



Address Manager

Installation Guide 2.0

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What is the Address Manager

The Address Manager is an add-on for the standard Salesforce.com Account object. It provides the Salesforce.com user with an easy way of transferring the address information from an Account to all of the Contacts linked to the account. This transfers the same address to all contacts which is essential if the contacts are used for product mail outs or invoices.

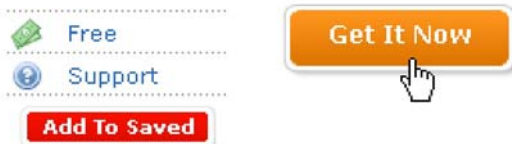
Installing the Address Manager

The Address Manager is downloaded from The Salesforce.com App Exchange, there is no charge for this product but there is no product support. Customisation is available from Onpath _ salesforceapps@onpath.com

Step 1- Download

Click on the “Get it Now” link to download

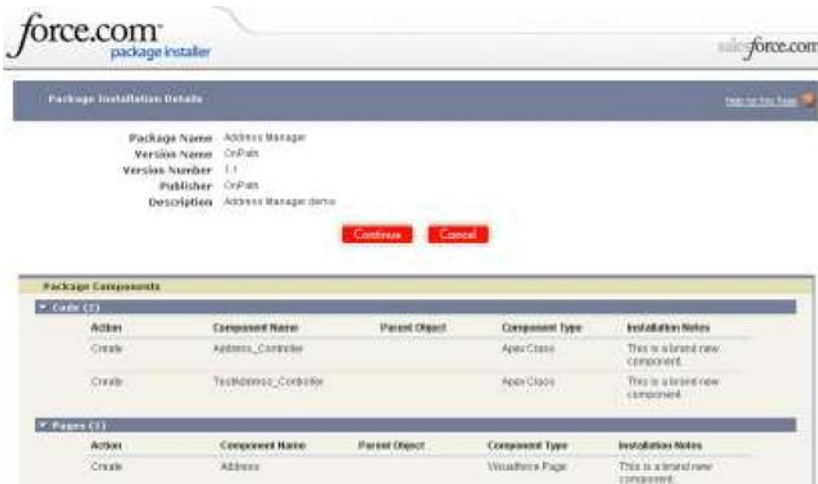
.....



Step 2 - Configure

The link will direct you to the download site. This should look like the screen below.

Click "Continue"



Package Installation Details

Package Name: Address Manager
 Version Name: OnPath
 Version Number: 1.1
 Publisher: OnPath
 Description: Address Manager demo

[Continue](#) [Cancel](#)

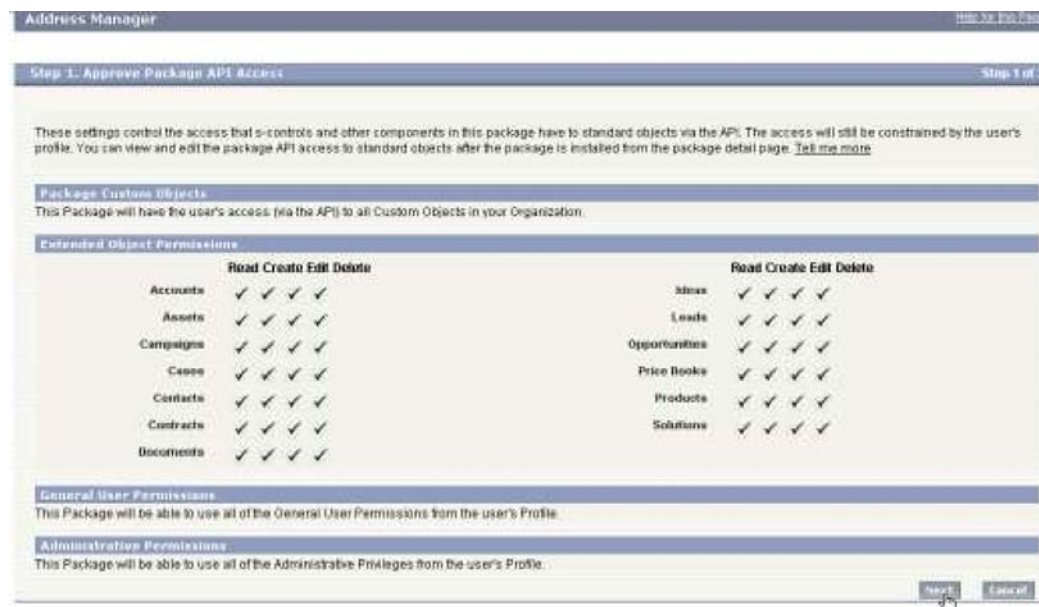
Package Components

Code (2)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Address_Controller		Apex Class	This is a brand new component.
Create	TestAddress_Controller		Apex Class	This is a brand new component.

