

Hopewiser AutoComplete LWC (Hopewiser: Global Address Verification)

User Guide

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Produced: Spring 2024
Version: 3.4.9

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1 Introduction

Welcome to **Hopewiser AutoComplete LWC**, a Lightning Web Component for Salesforce. The solution is also referred to as **Hopewiser: Global Address Verification**.

Hopewiser AutoComplete LWC provides a fast and accurate way to capture addresses, presenting the most relevant matches as you type. This greatly speeds up the process of entering addresses while at the same time ensuring that accurate address information is stored.

1.1 Intended Audience

This user guide is aimed at end users of Hopewiser AutoComplete LWC.

1.2 Administration

Please refer to the Administration Manual for Hopewiser AutoComplete LWC where more detailed installation, upgrade and customisation instructions are given.

1.3 Overview

Hopewiser AutoComplete LWC comprises a range of software components which access address data held on the Master Address File (MAF) licensed from Hopewiser Ltd (<http://www.hopewiser.com>).

By using Hopewiser AutoComplete LWC, you have the ability to:

- Validate addresses at point entry
- Provide full addresses from partial details
- Return corrected address where the input contains incorrect information
- Select from a list of the most suitable addresses as you type
- Search for postcodes, localities, streets and premises.

2 Hopewiser AutoComplete LWC Component

2.1 Selecting a Master Address File (MAF)

Hopewiser AutoComplete LWC allows the user to select a specific Master Address File (MAF) for the purpose of validating and capturing addresses. The image below shows that in a Salesforce Custom Lightning App, the user has added three Hopewiser AutoComplete LWC lightning Components, for example a Billing Address Search, a Shipping Address Search, and a Mailing Address Search components have been added onto the Lightning Page. The method of adding the Hopewiser AutoComplete LWC component to the Salesforce Custom Apps and the Lightning Record Pages can be referred in the later section.

Different MAFs can be selected to provide access to various addressing data, for example providing access to a United Kingdom addresses, or for example Australian addresses. The image below shows how different MAFs have been selected for different Hopewiser AutoComplete LWC components, the Billing Address using an Australian MAF for addresses, the Shipping Address using a UK MAF, and the Mailing Address using a New Zealand MAF.

The different MAFs are available on a subscription basis.

