



Hopewiser Atlas for Salesforce.com

Administration Manual

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1 Introduction

Welcome to Hopewiser Atlas for Salesforce.com.

Hopewiser Atlas for Salesforce.com provides an easy way to capture addresses from a postal code and premise number or name, or from an incomplete address. 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 manual is aimed at administrators of Hopewiser Atlas for Salesforce.com.

1.2 Operation

Please see the separate Hopewiser Atlas for Salesforce.com User Guide for detailed operation instructions.

1.3 Version Information

To view version information, click the Hopewiser logo in the address lookup window or in the program options editor to display the About Box.



Click the Hopewiser Logo

The About Box shows the version numbers of the application, its component parts and the data set you are using. Should you need to contact technical support, it is useful to have these version numbers ready to enable the support staff to provide the most efficient response.

2 Installation

Hopewiser Atlas for Salesforce.com can be installed into Salesforce.com. It has no additional hardware or third-party software requirements beyond those required for Salesforce.com.

You will require an AddressServer in the Cloud account.

Log on to Salesforce.com as an administrator/developer.

The navigation paths mentioned in this section are described for users running Salesforce.com in **Classic mode**. If you are running Salesforce.com in **Lightning mode**, access to the components and page layouts are controlled by **OBJECT MANAGER**, the navigation paths are changed slightly. Please refer to **Appendix C** - Accessing components in Lightning mode for more details.

2.1 Install the Installation Package(s)

The installation packages are unmanaged packages that contain the static resources, Visualforce pages and the Find Address buttons.

If you have Salesforce.com **Essentials** edition, visit this URL to install the package for Leads, Accounts and Contacts into your organisation: <u>https://login.salesforce.com/packaging/installPackage.apexp?p0=04t24000000Ahfe</u>

If you have Salesforce.com **Professional** edition or higher, visit this URL to install the package for address lookup for Leads, Accounts, Contacts, Orders and Contracts: <u>https://login.salesforce.com/packaging/installPackage.apexp?p0=04t24000000Ep0m</u>

Note: If you are installing into a sandbox organization please visit these URLs instead: <u>http://test.salesforce.com/packaging/installPackage.apexp?p0=04t24000000Ahfe</u> or, for Professional edition and higher:

http://test.salesforce.com/packaging/installPackage.apexp?p0=04t24000000Ep0m

If you wish instead to install the package components manually, please follow the steps in Appendix A before continuing.

2.2 Add the Find Address buttons to the Page Layouts

Add the Lead Find Address button.

- In Salesforce.com, navigate to Setup > Customize > Leads > Page Layouts
- In the table of Lead Page Layouts, locate the row that has a Page Layout Name of Lead Layout.
- In that row, under **Action** click **Edit**.
- In the selection of components, select Buttons.
- Drag the **Find Address** button from the components area and drop it into the **Custom Buttons** area, as shown in the following screenshot.
- Click the **Save** button.

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Drag and Drop the Find Address Button

Add the Account Find Billing Address and Find Shipping Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Page Layouts
- In the table of Account Page Layouts, locate the row that has a Page Layout Name of Account Layout.
- In that row, under **Action** click **Edit**.
- In the selection of components, select **Buttons**.
- Drag the **Find Billing Address** button from the components area and drop it into the **Custom Buttons** area.
- Drag the **Find Shipping Address** button from the components area and drop it into the **Custom Buttons** area.
- Click the **Save** button.

Add the Contact Find Mailing Address and Find Other Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Page Layouts
- In the table of Contact Page Layouts, locate the row that has a Page Layout Name of Contact Layout.
- In that row, under Action click Edit.
- In the selection of components, select **Buttons**.
- Drag the **Find Mailing Address** button from the components area and drop it into the **Custom Buttons** area.
- Drag the **Find Other Address** button from the components area and drop it into the **Custom Buttons** area.
- Click the **Save** button.

If you have Salesforce.com Professional Edition or higher, add Find Address buttons to Orders and Contracts.

Add the Order Find Billing Address and Find Shipping Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Orders > Page Layouts
- In the table of Order Page Layouts, locate the row that has a Page Layout Name of Order Layout.
- In that row, under **Action** click **Edit**.
- In the selection of components, select Buttons.
- Drag the **Find Billing Address** button from the components area and drop it into the **Custom Buttons** area.
- Drag the **Find Shipping Address** button from the components area and drop it into the **Custom Buttons** area.
- Click the **Save** button.

