

Address Finder - Auto-search addresses for improved accuracy and reduced time

Installation and User Guide

Contents

1.	Product Overview	3
2.	Product Benefits	3
3.	Product Installation.....	Error! Bookmark not defined.
4.	Product Configuration.....	Error! Bookmark not defined.
4.1	Add Objects Applicable with Address Finder.....	5
4.2	Define Address Mappings.....	5
4.3	Add Custom Button to the Source Object.....	6
5	About Damco.....	8
6	Contact Us.....	9

1. Product Overview

Address Finder is your one stop solution for all address management woes in your Salesforce org!!!

As a Salesforce administrator your entire focus is to get the processes automated with the best data quality and ease of use.

Filling address details of every record manually is very time consuming and frustrating. This can also lead to wrong and missing information which causes operational hazards down the line.

At Damco Solutions, we constantly innovate to help businesses gain more efficiency with the best automation's. Therefore, we have designed & developed a Salesforce Package – Address Finder which does exactly what every business would love to have for improved accuracy and reduced time.

Address Finder helps you find, record and validate the addresses of your accounts, contacts or any other standard or custom objects easily. No matter if you are using standard address fields or custom fields to capture address in your record, you can easily define the address fields mapping which you can use to update using an effective and accurate address search engine.

It is an address validation, search and auto-completion tool for Salesforce which will enhance the user productivity by faster address updates and correctness of data in the Salesforce org which is critical for business systems.

Empower your users to do their job easily, efficiently and quickly without writing a single line of code. With no extra configurations and automations to care about save your crucial time, resources and efforts to devote into your core business challenges.

2. Product Benefits

Convenient

Define the Address mappings for the source objects and use the mapping to find, record and validate the address fields (defined as source fields while defining address mappings) for the source object by adding a new custom button 'Add/Validate Address' on the source object.

Flexible

Address finder is very flexible as you can define more than one Address mappings for the same source object by selecting different source field values. Based on selected mapping you can record, find and validate address fields for the source object.

Easy

Forget triggers and other complicated mechanisms to populate address details; just 2 step easy configuration to enable automated mapping and populating address details by auto search.

Extensible

Define mappings for the new objects and addition of new fields to the existing objects on the go.

Address Finder – Auto-search addresses for improved accuracy and reduced time.

Timesaver

No need of filling each address detail separately. Just auto search for the address and all details will be populated for target fields defined in the selected mapping.

User Friendly

Needs Administrator's involvement for the initial configurations only. Users can then proceed by selecting the right mapping for the desired address field of the source object while performing auto search of address and populating address details autocratically.

3. Product Installation

Salesforce Administrators and Users with the "Download AppExchange packages" permission can download and install 'Address Finder' package from AppExchange, a complete marketplace for cloud computing applications and consulting partners.

1. Click the AppExchange link in your organization or go to www.appexchange.com.
2. Browse the AppExchange site to find the 'Address Finder' application to install.
3. Click 'Get It Now' from the application information page.
4. Select your environment type: production or sandbox (test).
5. Enter the requested information. For production environments, enter your username and password, read the user terms, accept the license agreement and click Install. For sandbox environments, complete the information in the form provided and click Submit. This package is removed from your sandbox organization whenever you create a new sandbox copy.
6. Review the package items and click Continue.
7. Review the API access that package components have been granted to ensure they are acceptable, and click next if they are. If they are not, click Cancel. For more information, see "About API and Dynamic Apex Access in Packages" in the Salesforce online help.
8. Grant access to all users specifies the following settings on all internal custom profiles:
 - Object permissions— "Read," "Create," "Edit," "Delete," "View All," and "Modify All" are all enabled.
 - Field-level security — Set to visible and editable for all fields.
 - Apex classes — Enabled.
 - Visualforce pages — Enabled.
 - App settings — Enabled.
 - Tab settings — Determined by the package creator.
 - Page layout settings — Determined by the package creator.

Address Finder – Auto-search addresses for improved accuracy and reduced time.

- Record Type settings—Determined by the package creator.
9. Click Install to install all the components in the package you have selected.

4. Product Configuration

Once you have installed the Package from the App Exchange and configured security permissions for the desired users/profiles there is a three-step process to create and use the defined mappings for a standard/custom object. These steps can be performed by a system administrator and the desired field level security for the objects involved in the mapping as well as application itself must be configured.

4.1 Add Objects Applicable with Address Finder

Go to Address Finder Settings Tab and Enable Objects to be used for Address Finder. You can add standard as well as custom objects for the mapping and change them anytime. You will not be able to define Address field mappings without this configuration in place.

4.2 Define Address Mappings

Go to Address Finder App and select “Address Mappings” tab. Create “New mappings” by providing following details:

Source Object

Source Object of the mapping can be selected from the list of available options as configured earlier. It's the object where you want to Add/validate address details using the Address Mapping

On selection of the Source Object, a section will appear below where user needs to give details of the mapping-

Mapping Name

Provide a meaningful name to the mapping. This is what the users will use to select an applicable mapping.

