, *Page X of Y*, *Next* →). The contact's details contain *Email*, *Phone*, *Company*, *Received via* (the card), *Date*, *GDPR consent* (✓ Yes or ✗ No) and *Message*.

### What does the Received contacts screen in wp-admin show?

The table shows 25 contacts per page, newest first, with the columns *Received* (date and time), *First name*, *Email* (a link for writing), *Phone* (a link for calling), *Company*, *Source*, *Card / Message* (the card name, the message and the answers to additional fields in a green block), *Tags / Notes* and *Delete*. Above the table is a count of the contacts for the selected filter.

### Options in wp-admin

**Card:** Default: All cards

Shows only the contacts of a single card; the list offers up to 100 published cards, by name. The choice applies immediately.

**Example:** before a meeting with a sales rep, select their card and within a minute you see everything they have collected.

**Source:** Default: All sources

Options: *Form (landing page)*, *Post-Save modal*, *Pre-Save banner*, *Gated* and *CSV import*. Contacts from the scanner and from /l/ pages carry the label *Form* here and have no separate choice; on the portal, the scanner is shown as *Scan*.

**Example:** select *Gated* to see how many contacts came from cards in trade fair mode.

**Search by name / email / company... and Search** Default: empty

Looks for the given text in the contact's name, email and company; the phone number is not searched here.

**Example:** enter the name of a client company and you get everyone from that company who has left you their contact.

**Download CSV**

Exports the contacts to CSV, taking into account only the card selection; source and search are not applied. The columns are described in the table below.

**Example:** once a month, export all contacts and import them into the sales spreadsheet, where the `Tags` column shows which event they came from.

**✏️ Add or Edit (Tags / Notes)**

Opens the *Tags (comma-separated)* and *Note…* fields directly in the table row, with the *Save* and *Cancel* buttons. The rules for tags and notes are the same as on the portal.

**Example:** after a call, enter the tag “called” and the note “Interested in maintenance, follow up in March”.

**Delete**

After the confirmation “Are you sure you want to delete this contact?”, it permanently deletes the contact and reports “Contact deleted.” Here, the Administrator can delete a contact from any card.

**Example:** a person sends you a request to delete their data; find them by searching for their email and delete the row.

### Options on the portal

**View: list and View: grid** Default: list

Two icons in the header change how the contacts are laid out: rows one below the other, or cards in a grid.

**Example:** on a tablet, choose the grid to see more contacts from the trade fair at once.

**Card (All cards)**

Narrows the view to one card and applies immediately; the field appears when there is more than one card to choose from.

**Example:** an employee with two cards, one in the local language and one in English, selects the English one and sees only the contacts of foreign partners.

**Source (All sources)** Default: All sources

Options: *Form*, *Post-Save*, *Banner*, *Gated*, *Import* and *Scan*. Contacts from /l/ pages are shown as *Form* and have no separate choice.

**Example:** select *Scan* and check whether all the paper business cards from yesterday's meeting have been entered.

**Search (Name, email, company, phone...), Apply and Reset**

Here, the search also covers the phone number. *Apply* applies all the filters, and *Reset* clears them and takes you to *All contacts*.

**Example:** a client calls you from an unknown number; enter the last few digits and find out who it is and which card they came from.

**CSV export**

Exports the contacts that match all the selected filters (card, source, search). The button appears when the list has at least one contact.

**Example:** filter by the *Gated* source and export only the contacts from the trade fair for a post-event campaign.

**📷 Scan**

Opens the paper business card scanner. It is visible only in the *All contacts* view, with no card selected; everything about it is in the Paper business card scanner chapter.

**Example:** when you get back from a meeting, tap 📷 *Scan* and enter the business card you were given.

**✏️ Edit tags and note**

In the contact's details, in the *Tags and notes* area, it opens the fields *Tags (comma-separated, e.g. VIP, fair2026)* and *Note about this contact...*, with the *Save* and *Cancel* buttons. A contact can have at most 10 tags of up to 40 characters each; a repeated tag is stored once. A note accepts up to 2,000 characters. There is no separate contact status (new, contacted), so use tags for that.

**Example:** introduce the tags “new”, “called” and “offer sent” and change them as the deal moves forward.

**Send email and Call**

They open the email program or start a phone call, respectively. They appear when the contact has an email address or a phone number, respectively.

**Example:** right after you return from the trade fair, tap *Call* in the contact's details and arrange a meeting while the person still remembers you.

**Delete**

After the confirmation “Are you sure you want to delete this contact? This cannot be undone.”, it permanently deletes the contact and returns you to the same filter. On the portal, the Administrator and the Card Manager can delete a contact from any card, and Employees and Team members only from their own cards.

**Example:** an employee deletes a test contact they sent to themselves while checking their card.

### How do Contacts differ from Team contacts?

**Contacts**

For all portal users, from the 5 Sites plan. The Administrator and the Card Manager see contacts from all cards, everyone else from their own. This is where you find the contact's details, tags, notes, deletion, calling and email, and the export has consent and country columns.

**Team contacts**

Only for the Administrator and the Card Manager, from the Unlimited plan. It covers your cards and the cards of all active employees, with the card owner's name next to each contact. The view is read-only, and the export has an `Owner` column. It is described in the Team analytics and team contacts chapter.

**CSV export: what does each file contain?**

All exports are CSV files with a comma as the separator and UTF-8 encoding that Excel reads correctly, up to 50,000 rows. A cell that begins with one of the characters `=`, `+`, `-` or `@` gets an apostrophe in front of it, so that a spreadsheet program does not run it as a formula; phone numbers in the form +1 555… stay intact.

| | QR vCard Pro → Contacts: *Download CSV* | Portal: *CSV export* | Portal: *Export CSV* (Team contacts) |
|---|---|---|---|
| **Filters** | card only | card, source, search | card, source, search |
| **Columns** | `Date received`, `Card`, `First name`, `Email`, `Phone`, `Company`, `Message`, `Consent` (Yes or No), `Country`, `Tags`, `Notes`, `Custom fields` | `Date received`, `Card`, `First name`, `Email`, `Phone`, `Company`, `Message`, `Source`, `Consent`, `Country` | `Date received`, `Card`, `Owner`, `First name`, `Email`, `Phone`, `Company`, `Message`, `Source` (internal value, see the table below) |
| **File name** | `qrvp-kontakti-YYYY-MM-DD.csv` | `qrvp-kontakti-YYYY-MM-DD.csv` | `qrvp-kontakti-tima-YYYY-MM-DD.csv` |
| **Plan** | 5 Sites and higher | 5 Sites and higher | Unlimited and higher |

Tags, notes and answers to additional fields exist only in the export from wp-admin.

**Contact source: how is it created and what is it called on each screen?**

| How the contact is created | QR vCard Pro → Contacts | Portal: Contacts | Team contacts | Value in the Team contacts export |
|---|---|---|---|---|
| **a form sent without a previous tap on the banner (for example via the *Save contact* button in the banner strategy)** | Form (filter *Form (landing page)*) | Form | Form | `direct_form` |
| **the *Save contact* button in the Post-Save strategy or the combination** | Post-Save | Post-Save | After saving | `post_save_modal` |
| **a tap on the banner** | Banner | Banner | Before saving | `pre_save_cta` |
| **the gated strategy** | Gated | Gated | Gated | `gated` |
| **REST API** | CSV import | Import | Import | `bulk_import` |
| **the paper business card scanner** | Form (no filter) | Scan | Scan | `scan` |
| **a form on a /l/ page** | Form (no filter) | Form (no filter) | Form | `landing` |

In the export from the portal, the `Source` column contains the labels shown on the screen, except for contacts from /l/ pages, where it says `landing`. The label *CSV import*, or *Import*, marks contacts entered through the API; there is no import of contacts from a CSV file.

For contacts from the form, consent shows whether the person ticked the consent checkbox. Contacts from the scanner always have ✗ No, and contacts entered through the API have the value that the program sent in the `consent_given` field.

**Watch out:** the note “(private: only you can see this)” next to tags and notes on the portal means that neither the visitor nor the person whose contact it is can see them. The Administrator and the Card Manager can see them and change them. Do not write anything in notes that management should not read.

**Note:** on the portal, the Administrator and the Card Manager can delete a contact from any card. Employees and Team members can delete only contacts from their own cards; for someone else's contact, they get the message “You do not have permission to delete this contact.”

**Watch out:** the WordPress tools for exporting and erasing personal data do not cover contacts. You handle a person's request to see or delete their data manually: find them by searching, then export or delete the row. Contacts are not deleted automatically either: the retention period on the Privacy and GDPR tab applies only to analytics data.

**Note:** the contact's details on the portal do not show the answers to additional fields or the country. You can see them in wp-admin and in the export from that screen.

REAL-WORLD EXAMPLE

A building materials distributor has six sales reps in the field. Each of them manages their own contacts on the portal, uses the tags “new”, “called” and “offer sent” to track how far they have got, and writes in the note what was agreed. On Friday, the sales manager opens *All contacts*, selects the *Scan* source and checks whether all the paper business cards from the construction sites have been entered, and then exports the contacts from all cards for the weekly meeting. Once a month, the administrator downloads the CSV from QR vCard Pro → Contacts, with tags and notes, and imports it into the CRM.

## 17. Paper business card scanner

**Where:** on the portal: *All contacts* → 📷 *Scan*; wp-admin has no scanner

**Who:** all portal users, each to their own cards; the OpenAI key is entered by the Administrator

**Plan:** 5 Sites and higher (5 Sites: 20 saved scans per user per month; Unlimited and Agency: no limit)

> You came back from a meeting with a stack of paper business cards and have no time to retype them? Take pictures of them with your phone: the scanner reads the details, you check them and save them as a contact with one tap.

The scanner sends a photo of the business card to OpenAI's image recognition service (the GPT-4o model), which extracts the name, company, position, email addresses, phone numbers, website and address from it. The result appears in a form that you review and correct before saving. The saved contact becomes an ordinary contact in Contacts, with the source *Scan*. The photo is not stored on the site.

The scanner uses the *OpenAI API Key* from the Lead Capture tab (Lead Capture: contact exchange on the card), the same one that automatic translation and the AI assistant use. Every photo is a separate request to OpenAI, billed to the account the key belongs to, even when you do not save the contact in the end.

### How do you scan a business card?

1. On the portal, open the Contacts of any card and tap *Reset* to get to *All contacts*; then tap 📷 *Scan*.
2. At the top of the *Scan business card* screen you see the quota status: “✨ Unlimited scans” or “Remaining: X / Y scans this month”.
3. In the *Save contact to card:* field, choose the card the contact will go to.
4. Tap *Click or take a photo* (*Capture a business card with your camera, or choose an image from your device*). The phone opens the rear camera or the gallery. JPG, PNG, WebP, HEIC and HEIF images up to 4 MB are accepted.
5. While the image is being processed, the screen shows “Scanning business card…” and “This usually takes 3-10 seconds.” This step does not use up the quota.
6. Review the filled-in form. A label above it rates the reading: “✓ High scan quality”, “ℹ Medium quality: check the fields before saving” or “⚠ Low confidence: the image is blurry or unclear. Consider taking another photo.” Correct whatever needs correcting.
7. Tap *Confirm and save contact*. Only then is one scan deducted from the quota. The *Contact saved!* screen shows the remaining quota and offers 📷 *Scan another* and *View contacts* →. The *Cancel* button takes you back to capturing without saving.

Below the image field are two tips from the screen itself: “💡 Best results: good lighting, the card fills the frame, text is sharp.” and “🔒 The image is sent to the OpenAI Vision API for text extraction. The image is not stored.”

**Options**

**Save contact to card:** Default: your newest card

The list offers only your own published cards; the Administrator and the Card Manager also scan only to their own cards. The selected card determines who gets the notification and which event the contact belongs to. If you have no cards, the scanner is replaced by “You have no cards yet” and the *+ Create your first card* button.

**Example:** a sales rep with a trade fair card and a regular card selects the trade fair card, which is assigned to an active event, so the contact gets the fair's name as a tag.

**First name, Last name**

Both are required (“First and last name are required.”); in Contacts they are stored together, as a single name.

**Example:** the business card only says “M. Davis”; enter the full name you heard at the meeting, so you can find the contact more easily.

**Company**

Stored in the contact's company field.

**Example:** the scanner reads only the company logo, as “ACME”; complete it with the full name: “ACME Manufacturing Ltd.”

**Position**

Stored in the contact's message, in the line “Position: …”.

**Example:** “Head of Procurement”; in Contacts you see right away that you are dealing with a decision maker.

**Email addresses and Add email**

At least one address is required (“At least one email address is required.”), and the server accepts only a valid one. The first valid address becomes the contact's email, and the others are stored in the message, in the line “Additional emails: …”.

**Example:** the business card has a personal address and a general company address; put the personal one first, because the *Send email* button in Contacts uses it.

**Phones and Add phone**

The first number becomes the contact's phone, and the others are stored in the message, in the line “Additional phones: …”.

**Example:** move the mobile number to the first position, so that the *Call* button in Contacts dials it and not the switchboard.

**Website and Add website**

Website addresses are stored in the contact's message, in the line “Web: …”.

**Example:** before a meeting, open the website from the contact's message and see what the company does.

**Address**

Stored in the contact's message, in the line “Address: …”.

**Example:** using the address from the message, a sales rep plans visits to customers in the same part of town.

**What happens to the saved contact?**

The contact arrives on the selected card with the source *Scan* (in wp-admin, with the label *Form*) and with consent ✗ No, because the person did not fill in the form themselves. The card owner receives the usual email notification. If you use them, webhooks receive the new contact event, and the Odoo connector sends the contact to Odoo. If the card is assigned to an active event, the contact gets the event name as a tag.

Automatic follow-up is never sent to contacts from the scanner: the person from the paper business card does not get an automatic thank-you message, neither the general one nor the card's own. If you want to get in touch with them, do it personally, with the *Send email* or *Call* button in Contacts.

**Quota and error messages**

The quota is counted per user and per calendar month (in Coordinated Universal Time, UTC), and it counts only saved contacts. On the 5 Sites plan it is 20 saved scans per user per month, and on the Unlimited and Agency plans there is no limit. When the quota is used up, the screen reports “You have used all scans this month” and “Used: X / Y scans. The counter resets on the 1st of next month.”, with the *Upgrade license* → button. On plans below 5 Sites, the scanner is replaced by “Card scanner is not available on your tier”. When the scanner cannot work for some other reason, the screen shows “Scanner is currently unavailable” and “Please try again later or contact support.”

If no key has been entered, the screen shows “🔑 OpenAI API key is not set”. Below it, the Administrator sees the *Open settings* button, which leads straight to the place where the key is entered: QR vCard Pro → Settings → Lead Capture, the *OpenAI API Key* field in the Multilingual support section. The Card Manager, employees and team members see, instead of the button, the message “The key is set by the site administrator. Contact them to enable the scanner.”

**Watch out:** the quota counts only saved contacts, but OpenAI bills every photo. If you photograph the same business card three times before you get a sharp image, you pay for three processing runs. Before taking the photo, make sure the lighting is good and position the card so that it fills the frame.

**Watch out:** the scanner does not check for duplicates. If you save the same business card twice, you will have two identical contacts in Contacts and use up two scans from the quota. Before scanning a larger number of business cards, search Contacts by name or email.

REAL-WORLD EXAMPLE

A sales rep from an IT company returns from a conference in another city with about thirty paper business cards. The company has the Unlimited plan, so there is no quota. On the train, on the last day of the conference, the rep opens the portal on their phone, selects the card assigned to the conference event and scans the business cards one by one, correcting only what the scanner marked as medium quality. By the time the rep reaches the office, all the contacts are in Contacts, with the conference name as a tag, because the event is still active that day. The rep then gets in touch with each of them personally, since contacts from the scanner do not receive automatic messages.

## 18. Analytics: what is measured and where to see it

**Where:** QR vCard Pro → Analytics (*QR Cards Analytics*); on the portal: *Statistics* on the card tile and *Card analytics* in the menu

**Who:** Employees and Team members, for their own cards; the Administrator and the Card Manager, for all cards; the wp-admin screen is opened by the Administrator

**Plan:** all plans; Advanced analytics, Lead Capture rate and the export from wp-admin: 5 Sites and higher

> Do you want to know how many people really open your card, what they tap on it and how many of them save your contact? Every opening and every important tap on the card is recorded, and you view the results by card, period, country, device and hour.

Recording works on all plans and needs no setup. In the reports, every opening of the card is called a “scan”, regardless of whether the visitor scanned the QR code, tapped an NFC card or opened a link from a message. With every recorded event, the software stores the card, the time according to the site's clock, the event type, the approximate location, the device type, the operating system and the browser (according to the privacy settings), the link to an active event from the Events chapter, and UTM data if the visitor came through a campaign link. The visitor's name is not recorded.

**What is recorded?**

| Event in the report | When it occurs |
|---|---|
| ***View*** | opening the card; it is not recorded when the card is opened by automated programs and by link previews in apps (WhatsApp, Slack, LinkedIn, Facebook, Twitter, Discord, website monitoring services) |
| ***Contact saved*** | a tap on *Save contact* when contact exchange is not enabled; *Skip* in the exchange window; every successful submission of the exchange form |
| ***Phone click*** | a tap on the phone number or on the *Call* button |
| ***Email click*** | a tap on the email address |
| ***Website click*** | a tap on the website entered in the card's contact details |
| ***Social media click*** | a tap on any item among the card's social networks and links (including Viber, Telegram and PayPal) and on the WhatsApp button |
| ***Map click*** | a tap on the *Map* button or on the address |

Taps on featured links, on the *Review* and *Share details* buttons, on Google Wallet and on the gallery are not recorded, and neither is opening the .vcf file's URL directly or downloading through the “Just download” link in the gated strategy. The same click repeated from the same address on the same card within 30 seconds is counted once.

Recording does not depend on the cookie consent banner: the banner (Retargeting pixels) stops only Google Analytics, Google Tag Manager and ad pixels, not the software's own analytics.

**How are the numbers calculated?**

- *Total scans* and *Today* count only views.
- *Unique* (in wp-admin, *Unique visitors*) is the number of different hashed IP addresses in the period, across all event types. With address anonymization, visitors from the same network count as one.
- The daily chart, the heat map, countries, cities, devices, operating systems and browsers count all events: views, clicks and contact saves. A visitor who opens the card and calls you is counted twice in the chart.
- *Conversion rate* is the number of *Contact saved* events divided by the number of views, times 100.
- *Contact saved* does not confirm that the contact was really added to the phone's contacts: it also occurs on *Skip* and on every submission of the exchange form.
- The “last N days” period is counted from midnight in Coordinated Universal Time (UTC), while event times follow the site's clock, so close to the turn of the day an event may end up in the neighboring day.

**What does Analytics in wp-admin show?**

The *QR Cards Analytics* screen shows one card and has no period selection: each block has its own fixed period. You can also reach the screen with the 📊 *Open analytics* button in the *Statistics* box when editing a card, and ✎ *Edit card* takes you back to editing. As long as the card has no views, the screen says “This card has no scans yet. Statistics will appear after the first scan.”

| Block | Period | What it measures |
|---|---|---|
| ***Total scans*, *Unique visitors*** | all time | views; different hashed addresses |
| ***Today*** | today | views |
| ***Daily average (30d)*** | 30 days | all events from the daily chart, divided by 30 |
| ***Conversion funnel (30 days)* (5 Sites)** | 30 days | *Card views* → *Saved contact*, with a percentage |
| **💡 *Smart insights*, 📈 *Last 7 days vs previous week*, 🧪 *Lead Capture A/B test*, 👥 *Cohort retention: weekly return of visitors* (5 Sites)** | 7 days, 90 days and 6 weeks | described in the part about advanced analytics |
| ***Top cards, 30 days*** | 30 days | the 10 cards with the most events; the columns *Card*, *Views* and, from 5 Sites, *Conversions* and *Rate* (green above 20%, orange above 10%) |
| ***Scans per day: last 30 days*** | 30 days | a line chart of all events |
| ***Countries*, *Top cities*** | all time | the 10 most frequent of each |
| ***Device type*, *Operating system*, *Browser*** | all time | distribution (up to 5, 6 and 6 items) |
| ***Activity by day and hour (last 7 days)*** | 7 days | a heat map of the day of the week and the hour |
| ***Latest scans*** | last 20 | *Date and time*, *Location*, *Device*, *OS*, *Browser*, for all event types |

The *Views* column in the *Top cards, 30 days* table shows only views, but the order of the cards is determined by the total number of events.

**What does a card's Statistics screen on the portal show?**

A card's Statistics are opened by its owner with the *Statistics* button on the tile, and by the Administrator and the Card Manager for other people's cards as well; everyone else gets the message “You do not have permission to view these statistics.” Before the first view, the screen shows “No scans yet” and “As soon as someone scans your QR code, the first scan will appear here within a few minutes.”

| Block | Period | What it measures |
|---|---|---|
| ***Total scans*, *Unique*** | selected | views; different hashed addresses |
| ***Today*** | today | views |
| ***Conversion rate* ("X of Y saved contact")** | selected | *Contact saved* divided by views, times 100 |
| ***Lead Capture rate* ("X of Y exchanged contacts") (5 Sites)** | always all time | all contacts of the card divided by all *Contact saved* events, times 100 |
| ***What do visitors do on your card?*** | selected | the number and percentage of each event type |
| ***Scans per day (last N days)*** | selected, at most 365 days | a line chart of all events |
| ***Countries*, *Top cities*, *Device type*, *OS*, *Browser*** | selected | as in wp-admin |
| ***Advanced analytics* (5 Sites)** | the funnel follows the selected period, the rest use fixed periods | described in the part about advanced analytics |
| ***Activity by day and hour (last 7 days)*** | 7 days | a heat map |
| ***Latest scans*** | last 20 | all event types |

**Advanced analytics (5 Sites and higher)**

On lower plans, these blocks are replaced by "Advanced analytics is a Pro feature", and in wp-admin by a blurred sample funnel marked PRO.

- **Conversion funnel:** card views compared with *Contact saved* events, with the rate in percent. In wp-admin always for 30 days, and on the portal for the selected period (*Conversion funnel (N days)* or *(all time)*).
- **Week comparison:** views, contact saves and the rate for the last 7 days compared with the 7 days before. In wp-admin they are called *Scans*, *Conversions* and *Conv. rate*, with "Last week: …" and the arrows ↑, ↓ or → (→ when the change is smaller than 1%); on the portal they are *Views*, *Saved contacts* and *Conversion rate*, with "previous: …". If the previous week had zero and the current one more than zero, the change is shown as 100%.
- ***Lead Capture A/B test*:** the share of contacts by source in the last 90 days (*Direct form*, *Post-save modal*, *Pre-save CTA*, *Gated (required)*, *Bulk import / API*, *Scan*, *Landing*). This is a distribution of contacts by source, not a real test: visitors are not split into groups. To really compare strategies, set them up on similar cards (with the per-card strategy) and compare the number of contacts with the number of views.
- ***Cohort retention*:** the last 6 weeks. Visitors are grouped by the week (starting on Monday) in which they first opened the card within that period, and the columns W+1 to W+6 show what percentage of the group came back after one, two or more weeks. A visitor is recognized by their hashed address.
- 💡 ***Smart insights*:** short messages based on fixed rules. When there were views in the last 7 days: a rise or fall in views of 20% or more, praise when the contact save rate is 10% or higher, and a suggestion to turn on Lead Capture when the rate is below 5% with more than 50 views. When the contacts in the last 90 days came from

more than one source, the most productive source is highlighted, and the heat map provides the most active day of the week. Without enough data, the block says “You don't have enough data for insights yet. Check back after a few scans.”

**Card analytics on the portal**

In the portal menu, the Administrator and the Card Manager have *Card analytics*: a ranking of up to 200 published cards of all owners, by the total number of views, with the header “X scans in total”. The *Ranking by scans* table has the columns *#*, *Card*, *Total*, *Today* and *Unique* (all for all time, except *Today*) and a *Statistics* button for each card. Other users get “You do not have access to this section”. Brief statistics also appear on the card tile on the portal (total and today) and in the *Statistics* box when editing a card in wp-admin (total scans, unique, today).

**Options**

**Choose a card:** Default: first card in the list · wp-admin only

Selects the card whose analytics are shown; the list contains up to 100 published cards, by name.

**Example:** the administrator selects the card of a new sales rep and sees in the heat map that the card is opened mostly in the evening, after working hours.

**Period:** Default: Last 30 days · portal only

Options: *Last 7 days*, *Last 30 days*, *Last 90 days*, *Last year* and *All time*. It changes all the Statistics blocks except *Today*, *Lead Capture rate*, the heat map, the latest scans and the fixed periods of advanced analytics. For *All time*, the daily chart shows the last 365 days. Period selection works on all plans.

**Example:** select *Last 7 days* after a trade fair and compare the number of views with the week before it.

**Download CSV (all activity)** Plan: 5 Sites and higher · wp-admin only

Exports all events of the selected card, for all time, up to 50,000 rows. The button is below the conversion funnel and appears from the 5 Sites plan.

**Example:** export a card's events for a whole year and build a monthly report for management in a spreadsheet.

**Download CSV** Plan: all plans · portal only

Exports the card's events for the period selected on the screen, up to 10,000 rows.

**Example:** an employee exports their views for the last 90 days and attaches them to a work report.

**Detailed statistics for card:** Default: Select a card · portal only, Card analytics

Opens the Statistics of the selected card without looking for it in the list.

**Example:** in the ranking, a Card Manager sees that one card has dropped sharply, selects it here to open it right away and checks where its visitors were coming from.

**Exporting events to CSV**

| | wp-admin: *Download CSV (all activity)* | Portal: *Download CSV* |
|---|---|---|
| **Period** | all time | the selected period |
| **Columns** | `Date`, `Action`, `Country code`, `Country`, `City`, `Region`, `Device type`, `OS`, `Browser` | `scanned at`, `action`, `country code`, `country name`, `city`, `region`, `device_type`, `os`, `browser` |
| **Maximum rows** | 50,000 | 10,000 |
| **File name** | `qrvp-analytics-[card name]-YYYY-MM-DD.csv` | `scans-[card address]-[number of days]d.csv`, for all time `-all.csv` |

The event type column contains internal values: `view` (view), `save_contact` (contact saved), `click_phone`, `click_email`, `click_web`, `click_social` and `click_map` (map click). No export contains the IP address, its hash or the browser's full User-Agent string.

**How do the privacy settings change analytics?**

The settings are described in the Privacy and GDPR chapter; this section covers only their effect on the numbers.

- *Log QR code scans* (on by default): when it is off, no event is recorded at all, neither views nor clicks nor saves. Statistics, the funnel, Team analytics, *Scans* in the ROI dashboard and the scan count in the Events report stay at zero, while contacts are still received.
- *Anonymize IP addresses (recommended)* (on by default): the address is shortened before hashing and before the location is determined, so *Unique* counts networks rather than individual devices.
- *Store SHA256+salt hash of IP (for the "unique" counter)* (on by default): when it is off, all unique visitor counters show 0, and the visitor return table stays without data.
- *Send IP addresses to ip-api.com to determine country/city* (off by default): without this option, country and city exist only when the site runs behind Cloudflare. When it is on, the site sends up to 100 addresses once an hour to the ip-api.com service, over an unencrypted connection, and stores the country, region and city. If the service does not respond, those events stay without a location and are not sent again.
- *Parse User-Agent (device, OS, browser)* (on by default): when it is off, the device, operating system and browser charts stay empty.
- *Scan retention* (365 days by default): events older than the set number of days are deleted once a day, so even *All time* reports cover only that period; 0 means keeping them with no time limit. Contacts are never deleted automatically.

> **Watch out:** on a site behind Cloudflare, the country is stored only as a two-letter code. The *Countries* list may then stay empty even though the country is known, and you can see the country code in the *Location* column of the *Latest scans* block.

**Watch out:** *Lead Capture rate* is always calculated for all time, regardless of the selected period. The numerator includes all contacts of the card, including those from the scanner, from /l/ pages and from the API, while the denominator includes only *Contact saved* events, so the value can go above 100%. To see how well the exchange on the card itself works, follow the contact source in Contacts.

**Note:** the conversion funnel and the export button in wp-admin are available from the 5 Sites plan, even though the message on the locked funnel block mentions Unlimited.

REAL-WORLD EXAMPLE

A downtown restaurant has a QR code with a card on every table. The owner opens Statistics on the portal and, in the heat map, which shows the last 7 days, sees that visitors open the card most often on Fridays and Saturdays after 8 p.m. In the *What do visitors do on your card?* block, for the last 30 days, the owner sees that a phone click is the most common action after a view. So on those days the owner puts more staff on the reservation phone and turns on the exchange banner on the card, with a message about group reservations. A month later, the owner compares the conversion rate and the number of contacts with the *Banner* source.

## 19. Team analytics and team contacts

**Where:** QR vCard Pro → Team analytics; on the portal: *Team analytics* and *Team contacts* in the menu

**Who:** Administrator and Card Manager **Plan:** Unlimited and higher

> You lead a team of sales reps and want to see whose card is working and whose is just sitting in a wallet? Team analytics puts all employees on one leaderboard, and Team contacts gathers all their contacts in one place, with the name of the card owner.

The team consists of the person viewing the report and all active employees of the company added on the Employees page (Employees), regardless of who added them. Deactivated employees are not included, and neither are members invited only through the Team page (Team and the Card Manager role). Only published cards are taken into account.

Employees and Team members do not see these screens: they get “You do not have access to this section” together with “Team analytics is only available to the account manager.” or “Team contacts are only available to the account manager.” Without the Unlimited plan, Team analytics shows the offer “Team analytics and leaderboard”, and Team contacts shows the message “Team contacts are not available on your tier”.

**What does Team analytics show?**

| Element | What it measures |
|---|---|
| ***Card views*** | the number of views on the team's published cards in the period |
| ***Saved contacts (vCard)* (on the portal, *Saved contacts*)** | the number of *Contact saved* events |
| ***Leads (form)*** | the number of contacts from all sources (form, scanner, /l/ pages, API), by date received |
| ***Active members / cards*** | two numbers: the members with at least one published card, and the total number of the team's published cards |
| ***Views by day*** | a bar chart of views per day, with the first and last date of the period |
| 🏆 ***Team leaderboard*** | one row per member: # (🥇 🥈 🥉 for the top three), *Team member* (with the *Manager* label for you), *Card* (number of cards), *Views*, *Saved*, *Leads* and *Rate* |
| ***Top cards in the team*** | the 8 cards with the most views, then saves: *Card*, *Owner*, *Views*, *Saved*, *Leads*, *Rate* |

*Rate* is the number of saves divided by the number of views, times 100, to one decimal place. In wp-admin, the leaderboard also shows the member's email. Without members, the screen says “No team members. Add employees to see the leaderboard.”, and without data in the period, “No data for the selected period yet.”

### Options in Team analytics

**Period** Default: 30 days

In wp-admin, *Last 7 days*, *Last 30 days* and *Last 90 days*, and on the portal, *7 days*, *30 days* and *90 days*. There are no other periods.

**Example:** at the monthly sales meeting, select 30 days, and after a one-week promotion, 7 days.

**Sorting the leaderboard (click on a column header)** Default: Views

A click on *Views*, *Saved*, *Leads* or *Rate* reorders the list by that column; for equal values, the number of views decides. Below the list it says: “Click a column header to change the sorting. "Saved" = the visitor saved the vCard; "Leads" = a completed exchange form; "Rate" = saved / views.”

**Example:** sort by *Leads* to see who brings in the most contacts, and then by *Rate* to see whose card is best at turning views into saves.

**Card name in the Top cards in the team table**

A click on the card name opens the card editor in wp-admin, and the card's Statistics on the portal.

**Example:** open the Statistics of the strongest card, see which cities its visitors come from and at what hours, and pass that experience on to the rest of the team.

### What do Team contacts show?

The screen shows contacts from the team's cards, 20 per page (*Page X of Y*). Each row has the initials, name, company, email and phone as links, the source, the card with the owner's name and the date received. The view is

read-only: there are no details, tags, notes or deletion. For those, use Contacts (Contacts: overview, tags, notes and export). The source names here are *Form*, *After saving*, *Before saving*, *Gated*, *Import* and *Scan*, which correspond to the labels Form, Post-Save, Banner, Gated, Import and Scan in Contacts.

**Options in Team contacts**

**Card (All team cards)**

Narrows the view to one team card; the items in the list have the form “Card name: Owner”.

**Example:** before a conversation with an employee, select their card and see how many contacts they brought in and where from.

**Source (All sources)**

Shows only the contacts from one source.

**Example:** select *Scan* to see who on the team regularly enters paper business cards and who leaves them in a drawer.

**Search (Name, email, company, phone...), Apply and Clear**

Looks for the text in the name, email, company and phone. *Apply* applies the filters, and *Clear* removes them.

**Example:** a customer says they have already talked to someone from your company; enter the name of their company and see which employee they left their contact with.

**Export CSV**

Exports the contacts that match the selected filters, with an `Owner` column; the `Source` column contains the internal source value (for example `post_save_modal`). The columns and values are described in the Contacts: overview, tags, notes and export chapter.

**Example:** export the team's contacts for the quarter and group them by the `Owner` column in a spreadsheet to calculate bonuses.

**Watch out:** the *Saved* column does not mean that the visitor really added the contact to their phone: it also counts *Skip* in the exchange window and every successful form submission. The *Leads* column counts contacts from all sources, including the scanner and the API, even though the note below the list says “a completed exchange form”. An employee who scans a lot will therefore have a high number in the *Leads* column even without a single exchange on the card.

REAL-WORLD EXAMPLE

A company that sells medical equipment has eight sales reps. Every Monday, the Card Manager opens Team analytics for 7 days and sorts the leaderboard by the *Leads* column. The manager notices that one of the reps has few views but the highest rate, and passes her way of presenting the card to customers on to the others. In Team contacts, the manager filters by the *Gated* source and exports the contacts from last week's professional conference, with the owner's name next to each one, so that everyone gets their own contacts to follow up on.

## 20. Events

**Where:** QR vCard Pro → Events (creating and editing); on the portal: *Events* (viewing results only)

**Who:** events are created and changed by the Administrator; the results on the portal are visible to the Administrator and the Card Manager

**Plan:** Unlimited and higher

> You are going to a trade fair and want to know afterwards exactly how many scans and contacts your days at the booth brought in? Create an event, assign cards to it, and everything that happens while it runs gets the name of the fair as a label.

An event is a trade fair, conference or campaign with a name, an optional duration and a status. While the event is active, every view, click and contact save on the assigned cards is linked to it, and every new contact gets the event name as a tag. You view the results in the event overview in wp-admin and in the report on the portal. Without the Unlimited plan, the screen shows “Events + auto-tagging: Unlimited tier”.

### How do you create an event?

1. Open QR vCard Pro → Events and click *New event*.
2. Enter the name, location and duration, and choose a color and a status.
3. In the *Assigned cards* area, check the cards that will be used at the event. Without this step, nothing gets tagged.
4. Click *Save event*; the message “✓ Event saved.” appears.

#### When are scans and contacts linked to an event?

With every view, click and contact save on a card, as well as with every new contact, the software checks three conditions:

1. the card is assigned to the event;
2. the event has the *Active* status;
3. today's date, according to the site's time, is between *From* and *To*, including those days.

If all three are met, the view, click or contact save is linked to the event, and a new contact gets both the link to the event and the event name among its tags. The same applies to contacts from the scanner and from the other sources.

#### Options

**Event name *** Required · up to 160 characters

The name of the event in lists and reports; the same text is added to contacts as a tag. Without a name, saving is rejected with the message “Event name is required.”

**Example:** “Tech Fair 2026”; with the year in the name, tags from different years do not get mixed up.

**Location** Default: empty · up to 190 characters

Only for display in the list and in the report; it does not affect tagging.

**Example:** “Exhibition Center, Hall 3, Booth 12”, so that colleagues who were not at the fair also know where the contacts were collected.

**Duration: From, To** Default: empty

Tagging works only while today's date is within the period, including the first and the last day. An empty field means there is no limit on that side; below the fields it says “Auto-tagging works only while today falls within this period. Leave empty for an event with no time limit.”

**Example:** for a fair from May 12 to 15, enter those dates, and you do not have to change anything on the cards before or after the fair.

**Color** Default: blue (#2271b1)

A colored dot next to the event name in the lists, to make events easier to tell apart.

**Example:** trade fairs in green, conferences in orange.

**Status: Active, Archived** Default: Active

An archived event is no longer used for tagging, while the data already collected remains (“An archived event is not used for auto-tagging (historical data remains).”).

**Example:** stop a campaign that has no end date by archiving it when the promotion is over.

**Assigned cards** Default: none

A list of up to 500 cards (published, drafts, pending and private), in the form “name · author”. Checked cards are linked to the event; when you uncheck a card, it is detached from the event.

**Example:** check the cards of the five people staffing the booth, and leave out the card of the director, who is at the fair for only one day.

**Where can you see the results?**

**In wp-admin**, the event list has the columns *Name*, *Location*, *Duration*, *Status* (*Archived*, *Active now* or *Active*) and *Actions* (*Leads*, *Edit*, *Delete*). *Leads* opens the event overview: a colored heading, a row with the location, the

duration and the label *Active now* or *Not active*, the tiles *Card*, *Scans* and *Leads*, and the *Leads from the event* table (*First name*, *Email*, *Phone*, *Company* with the answers to additional fields, *Received*), up to the 200 newest. The *Edit event* and ← *All events* buttons take you back.

**On the portal**, the report has the columns *Event*, *Period*, *Status*, *Scans* and *Leads*, and a *Details* button. The *Status* column says “active” while the event is running, and otherwise shows the internal value `active` or `archived`. The details show the location, the period, the number of scans, contacts and cards, the *Assigned cards* list and the *Leads from the event* table (*First name*, *Contact*, *Company*, *Card*, *Date*), up to 200 contacts. The portal does not change events; there, the Card Manager also sees all the site's events and contacts, not just those of their own team.