Add the Contract Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Contracts > Page Layouts
- In the table of Contract Page Layouts, locate the row that has a Page Layout Name of Contract Layout.
- In that row, under Action click Edit.
- In the selection of components, select **Buttons**.
- Drag the **Find Billing Address** button from the components area and drop it into the **Custom Buttons** area.
- Click the **Save** button.

Hopewiser Atlas for Salesforce.com is now installed. Before use, you must set the Program Options (see section 3), in particular your Dataset, Username and Password (section 3.2).

3 Configuration

3.1 Program Options

Program options can be viewed and changed using the included editor.

Log on to Salesforce.com as an administrator.

Navigate to https://<xxx>.salesforce.com/apex/hpw_config, where <xxx> varies depending on your territory.

• For example if, after logging on to Salesforce.com, you are taken to a URL beginning https://eu5.salesforce.com, you would navigate to https://eu5.salesforce.com/apex/hpw_config.

You can click the **Your Account** link to log on or sign up for an account on the Hopewiser Services website.

When you have configured the options described in the following section, click the **Save** button to save your changes.

3.2 General Options

Server

This is the URL of the service you wish to use, typically https://cloud.hopewiser.com.

Username, Password

The username and password you use to connect to the service.

Dataset

This is the reference of the dataset you wish to use, e.g. uk-rm-paf-internal. After you have entered a Server, Username and Password, click the Sign In button to list your datasets.

Override Country

When this option is blank, the value of the Country field in the completed address is obtained from the PAF. When this option is not blank, the Country field of the address is forced to the specified value. This can be useful if you use an abbreviation or a code to represent the country. For example, if you are using a UK PAF you could force the country to have the value "UK" instead of "UNITED KINGDOM".

Include Organisation Name in returned address

When checked, Organisation Names that are listed in the PAF are included in the completed address. When cleared, Organisation Names are not included.

Include only PAF-listed House Name in returned address

When checked, the completed address will contain a House Name only if it is listed in the PAF. When cleared, the completed address will retain any House Name that was entered if the address is matched against the PAF.

Include only PAF-listed District in returned address

When checked, the completed address will contain a District only if it is listed in the PAF. When cleared, the completed address will retain any District that was entered if the address is matched against the PAF.

4 Un-installation

Log on to Salesforce.com as an administrator/developer.

The navigation paths mentioned in this section are described for users running Salesforce.com in **Classic mode**. If you are running Salesforce.com in **Lightning mode**, access to the components and page layouts are controlled by **OBJECT MANAGER**, the navigation paths are changed slightly. Please refer to **Appendix C** - Accessing components in Lightning mode for more details.

4.1 Remove the Find Address buttons from the Page Layouts

Remove the Lead Find Address button.

- In Salesforce.com, navigate to Setup > Customize > Leads > Page Layouts
- In the table of Lead Page Layouts, locate the row that has a Page Layout Name of Lead Layout.
- In that row, under **Action** click **Edit**.
- In the selection of components, select **Buttons**.
- Drag the **Find Address** button from the **Custom Buttons** area and drop it into the components area.
- Click the **Save** button.

Remove the Account Find Billing Address and Find Shipping Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Page Layouts
- In the table of Account Page Layouts, locate the row that has a Page Layout Name of Account Layout.
- In that row, under Action click Edit.
- In the selection of components, select **Buttons**.
- Drag the **Find Billing Address** button from the **Custom Buttons** area and drop it into the components area.
- Drag the **Find Shipping Address** button from the **Custom Buttons** area and drop it into the components area.
- Click the **Save** button.

Remove the Contact Find Mailing Address and Contact Find Other Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Page Layouts
- In the table of Contact Page Layouts, locate the row that has a Page Layout Name of Contact Layout.
- In that row, under Action click Edit.
- In the selection of components, select **Buttons**.
- Drag the **Find Mailing Address** button from the **Custom Buttons** area and drop it into the components area.
- Drag the **Find Other Address** button from the **Custom Buttons** area and drop it into the components area.
- Click the **Save** button.

If you have Salesforce.com Professional Edition or higher, remove the Find Address buttons from Orders and Contracts.