Description

Give a brief description about the mapping. This description will help the users to identify the correct mapping to use, in case multiple mappings exists for same source object.

Mapping Type

Here you will find two mapping types, Single Field and Multiple Fields Mapping, on the basis of these radio buttons, it will be decided which type of mapping will be created.

- Single Field - It allows the user to map the Full Address to one Single field of the Source Object
- Multiple Field - It allows the user to segregate one complete address into multiple fields of the Source Object

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On providing all the above details, a new mapping section with two columns 'Target Field' and 'Source Field' will appear below where the field mappings can be defined as per the mapping type selected earlier. Corresponding to each target field a source field must be selected whose value you need to populate or validate while performing auto search or validation of address using Address Finder.

- In case of 'Single Field Mapping', the target field contains Full Address which is be mapped to one single field of the Source Object. Under Source field column, user need to provide the field, whose value user want to auto populate using Address Finder.
- In case of 'Multiple Field Mapping', the target field contains standard address labels like 'Street', 'City', 'State', 'Postal Code' and 'Country'. Corresponding to each of these, a source object field will be selected, which will hold the respective values as per the auto search using Address Finder.

Once you have defined the Address Mappings click on the "Save Mappings" button to save it.

By saving, this will be saved as a mapping on the Source Object.

On saving this, it will redirect to the record detail page of the mapping you just saved.

4.3 Add Custom Component to the Source Object

Before doing the following changes, User need to ensure that Custom Domain is Enabled for your Org. If not, please visit the below mentioned link to setup a custom domain name.

https://help.salesforce.com/articleView?id=domain_name_overview.htm&type=5

Note: If Custom Domain is not enabled, user will not be able to add the custom component to the page

In order to enable the users to utilize the mappings defined above on desktop, add a custom component on the Source object record page.

- On the Source Object record page, select the record for which you want to use this Address Mapping.
- On the object record detail page, click on Salesforce Set Up Menu  Icon on top right.
- There user will find options like- Set Up, Developer Console, Edit Page, Edit Object.
- You need to click on 'Edit Page'. This will redirect you to the object record page in Edit mode.
- On the extreme left, under 'Lightning Components' you will find all the components, Standard as well as Custom.
- In Custom Components, you will find 'Address Finder Bundle' or you can search for it.
- Now, you just need to drag this and drop on the left section under Activity or wherever you find suitable.
- Click on Save Button and then Activate.

In order to utilize the defined address mappings on Salesforce1 mobile app, you'll have to create a "Quick Action".

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- Go to Setup > Object Manager > your source Object e.g. <Account>
- Now Select the 'Button, Links and Actions' from the side panel.
- Click 'New Action'. In Action Type, select 'Lightning Component' and from 'Lightning Components' choose: AddFin:Address_Finder_Bundle
- Set the desired height in pixels or choose the default size of 250px.
- Add a Label and name which who want to use and Save the Quick action.

Once the Quick action is saved, go to Page Layouts from the side panel of the source object. Open the layout on which you want to add Quick Action.

From the 'Mobile & Lightning Actions' panel select your quick action and drop it onto the Layout. Save the Layout to make the changes visible.

Once you have added the Custom Component/Quick action to the layout of that particular Source Object. Users are all set to use the mapping for adding and validating address details for the source object.

Now, on the Source Object record page, record for which you want to use the mapping. Select the record.

Wherever user has added the Address Finder Component, all the mappings for this particular source object will be available under label 'Available Address Mappings', with their Descriptions.

- User need to select the desired mapping from Available Address Mappings.
- To fetch the address from Google, search for that address in 'Search Address from Google' box and choose the most suitable suggestion.

PS: To get access for Google address search, user must ensure that a valid Google Maps API key is stored in the Custom Settings.

In order to get the Google Maps API key, visit the following link

<https://developers.google.com/maps/documentation/javascript/get-api-key>

Once you get the API Key, In order to store this in Custom Settings, user need to follow the below mentioned steps-

1. Set Up > Schema Settings > Manage list custom settings type - Enable this option (if not already enabled)
2. Set Up > Custom Settings > Google API > Manage > New
 - a. Give a valid Name for the key
 - b. In API Key- enter the Google Maps API key that you generated

Note: In case, Google API is not available, user will get the error and will not be able to proceed.

- OR User can use  Icon to fetch user's current location and the location will be populated into the address fields.
- You can even validate this address by making changes to it manually.

Address Finder – Auto-search addresses for improved accuracy and reduced time.

- Hit Save button and all the data from the address fields will be saved and a success message is displayed.

5 About Damco

Damco is a perfect technology partner enabling enterprises to make profound IT impact on their businesses in the constantly changing marketplace. For around two decades, we have been a steadfast company focused on the progress of our clients and developing trustworthy relationships with our customers, partners and employees.

Damco Salesforce CoE has helped businesses improve workforce productivity, as they work to achieve customer satisfaction and implement technology best practices. Our team of Salesforce Experts and tech pros help businesses to leverage Salesforce to improve workforce productivity, customer satisfaction and develop powerful and scalable products faster.



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