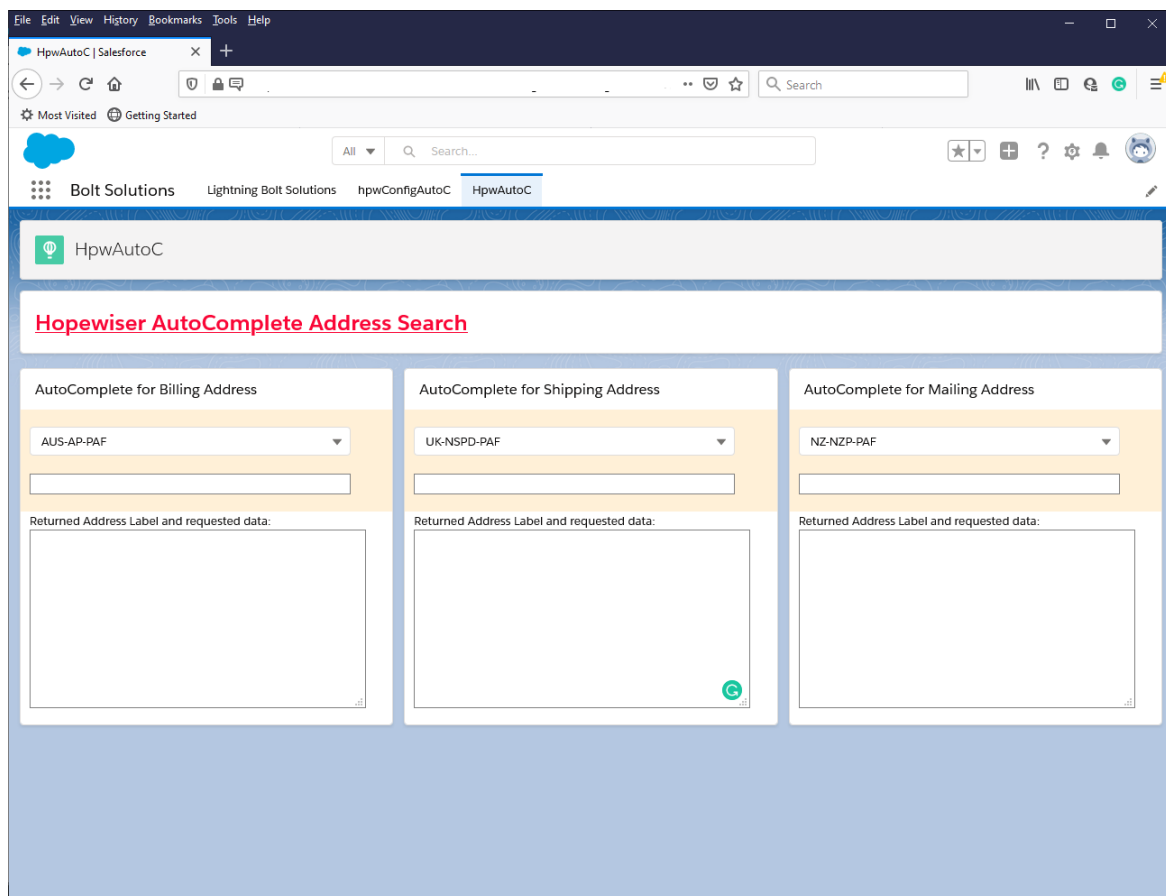


Figure 1: Salesforce Customer Lightning App with 3 Hopewiser AutoComplete LWC Components

2.2 Finding an Address

To find an address with the selected MAF, the user is simply required to start typing any characters in the **Input** box and the Hopewiser AutoComplete LWC component will start the address search (once the minimum number of input characters configured for the LWC is reached) against the selected MAF.

The figure below shows that as soon as user entered “great” in the **Input** box, a drop-down box is opened showing the most relevant matches to the characters entered.