Remove the Order Find Billing Address and Order Find Shipping Address buttons.

- In Salesforce.com, navigate to Setup > Customize > Orders > Page Layouts
- In the table of Order Page Layouts, locate the row that has a Page Layout Name of Order Layout.
- In that row, under **Action** click **Edit**.
- In the selection of components, select Buttons.
- Drag the **Find Billing Address** button from the **Custom Buttons** area and drop it into the components area.
- Drag the **Find Shipping Address** button from the **Custom Buttons** area and drop it into the components area.
- Click the Save button.

Remove the Contract Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Contracts > Page Layouts
- In the table of Contract Page Layouts, locate the row that has a Page Layout Name of Contract Layout.
- In that row, under Action click Edit.
- In the selection of components, select **Buttons**.
- Drag the **Find Billing Address** button from the **Custom Buttons** area and drop it into the components area.
- Click the **Save** button.

4.2 Uninstall the Installation Package(s)

If you installed the installation package, navigate to Setup > Develop > Installed Packages. - Click Uninstall next to the package named either Hopewiser Atlas or Hopewiser Atlas Professional to complete the uninstallation.

Otherwise if you installed the static resources, Visualforce pages and Find Address buttons manually, please follow the steps in Appendix B.

Appendix A – Installing the components manually

A1 Upload the Static Resources

In Salesforce.com, navigate to **Setup > Develop > Static Resources**.

Upload the **Atlas** zipped resource.

- Click the **New** button.
- In Name type Atlas.
- In **Description type** Hopewiser Atlas for Salesforce.com.
- In File, click the Browse button and navigate to the Static Resources folder in your Atlas for Salesforce installation files. Select Atlas.zip then click Open.
- In Cache Control, select Public.
- Click the Save button.

Upload the **hpwConfig_xml** text resource.

- Click the **New** button.
- In Name type hpwConfig_xml.
- In **Description type** Hopewiser Atlas Configuration.
- In File, click the Browse button and navigate to the Static Resources folder in your Atlas for Salesforce installation files. Select hpwConfig_xml.txt then click Open.
- In Cache Control, select Public.
- Click the **Save** button.

A2 Create the Visualforce Pages

In Salesforce.com, navigate to **Setup > Develop > Pages**.

Create the Lead Address page.

- Click the **New** button.
- In Label type Lead Address.
- In Name type LeadAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the **Visualforce Pages** folder in your Atlas for Salesforce installation files. Open **LeadAddress.vfp.txt** in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **LeadAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Account Billing Address page.

- Click the **New** button.
- In Label type Account Billing Address.
- In Name type AccountBillingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the **Visualforce Pages** folder in your Atlas for Salesforce installation files. Open **AccountBillingAddress.vfp.txt** in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **AccountBillingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Account Shipping Address page.

- Click the **New** button.
- In Label type Account Shipping Address.
- In Name type AccountShippingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the Visualforce Pages folder in your Atlas for Salesforce installation files. Open AccountShippingAddress.vfp.txt in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **AccountShippingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Contact Mailing Address page.

- Click the **New** button.
- In Label type Contact Mailing Address.
- In Name type ContactMailingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the **Visualforce Pages** folder in your Atlas for Salesforce installation files. Open **ContactMailingAddress.vfp.txt** in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **ContactMailingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Contact Other Address page.

- Click the **New** button.
- In Label type Contact Other Address.
- In Name type ContactOtherAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the Visualforce Pages folder in your Atlas for Salesforce installation files. Open ContactOtherAddress.vfp.txt in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **ContactOtherAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Configuration page.

- Click the **New** button.
- In Label type Set Atlas Options.
- In Name type hpw_config.
- In **Description type** Hopewiser Atlas Options.
- In Windows Explorer, navigate to the Visualforce Pages folder in your Atlas for Salesforce installation files. Open hpw_config.vfp.txt in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **hpw_config.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

If you have Salesforce.com Professional Edition or higher, create Visualforce pages for Orders and Contracts.

Create the Order Billing Address page.

- Click the **New** button.
- In Label type Order Billing Address.
- In Name type OrderBillingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the **Visualforce Pages** folder in your Atlas for Salesforce installation files. Open **OrderBillingAddress.vfp.txt** in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **OrderBillingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Order Shipping Address page.