The numbers mean the following: *Scans* are all views, clicks and contact saves linked to the event, not just views; *Leads* are the contacts linked to the event; *Card* is the number of cards currently assigned.

**Watch out:** tagging is not retroactive. Scans and contacts that arrived before you created the event or assigned the card to it stay without an event. Create the event and assign the cards before the fair begins.

**Watch out:** a card can belong to only one event. If you assign it to another event, the previous assignment is silently replaced. If you enter a *To* date that is earlier than the *From* date, the event never becomes active, so check the order of the dates.

**Watch out:** renaming an event does not change the tag on contacts already collected. After an event is deleted (“Delete this event? Tags on existing leads remain.”), the tag stays on the contacts, but the reports are gone. If *Log QR code scans* is off (Privacy and GDPR), *Scans* is always 0.

**Note:** there is no export per event. Export the contacts from QR vCard Pro → Contacts, where the `Tags` column contains the event name, and filter them in a spreadsheet program.

REAL-WORLD EXAMPLE

An IT company exhibits at a technology trade fair from May 12 to 15. A week earlier, the administrator creates the event “Tech Fair 2026”, enters the dates, assigns the cards of the four people working the booth and turns on the Gated strategy on those cards. During the fair, the Card Manager checks the number of contacts every evening on the portal, in the *Events* report. After the fair, the administrator exports the contacts, filters them by the tag “Tech Fair 2026” and sends them to the team that prepares offers, and uses the *Scans* and *Leads* tiles in a report on whether the booth paid off.

## 21. ROI dashboard

**Where:** QR vCard Pro → ROI dashboard (the *View* and *Assumptions* tabs); on the portal: *ROI dashboard* (the assumptions are a section below the overview)

**Who:** Administrator (overview and assumptions); Card Manager (overview on the portal) **Plan:** all plans

> You need to show management whether the digital cards pay off? Using the number of scans and contacts and your assumptions about deal value, the ROI dashboard calculates estimated opportunities, pipeline, revenue and return on investment.

The dashboard does not require any particular plan, but contacts from cards are collected through contact exchange, which works from the 5 Sites plan. The numbers cover the whole site, all cards of all users, so the Card Manager also sees the results of the whole company, not just of their own team. Everything except scans and contacts is an estimate, only as accurate as your assumptions.

**What is shown and how is it calculated?**

At the top, you choose the period. The funnel below has three steps, and the width of each bar is proportional to the largest value (at least 4%):

- *Scans*: the number of views of all cards in the period.
- *Contacts (leads)*: all contacts received in the period, from all sources; next to the number it says “X% of scans”, that is, contacts divided by scans, times 100.
- *Estimated opportunities*: contacts times *Lead → opportunity rate (%)*, divided by 100 and rounded (next to the number, “N% leads”). If the Odoo connector is enabled and at least one contact was successfully sent to Odoo in the period, the step is called *Opportunities in Odoo CRM* and shows the number of contacts sent (“sent to CRM”).

Below the funnel are three cards with amounts:

- *Estimated pipeline*: opportunities times *Average deal value* (below it, “N opportunities × amount”).
- *Estimated revenue*: pipeline times *Opportunity close rate (%)*, divided by 100 (below it, “at a close rate of X%”).
- *Return on investment (ROI)*: first, the cost for the selected period is calculated as the annual price times the number of days in the period, divided by 365. ROI is then revenue minus that cost, divided by the cost, times 100. It is shown as +X% on a green card or -X% on a red card. While the annual price is 0, a dash and the message “enter the annual price under Assumptions” appear instead of a number.

Amounts are rounded to whole numbers and shown with the currency symbol in front of the number (for example € 6,000), and percentages are rounded to whole percents. While the average deal value is 0, the text above the funnel reads “For accurate pipeline and revenue estimates, enter your average deal value under "Assumptions".” (the administrator also sees the *Set assumptions* → link). The note at the bottom reads “All figures are estimates based on your assumptions. Enable the Odoo connector to make "Opportunities" real (contacts sent to the CRM).” or, when Odoo is enabled, “Opportunities are real: the contacts sent to your Odoo CRM are counted. Pipeline and revenue are estimates based on your assumptions.”

**Calculation example**

Assumptions: *Average deal value* 500, *Lead → opportunity rate (%)* 25, *Opportunity close rate (%)* 20, *Annual software/license price* 730, currency €. The selected period is *Last 90 days*, in which the cards had 600 views and 48 contacts.

| Item | Calculation | Display |
|---|---|---|
| ***Scans*** | views in 90 days | 600 |
| ***Contacts (leads)*** | 48 / 600 × 100 = 8 | 48, “8% of scans” |
| ***Estimated opportunities*** | 48 × 25 / 100 = 12 | 12, “25% leads” |
| ***Estimated pipeline*** | 12 × 500 = 6,000 | € 6,000 |
| ***Estimated revenue*** | 6,000 × 20 / 100 = 1,200 | € 1,200 |
| **cost for 90 days** | 730 × 90 / 365 = 180 | (used in ROI) |
| ***Return on investment (ROI)*** | (1,200 minus 180) / 180 × 100 = 566.7 | +567% |

For the same revenue over a 30-day period, the cost would be 730 × 30 / 365 = 60, because the annual price is always divided in proportion to the number of days in the selected period. For *All time*, the number of days is counted from the first recorded scan or contact until today.

### Options

Only the Administrator changes the assumptions; on the portal, other users see “Only the account administrator can change the assumptions (deal value, rates, cost).” instead of the form. Changes are saved with the *Save assumptions* button, followed by the message “Assumptions saved.”

**Period** Default: Last 90 days

Options: *Last 30 days*, *Last 90 days*, *Last 365 days* and *All time*. The period is counted backward from the moment the screen is opened, and it changes all the numbers on the page.

**Example:** for a quarterly report to management, select *Last 90 days*, and for the annual decision on renewing the license, *Last 365 days*.

**Currency (symbol)** Default: €

A currency symbol of up to 6 characters, used only for displaying amounts (“E.g. €, RSD, $. Used only for displaying amounts.”). Amounts are not converted; an empty field reverts to €.

**Example:** a company that does business in US dollars enters $ and enters all the values in the assumptions in dollars.

**Average deal value** Default: 0

How much one closed deal is worth on average (“The value of one closed deal (average). Without it, the pipeline is 0.”). The number of opportunities is multiplied by it to get the pipeline.

**Example:** a real estate agency enters the average commission per apartment sold, not the price of the apartment.

**Lead → opportunity rate (%)** Default: 100

The percentage of contacts that become a real business opportunity, a whole number from 0 to 100. It is not used when the opportunities are real ones, from Odoo.

**Example:** if, on average, two out of every ten contacts from the cards ask for an offer, enter 20.

**Opportunity close rate (%)** Default: 20

The percentage of opportunities that turn into a deal, a whole number from 0 to 100. The pipeline is multiplied by it to get the estimated revenue.

**Example:** if, on average, three out of ten offers you send are accepted, enter 30.

**Annual software/license price** Default: 0

The annual cost that the revenue is compared with. For the selected period, the dashboard takes a proportional share: the annual price times the number of days in the period, divided by 365. If you leave it at 0, ROI is not calculated (“Leave 0 if you don't want an ROI estimate.”).

**Example:** enter the annual license price together with the annual cost of printing NFC cards, if you also want the results of the cards to justify that cost.

**Watch out:** the default *Lead → opportunity rate (%)* is 100, so every contact, including those from the scanner and the API, counts as an opportunity. Until you enter a realistic percentage, the pipeline and the revenue are inflated.

**Watch out:** when Odoo is enabled but no contact was successfully sent in the selected period, the funnel shows *Estimated opportunities*, even though the note at the bottom says the opportunities are real. Go by the name of the step. All contacts successfully sent to Odoo count as real opportunities, even when the connector records them as partners rather than as CRM opportunities (Odoo ERP).

REAL-WORLD EXAMPLE

A law office with five attorneys has been using the cards for a year and has to decide on renewal. In the assumptions, the administrator enters the average value of a case, a rate of 15% for contacts that turn into a request for representation, a close rate of 40% and the annual license cost. For *Last 365 days*, the dashboard shows the estimated revenue and the return on investment, and the Card Manager uses the same overview on the portal at the partners' meeting. Since everything except scans and contacts is an estimate, after six months the office compares the assumed close rate with the actual number of accepted cases and corrects it.

# 22. Employees

**Where:** QR vCard Pro → Employees; on the portal: *Employees*

**Who:** Administrator and Card Manager (only the Administrator can open the page in wp-admin)

**Plan:** Unlimited and higher; import from CSV: Agency only

> Need business cards for your entire sales team, without making each person go through forms and settings? Add each employee with a single form: the account, a filled-in card and the first sign-in link are all created at the same moment.

An employee is a person for whom you create the account and the card. They fill in nothing: they receive a ready-made card with the details you entered and a one-time link that takes them into the portal for the first time, where they set their own password right away. After that, they work on the portal just like a team member: they edit their cards and use the QR code, email signature, virtual background and contacts, and they can also create new cards unless you restrict this with the setting described at the end of this chapter.

The Administrator and the Card Manager see all employees on the site, regardless of who added them. Deactivated employees are not shown on the list. Without the Unlimited plan, the page shows the message "Employee management is available from the Unlimited tier." (on the portal, "Employees are not available on your tier") and the *Upgrade license* → button.

**Employees → Add employee**
You enter the details, the card is created immediately, and the person receives a one-time link and then sets a password. You keep track of the person on the employee list and can see whether they have activated the account.

**Team → Invite** (Agency only)
The person receives a link for setting a password and creates their own cards; none is created in advance. They do not appear on the employee list. Described in the chapter Team and the Card Manager role.

### How do you add an employee?

1. Open QR vCard Pro → Employees, or *Employees* on the portal, and find the *Add employee* section.
2. Enter *First name* and *Email* (required fields) and, if needed, *Last name*, *Phone*, *Position* and *Department*.
3. Leave sending the link by email turned on if the employee reads email on their phone. If you are going to send them the link in a message, you can turn the email off.
4. Click ✓ *Add employee and send link*.
5. In the box that appears, copy the link or the ready-made message text right away. The box is shown only once: after you refresh the page, it is gone.

### What do you enter in the form?

**First name** Required

The first name becomes the first name of the account and the name on the card; together with the last name, it also becomes the card title (“First name Last name”) and the name in the greeting on the portal. The software also builds the username from the first and last name, but the employee does not need to remember it: they sign in with their email.

**Example:** for a sales representative you enter “Mark”, and the welcome email greets him with “Welcome, Mark!”

**Last name** Default: empty

It is saved to the account and to the card and becomes part of the card title, after the first name.

**Example:** “Davis” with the first name “Mark” produces the card “Mark Davis”, which is also the name you find it under on the card list.

**Email** Required

The account address: the welcome email is sent to it, the employee signs in with it later, and it is added to the card as the first, business email. An invalid address is rejected with the message “The email address is not valid.” What happens when an account with that address already exists is described in the note below.

**Example:** you enter the work address mark.davis@company.com, because that is the address customers see on the card and the one Mark signs in with.

**Phone** Default: empty

It is added to the card as the first number, labeled as a mobile phone, and is stored with the employee's details.

**Example:** you enter “+1 555 123 4567”, in the international format the field suggests, so that the call button on the card also works for people calling from abroad.

**Position** Default: empty

It goes into the position field on the card and is shown below the name. It is also visible on the employee list.

**Example:** “Sales Representative, Northern Region” tells a customer right away who they are talking to.

**Department** Default: empty

It serves your records only: it is shown on the employee list, below the name. It is not carried over to the card; if you want visitors to see it as well, enter it on the card in the *Department (optional)* field.

**Example:** you enter “Sales North” and “Sales South”, so on a list of some thirty people you can see at a glance who belongs to which team.

**Send welcome email** Default: on

In wp-admin the checkbox reads *Yes, send the magic link to the employee's email right away*, and on the portal *Send the magic link to the employee's email right away*. On: the employee immediately receives the welcome email with the button for the first sign-in. Off: the account, the card and the link are created in the same way, but no email goes out, so you send the link yourself from the box that appears after the employee is added.

**Example:** a warehouse worker reads work email only on the office computer; you turn the email off and send him the text with the link over Viber, so he can open it on his phone.

**When the email already exists on the site:** the Administrator can add such an account as an employee, unless it is the account of an administrator, editor, author, contributor or Card Manager. The account then gets portal access, the first name, last name, phone, position and department are updated, and if the person already has a published card, only the fields that were empty are filled in on it. The Card Manager can do this only for an account that already has portal access as an employee or team member, or for a deactivated employee they added themselves. In all other cases the form reports “A user with this email address already exists and cannot be added as an employee.”

**What exactly is created when you click Add?**

- **An account** with portal access and a random password that nobody knows. The employee sets their own password at the first sign-in.
- **A card**, published immediately, titled “First name Last name” and owned by the employee. The first name, last name, position, email, phone and company are filled in. The company is taken from your most recently published card; if you have none, the site name from WordPress Settings → General (Site Title) is used.
- **A link to you.** The employee is linked to the person who added them: that person's name appears in the welcome email and at the end of the message text, and replies to the welcome email go to that person.
- **A first sign-in link**, single-use and valid for 30 days. When the employee opens it, they are signed in and the portal asks them to set a password.
- **A welcome email**, if you left sending turned on.

**Watch out:** before you add your first employees, create your own card with the correct company name. Otherwise every employee gets the site name as the company, and you have to correct it on each card separately.

**What does the employee receive by email?**

The subject line is “Your digital business card from {company} is ready”, where the company is the same as on the card. The message says that you have created a digital business card with a QR code for them, and the main button is 📱 *SET UP MY CARD*. Below the button there is a note that the link works only once, that a password is set after the first opening and at which address they sign in later, followed by short instructions under “How to use it:”: open the email on the phone, tap the button and follow the instructions for adding the icon to the home screen. The message is sent through your site's email, and the employee's reply comes to you.

**How do you send the link in a message?**

Right after the employee is added, a box appears with the link and a ready-made message text. In wp-admin these are 📋 *Magic link (to copy and paste):* with the 📋 *Copy link* button and 📱 *SMS message (to send via*

*WhatsApp/Viber/SMS):* with the 📋 *Copy SMS* button. On the portal they are *Magic link (one-time, expires in 30 days):* and *Text for SMS / message:*, each with a *Copy* button. The prepared text reads “Hi {first name}! Your digital business card is ready. Open it on your phone: {link}”, followed by your first name on a new line. Copy it and paste it into an SMS, Viber or WhatsApp chat with the employee; the software itself does not send text messages.

The same box also shows whether the email went out: “📧 The welcome email was sent automatically to the employee's email address.” or “⚠️ The email was NOT sent (SMTP may not be configured). Use the links below.” On the portal, the corresponding messages are “✉ The welcome email with the magic link was sent to the employee's email address.” and “The email was not sent: share the magic link manually (below).”

> **Watch out:** the link works only once and is used up as soon as it is opened, so do not open it to try it out. If the message that the email was not sent keeps appearing, your site cannot send email: this is usually solved by setting up an SMTP server, either with your hosting provider or with a WordPress plugin, and until then you share the links in messages. A check mark in the *Welcome* column means that the site handed the message over for sending, not that it arrived; if the employee does not see it, ask them to check their spam folder.

**What does the employee list show?**

In wp-admin the list is called *Employee list*, with the number of employees in parentheses, and on the portal *Employee list*, with a counter in the header.

| Column | Where | What it shows |
|---|---|---|
| ***First name / Employees*** | wp-admin / portal | The employee's name; below it is the department (on the portal, “position · department”). |
| ***Email*** | both | The account address. |
| ***Position*** | wp-admin | The position, or a dash if none has been entered. |
| ***Welcome*** | wp-admin | ✓ if the welcome email was handed over for sending (you see the time it was sent when you hover over the check mark), ✗ if it was not. |
| ***PWA*** | wp-admin | ✓ once the employee has opened the first sign-in link or closed the intro on the card, ⏳ until they do. It does not show whether the icon was actually added to the phone. |
| ***Link status / Link status*** | wp-admin / portal | *active*: an unused link exists (in wp-admin, with “not clicked” and “expires in N days”). *activated* (portal only): the employee has already signed in. *none*: there is no valid link; in wp-admin, with “click Resend”. |
| ***Scans / Scans (30d)*** | wp-admin / portal | The number of views of the employee's first published card in the last 30 days. In wp-admin, below the number there is also “N contacts”: how many times visitors saved the employee's contact to their phone. These are not contacts that visitors left for the employee. |
| ***Actions*** | both | The buttons described below. |

> **Note:** in wp-admin, an employee who has already signed in to the portal has the status *none* (“click Resend”), because their link is no longer valid. This does not mean anything is wrong: the *PWA* column then shows a check mark, and on the portal the same employee has the status *activated*.

**What do the buttons in the Actions column do?**

The actions are icons; you see the name of each one when you hover over it. The Administrator and the Card Manager can use them for all employees.

**🔄 Send a new magic link (invalidates the old one)** on the portal: Send a new magic link

Creates a new sign-in link valid for 30 days and cancels the previous unused link, so only the newest one ever works. The welcome email is sent again (there is no choice here), and the new link and message text are shown once above the list. The employee's card and details do not change. An employee who opens the new link enters the portal and immediately gets the screen for setting a password, which also makes this the fastest way to restore access for someone who has forgotten their password.

**Example:** an employee's link expired while he was on vacation; you click 🔄 and send him the new text over Viber.

**🚫 Revoke active link** on the portal: Revoke magic link · visible only while an active link exists

After confirmation ("Revoke the active link? The employee will no longer be able to use that link. You can generate a new one later."), it cancels all sign-in links of that employee. The account, password and card remain, so an employee who has already set a password continues to sign in normally. Message: "Magic link revoked. The employee can no longer use that link."

**Example:** you sent the text with the link to the wrong Viber chat by mistake; you revoke the link and send a new one to the right person.

**📄 Edit card** on the portal: ✏️ Edit card

Opens the employee's first (oldest) published card for editing: in wp-admin the card edit screen, on the portal the card form. You find the employee's other cards on the card list.

**Example:** an employee got a new phone number; you correct it on the card, and the QR code on business cards that have already been printed still leads to the same card, now with the new number.

**✗ Deactivate (keeps the account and card)**

After confirmation ("Deactivate this employee? Their card stays active, but they will no longer have access."), the employee loses access to the portal: they are signed out on all devices, their sign-in links are canceled and they disappear from the list. The account remains in WordPress, without portal access. The card stays published and publicly available, and scans and contacts are kept. Message: "Employee deactivated."

You bring an employee back by adding them again with the same email. The Administrator can always do this; the Card Manager only if they added that employee themselves. There is no separate list of deactivated employees.

**Example:** a seasonal salesperson at a market stall has finished the season; you deactivate him, and next spring you add him again with the same email and he receives a new link for the same card.

**🗑 Delete employee (permanently: account, card and data)** on the portal: Delete employee (permanently)

After a confirmation that warns that the deletion cannot be undone, the employee's account is deleted, together with all their cards in every status (permanently, not moved to the Trash) and all scans and contacts from those cards. Other content they uploaded, such as images, is transferred to your account. Printed QR codes and NFC stickers for those cards then lead to a page that does not exist. Message: “Employee permanently deleted (account, card and data).” Both the Administrator and the Card Manager can run a permanent deletion, for any employee.

**Example:** an employee has left the company and you agreed that their data will not be kept; you first export the contacts from their card to CSV, then delete the employee.

**✗ Deactivate**
The person can no longer enter the portal. The card keeps working, QR codes and NFC stickers still open it, and contacts and statistics remain. It is undone by adding the person again.

**🗑 Delete**
The account, all cards, scans and contacts are gone. The QR codes of those cards lead to a page that does not exist. It cannot be undone.

**Watch out:** deactivation does not take the card off the internet. If you do not want a former employee's card to remain public, delete it from the card list after deactivation (see Card list, statuses, deletion and limits) or delete the employee permanently. Always deactivate employees here, not on the Team page: deactivation in Team does not remove the person from the employee list.

### How do you import employees from a CSV file?

The import is in the 📂 *Bulk import from CSV* box on the same page and works only with the Agency plan. Without it, the box carries the AGENCY badge and the message “Bulk import of 50+ employees at once is available on the Agency tier.” Each row of the file goes through the same process as the form: an account, a card and a link are created, and a welcome email is always sent.

1. Prepare the file. The first row is the header with the column names, and values are separated by commas only. The required columns are `first_name` and `email`, and you can add `last_name`, `phone`, `position` and `department`. Other columns are ignored, and column names are not case-sensitive.
2. Choose the file in the *Upload a CSV file:* field (on the portal, *CSV file*) or paste the content into the *Paste CSV content:* field (on the portal, *Paste CSV content*). If you fill in both, the pasted text is used.
3. Click *Import all and send welcome emails*.
4. Read the report: “📂 Bulk import complete”, “N new employees created”, “N existing updated” and “N errors”, with a list of the rows that failed and the reason for each (for example, “Row 4 (anna@company): The email address is not valid.”).

Example file:

```
first_name,last_name,email,phone,position,department
Anna,Brooks,anna.brooks@company.com,+15551112233,Sales Representative,Sales South
Nick,Turner,nick.turner@company.com,+15552223344,Service Technician,Field
```

Other column names are recognized too: `firstname` and `lastname`, `mail` for email, `tel` or `mobile` for phone, `role` or `job_title` for position, and `team` or `dept` for department. The file must have at least one data row, otherwise you get the message “The CSV is empty or contains only the header.” A row with an address that already exists updates that employee if this is allowed, under the same rules as the form; otherwise it is reported as an error for that row.

> **Watch out:** the report does not show the links, so employees receive their links by email only; for anyone whose email does not arrive, send a new link with the 🔄 button. Excel with regional settings that use the comma as the decimal separator, as in many European countries, often saves CSV files with semicolons instead of commas, and such a file cannot be imported. If you get the message “The CSV must have these columns: first_name” even though the column exists, the file has a hidden encoding marker at the very beginning (Excel adds one, for example, when you save the file as “CSV UTF-8”): open the file in a plain text editor, copy all the text and paste it into the *Paste CSV content:* field. The import is processed in a single step, with one email per row; how many rows the server can process at once depends on its configuration, so split a longer list into several smaller files.

**What are Top 3 employees and Needs attention?**

In wp-admin, below the list, two boxes appear when you have the Unlimited plan and more than one employee. 🏆 *Top 3 employees (30 days)* shows the three employees whose cards had the most views in the last 30 days. ⚠️ *Needs attention* shows up to three employees with the fewest views (those with more than 10 are skipped), with the message “Has not activated the card: resend the email.” or “Only N scans in 30 days.” These boxes do not exist on the portal. The Needs attention box makes a practical list for the weekly meeting: whoever has not activated their card gets a new link, and whoever has it but does not share it gets a short reminder of where to use it.

**How do you limit the number of cards per person?**

At the bottom of the Employees and Team pages, in wp-admin and on the portal, there is a *Maximum cards per person* box. It is a single setting: you change it in any of those four places and it applies everywhere. Both the Administrator and the Card Manager can change it. The box is visible only on an unlocked page, meaning from the Unlimited plan on the Employees page and with Agency on the Team page.

**Maximum cards per person** Default: 0 (no limit) · from 0 to 100

How many cards an employee or a team member may have. The Administrator and the Card Manager are not limited. All of the person's cards count except those in the Trash, including unfinished drafts and the card the software created when the employee was added. When the person reaches that number, the *New vCard* button and the *New card* shortcut in the quick actions toolbar disappear from the portal, the message “You have reached the allowed number of cards (N). Contact the administrator for a new card.” appears in their place, and the software refuses a new card both through Quick Start and by any other route. Existing cards can still be edited normally, and lowering the number neither deletes nor hides cards the person already has. Enter the number and click *Save*; the confirmation is “Settings saved.”

> **Example:** set it to 1, so that every employee has only the company card you created for them and nobody creates extra cards for private use.

**Watch out:** the limit is the same for all employees and team members; there is no exception for an individual person. If one employee needs another card, raise the number temporarily, let them create the card, then set the number back: the card already created stays. The message to the employee always points to the administrator, even when the limit was set by the Card Manager, so tell employees in advance whom to contact.

REAL-WORLD EXAMPLE

A real estate agency has twelve agents who are always out in the field and rarely sit at a computer. The office adds them one by one on the Employees page and sets *Maximum cards per person* to 1. Each agent opens the welcome email on their phone, sets a password and puts the card icon on the home screen, without a single call to the office. When an agent leaves the agency, the office exports the contacts from that agent's card and then deletes the agent permanently.

## 23. Team and the Card Manager role

**Where:** QR vCard Pro → Team; on the portal: *Team*

**Who:** Administrator; Card Manager on the portal, without the right to assign the Card Manager role

**Plan:** Agency only

> Do you have collaborators who maintain their own cards, or a head of sales who needs to manage people and cards without access to WordPress? Invite them to Team: each person gets a portal account, and you choose whether they are a team member or a Card Manager.

A team member has the same rights as an employee: they work only with their own cards and can create more than one. The difference lies in how the account comes about: no card is created in advance, the person sets their own password from the invitation, and they are not on the employee list. The Card Manager is the administrator's deputy for cards and people: they see and edit all of the company's cards and manage employees and the team, but they do not enter wp-admin and do not change the settings of the software or the site.

**Team member**
Their own cards and, for those cards, the QR code, email signature, virtual background, contacts and statistics. They do not see other people's cards, employees, settings, webhooks, API keys or events, and they do not invite others.

**Card Manager**
All of the company's cards, employees, the team, analytics and the contacts of all cards. No access to wp-admin, settings, branding, the license or team signatures. Only the Administrator assigns this role.

Without the Agency plan, the page shows an upgrade message (“Team Workspace: Agency tier feature” in wp-admin, “Team is available on the Agency tier” on the portal), the Team item is missing from the portal menu, and the Team tile on Home shows a padlock.

### How do you invite a new member?

1. Open QR vCard Pro → Team and scroll down to the *+ Invite a new employee* form (the *+ Invite employee* button at the top of the page also takes you there), or on the portal open *Team*, section ➕ *Invite a team member*.
2. Enter the email and, optionally, the first and last name.
3. If you are the Administrator, choose the role. The Card Manager does not see this field and always invites a team member.

4. Click *Send invitation* → (on the portal, ✓ *Send invitation*). The confirmation is "✓ Invitation sent successfully." (on the portal, "Invitation sent.").

**Options**

**Email *** Required

For a new address, the software creates an account with portal access. The username is formed from the part of the address before the @ sign, and the person sets the password themselves, from the invitation. An invalid address is rejected with the message "Invalid email address." What happens with an address that already exists on the site is explained in the Watch out boxes below.

**Example:** for an external collaborator you enter the address where they actually read their email, because the password link, which expires quickly, is sent there.

**First name** Default: empty (optional)

The first name of the account. When it is entered, the display name becomes "First name Last name": that is the name you see the person under on the list, and the greeting in the invitation also starts with it.

**Example:** you enter "Laura", so that the invitation starts with "Hello Laura Bennett," instead of the username.

**Last name** Default: empty (optional)

It is saved to the account and, together with the first name, forms the display name.

**Example:** two collaborators are both named Mark; the last name on the team list tells you who is who.

**Role** Default: Team member · chosen by the Administrator only

*Team member* works only with their own cards. *Card Manager* gets the rights described in the table below. On the portal, only the Administrator sees this field; an invitation sent by a Card Manager is always for a team member.

**Example:** the owner of a dental practice invites her office manager as a Card Manager, so that the office manager can add new dentists and nurses herself, and invites dentists from other practices who occasionally work for her as team members.

**What does the invited person receive by email?**

The invitation is a plain-text email with the subject "You have been invited to the team: {site name}". It starts with the greeting "Hello" and the person's name, explains that they have been invited to create their own digital vCard and lists what they can do with it: have their own QR code, share their contact with a single scan, use an HTML email signature and follow scan statistics. Then come the link for setting the password, the portal address where they sign in afterward, and the username. The invitation states that the password link expires in 24 hours and that if it does, they should ask for a new invitation. Each new invitation to the same person carries a new link, and the previous one stops working.

**What does the team list show?**

In wp-admin, above the list, there are counters for *team members*, *active*, *pending confirmation* (only when there are any) and *cards total*. The table has the columns *First name* (your row is marked *you*), *Email*, *Role* (*Administrator*, *Card Manager* or *Team member*), *Cards*, *Status* and *Actions*. The number in the Cards column includes published cards, drafts and pending cards, and it links to that person's card list. On the portal, the columns are *Member* (name and email), *Role* (*You*, *Administrator*, *Card Manager* or *Team member*), *Status*, *Cards* and *Actions*.

- *Pending confirmation* (on the portal, *pending*), with the number of days since the invitation: the person has been invited but has not signed in even once.
- *Active* (on the portal, *active*): the person has signed in at least once, by any route.

Employees appear on the list as well: they have the same portal role as a team member, so they are labeled *Team member* and always have the status *Active*. The list shows up to 200 accounts. The Administrator also sees other administrators on it; the Card Manager does not see administrators.

**What do the buttons in the Actions column do?**

**Resend** on the portal: 🔄 Resend invitation

Sends a new invitation with a new password link, and the previous link stops working. The confirmation is "✓ Invitation resent." (on the portal, "Invitation resent."). The Administrator can do this for all team members and Card Managers except themselves; the Card Manager only for team members. Because the invitation leads to the screen for a new password, this is also how you let a team member who has forgotten their password set a new one.

**Example:** a collaborator opened the invitation only after the weekend and the link no longer works; you click *Resend* and within a minute he has a new one.

**Make Card Manager / Change back to team member** on the portal: ⬆ and ⬇ · Administrator only

Switches the role between team member and Card Manager. The person keeps their account, password and cards. The confirmation is "✓ Role changed." If you promote an employee this way, they disappear from the Employees list, because a Card Manager is not an employee.

**Example:** a sales representative who was a team member becomes head of sales; you click *Make Card Manager*, and the next time he opens the portal he already sees all cards and the Employees page.

**Deactivate** on the portal: ✗

After confirmation ("Are you sure you want to deactivate this user? Their cards will not be deleted.", on the portal "Deactivate this team member?"), the person loses access to the portal: the team member or Card Manager role is removed, they are signed out on all devices and their sign-in links are canceled. If they have no other role on the site, the account remains as a subscriber. The cards stay untouched and publicly available. The confirmation is "✓ User deactivated. Their cards remain intact." (on the portal, "Team member deactivated."). Who may use this action is the same as for Resend; you cannot deactivate yourself or an administrator.

**Example:** your work with an external consultant has ended; you deactivate him, and his card stays until you decide what to do with it.

In your own row, instead of buttons, it says *that's you*. For accounts you cannot manage, wp-admin shows *WP Users*, because they are managed under WordPress Users; on the portal this cell is empty.

> **Permanently deleting a team member:** the software does not offer this. If necessary, the Administrator deletes the account under WordPress Users. WordPress then asks what to do with that user's content; to keep their cards, attribute the content to another user.

**What can a Card Manager do, and what can't they do?**

| Area | A Card Manager can | Cannot |
|---|---|---|
| **Access** | The portal, with Home as the first screen | wp-admin (they are sent back to the portal) and the WordPress toolbar on the site |
| **Cards** | All of the company's cards: editing, Builder, statistics, QR code, email signature, virtual background and contacts of each card; moving a card to the Trash with the *Delete* button; new cards without the per-person limit (the plan limit still applies) | Restoring a card from the Trash and deleting a card permanently (the Administrator does this in wp-admin) |
| **Contacts and analytics** | Contacts from all cards, their CSV export and deletion; Card analytics; Team analytics and Team contacts for all employees (from the Unlimited plan); viewing the ROI dashboard | Changing the assumptions in the ROI dashboard |
| **Employees** | Adding, CSV import (Agency), new link, link revocation, deactivation and permanent deletion of any employee; the Maximum cards per person setting | Adding back a deactivated employee who was added by someone else |
| **Team** | Inviting team members; resending invitations to team members and deactivating them | Inviting Card Managers, assigning and removing that role; actions on other Card Managers and administrators; inviting existing accounts that are not team members |
| **Integrations and tools** | Webhooks and API keys (only the entries they created themselves), viewing Events, writing NFC cards for all cards, Google Wallet and the AI assistant when the Administrator turns them on, the Marketing tabs View, Campaigns and Help | Creating events, ODOO ERP support, Google Wallet setup, the NFC and AI assistant switches, the other Marketing tabs |
| **Settings** | Nothing | Settings, Branding, Privacy and GDPR, Team email signatures, White-label, license and updates |
| **Images** | The Media Library with files from all portal users, images from all cards and the company logo; uploading images up to 200 KB | Uploading images larger than 200 KB |

> **Note:** Team analytics and Team contacts cover all employees added on the Employees page. Do not look there for team members invited through Team: their cards are in Card analytics, and their contacts are on the Contacts screen, which shows the Administrator and the Card Manager the contacts from all cards.

At the bottom of the Team page there is also the *Maximum cards per person* box. It is the same setting as on the Employees page and applies to employees and team members together; it is described in the chapter Employees.

**Watch out:** do not invite existing editor, author or store customer accounts to Team. When the Administrator invites such an account, the software adds the team member role to it ("✓ Role added to existing user + invitation sent."), and from then on wp-admin sends that person back to the portal and the WordPress toolbar is no longer shown to them. If this has already happened, click *Deactivate* in the team list: only the portal role is removed and the previous role stays (the person is also signed out on all devices, once). Create a portal account for such a person with a different email address. Do not enter the address of another administrator either: they only receive an invitation with a password change link, and their role does not change. A Card Manager cannot invite an existing account unless it is already a team member; in that case the invitation is simply sent again, and otherwise the message is "A user with this email address already exists and cannot be invited to the team."

**Watch out:** deactivate employees on the Employees page, not here. Deactivation in Team does not remove the person from the employee list, so a new link from that list would lead to an account that no longer has portal access. Only the Administrator can bring back a deactivated team member, by inviting the same address again; the person returns as a team member, and you then restore a Card Manager with the *Make Card Manager* button.

REAL-WORLD EXAMPLE

An IT company has twenty employees and four external consultants. The managing director, who is the Administrator, invites the head of sales as a Card Manager: from then on he adds new sales representatives himself, sends them their links and follows Team analytics, and the director does not have to give him access to wp-admin. She invites the consultants as team members, so each of them creates their own card showing their specialty. Settings, branding and the license stay with her alone.

## 24. Login, password and first sign-in

**Where:** email or message with a link; portal: https://your-site.com/qr-portal/ | **Who:** all portal users | **Plan:** all plans

> Signing in to the portal for the first time, or need to explain to a new colleague how to get in? An employee gets in with a one-time link and sets a password right away, a team member sets a password from the invitation, and after that everyone signs in with email and password.

The portal is a page on your site, at https://your-site.com/qr-portal/. The Administrator signs in to it with their WordPress account. The other accounts are created on the pages described in the chapters Employees and Team and the Card Manager role, and they differ only in the first sign-in.

### What does an employee's first sign-in look like?

1. The employee receives the email "Your digital business card from {company} is ready" with the 📱 *SET UP MY CARD* button, or a message with the link sent by their manager. The link is valid for 30 days and works only once.
2. The employee opens the link on their phone. The software signs them in right away and opens the portal on the *Set your password* screen, with the explanation "The first sign-in link works only once. Set a password so you can sign in to the portal later." and a note of the email address they sign in with.
3. In the *New password* and *Repeat password* fields, they enter the same password of at least 8 characters and click *Save password*. A shorter password is rejected with the message "The password must have at least 8

characters.”, and two different values with “The passwords do not match.”

4. After the message “Password saved.”, their public card opens with the intro for adding an icon to the phone's home screen.
5. They then follow the intro's steps for their phone and close it with the *Got it, thanks!* button. From then on they open the card with a single tap and sign in to the portal with email and password.

Until the password is saved, the same reminder appears at the top of every portal screen, with a *Set your password* link. The first password set after the link does not trigger the WordPress password change notification.

> **Watch out:** if the employee does not save a password after the first sign-in and then signs out, they cannot sign in again, because nobody knows the password the software created. In that case, they should click *Forgot password?* on the sign-in form or ask for a new link.

**What is the “Add to Home Screen” intro?**

The intro appears over the public card after the first sign-in, with the greeting “Welcome, {first name}!” and the message “This is your digital business card. Add it as an icon on your phone for 1-tap access.” The steps depend on the phone:

- **iPhone (Safari):** tap the share button ⎙ at the bottom of the screen, choose “Add to Home Screen” and confirm.
- **Android, Chrome:** wait a few seconds for the browser to offer to add the page and tap “Add”; if the offer does not appear, choose “Install app” in the ⋮ menu at the top right.
- **Android, other browsers:** open the browser menu (☰ or ⋮) and choose “Add to Home screen”; on a Samsung phone, “Add page to”, then “Home screen”.

The *Got it, thanks!* button or ✕ closes the intro, and it is not shown again in that browser. The icon can also be added later with the *Icon on phone display* button on the public card. The intro is written in Serbian and does not change language along with the card.

### What does a team member's first sign-in look like?

1. The team member receives the email “You have been invited to the team: {site name}” with the link for setting a password, the portal address and their username.
2. The link opens the WordPress screen for a new password. There they enter a password and save it. The invitation states that the link expires in 24 hours; if they do not get to it in time, they ask for a new invitation.
3. They open the portal address from the invitation and sign in with their username or email and the new password. If they sign in on the WordPress login page, the software redirects them to the portal as well.
4. With the first sign-in, their status on the team list becomes *Active*. Since they do not have a card yet, the welcome screen awaits them on the *My card* screen.