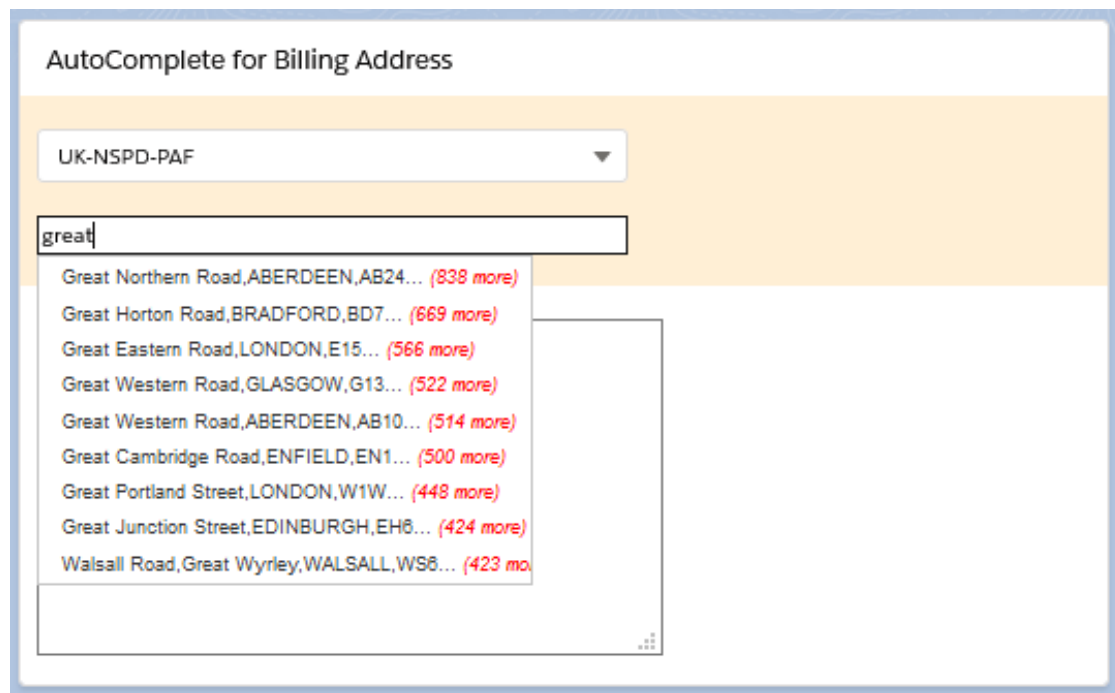


Figure 2: AutoComplete LWC address search

The Hopewiser AutoComplete LWC Address Search lists all the addresses containing the characters “great”, with the most relevant presented first and foremost. Some items presented in the list will be expandable to provide further information, for example where the search entered matches a street name or locality name. The value shown in red highlights how many more addresses are available should the item be selected. Selecting the first item in the list results in the information shown in the figure below.

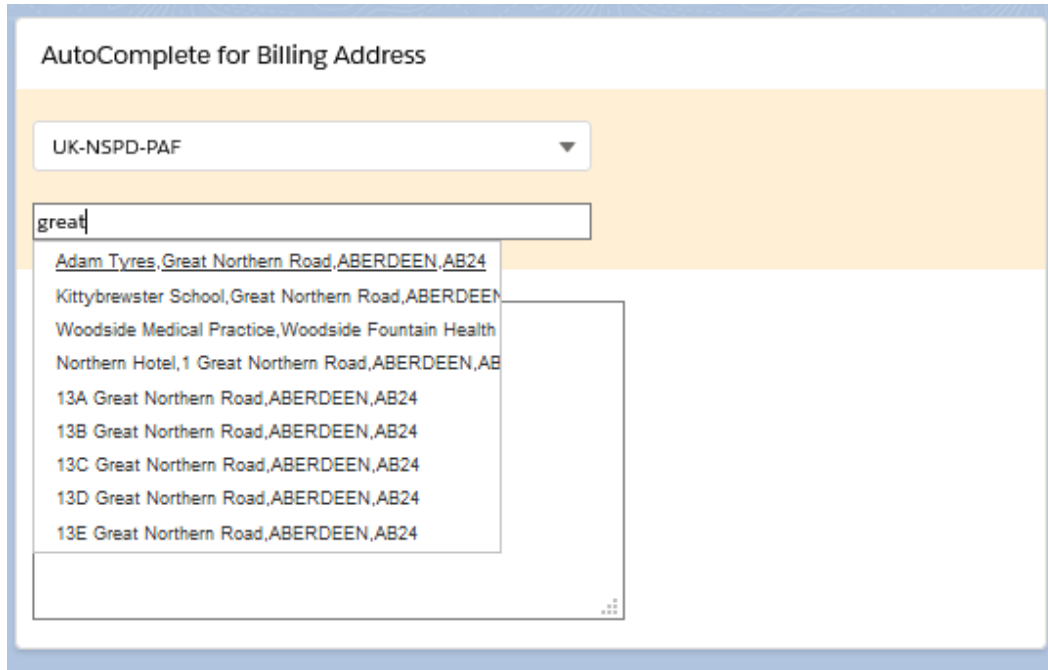


Figure 3: "Great Northern Road, ABERDEEN, AB24" can be expanded further

The search can be continued until the user selects a complete address (that can not be expanded further), the detailed address will then be output into the **Return Address Label and Requested Data** box as shown in the picture below.