- Click the **New** button.
- In Label type Order Shipping Address.
- In Name type OrderShippingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the Visualforce Pages folder in your Atlas for Salesforce installation files. Open OrderShippingAddress.vfp.txt in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **OrderShippingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

Create the Contract Billing Address page.

- Click the **New** button.
- In Label type Contract Billing Address.
- In Name type ContractBillingAddress.
- In **Description type** Hopewiser Atlas for Salesforce.
- In Windows Explorer, navigate to the Visualforce Pages folder in your Atlas for Salesforce installation files. Open ContractBillingAddress.vfp.txt in Notepad, select all the text (Ctrl+A) and copy it to the clipboard (Ctrl+C).
- In the **Visualforce Markup** tab, delete any existing text (Ctrl+A then Del) then paste the contents of **ContractBillingAddress.vfp.txt** that you just copied (Ctrl+V).
- Click the **Save** button.

A3 Create the Find Address buttons

Create the Lead Find Address button.

- In Salesforce.com, navigate to Setup > Customize > Leads > Buttons, Links, and Actions
- Click New Button or Link.
- In Label type Find Address.
- In Name type FindAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In Content select Lead Address [LeadAddress].
- Click the **Save** button.

Create the Account Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons, Links, and Actions
- Click New Button or Link.
- In Label type Find Billing Address.
- In Name type FindBillingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In Content select Account Billing Address [AccountBillingAddress].
- Click the Save button.

Create the Account Find Shipping Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons, Links, and Actions
- Click New Button or Link.
- In Label type Find Shipping Address.
- In Name type FindShippingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In **Content select** Account Shipping Address [AccountShippingAddress].
- Click the **Save** button.

Create the Contact Find Mailing Address button.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Buttons, Links, and Actions
- Click New Button or Link.
- In Label type Find Mailing Address.
- In Name type FindMailingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In Content select Contact Mailing Address [ContactMailingAddress].
- Click the **Save** button.

Create the Contact Find Other Address button.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Buttons, Links, and Actions
- Click New Button or Link.
- In Label type Find Other Address.
- In Name type FindOtherAddress.
- In Display Type select Detail Page Button.
- In **Behavior** select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In Content select Contact Other Address [ContactOtherAddress].
- Click the **Save** button.

If you have Salesforce.com Professional Edition or higher, create Find Address buttons for Orders and Contracts.

Create the Order Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Orders > Buttons and Links
- Click New Button or Link.
- In Label type Find Billing Address.
- In Name type FindBillingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In **Content select** Order Billing Address [OrderBillingAddress].
- Click the Save button.

Create the Order Find Shipping Address button.

- In Salesforce.com, navigate to Setup > Customize > Orders > Buttons and Links
- Click New Button or Link.
- In Label type Find Shipping Address.
- In Name type FindShippingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In **Content select** Order Shipping Address [OrderShippingAddress].
- Click the **Save** button.

Create the Contract Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Contracts > Buttons and Links
- Click New Button or Link.
- In Label type Find Billing Address.
- In Name type FindBillingAddress.
- In Display Type select Detail Page Button.
- In Behavior select Display in existing window with sidebar..
- In Content Source select Visualforce Page.
- In **Content select** Contract Billing Address [ContractBillingAddress].
- Click the Save button.

Appendix B – Uninstalling the components manually

B1 Delete the Find Address buttons

Delete the Lead Find Address button.

- In Salesforce.com, navigate to Setup > Customize > Leads > Buttons, Links, and Actions
- In the table of Buttons, Links, and Actions, locate the row that has a Name of FindAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Account Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons, Links, and Actions
- In the table of Buttons, Links, and Actions, locate the row that has a **Name** of FindBillingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Account Find Shipping Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons, Links, and Actions
- In the table of Buttons, Links, and Actions, locate the row that has a **Name** of FindShippingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Contact Find Mailing Address button.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Buttons, Links, and Actions
- In the table of Buttons, Links, and Actions, locate the row that has a **Name** of FindMailingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Contact Find Other Address button.

- In Salesforce.com, navigate to Setup > Customize > Contacts > Buttons, Links, and Actions
- In the table of Buttons, Links, and Actions, locate the row that has a **Name** of FindOtherAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

If you have Salesforce.com Professional Edition or higher, delete the Find Address buttons from Orders and Contracts.