**What does the welcome screen offer?**

Anyone who does not yet have a published card on the portal sees the welcome screen until they complete the intro. It shows the greeting “Welcome, {name} 👋”, a short explanation, four benefits of the card and two buttons: *Quick Start (3 minutes)* and *Classic: all options*. With a plan that limits the number of cards, it also shows how

many cards have been used. Quick Start is a four-step wizard (“Step 1 of 4”, with *Back* and *Next* buttons) that creates the card and publishes it right away.

**Introduce yourself**

The first step: *First name*, *Last name*, *Position (e.g. Sales Director)* and *Company*. At least a first or last name is required (“Enter a first or last name.”). Everything can be changed on the card later.

**Example:** a consultant enters a first name, a last name, “Tax Advisor” and the name of their practice, and the card already has everything needed for a first introduction.

**How can people contact you?**

The second step: *Phone* and *Email*. The phone is saved as a mobile number, the email as a business address. The only check is that the email contains the @ sign (“Invalid email address format.”); empty fields are not rejected, so enter at least one detail, as the screen also says.

**Example:** you enter the mobile number you also answer outside the office and your work email for quotes.

**Choose a theme**

The third step: one of eight color themes (Earth Tones, Corporate Blue, Forest Green, Royal Pink, Bold Red, Premium Gold, Dark Tech, Personal Rose). The *Create card* button creates and publishes the card. The fourth step, “Your card is live! 🎉”, shows its address and the *Go to card* button, which opens the form for further editing.

**Example:** a lawyer chooses *Corporate Blue* and a florist *Royal Pink*; the colors can be changed later in the card's appearance.

**Classic: all options**

Skips the wizard, records the intro as completed and opens the full form for a new card.

**Example:** a team member who already knows what they want goes straight to the form and fills in the social networks and the gallery as well.

If you close the wizard (✕, the Esc key or a click outside it), the intro is not recorded as completed and the welcome screen appears again. When the number of cards allowed by the plan, or by the Maximum cards per person setting, has been reached, the wizard does not create a card and shows a message about the limit. The card form and appearance are described in detail in the chapters Creating and editing a card and Appearance: templates, free layout and colors.

### How do you sign in later?

1. Open https://your-site.com/qr-portal/. If you are not signed in, you see a form with the portal name and the message “Sign in to manage your QR vCards and view statistics.”
2. Enter your email or username in the *Username or email* field and your password in the *Password* field.
3. Optionally turn on *Remember me* and click *Sign in*. After the message “Welcome back!”, the Administrator and the Card Manager land on *Home*, and employees and team members on *My card*.

**Remember me** Default: off

The browser remembers you even after it is closed, so you do not have to sign in every time you open the portal. WordPress determines for how long.

**Example:** on your work phone you turn on *Remember me*; on a shared computer at a trade fair booth you leave it off and sign out at the end of the day.

Other form messages: “Wrong username or password.” (check your details or click *Forgot password?*), “Please enter your username and password.”, “Security check failed. Please try again.” (this usually means the page was open for a long time; refresh it and try again) and “Your account does not have permission to access this portal.” (the account exists but has no portal access, for example after deactivation; the software then also signs it out). The portal name on the form is set as described in the chapter Branding, and the language selection on the form is described in the chapter Portal language, card language and automatic translation.

### What if you have forgotten your password?

1. On the sign-in form, click *Forgot password?*. The WordPress page for a new password opens.
2. Enter your username or email and confirm. WordPress sends an email with a link for a new password.
3. Open the link, set a new password and sign in. After signing in, the software takes portal users to the portal.

Instead, an employee can ask for a new link (the 🔄 button on the Employees page), and a team member for a new invitation (*Resend* on the Team page); both routes lead to setting a new password.

You can also change your password when you know it: add `?qrvp_view=password` to the end of the portal address and the *Set your password* screen opens. After the change, WordPress sends its usual password change notification, and sign-ins on other devices stop being valid.

### What do the messages mean when the first sign-in link does not work?

Each of these messages is shown on the portal sign-in form.

| Message | What it means | What to do |
|---|---|---|
| **“This link has already been used. Sign in with your password or ask the administrator for a new link.”** | The link has already been opened once. | Sign in with your password; if you have not set one, click *Forgot password?* or ask for a new link. |
| **“The link has expired. Ask your admin for a new link.”** | 30 days have passed since the link was created. | The manager sends a new link (🔄). |
| **“The link has been revoked. Ask your admin for a new link.”** | The link was revoked with the 🚫 button, the account was deactivated, or a newer link has been sent in the meantime, which cancels the old one. | Open the newest link or ask for a new one. |
| **“The token is not valid.”** | The account is no longer allowed to sign in with a link, for example because the person has become a Card Manager. | Sign in with your password. |
| **“The token does not exist.”** | The link does not match any record, for example because it was copied incorrectly or expired long ago. | Ask for a new link. |
| **“The user associated with this token does not exist.”** | The account has been deleted. | The manager adds the employee again. |

If the link opens an ordinary page of the site, without signing you in and without a message, the link is incomplete: part of it was lost when it was copied. Copy it again, in full.

**What happens when someone who is already signed in opens the link?**

- If the same employee is already signed in on that browser (for example, they tap the link in the email again), the link is not used up and their card opens.
- If someone else is signed in, for example a manager who wanted to check the link before sending it, the link is not used up, the sign-in does not change, and the portal reports “This link belongs to another user. Send it to the person it is intended for.”

> **Watch out:** the protection described in the second item works only in the browser where you are signed in. If you open an employee's link in a private window, in another browser or on another phone, the software signs you in as that employee and the link is used up. In that case, sign out and send the employee a new link. If an employee gets the message that the link has already been used but says they never opened it, the link was opened before them: by someone the message was forwarded to, or by a program that automatically checks links in messages. Here, too, the solution is a new link.

**Why does wp-admin send you back to the portal?**

The Card Manager, employees and team members work only on the portal. If they open wp-admin, the software sends them back to the portal, and the WordPress toolbar at the top of the site is not shown to them. The exceptions are the WordPress profile and the image upload pages that the card form uses. Signing in through the WordPress login page also takes them to the portal. The Administrator has both wp-admin and the portal, and after signing in through WordPress stays in wp-admin.

Accounts with other roles on the site (editor, author, subscriber, store customer) cannot use the portal. The portal shows them the sign-in form even when they are signed in to the site, and if they submit it, the software signs them out with the message “Your account does not have permission to access this portal.”

**How do you sign out?**

The *Sign out* button is in the portal header, next to the greeting “Hi, {name}”. It signs you out and returns you to the portal sign-in form. A WordPress sign-out started from the portal also returns you to the portal.

**What is the share page, and do you need it?**

The share page is an optional page of the site from which a signed-in user can quickly send their card. The software does not create it on its own: in WordPress, create a new page (Pages → Add New), enter the shortcode `[qrvp_share]` in its content and publish it. When such a page exists, first sign-in links go through it, and it also serves as a fallback destination if the employee's card does not have a public address yet. A visitor who is not signed in sees only the message “You must be signed in to share a card.” The page offers the following:

**Card:** visible only when you have more than one published card

Selects which of your cards you are sharing; the other buttons apply to the selected one.

**Example:** an agent who has a personal card and a separate card for a new-build project selects the second one before sending it to an apartment buyer.

**Send my card:**

You enter an email address or a phone number in the field and click 📤 *Send*. For an email address, the site immediately sends a message with your card's link (at most 10 messages per hour per user); for a phone number, the SMS app on your phone opens.

**Example:** after a phone call with a new customer, you enter their email and within seconds they have your card.

**or share quickly**

The WhatsApp, Viber and Telegram buttons open that app with a message containing the card link, and *Copy* copies just the link.

**Example:** you send your card to a Viber group with your contractors with a single tap.

**Show QR code for scanning**

Opens a large QR code of the card, with the caption “Show this code to someone to scan” and the card address.

**Example:** at a trade fair you turn your phone toward the person you are talking to, and they scan the code with their phone.

**Add an icon to your home screen for 1-tap access**

A bar with an *Add* button that appears when the browser offers to put the page on the home screen; on an iPhone it shows an instruction to tap ⎙, then “Add to Home Screen”.

**Example:** a salesperson adds the share page icon to the home screen and sends the card from it, without opening the portal.

REAL-WORLD EXAMPLE

A service technician at an air-conditioning distributor gets a Viber message with the link from his manager while out in the field. He opens it on his phone, sets a password and puts the card icon on the home screen, all in two minutes between two service calls. A month later he loses his phone. On the new phone he opens the portal, signs in with email and password and restores the icon with the *Icon on phone display* button on his card, without any help from the office.

## 25. QR portal: screens and who sees what

**Where:** portal: https://your-site.com/qr-portal/ **Who:** all portal users; the menu depends on the role

**Plan:** all plans; some screens require 5 Sites, Unlimited or Agency

> Wondering what an employee will see after signing in, or where a particular feature is? The portal shows each person only what their role allows, and this chapter gives an overview of all the screens and who sees them.

The QR portal is a page of your site that the software creates on activation (default title “QR Portal”). Employees, team members and Card Managers do all their work there, while the Administrator chooses whether to work on the portal or in wp-admin. The first screen after signing in depends on the role: the Administrator and the Card Manager land on *Home*, employees and team members on *My card*.

**What is in the header?**

The header contains the portal logo and name, which lead to the first screen, the portal language selector, the greeting “Hi, {name}” and the *Sign out* button. Success or error messages after each action appear above the content. The portal name and logo are set as described in the chapter Branding, and the language selector is described in the chapter Portal language, card language and automatic translation.

**What items does the menu have, and who sees them?**

The items are listed in the order in which they appear in the menu.

| Menu item | Who sees it | Plan | What is there |
|---|---|---|---|
| ***Home*** | Administrator, Card Manager | all | Account overview and tiles for all tools (described below) |
| ***Cards / My card*** | everyone (Cards for the Administrator and the Card Manager, My card for everyone else) | all | Card list: Card list, statuses, deletion and limits |
| ***Team analytics*** | Administrator, Card Manager | Unlimited | Combined results for your cards and the cards of all employees: Team analytics and team contacts |
| ***Card analytics*** | Administrator, Card Manager | all | Ranking of all cards by scans: Analytics: what is measured and where to see it |
| ***Team contacts*** | Administrator, Card Manager | Unlimited | Contacts from your cards and the cards of all employees, with filters and CSV export: Team analytics and team contacts |
| ***Employees*** | Administrator, Card Manager | Unlimited; CSV import: Agency only | Employees |
| ***Webhooks*** | Administrator, Card Manager | Unlimited | Webhooks |
| ***API keys*** | Administrator, Card Manager | 5 Sites | REST API and API keys |
| ***Events*** | Administrator, Card Manager | Unlimited | View only; events are created in wp-admin: Events |
| ***Team*** | Administrator, Card Manager; the item exists only with Agency | Agency | Team and the Card Manager role |
| ***Email signatures*** | Administrator only; the item exists only with Agency | Agency | Team email signatures |
| ***Settings*** | Administrator only | all | The General, Branding, Privacy and GDPR, Lead Capture and Language tabs: Settings: structure and the General tab |
| ***ROI dashboard*** | Administrator, Card Manager | all | Only the Administrator changes the assumptions: ROI dashboard |
| ***Complete guide*** | everyone | all | This guide |
| ***ODOO ERP support*** | Administrator only | all | Odoo ERP |
| ***Google Wallet*** | everyone while the feature is active; the Administrator always | all | Google Wallet |
| ***NFC cards*** | everyone while the section is turned on; the Administrator always | all | NFC cards |
| ***AI assistant*** | everyone while it is turned on; the Administrator always | all | AI assistant |

| Menu item | Who sees it | Plan | What is there |
|---|---|---|---|
| ***Marketing*** | everyone while the module is turned on; the Administrator always | all | Other users see the View, Campaigns and Help tabs: Marketing module and Google reports |

The Administrator and the Card Manager see the Team analytics, Team contacts, Employees, Webhooks, API keys and Events items even when the plan is not sufficient; the screen itself then shows an upgrade message. If you open a screen you have no right to, the portal reports “You do not have access to this section” and offers the *Back to cards* button.

### Which screens have no menu item?

You reach these screens with buttons on the card, in the quick actions toolbar or from other screens. A card owner opens them for their own cards; the Administrator and the Card Manager for all cards.

| Screen | How to open it | Plan | Chapter |
|---|---|---|---|
| **New card** | the *New vCard* button on the list, *New card* in the quick actions toolbar and on Home | all, subject to the card limit | Creating and editing a card |
| **Card editing** | the *Edit* button | all | Creating and editing a card |
| **Builder: free layout** | *Open builder (arrange elements)* in the card form, when a template is selected | templates from Single Site | Appearance: templates, free layout and colors |
| **Statistics** | the *Statistics* button | basic part all, advanced part 5 Sites | Analytics: what is measured and where to see it |
| **QR code** | the *QR code* button | all | QR code: download, logo and printing |
| **Email signature** | the *Email signature* button | 5 Sites | Email signature |
| **Virtual background** | the *Virtual background* button | 5 Sites | Virtual background and vertical card |
| **Contacts** | the *Contacts* button on the card (that card's contacts) or in the quick actions toolbar (no card selected: employees and team members see the contacts from their own cards, the Administrator and the Card Manager those from all of the company's cards) | 5 Sites | Contacts: overview, tags, notes and export |
| **Scan business card** | the 📷 *Scan* button on the Contacts screen | 5 Sites, with a monthly scan limit | Paper business card scanner |
| **Set your password** | the link in the reminder after the first sign-in, or `?qrvp_view=password` at the end of the portal address | all | Login, password and first sign-in |

### What is on the Home screen?

The Administrator and the Card Manager have Home in their menu. At the top are the greeting “Hi, {name}”, the *Complete guide* button and the name of your plan. While there is no published card on the site, below that is the intro “Let's create your first card” with three steps and the *+ Create your first card* button; the Administrator also sees the *or set up branding first* → link. Once cards exist, the intro is replaced by three counters, *cards*, *scans* and *contacts*, for all of the company's published cards (up to 500), with links to the card list, Card analytics and Team contacts. Below them are the tiles, grouped as follows:

| Group | Tiles | Who sees them |
|---|---|---|
| ***Cards and contacts*** | *Cards*, *New card*, *Team contacts*, *Lead Capture* | Cards and New card: everyone who sees Home; Team contacts: the Administrator and the Card Manager; Lead Capture: the Administrator only |
| ***Analytics and events*** | *Card analytics*, *Team analytics*, *ROI dashboard*, *Events* (🔒 without Unlimited) | Administrator, Card Manager |
| ***Team*** | *Employees* (🔒 without Unlimited), *Email signatures* (🔒 without Agency), *Team* (🔒 without Agency) | Email signatures: the Administrator only; the rest: the Administrator and the Card Manager |
| ***Integrations*** | *ODOO ERP support*, *Google Wallet*, *NFC cards*, *AI assistant*, *Marketing*, *Webhooks* (🔒 without Unlimited), *API keys* (🔒 without 5 Sites) | ODOO ERP support and Google Wallet: the Administrator only; NFC cards, AI assistant and Marketing: only while they are turned on; the rest: the Administrator and the Card Manager |
| ***Account*** | *Settings* | Administrator only |

The padlock 🔒 means the feature requires a higher plan; the tile still opens the screen, which then shows an upgrade message. The *NFC cards* tile is not shown while the NFC section is turned off, not even to the Administrator, although the Administrator still has the menu item in that case.

**What is on the My card (or Cards) screen?**

At the top are the counters *Total cards*, *Total scans* and *Scans today*, then the quick actions toolbar, the heading “Your QR vCards” with the *New vCard* button, and the card tiles with the buttons *Edit*, *Statistics*, *QR code*, *Email signature*, *Virtual background*, *Contacts* and *Delete*. Employees and team members see their own published cards; the Administrator and the Card Manager see up to the 200 newest cards of the company, with a notice about the valid license. The details are in the chapter Card list, statuses, deletion and limits.

**What is the quick actions toolbar?**

The toolbar appears on the My card (Cards) screen when you have at least one card of your own, published or draft, and until you hide it. It offers only your own cards, to the Administrator and the Card Manager as well.

**New card**

Opens the form for a new card. It is not shown once you have reached the Maximum cards per person setting.

**Example:** a real estate agent creates a second card, just for the new-build project they are selling.

**Statistics**

Opens your card's statistics; if you have more than one card, you first pick the card from a drop-down list.

**Example:** after a trade fair, you check how many people scanned your card that day.

**Email signature** Plan: 5 Sites and higher

Opens your card's email signature, with a choice of card if you have more than one.

**Example:** after changing the phone number on your card, you copy the new signature right away.

**Contacts** Plan: 5 Sites and higher

Opens contacts with no card selected: employees and team members see the contacts from all their own cards, and the Administrator and the Card Manager the contacts from all of the company's cards.

**Example:** on Friday you review all the contacts collected during the week, without opening each card separately.

**Start tutorial**

Opens the Quick Start wizard, the same one as on the welcome screen (see Login, password and first sign-in). The wizard creates a new card; it is not a tour of the existing screens.

**Example:** for tomorrow's trade fair you need a separate card in a different color; *Start tutorial* creates it in three minutes, with your name, contact details and theme.

**× (Hide toolbar)**

Removes the toolbar permanently for your account. There is no option in the interface to bring it back, so hide it only if you really do not need it.

**Example:** a Card Manager who works only with other people's cards hides the toolbar to keep the list easier to scan.

**What restrictions apply to portal accounts?**

- **wp-admin.** The Card Manager, employees and team members do not enter wp-admin; this is described in the chapter Login, password and first sign-in.
- **Image size.** These accounts upload images of up to 200 KB. A larger image is rejected with the message “Image is too large (…). Maximum allowed size is …”, with a suggestion to compress it with a free tool such as tinypng.com or squoosh.app. The Administrator does not have this limit.
- **Media Library.** When choosing an image in the card form, employees and team members see only their own files, images from their own cards and the company logo. The Card Manager sees files from all portal users, images from all cards and the company logo. The Administrator sees the entire library.

**For the site administrator:** you change the 200 KB limit by adding the line `define( 'QRVP_MAX_UPLOAD_BYTES', 512000 );` to the wp-config.php file, above the line with the text “That's all, stop editing!”. The value is in bytes (512000 is 500 KB), and 0 turns the limit off.

REAL-WORLD EXAMPLE

A restaurant with three locations uses the portal for its floor managers and its events manager. The owner is the Administrator and the only one who sees Settings. The events manager is a Card Manager: every Monday she opens *Home* and *Card analytics* and sees which card brought in the most inquiries about celebrations. The floor managers are employees: after signing in they see only *My card* and the quick actions toolbar, so nobody can accidentally change someone else's card or the site settings.

# 26. Email signature

**Where:** on the portal: the *Email signature* button on the card and in the quick actions toolbar; QR vCard Pro → All cards → card editing, *Email signature* box

**Who:** the card owner; the Administrator and the Card Manager for all cards

**Plan:** 5 Sites and higher

> Sending dozens of emails a day, and recipients still ask for your number or address? Create a signature with your card's QR code and paste it into Gmail, Outlook or Apple Mail: every message then carries your business card as well.

The software builds an HTML signature from your card's details. There is one layout, the same for everyone; you shape it through the details on the card, the logo choice and, for the whole company, the team signature policy. The details are always pulled from the card ("Data is pulled from your QR card. If you want to change it, edit the card."), so you do not edit the signature separately. Without the 5 Sites plan, the screen shows the feature description "Email signature with QR code" and the *View pricing* → button.

**What does the signature contain?**

- The photo from the card, in a circle with a border in the accent color.
- The company logo from the card above the name, if the card has one and you have chosen to show the logo.
- The name, with "position · company" below it.
- The first phone number, first email, first website and LinkedIn from the card, each with an icon and a link.
- The "View digital card →" button, which leads to your public card.
- On the right, the card's QR code with the caption "Scan to save"; on the portal, the QR code also carries the logo used on your QR codes.
- The line "★ Powered by QR vCard Pro" with a link to the vendor's website.
- If the Administrator has set a team signature policy: the CTA line and the legal disclaimer at the bottom (see Team email signatures).

The accent color is your card's color, unless the team policy sets one color for everyone.

### How do you create the signature on the portal?

1. On the My card screen, click *Email signature* on the card, or *Email signature* in the quick actions toolbar.
2. Look at the *Signature preview* and, on the right, the *Data in the signature* box. If something is not right, click the *edit the card* link, correct the details and come back.
3. If the card has a logo, choose *With logo* or *Without logo*.
4. Click *Copy HTML signature* and paste the signature into your email program following the instructions for Gmail, Outlook or Apple Mail below. The same instructions are also in the app, in the *Instructions for setting up the signature* section.

**Options**

**Company logo: With logo / Without logo**

Default: With logo (on the portal it follows the team policy) · visible only when the card has a logo

Shows or hides the company logo above the name. The preview changes immediately, and the signature is copied exactly as you see it.

**Example:** for internal messages to colleagues you use the signature without the logo, and for quotes to customers the one with the logo; create both and save them in Gmail under different names.

**Copy HTML signature**

Copies the signature with its formatting, images and links, ready to paste. On the portal the confirmation reads “Copied! Paste it into your email client.”, and if copying fails, “Copy failed. Use "Show raw HTML code" and copy manually.” In wp-admin the confirmation is “✓ HTML copied to the clipboard. Now paste it into your Gmail/Outlook settings.”

**Example:** you click the button, open the Gmail settings and paste the signature into the signature field.

**Download as image (PNG)**

Downloads the signature as an image. On the portal this is a faithful snapshot of the preview, the file email-signature.png; for it, the browser must be connected to the internet, because it loads a helper tool from an external server. In wp-admin the image is simplified: no logo, and emoji instead of icons. Links in the image cannot be clicked.

**Example:** you send your manager an image of the signature for approval before you set it up.

**Download HTML file (.html)** portal only

Downloads the signature as the file email-signature.html, which can be opened in a browser or handed to whoever sets up signatures.

**Example:** your IT department sets up everyone's signatures centrally; you send them the file instead of configuring Outlook yourself.

**Show raw HTML code**

Opens a field with the signature's HTML code, for manual copying. In wp-admin the button reads *Show raw HTML code →*.

**Example:** the copy button does not work in your browser, or your email program requires the signature to be entered as HTML code; select all the text in the field and copy it.

### How do you set up the signature in Gmail?

1. On the portal, click *Copy HTML signature*.
2. In Gmail, open Settings (⚙) → “See all settings”.
3. Scroll down to the “Signature” section and click “Create new”.

4. Enter a name for the signature, click OK and paste the signature into the field (Ctrl+V, or Cmd+V on a Mac).
5. At the bottom of the page, click “Save Changes”.

If Gmail is set to a language other than English, the item names are translated, but the order is the same. In the same section you also choose whether the signature is added automatically to new messages and to replies.

### How do you set up the signature in Outlook?

**Outlook on the web:**

1. Click *Copy HTML signature*.
2. In Outlook, open Settings (⚙) → “View all Outlook settings”.
3. Choose Mail → Compose and reply → Email signature.
4. Paste the signature and click Save.

**Outlook desktop app:**

1. Click *Copy HTML signature*.
2. In Outlook, open File → Options → Mail → Signatures and click New.
3. Paste the signature and save.

### How do you set up the signature in Apple Mail (macOS)?

1. Click *Copy HTML signature*.
2. In Mail, open Mail → Settings → Signatures.
3. Add a new signature with the + button and paste the signature.
4. Turn off the “Always match my default message font” option, as the instructions in the app also point out; otherwise Mail changes the fonts in the signature.

### How is the box in wp-admin different?

The Administrator can also create the signature on the card edit screen, in the *Email signature* side box, with the same logo choice, the *Copy HTML signature*, *Download as image (PNG)* and *Show raw HTML code* → buttons and the short instructions *How do I install the signature?*. That box does not apply the team signature policy, its QR code has no logo, there is no HTML file download, and the preview may look slightly different from the real signature, because it is displayed inside a wp-admin page. For signatures you hand out to employees, use the portal or the gallery described in the chapter Team email signatures.

> **Watch out:** the “★ Powered by QR vCard Pro” line and the “Scan to save” caption are always part of the signature and cannot be removed, not even with White-label. The photo and logo are embedded in the signature itself, and email programs do not always display such images the same way; before you start using the signature, send a test message to yourself and to someone who uses a different program, for example to a Gmail and an Outlook address. A signature you have already pasted does not update itself: after a change to the card or the team policy, copy it again and replace the old one. If the card does not have a public address yet, the screen reports “The card doesn't have a URL yet. Open it for editing and save.”

REAL-WORLD EXAMPLE

A law office with five attorneys sends dozens of emails to clients every day. Each attorney opens *Email signature* on the portal, chooses the version with the firm's logo and pastes the signature into Outlook. A client reading the message on a computer scans the QR code in the signature with their phone and immediately has the attorney's number and the office address, without retyping anything.

## 27. Team email signatures

**Where:** QR vCard Pro → Email signatures; on the portal: *Email signatures* | **Who:** Administrator only | **Plan:** Agency only

> Want every signature in the company to have the same color, the same call to action and the same legal text, without explaining to anyone what to add? Set the signature policy once: the software builds it into the signature of every card.

The policy changes four things: the accent color, the default logo display, the CTA line and the legal disclaimer. The signature layout stays the same (see Email signature). The software does not push signatures into email programs and does not enforce them: the policy is built into a signature when the signature is generated, and everyone still copies and pastes it themselves. Below the policy is a gallery with the signature of every published card, from which you can also copy signatures for other people. The Card Manager does not see this page. Without the Agency plan, the page shows “Team signature management: Agency tier” (on the portal, “Team email signatures: Agency tier”), and the Email signatures item is missing from the portal menu.

### How do you set the signature policy?

1. Open QR vCard Pro → Email signatures, section *Company signature policy*, or on the portal *Email signatures*, section *Signature policy (applies to all)*.
2. Fill in the fields you need; a field you leave empty does not change the signatures.
3. Click *Save policy* (on the portal, ✓ *Save policy and refresh signatures*). The confirmation is “✓ Signature policy saved. It applies to all team signatures.” (on the portal, “Signature policy saved. Previews refreshed.”).
4. Review the gallery below: the signatures have been refreshed with the new policy.
5. Tell employees to copy their signature again on the portal, or send it to them from the gallery.

### Options

**Accent color (override)** Default: empty · same label on the portal

An empty field means each signature uses the accent color of its own card. When you choose a color, all signatures get it: the border around the photo, the line next to the name, the button that opens the card and the CTA line. The field accepts only a valid color code, such as the one the color picker produces.

**Example:** the employees' cards have different colors, but the signatures should be in the company color; you enter the blue from the logo and all signatures turn blue, without any change to the cards.

**Company logo: Show the company logo in signatures (when the card has a logo)**

Default: on · on the portal: Show the company logo in the signature

Sets the initial choice of *With logo* or *Without logo* in personal signatures on the portal and in the gallery. The logo is shown only for cards that have one. The choice is not locked: a user on the portal can still choose otherwise.

**Example:** the logo is already in the letterhead of all your correspondence, so you do not want it in the signature; turn the option off and the signatures open without the logo.

**CTA line (optional)** Default: empty · on the portal: CTA text and CTA link

A promotional line below the signature. It consists of a text (the example in the field: “e.g. Book a free consultation”) and, optionally, an address. With an address, the line becomes a link in the accent color. Enter the full address, including https://.

**Example:** the text “Book a free consultation” and the address of your booking calendar page, so that every message from the company leads to a booking.

**Legal disclaimer** Default: empty

Small gray text at the bottom of every signature. Line breaks are kept exactly as you enter them.

**Example:** “This email and any attachments are confidential and intended solely for the addressee.” on one line, and below it, on a second line, the company's registration number and tax ID.

**What is the signature gallery?**

In wp-admin it is called *Team signatures (N)*, and on the portal *Signatures by card*. It shows the signature for every published card on the site (up to 500, sorted by card name), with the card name and the owner's name, and with the policy already applied. While a signature is being generated, the box says “Generating signature…”.

**Copy HTML**

Copies that card's signature, ready to paste into an email program.

**Example:** the receptionist does not use the portal; you copy her signature and paste it into Outlook on her computer yourself.

**Raw HTML**

Opens the signature's HTML code for manual copying.

**Example:** you send the code to the IT department, which sets up signatures centrally in the mail management system.

**Download all (.html)** wp-admin only

Downloads a single file with all signatures, each labeled with the card name and, in parentheses, the owner's name.

**Example:** before introducing a new look, you send the file to management so they can review the whole company's signatures in one place.

### Where does the policy apply?

**It applies**
In the team signature gallery and in the personal signature on the portal (the Email signature button on the card), for all users, from the moment it is saved.

**It does not apply**
In the Email signature box on the card edit screen in wp-admin, or in signatures already pasted into email programs: those have to be copied again.

**Watch out:** the logo is not locked: even when you turn the logo display off, a user on the portal can choose With logo. Before clicking *Download all (.html)*, wait until all previews in the gallery have finished, otherwise some signatures in the file may end up without a QR code. If you move to a smaller plan, the saved policy still applies to signatures on the portal, but you no longer see the page for changing it; if you do not want the policy after the plan change, clear the fields before you switch.

REAL-WORLD EXAMPLE

An IT company with thirty employees is introducing a consistent look for its business email. The administrator sets the company's blue, the CTA line “Book a demo” with a link to the sales calendar, and a legal disclaimer. On Monday she sends everyone short instructions to open *Email signature* on the portal and copy it into Outlook, and for two colleagues who do not use the portal she copies the signature from the gallery and sends it to them. By the end of the day, all of the company's email looks the same.

## 28. Virtual background and vertical card

**Where:** on the portal: the *Virtual background* button on the card; QR vCard Pro → All cards → card editing, *Virtual background and vertical card* box

**Who:** the card owner; the Administrator and the Card Manager for all cards **Plan:** 5 Sites and higher

> Clients see you in video meetings, yet afterward nobody knows how to reach you? Set a background with your card's QR code: anyone who wants your contact details scans it straight off the screen.

The software turns your card's details into a PNG image in two formats. The 16:9 format is a background for video calls (Zoom, Teams and similar apps), and 9:16 is a vertical card for Instagram and TikTok stories, for sending from a phone or for a printed poster. The image is generated in your browser and is not stored on the server. Without the 5 Sites plan, the screen reports “Not available on your tier” and offers the *Upgrade license* → button.

### What is in the image?

- A background in the card's primary color, with a gradient and fine diagonal lines.
- A strip in the card's accent color: on the left in the 16:9 format, at the top in 9:16.

- A white frame with the card's QR code: at the bottom right in 16:9, large and in the upper half in 9:16. In the middle of the QR code is the card's logo, or, if the card has none, the logo from Branding; if there is no logo there either, the QR code has no logo.
- The caption “Scan to save contact” and the “★ QR vCard Pro” mark.
- The name (or the card title) and the position.

### How do you download the image?

1. On the My card screen, click *Virtual background* on the card.
2. Under *Select card format:*, choose *16:9 Landscape* or *9:16 Portrait*; the small preview changes immediately.
3. Click the HD or 4K button. While the image is being created, “Generating” appears below, and then the PNG file downloads.
4. For Zoom, the app suggests: “After downloading: Zoom → Settings → Backgrounds → Add Image.”

**Options**

**Select card format:** Default: 16:9 Landscape

*16:9 Landscape* is a horizontal image for a video call background, with the QR code at the bottom right. *9:16 Portrait* is an upright card with a large QR code, for phones and print. The choice also changes the download buttons.

**Example:** for tomorrow's Zoom meeting you choose 16:9, and for an Instagram story from a trade fair, 9:16.

**Download HD (1920×1080)** for 9:16: Download HD (1080×1920)

An image in Full HD resolution. It is enough for a video call background and for social media posts, and the file is smaller.

**Example:** you set the HD background in Zoom on your work laptop.

**Download 4K (3840×2160)** for 9:16: Download 4K (2160×3840)

An image with four times the area, for large screens and print.

**Example:** you print the vertical card in 4K as an A4 poster for the counter at your booth, so visitors can scan it as they walk by.

In wp-admin, on the card edit screen, the *Virtual background and vertical card* box has the same format choice and the same buttons.

### How do you set the background in a meeting app?

1. Download the image in the 16:9 format.
2. In Zoom, open Settings → Backgrounds and click Add Image; the item names may differ slightly depending on your Zoom version.
3. Select the downloaded image and check that the QR code is visible and that you do not cover it when you sit in front of the camera.

Microsoft Teams and Google Meet have a similar option for adding your own image, in the background effects settings; the software has no separate instructions for them. If you see the QR code and the text reversed, as in a mirror, in your own preview, that is usually only your view: the other participants see the image the right way around.

**Watch out:** the "★ QR vCard Pro" mark is part of the image and cannot be removed, not even with White-label. The card must have a public address, otherwise the screen reports "The card does not have a public link yet" and "Save (publish) the card to generate the QR code/link, then come back here." The image is not stored on the server, so download it again after you change the name, colors or logo on the card. If generation fails ("Generation failed. Please try again."), try once more, and if your phone is not very powerful, create the 4K image on a computer.

REAL-WORLD EXAMPLE

An export consultant runs weekly webinars for about fifty business owners at a time. She sets a 16:9 background with her card's QR code, so participants who want a consultation scan the screen with their phone and save her contact while she is still speaking. She posts the same card in the 9:16 format as an Instagram story ahead of the next webinar.

## 29. NFC cards

**Where:** QR vCard Pro → NFC cards; on the portal: *NFC cards*

**Who:** all portal users while the section is turned on; the Administrator always

**Plan:** all plans

> Want your digital card to open as soon as you hold your physical card against someone's phone, without any scanning? Write the card's address to an NFC sticker: it takes a few seconds and requires no setup at all.

NFC is the same wireless chip you use to pay with your phone at the checkout. The software writes your card's public address to a blank NFC sticker or plastic card. When you hold it against the other person's phone, the phone offers to open that address, with no app and no camera. A basic NTAG213 sticker is enough for a card address; an NTAG215 works the same way.

### How do you write a card from an Android phone?

1. On an Android phone, in the Chrome or Samsung Internet browser, open the portal and the *NFC cards* item.
2. Next to the card you want to write, tap *Write to NFC*.
3. When the message "Hold the NFC sticker against the top of your phone..." appears, hold the sticker against the back of the phone, near the top, and keep it still.
4. The message "Written! Hold the card against someone else's phone to check." means the write succeeded. Check it with another phone before you hand the card over.

If you get the message "Writing failed." with a description of the error, repeat the write and keep the sticker still until the confirmation appears.

### How do you write from an iPhone or a computer?

Writing from the browser works only on Android; on other devices, the portal tells you so. On an iPhone, install the free app “NFC TagWriter by NXP”, choose to write a new record of the Link (URL) type, paste the address from the *Card address (for manual writing):* field and hold the sticker against the phone. On a computer, just copy the address and write it with a phone.

**Who sees which cards?**

The Administrator and the Card Manager see all of the company's published cards, so they can write NFC cards for all employees themselves. Employees and team members see only their own cards. The list is sorted by card name and shows at most 500 of the company's cards, or 20 of your own cards.

**Options**

**Show the NFC section (to you and your employees)** Default: on · changed by the Administrator only

When you turn it off and click *Save*, the *NFC cards* item disappears from the portal menu for everyone except the Administrator, and the tile disappears from Home for everyone. The Administrator can still open the page, but instead of the card list sees the message “The NFC section is currently hidden. Turn it on below.”: to write a new card, the Administrator first turns the section back on. Stickers that have already been written keep working, because all they hold is the card address.

**Example:** a company orders branded NFC cards, the Administrator writes them for all employees personally and then hides the section, so that nobody accidentally writes a different address over an existing one.

**Watch out:** the sticker stores the site address as it is at the moment of writing. If you later change the domain or switch from http:// to https://, you have to write the stickers again. So before writing, check that both addresses in WordPress Settings → General start with https://; while the site address starts with http://, the NFC cards page warns you about it. For an http:// address, the phone shows a warning that the connection is not secure.

**Branded NFC cards:** plastic NFC cards with your logo and design are written the same way. NFC and a QR code can sit on the same card, so the other person can choose whichever is more convenient.

REAL-WORLD EXAMPLE

A sales representative for a building materials distributor visits construction sites and never has time to hand out paper business cards. The Administrator writes an NFC card with the company logo for him from the portal. At a meeting, the sales rep holds the card against the site foreman's phone, the card opens within a second, and with a tap on *Save contact* the foreman has his number, without dictating it and without typos.

## 30. Google Wallet

**Where:** QR vCard Pro → Google Wallet (*Connection* and *Guide* tabs); on the portal: *Google Wallet*; a button on the public card

**Who:** set up by the Administrator only; while the feature is active, all portal users add their own cards

**Plan:** all plans

> Want your business card to sit in Google Wallet on the phone, next to boarding passes and loyalty cards, and want anyone who opens your card to be able to save it there? Connect the company's issuer account once, and the “Add to Google Wallet” button appears on the portal and on public cards.

Google Wallet is the phone app for digital cards. For each card, the software creates a so-called pass, a digital card that is stored in the wallet. The company presents itself to Google as the issuer: the Administrator enters the issuer account and service account details once, and employees enter nothing. The pass carries only contact details, nothing financial, and has nothing to do with the payment cards in the wallet.

**What does the pass contain?**

- Title: the company name from the card, or, if there is none, “Business card”.
- The name (if there is none, “Contact”) with the position below it.
- The fields “Phone”, “Email” and “Company”, with the first phone number and the first email from the card.
- A QR code that leads to the card's public address, and the link “Open business card”.
- The background color and logo from Branding (see Branding), the same for all passes, not the color and logo of the individual card.

### Step 1: how do you create the issuer account?

1. Open the Google Pay & Wallet Console at `pay.google.com/business/console` and sign in with the company's Google account.
2. Activate the Google Wallet API and create an Issuer.
3. Copy the Issuer ID, the issuer number you will enter in the software.