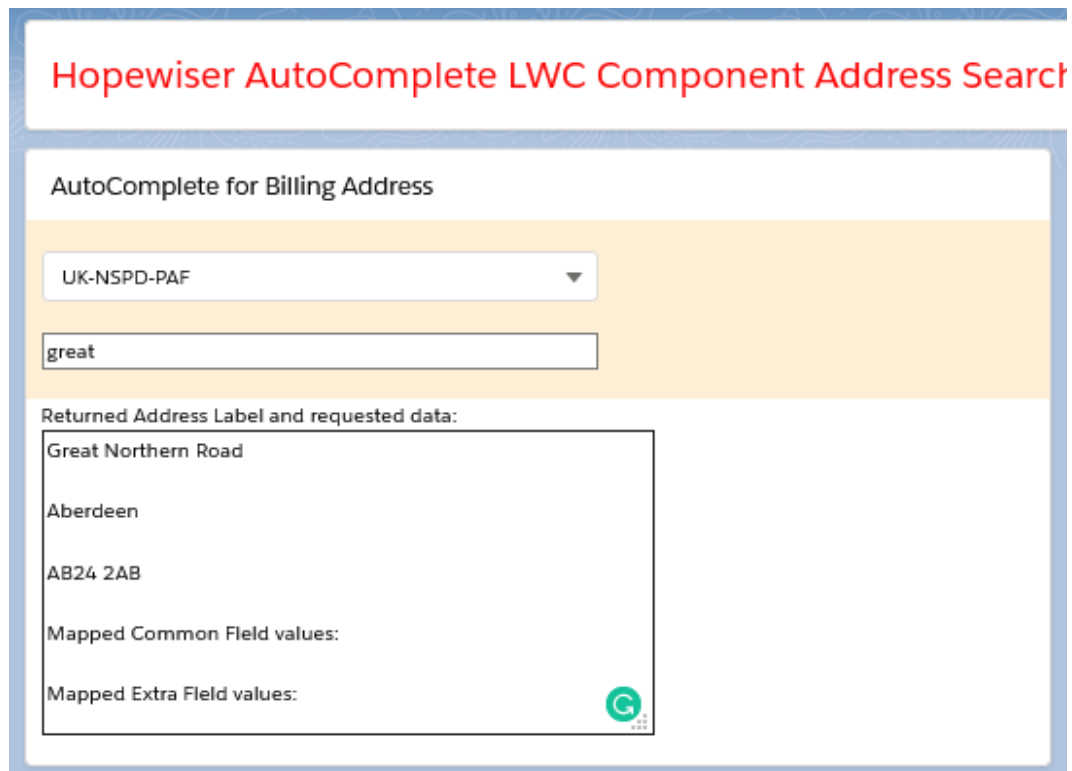


Figure 4: The AutoComplete LWC search result

2.3 Lightning Record Page with Hopewiser AutoComplete LWC

Hopewiser AutoComplete LWC component can be added to Salesforce Lightning Record pages of entity objects (e.g. Account), to verify the Billing and Shipping addresses for the specific record. The figure shown below is the Account Record Page for the “Hopewiser Support” account.