Delete the Order Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons and Links
- In the table of Custom Links, locate the row that has a Name of FindBillingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Order Find Shipping Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons and Links
- In the table of Custom Links, locate the row that has a Name of FindShippingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Contract Find Billing Address button.

- In Salesforce.com, navigate to Setup > Customize > Accounts > Buttons and Links
- In the table of Custom Links, locate the row that has a Name of FindBillingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

B2 Delete the Visualforce Pages

In Salesforce.com, navigate to **Setup > Develop > Pages**.

Delete the Lead Address page.

- In the table of Visualforce Pages, locate the row that has a Name of LeadAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Account Billing Address page.

- In the table of Visualforce Pages, locate the row that has a Name of AccountBillingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Account Shipping Address page.

- In the table of Visualforce Pages, locate the row that has a **Name** of AccountShippingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Contact Mailing Address page.

- In the table of Visualforce Pages, locate the row that has a Name of ContactMailingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Contact Other Address page.

- In the table of Visualforce Pages, locate the row that has a Name of ContactOtherAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Configuration page.

- In the table of Visualforce Pages, locate the row that has a Name of hpw_config.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

If you have Salesforce.com Professional Edition or higher, delete the Visualforce pages for Orders and Contracts.

Delete the Order Billing Address page.

- In the table of Visualforce Pages, locate the row that has a Name of OrderBillingAddress.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the Order Shipping Address page.

- In the table of Visualforce Pages, locate the row that has a Name of OrderShippingAddress.
- In that row, under Action click Del.
- Click **OK** to confirm.

Delete the Contract Billing Address page.

- In the table of Visualforce Pages, locate the row that has a Name of ContractBillingAddress.
- In that row, under Action click Del.
- Click **OK** to confirm.

B3 Delete the Static Resources

In Salesforce.com, navigate to **Setup** > **Develop** > **Static Resources**.

Delete the **Atlas** zipped resource.

- In the table of Static Resources, locate the row that has a Name of Atlas.
- In that row, under **Action** click **Del**.
- Click **OK** to confirm.

Delete the **hpwConfig_xml** text resource.

- In the table of Static Resources, locate the row that has a Name of hpwConfig xml.
- In that row, under Action click Del.
- Click **OK** to confirm.

Appendix C – Accessing components in Lightning mode

Salesforce.com components and page layouts are accessed through OBJECT MANAGER when you run Salesforce.com in Lightning mode. The OBJECT MANAGER can be accessed through the setup menu.

To display the setup navigation panel, please click on the "Setup" icon on the top right hand corner of the Salesforce.com browser window.



You can then use Quick Find search box to find the various entity page layout objects or follow the steps described in this appendix section to access the relevant objects.

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An example of the Setup menu in Lightning mode is shown below:

To access the Object Manager menu, navigate to "Setup > Objects and Fields > Object Manager" from the side panel or click on the "Object Manager" tab at the top of the setup menu.

ΤI	ne screenshot belov	w is an illustration	of the Object	Manager menu	ı screen witl	h items that	are sorted
by	/ their label names.		-	-			

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46 Items, Sorted by LABEL Account	API NAME Account Activity	DESCRIPTION		LAST MODIFIED	DEPLOYED	CUSTOM
46 Items, Sorted by LABEL Account Activity Asset	API NAME Account Activity Asset	DESCRIPTION		LAST MODIFIED	DEPLOYED	CUSTOM
ABEL Account Activity Asset Relationship	API NAME Account Accivity Asset AssetRelationship	DESCRIPTION		LAST MODIFIED	DEPLOYED	CUSTOM
46 Items, Sorted by LABEL Account Activity Asset Asset Relationship Authorization Form	API NAME Account Activity Asset AssetRelationship AuthorizationForm	DESCRIPTION		LAST MODIFIED	DEPLOYED	CUSTOM

Click on one of the entities listed under the "LABEL" column in the Object Manager menu screen to reveal further object components associated with the selected object.

For example, the account page layout screen below lists 4 layouts that are associated with the **Account** entity when the **Page Layouts** object is selected.