### Step 2: how do you create the service account?

1. In the Google Cloud Console, in the same project, open IAM & Admin → Service Accounts.
2. Create a service account and give it access to the Google Wallet API; the instructions in the software name the Wallet Object Issuer role.
3. Link the service account to the issuer in the Wallet Console by adding its email address as a user of the issuer account.
4. Create a key of the JSON type for the service account and download the file. It contains the values “client_email” and “private_key”. Guard the file like a password.

### Step 3: how do you enter the details in the software?

1. Open QR vCard Pro → Google Wallet, *Connection* tab, or on the portal *Google Wallet*, section *Settings (administrator)*.
2. Enter the *Issuer ID*, paste the “client_email” value into *Service account email*, and paste the entire “private_key” value, with the BEGIN and END lines, into *Service account private key*.
3. Click *Save settings*; the confirmation is “Settings saved.”
4. In the *Test* box, click *Test key*. The message “The details are correct. The "Add to Google Wallet" button is ready.” means the key was entered correctly.
5. Turn on *Enable Google Wallet pass* and click *Save settings* again. The status box now shows *Active*.
6. Open one of the public cards on an Android phone, tap *Add to Google Wallet* and check the pass in the wallet.

Steps 1 and 2 are also described on the *Guide* tab in wp-admin; on the portal, the *Open the guide* → link leads to it. Above the form there is also the explanation “Whose details do I enter here? (important)”: the details belong to the company and are entered only once.

**Options**

**Enable Google Wallet pass** Default: off

The main switch. The feature becomes active only when this switch is on, the Issuer ID, Service account email and Service account private key fields are filled in, and the server has the OpenSSL PHP extension. Then all portal users see the *Google Wallet* item, and public cards show the button if the next option is also on.

**Example:** turn on the switch only after you have entered and tested all the details; if you notice a problem with the passes, turn it off and the button disappears from all cards immediately, until you fix the problem.

**Show the "Add to Google Wallet" button on the public card** Default: on

Shows the button on all public cards, right below the button for saving the contact. The setting applies to all cards; it cannot be chosen per card. When you turn it off, visitors do not see the button, while portal users can still add their own cards from the portal.

**Example:** you want only employees to use passes, to show their card in meetings, and visitors to save only the contact; turn this option off.

**Issuer ID** Default: empty

The issuer number from the Google Pay & Wallet Console (the format is shown in the field: 3388000000022xxxxxx). It determines in whose name the passes are issued.

**Example:** you copy the number from the console and paste it without spaces at the beginning or end.

**Service account email** Default: empty

The “client_email” value from the service account JSON file, in the form name@project.iam.gserviceaccount.com.

**Example:** you open the downloaded JSON file in a text editor and copy the address that follows “client_email”, without the quotation marks.

**Service account private key** Default: empty

The “private_key” value from the same file, in full, with the BEGIN and END lines. If you paste it exactly as it appears in the file, with `\n` markers instead of line breaks, the software converts them itself. The key is stored and used only for signing passes. After the first save the field is empty, with the hint “saved; leave empty to keep it”: an empty field keeps the stored key when you save, and to replace the key you simply paste the new one.

**Example:** your IT department creates a new service account key once a year; you paste it here, save, run *Test key*, and then delete the old key in Google Cloud.

**Class suffix (advanced)** Default: qrvpcardclass

The name of the pass class at Google to which all your business cards belong. Letters, numbers, the period, the underscore and the hyphen are allowed; an empty field restores the default name. Leave the default unless you know why you are changing it.

**Example:** your developer has already created a class with that name in the same issuer account for other passes; enter a different name, for example businesscards, so that your business cards are not tied to that class.

**What does Test key check, and what do the statuses mean?**

The *Test key* button checks only on your server: whether the server has OpenSSL, whether all three fields are filled in and whether the key can be read. The possible messages are “The OpenSSL PHP extension is not available on this server (required for signing).”, “Fill in the Issuer ID, service account email and private key.”, “The private key is not valid. Paste the entire "private_key" from the service account JSON file (including the BEGIN/END lines).” and, when everything is in order, the message about correct details. The test does not contact Google, so it does not check the Issuer ID or the link between the service account and the issuer.

The status box shows one of four states: *OpenSSL is not available* (contact your hosting provider), *Active*, *Configured but disabled* (turn on the switch) or *Not set up* (enter the issuer details).

**What do portal users and visitors see?**

- **Portal users**, while the feature is active, see an explanation on the *Google Wallet* page and the *Save your card to your wallet* section with their published cards (up to 20), each with an *Add to Google Wallet* button. Unlike NFC cards, here even the Administrator and the Card Manager see only their own cards: everyone adds their own card, from their own phone.
- **While the feature is not active**, other users do not have the menu item, and the Administrator sees the message “This feature is not enabled yet. Set it up below, and the button will appear both here and (optionally) on public cards.” along with the settings.
- **Visitors to the public card** see the *Add to Google Wallet* button; tapping it opens Google's page for saving the pass to their wallet.

**Watch out:** the software does not send Google changes to passes that have already been saved, so do not count on the details in someone else's wallet updating by themselves when you edit the card. The QR code and the link on the pass always open your card, where the details are current. The instructions in the software also state that until the issuer is granted production access (requested in the Wallet Console), passes carry the “[TEST ONLY]” label and work only for test users; this is Google's rule, so check the issuer status in the console before wider use.

**Apple Wallet:** the software creates only Google Wallet passes; Apple Wallet is not supported. iPhone owners save your card with the *Save contact* button on the public card.

REAL-WORLD EXAMPLE

A real estate agency wants clients to find its agents easily after an apartment viewing. The Administrator connects the issuer account once, and the agents add their own cards to the wallet on the portal. At a viewing, the client scans the QR code on the agent's card and taps *Add to Google Wallet*; a week later, when they decide to get in touch, they find the agent's card in their wallet, not in a pile of saved links.

## 31. AI assistant

**Where:** QR vCard Pro → AI assistant; on the portal: *AI assistant*

**Who:** all portal users while it is turned on; the Administrator always; the switch and the OpenAI key: Administrator only

**Plan:** all plans (an OpenAI key is required)

> Not sure what to write in your card's description, or how to follow up with someone you met at a trade fair? Within a few seconds, the AI assistant suggests a bio, a tagline or a follow-up message, and you copy the text and polish it.

The assistant has three tools: *Card bio*, *Headline (tagline)* and *Follow-up message*. The text is written by OpenAI's gpt-4o-mini model, through the same OpenAI key the software uses for automatic card translation. The result is never inserted anywhere automatically: it appears in the field below the tool, from where you copy it with the *Copy* button (confirmation “Copied ✓”) and paste it into the card, an email or a message. The software prefills the name, position and company fields with the details from your most recently published card. While the assistant is writing, the button shows “Generating…”.

### How do you create a card bio?

1. Open *AI assistant* on the portal or in wp-admin.
2. In the *Card bio* tool, check the *First name*, *Position* and *Company* fields; at least one of them must be filled in (“Fill in at least the name or the position.”).
3. Choose *Tone*, *Length* and *Language* and click *Generate bio*.
4. Read the suggestion, click *Copy* and paste the text into the bio field on the card (see Profile and details). If the suggestion does not suit you, click again: you get a new suggestion every time.

### Options

**Card bio: Tone** Default: Professional

*Professional* produces confident business text, *Friendly* a warmer and more approachable one, and *Concise* a short, factual one. The bio is written in the first person, and the model's instructions limit it to the details you provided.

**Example:** a dentist chooses *Friendly*, so that patients sense from the description that there is nothing to fear at his practice.

**Length** Default: Medium

*Medium* produces two to four sentences, and *Short* one to two.

**Example:** on a card with a lot of content you choose *Short*, so that the description does not push the contact buttons down.

**Language** Default: the language the software is shown in (if it is on the list), otherwise Serbian

Available in all three tools: Serbian, English, Deutsch, Français, Español, Italiano, Русский, Hrvatski, Slovenščina, 日本語 and 简体中文. Serbian text is written in Latin script.

**Example:** an exporter creates the same bio in English and in German and enters both in a multilingual card (see Multilingual cards).

**Headline (tagline)**

A tool with the *Position*, *Company*, *First name* and *Language* fields and the *Generate headline* button. It writes a short tagline, up to about eight words, for the line below the name on the card. At least one field must be filled in ("Fill in at least the position or the company.").

**Example:** for the position "Web developer" you get a suggestion like "Web developer who turns ideas into websites" and enter it in the tagline field on the card.

**Follow-up message**

A tool with the *Contact name*, *Your name*, *Your company*, *Channel*, *Tone*, *Language* and *Where you met / what you talked about* fields and the *Generate message* button. It writes a short message after a meeting: a thank-you and a clear proposal for the next step.

**Example:** after a meeting with a hotel's purchasing department, you enter the buyer's name and "agreed on a trial delivery of bed linen", and you get a draft message that you only need to polish.

**Channel** Default: Email

*Email* produces a message whose first line starts with "Subject: " ("Naslov: " when the language is Serbian or Croatian), followed by a blank line and the message body. *Message (SMS/WhatsApp)* produces two to four sentences, without a subject line.

**Example:** the person you met at a trade fair left you only a phone number, so you choose *Message (SMS/WhatsApp)*.

**Follow-up message: Tone** Default: Professional

*Professional* produces a courteous business message, and *Friendly* a warmer and more direct one.

**Example:** for the director of a large company you choose *Professional*, and for a café owner you hit it off with right away, *Friendly*.

**Where you met / what you talked about** Default: empty

A short description of the meeting, for example as in the field: “e.g. met at a business fair, interested in a new website”. The more specific the description, the more personal the message; without a description, the message is generic.

**Example:** “construction trade fair, asked about the price of EPS facade insulation board for 300 m²”.

**Show the AI assistant to all portal users (managers and employees)** Default: on · changed by the Administrator only

The switch is in the *Settings (administrator)* section, with the note “The AI uses your existing OpenAI key. Each call uses some OpenAI credit (very little with gpt-4o-mini).”; it is saved with the *Save* button (confirmation “Saved.”). When you turn it off, the tools stop working for everyone: other users no longer have the menu item, the Administrator sees only the message “The AI assistant is currently hidden. Turn it on below.” and the switch on the page, and every request is rejected with the message “The AI assistant is disabled.”

**Example:** the company first wants to estimate the OpenAI cost; the switch stays off until management decides to roll the assistant out to the whole team.

### How do you set up the OpenAI key?

Only the Administrator enters the key, once for the whole site; employees neither see it nor enter it. Until a key is set, the AI assistant shows “The OpenAI key is not set. The AI assistant uses the same OpenAI key as translations. Add it once and all tools will work.”, and the Administrator also sees the *Set up key* → link.

1. On platform.openai.com, sign in with the company's OpenAI account and open the API keys page; the “Create an API key on OpenAI” link below the key field also leads there.
2. Create a new key and copy it right away, because OpenAI does not show it again in full afterward.
3. Open QR vCard Pro → Settings → *Lead Capture*, or on the portal *Settings* → *Lead Capture*, and find the 🌐 *Multilingual support* section.
4. Paste the key into the *OpenAI API Key* field. In wp-admin you can check it before saving with the *Check key* button.
5. Click *Save changes*.

OpenAI charges for usage according to its own pricing and terms, so billing must be set up on the OpenAI account. The same key is also used by automatic translation (see Portal language, card language and automatic translation).

**Watch out:** the explanation in the software says the assistant “is free to use”: this means the software does not charge anything extra, but OpenAI bills every call to the key owner, including when an employee uses the tool. If you do not want that cost for the whole team, turn off the switch. A single user can send at most 20 requests per minute (“Too many requests. Please wait a few seconds.”), and a response is awaited for at most 45 seconds; errors returned by OpenAI are shown with the “OpenAI:” prefix. Everything you enter in the fields is sent to OpenAI, so do not enter confidential client information in the meeting description. Always read the text before publishing or sending it: it may contain a mistake or a sentence that does not sound like you.

**REAL-WORLD EXAMPLE**

A hospitality equipment salesperson talks to some fifteen café owners at a regional trade fair. In the evening, on the portal, he opens the *Follow-up message* tool for each of them, enters the name and one sentence about the conversation, and chooses *Message (SMS/WhatsApp)* and the *Friendly* tone. Within a few minutes he has fifteen messages with a thank-you and a proposed next step, which he polishes and sends the same evening, while the people he met still remember the conversation.

# 32. Marketing module and Google reports

**Where:** QR vCard Pro → Marketing; on the portal: *Marketing*

**Who:** the reports are visible to the Administrator, Card Manager, Employees and Team members while the module is enabled; only the administrator changes the Google connection and all settings

**Plan:** all plans

> Want to see how many people visit your website, where they come from and which words they use to find you on Google, without opening Google's own tools? Connect the Marketing module to Google Analytics and Search Console: you connect once, and the reports then refresh on their own.

The Marketing module brings together tools for attracting and tracking contacts. This chapter covers the *View* tab, with reports from two Google services, and how to connect to them. Google Analytics 4 (GA4 from here on) measures visits to your website, and Google Search Console shows how the site appears in Google Search. The software only reads this data, through a service account: a separate Google account intended for applications, which gets read access and nothing more. It shows the numbers in summary form, in plain language, with a short explanation under each one.

### Which tabs are there, and who sees them?

| Tab | What it contains | Who sees it |
|---|---|---|
| ***View*** | Reports from GA4 and Search Console; on the portal, the administrator also has the “Connection” form below them | everyone with access to the module |
| ***Campaigns*** | Campaign links and QR codes, conversion funnel (Campaigns and conversion funnel) | everyone with access to the module |
| ***Pixels*** | Ad pixels and the consent rule (Retargeting pixels) | administrator only |
| ***Reviews*** | Google reviews and private feedback (Google reviews) | administrator only |
| ***Follow-up*** | An automatic message after someone leaves their contact details (Automatic follow-up) | administrator only |
| ***Pages*** | Pages at the /l/ address (Pages /l/: link hub and lead magnet landing page) | administrator only |
| ***SEO*** | Cards appearing in search (SEO and search visibility) | administrator only |
| ***Connection*** | Details for the Google connection and test buttons; exists only in wp-admin | administrator only |
| ***Help*** | Instructions for connecting Google, with an example and frequently asked questions | everyone with access to the module |

In wp-admin, the module is in practice used by the administrator. An administrator who has not yet entered the service account lands directly on the *Connection* tab when opening Marketing. The portal has no Connection tab: the same form sits at the bottom of the *View* tab, under the heading “Connection”, and only the administrator sees it. The Campaigns, Pixels, Reviews, Follow-up, Pages and SEO tabs each have their own instructions with an example at the bottom of the screen.

On the portal, the Card Manager, Employees and Team members see the *Marketing* menu item only while the *Enable the Marketing module (show it to the company)* option is on; the administrator always sees it. Other users cannot open the tabs intended for the administrator, and only the administrator may save any settings in the module.

### What do you need before connecting?

- The company Google account you use to access Google Analytics and Search Console, with permission to add new users in them.
- A GA4 property for your website, the site added to Search Console, or both. One service is enough: the View tab shows a section only for the one that is set up.
- A computer with a browser and about ten minutes. You only need to connect once.

### How do you connect Google, step by step?

1. Open `console.cloud.google.com`, sign in with the company Google account and create a new project at the top of the screen, for example “Marketing reports”. The project is only a container for the service account.
2. In the search field inside Google Cloud, find “Google Analytics Data API” and “Google Search Console API”, and click *Enable* on the page of each one. Without these two APIs enabled, Google refuses to let the reports be read.
3. Open IAM & Admin → Service Accounts → Create service account, enter a name for the account, for example “qrvp-reader”, and save. No additional roles are needed in Google Cloud.
4. Open the service account you created, then Keys → Add key → Create new key → JSON → Create. The browser downloads a small JSON file. Protect it like a password: anyone who has this file can read your reports.
5. Open the JSON file in Notepad or another plain-text editor. Paste the value of the “client_email” field into the *Service account email* field, and the value of the “private_key” field into the *Service account private key* field: all of it, from `-----BEGIN PRIVATE KEY-----` to `-----END PRIVATE KEY-----`. You can leave the `\n` markers from the JSON file in place; the software converts them into line breaks itself.
6. Give the service account read access in Google Analytics: in GA4, open Admin → Property access management, click the button for adding users (Add users), paste the service account email and assign the “Viewer” role. In the same Admin menu, open Property settings and copy the number from the Property ID field into the *GA4 Property ID* field.
7. Give it read access in Search Console: Settings → Users and permissions → Add user, paste the same email and choose the “Full” or “Restricted” permission. In the *Search Console site address* field, enter the property exactly as Search Console shows it (details are in the options below).
8. Click *Save*, then *Test GA4 connection* and *Test Search Console connection*. In wp-admin, these buttons are below the form on the Connection tab; on the portal, they are below the form at the bottom of the View tab. The message “The connection to Google Analytics works. Data is available.” (or “The connection to Search Console works. Data is available.”) means everything is set up correctly.
9. Check the numbers on the *View* tab in wp-admin, then turn on *Enable the Marketing module (show it to the company)* and save again. On the portal, the reports appear only while the module is enabled; until then, the administrator sees there, below the introductory text, a message that the module is disabled, followed by the connection form.

### Options

**Enable the Marketing module (show it to the company)** Default: off

The module's main switch. When it is on, the *Marketing* item appears in the portal menu for all portal users, who then see the company's reports and the Campaigns tab, and the public cards start loading the measurement code from the “Advanced” section (if you have entered a measurement ID). When it is off, other users do not see the module in the menu and the measurement code is not loaded on any card, while the administrator can still configure all tabs and sees the reports in wp-admin.

**Example:** the administrator connects Google while the module is off, checks the numbers in wp-admin for a few days and only then turns the module on, so employees do not look at incomplete reports.

**Service account email** Default: empty

The service account address from the “client_email” field of the JSON file, in the form `name@project.iam.gserviceaccount.com`. The software uses it together with the private key to identify itself to Google, and you add the same address as a user in GA4 and in Search Console. The address format is not checked when you save, so copy it from the file instead of retyping it.

**Example:** `qrvp-reader@marketing-reports.iam.gserviceaccount.com`.

**Service account private key** Default: empty

The value of the “private_key” field from the same JSON file, including the first and last lines. It is used only to sign the requests through which the software reads the reports. If only part of the key was pasted, the report and the test show “The private key is not valid.” along with an instruction to paste the entire “private_key”.

**Example:** if you left out the last line when copying, open the JSON file again, select the entire value between the quotation marks after “private_key” and paste it over the current content of the field.

**GA4 Property ID** Default: empty

The number of the GA4 property whose reports you read (in GA4: Admin → Property settings). Only digits are kept when you save. Next to the field, the status reads “ready” when both the service account and the number are entered, and “not set up” otherwise. While the field is empty, the Google Analytics section is not shown. Do not confuse it with the measurement ID that starts with G-: that one goes into a separate field in the “Advanced” section.

**Example:** `401122334`.

**Search Console site address** Default: empty

The Search Console property, entered exactly as it appears there. For a Domain property, the format is `sc-domain:yourdomain.com`; for a URL prefix property, it is the full address with a trailing slash, for example `https://yourdomain.com/`. Next to the field, the same status is shown as for GA4. If the entry does not match the property, the Search Console section reports an error.

**Example:** a law firm whose site was added to Search Console as a Domain property enters `sc-domain:examplelawfirm.com`.

**GA4 measurement ID (G-XXXX)**

Default: empty · in the "Advanced: also measure visits to the QR cards themselves (optional)" section

The Measurement ID of your website's data stream, which you find in Google Analytics in the data stream settings (Data streams) and which starts with G-. When it is entered and the module is enabled, Google's measurement code is added to the header of every public card (/q/...), so card visits are recorded in the same GA4 property as visits to the website. Only the standard page view is sent, without separate events such as saving the contact. The code is not added to /l/ pages or to the review page. A value that does not start with G- or contains characters other than letters and digits is not saved: the field stays empty after saving, with no error message.

**Example:** you enter `G-5ABC123XYZ`, and in the GA4 pages report, alongside your website's pages, you also see card addresses that start with /q/.

**GTM container (GTM-XXXX)**

Default: empty · in the "Advanced: also measure visits to the QR cards themselves (optional)" section

The container ID from Google Tag Manager, which starts with GTM- and is shown in Tag Manager next to the container name. When it is entered, the container code is added to the public cards (without the fallback for browsers with JavaScript turned off), and you configure all further tags in Tag Manager itself. As with the measurement ID, a value in the wrong format is silently deleted. Both fields can be filled in at the same time.

**Example:** an agency that already manages a client's tags through Tag Manager enters `GTM-ABC1234` and later adds new tags without any changes in the software.

**Note:** the measurement code on the cards follows the consent rule from the *Pixels* tab. While the *Require visitor consent before loading the codes (recommended, GDPR)* option is on, which is the default, the code loads only after the visitor clicks "Accept" on the banner. GA4 therefore sees only visits from people who accepted cookies. The rule is described in the chapter Retargeting pixels.

### What do the reports show?

At the top of the *View* tab, you choose the period: "7 days", "28 days" or "90 days" (28 by default). The period is counted back from today and includes today.

- **"Your website (Google Analytics)"**: four numbers, *Visitors* (how many different people), *Visits* (the number of sessions), *Page views* and *Engagement* (the share of visits in which people actually did something, as a percentage). Below them are the "Visitors over time" chart, by day, then "Where they come from", with the six

channels that bring the most visits (search, direct, social networks, email and so on), and “Most visited pages”, with the eight most frequently opened pages.

- **“You in Google Search (Search Console)”**: *Impressions* (how many times you appeared in the results), *Clicks*, *CTR* (the share of impressions that turn into a click) and *Average position* (a lower number is better). Below them are the tables “What people search for”, with ten terms people type into Google, and “Pages in search”, with ten of your pages from the results, both with the columns Query / page, Clicks, Impressions and Pos.

**How fresh is the data?**

Successfully loaded data is kept for three hours, so the screen opens quickly; the bottom of the screen says so too: “Data refreshes automatically every 3 hours. Search Console shows data with a delay of 1 to 2 days (that is how Google works).” The last few days in Search Console are therefore always incomplete. Next to the period selector, the administrator has a ↻ *Refresh data* button, which clears the stored data for all users and loads fresh data right away; the same happens every time the settings are saved. Errors are not stored, so after you correct the settings, the report tries again immediately.

**What if a report shows an error?**

A section that cannot be loaded shows “Unable to load the data.”, the reason returned by Google and a tip: “Most common cause: the service account has not been added as a user on the property, or the Property ID / site address is wrong.” Check, in this order:

- whether the service account email has been added as a user in both GA4 and Search Console (steps 6 and 7);
- whether the GA4 Property ID field contains the property number, not the measurement ID with G-;
- whether the property in the Search Console field is entered exactly as it appears in Search Console;
- whether both APIs are enabled in the Google Cloud project (step 2);
- if the message says that OpenSSL is not available on the server, ask your hosting provider to enable the OpenSSL PHP extension, which is required for the signature.

Until the connection is set up, a user who is not an administrator sees “The connection is set up by your company administrator.” instead of the reports.

**Watch out:** after saving, the private key stays in the form field and is visible to anyone who opens that screen as an administrator, both in wp-admin and on the portal. Do not take screenshots of that form, and do not share the administrator account. If you suspect the key has been exposed, delete that service account key in Google Cloud, create a new one and paste it here.

**Watch out:** GA4 reports cover the whole property, that is, the whole website, not just the cards; card visits are included only once you also enter the same G- ID in the *GA4 measurement ID (G-XXXX)* field. The measurement code on the cards works only while the module is enabled, and an enabled module also shows the website reports to all portal users, including employees. If the website data is not meant for everyone, track card visits through Analytics: what is measured and where to see it, without enabling the module.

**Note:** if your GTM container already contains a GA4 tag for the same property, do not also enter the GA4 measurement ID, because every card visit would be counted twice.

REAL-WORLD EXAMPLE

A dental practice has a website and five cards for its dentists. One afternoon, the administrator creates a service account, adds it to GA4 and Search Console and connects the module. On the View tab, the administrator sees that people most often find the practice by searching for “dental implants” together with the name of their city, and that most visits come from search, so the practice focuses its website content on that service. After also entering the measurement ID, the administrator sees in the same GA4 account how many patients open the dentists' cards after visiting the practice.

## 33. Campaigns and conversion funnel

**Where:** QR vCard Pro → Marketing → Campaigns; on the portal: *Marketing → Campaigns*

**Who:** all users with access to the Marketing module; the Administrator and Card Manager work with all of the company's cards, Employees and Team members only with their own

**Plan:** all plans

> You share the same card at a trade fair, on a flyer and on Instagram, but do not know which channel actually brings in contacts? Create a separate link and QR code for each channel: the conversion funnel then shows scans, interactions and contacts for each channel separately.

A campaign link leads to the same card, with the same content. The difference is three tags added to the end of the address, called UTM parameters: source, medium and campaign. The software stores these tags with every scan and every contact, so you can compare the channels later. The tab works right away, without any external connection and independently of the Google reports from the chapter Marketing module and Google reports.

Example of a campaign link: `https://yourdomain.com/q/ab12cd?utm_source=tradefair&utm_medium=flyer&utm_campaign=spring-fair-2026`.

### How do you create a campaign link and QR code?

1. Open the *Campaigns* tab and, in the “Create a campaign link and QR code” section, select a card in the *Card* field.
2. Fill in *Source (utm_source)*, *Medium (utm_medium)* and *Campaign (utm_campaign)*. The link is assembled as you type, and the *Generate link and QR code* button displays it immediately.
3. Under the heading “Your campaign link”, click *Copy* to copy the link, or *Download QR (PNG)* to download the QR code image (the file `qr-kampanja.png`, 220 × 220 pixels).
4. Place the link or QR code where the channel happens: the QR code on a flyer, a booth or a shop window, and the link in your Instagram bio, your email signature or a newsletter.

**Note:** the QR code is generated in your browser and is not saved anywhere, and the software does not keep a list of the campaign links you create. Write down the links and campaign names, for example in a spreadsheet, so you can reuse them later and keep the spelling consistent.

**Options**

**Card** Default: the first card alphabetically

A list of published cards (up to 200), sorted by name. The Administrator and Card Manager can choose any of the company's cards, Employees and Team members only their own. The link starts with the public address of the selected card. If there are no published cards, the form is replaced by “You don't have any published cards. Create a card, then come back here.”

**Example:** before a trade fair, the sales manager creates three QR codes with the same campaign, one for the card of each sales rep at the booth.

**Source (utm_source)** Default: empty

Where the visitor saw the link: a place, a platform or a publication. The “By source” table is built from this value. An empty field is not added to the link. The software stores up to 120 characters.

**Example:** `tradefair`, `instagram`, `newsletter`, `window`.

**Medium (utm_medium)** Default: empty

The type of channel. It is stored with every scan and contact, but the funnel has no separate table by medium; use it to keep your tags consistent and readable when you review them later.

**Example:** `qr`, `flyer`, `social`, `email`.

**Campaign (utm_campaign)** Default: empty

The name of a specific promotion. The “By campaign” table is built from this value, and it is the most useful one for comparing promotions.

**Example:** `spring-fair-2026`, `fall-sale`, `store-opening`.

**Funnel period: “7 days” / “28 days” / “90 days”** Default: 28 days

The time range for the funnel's numbers, bars and tables. No other values are available.

**Example:** a week after a three-day trade fair, you choose “7 days” and see only the week of the fair.

**How do you choose good values?**

- Write in lowercase, without spaces, and join words with a hyphen (`spring-fair`). Accented letters such as é, ü or č work, but it is better to avoid them, because they appear as encoded characters in the link.
- Always write the same channel the same way: for the funnel, `instagram` and `insta` are two different tags.
- The source says where, the medium says how, and the campaign says why or when.

| Channel | Source | Medium | Campaign |
|---|---|---|---|
| **Flyer at the spring trade fair** | tradefair | flyer | spring-fair-2026 |
| **Link in your Instagram bio** | instagram | social | profile |
| **October newsletter** | newsletter | email | october-2026 |
| **QR code in the shop window** | window | qr | downtown-store |
| **Salesperson's email signature** | signature | email | sales-signature |

**How does a campaign follow the visitor all the way to a contact?**

When someone opens any public page of your website through an address with the utm_source, utm_medium or utm_campaign tags, the software stores these values in the `qrvp_utm` cookie in their browser for 30 days. A card scan and a contact get their tags from the address itself or, if the address has none, from the cookie. That is why a contact the visitor leaves later, for example when they open the card again two days later without the campaign link, is still recorded under the campaign that brought them the first time. A new visit with different tags overwrites all three stored values. The cookie applies only in the browser in which the link was opened: if the same person gets in touch later from another device, their contact is recorded as direct.

**What does the funnel show?**

In the “Conversion funnel” section, you choose the period and then see four numbers and bars that compare them:

- **Scans**: openings of public cards in the period.
- **Interactions**: all recorded actions except the card opening itself, that is, saving the contact and clicks on the phone, email, website, social networks and map.
- **Contacts**: all contacts received in the period.
- **Conversion rate**: contacts divided by scans, times 100.

Below are the “By campaign”, “By source” and “By card” tables, with the columns Label, Scans, Contacts and Rate. Each table shows up to 15 labels with the most scans and, in addition, labels that have only contacts. Scans and contacts without tags are listed as “(direct / untagged)”, and a card that has since been deleted as “(deleted card)” with its number. The Administrator and Card Manager see the numbers for the whole site, Employees and Team members only for their own cards.

> **Watch out:** the cookie with the tags is set on any public page of the site, not just on a card. A visitor who came to the company website through a newsletter and then, within the next 30 days, scans a plain QR code from a card will be recorded under the newsletter campaign. If your website also uses UTM tags, choose clearly distinct campaign names for the cards and interpret the tables with that in mind.

**Watch out:** “Contacts” counts all contacts from the period, including those entered with the paper business card scanner, through the API and through /l/ pages, while openings of /l/ pages are not counted as scans. The overall conversion rate can therefore be higher than the real one. Compare the channels with each other in the tables by campaign and by source, and look at contacts by source in the chapter Contacts: overview, tags, notes and export. Submitting the contact exchange form is also recorded as saving the contact, so the same action also appears among the interactions.

**Note:** the `qrvp_utm` cookie does not depend on the consent rule from the Pixels tab. If your website's privacy policy lists cookies, include this one as well (campaign tags, 30 days). If the “By campaign” and “By source” tables stay empty even though there are scans, the database update may not have finished; see License status, conflicts and diagnostics.

REAL-WORLD EXAMPLE

An IT company exhibits at a trade fair and runs a LinkedIn ad at the same time. For the same card, the sales manager creates two links: for the flyer, source `tradefair`, medium `flyer` and campaign `tech-fair-2026`; for the ad, source `linkedin`, medium `social` and the same campaign. Two weeks later, the “By source” table shows how many scans and contacts the flyer brought in and how many the ad did, so for the next fair the manager knows where to invest more.

## 34. Retargeting pixels

**Where:** QR vCard Pro → Marketing → Pixels; on the portal: *Marketing → Pixels* | **Who:** administrator only | **Plan:** all plans

> Want to show an ad on Instagram, Google or LinkedIn later to people who opened your card but never got in touch? Enter the IDs of your ad pixels: the software adds them to the public cards, together with a built-in visitor consent banner.

A pixel is a short piece of code from an ad platform. When it loads on a card, the platform records the visit and builds an audience from the recorded visitors, which you can later show ads to; this is called retargeting. The software does not create audiences or ads; it only adds the standard pixel code to the header of the public card. You set up the audience and the campaign in your ad account. One set of IDs applies to the whole site, that is, to all cards.

### How do you set up the pixels?

1. Find the pixel ID in your ad account; where to find it is described with each field in the options below.
2. On the *Pixels* tab, turn on *Enable retargeting pixels (add the code to cards)* and paste the IDs only for the platforms you use. Leave the other fields empty.
3. Leave *Require visitor consent before loading the codes (recommended, GDPR)* on and click *Save*. The message “Pixels saved. They are active on the public card pages.” confirms that the settings were saved.
4. Open one of your cards in a private browser window. You should see the consent banner; click “Accept”, then check in your ad account whether the pixel records the visit.

5. Create a visitor audience in your ad account. If you also use the same pixel on your website and the platform allows it, limit the audience to addresses that contain `/q/`, so that it includes only card visitors.

**Options**

**Enable retargeting pixels (add the code to cards)** Default: off

The main switch. While it is off, no pixel is added, regardless of the IDs entered, which stay saved.

**Example:** during a break in advertising, turn the switch off; when you resume the campaign, simply turn it back on.

**Meta Pixel ID (Facebook / Instagram)** Default: empty

The pixel ID from Meta Events Manager (Data Sources → your pixel → ID, 15 to 16 digits). Only digits are kept when you save. The card loads the base Meta code with the page view event (PageView).

**Example:** you enter `1234567890123456`, and a few days later you create an audience in Meta of people who opened the cards and show them an ad on Instagram.

**Google Ads ID (AW-XXXX)** Default: empty

The Google tag ID from your Google Ads account (Tools → Google tag), which starts with "AW-". The card loads the base Google tag with that ID, which records the visit. A value that does not start with AW- or contains characters other than letters and digits is not saved: the field stays empty, with no error message.

**Example:** `AW-123456789`, so you can show ads on the Google network to card visitors.

**LinkedIn Partner ID** Default: empty

The number from LinkedIn Campaign Manager (Account Assets → Insight Tag → Partner ID). Only digits are kept when you save. The card loads the LinkedIn Insight Tag.

**Example:** an IT company enters `1234567`, builds an audience of executives who opened its salespeople's cards and shows them a case study.

**Require visitor consent before loading the codes (recommended, GDPR)** Default: on

While it is on, no code that uses cookies is loaded until the visitor accepts in the banner. The rule applies to all such codes on the card: to these pixels, and also to the GA4 and Tag Manager code from the chapter Marketing module and Google reports. When you turn it off, all codes load immediately, without the banner.

**Example:** leave it on. Turn it off only when the company, on legal advice, has a different legal basis and its own way of collecting consent, because the company that uses the codes is responsible for the legal basis.

**What is sent to the platforms?**

The card loads only the base code of each platform, which records the page visit: the PageView event for the Meta pixel, the base tag with your AW- ID for Google Ads, and the Insight Tag for LinkedIn. Separate conversion events,

for example “left contact details”, are not sent, so you build audiences from visitors, not from the people who left their contact details. The codes exist only on public cards (/q/...), not on /l/ pages or on the review page.

**How does the consent banner work?**

The banner appears on a public card when three conditions are met: the consent rule is on; the card has at least one code (the Marketing module enabled with a G- or GTM- ID, or pixels enabled with at least one ID); and the visitor has not yet made a choice. The banner text reads “This page uses cookies for analytics and advertising. You can accept or decline. Without your consent, none of it is loaded.” and it has two buttons, “Decline” and “Accept”.

The choice is stored in the `qrvp_consent` cookie in the visitor's browser for one year. “Accept” reloads the page, and only then are the codes loaded; “Decline” just hides the banner, and nothing is loaded. How the banner looks to the visitor is described in the chapter The public card: what visitors see and can do, and the other privacy settings in the chapter Privacy and GDPR.

**Watch out:** the card has no button the visitor could use to change their choice later, so the choice applies for a year. Anyone who wants to withdraw consent can delete your website's cookies in their browser, after which the banner appears again. State this in your privacy policy, together with the `qrvp_consent` cookie and the cookies of the platforms whose pixels you use.

**Watch out:** the software does not report an incorrectly entered ID. A Google Ads ID in the wrong format is deleted, and everything except digits is removed from the Meta and LinkedIn IDs. After saving, check that the fields still contain exactly what you entered.

REAL-WORLD EXAMPLE

A real estate agency puts the QR codes of its agents' cards on the signs in front of the apartments it is selling. The administrator enters the Meta Pixel ID and leaves the consent rule on. Within a month, several hundred people open the cards, and some of them accept cookies. The agency builds an audience in Meta from those visitors and, over the following weeks, shows them new apartments in the same neighborhood on Instagram.

## 35. Google reviews

**Where:** QR vCard Pro → Marketing → Reviews; on the portal: *Marketing* → *Reviews*; on public cards, the *Review* button

**Who:** administrator only **Plan:** all plans

> Satisfied clients rarely leave a review on their own, while unhappy ones do it right away? Offer everyone the same short path: one tap to a Google review and, on an equal footing, a private message to the company.

When you enable reviews, every public card gets a *Review* button and its own review page. On that page, the visitor chooses between a public review on Google and private feedback that reaches the company by email. For printing on a receipt, a table or a shop window, the generator creates a QR code and a link that lead straight to that page.

**Where do you find the Google review link?**

In your Google Business Profile, that is, your company's profile on Google Maps and in Search, the “Ask for reviews” button gives you a short link in the form `https://g.page/r/...`. The field also accepts the longer form `https://search.google.com/local/writereview?placeid=...`. If you paste the address without `https://`, the software adds it automatically.

### How do you enable reviews?

1. Copy the review link in your Google Business Profile.
2. On the *Reviews* tab, turn on *Enable reviews (show the "Review" button on cards)*, paste the link into the *Google review link* field and click *Save*. The message “Saved. The review QR code and link are ready.” appears.
3. In the “Review QR and link” section, select a card in the *For card* field. Copy the link with the *Copy* button under the “Review link” heading, and download the QR code image with the *Download QR (PNG)* button (the file `qr-recenzija.png`).
4. Before printing, open the link on a phone and check both options, the public one and the private one.

### Options

**Enable reviews (show the "Review" button on cards)** Default: off

When it is on, all public cards get the *Review* button, and the review page becomes available at the card address with `?recenzija=1` added. The page also works without a Google link: in that case, it offers only private feedback. The setting applies to all cards at once and cannot be enabled for only some of them.

**Example:** a restaurant enables reviews while a drive for ratings is running; when the drive ends, it turns them off, and the button disappears from all cards.

**Google review link** Default: empty

The address that the “Leave a review on Google” button on the review page leads to. Until the link is saved, the QR code and link generator is not shown (it is replaced by “First paste the Google link above and save; the QR code and link will then appear here.”), and the review page opens the private form right away.