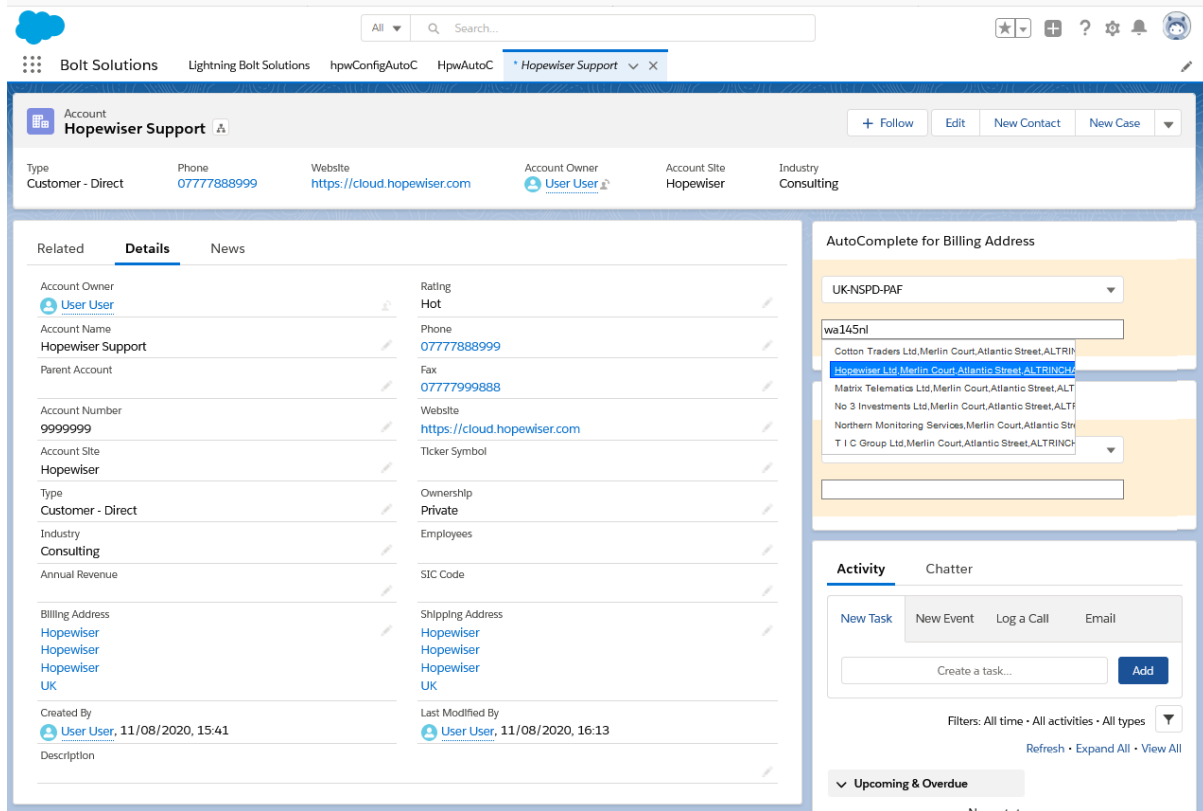


Figure 5: Salesforce Lightning Record Account Page with added AutoComplete LWC component

To verify the Billing Address of the Account Record Page, enter “wa145nl” in the **Input** box of **AutoComplete for Billing Address** window, a list of the most relevant addresses with the same postcode “wa145nl” will be listed in the drop-down list as shown in the image above. By selecting the second item in the list, “Hopewiser Ltd, Merlin Court, Atlantic Street, Altrincham”, the Billing Address (left column of the Account Details Tab) will be verified or changed if the previous account address was not entered correctly. The figure below shows the Billing Address has been changed

from:

Billing Address
Hopewiser
Hopewiser
Hopewiser
UK

to:

Billing Address
Merlin Court
Atlantic Street
ALTRINCHAM
Cheshire
WA14 5NL
United Kingdom

The screenshot displays the 'Hopewiser Support' account details in Salesforce. The interface includes a top navigation bar with tabs for Bolt Solutions, Lightning Bolt Solutions, hpwConfigAutoC, HpwaAutoC, and Hopewiser Support. The account details are organized into a table with two columns: Account Information and Contact Information. The Billing Address section shows 'Merlin Court, Atlantic Street, ALTRINCHAM, Cheshire, WA14 5NL, United Kingdom'. The Shipping Address section shows 'Hopewiser, Hopewiser, Hopewiser, UK'. The right sidebar contains auto-complete fields for Billing and Shipping addresses, both showing 'UK-NSPD-PAF' and 'wa145nl'. The bottom section includes an 'Activity' tab with a 'New Task' button and a 'Create a task...' field.

Related	Details	News
Account Owner	User User	Rating: Hot
Account Name	Hopewiser Support	Phone: 07777888999
Parent Account		Fax: 07777999888
Account Number	9999999	Website: https://cloud.hopewiser.com
Account Site	Hopewiser	Ticker Symbol
Type	Customer - Direct	Ownership: Private
Industry	Consulting	Employees
Annual Revenue		SIC Code
Billing Address	Merlin Court Atlantic Street ALTRINCHAM Cheshire WA14 5NL United Kingdom	Shipping Address Hopewiser Hopewiser Hopewiser UK
Created By	User User, 11/08/2020, 15:41	Last Modified By User User, 11/08/2020, 17:21
Description		

Figure 6: Billing Address has been corrected in the Account Details Page

The Shipping Address in the Details tab of the **Account Record Page** can also be corrected or verified in the same way as the Billing Address correction.