Pages (1)

Action	Component Name	Parent Object	Component Type	Installation Notes
Create	Address		Visualforce Page	This is a brand new component.



Address Manager

Step 1: Approve Package API Access

These settings control the access that s-controls and other components in this package have to standard objects via the API. The access will still be constrained by the user's profile. You can view and edit the package API access to standard objects after the package is installed from the package detail page. [Tell me more](#)

Package Custom Objects
 This Package will have the user's access (via the API) to all Custom Objects in your Organization.

Extended Object Permissions

	Read	Create	Edit	Delete
Accounts	✓	✓	✓	✓
Assets	✓	✓	✓	✓
Campaigns	✓	✓	✓	✓
Cases	✓	✓	✓	✓
Contacts	✓	✓	✓	✓
Contracts	✓	✓	✓	✓
Documents	✓	✓	✓	✓
Idocs	✓	✓	✓	✓
Leads	✓	✓	✓	✓
Opportunities	✓	✓	✓	✓
Price Books	✓	✓	✓	✓
Products	✓	✓	✓	✓
Solutions	✓	✓	✓	✓

General User Permissions
 This Package will be able to use all of the General User Permissions from the user's Profile.

Administrative Permissions
 This Package will be able to use all of the Administrative Privileges from the user's Profile.

[Next](#) [Cancel](#)

Click "Next"

Package Installer

Address Manager

Step 3: Install Package

The package is ready to be installed. Click Install to continue.

☐ Ignore Apex test failures that may cause the installed application not to function properly.

Previous

Install

Install complete

[Help for this Page](#)

The components contained in this package have been successfully installed.

The final steps in the install process are to:

1. Change the visibility settings for any installed documents, reports, dashboards, letterheads, email templates, and custom fields on standard objects. By default, these components are visible to all users.
2. Set the Running User for any installed dashboards or analytic snapshots; by default, it is set to you.
3. Specify the appropriate recipients for any installed workflow tasks.
4. Specify the appropriate assignees for any installed workflow alerts.
5. Specify the appropriate user for workflow field updates that modify the Owner field or user lookups; by default, it is set to you.
6. Create a schedule for any installed analytic snapshots.
7. Configure any additional settings for this package from the package detail page.

View Package Contents

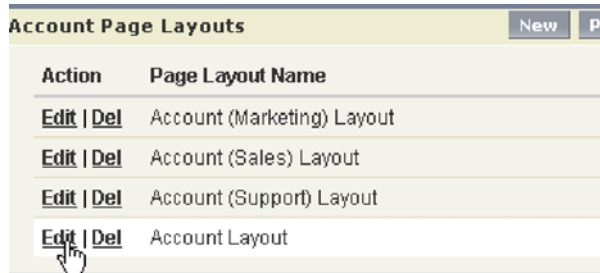
Click "Install"

The Download is now complete

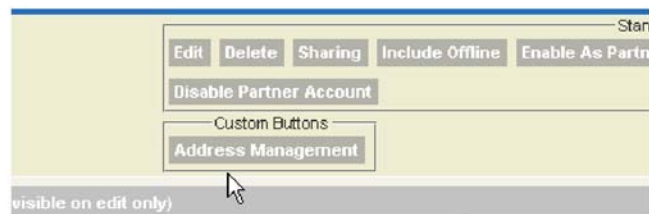
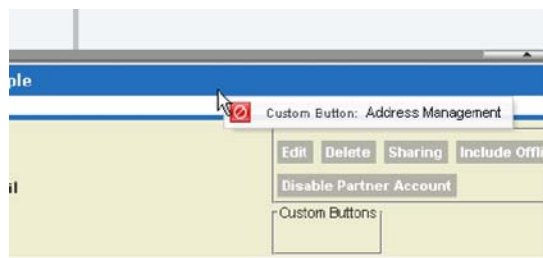
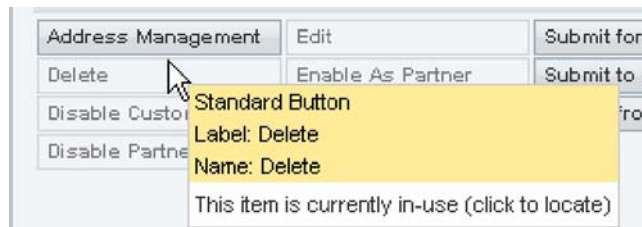
Step 3- Page Setup