**Example:** a car repair shop pastes the short link from its Business Profile, and from then on every customer gets from a mechanic's card to a Google rating in two taps.

**For card** Default: the first card alphabetically

Selects the card for which the generator creates the link and QR code (published cards, up to 200). The review page mentions the name from that card in the sentence under the heading. The selection is not saved: it is used only to create the link and the image.

**Example:** a hair salon with three stylists creates a separate QR code for each one, so the client sees on the page the name of the stylist they are rating.

### What does the visitor see?

- the heading “Leave a review” and a sentence with the name from the card;
- the “Leave a review on Google” button, only if the link is saved, with the word “or” below it;

- the “Have a complaint or suggestion? Let us know privately” section, which opens with a tap (it is open right away if there is no Google link), with the note “This message comes straight to us and is not published.”;
- the fields “Your message” (required, up to 2,000 characters), “Name (optional)” (up to 120) and “Email or phone for a reply (optional)” (up to 160), the “Send message” button and the confirmation “Thank you! Your message has been sent.”

The review page is hidden from search engines and is not cached, so the visitor always sees the current state.

**Where does private feedback go?**

By email, to the administration email address set in WordPress under Settings → General, with the subject “[Site Title] Private feedback from a QR card”. The message contains the feedback text, the name and the contact for a reply (if the visitor entered them) and the card name. Feedback is not stored in the database, so that email is the only record. At most five messages per hour can be sent from one IP address, after which the visitor sees “Too many messages. Please try again later.” Delivery depends on how your website sends email.

**Watch out:** feedback does not go to the card owner but to the site administrator's address. If a salesperson, shift supervisor or manager also needs to see it, set up forwarding in that mailbox.

**Why does this comply with Google's policies?**

Google does not allow filtering by rating (review gating): offering the public review only to satisfied customers while redirecting unhappy ones to a private form. The review page does not do that. There is no rating question before the choice; every visitor sees both the Google review button and the private form, and chooses for themselves. The public option is never hidden from anyone.

**Note:** the software records opening the review link as a card opening, so these openings appear as scans in analytics and in the campaign funnel.

REAL-WORLD EXAMPLE

A dental practice prints the review QR code on the back of its receipts, with the question “How satisfied were you with your visit?” Satisfied patients leave a rating on Google in two taps. A patient who found the wait too long chooses the private message, which reaches the practice by email, and the practice calls them the same day. The problem is solved through a conversation, and over time the Google profile gets more genuine ratings.

## 36. Automatic follow-up

**Where:** QR vCard Pro → Marketing → Follow-up; on the portal: *Marketing* → *Follow-up*; card follow-up: the card editor (the “2. Contact details” box in wp-admin, the “Follow-up email” section on the portal)

**Who:** only the administrator configures the general follow-up; the card follow-up can be configured by anyone allowed to edit that card (the card owner, Card Manager, Administrator)

**Plan:** general follow-up: all plans; card follow-up: 5 Sites and higher

> Does a contact who hears nothing from you the same day quickly forget why they scanned your card? Turn on automatic follow-up: the person who leaves you their contact details gets one polite thank-you message, immediately or after a delay you choose.

There are two follow-ups. The general one is configured in the Marketing module and applies to all cards; it offers a choice of sending time, your own SMTP server and an AI text suggestion. The card follow-up is configured on the card itself and has text just for that card. Both send a single message, in plain text, and only when a valid email address was left.

Only people who left their details themselves get the message: through the form on a card or through the form on an /l/ page. Contacts entered with the paper business card scanner or through the API never get an automatic message. If a card has its own follow-up enabled, only that one is sent and the general one is skipped for that card, so the same person does not get two thank-you messages. The card follow-up works on the 5 Sites plan and higher; on lower plans, the contact gets the general follow-up even when the card has its own enabled.

### How do you turn on the general follow-up?

1. Open Marketing → Follow-up (the “Automatic follow-up” section).
2. Turn on *Enable automatic follow-up (send a message after someone leaves their contact details)* and choose *When to send*.
3. Write the *Message subject* and *Message text*, or leave them empty to send the default text.
4. Enter the *Sender name* and *Sender email* and, if needed, the details in the “Advanced: your SMTP server (recommended for reliable delivery)” section.
5. Click *Save*; the message “Follow-up saved.” confirms that the settings were saved.
6. Send a test contact through the form on a card or on an /l/ page, using another address of yours, and check whether the message arrived, including in the spam folder.

### General follow-up options

**Enable automatic follow-up (send a message after someone leaves their contact details)** Default: off

The main switch. When it is on, every new contact with a valid email address gets one message, following the rules described at the start of this chapter. The same address gets at most one message in 24 hours, even if it leaves contact details on several cards.

**Example:** a company turns on the follow-up just before a trade fair, so everyone who leaves contact details at the booth gets a thank-you note with the sales rep's name the same day.

**When to send: “Immediately” / “After 1 hour” / “After 24 hours”** Default: Immediately

“Immediately” sends the message the moment the contact arrives. With delayed sending, the message is sent by the WordPress task scheduler (WP-Cron), which is triggered by visits to the site, so on a site with little traffic the message may go out somewhat later than the selected time.

**Example:** a law firm chooses “After 1 hour”, so the message does not arrive while the client is still in the meeting.

**Message subject** Default: empty (sends “Thank you for getting in touch”)

The email subject. The placeholders listed under the message text also work in the subject.

**Example:** `{ime}, thanks for the chat at the trade fair`.

**Message text** Default: empty (sends the default text)

The message body, in plain text. The default text starts with “Dear {ime}, Thank you for saving my contact and for your trust.” and ends with the signature {moje_ime} and {firma}. Placeholders you can use:

- `{ime}`: the name of the person who left their contact details;
- `{moje_ime}` and `{naziv_kartice}`: both insert the name from the card;
- `{firma}`: the company from the card or, if none is entered, the site name;
- `{moj_telefon}`: the first phone number from the card.

At the end of every message, the software automatically adds a blank line, the site name, the site address and the sentence “If you do not want to receive any more messages, reply to this email with the word STOP.”

**Example:** “Dear {ime}, thank you for visiting our booth. I will send you our catalog as soon as you let me know which services interest you, and for a quick conversation, call me at {moj_telefon}. Best regards, {moje_ime}, {firma}”.

**AI text suggestion** Button; visible only when an OpenAI key is entered

It appears below the Message text field only if an “OpenAI API Key” is entered in QR vCard Pro → Settings → Lead Capture (the same key is also used by the AI assistant). It writes a draft in Serbian, in Latin script, three to five sentences long, with the placeholders {ime}, {moje_ime} and {firma}. While waiting, it shows “AI is writing a suggestion…”. The draft replaces the entire previous content of the field and is saved only when you click *Save*.

**Example:** you click the button, get a draft, add a sentence about a free consultation and save.

**Sender name** Default: empty (the site name is used)

The name the recipient sees as the sender of the message.

**Example:** “Novak Law Office” instead of the site's technical name.

**Sender email** Default: empty

The address the message comes from; it must be a valid address. Recipients' replies also go to it, including “STOP” replies, because the general follow-up has no separate reply-to address. If the field is empty, with SMTP the sender is the wordpress@ address on the site's domain, and without SMTP, your site's mail settings apply.

**Example:** `sales@yourdomain.com`, a mailbox the sales team reads every day.

**SMTP host**

Default: empty (the site's mail is used) · in the “Advanced: your SMTP server (recommended for reliable delivery)” section

The address of the outgoing mail server. When it is entered, follow-up messages go through your mail account, from your domain, instead of through the site's mail, which usually means more reliable delivery. If sending through SMTP fails, the software sends the message through the site's mail.

**Example:** `mail.yourdomain.com`, a detail you get from your hosting or email provider.

**Port** Default: 587

The SMTP server port. Choosing the encryption does not change the port automatically: with TLS it is usually 587, and with SSL 465.

**Example:** your hosting requires SSL, so you enter `465` and select “SSL (465)” in the Encryption field.

**SMTP username** Default: empty (no server login)

The username for logging in to the SMTP server, usually the full mailbox address.

**Example:** `sales@yourdomain.com`.

**SMTP password** Default: empty

The password of that mail account. It is stored exactly as entered.

**Example:** the password of the `sales@yourdomain.com` mailbox, or a separate app password if your email provider requires one.

**Encryption: “TLS (587)” / “SSL (465)” / “No encryption”** Default: TLS (587)

How the connection to the SMTP server is protected. Set the port manually to match your choice.

**Example:** most providers work with “TLS (587)”; use “No encryption” only if your provider explicitly requires it.

**Add a WhatsApp button to my new-contact notification for a quick manual reply (if the lead left a phone number)**

Default: on

When a new contact with a phone number arrives, the email the card owner gets about it also contains the line “Reply on WhatsApp:” with a `https://wa.me/` link and the digits of that number. The option works independently of the follow-up, so the line is added even when the follow-up is off. The number is not converted to international format: the link opens the right chat only if the visitor entered the number with the country calling code (for example +44...).

**Example:** a sales rep in the field gets the notification, taps the link and replies to the client on WhatsApp within a minute.

### How does the card follow-up work?

In wp-admin, it is configured in the “2. Contact details” box of the card editor; on the portal, in the “Follow-up email” section of the card editor, which is shown only on the 5 Sites plan and higher. In wp-admin, the fields are visible on every plan, but the message is sent only from the 5 Sites plan up.

**Automatically send a "thank you" email to the lead after a contact exchange (wp-admin) / Enable follow-up email (portal)** Default: off · Plan: 5 Sites and higher

Turns on a message for this card only. When it is on, contacts from this card get only this message, not the general follow-up. On the portal, the subject and text fields appear only after you turn the option on.

**Example:** the director's card uses a personal tone, while the other employees' cards use the company's general text.

**Email subject** Default: empty (sends “Thanks for sharing your contact with {vlasnik}”)

The message subject for this card, with the same placeholders as the text.

**Example:** `It was great to meet you, {ime}`.

**Email body** Default: empty (sends the default text)

The message body for this card. The default text starts with “Dear {ime}, Thank you for sharing your contact with {vlasnik}.” Available placeholders: `{ime}` (the person's name), `{vlasnik}` (the first and last name from the card or, if there are none, the name of the user account), `{kartica}` (the card name) and `{firma}` (the company from the card).

**Example:** “Dear {ime}, thank you for today's meeting. I will send the quote we discussed as an attachment to my next email. Kind regards, {vlasnik}, {firma}”.

**How do the two follow-ups differ?**

| | General follow-up | Card follow-up |
|---|---|---|
| **Where it is configured** | Marketing → Follow-up | card editor |
| **Who configures it** | administrator | whoever may edit the card |
| **Plan** | all plans | 5 Sites and higher |
| **Applies to** | all cards without their own follow-up | that card only |
| **When it is sent** | immediately, after 1 hour or after 24 hours | immediately |
| **How it is sent** | through your SMTP server, if entered, otherwise through the site's mail | through the site's mail |
| **The recipient's reply goes to** | the Sender email | the email address of the card owner's account |
| **Placeholders** | {ime}, {moje_ime}, {naziv_kartice}, {firma}, {moj_telefon} | {ime}, {vlasnik}, {kartica}, {firma} |
| **Added at the end of the message** | the site name and address and the sentence about unsubscribing with the word STOP | nothing |
| **AI text suggestion** | yes, with an OpenAI key | no |
| **Limit** | one message per address in 24 hours | one message per address in 24 hours |

**Watch out:** the default text of the general follow-up invites the recipient to reply to the email, and the reply goes to the address in the *Sender email* field, not to the card owner. Enter a mailbox that someone reads regularly and from which replies are forwarded, or adjust the text so that it points to the phone number or email address on the card.

**Watch out:** a “STOP” reply is not processed automatically, and the software does not keep an unsubscribe list. Watch for such replies in the sender's mailbox and respect them in any further personal communication with that person.

**Watch out:** the SMTP password is stored in the site's database exactly as entered and stays in the form field, where anyone with administrator access to that screen can see it. For sending, use a separate mailbox or a separate app password, not the password of your main account.

**Note:** the follow-up is sent regardless of whether the person ticked the consent box in the form. So keep the message to a thank-you and a continuation of the conversation, without promotional offers; the company is responsible for the content of the messages and for the legal basis. The placeholders of the two follow-ups differ ({moje_ime} versus {vlasnik}), so do not mix them up.

REAL-WORLD EXAMPLE

A law firm hands out cards at a professional conference. The administrator turns on the general follow-up with “After 1 hour” sending, enters the office SMTP server and, as the sender, an address that the office assistant reads. Everyone who leaves contact details on a card gets a thank-you note with the attorney's name and phone number, and replies go to the assistant, who distributes them. One of the firm's partners has his own personal text on his card, so his contacts get only that message.

## 37. Pages /l/: link hub and lead magnet landing page

**Where:** QR vCard Pro → Marketing → Pages; on the portal: *Marketing* → *Pages*; publicly at the /l/name address

**Who:** administrator only **Plan:** all plans

> Need one link for your Instagram bio, a flyer or a campaign, rather than one person's business card? Create an /l/ page: a set of buttons, a contact form and, if you like, a file the visitor gets in exchange for their email address.

An /l/ page is a standalone, simple page at a short address on your website, for example `yourdomain.com/l/fall-promo`. It can be a link hub, with buttons to your website, social networks and booking; a campaign page with a form; or a landing page with a free gift (a lead magnet), where the visitor gets a download link for a file after submitting the form. Contacts from the form go into the existing Contacts of the selected card, like any other contact.

### How do you create a page?

1. Open Marketing → Pages and click *+ New page*.
2. Enter the *Page title* in Latin letters: the page address is created from it.
3. Add a subtitle, an image and buttons.
4. If you need a form, turn on *Show a contact capture form* and be sure to select a card in the *Leads from this page go to card* field.
5. For a free gift, paste the file address into *Lead magnet: file URL (optional)*.
6. Leave the Status set to “Published” and click *Save page*. The message “Page saved.” confirms that the page was saved, and you stay on the edit form.
7. Use the *Open page* button to check the layout and the form, then copy the address from the Link column in the list and share it. The generator on the Campaigns tab creates QR codes only for cards, so use a different QR code generator for an /l/ page.

### Options

**Page title** Required field

The main heading on the page, the title in the browser tab and the title when the page is shared on social networks. WordPress creates the page address from it when the page is first published; changing the title later does not change the address. If the title still arrives empty, the page gets the title “New page”.

**Example:** the title “Free home valuation” produces the address `/l/free-home-valuation`.

**Subtitle (optional)** Default: empty

A sentence below the heading. It is also used as the page description for search engines and in the preview when the page is shared on social networks.

**Example:** “Leave your details and an agent will call you within one business day.”

**Image / logo URL (optional)** Default: empty

An image above the heading, displayed at up to 120 × 120 pixels, which is also used as the image when the page is shared. The field has no media library picker: upload the image to the WordPress Media Library, copy the file address and paste it here.

**Example:** the agency's logo, uploaded to Media, at `https://yourdomain.com/wp-content/uploads/2026/11/logo.png`.

**Buttons** Default: empty

One line is one button, in the format `Name | URL`. A line without the “|” character becomes a button whose label is the address itself. A line with an invalid address is skipped. Buttons open in a new browser tab. Always write the full address with `https://`, because an address without it gets the insecure `http://`; in addition to web addresses, call links (`tel:`) and email links (`mailto:`) also work.

**Example:** three lines: `Our website | https://yourdomain.com`, `Book an appointment | https://yourdomain.com/booking` and `Call us | tel:+12025550123`.

**Show a contact capture form** Default: off

Adds a form with the fields “First name”, “Email” and “Phone (optional)” and a “Send” button (or the download label, if a free gift is set). The form is shown only when a published card is selected in the field below; without one, there is no form on the page, and the visitor sees no warning.

**Example:** a real estate agency turns on the form on the “Free home valuation” page, and every request arrives as a contact on the card of the agent for that neighborhood.

**Title above the form** Default: “Leave your details”

The heading shown above the form fields.

**Example:** “Send me a quote”.

**Leads from this page go to card** Default: “Select a card” (none)

A list of published cards (up to 200). It is required when the form is on. The contact is recorded in that card's Contacts, with a tag equal to the page title and the message “From page: title”, and the card owner gets a notification, just as for any contact from their card.

**Example:** the “Network security checklist” page sends contacts to the sales lead's card, and the sales lead then distributes them.

**Lead magnet: file URL (optional)** Default: empty

The address of the file the visitor gets after successfully submitting the form. Instead of the usual confirmation, the page then shows “Thank you! The download link is below, and we have also sent it to your email.” with a download button, and the visitor also gets an email, “Your download: page title”, with the same link. The file must be publicly accessible: anyone who has the link can download it.

**Example:** a PDF guide uploaded to Media, at `https://yourdomain.com/wp-content/uploads/2026/11/guide.pdf`.

**Download button text** Default: “Download”

When a free gift is set, this text appears both on the form's submit button and on the download button after submission.

**Example:** “Download the guide”.

**Status: “Published” / “Draft”** Default: Published

A draft is not public: its address shows “Page not found.”, and the form does not accept contacts. A page gets its address only when you publish it for the first time, so while it is a draft, the link in the list cannot be used.

**Example:** prepare the page for a December promotion as a draft in November and publish it on December 1.

**Hide from search engines (noindex)** Default: off

The page gets an instruction telling search engines not to show it in their results, and it is left out of the sitemap. Without this checkbox, the page can appear in search and is included in the sitemap, even when cards appearing in search is turned off (SEO and search visibility).

**Example:** a page with a discount only for the visitors of one trade fair gets noindex, so that people who were not at the fair do not find it.

**What does the visitor see, and what happens when they submit the form?**

The visitor sees the image, heading, subtitle and buttons, the form below them (if it is on) and the site name at the bottom. The form requires a name and a valid email address; if something is missing, it shows “A name and a valid email are required.” From one IP address, one form per five minutes can be submitted to the same page, after which the page shows “Too many messages. Please try again later.” A hidden field stops automated bots.

A submitted contact goes into the Contacts of the selected card, together with the campaign tags from the link or the cookie (Campaigns and conversion funnel). The card owner gets a notification, and the contact then flows on like any other: the "Contact received" webhook, Odoo if it is set up, and the automatic follow-up if it is on. If you add tags to the page link, for example `/l/fall-promo?utm_source=instagram&utm_campaign=fall`, contacts from the form get those tags.

**How do you manage the list of pages?**

The "Pages (landing and link hub)" list shows up to 200 published pages and drafts, most recently modified first, with the columns Title, Link and Status ("Published" or "Draft"). Each page has the *Edit*, *Open* and *Delete* buttons. Deleting asks for the confirmation "Delete this page?" and is permanent: the page does not go to the trash and cannot be restored.

**Watch out for the address:** a page address may contain only letters of the English alphabet, digits, hyphens and underscores. Accented letters are converted to plain ones; on a site whose language is Serbian, for example, č, ć, š and ž become c, s and z, and đ becomes dj. So publish the page for the first time with a title in Latin letters; you can later change the title, even to another script such as Cyrillic, and the address stays the same. After the first publication, check the link in the list with the *Open* button. If the address does not work, create a new page with a title in Latin letters and delete the old one.

**Watch out:** the form on an /l/ page has no consent field, and the consent setting from Lead Capture does not apply here. Add a sentence to the subtitle about what you do with the data, and add a link to your privacy policy among the buttons, for example `Privacy policy | https://yourdomain.com/privacy`.

**Note:** openings of /l/ pages are not recorded, and these pages have no Google measurement code, pixels or consent banner. Measure a page's success by the number of contacts: in Contacts, you recognize them by the tag equal to the page title and by the message "From page: …", because they have no separate entry in the source filter. The Contacts screen is available from the 5 Sites plan; on lower plans, contacts are still recorded, and the card owner gets an email about each one (Contacts: overview, tags, notes and export).

REAL-WORLD EXAMPLE

Ahead of a trade fair, an IT company creates a "Network security checklist" page, with a form, the sales lead's card and a PDF guide as a free gift. It prints the page's QR code on a flyer and puts the link in its LinkedIn profile description. A visitor leaves a name and email address and downloads the guide right away, and the contact arrives in Contacts with the page title as its tag. When the fair is over, the administrator switches the page to draft.

## 38. SEO and search visibility

**Where:** QR vCard Pro → Marketing → SEO; QR vCard Pro → Settings → Privacy and GDPR (the "SEO: cards appearing in search" block); the card editor in wp-admin (the "SEO and visibility" box); on the portal: *Marketing → SEO*

**Who:** only the administrator configures it; the Card Manager, Employees and Team members do not see these settings and ask the administrator for changes

**Plan:** all plans

> Do you want your card to appear when someone searches Google for your name and company, or the exact opposite, for it to be seen only by the people you give the QR code to? One global switch decides this, with an exception for individual cards set on the card itself.

Indexing means that search engines such as Google and Bing may show a page in their search results. A card that is not indexed still works normally through its link and QR code; search engines simply do not show it. Cards appearing in search is turned off by default, for privacy. When you turn it on, it is a permission, not a guarantee: the search engine decides whether and when the card appears in the results.

On the portal, the Card Manager, Employees and Team members have no SEO tab, and the box on the card exists only in wp-admin. If you want your card to appear in search or to be removed from it, ask the administrator.

### How do you turn on search visibility?

1. Open Marketing → SEO and turn on *Allow cards to appear in search engines (global)*.
2. Optionally, fill in *Default share image (optional)*.
3. Click *Save*. The message “SEO settings saved.” confirms that the settings were saved, and “The sitemap is active:” appears below the form, with the address `/qrvp-sitemap.xml`.
4. Exclude the cards that must not appear in search in the “SEO and visibility” box of the card editor in wp-admin.
5. Fill in the card details: the position, company, short description and photo become the description and image in search results and when the card is shared.
6. In Google Search Console, submit the sitemap address in the Sitemaps section, so that Google finds it faster.

### Options

**Allow cards to appear in search engines (global)** Default: off

Determines what applies to all cards on which the “Default” choice is left. When it is on, published cards get permission to be indexed and get structured data, and a sitemap line is added to robots.txt. The same switch also exists in QR vCard Pro → Settings → Privacy and GDPR, under the name “Allow cards to appear in search engines”; saving there changes only the switch and does not touch the share image, and the “More options in Marketing → SEO →” link leads to this tab.

**Example:** a consulting firm turns on global search visibility because it wants clients to find it by its consultants' names.

**Default share image (optional)** Default: empty

A fallback image for cards and pages that do not have their own. On /l/ pages without an image, it is used as the share image on all networks. On cards without a photo, it is used only for the preview on X (Twitter) and in the structured data, while Facebook and LinkedIn show only the photo from the card when the card is shared. Upload the image to the WordPress Media Library and paste its address; if the address has no `https://`, the software adds it automatically.

**Example:** the company logo on a white background, at `https://yourdomain.com/wp-content/uploads/2026/11/share.jpg`.

**Appearing in search: “Default (follows the global setting: enabled/disabled)” / “Yes, allow in search” / “No, hide from search”** Default: Default · the “SEO and visibility” box on the card, wp-admin only

An exception for a single card that overrides the global rule. The parentheses of the first choice show the current global state. Below the choices, the box shows what applies now: “Currently: this card is indexed (visible in search).” or “Currently: this card is NOT indexed (only reachable via its direct link/QR code).” The choice takes effect when you save the card, and only a published card can be indexed.

**Example:** the global setting is off, but the director's card has “Yes, allow in search”; or the global setting is on, and a card with a private phone number has “No, hide from search”.

**What exactly changes on the card?**

- **Always, regardless of the setting:** the instruction to search engines, “index, follow” or “noindex, nofollow”, both in the page code and in the server's response header; a page description made up of the position, company and short description (up to 160 characters); the card's main address (canonical); tags for sharing on social networks and for the preview on X, with the card photo or the fallback image.
- **Only when the card is indexed:** structured data of the Person type (schema.org) with the name, card address, position, company, first phone number, first email address and image. From this data, the search engine recognizes that the page is a person's profile.

On /l/ pages, the output includes the main address, the title, the description from the subtitle and the image (the page's image or the fallback), without structured data. An /l/ page is hidden from search engines only with the “Hide from search engines (noindex)” checkbox on the page itself (Pages /l/: link hub and lead magnet landing page).

**What are the sitemap and robots.txt?**

A sitemap is a list of addresses that makes it easier for search engines to find pages. The software builds it automatically, at `/qrvp-sitemap.xml`: it contains the published cards that may be indexed and the published /l/ pages without noindex, with the date of the last change, up to 2,000 cards and 2,000 pages. Robots.txt is a file with instructions for search engines. The line `Sitemap: https://yourdomain.com/qrvp-sitemap.xml` is added to it, but only when global search visibility is on and the site is not hidden from search engines in WordPress under Settings → Reading.

**Watch out:** the sitemap responds even when global search visibility is off, and it then contains the /l/ pages without noindex and the cards set to “Yes, allow in search”. So mark the /l/ pages you do not want in search with the noindex checkbox.

**Watch out:** the sitemap line is added to the robots.txt that WordPress generates. If there is a separate robots.txt file on the server, the line may not be added; in that case, add the sitemap address to that file yourself or submit it in Google Search Console.

**Note:** add a photo to the cards you share on Facebook and LinkedIn, because those networks do not use the fallback image on a card. The per-card exception and the block in Settings exist only in wp-admin.

**REAL-WORLD EXAMPLE**

A law firm with five attorneys wants clients to find the firm's partners, but not its associates. The administrator leaves global search visibility off and, on the cards of the two partners, selects “Yes, allow in search” in the “SEO and visibility” box. The administrator fills in their position, company, short description and photo and submits the sitemap in Search Console. After a while, a search for a partner's name and the firm's name shows that partner's card with the photo and description, while the associates' cards remain reachable only through the QR code.

# 39. Bulk Import of cards from CSV

**Where:** QR vCard Pro → Bulk Import (the “Bulk Import: QR Cards” screen); the *Bulk Import* tile on Home, in the “Events and import” group

**Who:** administrator only; this import does not exist on the portal

**Plan:** Agency only

> Need to create cards for fifty people at once, with no time to fill in each one by hand? Prepare a spreadsheet, save it as a CSV file and import it: the software checks every row, shows the errors and creates all the valid cards in one step.

Bulk Import creates cards only. Nobody gets a user account or an email, and you manage the cards yourself. This sets it apart from the import on the Employees screen, which creates employee accounts and sends each employee an email with a sign-in link, so that they can edit their own card.

**Bulk Import (this chapter)**

- creates cards only
- no accounts and no emails
- the owner of all cards is the administrator who runs the import
- preview and check of every row before the import

**Employees → Bulk import from CSV**

- creates the employee's account and card
- sends each employee an email with a sign-in link
- the card owner is the employee
- described in the chapter Employees

Without the Agency plan, the screen shows a locked view, “Bulk Import: Agency tier feature”, with the “View Agency package →” button.

### What does the import look like, step by step?

1. On the Bulk Import screen, in the “No CSV?” section, click ⬇ *Download CSV template*. You get the file `qrvp-import-template.csv`, UTF-8 encoded and with a comma as the separator, with 18 columns and three sample rows. Delete the sample rows (Marko Petrović, Ana Jovanović, Stefan Nikolić) before filling in the file, or cards will be created from them too.
2. Fill in the spreadsheet: the first row holds the column names, and every following row is one card. The columns can be in any order, and empty cells are skipped. One file can contain at most 500 data rows, and the file can be at most 2 MB.
3. Save the spreadsheet as a comma-separated CSV in UTF-8 encoding (instructions for Excel and Google Sheets are below).
4. In the “Step 1: Upload CSV file” section, click *Click here or drag a CSV file*, select the file (extension .csv or .txt) and click *Analyze file →*.
5. In the “Step 2: Preview and validation” section, review the counters “rows total”, “valid” and “with errors (will be skipped)”, the warnings and the “Preview (first 10 rows):” table with the columns #, Status (✓ or ✗), first_name, last_name, position, company, email and Errors. The number in the # column is the row number in the file, where the first row is the header.

6. If everything is in order, confirm with the *Import all N cards* → button; if there are errors, use the *Import N valid cards* → button (rows with errors are skipped). *Cancel* takes you back to the start. Confirm within 15 minutes of the analysis.
7. The “Import complete!” screen shows “created”, “skipped” and “import duration”, and the “N rows skipped, show errors” section lists each error in the form “Row N: error description”. The ← *Open all cards* button takes you to the card list, and *+ New import* starts a new import. The result remains available for 30 minutes.

The import has no step for manually mapping columns to fields: the software recognizes columns only by their exact name. Column names are not case-sensitive.

**Options**

**Click here or drag a CSV file** Default: no file selected

The file selection field in step 1. It accepts a file with the .csv or .txt extension, up to 2 MB in size and with at most 500 data rows. When you select a file, its name is shown instead of the label. The file is analyzed only when you click *Analyze file* →, and no card is created until you confirm the import.

**Example:** you drag the file `exhibitors-spring-fair.csv` from a folder on your computer into the field, click *Analyze file* → and immediately see in the preview how many rows are valid.

**Which columns does the software recognize?**

| Column | Required | Card field | Rules and example |
| --- | --- | --- | --- |
| `first_name` | yes | First name; the first part of the card name | must not be empty; `Mark` |
| `last_name` | yes | Last name; the second part of the card name | must not be empty; `Davis` |
| `position` | no | Position / role | free text; `Sales Director` |
| `department` | no | Department (optional) | `Sales` |
| `company` | no | Company | `Example LLC` |
| `headline` | no | Headline / tagline (optional) | one short sentence |
| `accreditations` | no | Certifications / titles (optional) | separate multiple values with a comma inside the cell; `MBA, PMP` |
| `tags` | no | Tags / skills (optional) | separate multiple values with a comma inside the cell; `B2B,Logistics` |
| `bio` | no | Bio / short description | multiple lines are allowed |
| `featured_note` | no | Featured note (optional) | multiple lines are allowed |
| `card_label` | no | Card type (optional) | only `work` (Work) or `personal` (Personal), in lowercase |
| `phone` | no | first phone number, labeled Work | the format is not checked; include the country code: `+12025550123` |
| `email` | no | first email address, labeled Work | must be a valid address; `mark@example.com` |
| `website` | no | first website, labeled Work | an address without `https://` gets it added: `example.com` becomes `https://example.com` |
| `theme` | no | the card's four colors (primary, accent, background, buttons) | exactly one of these values: `earth_tones`, `corporate_blue`, `forest_green`, `royal_pink`, `bold_red`, `premium_gold`, `dark_tech`, `personal_rose` |
| `linkedin`, `facebook`, `instagram`, `twitter`, `threads`, `youtube`, `tiktok`, `snapchat`, `twitch`, `yelp`, `telegram`, `signal`, `discord`, `skype`, `github`, `calendly`, `paypal`, `venmo`, `cashapp` | no | links to social networks and services | an address without `https://` gets it added; `linkedin.com/in/markdavis` |

| Column | Required | Card field | Rules and example |
|---|---|---|---|
| `whatsapp` | no | WhatsApp (phone) | a phone number, not a link: `+12025550123` |

Columns the software does not recognize are listed in the warning “Unknown columns (will be ignored):” and are not written anywhere. The most common causes are typos or column names from other programs; for example, the LinkedIn column is called `linkedin`, not `social_linkedin`. If `first_name` or `last_name` is missing from the header, “Required columns missing in the header:” appears, and every row gets an error.

### How do you save a CSV from Google Sheets?

1. Open the spreadsheet in Google Sheets. You can import the template through File → Import → Upload.
2. Before entering phone numbers, select the `phone` and `whatsapp` columns and choose Format → Number → Plain text, so that Sheets does not turn a number with a + sign or a leading zero into a plain number.
3. Fill in the data; the first row keeps the column names.
4. Choose File → Download → Comma Separated Values (.csv). Sheets always saves a CSV with commas and in UTF-8 encoding, so there is nothing else to set. Only the sheet that is currently open is downloaded.

### How do you save a CSV from Excel?

1. Before entering phone numbers, select the `phone` and `whatsapp` columns, right-click to open Format Cells and choose Text, for the same reason as in Google Sheets.
2. Fill in the data, then choose File → Save As and select “CSV UTF-8 (Comma delimited) (*.csv)” as the file type; in other language versions of Excel, it is the item that starts with “CSV UTF-8”. A plain CSV without the UTF-8 label does not save letters such as é, ü, č or ž correctly.
3. When Excel warns that only the active sheet will be saved, confirm.
4. Check the separator: right-click the saved file and choose Open with → Notepad. The first row should start with `first_name,last_name,`. If there is a semicolon (;) between the names, Excel used the Windows regional settings, which is common with regional formats that use a decimal comma, and the software cannot read such a file.
5. In that case, import the file into Google Sheets (File → Import → Upload; the semicolon is detected automatically) and save it as a CSV following the instructions above.

Both programs automatically put values that contain a comma inside a cell, such as `B2B,Logistics` in the tags column, in quotation marks, so the import reads them correctly. In Excel, you get multiple lines in a cell (in the bio column) with Alt+Enter.

#### What happens to errors and duplicates?

A row with an error is skipped, and all valid rows are imported. The possible row errors are: “first_name is empty”, “last_name is empty”, “email is not valid”, “theme '...' does not exist” and “card_label must be 'work' or 'personal'”. The values for email, card_label and theme are checked exactly as entered, including spaces: “ work” or “corporate_blue ” with a space produces an error, so delete spaces at the beginning and end.

Errors that affect the whole file are shown above the form: “Bulk Import is available only on the Agency tier.”, “No file selected.”, “File is too large (max 2MB).”, “File must be in .csv format.”, “CSV is empty or has an invalid format.”,

“CSV has too many rows. Max 500 per import.”, “Missing token.”, “Upload expired. Please try again.” and “Exceeds the card limit for your tier. Delete existing cards or upgrade.” If more than 15 minutes pass between the analysis and the confirmation, “Upload expired (15 minutes). Please try again.” appears, and you analyze the file again.

Duplicates are not checked: importing the same file again creates new cards, each with a new address. If some rows were skipped, correct only those rows, save them to a new file and import that file, not the whole list again.

**What do the new cards get, and what do they not get?**

- Every card is published immediately and has its own unique address, just like a card created manually.
- The owner of all imported cards is the administrator who runs the import. Notifications about contacts from those cards go to that administrator, and the salesperson assignment in Odoo is based on that administrator's email (Odoo ERP). If people need to edit their own cards, use the import on the Employees screen.
- Images are not part of the CSV: you add the photo, logo and cover image later, manually, on each card.
- The layout template stays the default one, and the `theme` column changes only the four colors (Appearance: templates, free layout and colors).
- One phone number, one email address and one website are written, each labeled Work; you enter additional ones manually.
- If you have a webhook for the “Card created” event, each imported card sends one event (Webhooks).

**Watch out:** the file must be UTF-8 encoded. If it is not, fields with letters such as é, ü, č or ž may stay empty on the cards, and the preview will not necessarily show it. After the import, open a few cards that contain such letters and check them.

**Watch out:** up to 500 cards are created in a single step. On slower hosting, split the list into several smaller files. If the page is interrupted during the import anyway, check the card list before trying again, because some of the cards may already have been created.

REAL-WORLD EXAMPLE

A trade fair organizer creates cards for 120 exhibitor representatives, who will not edit the cards themselves. The administrator downloads the template, deletes the sample rows and, in Google Sheets, fills in the first name, last name, company, position, phone, email and the `corporate_blue` theme. The preview shows two rows with an invalid email; the administrator imports the 118 valid cards, corrects those two rows in a new file and imports them as well. In less than half an hour, every exhibitor has a card and a QR code for their accreditation.

## 40. Webhooks

**Where:** QR vCard Pro → Webhooks; on the portal: *Webhooks*

**Who:** the Administrator, in wp-admin and on the portal, for all users' webhooks (the delivery log only in wp-admin); the Card Manager, on the portal, only for their own webhooks

**Plan:** Unlimited and higher

> Want every new contact to land in your CRM, a Google Sheets spreadsheet or your team's channel automatically, without anyone retyping it? Create a webhook: the software sends the event data to your address as soon as the event happens, with a signature the receiver uses to verify that the data really comes from your site.

A webhook is an internet address given to you by the service that receives the data: Zapier, Make, n8n or a system your developer built. When an event happens, for example a new contact, the software sends a request (HTTP POST) with the data in JSON format to that address. The receiving service then does whatever you set up in it: adds a row to a spreadsheet, sends a message to your team or creates a record in your CRM.

A webhook receives events according to the permissions of the person who created it. A webhook created by the Administrator or a Card Manager receives events for all of the company's cards, including the employees' cards. Only the Administrator and Card Manager see the Webhooks screen; an employee or team member can create a webhook only through the API, and such a webhook receives events only for that account's cards.

Without the Unlimited plan, the screen shows “Webhooks are available from the Unlimited tier.” (on the portal, “Webhooks are not available on your tier”). Webhooks that were already created stay saved, but nothing is sent.

**Which events are there?**

| Name in the form | Key | When it is sent | Fields in the data object |
|---|---|---|---|
| **Card created** | `card.created` | when a published card is saved for the first time | card_id, title, slug, landing_url, created_at, updated_at, meta (card fields) |
| **Card updated** | `card.updated` | on every later save of a published card | same as Card created |
| **Card deleted** | `card.deleted` | when a card is permanently deleted | card_id, title |
| **Contact received** | `contact.received` | for every new contact, from any source | contact_id, card_id, name, email, phone, company, message, consent_given, acquisition_method, received_at |
| **Scan recorded** | `scan.recorded` | when a visitor saves the contact from a card or submits the contact exchange form | scan_id, card_id, action, country_iso, city, os, browser, scanned_at |

The test button sends a special `test.ping` event, which is not in the form; in the data object, it carries the message “This is a test webhook event from QR vCard Pro.”, plus the webhook's number and name.

