

## I've got custom address fields, how do I enable functionality for them?

This guide will cover:

- ✓ Standardize and Validate additional fields
- ✓ Enable pick-list for additional fields
- ✓ Enable standardization, validation and pick-list for additional objects (e.g. opportunities)

*Note: Functionality for custom fields is only available for AddressTools Premium, if you are using AddressTools Free then you can trial our AddressTools Premium application to take advantage of this feature plus many more that it includes.*

View our AppExchange listing for AddressTools here: [www.tiny.cc/addresses](http://www.tiny.cc/addresses)

### Standardize and Validate additional fields

If you have additional Country fields within one of the supported objects (Leads, Accounts, Contacts and Contracts) then you can enable functionality for this field, ensuring validation and standardization. If your custom field is not in one of these objects – e.g. opportunities then you will still need to follow these steps but there is also an additional step at the end that needs to be completed.

The below screenshot shows an additional country field added to the new lead form. Currently the field does not auto-populate with a pick-list and the field is not validated or standardized.

Here is the additionally country field, we will now add the validation and standardization functionalities to it.



1. Visit the **ProvenWorks Data Tools** page and then navigate to the **Settings** tab.

**Standardization and Validation Settings**

Validation Enabled  
 Standardization Enabled

Enable Account trigger     Enable Contract trigger  
 Enable Contact trigger     Enable Lead trigger

Run the AddressTools trigger to validate / standardize objects only once (useful if you have multiple triggers on validated objects)  
 Only standardize and validate when either Country, State or Zip is changed (existing invalid values will not cause an error)

Enable QuickComplete Country  
 Enable ZIP Codes Lookup

Store country value as:

Batch Address Validation alert email address:

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**Fields to Validate / Standardize**

Action	Object	Country Field	State Field	Address Status Field	Country Mandatory	Only Listed Countries	Standardize
<a href="#">Edit</a>   <a href="#">Del</a>	Account	BillingCountry	BillingState	pw_ccpro__BillingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Account	Mailing_Country__c	Mailing_State__c		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Account	PersonMailingCountry	PersonMailingState	pw_ccpro__MailingAddressStatus__pc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Account	PersonOtherCountry	PersonOtherState	pw_ccpro__OtherAddressStatus__pc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Account	ShippingCountry	ShippingState	pw_ccpro__ShippingAddressStatus__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	MailingCountry	MailingState	pw_ccpro__MailingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	OtherCountry	OtherState	pw_ccpro__OtherAddressStatus__c	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Contract	BillingCountry	BillingState	pw_ccpro__BillingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Country	State	pw_ccpro__AddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	site_field__c	CountRy__c			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Here you will see the standardization / validation section, select **Add** to include a new field to this.

**Edit field**

Select object and country field you want to validate on input.  
*Please note: Triggers are included within this package for Accounts, Contacts, Leads and Contracts. Please ensure you have the required code.*

Object:

Country Field:

State Field:

City Field:

Street Field:

ZIP Code Field:

Country Lookup:

State Lookup: Choose a state field

Zip Code Lookup: Choose a Zip code field

Address Status Field:

Country Mandatory:

Only Listed Countries:

Standardize:

Support street-level Address Validation:

3. Use the pick-lists to select the object and fields that you wish to apply the validation and standardization rules to.

Additionally you can select the check boxes to make the country mandatory and also only allow listed countries, resulting in an error message being shown if the inputted value does not comply with the ISO 3166 standard.

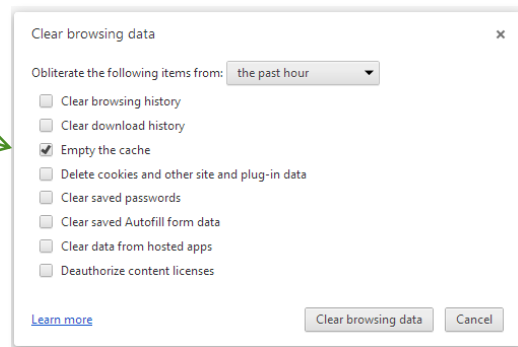
Select **Add** once you have finished

4. Within the **Fields to validate / standardize** section you should now see your custom field in the list, select **Save All** to ensure that your field will be saved.