Page Layouts 4 Items, Sorted by Page Layout Name	Q. Quick Find	New Page L	ayout Assignment
PAGE LAYOUT NAME CREATED BY	MODIFIE	D BY	
Account (Marketing) Layout			
Account (Sales) Layout			
Account (Support) Layout			
Account Layout			
	_		Edit
The "action" common right for the corres "Delete" options a	mands are hidden in the arrow-dow sponding page layout definitions. Th are displayed when clicked.	n buttons on the he "Edit" and	Delete
	Page Layouts 4 Items, Sorted by Page Layout Name PAGE LAYOUT NAME CREATED BY Account (Marketing) Layout Account (Sales) Layout Account (Support) Layout Account Layout The "action" comm right for the corres "Delete" options a	Page Layouts Q. Quick Find 4 Items, Sorted by Page Layout Name Q. Quick Find PAGE LAYOUT NAME CREATED BY MODIFIE Account (Marketing) Layout Account (Sales) Layout Account (Support) Layout Account (Support) Layout The "action" commands are hidden in the arrow-dow right for the corresponding page layout definitions. The "belete" options are displayed when clicked.	Page Layouts Q. Quick Find New Page Layout 4 Items, Sorted by Page Layout Name PAGE LAYOUT NAME • CREATED BY MODIFIED BY Account (Marketing) Layout

You can then click on one of the listed layouts to display and edit the page layout detail*.

*Note: The **Action** column on the page layout screens as seen in Classic mode is not present in Lightning mode. Instead, you can click on the specific PAGE LAYOUT NAME or use the arrow-down button on the right to edit or delete the appropriate layout details.

Administration Manual

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Page Layouts	Quick Actions	Change Owner	Company Hierarchy	Find Shipping Add	Printable View	View Account iner	
	Expanded Lookups	Change Record Type	Delete	Get Contacts	Prospecting Insights	View Partner Scor	1
Lightning Record Pages	Related Lists						- 1
Buttons, Links, and Actions							_
	Actions in this section are pre-	defined by Salesforce. You	a can override the predefir	ned actions to set a customi	zed list of actions on Lig	htning Experience and mobile	
Compact Layouts	app pages that use this layout	. If you customize the actic	ons in the Quick Actions in	the Salesforce Classic Pub	lisher section, and have	saved the layout, then this	
Field Cots	section inherits that set of act	ions by default when you (click to override.				
Field Sets							
Object Limits	Account Detail	Sta	ndard Buttons				
		Edi	t Change Owner Char	nge Record Type Delete	View Account Hierarch	Sharing	
Record Types		Inc	lude Offline Get Survey	Invitation Check for New	Data View Partner Se	corecard	
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Triggers	* Account Name	Saube lext		110116	A second seco		
Triggers	Account Name Parent Account	Sample Text		Fax	1-415-555-1212		

When the layout detail screen is displayed, you can drag and drop the relevant components to the "custom" area onto the entity details section.

For example, assuming that you have dragged and dropped the "Find Billing Address" and "Find Shipping Address" buttons onto the "Custom Buttons" area in the Account Detail and saved the account page layout screen, the two custom buttons will be available in the "arrow-down" button on the top right corner of the account screen. This is illustrated below:

		All 💌	Q	Search Accounts a	ind more	*	- 🖬 ? 🌣 🐥 🐻
Sales	Home Oppo	ortunities 🗸	Leads	✓ Tasks ✓	Files 🗸 Accounts 🗸 Conta	cts 🗸 Campaigns 🗸 I	More 🔻 🏑
Account acctAdo	ledInLightn	ing 🔺		- ZPSZAS		+ Follow Edit New (Contact New Case
Type Prospect	Phone 016192428	00	Website	Accoun	t Owner Account	Site Industry	New Opportunity
1-2- X (M) -3-2-2	5 - IK - 20 - 60			a se para			Change Owner
Related	Details	News				Activity Chatte	er Delete
Account Owner				Rating	Click this arrow-down action menu to display other hidden actions. For example,	New Task New Event	View Account Hierarchy Check for New Data
Account Name acctAddedInLig	ghtning			Phone 01619242800	Address" can be used to capture and validate the Billing	Create a task	Printable View Find Billing Address
Parent Account				Fax	Address information from the Details section on this screen.		Find Shipping Address
Account Number LIG0001				Website		Filters: All time	Refresh Expand All
Billing Address				Shipping Address		Next Steps More	These two custom
179 Hale Road				Merlin Court	1		page layout screen.