**What does a sent request look like?**

Every request has the same envelope: `event` (the event key), `occurred_at` (the time of the event in UTC), `plugin_version` and `data` (the event data). Example for the Contact received event:

```
{
  "event": "contact.received",
  "occurred_at": "2026-11-04T09:15:42+00:00",
  "plugin_version": "3.2.16",
  "data": {
    "contact_id": 318,
    "card_id": 42,
    "name": "Anna Miller",
    "email": "anna@example.com",
    "phone": "+1 202 555 0123",
    "company": "Example LLC",
    "message": "I would like a quote for maintenance.",
    "consent_given": true,
    "acquisition_method": "direct_form",
    "received_at": "2026-11-04T10:15:41"
  }
}
```

The `received_at` time is the site's local time, without a time zone designator. Along with the request body, these headers arrive:

- `Content-Type: application/json`
- `User-Agent: QR-vCard-Pro-Webhook/1.0`
- `X-QRVP-Event`: the event key, for example `contact.received`
- `X-QRVP-Signature`: the signature, in the form `sha256=` followed by a string of hexadecimal characters
- `X-QRVP-Delivery`: a unique ID of the delivery attempt (UUID), new for every attempt
- `X-QRVP-Attempt`: the attempt number

**How do you verify the signature?**

When a webhook is created, the software generates a 48-character secret key. Every delivery is signed with this key, using HMAC-SHA256 over the entire request body, and the signature arrives in the `X-QRVP-Signature` header. The receiver computes the same signature itself and compares it with the one received; if they differ, the request does not come from your site or was altered on the way. Example of verification in PHP:

```php
<?php
// The secret key you copied when you created the webhook
$secret = 'PASTE_YOUR_SECRET_KEY_HERE';

// The raw request body, exactly as it arrived
$body     = file_get_contents( 'php://input' );
$received = $_SERVER['HTTP_X_QRVP_SIGNATURE'] ?? '';
$expected = 'sha256=' . hash_hmac( 'sha256', $body, $secret );

if ( ! hash_equals( $expected, $received ) ) {
    http_response_code( 401 );
    exit( 'Invalid signature' );
}

$payload = json_decode( $body, true );

if ( 'contact.received' === $payload['event'] ) {
    $kontakt = $payload['data'];
    // Write $kontakt['name'], $kontakt['email'] and the other fields to your system here
}

http_response_code( 200 );
echo 'OK';
```

Compute the signature over the raw request body, before decoding the JSON, and compare it as in the example, with a function that compares in constant time. Zapier and Make accept the request even without a signature check; the signature matters when you receive the data on your own server.

**What happens when the receiver does not respond?**

A delivery succeeds when the receiver responds within 8 seconds with a status code from the 2xx group, for example 200. If it does not respond or returns an error, the software retries the delivery after 1, 5 and 15 minutes. If the last attempt also fails, the delivery is marked as failed and the webhook's failure count goes up, while every successful delivery resets that count to zero. After ten consecutive failed deliveries, the webhook disables itself.

Deliveries are sent in the background, through the WordPress task scheduler (WP-Cron), including the first attempt. The scheduler is triggered by visits to the site, so on a site with little traffic, deliveries may be delayed. If speed matters to you, ask your hosting provider to set up a system cron for WordPress.

### How do you create a webhook in wp-admin?

1. Open QR vCard Pro → Webhooks, the “Add webhook” section.
2. Enter the *Name* and *URL* (the rules are in the options below).
3. In the *Events* section, leave *All events (recommended)* checked, or clear that checkbox and, under “Or select specific events:”, check only the events you want. The webhook will receive only the selected events.
4. Click *Create webhook*. “🔑 Save this secret: it is shown ONLY ONCE” appears, with the secret key and a *Copy* button. Copy the key right away, because it is no longer shown once the page is refreshed.
5. In the “Active webhooks” list, click *Test* and check the result.

### How do you create a webhook on the portal?

1. On the portal, open *Webhooks*, the "➕ New webhook" section.
2. Fill in *Name* * and *URL (endpoint)* *; both fields are required.
3. In the *Events (leave empty for all):* section, check the events you want, or check none, and the webhook receives all of them.
4. Click ✓ *Create webhook* and copy the key from the "🔑 Webhook secret key (shown only once!)" box.

#### Options

**Name (wp-admin) / Name * (portal)** Default: empty; in wp-admin, an empty name becomes the host name from the address

A description of the webhook for your own reference, visible in the list and in the delivery log.

**Example:** "Zapier, new contacts to Google Sheets".

**URL (wp-admin) / URL (endpoint) * (portal)** Required field

The address the events are sent to. It must start with `https://`, can have at most 500 characters and must not point to a local or private network. If the address does not meet these rules, the webhook is not created and a screen with an error message appears, for example "The URL must be an HTTPS address (security requirement)."; go back with your browser's back button and correct the address.

**Example:** the address Zapier provides for the Catch Hook trigger, in the form `https://hooks.zapier.com/hooks/catch/...`.

**Events (wp-admin) / Events (leave empty for all): (portal)** Default: all events

The webhook receives only the selected events. The selection is saved and shown in the list: in wp-admin, the Events column shows "all" or the number of selected events, and on the portal, the "Events:" line lists their names. You change the events later on the portal, in the Edit section.

**Example:** a webhook to your CRM receives only Contact received, and a webhook to the internal employee directory only the three card events.

**Active** Default: on · on the portal only, in the Edit section

Temporarily disables or re-enables the webhook. Events that happen while the webhook is disabled are not sent later either. There is no webhook editing in wp-admin, so you enable, disable and change the name, address and events on the portal, with the *Save changes* button. A re-enabled webhook keeps its earlier failure count, so the next failed delivery can disable it again right away; that is why you should check with a test that the receiver works before you enable it.

**Example:** while you rework a Make scenario, disable the webhook; when the scenario is ready, enable it and send a test.

### What do the buttons in the list do?

- ***Test* (wp-admin) and ⚡ (portal)**: send a test event right away and show the result. In wp-admin, this is "✓ Test webhook delivered successfully!" or "✗ Test webhook failed", with Status, HTTP code and Duration; on the portal, "Test request sent. HTTP status: …". A failed test is retried like a real delivery and counts toward the failure count. Testing a disabled webhook sends nothing.
- **🔄 *Secret* (wp-admin) and 🔄 (portal)**: create a new secret key, after the confirmation "Generate a new secret? The old one will stop working." (on the portal, "Rotate the secret key? The old signature will stop being valid."). The new key is shown once; enter it at the receiver right away.
- ***Delete* (wp-admin) and 🗑 (portal)**: delete the webhook and its delivery records, after confirmation.
- ***Edit* (portal only)**: name, address, events and Active. When editing, do not leave the URL field empty.

The list in wp-admin has the columns Name, URL, Events, Status ("active" or "disabled", with the number of failures) and Last triggered (the time of the last delivery, or "Never"). On the portal, each webhook shows its state (active or inactive), its events, the number of failures and the time of the last delivery.

**Where can you see the delivery log?**

In wp-admin, below the list, in the "Recent events (last 20)" table. The columns are Time, Webhook ("(deleted)" if the webhook no longer exists), Event, Status (success for a success, retry when another attempt will follow, failed for a final failure), HTTP, Atmpt (the attempt number) and Details (the error message or the duration in milliseconds). Records older than 30 days are deleted automatically. The portal has no log, but a developer can read it through the REST API (REST API and API keys).

### How do you send new contacts to Google Sheets through Zapier?

1. In Zapier, create a new Zap and, as the Trigger, choose "Webhooks by Zapier", then "Catch Hook".
2. Copy the address Zapier gives you (Webhook URL).
3. In QR vCard Pro → Webhooks, create a webhook with that address and select only Contact received as the event. Save the secret key, even though Zapier does not ask for it.
4. Send a test contact through the form on your card, so that Zapier gets a real sample with the name, email and phone fields. The Test button checks the connection, but it sends a test event without contact data, so it is not enough for mapping the fields.
5. In Zapier, click Test trigger, select the received request and add the Google Sheets → Create Spreadsheet Row action. Map the spreadsheet columns to the fields from the data object (name, email, phone, company).
6. Turn on the Zap. Because the webhook was created by the administrator, contacts from all of the company's cards arrive in the spreadsheet.

In Make, the procedure is the same: in a new scenario, add the Webhooks module with the Custom webhook trigger, copy the address Make displays and enter it as the webhook URL. Make detects the data structure from the first request it receives, so here too, send a test contact through the form.

> **Watch out:** the meta field in the Card created and Card updated events may not contain the changes from that same save, and for a new card it is often empty. If you need the exact card data, read it through the REST API after the event, with `GET /cards/{id}`. Updating a card through the API without the title field does not send the Card updated event.

**Watch out:** deleting a card on the portal moves it to the trash and does not send an event. Card deleted arrives only on permanent deletion: when the trash is emptied in wp-admin, when the card is deleted through the API or when an employee is removed. Scan recorded is not sent for ordinary card openings or for clicks, and it is not sent at all if "Log QR code scans" is turned off in QR vCard Pro → Settings → Privacy and GDPR.

**Note:** the Contact received event does not contain the contact's tags, the name of the event (from Events), campaign tags, custom form fields or the country. The `X-QRVP-Delivery` header is new on every attempt, so recognize a repeated delivery of the same event by the event key and the contact or card number.

REAL-WORLD EXAMPLE

A real estate agency has eight agents with cards. The administrator creates a webhook with the Contact received event that points to a Make scenario, which writes every contact to a shared Google Sheets spreadsheet and sends a short message to the sales team's channel. Because the webhook belongs to the administrator, contacts from all the agents' cards arrive. Each morning, the sales lead opens the spreadsheet and assigns the calls, with no forwarding of emails.

## 41. REST API and API keys

**Where:** QR vCard Pro → API keys; on the portal: *API keys*

**Who:** the Administrator, in wp-admin and on the portal, for all users' keys; the Card Manager, on the portal, only for their own keys

**Plan:** 5 Sites and higher (webhook addresses: Unlimited and higher)

> Does your developer or another business system need to read cards and contacts, or create them? Create an API key: the application uses it to identify itself to the software and can do exactly what the key and the account that created it allow.

The REST API is a set of addresses through which other applications talk to the software, for example an internal CRM, a mobile app or a reporting script. All addresses start with `https://yourdomain.com/wp-json/qrvp/v1`; the exact base URL of your site is also shown on the API keys screen. An API key is a password for an application and is sent with every request. Without the 5 Sites plan, the screen shows "The Public API requires the 5 Sites tier or higher." (on the portal, "API keys are not available on your tier").

### How do you create a key?

1. Open API keys: in wp-admin, the "Generate a new key" section; on the portal, "➕ New API key".
2. Enter a name and choose the permissions (described below). If you choose none, the key gets the read permission.
3. Click *Generate key* (wp-admin) or ✓ *Generate key* (portal).
4. Copy the key right away. In wp-admin, you see "✓ API key created successfully!" and "THIS IS YOUR ONLY CHANCE TO SEE THIS KEY", with a ready-made cURL command for testing; on the portal, "🔑 Your new API key (shown only once!)". The software stores only a protected hash of the key, so it cannot show the key again; if you lose it, create a new one and revoke the old one.

5. Test the key with a request to the `/me` address (the first example below).

**Options**

**Name (wp-admin) / Key name * (portal)**

Default: in wp-admin, an empty name becomes “API key created” followed by the date and time; on the portal, the field is required

The key's name, for your own reference; it is shown only in the key list. All keys have the same beginning in the Prefix column (`qrvp_liv...`), so you can tell them apart only by name.

**Example:** “Internal CRM, read only”.

**read: read cards, contacts, statistics (GET) (wp-admin) / Read: fetch cards, contacts and analytics (portal)**

Default: on

Allows requests that only read data (GET). For integrations that do not change anything, this permission alone is enough.

**Example:** a script that pulls scan statistics every night into an Excel report for management.

**write: create, update, delete (POST, PATCH, DELETE) (wp-admin) / Write: create and modify data (portal)**

Default: off

Allows requests that create, change and delete data (POST, PATCH, DELETE). Grant it only to applications that really need it, because a key with this permission can delete cards and contacts. Permissions cannot be changed after the key is created; for a different combination, create a new key.

**Example:** an HR system that automatically creates a card for every new hire.

**How do you manage and revoke keys?**

In wp-admin, the “Existing keys” list has the columns Name, Prefix, Scopes, Last used (the time and IP address, or “Never used”), Created, User (visible only to the administrator) and Action, with the *Revoke* button. On the portal, the “Active keys” list has the columns Name (with the creation date), Key, Permissions, Last used and Action (🗑). Revoking asks for the confirmation “Revoke this key? All applications using it will stop working.” and takes effect immediately: the key disappears from the list, and the application gets an error from its next request on. A key does not expire and stays valid until you revoke it. The IP address of the last use is for information only, because it may be the address of a proxy server.

**How is the key sent, and on whose behalf does it act?**

The key has the form `qrvp_live_` followed by 32 more characters, and it is sent in the header of every request:

```
Authorization: Bearer qrvp_live_YOUR_KEY
```

The key acts as the user who created it and has that user's permissions. A key belonging to the Administrator or a Card Manager sees all of the company's cards in the card list, while the keys of other users see only their own. The key's permissions determine the type of request: read for GET, and write for POST, PATCH and DELETE. There is no rate limit for requests made with a key; the public addresses have their own limits, listed in the table below.

**What if the server does not pass the Authorization header through?**

Some servers do not forward this header to WordPress, so even a valid key gets a 401 error. In wp-admin, in the "⚙️ Authentication diagnostics" section:

1. Call the diagnostic address with your key; the response shows whether the server sees the header (the key is shown truncated):

   ```
   curl -H "Authorization: Bearer qrvp_live_YOUR_KEY" https://yourdomain.com/wp-json/qrvp/v1
   ```

2. If the server does not see the header, click 🔧 *Fix .htaccess for API auth* and confirm. The button adds a rule that forwards the header; only the administrator sees it, and it works when the .htaccess file exists and the server is allowed to modify it.
3. If it still does not work, ask your hosting provider to enable forwarding of the Authorization header to PHP.

**Which addresses are available?**

All addresses are appended to the base URL `/wp-json/qrvp/v1`. Lists return data in the form `{"data": [...], "meta": {"page", "per_page", "total", "total_pages"}}` together with the X-WP-Total and X-WP-TotalPages headers.

| Method | Route | Purpose | Permission |
|---|---|---|---|
| **GET** | `/health` | status of the software and the database, for diagnostics | public |
| **GET** | `/debug/auth-headers` | whether the server forwards the Authorization header | public |
| **GET** | `/manifest` | the card's PWA manifest (card parameter) | public |
| **POST** | `/track` | records an action on a card (card_id, action); the same IP, card and action at most once every 30 seconds | public |
| **POST** | `/exchange-contact` | receives the contact exchange form from a card; one submission per IP address and card every 5 minutes | public; 5 Sites and higher |
| **GET** | `/me` | the key owner, the plan, the number of the owner's published cards, the authentication method and the key's permissions | read |
| **GET** | `/cards` | published cards, most recently modified first (page, per_page up to 100, search) | read |
| **POST** | `/cards` | a new card: title and card fields; respects the plan limit and the limit on cards per person | write |
| **GET** | `/cards/{id}` | a card with all its fields | read |
| **PATCH** | `/cards/{id}` | changes only the fields that are sent | write |
| **DELETE** | `/cards/{id}` | permanently deletes the card, without the trash | write |
| **GET** | `/cards/{id}/scans` | statistics: totals by action and by day, up to 90 rows (since, until) | read |
| **GET** | `/cards/{id}/qr` | the address contained in the card's QR code, without the image | read |
| **GET** | `/contacts` | contacts from the key owner's cards (page, per_page up to 100, card_id, search, method) | read |
| **POST** | `/contacts` | a new contact | write |
| **GET** | `/contacts/{id}` | a single contact | read |
| **DELETE** | `/contacts/{id}` | deletes a contact | write |
| **GET** | `/webhooks/events` | list of events (key and name) | read |
| **GET** | `/webhooks` | webhooks, without the secret key (the administrator sees all of them, others their own) | read; Unlimited and higher |
| **POST** | `/webhooks` | a new webhook: name, url and events (an array, comma-separated text or `*`); the response contains the secret key once | write; Unlimited and higher |
| **GET** | `/webhooks/{id}` | a single webhook | read; Unlimited and higher |

| Method | Route | Purpose | Permission |
|---|---|---|---|
| **PATCH** | `/webhooks/{id}` | update: name, url, events, is_active | write; Unlimited and higher |
| **DELETE** | `/webhooks/{id}` | deletes a webhook | write; Unlimited and higher |
| **POST** | `/webhooks/{id}/test` | sends a test event right away and returns the delivery record | write; Unlimited and higher |
| **POST** | `/webhooks/{id}/rotate` | a new secret key, shown once | write; Unlimited and higher |
| **GET** | `/webhooks/{id}/deliveries` | delivery records (limit from 1 to 100, default 20) | read; Unlimited and higher |

**Request examples**

Testing the key:

```
curl -H "Authorization: Bearer qrvp_live_YOUR_KEY" https://yourdomain.com/wp-json/qrvp/v1/me
```

The second page of the card list, 50 per page:

```
curl -H "Authorization: Bearer qrvp_live_YOUR_KEY" "https://yourdomain.com/wp-json/qrvp/v1/c
```

A new card (the phone and email fields are lists, with a label and a value):

```
curl -X POST https://yourdomain.com/wp-json/qrvp/v1/cards \
  -H "Authorization: Bearer qrvp_live_YOUR_KEY" \
  -H "Content-Type: application/json" \
  -d '{"first_name": "Laura", "last_name": "Bennett", "position": "Account manager", "compan
```

A new contact, with the consent information:

```
curl -X POST https://yourdomain.com/wp-json/qrvp/v1/contacts \
  -H "Authorization: Bearer qrvp_live_YOUR_KEY" \
  -H "Content-Type: application/json" \
  -d '{"card_id": 42, "name": "Anna Miller", "email": "anna@example.com", "phone": "+1202555
```

Card statistics for October:

```
curl -H "Authorization: Bearer qrvp_live_YOUR_KEY" "https://yourdomain.com/wp-json/qrvp/v1/c
```

**What should you watch out for with contacts?**

- `POST /contacts` requires `card_id`, a name and a valid email address; the card must be published and belong to the key owner, unless the key belongs to the Administrator or a Card Manager. The `consent_given` field (true or false) is stored and shown in Contacts. The allowed values for

`acquisition_method` are direct_form, post_save_modal, pre_save_cta, gated and bulk_import; the default is bulk_import, which the Contacts list shows as “CSV import”, and any other value is converted to it.

- A contact created through the API triggers the same things as a contact from the form: a notification to the card owner, the Contact received webhook and sending to Odoo, if it is set up. The automatic follow-up is not sent to such contacts.
- `GET /contacts` returns only contacts from cards owned by the key's account, even when that account is the administrator. The Administrator and Card Manager can read a single contact ( `GET /contacts/{id}` ) from someone else's card as well; you get the contact number, for example, from the Contact received webhook.
- The `method` filter accepts the values direct_form, post_save_modal, pre_save_cta, gated, bulk_import and scan; contacts from /l/ pages have no filter value of their own.

**Which errors can the API return?**

| HTTP | Code | Message | What to do |
|---|---|---|---|
| **401** | `qrvp_unauthorized` | “Authentication required. Send Authorization: Bearer <api_key>.” | send the header; if you are already sending it, check the diagnostics above |
| **401** | `qrvp_invalid_token` | “Invalid or revoked API key.” | check the key or create a new one |
| **401** | `qrvp_invalid_user` | “The owner of the API key no longer exists.” | create a key from an existing account |
| **403** | `qrvp_insufficient_scope` | “The API key lacks the required scope: write” (or read) | create a key with the required permission |
| **403** | `qrvp_tier_required` | “The REST API is available from the 5 Sites tier. Upgrade your license.” | check your plan (Plans, license and updates) |
| **429** | | too many requests to the public /track and /exchange-contact addresses | wait 30 seconds or 5 minutes, respectively |

**Watch out:** an incorrect or revoked key produces a 401 error even on public addresses, for example on `/health`, because the key is checked for all addresses under `/qrvp/v1`. Do not send the Authorization header to public addresses unless you have a valid key. The `/me` address is not public: it requires a key with the read permission.

**Watch out:** the `since` and `until` parameters in the statistics are interpreted in UTC, while the scan time is stored in the site's local time, so the period boundaries may be shifted by the time zone difference (one or two hours for a site on Central European Time, for example). For an exact monthly total, take one extra day at both ends and discard the excess by date. Every change made through the API also sends webhooks, just like a change made on screen.

REAL-WORLD EXAMPLE

An equipment distributor manages its customers in its own CRM. The administrator creates a “CRM, read and write” key with both permissions and hands it to the developer. When the CRM opens a new customer record, it uses `POST /cards` to create a card for the sales rep responsible for that customer, and every night it uses `GET /cards/{id}/scans` to pull the statistics into a report for management. When the work with the developer ends, the administrator revokes the key with one click.

## 42. Odoo ERP

**Where:** QR vCard Pro → ODOO ERP support (the Connection, Log and Guide tabs); on the portal: *ODOO ERP support*

**Who:** administrator only, in wp-admin and on the portal **Plan:** all plans

> Your sales run in Odoo, but contacts from the cards arrive by email and someone retypes them by hand? Connect the software to Odoo: every new contact becomes an opportunity or a contact in Odoo CRM, with its source and message, the moment it arrives.

The connector talks directly to your Odoo server through Odoo's API (JSON-RPC, at the Odoo server address with `/jsonrpc` added), with no additional software. Every new contact from any source reaches Odoo: the form on a card, the form on an /l/ page, the paper business card scanner and contacts created through the REST API. On the portal, the administrator has the same panel as in wp-admin (status, settings and test), plus the “Sync log” with the *Clear log* button.

**What do you need?**

- Odoo with access to the external API. The Guide tab states that self-hosted Odoo (Community or Enterprise), Odoo.sh and Odoo Online on the Custom plan have it, while the free plan and the Standard Online plan do not. Odoo sets the plan terms, and they may change, so check them with your Odoo partner. If the API is not available, you can send contacts to Odoo through Webhooks and services such as Zapier or Make.
- The CRM module in Odoo, if you send contacts as CRM opportunities.
- An Odoo user, that user's login email and that user's API key.

### How do you get an API key in Odoo?

1. Sign in to Odoo with the account you want to own the records the connector creates.
2. Open Settings → Users & Companies → Users and select that user, or open your own profile.
3. On the “Account Security” tab, click “New API Key”, enter a name, for example “QR vCard Pro”, and confirm with your password.
4. Copy the key right away, because Odoo shows it only once, and paste it into the *API key* field.

On self-hosted Odoo, the user must have a password set in order to create an API key.

### How do you connect, step by step?

1. Open QR vCard Pro → ODOO ERP support, the *Connection* tab, or the same item on the portal.

2. Fill in *Odoo URL*, *Database name*, *User (login email)* and *API key*, and choose what is created in Odoo and the other options. Leave the sending switch off for now.
3. Click *Save settings*; the message “Settings saved.” confirms that the settings were saved.
4. Click *Test connection*. The test works only with saved details. Success looks like this: “Successfully connected to Odoo. Server version: …”. Failure: “Connection failed. Check the details and whether the Odoo account has external API access.”, with the reason in parentheses. If one of the four fields is missing, the message is “Fill in all fields: URL, database, user and API key.”
5. Turn on *Enable sending contacts to Odoo* and save. The status at the top then reads “Active: new contacts are sent to Odoo.”
6. Send a test contact through the form on a card, then check the *Log* tab and the CRM in Odoo.

The status at the top of the panel always shows the current state: “Active: new contacts are sent to Odoo.”, “Configured but disabled: turn on the switch below to start sending.” or “Not set up: fill in the connection details below.”

**Options**

**Enable sending contacts to Odoo** Default: off

The main switch. Sending works only when all four connection details are also filled in: address, database, user and key.

**Example:** while your Odoo partner changes the CRM settings, turn sending off; contacts are still saved in Contacts.

**Odoo URL** Default: empty

“The address of your Odoo instance, without the trailing /jsonrpc.” Only addresses with http:// or https:// are accepted.

**Example:** `https://yourcompany.odoo.com` for Odoo Online or `https://erp.yourdomain.com` for your own server.

**Database name** Default: empty

The name of the Odoo database. For Odoo Online, it is usually part of the address; for your own server, your Odoo partner knows it.

**Example:** for the address `https://yourcompany.odoo.com`, the database is usually `yourcompany`.

**User (login email)** Default: empty

The email address that the user whose API key you created uses to sign in to Odoo.

**Example:** `crm@yourdomain.com`, a separate Odoo user just for integrations.

**API key** Default: empty

The key from Odoo (“Generated in Odoo: Settings → Users → API Keys.”), used instead of a password. A saved key is not displayed; the field then says “saved; leave empty to keep it”. An empty field keeps the old key when you save, and a new key replaces it. The key cannot be deleted through the form, so to stop sending, turn the switch off and revoke the key in Odoo.

**Example:** after the employee who created the key leaves, create a new key for the integration account in Odoo, paste it here and save.

**What to create in Odoo: “CRM opportunity (crm.lead), recommended” / “Contact (res.partner)”** Default: CRM opportunity

“A CRM opportunity goes into the sales pipeline; a contact only goes into the address book.” For sales, choose the opportunity; the contact option is for companies that want only an address book.

**Example:** a sales team chooses CRM opportunity, so that every contact from a trade fair gets a pipeline stage and a responsible salesperson.

**Assign the opportunity to the card owner (if Odoo has a user with the same email)** Default: on

The opportunity gets a salesperson: the Odoo user whose login email matches the email of the card owner's WordPress account. The email entered on the card is not compared, only the account email. If there is no such user, the opportunity is created without this assignment. Applies only to CRM opportunities.

**Example:** Mark, a sales rep, signs in to WordPress and to Odoo with the same address, so every opportunity from his card lands with him in Odoo right away.

**Add the visitor's message to the opportunity description** Default: on

Adds a “Message: …” line to the description. It also applies to contacts, where the message goes into the contact's note.

**Example:** a visitor writes “I would like a quote for 20 vehicles”, and the salesperson sees it in Odoo without opening any email.

**Tag (crm.tag), optional** Default: empty

A tag that every opportunity from the software gets; if it does not exist in Odoo, it is created. Applies only to CRM opportunities and is useful for filtering.

**Example:** “QR vCard”, so that you can see all opportunities from the cards in Odoo with a single filter.

### How are the fields mapped?

| Contact data | CRM opportunity (crm.lead) | Contact (res.partner) |
|---|---|---|
| **Name** | contact_name; the opportunity name in the form “Name (card name)” | name |
| **Email** | email_from | email |
| **Phone** | phone | phone |
| **Company** | partner_name, if entered | company_name |
| **Description** | description | comment |
| **Card owner** | user_id (salesperson), with the assignment option | not sent |
| **Tag from the settings** | tag_ids | not sent |
| **Fixed value** | | customer_rank = 1 (marked as a customer) |

The description consists of the lines “Source: QR vCard (card name)”, “Company: …”, “Message: …” (with the message option) and “Tags: …”, where the tags are the contact's tags, for example the name of the active event or the title of an /l/ page. If the name is missing, the email address is used instead, and if that is missing too, “Unknown contact”.

**What does the log show?**

The *Log* tab (on the portal, “Sync log”) keeps the last 40 records, with the columns Time (the site's local time), Status (“OK” or “Error”) and Details, for example “Contact #12 → crm.lead #345 (Mark)” or “#12 → crm.lead not created:” with the reason. As long as nothing has been sent, it shows “The log is empty. As soon as the first contact arrives after you enable it, an entry will appear here.” The *Clear log* button deletes all records.

**When is a contact sent, and what if sending fails?**

Sending happens immediately, at the same moment the visitor submits the form, and the visitor waits until Odoo responds: up to 20 seconds per call, and one contact can take up to five calls. A slow Odoo therefore slows down the form confirmation on the card. If sending fails, the contact remains in Contacts, and an Error entry is written to the log. There is no retry and no resend button, so enter such contacts in Odoo manually or export them from Contacts (Contacts: overview, tags, notes and export). Contacts successfully sent to Odoo count as real opportunities in the chapter ROI dashboard.

> **Watch out:** the salesperson assignment compares the Odoo account with the email of the card owner's WordPress account. Cards imported through Bulk Import belong to the administrator who imported them, so opportunities from those cards are assigned to that administrator, if they have an Odoo account with the same address (Bulk Import of cards from CSV).

**Watch out:** when you revoke or change the API key in Odoo, paste the new one right away and save the settings; until then, sending reports errors. If the log reports an error about an unknown field or model, your Odoo is probably missing the module that provides that field (for CRM opportunities, that is the CRM module); check this with your Odoo partner.

**Note:** the name of an event (from Events) arrives only as text in the description, in the “Tags:” line, not as an Odoo tag; the only Odoo tag is the one from the Tag field. Custom form fields and campaign tags are not sent. Contacts from the paper business card scanner also reach Odoo, so salespeople see contacts entered that way in the CRM too.

**REAL-WORLD EXAMPLE**

A building materials distributor has six sales reps and runs its sales in Odoo. The administrator sets up the connector with the CRM opportunity option, turns on the assignment to the card owner and enters the tag “Trade Fair 2026”. The sales reps sign in to WordPress and Odoo with the same addresses, so every contact from the fair arrives in Odoo as an opportunity assigned to that very sales rep, with the visitor's message in the description. After the fair, the sales manager sees all the opportunities from the fair with a single filter by tag.

# 43. Settings: structure and the General tab

**Where:** QR vCard Pro → Settings; on the portal: *Settings* | **Who:** Administrator only | **Plan:** all plans; White-label tab Agency only

> Looking for the place to change the portal address, the look, privacy or language? All of the software's settings are on one screen, divided into tabs, and only the administrator can change them.

The QR vCard Pro → Settings screen has a heading with the software name and version number. Each tab covers one area and has its own chapter in this guide:

| Tab | What you set | On the portal | Chapter |
|---|---|---|---|
| ***General*** | the portal address, re-running the setup wizard, data deletion on uninstall | yes, without the wizard | this chapter |
| ***Branding*** | the portal name, logo and portal color, the footer credit on cards | yes | Branding |
| ***White-label*** | the software's name, description, author and icon in the WordPress admin | no | White-label |
| ***Privacy and GDPR*** | scan logging, IP addresses, geo-location, retention period, legal links | yes, without the SEO block | Privacy and GDPR |
| ***Lead Capture*** | contact exchange on the card and the OpenAI API key | yes | Lead Capture: contact exchange on the card |
| ***Language*** | the language of the portal and of card labels, interface translation | yes | Portal language, card language and automatic translation |
| ***License*** | license activation and update checks | no | Plans, license and updates |

### How are settings saved?

1. Open the tab you need and change the values.
2. Click *Save changes* at the bottom of that tab. In wp-admin and on the portal alike, the confirmation reads “Settings saved.”
3. Only then move on to the next tab. Each tab is saved separately: if you switch to another tab without saving, the changes on the previous one are lost.

The *License* tab has no *Save changes* button. The license is activated and checked with that tab's own buttons, as described in the chapter Plans, license and updates.

#### What does the administrator see on the portal?

On the portal, only the administrator sees the *Settings* item in the menu. It contains the *General*, *Branding*, *Privacy and GDPR*, *Lead Capture* and *Language* tabs, with the same fields and the same values as in wp-admin: a change saved on the portal applies in wp-admin immediately, and the other way around. The portal has no *White-label* or *License* tab, its *General* tab has no panel for re-running the wizard, and its *Privacy and GDPR* tab has no SEO block; a note below the form refers you to the WordPress admin panel for White-label, the license, the wizard and diagnostics. The Card Manager does not see the settings in any form.

### General tab options

**Portal URL slug** Default: qr-portal · Portal address panel

The part of the portal address that comes after the site address. The site address is printed in front of the field and a slash after it, so you see the complete future address as you type. The field is required and accepts only lowercase letters from a to z, digits and hyphens; the browser will not let you save accented letters (such as é, ü or ñ), spaces or capital letters. Once you save, the portal page gets the new address immediately. Your portal currently opens at `https://your-site.com/qr-portal/`.

The *Current link* row below the field shows the address the portal actually has and opens it in a new browser tab. If the portal page does not exist, the row says "Page not yet created. Will be created automatically."

**Example:** a law office enters `business-cards`, so its lawyers open the portal at an address ending in `/business-cards/`, which they remember more easily than the default.

**Setup wizard** Re-run wizard panel · wp-admin only

The *Re-run wizard* → button opens the setup wizard again, with the fields already holding your current settings. Above the button you can see when the wizard was last completed ("Wizard completed: …"), and below it is the record of the license agreement acceptance, in the form "EULA: Version … accepted on … by …". Until you complete the wizard, every page of the software in wp-admin takes you back to it. The steps are described in the chapter Setup wizard.

**Example:** an agency that set up the site for a dental practice re-runs the wizard during a meeting with the practice owner, so that they go through branding, privacy and language together and the owner accepts the license agreement in person.

**Permanent deletion** Default: off · Data deletion on uninstall panel

The switch "Delete ALL data (cards, scans, settings) when the plugin is uninstalled" does nothing until you delete the plugin in WordPress Plugins with *Delete*. If it is on at that moment, cards, statistics, contacts, settings and the portal page are deleted irreversibly. If it is off, deleting the plugin leaves all data in the database, and the data comes back when you install the plugin again. Deactivation deletes nothing in either case. The exact list of what is deleted and what stays is in the chapter Deactivation, deletion and data retention.

**Example:** an IT company tried the software on a test site and no longer needs it; the administrator turns on Permanent deletion, saves the tab and only then deletes the plugin, so no test cards or contacts remain in the test site's database.

**Watch out:** the software does not redirect the old portal address to the new one. Expect old bookmarks, and portal links in messages sent earlier, to stop leading to the portal once you change the slug. Choose a slug that no other page on the site uses, check the *Current link* row after saving, and send the new address right away to everyone who uses the portal.

**Note:** the slug changes only the address. The title of the portal's WordPress page (“QR Portal” at installation) stays the same and is changed in WordPress Pages, while the name users see in the portal bar is set as described in the chapter Branding.

REAL-WORLD EXAMPLE

A real estate agency has twelve agents who edit their cards from their phones, and none of them could remember the default portal address. On the General tab, the administrator enters the slug `agents`, saves the changes and immediately opens *Current link* to confirm that the portal opens. The new address goes out to the agents with a request to delete the old bookmark. The same day, working on the portal, the administrator also enters a portal name the agents recognize on the Branding tab, so after signing in they see the name of their own agency.

## 44. Branding

**Where:** QR vCard Pro → Settings → Branding; on the portal: *Settings* → *Branding*; the Branding step of the setup wizard

**Who:** Administrator only **Plan:** all plans; hiding the footer credit on cards Agency only

> Do you want employees and clients to see your company's name and logo on the portal instead of a generic name? On the Branding tab you enter the portal name and choose the logo and the portal color, and on the Agency plan you can also remove the credit in the card footer.

The tab has four settings, and it is important to know where each one appears. The portal name and color change the portal, the logo also appears in QR codes and in the Google Wallet pass, and the only one that changes the public card is the footer credit. The colors and look of the card itself are set on each card, as described in the chapter Appearance: templates, free layout and colors. None of these four settings is used in the emails the software sends.

| Setting | Where it appears | Where it is not used |
|---|---|---|
| **Portal name** | the bar at the top of the portal; the heading of the portal sign-in form | the public card, emails, the title of the portal's WordPress page |
| **Logo** | the icon in the portal bar; the center of the QR code (Single Site and higher); the Google Wallet pass; the image picker employees use on the portal | as the logo on the card itself (the card has its own logo field), emails |
| **Accent color** | buttons, icons and accents on the portal and on the sign-in page; the background of the Google Wallet pass | the public card, emails |
| **Footer credit** | the footer of the public card | the portal, emails |

### Options

**Portal name** Default: QR Portal

The name shown in the bar at the top of the portal and as the heading of the portal sign-in form. It accepts up to 60 characters; an empty field brings back “QR Portal”. The name is not multilingual: portal users in every language see the same text, so choose a name that everyone understands.

**Example:** an IT company enters “Nova Tech: digital business cards”, so employees see on the sign-in screen right away that they are in the right place.

**Logo** Default: no logo

The *Choose logo*, *Change logo* and *Remove* buttons select an image from the WordPress Media Library. The screen recommends a square PNG or SVG image of at least 200 × 200 pixels and no more than 100 KB; the software does not check this, but a large image only slows down loading. By default WordPress does not allow SVG uploads, so PNG is the safest choice.

The logo is used in four places: as a 36 × 36 pixel icon in the portal bar, in place of the default icon; in the center of card QR codes, on Single Site and higher (on 5 Sites and higher a card can also have its own logo, and this one is used when it has none, see QR code: download, logo and printing); in the Google Wallet pass; and in the image picker on the portal, where employees always see it and can therefore put it on their own card.

**Example:** a dental practice on the Single Site plan uploads its logo, so it appears in the center of the QR code on the printed cards of all its dentists and in the portal bar.

**Accent color** Default: #c2410c (orange)

The color of primary buttons, icons and accents on the portal, including the sign-in page; the software calculates a slightly darker shade for mouse hover on its own. The same color is the background of the Google Wallet pass. The description below the field also mentions landing pages, but the public card uses its own colors, which are set on the card. An invalid entry brings back the default color.

**Example:** a law office picks the dark blue from its visual identity, so the portal and its lawyers' Google Wallet passes look like parts of the same system.

**Footer credit** Default: on · hiding works only on the Agency plan

The switch determines whether a credit for the software is shown in the footer of the public card. Only card visitors see the credit, never portal users. The choice is saved on every plan but respected only on the Agency plan: on lower plans the credit is shown even when the switch is off. The switch text also names the software's author, but the card shows only the software name and the name of the vendor's company.