Fields to Validate / Standardize							
Action	Object	Country Field	State Field	Address Status Field	Country Mandatory	Only Listed Countries	Standardize
<a href="#">Edit</a>   <a href="#">Del</a>	Account	BillingCountry	BillingState	pw_ccpro__BillingAddressStatus__c	✓	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Account	ShippingCountry	ShippingState	pw_ccpro__ShippingAddressStatus__c	☐	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	MailingCountry	MailingState	pw_ccpro__MailingAddressStatus__c	✓	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	OtherCountry	OtherState	pw_ccpro__OtherAddressStatus__c	☐	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Contract	BillingCountry	BillingState	pw_ccpro__BillingAddressStatus__c	✓	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Country	State	pw_ccpro__AddressStatus__c	✓	✓	✓
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Main_Country__c			✓	✓	✓

[Add](#)
[Reset to Defaults](#)
[Save All](#)
[Cancel](#)

5. Ensure that you clear your browsers cache [Ctrl+Shift+Del] to enable the feature to correctly work.



[Save](#)
[Save & New](#)
[Cancel](#)

Error: Invalid Data.  
 Review all error messages below to correct your data.  
 'Main Working Country' contains an invalid country name

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Lead Owner: Your ID

First Name: --None--

Last Name:

Company:

Title:

Lead Currency:

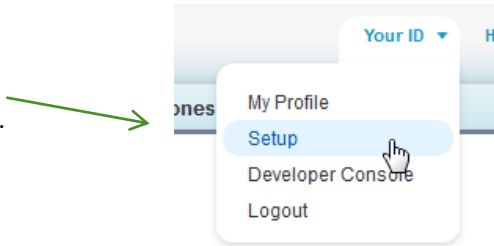
Main Working Country:  [United States](#)

This screenshot shows an incorrect country name being entered and an error message being shown when the user attempts to save the lead.

## Enable Pick-List for additional fields

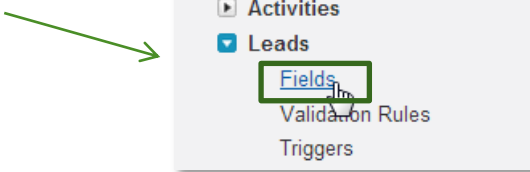
The following steps will show how to display a pick-list for your additional country or state fields, ensuring that the values are standardized and validated.

1. Visit the Salesforce **Setup** by selecting it from the pick-list underneath your Salesforce ID.



2. Navigate to the **App Setup** section and expand **Customize**, next select the object that your custom field is located – for example **Leads**.

Within this select **Fields**.



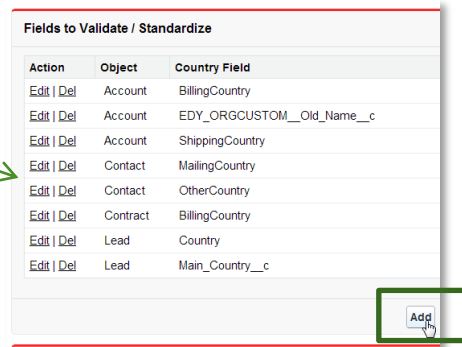
Lead Custom Fields & Relationships			
Action	Field Label	API Name	Installed Package
Edit   Replace	Address Status	pw_ccpro__AddressStatus__c	AddressTools
Edit	Correlation Data	SFGA__Correlation_Data__c	Salesforce for Google AdWords
Edit	CorrelationID	SFGA__CorrelationID__c	Salesforce for Google AdWords
Edit	Country Lookup	pw_ccpro__CountryLookup__c	AddressTools
Edit   Del	Main Working Country	Main_Country__c	
Edit	State Lookup	pw_ccpro__StateLookup__c	AddressTools
Edit	UTC Time Offset	pw_ccpro__UtcTimeOffset__c	AddressTools
Edit	Web Source	SFGA__Web_Source__c	Salesforce for Google AdWords
Edit	Zip/Postal Code Lookup	pw_ccpro__ZipCodeLookup__c	AddressTools

3. Locate the **Lead Custom Fields & Relationships** section and select **Edit** on your custom field.

- When you are on the edit page for the custom field, copy the field ID which can be found in the webpage URL. The 15 character ID after 'salesforce.com/' is the field ID. (00NM000000jVwn)

