HOPEWISER

Hopewiser Atlas
for Salesforce.com

User Guide

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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 which may not include the postal code. 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 Atlas for Salesforce.com.

1.2 Administration

Please see the separate Hopewiser Atlas for Salesforce.com Administration Manual for detailed administration instructions.

1.3 Overview

Hopewiser Atlas for Salesforce.com comprises a range of software components which access address data held on the Postal Address File (PAF) licensed from your postal service.

With Hopewiser Atlas for Salesforce.com, you have the ability to:

- Validate addresses
- Complete partial addresses
- Correct incorrect addresses
- Enter addresses using just the postal code and premise
- Find all addresses with a given postal code
- Search for streets
- Search for localities
- Search for premises
- Search for postal codes

2 Finding an Address

To find an address, click the **Find Address** button in the following Salesforce.com entities:
- Leads (**Find Address**)
- Accounts (**Find Billing Address** and **Find Shipping Address**)
- Contacts (**Find Mailing Address** and **Find Other Address**)

and, if you have Salesforce.com Professional Edition or higher:
- Orders (**Find Billing Address** and **Find Shipping Address**)
- Contracts (**Find Billing Address**)

If any of the entity's **Street**, **City**, **State/Province** or **ZIP/Postal Code** fields contains information when you click the **Find Address** button, that information will automatically be read and a search performed.

3 The Main Window

The **Address** box is where you enter the address information.

The **Search** button performs a search for addresses that match the information provided in the **Address** box.

The **Clear** button clears the Address box and any previous results.

The **Status** area shows the number of possible matches found or any error information.

The **Possible Matches** list shows entries from the PAF that match the given criteria. If this list contains complete addresses, the selected address will be displayed in the **Completed Address** boxes.

The **Next** button will be enabled if another search is required to match an address. This button performs a search for addresses that match the information in the selected item of the **Possible Matches** list.

The **Back** button takes you back to the previous step.

The **Completed Address** tab displays the final matched address.

The **Save** button will be enabled if at least one matching complete address has been found. This button populates the Salesforce.com entity with the address shown in the **Completed Address** boxes and closes the window.

The **Cancel** button closes the window without making any change to the Salesforce.com entity's address.

4 Address Matching

Hopewiser Atlas for Salesforce.com provides both Rapid Addressing and Partial Addressing. Rapid Addressing is a postal code-driven search whereas Partial Addressing uses all of the supplied address details (with or without a postal code) to search for an address.

4.1 Rapid Addressing

Rapid Addressing can be used in two modes.

When you type a postal code only on a single line in the **Address** box and click **Search**, all premises with that postal code will be listed in the **Possible Matches**. You can then select the item that you want from the list.

When you type a postal code and a premise number or name, separated by a comma, on a single line in the **Address** box and click **Search**, the full address of that premise will be shown in the **Completed Address** boxes. If the specified premise is not found, all premises matching the given postal code will be listed.

4.2 Partial Addressing

Partial Addressing requires the following elements of an address to be present for a match to be possible:
- Premise number or premise name
- Thoroughfare
- Post Town (or accurate Postal Code)

The Post Town may be replaced by a District that is unique to the town.

Some addresses, particularly in rural areas, do not include a thoroughfare and consist only of the following:
- House Name
- Locality/District
- Post Town
- Postal Code

In these cases, the House Name and locality alone may be sufficient to provide a match, provided that the Locality is unique to the Post Town.

Some District names may be duplicated and in such cases the Post Town, and sometimes the County too, will be required to identify the District. Similarly, Post Town names may be duplicated and the County or Postal Code will be required to identify the Post Town.

5 Address Searching

Hopewiser Atlas for Salesforce.com also acts as a gazetteer. If an address cannot be identified, it will list premises, streets or localities (districts or towns) that match the information entered.

For example, Newport is notable for being the name of several towns and districts in the UK. If you type **Newport** in the **Address** box and click **Search**, all towns and districts named Newport will be listed in **Possible Matches**. You can then select an item from the **Possible Matches** and click **Next** to perform another search based on the selected item.

If the possible match that you selected is a town, the next search will list districts and streets within the town. If the possible match that you selected is a district, the next search will list streets or premises within that district. In this way, you can selectively refine your search until you find the address you require.

5.1 Wildcard Searches

Searches can include the wildcard characters '?', which matches any single character, and '*', which matches any sequence of characters.

For example, if you type **Newport*** in the **Address** box and click **Search**, all towns and districts beginning with Newport will be listed. If you type **S????port** in the **Address** box and click **Search**, the results will include Stockport and Southport.