**Example:** an agency on the Agency plan that builds cards for its clients under its own name turns the switch off, so a visitor sees no third-party name on the card.

### What exactly does the card footer say?

| Plan | Footer credit | Can be hidden |
|---|---|---|
| **demo mode and Personal** | “Made with … free · Try it →”, with the product name; the “Try it” link leads to free sign-up with the vendor | no |
| **Single Site, 5 Sites, Unlimited** | “Powered by” with the software name and the name of the vendor's company | no |
| **Agency** | the same as on the paid plans; when White-label is active, your software name and your vendor name appear instead of the original names | yes, by turning off Footer credit |

**Watch out:** if you turn off Footer credit on a plan below Agency, the choice is saved even though it has no effect, so the credit disappears by itself as soon as you move to Agency. Conversely, the Branding step of the setup wizard always sets Footer credit back to on: after every re-run of the wizard on the Agency plan, check this switch.

**Note:** the Branding step of the setup wizard offers the same fields, except Footer credit. The software's name in the WordPress admin is not changed here but as described in the chapter White-label.

REAL-WORLD EXAMPLE

A building materials distributor with twenty sales reps buys the Single Site plan. On the Branding tab, the administrator enters the portal name “BuildPlus: team cards”, uploads a square logo and picks the company's green. After signing in, the sales reps see the portal in the company colors, and the QR codes on their cards get the logo in the center. The administrator sets the colors of the cards themselves once, on a card, and the others adopt them, while the footer credit on the cards stays, because only Agency hides it.

## 45. White-label

**Where:** QR vCard Pro → Settings → White-label (wp-admin only) **Who:** Administrator only **Plan:** Agency only

> Do you deploy the software for your clients as your own product? White-label changes how the software presents itself in the WordPress admin and in the credit on cards, but only on the Agency plan and only once you enter a name.

White-label becomes active only when three conditions are met: the license is Agency, the *Enable white-label* switch is on and the *Plug-in name* field is not empty. If any of these conditions stops being met, for example the license expires or you move to a lower plan, everything reverts to the original names on its own, and the fields you filled in stay saved. On lower plans the tab shows a locked screen, “White-label is an Agency feature”, with a *View the Agency tier* → button and no fields.

### How do you turn it on?

1. Open QR vCard Pro → Settings → White-label.
2. Turn on *Enable white-label* and enter the *Plug-in name*; without a name nothing changes.
3. Fill in *Your name (vendor)*, *Your website (vendor URL)* and *Support / docs URL*, so that no label or link points to the original vendor.

4. Click *Save changes* and open WordPress Plugins: the plugin already carries your name there.
5. In QR vCard Pro → Settings → Branding, also enter the *Portal name*, because the bar and the sign-in form on the portal do not use the White-label name.

**What changes and what stays the same?**

**Changes when White-label is active**

- the plugin's name, description, author and links in WordPress Plugins, plus a “Support” link below the plugin;
- the name and icon of the main menu item in wp-admin;
- the title of Home and the title of the Settings screen in wp-admin, as well as the name of this guide in wp-admin and on the portal;
- the “Powered by” credit in the card footer;
- the subject line of the new contact email, which starts with your name in square brackets: “[your name] New contact from your QR card”.

**Stays original**

- the setup wizard;
- the “License status” notice and the message about reaching the card limit;
- the titles of the software's pages in the browser tab;
- the window with the details of a new version during an update;
- the subtitle of the portal's Home and the greeting on first entry to the portal;
- the footer of the email used to share a card;
- the description of the “Verified” badge on the card;
- the text of the license agreement and the links to the license server and to purchasing.

The bar and the sign-in form on the portal use the *Portal name* from Branding. Emails for team invitations, employee welcome messages, reviews and pages use the name of the WordPress site, so align that name as well, in WordPress Settings → General.

**Options**

**Enable white-label** Default: off

The main switch, with the text “Turn on all white-label overrides”. When you turn it off, everything reverts to the original names, while the fields below stay saved, so you can turn White-label on again later without entering anything twice.

**Example:** an agency temporarily turns White-label off while sending the vendor's support team a screenshot of an error, and turns it back on right afterward.

**Plug-in name** required for White-label · up to 60 characters

Replaces the software's original name in the Plugins list, in the name of the main menu item, on Home, in the title of the Settings screen, in the name of this guide, in the “Powered by” credit on the card and in the subject line of the new contact email. While the field is empty, White-label is not active even when the switch is on.

**Example:** an agency enters “Card Pro”, so its client sees that name in the menu, on Home and in the subject line of the new contact email.

**Plug-in description** up to 200 characters

The description below the plugin name in WordPress Plugins. It is used only when it is not empty; otherwise the original description stays.

**Example:** “Digital business cards with QR codes for your team, supported by the Studio North agency.”

**Your name (vendor)** up to 80 characters

The name that follows the dot in the “Powered by” credit on the card and, when *Hide the original author* is on, the name of the plugin author in the Plugins list. If the field is left empty, the original vendor's name appears in both places.

**Example:** an agency enters “Studio North LLC”, so the card footer reads “Powered by Card Pro · Studio North LLC”.

**Your website (vendor URL)**

Used only in the Plugins list, as the author link and the plugin site link, and only when *Hide the original author* is on. The credit in the card footer is not a link, so this address does not appear there. An address entered without `https://` gets it added automatically. If the field is left empty, the author link leads to the original vendor's website.

**Example:** an agency enters `studionorth.com`, so clicking the author name in the Plugins list opens the agency's website.

**Support email**

The support address that the client's administrator sees at the top of the *Complete guide*, in the *Support:* row, as a link for sending an email. While White-label is active, the guide shows only the address you entered here; if you leave the field empty, no support address is shown. An invalid address is cleared on save. The Card Manager, employees and team members do not see the *Support:* row, because they turn to their own company's administrator.

**Example:** an agency enters `support@studionorth.com`, so a client administrator who is reading the guide writes to the agency with one click, not to the software vendor.

**Support / docs URL**

The address of the “Support” link that appears below the plugin in WordPress Plugins while White-label is active. That is the only place where it is used; the Complete guide does not show this link, because the complete manual is already in the menu. An address without `https://` gets it added automatically. If the field is empty, the “Support” link leads to the original vendor's documentation.

**Example:** an agency enters the address of its help page, so a client administrator goes from the plugin list straight to the agency's form for reporting a problem.

**Admin menu icon** Default: business card icon (dashicons-id-alt)

The icon of the main menu item. Enter the name of a WordPress icon starting with `dashicons-`, for example `dashicons-businessperson` (the list is at developer.wordpress.org/resource/dashicons), or the full address of an image in SVG or PNG format. For an image, use a small square icon, for example 20 × 20 pixels, like the ones in the left menu. An entry that is neither of the two does not produce a working icon. The White-label tab has no logo upload; the logo for the portal, the QR code and the Google Wallet pass is chosen in Branding.

**Example:** an agency sets the address of its small SVG icon, so the client recognizes the agency's tool in the left menu by the agency's mark.

**Hide the original author** Default: on

In the Plugins list, the plugin author becomes *Your name (vendor)*, the author and plugin site links lead to *Your website (vendor URL)*, and the links to the plugin details and to wordpress.org are removed from below the plugin. The window with the details of a new version during an update still shows the original author.

**Example:** an agency's client opens the plugin list and sees the agency as the author of the software, with a link to the agency's website.

**Watch out:** on plans below Agency the tab has a *Save changes* button even though it has no fields; clicking it saves *Hide the original author* as off. That is why, after moving to Agency, you should check this switch first. Empty *Your name (vendor)*, *Your website (vendor URL)* and *Support / docs URL* fields leave the original vendor's name and addresses in those places, so fill them in before you hand the site over to the client.

**Note:** while White-label is active, the *Privacy and GDPR* tab shows a blue “White-label active” box above the legal links, with a recommendation on who should enter the legal pages; see Privacy and GDPR. On the Agency plan you can also remove the credit in the card footer completely, with the Footer credit switch in Branding.

REAL-WORLD EXAMPLE

An agency on the Agency plan maintains websites for six clients and offers each of them digital business cards as its own service. On a hotel's site, it turns on White-label and enters the name “Card Pro”, its own name and website address, its support page and its icon, and in Branding it turns off Footer credit and enters the hotel's portal name. It also aligns the WordPress site name, so that emails to employees arrive under the hotel's name. The hotel's front desk and management see the name of the hotel or of the agency everywhere, and when they need help, they contact the agency through the “Support” link.

## 46. Privacy and GDPR

**Where:** QR vCard Pro → Settings → Privacy and GDPR; on the portal: *Settings* → *Privacy and GDPR* (without the SEO block); consent banner: QR vCard Pro → Marketing → Pixels

**Who:** Administrator only **Plan:** all plans

> Do you need to know what the software records about visitors and whether it sends anything outside the site? By default it records card opens without the full IP address and without external services; you turn on every further step yourself, on this tab.

The settings on this tab apply to the whole site and to all cards. The introduction on the tab states that the default values are set for compliance with GDPR (EU), CCPA (USA) and ZZPL (Serbia). The software gives you the switches, while the company that uses the cards is responsible for the legal basis for processing and for the text of the privacy policy.

### What is recorded when someone opens a card?

Every card open and every click on a card writes one record to the statistics, called a scan. What the record contains depends on the settings:

| Data | When it is recorded |
|---|---|
| **the card, the time, the event type (card open, Save contact, a click on the phone number, email, website, a social network or the map), the card's active event and the campaign UTM tags** | always, while scan logging is on |
| **a hash of the IP address** | when Hash IP for unique visitors is on |
| **the IP address (shortened or full)** | only when Geo-location is on |
| **country, region and city** | when Geo-location is on; on a site behind Cloudflare, the country, and sometimes the city, always |
| **device type, operating system, browser and the full User-Agent text** | when Device / browser type is on |

A scan does not contain the visitor's name, email or phone number. Those details are left only by a person who fills in the contact exchange form of their own accord, and they are stored separately, in Contacts (Lead Capture: contact exchange on the card).

### Options

**Master toggle** Default: on

The switch “Log QR code scans”. When you turn it off, the software records nothing: no card opens, no clicks, no Save contact. Cards, QR codes and contact exchange work normally, but Analytics, Team analytics, Events, campaigns, the ROI dashboard and the scan counter on Home receive no new data. Scans already recorded stay until the period set in the Scan retention field runs out.

**Example:** a law office whose internal rules do not allow any visitor tracking turns logging off and uses its cards purely as digital business cards.

**IP anonymization** Default: on

The switch “Anonymize IP addresses (recommended)”. Before any processing, the software shortens the IP address: for an IPv4 address the last number becomes 0 (192.168.1.45 becomes 192.168.1.0), and for an IPv6 address the last 80 bits are deleted. The shortened address is used for both the hash and geo-location. As a consequence, visitors from the same address block are counted as one unique visitor, so the unique counter can be lower than the actual number of people.

**Example:** a dental practice keeps anonymization on, because having no full patient IP addresses in its database matters more to it than an exact count of unique visitors.

**Hash IP for unique visitors** Default: on

The switch “Store SHA256+salt hash of IP (for the "unique" counter)”. Instead of the IP address, its one-way hash is stored (SHA-256 with a secret value from your site's WordPress configuration); the address cannot be recovered from it, but the same visitor always produces the same hash. The unique visitor counter in analytics relies on this. When the switch is off, nothing derived from the IP address is stored (unless Geo-location is on), and the unique counter shows 0. If anonymization is off, the hash is calculated from the full address: counting is more precise, but the data is still pseudonymized personal data.

**Example:** an exhibitor at a trade fair wants to know how many different people opened its team's cards, so it keeps the hash on; repeated opens by the same visitor then do not inflate the result.

### Geo-location Default: off

The switch “Send IP addresses to ip-api.com to determine country/city”. When it is on, the visitor's IP address is also stored with every new scan, shortened if anonymization is on and full otherwise. A job scheduled once an hour sends up to 100 such addresses to the external service ip-api.com and stores the country, the country code, the region and the city. The connection to that service is not encrypted (HTTP), and the IP address stays in the database after processing as well, until the scan is deleted under the period set in the Scan retention field. Turning the switch on applies only to new scans; older scans stay without a location. While it is on, the tab shows a “⚠ GDPR note:” box with a suggested sentence for your privacy policy.

If the site is behind Cloudflare, the country (and sometimes the city) comes from Cloudflare and is stored without this option and without any external call.

**Example:** an exporter that exhibits at trade fairs abroad wants to see which countries scans come from, so it turns on geo-location only after adding a sentence about the ip-api.com service to its privacy policy.

### Device / browser type Default: on

The switch “Parse User-Agent (device, OS, browser)”. From the data the browser sends with every request (User-Agent), the software on your server extracts the device type, operating system and browser and stores them together with the full User-Agent text, up to 255 characters. Nothing is sent to a third party. When the switch is off, none of this is stored and the per-device statistics stay empty.

**Example:** a real estate agency sees that almost everyone opens its agents' cards on a phone, so it prepares the photos for its cards in portrait format.

### Scan retention Default: 365 days · from 0 to 3650

Once a day the software deletes scans older than the number of days entered; 0 means keeping them forever. Every save of the tab reschedules the deletion, so the first deletion after a save happens about an hour later, and after that once a day. Retention deletes only scans: contacts, webhook delivery logs and other data stay until you delete them yourself.

**Example:** a company whose internal rules require visit statistics to be kept for no longer than six months enters 180.

**Show notice** Default: off · Privacy notice on the landing page section

The switch “Display a brief privacy notice in the landing page footer”. When it is on, the public card shows the line “ⓘ See also Privacy Policy, Terms of Service, and Cookie Policy.” below its footer, with links to the pages whose addresses you entered in the fields below. Only the policies that have an address are included in the line; for the privacy policy, if you leave the field empty, the page selected in WordPress Settings → Privacy is used. The data processing agreement (DPA) is not shown there. This way any visitor can open the privacy policy, not only someone who fills in the contact exchange form. Before turning the switch on, enter the addresses of the policies you want visitors to see.

**Example:** a real estate agency that uses Google Analytics on its cards enters the addresses of its privacy policy and its cookie policy and turns on this option, so a visitor opens both policies directly from the card.

**Privacy policy URL**

The address of your privacy policy. If the field is empty, the privacy policy page selected in WordPress Settings → Privacy is used, and if there is no such page, your site address with `/privacy-policy/` appended. An address entered without `https://` gets it added automatically.

**Example:** a law office enters the address of its “Privacy Policy” page, which is located at a different address on its site than the default one.

**Terms of Service URL**

The address of your terms of service. If the field is empty, your site address with `/terms-of-service/` appended is used.

**Example:** a company whose terms are on the page `/terms-and-conditions/` enters that page's full address, so that the link in the form does not lead to a page that does not exist.

**Data Processing Agreement (DPA) URL**

The address of your data processing agreement. If the field is empty, your site address with `/dpa/` appended is used.

**Example:** an IT company that already provides its clients with a data processing agreement publishes it as a PDF and enters the PDF's address.

**Cookie Policy URL**

The address of your cookie policy. If the field is empty, your site address with `/cookie-policy/` appended is used.

**Example:** a company enters the address of its cookie policy, in which it has also listed the cookies from the table further down in this chapter.

**Allow cards to appear in search engines** Default: off · wp-admin only, its own Save button

The “SEO: cards appearing in search” block below the main form has its own *Save* button, separate from the *Save changes* button. When this option is on, cards can appear in Google search results, not only through a link or a QR code. Individual cards are excluded on the card itself, and the other options are in SEO and search visibility, which the link “More options in Marketing → SEO →” also leads to.

**Example:** Anna, a consultant, wants clients to find her when they search Google for her name, so she turns on indexing and excludes her employees' personal cards one by one.

**Where does the visitor see the legal links?**

In the contact exchange form on the card, next to the consent checkbox, the text reads “I agree that [card owner's name] may contact me and confirm I have read the Privacy Policy, Terms of Service, and Data Processing Agreement.” Below it is the line “ⓘ See also Cookie Policy.” All four links are always shown, and they open in a new browser tab. The contact exchange form is available on 5 Sites and higher.

When *Show notice* is on, the links to the privacy policy, the terms of service and the cookie policy are also visible below the footer of the public card, for every visitor, not only in the contact exchange form.

**Watch out:** if you leave a field empty and no page exists at the default address (for example your site address with `/dpa/`), a visitor who clicks the link lands on a page that does not exist. Enter the real addresses or create pages at exactly those addresses. WordPress has a built-in privacy policy generator, which the “💡 No legal pages yet?” tip on this tab leads to.

While White-label is active, a blue “White-label active” box above the legal links gives a recommendation for each scenario: when you install the software for a client on the client's own site, leave the fields empty, because the client is the data controller and has its own policy; when all your clients are on your site, enter your own addresses; in a WordPress network (Multisite), each site sets its own fields.

**How does the cookie consent banner work?**

The banner is not configured on this tab but in QR vCard Pro → Marketing → Pixels. The rule applies to all codes that use cookies: Google Analytics and Google Tag Manager from the Marketing module, and the advertising pixels. What the banner looks like to the visitor is described in the chapter The public card: what visitors see and can do, and when the pixels load is described in the chapter Retargeting pixels.

**Require visitor consent before loading the codes (recommended, GDPR)** Default: on · Marketing → Pixels

While this rule is on, no measurement or advertising code loads until the visitor clicks *Accept*. The banner appears only when three conditions are met: the rule is on, the cards have at least one code (a Google Analytics or Google Tag Manager ID in the Marketing module, or at least one pixel), and the visitor has not made a choice yet. The banner text is “This page uses cookies for analytics and advertising. You can accept or decline. Without your consent, none of it is loaded.” Below the text are the *Decline* and *Accept* buttons. The choice is remembered for one year. After *Accept* the page reloads, and only then do the codes load; after *Decline* the banner disappears and nothing loads. If you turn the rule off, the codes load immediately, without a banner; do this only if you have another legal basis and your own consent mechanism. The banner exists only on card pages.

**Example:** a company that uses the Meta pixel on its cards keeps the rule on, so visitors from the EU get a choice before the pixel loads.

### Which cookies does the software set?

If you are writing a cookie policy, these are the cookies that the software itself sets:

| Cookie | Who gets it | What it is for | Duration |
|---|---|---|---|
| `qrvp_consent` | a card visitor who clicks Accept or Decline | remembers the choice made on the consent banner | one year |
| `qrvp_lang` | a card visitor or a portal user who chooses a language | remembers the chosen language | 30 days |
| `qrvp_utm` | a visitor who arrives at the site through a link with UTM tags | links the visit to a campaign | 30 days |
| `qrvp_flash` | a user who is not signed in, on the portal sign-in page | shows a message after the form is submitted, for example about a wrong password | 10 minutes |

The software sets these four cookies without the consent banner, because the consent rule applies only to codes from the Marketing module and to pixels; take this into account when you write your cookie policy. Signed-in portal users also get the standard WordPress login cookies, and after consent, Google Analytics and the pixels set their own cookies, which are described in those services' documentation.

### What is recorded when the license agreement is accepted?

The license agreement (EULA) is accepted in the setup wizard. At that point the software records the agreement version, the date and time, the WordPress user who accepted it (their ID, username and email), the site address, the IP address of the computer from which the agreement was accepted, without shortening, and the software version. You can see the record on the *General* tab in wp-admin and at the *Ready* step of the wizard. When the wizard is completed again, the new acceptance replaces the old record. The record stays in the database until you delete the plugin with Permanent deletion.

### How do you handle a request for access to data or for its erasure?

WordPress has the tools Tools → Export Personal Data and Tools → Erase Personal Data, which look up data by email address. The software registers in these tools with an item called “Scans”, but that item returns and deletes

nothing: scans are not tied to a name or an email, so there is nothing to find. Contacts from contact exchange (name, email, phone, company, message) are not covered by these tools, so you handle the request manually:

1. Open QR vCard Pro → Contacts, enter the person's email in the “Search by name / email / company…” field and click *Search*.
2. For an access request, send the person the data from the rows found: name, email, phone, company, message, card and date, as well as any tags and notes you added.
3. For an erasure request, click *Delete* in each row found and confirm.
4. Also check the places the contact was forwarded to earlier: the notification emails to the card owner, Odoo and the webhook addresses. Deleting the contact in Contacts does not delete these copies.

**What does the software add to the WordPress Privacy Policy Guide?**

To the WordPress Privacy Policy Guide, which you reach from WordPress Settings → Privacy, the software adds suggested text: that scan statistics are recorded, that the IP address is shortened before it is stored, and that the device, operating system and browser are extracted from the User-Agent data. The text is always the same and does not reflect your settings. If you have turned off anonymization, turned on geo-location or use contact exchange, extend your privacy policy yourself.

**What data leaves your site?**

| Feature | What is sent | To whom | When |
|---|---|---|---|
| **Geo-location** | visitors' IP addresses, shortened if anonymization is on | ip-api.com, over an unencrypted connection | only when it is on |
| **Auto-translate, interface translation, AI assistant** | the text being translated or processed | OpenAI | when someone runs the tool |
| **Paper business card scanner** | the photo of the business card | OpenAI | with every scan |
| **Google Wallet and the Marketing module** | the data needed for the pass, or the requests for reports | Google | when they are set up and turned on |
| **Google Analytics, Tag Manager and pixels** | loaded in the visitor's browser | Google, Meta, LinkedIn | after consent, while the rule is on |
| **Odoo and Webhooks** | contact data | the addresses you enter | when they are set up |
| **License and update checks** | the license key, the site address and the software version | the vendor's license server | while a key is entered: the license check once a day, the update check at most once every 12 hours |

**Watch out:** reducing the number of days in the Scan retention field deletes the older scans at the next deletion run, and this cannot be undone. Analytics, Events and the ROI dashboard are left without data for that period, so export the statistics before reducing the value, if your plan allows it (Analytics: what is measured and where to see it). If you turn on Geo-location, name ip-api.com in your privacy policy and keep the retention period short, because IP addresses stay in the database until the scan is deleted.

REAL-WORLD EXAMPLE

A law office with clients in its home country and in Austria works on the 5 Sites plan. The administrator keeps the default logging settings, enters 180 for Scan retention and fills all four legal link fields with the real addresses of pages on the office's website, so the contact exchange form no longer leads to pages that do not exist. The consent rule in Marketing → Pixels stays on, because the office uses Google Analytics on its cards. When a former client asks for their data to be erased, the office finds the client in Contacts by email address, deletes the record and also removes it from its Odoo database.

## 47. Portal language, card language and automatic translation

**Where:** QR vCard Pro → Settings → Language; on the portal: *Settings* → *Language*; OpenAI key: QR vCard Pro → Settings → Lead Capture

**Who:** Administrator; the Auto-translate button: everyone who edits cards **Plan:** all plans

> Your employees, clients and visitors do not all speak the same language? The software distinguishes the portal language, the language of the labels on the card and the language of the card content, and each of them is chosen in its own way.

Three things are often confused:

- **Portal language**: the language of the labels, buttons and messages on the portal and on the software's pages in wp-admin. The administrator sets it with the *Portal language* field, and each portal user can choose a different language for themselves in the language picker.
- **Card label language**: the language of the buttons and labels the visitor sees on the public card, for example *Save contact*. It is determined by the visitor's browser, *Auto-detect language* and *Default landing language*.
- **Card content language**: the text you entered yourself for each language, for example the position, description and address. It is always chosen by the language of the visitor's browser or by the visitor's choice in the picker; entering content per language is described in the chapter Multilingual cards.

The WordPress site language (WordPress Settings → General) serves as the fallback when no other rule decides.

**Which language applies where?**

| Place | Order of decision |
|---|---|
| **the software's pages in wp-admin** | Portal language; if it is empty, the WordPress language (of your profile, otherwise of the site) |
| **the portal** | the choice made in the language picker; then Portal language; then the site language |
| **labels on the public card** | the choice made in the picker; then the browser language, if Auto-detect language is on; then Default landing language; then the site language |
| **content of the public card** | the choice made in the picker; then the browser language, always, regardless of Auto-detect; then the site language |

### Options

**Portal language** Default: Use WP site language · Portal (you and your clients) section

The dropdown offers 13 languages and the item “Use WP site language”. The selected language applies to the software's pages in wp-admin and to the portal, for all users. On the portal, each user can choose a different language for themselves with the language picker; that choice applies in their browser for 30 days and does not affect anyone else. In wp-admin there is no picker, and only this setting applies. The rest of the site stays in the language set in WordPress.

**Example:** a company in Slovenia whose website is in English chooses Slovenščina, so the employees use the portal in Slovenian while the website stays in English.

**Auto-detect language** Default: on · Landing pages (visitors) section

The switch “Automatically detect language from visitor's browser”. The labels on the public card adapt to the language the visitor has set in the browser, if that language is one of the 13 offered; if it is not, the next language in the browser's list is checked, and then *Default landing language*. The switch affects only labels and buttons. The card content is always chosen by the browser language, even when the switch is off.

**Example:** an export company keeps detection on, so a buyer from Germany sees the buttons on the card in German, and a buyer from France sees them in French.

**Default landing language** Default: Use WP site language

The language of the labels on the card when detection finds no supported language or is turned off. An empty value means the WordPress site language.

**Example:** a company that works mostly with foreign partners chooses English (US), so visitors whose browser asks for, say, Polish or Greek get English labels instead of labels in the site language.

### Which translations are included?

The software ships with interface translations for 11 languages: Srpski, English (US), English (UK), Deutsch, Français, Español, Hrvatski, Slovenščina, Русский, 日本語 and 简体中文. The same languages are offered in the language picker on the card and on the portal. The dropdowns in the settings also offer Македонски and Italiano, but no translation is shipped for them. If one of these two languages is selected in the settings, or a visitor gets it through

automatic detection, the labels are shown in Serbian, the software's source language. The *Translation status* section on the tab shows the state of each language: ✓ means that the translation is available, and … that it is not included.

> **Watch out:** a visitor whose browser asks for Italian or Macedonian first gets Serbian labels on the card, because detection finds that language in the list but there is no translation for it. Do not choose these two languages for *Portal language* or for *Default landing language*. If you expect many such visitors, turn off Auto-detect and choose English for Default landing language: then everyone who does not choose a language in the picker themselves sees English labels, including visitors from Germany.

**How does the language picker work?**

On the card, in the top right corner, in the portal bar and on the portal sign-in form there is a dropdown with the 🌐 icon and 11 languages. The choice applies for 30 days in that browser, for both cards and the portal. A language code added to the end of the card address has the same effect, for example `…/q/your-slug?lang=de_DE`. The codes are: `sr_RS`, `en_US`, `en_GB`, `de_DE`, `fr_FR`, `es_ES`, `hr`, `sl_SI`, `ru_RU`, `ja` and `zh_CN`.

**Automatic translation: what does it translate and where do you enter the key?**

Both translation tools use OpenAI (the gpt-4o-mini model) and your OpenAI API key. The key is entered in one place: QR vCard Pro → Settings → Lead Capture, in the "🌐 Multilingual support" section, in the *OpenAI API Key* field. The *Check key* button checks immediately whether the key works. The same key is also used by the AI assistant and the Paper business card scanner. If you see DeepL mentioned in the descriptions on the screen, ignore it: translation works exclusively through the OpenAI key, and you need neither a DeepL account nor a DeepL key.

The screen shows cost estimates: on the Lead Capture tab "Cost ~$0.0001 per 1,000 characters", and on the Language tab "Estimated cost: ~$0.10 per language, ~$1 for all languages." The software does not measure costs; OpenAI charges them directly to your account, according to its own price list.

**Auto-translate (✨)** on multilingual card fields and Lead Capture texts · requires the OpenAI key

The button translates one field from Serbian, the source language, into all 10 other languages at once and fills in the other language tabs of that field. The translation is saved only when you save the card or the settings, so you can check and correct it before then. If the Serbian tab is empty, the button reports an error. Everyone who edits cards sees the button, in wp-admin and on the portal, employees included, and every click uses credit on your OpenAI account. A single user can send at most 20 requests per minute; a very long text can exceed the waiting time, in which case the message suggests that you try again or shorten the text.

> **Example:** a sales rep writes a description in Serbian, clicks Auto-translate and within a few seconds has the description in German and English, which the rep only needs to check before saving.

**Auto-translate missing UI translations** Language tab · Administrator only · requires the OpenAI key

This tool translates the software's own labels (buttons, messages, field names) that are missing from the shipped translation, most often messages added in a newer version. The "🔍 Load missing translation statistics" button shows a table with the columns Language, Coverage (the percentage of translated messages), Missing and Action. The *Translate (N)* button translates the missing messages of one language, and "🚀 Translate all missing (all languages)" goes through all languages one after another, after you confirm that the job may take 2 to 3 minutes. The log below the table shows how many messages were translated and how many tokens were used.

The tool works for the 10 shipped languages other than Serbian; it cannot create a translation for Македонски or Italiano. The result is written to your own translation files on the server, which take precedence over the shipped translations and remain after software updates. When a new version brings a corrected translation of a message, your own translation of that message still takes precedence. Without a key, the tab shows the warning "⚠ OpenAI API key is not set."

**Example:** after a software update, the administrator of a company with employees in Germany sees in the statistics that the German translation is missing 40 messages and clicks Translate (40) for Deutsch only.

**Watch out:** Auto-translate overwrites all the other languages of that field; if you have corrected, say, the German translation by hand, another click replaces it with a new machine translation. The key is saved every time the Lead Capture tab is saved: if you empty the field and save the tab, the key is deleted, and Auto-translate, interface translation, the AI assistant and the scanner stop working. Interface translation takes effect only if the server allows writing to the site's translations folder or to the uploads folder; if the labels stay the same after a successful translation, ask your hosting provider to enable write access.

REAL-WORLD EXAMPLE

An IT company whose team works in Serbian has customers in Germany and Slovenia. The administrator leaves Portal language on Serbian, keeps Auto-detect on and chooses English (US) for Default landing language. The sales reps write the descriptions on their cards in Serbian and translate them with the Auto-translate button, and a colleague who speaks German reviews the German translation before it is saved. When they email their card to a partner in Munich, they add `?lang=de_DE` to the end of the address, so the card opens in German right away.

## 48. Setup wizard

**Where:** opens by itself in wp-admin after the first activation; to run it again: QR vCard Pro → Settings → General → *Re-run wizard* →

**Who:** Administrator only **Plan:** all plans

> You have just installed the software, and a wizard opens instead of the card list? This is the initial setup in seven steps; once you complete it, all pages of the software become available.

### When does the wizard appear?

The wizard switches on at the first activation on a site where the software has never been installed, and again after deletion with Permanent deletion, because the installation is then new once more. Reactivating an existing installation does not start it. Until you complete it, every visit to a page of the software in wp-admin (the card list,

card editing, any item in the software's menu) leads into the wizard; the rest of the WordPress admin works normally. There is no button for skipping the whole wizard: it ends only at the last step.

At the top are the software name and version, the label “Step 1 of 7”, a progress bar and the names of the steps: Welcome, License, Branding, Privacy, Language, EULA and Ready. The Branding, Privacy and Language steps keep the values you entered even when you click ← *Back*, and everything you set here can be changed later in Settings.

**Step 1: Welcome**

A welcome screen with four tiles that preview the steps (License key, Your branding, Privacy, 13 languages) and a *Let's go* → button. Nothing is saved at this step.

**Step 2: License**

The buttons are ← *Back*, *Skip (stay in demo mode)* and *Activate and continue* →. If the license is already active, “License already active” appears above the field, the field is locked and the button reads *Next* →. The “🎯 What happens after activation” box briefly previews what the license brings.

**License key** format QRVP-XXXX-XXXX-XXXX-XXXX

A 24-character license key with hyphens. If the key has a valid format, the wizard tries to activate it, even when you click *Skip* or ← *Back*. The result is not shown at this step: the wizard moves on to Branding even when activation fails, and you see whether the license is active at the Ready step. If you do not have a key yet, leave the field empty and click *Skip*; you can activate the license later as described in Plans, license and updates.

**Example:** the owner of a medical practice pastes the key from the purchase email, clicks Activate and continue and, at the last step, checks that the license is shown as active.

**Step 3: Branding**

The same fields as on the Branding tab, except Footer credit; the buttons are ← *Back* and *Save and continue* →. The details are in the chapter Branding.

**Portal name** Default: QR Portal · up to 60 characters

The name in the portal bar and on the sign-in form.

**Example:** “Smile Dental: team cards”.

**Logo (optional)**

A square image from the WordPress Media Library, at least 200 × 200 pixels; it is used in the portal bar, in QR codes (Single Site and higher) and in the Google Wallet pass.

**Example:** a restaurant chooses its square PNG logo, so the staff see it in the portal bar right away.

**Accent color** Default: #c2410c

The color of the buttons and accents on the portal and the background of the Google Wallet pass.

**Example:** an IT company enters the blue from its brand guidelines.

**Step 4: Privacy**

The switches and the retention period from the Privacy and GDPR tab, with a note that the default values are conservative and best left as they are unless you have a specific reason. Show notice and Privacy policy URL stay as they were, and the other three legal links do not change. The details are in the chapter Privacy and GDPR.

**Log QR code scans** Default: on

The same as Master toggle: without it there are no scan statistics.

**Example:** a real estate agency keeps it on, because it wants to see how many times each agent's card has been opened.

**Anonymize IP addresses** Default: on

Shortens the IP address before processing (192.168.1.45 becomes 192.168.1.0).

**Example:** a medical practice keeps it on so that there are no full patient IP addresses in the database.

**Hash IP for unique visitors** Default: on

A one-way hash of the IP address, needed for counting unique visitors.

**Example:** an exhibitor at a trade fair keeps it on to tell new visitors apart from repeated opens.

**Parse User-Agent (device, OS, browser)** Default: on

Extracts the device type, operating system and browser locally; nothing is sent to a third party.

**Example:** a company keeps it on to see how many visitors come from phones.

**Geo-location (via ip-api.com)** Default: off

Sends IP addresses to an external service to determine the country and city; if you turn it on, extend your privacy policy.

**Example:** an exporter turns it on only once its legal department approves the addition to the privacy policy.

**Auto-delete scans older than (days)** Default: 365 · from 0 to 3650

The same as Scan retention; 0 means keeping scans forever.

**Example:** a company enters 180, in line with its own data retention rules.

**Step 5: Language**

The same three settings as on the Language tab; the details are in the chapter Portal language, card language and automatic translation.

**Portal language (admin + clients)** Default: Use WP site language

The language of the software's pages in wp-admin and of the portal.

**Example:** a company headquartered in Ljubljana chooses Slovenščina.

**Auto-detect landing page language** Default: on

The labels on the card follow the language of the visitor's browser.

**Example:** an export company keeps it on because it has buyers from many countries.

**Default landing language (fallback)** Default: Use WP site language

The language of the labels on the card when detection fails or is turned off.

**Example:** a company that works with foreign partners chooses English (US).

**Step 6: EULA**

The text of the license agreement is in a scrollable box. The *I accept and continue* → button works only when the checkbox is ticked; without it, "⚠ EULA must be accepted" appears. The ← *Back* button works without ticking the box. What is recorded on acceptance is described in the chapter Privacy and GDPR.

**I have read and accept the terms of this End User License Agreement (EULA).** required

Confirmation that you have read and accepted the agreement; without it the wizard does not continue.

**Example:** an agency leaves this step to the client's administrator, so that the agreement is accepted by the person who will actually use the software.

**Step 7: Ready**

The "All set!" screen shows the *Client portal* link, the state of the license (*License status*: "Active:" with the plan label, or a description of demo mode), the *EULA accepted* confirmation with the version and date, and three suggestions under the heading "What's next?". The *Finish and open dashboard* → button completes the wizard and opens the All cards list.

**Note:** the "What's next?" suggestions use older menu names. "QR Cards → Add New" is QR vCard Pro → Add New, "QR Cards → Settings" is QR vCard Pro → Settings, and "Users → Add New" is WordPress Users → Add User. How portal users are added is described in Roles and permissions and Employees.

**Note:** the Welcome, License and Ready steps describe demo mode only briefly. The full rules (at most three published cards, locked plan features, the footer credit on cards) are in the chapter Plans, license and updates.

**How do you run the wizard again?**

1. In wp-admin, open QR vCard Pro → Settings → General. This option does not exist on the portal.
2. In the *Re-run wizard* panel, click *Re-run wizard* →.
3. Go through the steps; the fields already contain your current settings, so you change only what needs changing.
4. At the Ready step, click *Finish and open dashboard* →. Until you do, the software's pages keep sending you back to the wizard.

**Watch out:** the Branding step always turns Footer credit on, so on the Agency plan turn the credit off again in Branding after the wizard, if you do not want it. Accepting the agreement again replaces the earlier acceptance record. The wizard shows the original software name even when White-label is active, so keep that in mind when you go through it with an agency's clients.

REAL-WORLD EXAMPLE

The owner of a small accounting firm installs the software and gets the wizard instead of the card list. He has not bought a license yet, so he skips the License step, enters the firm's portal name and logo, leaves privacy at the default values and keeps the default language settings. After accepting the agreement, he reaches the card list within five minutes. When he buys a license a week later, he activates it on the License tab, without going through the wizard again.

## 49. Admin menu and Home

**Where:** wp-admin, left menu QR vCard Pro; first item *Home*

**Who:** Administrator; the Card Manager and employees work on the portal and are sent back to the portal from wp-admin

**Plan:** all plans; pages of features from a higher plan open with an upgrade offer

> Not sure where to find things in the admin? The software's menu has 21 items, always in the same order, and Home is an overview of the whole account with shortcuts to every section.

The main menu item carries the software's name and opens Home. Items are not hidden by plan: a feature your plan does not include stays in the menu, and its page opens with an explanation and an upgrade offer. On the WordPress Plugins screen, next to the plugin, there is also a “Cards” shortcut. The setup wizard is not in the menu; it opens by itself or from the General tab.