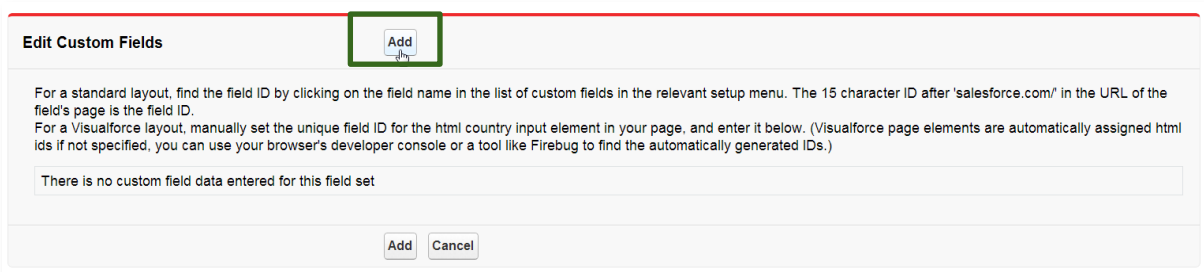
 https://cs7.salesforce.com/00NM000000jVwn/e?setupid=LeadFields&retURL=%2

- Navigate back to *ProvenWorks Administration* and select the *Settings* tab. Next within the *Fields to Validate / Standardize* section and select *Add*.



Action	Object	Country Field
<a href="#">Edit</a>   <a href="#">Del</a>	Account	BillingCountry
<a href="#">Edit</a>   <a href="#">Del</a>	Account	EDY_ORGCUSTOM__Old_Name__c
<a href="#">Edit</a>   <a href="#">Del</a>	Account	ShippingCountry
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	MailingCountry
<a href="#">Edit</a>   <a href="#">Del</a>	Contact	OtherCountry
<a href="#">Edit</a>   <a href="#">Del</a>	Contract	BillingCountry
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Country
<a href="#">Edit</a>   <a href="#">Del</a>	Lead	Main_Country__c

- Locate the *Edit Custom Fields* section and select *Add*.



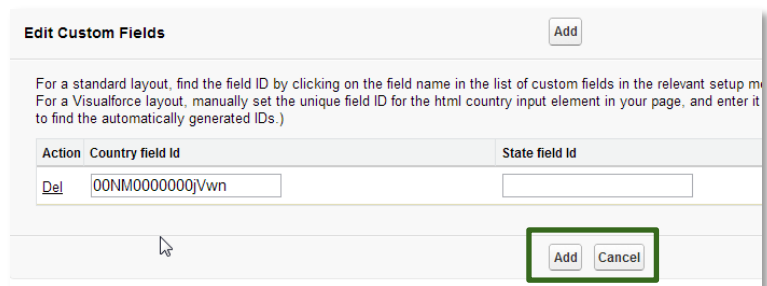
**Edit Custom Fields** [Add](#)

For a standard layout, find the field ID by clicking on the field name in the list of custom fields in the relevant setup menu. The 15 character ID after 'salesforce.com/' in the URL of the field's page is the field ID.  
For a Visualforce layout, manually set the unique field ID for the html country input element in your page, and enter it below. (Visualforce page elements are automatically assigned html ids if not specified, you can use your browser's developer console or a tool like Firebug to find the automatically generated IDs.)

There is no custom field data entered for this field set

[Add](#) [Cancel](#)

- Enter the field ID (Step 4) within the relevant text box, and then select *Add* at the bottom of the page.



**Edit Custom Fields** [Add](#)

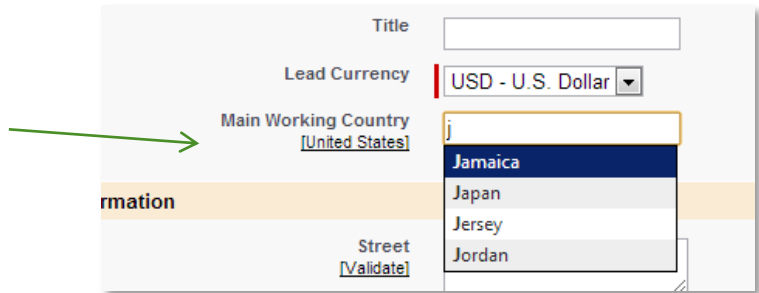
For a standard layout, find the field ID by clicking on the field name in the list of custom fields in the relevant setup menu. For a Visualforce layout, manually set the unique field ID for the html country input element in your page, and enter it to find the automatically generated IDs.)