Please refer to the later section on how to add Hopewiser AutoComplete LWC to the Lightning Record Pages, such as Account, Contact, Contract, Leads, etc.

2.4 The Main Window of AutoComplete LWC Component

There are two different views for Hopewiser AutoComplete LWC Component. For a Custom Lightning App, the AutoComplete LWC window contains a **MAF Selection** box (if you have access to more than one MAFs), a user **Input** box and a **Return Address Label and Requested Data** box, as shown in the figure below. A dynamic drop-down selection list will be displayed below the Input box when the address search is triggered.

The screenshot shows a component titled "AutoComplete for Address". It features a yellow header bar. Below the header, there is a "MAF Selection Box" with a dropdown arrow. Underneath is an "Input Box with Drop Dow Address Selection". At the bottom, there is a section titled "Returned Address Label and requested data:" containing a large white box labeled "Returned Address Lebel and Requested Data".

Figure 7: AutoComplete LWC in Customer Lightning Page

For the other Lightning Record Salesforce pages, i.e. Salesforce supported entities such as Account, Contact, Contract, Leads, and Order pages. If the Lightning Record Page contains linked address fields, the Hopewiser AutoComplete LWC component window will contain a **MAF Selection** box if the user has access to more than one MAFs and a user **Input** box for address lookup. The returned addresses will overwrite onto the Lightning Record page's address fields. The figure below shows the add on AutoComplete LWC component window.

The screenshot shows a component titled "AutoComplete for Billing Address". It features a yellow header bar. Below the header, there is a "MAF Selection Box" with a dropdown arrow. Underneath is an "Input Box with Drop Down Address Selection".

Figure 8: AutoComplete LWC component in Salesforce Lightning Record Page

The **MAF Selection** Box is where the Master Address File (MAF) is selected.

The **Input** Box with drop-down address selection is used to enter a search string. The minimum number of characters entered before the search is commenced can be amended, but defaults to three characters. Please refer to the “Hopewiser AutoComplete LWC Administration Manual” for further details. The results of the search will be listed in a drop-down box just below the input box.

The selected address will be output in the **Returned Address Label and Requested Data** for Custom Lightning App. For Lightning Record Pages, the address box for **Returned Address Label and Requested Data** is hidden as the selected address will be written onto the existing address fields of the page.

Note that if a user has subscribed to only one MAF, then the **MAF Selection Box** will be hidden as it becomes the one and only one default MAF. It will be selected automatically when performing an address lookup.

2.5 Salesforce Record Fields and Custom Field mappings

Hopewiser AutoComplete LWC component also allows user to map the exist Salesforce Record fields to Hopewiser's MAF Address Common Fields and Extra Data Fields. The mapping will preconfigured by your Salesforce Administrator via the Hopewiser's AutoComplete LWC Configuration page. (Please refer to the Hopewiser AutoComplete LWC Administration Manual for details)

User can also add customer fields which are supported only by the Hopewiser Master Address File (MAF) and displaying the fields in the Salesforce Record Page.

The example below shows user how to map Salesforce Record Fields and custom fields.

- 1. Add custom fields.**

There are two number fields, Latitude & Longitude, and two text fields, Authority & NHSName are added in this example.

- 2. Sign in to Hopewiser website and select the right MAF**

In configuration page, sign in to the <https://cloud.hopewiser.com> website to get access to Hopewiser's MAF. The MAF used here is UK-NSPD. (Hopewiser supply user with many different MAF contains many different fields to meet customer's requirement)

- 3. Make a field mapping plan**

The Table below list the mapping plan of this practice.