**Menu items, in order**

| Item | What you find there | Plan | Chapter |
|---|---|---|---|
| **Home** | an overview of the account, figures and shortcuts to all sections | all | described below |
| **All cards** | the list of all cards with statuses and actions | all | Card list, statuses, deletion and limits |
| **Add New** | the “New QR Card” screen for creating a card | all, within the plan's card limit | Creating and editing a card |
| **Analytics** | scans, clicks and trends | all; the advanced part 5 Sites and higher | Analytics: what is measured and where to see it |
| **ROI dashboard** | the path from scans to contacts, opportunities and estimated value | all | ROI dashboard |
| **Contacts** | received contacts (page title “Received contacts”), search and export | 5 Sites and higher | Contacts: overview, tags, notes and export |
| **Employees** | adding employees and sending sign-in links | Unlimited and higher; importing employees from CSV Agency only | Employees |
| **Team** | inviting additional account members and Card Managers | Agency only | Team and the Card Manager role |
| **Email signatures** | a uniform email signature for the whole team | Agency only | Team email signatures |
| **Team analytics** | combined results and the team ranking | Unlimited and higher | Team analytics and team contacts |
| **Events** | results per trade fair or campaign | Unlimited and higher | Events |
| **Bulk Import** | bulk import of cards from CSV | Agency only | Bulk Import of cards from CSV |
| **Complete guide** | this guide | all | |
| **Webhooks** | real-time notifications sent to your address | Unlimited and higher | Webhooks |
| **API keys** | access to the REST API for integrations | 5 Sites and higher | REST API and API keys |
| **ODOO ERP support** | sending contacts to Odoo | all | Odoo ERP |
| **Google Wallet** | a button for saving the card to Google Wallet | all | Google Wallet |
| **NFC cards** | writing a card to an NFC sticker or card | all | NFC cards |
| **AI assistant** | a description, a headline and messages with the help of AI | all | AI assistant |

| Item | What you find there | Plan | Chapter |
|---|---|---|---|
| **Marketing** | the View, Campaigns, Pixels, Reviews, Follow-up, Pages, SEO, Connection and Help tabs | all | Marketing module and Google reports and the other chapters of the marketing part |
| **Settings** | all settings tabs | all; White-label Agency only | Settings: structure and the General tab |

**What does Home show?**

- **Header:** the software name, the greeting “Hi, [your name]. Everything in one place.” and the *QR Portal access* button, which opens the portal in a new browser tab. On the right are the shortcuts *Complete guide*, *Settings*, *Language selection* (the Language tab) and *License and updates* (the License tab), the “Package: …” label and the version number.
- **Three figures for the whole site and all users:** published cards (*cards*), card opens saved in the statistics (*scans*) and received contacts (*contacts*). Clicking a figure opens All cards, Analytics or Contacts, respectively.
- **Tiles in four groups:** “Cards and contacts” (All cards, New QR Card, Contacts, Analytics, ROI dashboard, Lead Capture), “Team” (Employees, Team analytics, Email signatures, Team (co-managers)), “Events and import” (Events, Bulk Import) and “Integrations” (ODOO ERP support, Google Wallet, NFC cards, AI assistant, Marketing, Webhooks, API keys). The tile of a feature your plan does not include carries a 🔒 padlock with the description “Requires a higher package”, but it still opens.
- **The “Software guide: what it offers and who can do what” block:** a short description of the software, a list of its features and benefits, the explanation “Two places to work: the Admin panel and the QR portal” and the table “Roles and permissions: who can do what”.

**Note:** the scan count on Home counts only card opens, not clicks. While scan logging is turned off on the Privacy and GDPR tab, this number does not change.

**Watch out:** the Lead Capture tile has no padlock because it leads to a settings tab, but contact exchange on the card itself works only on 5 Sites and higher. The roles table on Home is a shortened overview that leaves out the Card Manager role; the exact description of all roles is in the chapter Roles and permissions.

REAL-WORLD EXAMPLE

The sales director of an IT company opens Home every Monday and within a minute sees how many cards are published, how many times they have been opened and how many contacts have come in. When the number of contacts rises after a trade fair, she clicks it and goes straight to Contacts. The Events tile with its padlock shows her that she would get results per trade fair only on the Unlimited plan, so she decides on the upgrade with concrete figures in front of her.

## 50. Deactivation, deletion and data retention

**Where:** WordPress Plugins (*Deactivate*, *Delete*); QR vCard Pro → Settings → General (Permanent deletion)

**Who:** Administrator only **Plan:** all plans

> Do you need to switch the software off for a while or remove it from the site? Deactivation and default deletion keep all data; data is deleted irreversibly only if you turned on Permanent deletion before deleting the plugin.

### Deactivation (WordPress Plugins → Deactivate)

The software's code stops running, and all data stays in the database. While the software is deactivated, public cards and the portal are not available, and printed QR codes and NFC cards lead to pages that do not exist. On deactivation the software deletes no data: it removes the scheduled geo-location job, refreshes the site's URL rewrite rules and forgets the stored update offer. When you activate it again, everything works as before, and the setup wizard does not appear.

### Deletion (WordPress Plugins → Delete, after deactivation)

WordPress removes the software's files. What happens to the data depends on the Permanent deletion switch on the General tab: if it is off, which is the default, the data stays and comes back when you install the software again; if it is on, the data listed in the table below is deleted.

**What is deleted and what stays?**

| Data | Deletion without Permanent deletion | Deletion with Permanent deletion |
|---|---|---|
| **the software's scheduled jobs (geo-location, retention, license check, follow-up messages, webhook deliveries, cleanup of sign-in links)** | deleted | deleted |
| **cards and /l/ pages, with all their data** | stay | permanently deleted |
| **statistics (scans), contacts, events, API keys, webhooks with their delivery logs, sign-in and sharing links** | stay | deleted |
| **the QR Manager and Card Manager roles** | stay | removed; user accounts stay, but without those roles |
| **the software's capabilities on the Administrator role** | stay | removed |
| **the portal page** | stays | deleted |
| **all settings, the license key, the OpenAI key, the Lead Capture settings, the license agreement acceptance record** | stay | deleted |

Even Permanent deletion does not remove: users' WordPress accounts and the data in their profiles, images in the WordPress Media Library (photos, logos, galleries), and your own translation files created by the interface translation tool, in the `wp-content/languages/plugins/` and `wp-content/uploads/qrvp-i18n/` folders. In a WordPress network (Multisite) the switch is checked for each site separately: data is deleted only on the sites where Permanent deletion is on.

### How do you remove the software together with its data?

1. Make a backup of the database, in case you need the data after all.
2. If you want to use the license on another site, first deactivate it on the License tab (Plans, license and updates). Deleting the software does not notify the license server.
3. Export the contacts and statistics you want to keep (Contacts: overview, tags, notes and export, Analytics: what is measured and where to see it).
4. In QR vCard Pro → Settings → General, turn on Permanent deletion and click *Save changes*.
5. In WordPress Plugins, deactivate the software, then click *Delete*.
6. If needed, delete the employees' accounts manually in WordPress Users and the images in Media.

### Which jobs run on their own in the background?

| Job | How often | What it does |
|---|---|---|
| **geo-location** | once an hour | sends up to 100 new IP addresses to the ip-api.com service and stores the country and city; only while Geo-location is on |
| **scan retention** | once a day | deletes scans older than the number of days in the Scan retention field; 0 means it deletes nothing |
| **license check** | once a day | checks the license on the license server, only when a key is entered |

The jobs for follow-up messages, webhook deliveries and sign-in links are described in the chapters Automatic follow-up, Webhooks and Login, password and first sign-in. WordPress runs scheduled jobs when someone visits the site, so on a site with few visits a job may run late.

Retention deletes only scans. Contacts, webhook delivery logs, events and other data stay until you delete them yourself; if your data retention rules also cover contacts, delete them manually in Contacts.

> **Watch out:** Permanent deletion cannot be undone. If the switch is on and you delete the software only to reinstall it right away, for example because of a damaged file, you will lose all your cards. Before a reinstall like that, turn the switch off and save the tab. Deactivation, on the other hand, should be planned for the time when traffic is lowest, because while it lasts, QR codes lead nowhere.

> REAL-WORLD EXAMPLE
>
> An IT company tested the software for three months on a test domain and is now rolling it out on its main site. On the test site, the administrator deactivates the license, exports the contacts collected at a trade fair, turns on Permanent deletion and deletes the plugin. On the main site, the administrator installs the software from scratch, goes through the setup wizard and activates the license. The test database stays clean, and there are no test cards on the main site.

## 51. License status, conflicts and diagnostics

**Where:** the top of every page of the software in wp-admin; the address `/wp-json/qrvp/v1/health`

**Who:** Administrator only **Plan:** all plans

> Is something not working as it should, or are you not sure whether the license is active? At the top of every page of the software there is a license notice, and the software itself recognizes known conflicts with other plugins and tells you what to set.

License activation and checks are described in the chapter Plans, license and updates. This chapter covers the notices that the software shows on its own and the tools for checking the installation.

**What does the License status notice show?**

At the top of every page of the software in wp-admin (the card list and card editing, Home, Settings and the other menu items), the administrator sees the "License status" notice. It cannot be dismissed. Next to the heading is a status badge, and below it are four fields:

| Field | What it shows |
|---|---|
| **Package** | Demo, Personal, Single Site, 5 Sites, Unlimited or Agency; "(not determined)" if the plan is not known |
| **Demo mode** | Yes or No |
| **Max. cards** | how many published cards the plan allows, or "Unlimited"; 3 in demo mode and 2 on the Personal plan |
| **Cards** | "X published · Y in draft", where the second number counts the draft cards |

- **Active:** the license is active.
- **Grace period:** the license is in a transition period set by the license server; features work as they do with an active license.
- **Unknown:** the license server is not responding at the moment; the software works according to the last successful check, for at most 7 days from the first failed check.
- **Demo:** there is no active license. A license that has expired or is invalid also gets this badge; the exact reason is shown in the *Status* field on the License tab.

**What do the warnings in the notice mean?**

When there are cards in draft status, the notice turns yellow and says how many there are. The *View draft cards* button opens the list showing only drafts, and the "Publish all N drafts → publish" button, after you confirm, publishes all drafts at once and reports "✓ N cards are published."

Drafts can appear when a card is created after the plan's limit has been reached, but the list also includes drafts that users deliberately saved as unfinished.

The second warning, "⚠ The license is technically active, but tier detection returns an empty string…", appears when the license server sends a plan that the software does not recognize; cards can still be created in that case. Click *Re-check* on the License tab, and if the message remains, contact support and send them the text of the notice.

> **Watch out:** the button for publishing drafts publishes the drafts of all users at once, with no selection. Before clicking it, review the drafts, delete the ones you do not need and check in the *Max. cards* field that your plan allows that many published cards.

**How does the software detect conflicts with other plugins?**

Once every six hours, and immediately after any plugin is activated or deactivated, the software checks whether any of the plugins known to interfere with cards is active on the site. For each one it finds, the administrator sees on the software's pages the notice “Possible conflict detected with: [plugin name]”, a short description of the problem, a “🔧 How to fix:” box with the exact setting, for some plugins a “View official documentation ↗” link, and a “Got it, hide this notice” link.

| Plugin | Possible problem | What to set |
|---|---|---|
| **WP Rocket** | caches cards: a visitor may get a stored copy, and the scan is not recorded | Settings → Advanced Rules → “Never cache the following URLs”: add `/q/(.*)` |
| **W3 Total Cache** | caches cards and can block the REST API | Performance → Page Cache → “Never cache the following pages”: `/q/*` on a new line, then Empty all caches |
| **LiteSpeed Cache (informational)** | the exclusions are worth checking | Cache → Excludes → “Do Not Cache URIs”: `/q/`, then Purge All |
| **WP Super Cache** | caches cards | Settings → WP Super Cache → Advanced → Rejected URL Strings: `/q/` |
| **WP Fastest Cache** | caches cards | Exclude → Pages → Add New Rule → “Starts With”: `/q/` |
| **Wordfence Security** | can block scan logging and contact exchange | Firewall → All Firewall Options → Rate Limiting → “Whitelisted URLs”: `/wp-json/qrvp/v1/*` |
| **Solid Security (iThemes)** | can block the REST API | Settings → System Tweaks → REST API: “Default Access” |
| **Sucuri Security (informational)** | the firewall can block submissions of the contact exchange form | Sucuri Firewall Dashboard → Whitelist URL: `/wp-json/qrvp/v1/exchange-contact` |
| **WPML** | can add a language prefix to card addresses (for example `/en/q/...`) | WPML → Settings → Custom Posts: for the card content type (shown in the notice as “QR vCard”), turn off “Make translatable” |
| **Polylang** | can change card addresses | Polylang → Settings → Custom Post Types: turn off the card content type |
| **Elementor (informational)** | it is compatible, but should not be used to edit cards | do not open `/q/` pages in Elementor; cards have their own design |

If you use caching that is not on the list, for example caching on the hosting side or a CDN, apply the same rule: addresses that start with `/q/` should not be cached, and security plugins should not block addresses that start with `/wp-json/qrvp/v1/`.

> **Note:** the check only looks at whether a plugin is active, not at how it is configured, so the notice stays even after you have done what it says. In that case click “Got it, hide this notice”: the notice disappears for all administrators of the site until the next version of the software, and after an update it appears again if the plugin is still active.

**What does the http:// address warning mean?**

If the site address does not start with https://, the software's pages show a warning that cannot be dismissed: “The site address starts with http://. QR codes and NFC cards then lead to an insecure address, so phones show a warning that the connection is not secure. In the WordPress settings (Settings > General), set both site addresses to https:// before printing QR codes and writing NFC cards.” Before making that change, check that an SSL certificate is installed on your hosting; without one, the site will not work at an https:// address. The warning disappears as soon as both addresses start with https://.

**What if the database update fails?**

After an update, the software sometimes needs to adjust tables in the database. If that fails, all administrators see this on every admin page: “The database update (from vX to vY) did not complete successfully. The plug-in is running with the old schema, but some new features may not be available.” Below it is the error text, after the word “Error:”, and a *Try again* button. The cause is usually on the server side, for example a full disk or insufficient privileges for the database user. Click *Try again*; if the error happens again, send the text that follows the word “Error:” to your hosting provider or to support.

**How do you quickly check the state of the installation?**

The address `https://your-site.com/wp-json/qrvp/v1/health` opens in a browser without signing in and returns a technical report: the overall state (`ok` or `degraded`), the software version, the database version and the version the software expects, whether the scans and contacts tables exist, the plan as a number from 0 (demo) to 5 (Agency), the REST API address, the number of published cards, the PHP and WordPress versions, whether the WordPress version is supported (5.8 and newer), the number and list of detected conflicts and the time of the check. The `degraded` state means that the database has not been updated to the expected version, that one of the tables is missing or that WordPress is older than 5.8. The report contains neither the license key nor any data about visitors or contacts, but it does show the software versions. It is useful for support and for site monitoring services; if the address does not open, check that a security plugin is not blocking the REST API.

> **REAL-WORLD EXAMPLE**
>
> The owner of a downtown restaurant notices that analytics shows far fewer scans than the number of guests who scan the QR code of the restaurant's card on the tables. At the top of a software page he sees the notice about a possible conflict with WP Rocket, so in the WP Rocket settings he adds `/q/(.*)` to the URLs that are never cached and clears the cache. From then on, every scan goes into the statistics, and he hides the notice by clicking “Got it, hide this notice”.

# 52. Troubleshooting

> Something is not working the way you expect? Here are the most common questions from practice, grouped by area, each with an answer and a pointer to the chapter with the details.

### Card and QR code

**Do I have to reprint the QR code when I change my phone number or position?**

No. The QR code contains only the card's short URL, not the data, so every change applies immediately to codes that are already printed as well. You need to reprint only if you change the domain or the site address in the WordPress settings, or if you permanently delete the card.

**Why is the Map button not shown on the card?**

The *Map* button appears only when the address includes a street or a city; the country alone is not enough. Enter at least the city in the *2. Contact details* box (on the portal, *2. Contact*) and save the card.

**Why does the saved contact have no photo?**

Only a profile photo whose original file is a JPG or PNG of up to 100 KB goes into the contact. A larger image, or an image in WebP or GIF format, is shown on the card but not in the phone's contacts. Reduce the photo to below 100 KB, save it as a JPG and select it again on the card.

**How do I get a QR code with the company logo?**

The logo in the QR code works from the Single Site plan: upload the logo in Settings → Branding and it appears automatically in the QR codes of all cards. From the 5 Sites plan, each card can also have its own logo, set in the *Branded QR* box in wp-admin. You download the code with the logo in the *QR Code* box, at 240×240 pixels, which is enough for screens and email; the print code from the portal, up to 2000×2000 pixels, is always without the logo.

**Does Share details protect the data I do not want to share?**

No. The field selection limits only what that one link shows, and the card stays public. Anyone who removes the part starting with `?share=` from the link, or opens the link after 30 days, sees the whole card. Put on the card only data you are comfortable showing to anyone.

**Why are the buttons on the card in English while the text is in Serbian?**

The button labels follow the language of the visitor's phone, while the card text follows the language tabs you have filled in. If only the Srpski (Serbian) tab is filled in, a visitor with an English phone sees Serbian text and English buttons. Fill in the English (US) tab, manually or with the ✨ *Auto-translate* button, or in Settings → Language turn off *Auto-detect language* and select Serbian for *Default landing language*.

**Why does the Accent color from Branding not change the color of my card?**

The accent color applies only to the portal, the portal sign-in page and the background of the Google Wallet pass. The public card has its own colors, which are set on each card; see Appearance: templates, free layout and colors.

**Can I remove the “Powered by” label from the cards?**

Only on the Agency plan: turn off Footer credit in QR vCard Pro → Settings → Branding. On the other plans, the label stays even when the switch is off. Details are in the Branding chapter.

**The QR code does not scan, or scans only with difficulty. What should I check?**

Check the size and the contrast: on a business card, the code should not be smaller than 2 cm, a dark code on a light background works best, and a white margin should remain around the code. Download the code in a higher resolution for

printing and, before you send it to the print shop, scan it with two different phones. Details are in QR code: download, logo and printing.

**Changes to the card are not visible right away. Why?**

The most common cause is caching: a caching plugin on the site, caching at the hosting provider or a CDN. Open the card in a private browser window or force a page reload (Ctrl+Shift+R on a PC, Cmd+Shift+R on a Mac), and if necessary clear the cache in the caching plugin. If it keeps happening, set up exclusions as described in the License status, conflicts and diagnostics chapter.

## License, plans and menu

**What happens to the cards when the license expires?**

The site switches to demo mode. Existing cards and their QR codes keep working and can still be edited. A new card can be published only while the site has fewer than three published cards, the features of paid plans are locked and there are no updates. After you renew the license, click *Re-check* on the License tab in Settings.

**Which plan do I need for marketing and integrations?**

The Marketing module with Google reports, campaigns, pixels, reviews, general follow-up, /l/ pages, SEO and Odoo work on all plans. Follow-up on the card and the REST API require 5 Sites or higher, webhooks require Unlimited or higher, and Bulk Import of cards is Agency only.

**I do not see a certain item in the menu. Why?**

The items depend on the role and the plan. Employees and Team members do not see the tools for managing the company, and features of higher plans are hidden or open with an upgrade offer. An overview of all screens and who sees them is in QR portal: screens and who sees what, and the plans are described in Plans, license and updates.

## Employees, team and sign-in

**An employee says the sign-in link does not work. What should I do?**

Ask which message they see. “This link has already been used…” means the link has already been opened: they should sign in with their password or click *Forgot password?*. If the link has expired or was revoked, click 🔄 on the Employees page: the employee gets a new email, and you get a new link and a text for a message. All the messages are explained in the Login, password and first sign-in chapter.

**I forgot my portal password. How do I get in?**

On the portal sign-in page, click *Forgot password?* and enter your email address; you will receive a link for setting a new password. An employee can also ask the administrator or the Card Manager for a new sign-in link. The whole procedure is in Login, password and first sign-in.

**What is the difference between an employee and a team member?**

On the portal, there is none: both work only with their own cards. You add an employee yourself, with a ready-made card and a one-time link (from the Unlimited plan), and you manage them on the employee list. You invite a team member through Team (Agency only): they set their own password and create their own cards. Details are in the Employees and Team and the Card Manager role chapters.

**Does deactivating an employee take their card off the internet?**

No. Deactivation only removes access to the portal; the card stays public, and QR codes and NFC stickers still open it. If the card should not be public, delete it from the card list, or delete the employee permanently with the 🗑 button, which deletes the account, all of their cards, scans and contacts.

**An employee cannot create a new card. Why?**

Most often, the number set in *Maximum cards per person* has been reached; the portal then reports “You have reached the allowed number of cards”. That limit also counts drafts, which are not visible on the portal, so the Administrator should check in wp-admin whether the employee has any drafts. Another possible reason is the plan limit: Personal allows two cards on the whole site.

**Can an employee create more than one card?**

Yes, and so can a team member, unless you set *Maximum cards per person* at the bottom of the Employees or Team page. The default value 0 means no limit, and the card the software created when the employee was added also counts.

**How does the Card Manager see contacts from all cards?**

On the portal, they should open *Contacts* in the quick actions bar, with no card selected: the Administrator and the Card Manager see contacts from all of the company's cards there and can export them to CSV. If they have no card of their own, and therefore no bar, they can open the same screen by adding `?qrvp_view=contacts` to the end of the portal URL. The contacts of a single card are opened with the *Contacts* button on that card.

## Contacts, Lead Capture and analytics

**Why does the contact exchange window not appear on my card?**

Contact exchange works from the 5 Sites plan. Check the strategy as well: on the QR vCard Pro → Settings → Lead Capture tab, *Off* must not be selected, and it must not be selected on the card itself either (on the portal, *Edit → 5. Lead Capture (per card)*). Check the card in a private browser window; if you have already submitted the form in the same window, reload the page.

**Can the form ask only for a name and a phone number, without an email?**

No. Email is always required: the server rejects a contact without a valid email address, and the builder does not allow you to delete the *Email* field. You can make the phone number stand out by unchecking *Phone* in the *Optional fields* option, so that the number field is always visible.

**Why does an employee not see the contacts I see?**

Employees and Team members see only contacts from their own cards. The Administrator and the Card Manager see contacts from all cards on the portal, and the Administrator also in QR vCard Pro → Contacts. The answers to the additional fields of a custom form are visible only to the Administrator, in wp-admin.

**Why is the number in the chart higher than the number of views?**

*Total scans* and *Today* count only card openings, while the daily chart, the heat map, countries, cities and devices count all recorded events: openings, clicks and contact saves. A visitor who opens the card and calls you is counted twice in the chart.

**Why does analytics not show countries and cities?**

Location lookup through the ip-api.com service is off by default (Privacy and GDPR, the *Send IP addresses to ip-api.com to determine country/city* option). Without it, a location exists only if the site runs behind Cloudflare; the country then appears as a two-letter code in the *Latest scans* block, while the *Countries* list may stay empty.

**Why does a contact from the trade fair not have the event name among its tags?**

A contact gets the event name only if, at the moment it was received, the card was assigned to the event, the event had the *Active* status and the date that day was between *From* and *To*. The label is not added afterwards, so contacts that arrived before you created the event or assigned the card to it stay without it.

**Why does the ROI dashboard show many more opportunities than we actually have?**

The default *Lead → opportunity rate (%)* is 100, so every contact, including those from the scanner and the API, counts as an opportunity. Enter a realistic percentage in *Assumptions*. Also check *Average deal value* and *Opportunity close rate (%)*, because the pipeline and the revenue depend on them.

**Why did the person whose paper business card I scanned not get a follow-up message?**

That is by design. Automatic follow-up goes only to people who left their details themselves, through the form on the card or on a /l/ page. Contacts from the business card scanner and contacts entered through the API do not get an automatic message, so get in touch with them personally. See Automatic follow-up.

**Why is the conversion rate in the campaign funnel higher than I expected?**

"Contacts" in the funnel counts all contacts from the period, including those from the business card scanner, from the API and from /l/ pages, while openings of /l/ pages are not counted as scans. So compare the channels with each other, in the "By campaign" and "By source" tables, and not only by the overall rate. See Campaigns and conversion funnel.

### Personal tools

**The scanner says the OpenAI key is not set. What should I do?**

The Administrator enters the key in QR vCard Pro → Settings → Lead Capture, in the *OpenAI API Key* field (the same field also exists on the portal, under *Settings*). For the Administrator, the *Open settings* button in the scanner leads exactly there. The Card Manager, employees and team members have no access to the settings and, instead of the button, see a message saying that the key is set by the site administrator.

**Can "Powered by QR vCard Pro" be removed from the email signature?**

No. The line "★ Powered by QR vCard Pro" and the label "Scan to save" are part of every signature, regardless of the plan and of White-label. With the team signature policy, you change the color, the logo display, the CTA line and the disclaimer, but not those elements.

**Does the software support Apple Wallet?**

No. The software creates only Google Wallet passes. iPhone owners save your card with the *Save contact* button on the public card.

**Who pays for using the AI assistant?**

Every request goes through the OpenAI key entered by the Administrator, so OpenAI bills the owner of that key, even when an employee uses the tool. If you do not want the whole team to use the assistant, turn off the *Show the AI assistant to all portal users (managers and employees)* option; the tools then do not work for anyone.

### Marketing and integrations

**I created a webhook, but nothing arrives at my URL. What should I check?**

Check, in this order: whether the plan is Unlimited or higher, whether the webhook is active (on the portal, in the Edit area), whether the right events are selected, whether the URL starts with https:// and whether the test button reports success. In wp-admin, in the "Recent events (last 20)" table, you can see every attempt with its HTTP code and error message; a failed delivery is retried after 1, 5 and 15 minutes. On a site with few visits, deliveries can be late, because they are triggered by the WordPress task scheduler. Details are in the Webhooks chapter.

**Excel saved the CSV, and the import reports "first_name is empty" in every row. Why?**

Most often, the file was saved with semicolons instead of commas, so the software sees the whole row as one unknown column. Open the file in Notepad and look at the first row; if the column names are separated by semicolons, import the file into Google Sheets and save it as a CSV, as described in the Bulk Import of cards from CSV chapter.

**I lost the API key or the webhook secret. Can I see it again?**

No. Both are shown only once. For an API key, create a new one and revoke the old one; for a webhook, click 🔄 Secret in wp-admin or 🔄 on the portal and enter the new secret in the receiving application. See REST API and API keys.

**I turned on search visibility for the cards, but my card is still not on Google. Is something wrong?**

Enabled indexing is a permission, not a guarantee: whether and when the card appears is up to the search engine, and that usually takes time. In the "SEO and visibility" box, check that the card is not hidden, fill in the position, the company, a short

description and a photo, and submit the /qrvp-sitemap.xml address in Google Search Console. See SEO and search visibility.

**Where can I see the private feedback from the review page?**
Only in the site administrator's email, at the address from the WordPress Settings → General screen. The software does not store it in the database and does not send it to the card owner; if someone else needs to see it, set up forwarding in that mailbox. See Google reviews.

**Settings and data**

**I changed the portal address and the old link no longer works. What now?**
The software does not redirect the old address to the new one. You can see the valid address in the Current link row on the General tab; send that one to your users. If you need the old address, restore the old slug and save the tab.

**What happens to cards and contacts when I delete the plugin?**
By default, nothing: the data stays in the database and comes back when you reinstall the plugin. Everything is deleted only if Permanent deletion on the General tab was turned on before the deletion; see Deactivation, deletion and data retention.

**Does the software send visitor data to other companies?**
With the default settings, it does not. Data leaves the site only when you turn on features that need it: Geo-location (ip-api.com), tools that use OpenAI, Google Wallet, the Marketing module, pixels after the visitor's consent, Odoo or webhooks. An overview is in the Privacy and GDPR chapter.

**Why does a visitor from Italy see the labels on the card in Serbian?**
Italian and Macedonian are offered in the settings, but no translation is shipped for them, so the labels are shown in Serbian, the software's source language. If you have many such visitors, turn off Auto-detect language and select English for Default landing language; see Portal language, card language and automatic translation.

**How do I run the setup wizard again?**
In wp-admin, open QR vCard Pro → Settings → General and click Re-run wizard →. The fields already contain your current settings. On the Agency plan, check Footer credit after the wizard, because the Branding step turns it back on.

**I set up the caching plugin as the notice says, but the conflict notice is still there. Why?**
The check looks only at whether the plugin is active, not at how it is configured. When you have done what the “How to fix:” box says, click “Got it, hide this notice”; the notice comes back only after the next software update, and only if the plugin is still active.

## 53. Glossary

> Came across a term you are not sure about? Here are the terms used in the software and in this guide, in alphabetical order.

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| **Accent color** | The color of the buttons and accents on the portal, and the background of the Google Wallet pass. It does not change the colors of the public card. |
| **API key** | A password for applications, in the form qrvp_live_..., with which another application accesses the REST API with the permissions of the user who created the key. |
| **Auto-tagging** | Automatically linking views, clicks and contacts to an event, and adding the event name to the contact's tags, while the event is active and the card is assigned to it. |

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| **Branded QR** | A QR code with the company logo in the middle. It works from the Single Site plan, and a separate logo for each card from the 5 Sites plan. |
| **Card** | A mobile page for one person, with their details, buttons for calling and email, and the Save contact button. It opens through a short URL or a QR code, with no app and no sign-in. |
| **Card Manager** | A role that only the Administrator assigns: it sees and changes all of the company's cards and manages employees and the team, but works only on the portal and does not change settings. |
| **Card template** | A ready-made layout and style of the card. Minimal is available on all plans, and the other six templates from the Single Site plan. |
| **Cohort** | A group of visitors who, within the six weeks observed, first opened the card in the same week. It is used to track how many visitors come back. |
| **Consent banner** | A notice on the public card with the “Accept” and “Decline” buttons. Until the visitor accepts, measurement and advertising code is not loaded. |
| **Contact (lead)** | Details that a card visitor left you, or that you entered with the scanner or through the API. All contacts can be seen in the Contacts section. |
| **Contact saved** | An analytics event that occurs when a visitor downloads the vCard without an exchange, taps Skip in the exchange window or successfully submits the form. |
| **Contact source** | A label that tells how the contact was created (Post-Save, Banner, Gated, Form, Scan, Import). Contacts are filtered by it. |
| **Conversion funnel** | An overview on the Campaigns tab that shows how many card openings turn into interactions and contacts, broken down by campaign, source and card. |
| **Conversion rate** | The share of visitors who took the desired step, in percent. In card analytics, it is the number of Contact saved events divided by the number of views; in the campaign funnel, it is the number of contacts divided by the number of scans in the same period. |
| **Custom form** | A contact exchange form put together in the visual builder, with additional fields, for all cards or for one card. Available from the Unlimited plan. |
| **Deactivation** | Removing access to the portal without deleting the account or the cards. The card stays public, and the person comes back by being added or invited again. |
| **Demo mode** | The state without an active license. Existing cards work, at most three cards can be published, plan features are locked and there are no updates. |
| **Dynamic QR code** | A QR code that contains only the card's short URL, not the data. That is why changes to the card also apply to a code that is already printed. |

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| **Employee** | A person for whom the Administrator or the Card Manager creates an account and a ready-made card on the Employees page. They sign in the first time with a one-time link, and after that with their email and password. |
| **EULA** | The end user license agreement, which is accepted in the setup wizard. The software records who accepted it, when and from which IP address. |
| **Exchange strategy** | The way the contact exchange window is offered to the visitor: Off, Post-Save modal, Pre-Save CTA banner, Gated or a combination of banner and modal. It is chosen globally or for a single card. |
| **First sign-in link** | A one-time link (called “magic link” in the interface) with which an employee enters the portal for the first time. It is valid for 30 days, works only once and immediately asks for a password to be set. |
| **Follow-up** | An automatic thank-you message sent to a person who left you their contact themselves. |
| **Footer credit** | The label about the software in the footer of the public card. Only the Agency plan can hide it. |
| **Free layout** | A template in which you set the order, visibility and colors of the card's elements yourself, in the builder on the portal. |
| **Gated** | A strategy in which contact exchange is presented as the first step before the vCard is downloaded. The visitor can still skip the form. |
| **Geo-location** | Determining the visitor's country, region and city by sending the IP address to the ip-api.com service. It is off by default. |
| **Google Wallet pass** | A digital business card saved in Google Wallet on the phone, with the name, the contact details and a QR code that leads to the card. |
| **Grace period** | Seven days after the first failed license check caused by an unreachable license server, during which everything keeps working as before. |
| **HMAC signature** | A check value calculated from the request content and a secret key. With it, the receiver verifies that the request comes from your site and was not altered on the way. |
| **Honeypot** | A hidden form field that people do not see but spam bots fill in. Such a submission is silently discarded. |
| **Icon on phone display** | A shortcut to the card on the phone's home screen, which opens the card with one tap. |
| **Indexing** | Permission for search engines to show a page in search results. A card that is not indexed works normally through its link and QR code. |

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| **IP address anonymization** | Shortening the IP address before processing: for IPv4, the last number becomes 0, and for IPv6, the last 80 bits are removed. |
| **IP address hash** | A one-way record derived from the IP address, from which the address cannot be recovered. It is used to count unique visitors. |
| **Issuer ID** | The issuer account number from the Google Pay & Wallet Console, under which the company presents itself to Google as the issuer of passes. |
| **Language switcher** | A dropdown menu with the 🌐 icon on the card, in the portal bar and on the portal sign-in page. The choice applies for 30 days in that browser. |
| **Language tabs** | A row of tabs above the card's translatable fields, in which the text is entered separately for each of the 11 languages. |
| **Lead Capture** | A feature that, at the moment a card visitor saves your contact, invites them to leave their details for you as well. It works from the 5 Sites plan. |
| **Lead magnet** | A file, for example a PDF guide, that a visitor to a /l/ page receives in exchange for their name and email. |
| **License key** | A code in the form QRVP-XXXX-XXXX-XXXX-XXXX that is activated in Settings → License. Based on it, the license server determines the plan. |
| **License status** | A notice at the top of every software page in wp-admin showing the plan, demo mode, the maximum number of cards and the number of published cards and drafts. |
| **Maximum cards per person** | A shared setting of the Employees and Team pages that determines how many cards employees and team members may have. The value 0 means no limit. |
| **NFC sticker** | A sticker or plastic card with a small wireless chip that stores the card's address, so the card opens when the sticker is held against a phone. |
| **OpenAI API key** | The key of your OpenAI account, which the Administrator enters in Settings → Lead Capture. It is used by Auto-translate, interface translation, the AI assistant and the business card scanner; OpenAI bills the usage to the owner of the key. |
| **Permanent deletion** | A switch on the General tab that determines whether deleting the plugin also removes all cards, statistics, contacts and settings. |
| **Pipeline** | In the ROI dashboard, the estimated value of opportunities: the number of opportunities multiplied by the average deal value. |
| **Portal slug** | The part of the address, after the site address, at which the QR portal opens, qr-portal by default. It is changed on the General tab in Settings. |
| **Pre-Save banner** | A highlighted box above the Save contact button that opens the exchange window before the visitor saves your contact. |

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| **QR portal** | A page on your site, with its own sign-in, where all users edit cards and use the tools. The Card Manager, Employees and Team members work only on the portal. |
| **Quick actions bar** | A row of shortcuts above the card list on the portal (New card, Statistics, Email signature, Contacts, Start tutorial) for the user's own cards. |
| **Retargeting pixel** | A short piece of code from an advertising platform (Meta, Google Ads, LinkedIn) that records a visit to the card, so that the platform can later show that visitor an ad. |
| **Review gating** | The practice of offering a public review only to satisfied customers, which Google does not allow. The review page avoids it, because it offers everyone both a Google review and a private comment. |
| **Scan retention** | The number of days after which the software deletes old scans, once a day. The default is 365; 0 means keeping them forever. |
| **Service account** | A technical Google account with its own email address and private key, created in Google Cloud. The software uses it to sign Google Wallet passes and to read reports from Google Analytics and Search Console, with read-only access. |
| **Setup wizard** | A guided setup in seven steps that opens after the software is activated for the first time. You can run it again from the General tab in wp-admin. |
| **Share details** | A button on the card with which a visitor sends the card to a third person, with a choice of fields. The choice limits that link, but it is not data protection, because the card stays public. |
| **Short card URL** | A permanent address in the form your-site.com/q/ followed by six letters and digits, created when the card is saved for the first time. It does not change when you change the details on the card. |
| **Signature policy** | An Administrator setting (Agency plan) that builds the same accent color, logo display, CTA line and legal disclaimer into the email signatures of all cards. |
| **Sitemap** | A list of addresses that makes it easier for search engines to find pages. The software creates it on its own at the address /qrvp-sitemap.xml. |
| **SMTP** | A server for sending email. When you enter it in Follow-up, messages go out through your mail account instead of through the site's mail. |
| **Team member** | A person invited through the Team page (Agency plan) who sets their own password and creates their own cards. On the portal, they have the same rights as an employee. |
| **Unique visitors** | The number of different hashed IP addresses in the selected period. With address anonymization, devices from the same network count as one. |
| **User-Agent** | Text that the browser sends with every request, from which the software, on your server, extracts the device type, operating system and browser. |

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| **UTM parameters** | Three additions at the end of an address (utm_source, utm_medium, utm_campaign) by which the software recognizes which channel the visitor came from. They do not change the content of the card. |
| **vCard (.vcf)** | The standard contact format that a phone adds to its contacts. It is downloaded with the Save contact button. |
| **View** | A single opening of the card. In reports it is counted as a scan, regardless of whether the card was opened with a QR code, NFC or a link. |
| **Virtual background** | A PNG image with the card's QR code, used as a video call background (16:9) or as a vertical card for social networks and print (9:16). |
| **Webhook** | An address to which the software automatically sends data about an event, for example a new contact, as soon as it happens. |
| **White-label** | An Agency plan feature with which the software appears under your name in the WordPress admin and in the label on the cards. |