Action	Country field Id	State field Id
<a href="#">Del</a>	<input type="text" value="00NM000000jVwn"/>	<input type="text"/>

[Add](#) [Cancel](#)

- You will now be taken back to the *Settings* page, ensure that you select *Save All* within the *Fields to Validate / Standardize* section and then clear your browsers cache [Ctrl+Shift+Del].

- Your custom field will now populate a country / state pick list once typing begins. It will also incorporate the QuickComplete feature.

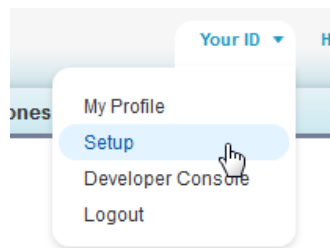


## Standardization, validation and pick-list for non-supported objects

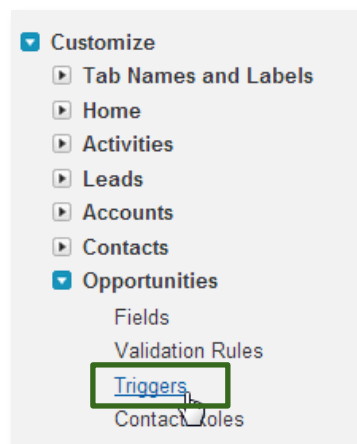
To enable validation, standardization and pick-list population for objects that are not automatically supported – for example opportunities a custom trigger needs to be added in the Salesforce setup for the object.

Ensure that you have completed all the above steps and added the selected field to the “Fields to validation / standardize” section, once you have completed this follow the steps below to add a customer trigger to your desired object.

- Visit the Salesforce **Setup** by selecting it from the pick-list underneath your Salesforce ID.



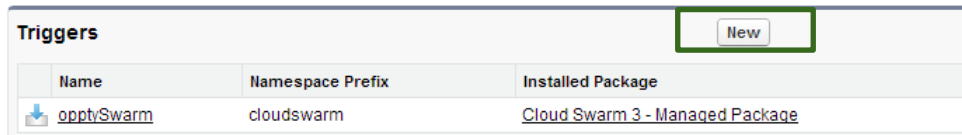
- Within the **App Setup** section expand **Customize** and then the object that you wish to setup the features for – here we are showing **Opportunities**. Within the object select **Triggers**.



2. On the trigger page for the desired object select **New**.

## Opportunity Triggers

Define the Apex triggers for Opportunities here.



Triggers		
Name	Namespace Prefix	Installed Package
<a href="#">opptySwarm</a>	cloudswarm	<a href="#">Cloud Swarm 3 - Managed Package</a>

3. You will see a text area for code input, the below code shown an example of a trigger that will need to be modified for your desired object.

```
trigger ValidateOpportunityCountryFields on Opportunity (before insert, before update) {
    pw_ccpro.CountryValidator2.Validate(Trigger.new, Trigger.oldMap);
}
```

4. The highlighted sections need to be modified depending on your object, simply remove the current value and type your desired object.

6. Your code should look like this example, select **Save** and then clear your browsers cache.



7. The desired field on your object will now display a pick-list ensuring a correct, standardized and validated value.

## Not Working?

If the features are not working for your custom field then check you have completed the follow list correctly:

- Added the custom field to the “Fields to Validate / Standardize” section within AddressTools administration
- Entered the field ID to the “Custom Fields” within AddressTools administration and correctly saved
- Correctly modified the trigger for your selected object and added it to the “Triggers” section
- Cleared your browsers cache

## Contact Us

If the custom fields are still not working for you, please check out our other troubleshooting guides as these may provide the answer.

Alternatively contact us at: [support@provenworks.com](mailto:support@provenworks.com)

We will be happy to answer and questions or problems that you may have.