Field Label	Record Field	customer Field	Hopewiser Field Name	Map Field Name	Field Type
Ownership	Y		Organisation	Ownership	text
SIC Code	Y		Extra_HPWORDINAL	Sic	text
Employees	Y		Extra_ORGANISATION_KEY	NumberOfEmployees	number
Industry	Y		Extra_ADDRESS_KEY	Industry	picklist
Latitude		Y	Extra_Grid Latitude	Latitude__c	number
Longitude		Y	Extra_Grid Longitude	Longitude__c	number
NHSName		Y	Extra_NHS Region Name	NHSName__c	text
Authority		Y	Extra Local Authority Name	Authority__c	text

- 4. Map the fields in the configuration page.**

There are eight fields have been mapped in this example, the details can be seen in the figure shown below.

The screenshot shows a web browser window with the Hopewiser configuration page. The page title is "Set AutoComplete Address Search Options". It includes a "Your Account" section with fields for Server, Username, Password, and Dataset. Below this is a "Common Address Field Mappings" section with fields for Department, Organisation, Flat, Floor, Premises, and POBox. The main section is titled "[UK-NSPD-PAF-INTERNAL] - Extra Data Field Mappings" and contains a table with 23 rows, each representing a field mapping. The first eight rows are highlighted in blue, indicating they are mapped fields.

Extra Field Name	Extra Field Mapping
1	Extra_HPWORDINAL Sic
2	Extra_ORGANISATION_KEY NumberOfEmployees
3	Extra_ADDRESS_KEY Industry
4	Extra_Grid_Postcode
6	Extra_Grid_Y
7	Extra_Grid_Latitude Latitude__c
8	Extra_Grid_Longitude Longitude__c
9	Extra_NHS_Region_Code
10	Extra_NHS_District_Code
11	Extra_Ward_Code
12	Extra_Quality_Indicator
13	Extra_LEA_Code
14	Extra_Country_Code
15	Extra_NHS_Region_Name NHSName__c
16	Extra_NHS_District_Name
17	Extra_Local_Authority_Name Authority__c
18	Extra_Electoral_Division
19	Extra_Parliamentary_Constituency
20	Extra_MP_Name
21	Extra_Date_of_postcode_introduction
22	Extra_Date_of_postcode_termination
23	Extra_County_code

Figure 9: Eight mapped fields in configuration page.

5. Do an address search in the Hopewiser AutoComplete LWC Customer Page.

To do an address search with the right field mapping, user need to make sure that the MAF which has been selected is the same MAF as in the configuration page. For example, if the user enter "Hopewiser" in the **Input** box, the returned address fields and the mapped fields will be shown in the **Return Address Label** and the **Required Data** box (please see the figure below)

AutoComplete for Billing Address

UK-NSPD-PAF ▼

hopewiser

Returned Address Label and requested data:

Merlin Court
Atlantic Street
Altrincham
Cheshire
WA14 5NL

Mapped Common Field values:
Organisation: [Ownership = HOPEWISER LTD]

Mapped Extra Field values:
Extra_HPWORDINAL: [Sic = 000445803]
Extra_ORGANISATION_KEY: [NumberOfEmployees = 02951787]
Extra_ADDRESS_KEY: [Industry = 30900908]
Extra_Grid_Latitude: [Latitude__c = 53.3968636]
Extra_Grid_Longitude: [Longitude__c = -2.3713711]
Extra_NHS_Region_Name: [NHSName__c = NORTH, MIDLANDS AND THE EAST PROGRAMME FOR IT (NMEPFIT)]
Extra_Local_Authority_Name: [Authority__c = TRAFFORD]

Figure 10: Hopewiser AutoComplete LWC Component Customer Page search results

There are one Common Address Field and seven Hopewiser Extra Fields have been mapped. The returned values of these fields have been correctly displayed.