There is a button that the user will click to use The Address Manager, this has to be added to the Account page. Please follow the instructions below to add the button.

Go to Set up / Accounts / Page layouts



Click "edit"



Drag the Address Manager Button to the Custom Button holder

Step 4 - Test

Open an Account and check to see in the Account Manager Button is visible on the page.

Click the button to test the application.

Address Management	
Rating	
Phone	(785) 241-6200
Fax	(785) 241-6201

Step 5 – Using the Address Manager

The address manger is an easy way to manage and correct addresses at the account level and then transfer the address to every contact attached to the account.

The top half of the page allows the user to manipulate and save the address information for the account.



Address Manager by OnPath
 For customisation of this application or customisation of Salesforce.com
 OnPath: Tel:613 842 4167 Email: Salesforceapps@onpath.com Web: www.onpath.com

Address Informations

Exchange Billing & Shipping Save

Manage Billing (Primary) & Shipping address

Billing (Primary)

Copy Billing to Shipping

Clear Billing

Shipping

Copy Shipping to Billing

Clear Shipping

Billing Street1165 Keston Street

Billing State/ProvinceON

Billing Zip/Postal CodeK1B 3N9

Billing CountryCanada

Billing CityOttawa

Shipping Street

Shipping State/Province

Shipping Zip/Postal Code

Shipping Country

Shipping City

Exchange Billing & Shipping Save

Contacts Address Informations

Transfer Addresses to Contacts

Transfer Addresses to Contacts

Account have: 109 contact(s)

The user can copy or exchange addresses from billing to shipping and vice versa and can over write any of the address fields. Once all changes have been made, clicking the save button will write these changes to Salesforce.com

The second half of the page is where changes are made to the contacts that are connected to the account.

Contacts Address Informations
Transfer Addresses to Contacts

Transfer Addresses to Contacts

Account have: 108 contact(s)

All selected contacts will have their addresses changed as per the table below:

Account Billing Address => Contact Mailing Address
Account Shipping Address => Contact Other Address

	First Name	Last Name	Phone	Email	M.Country	M.State/Province	M.City	M.Street	M.PostalCode
☐	Brian	Darmanie	(613) 842-4167	bdarmanie@onpath.com	Canada	ON	Ottawa	1155 Lola St.	K1K 4C1
☐	Krissie	Thorton	(613) 564-6565	kharrigan@onpath.com	Canada	ON	Ottawa	1155 Lola St.	K1K 4C1
☒	Nebojsa (Nash)	Zgonjanin	(613) 842-4120	nebojsa.zgonjanin@onpath.com	Canada	ON	Ottawa	1165 Kenaston St.	
☐	Caine	Ruckstuhl	(613) 842-4185	cruckstuhl@onpath.com	Canada	ON	Ottawa	1155 Lola St.	K1K 4C1

The table shows the current Contact address information in Salesforce.com. The Last Name field is hyperlinked to the contact record so that the record can be easily opened.

Tick the contacts that would like to have the same address as the account

☒	Nebojsa (Nash)	Zgonjanin
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Clicking the "Transfer Addresses to Contacts" button will over write ALL address information in each contact that has been ticked with the addresses set for the account.

Account Billing Address will copy to every ticked contacts mailing address

Account Shipping Address will copy to every ticked contacts other address



Please be sure that every ticked contact has the same address as its account record. Salesforce.com does not keep a record of the previous contents of an address field. All previous address information will be overwritten when the button is pressed.

Transfer Addresses to Contacts