6. Do an address search in the Salesforce Record Page.

Figure 10 above displays the search results against the MAF, UK-NSPD-PAF. Enter "Hopewiser" in the Input box. The fields in the account of "Hopewiser Support" have been verified are:

OwnerShip = HOPEWISER LTD
 Industry = 30900908
 Employees = 2951787
 SIC Code = 000445803
 Latitude = 53.3968636
 Longitude = -2.3713711
 Authority = TRAFFORD
 NHSName = NORTH, MIDLANDS AND THE EAST PROGRAMME FOR IT (NMEPFIT)

(the values included here are just test values)

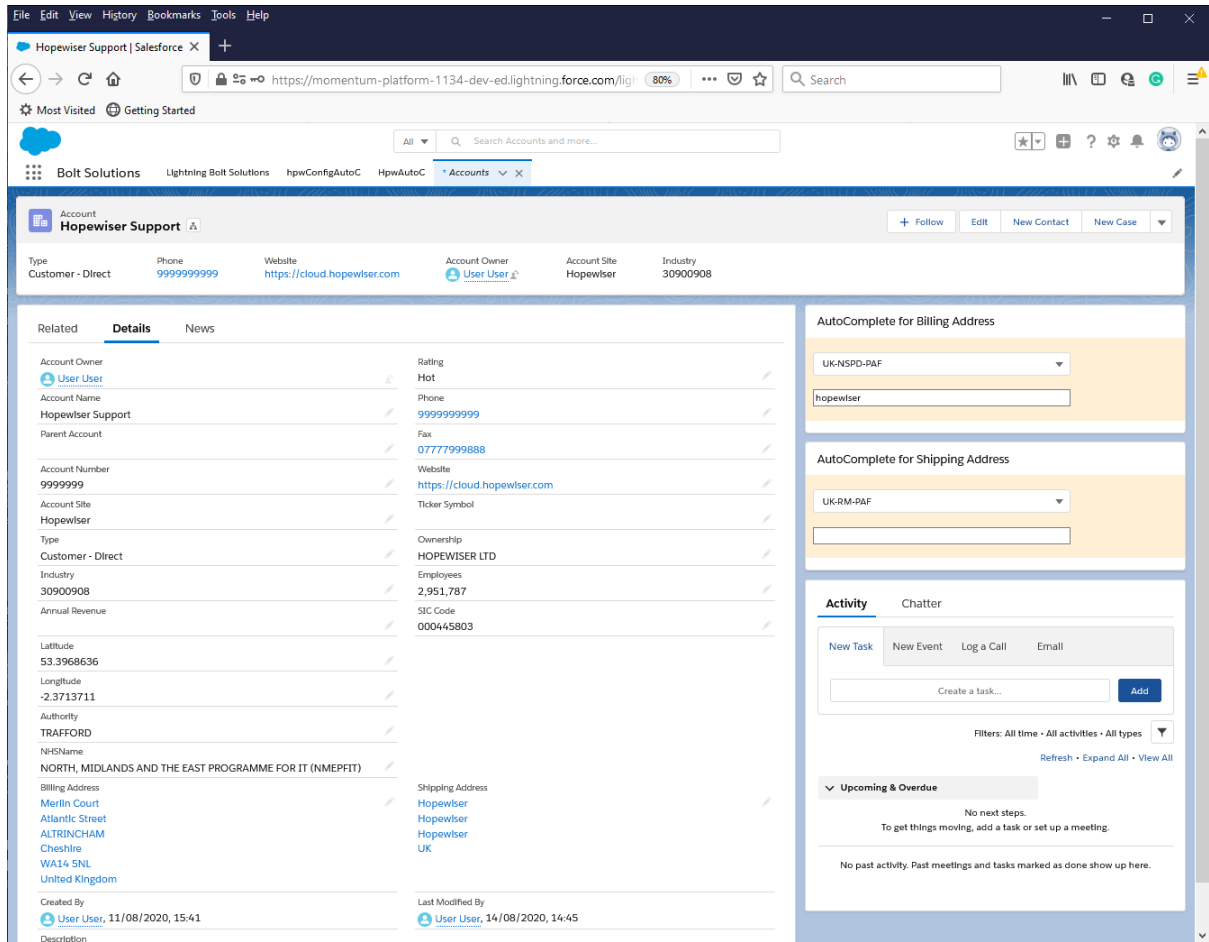


Figure 11: Hopewiser AutoComplete LWC Component Search Results of Address Fields and Customer Fields