

ADDRESSTOOLS PREMIUM CLASSIC INSTALLATION GUIDE

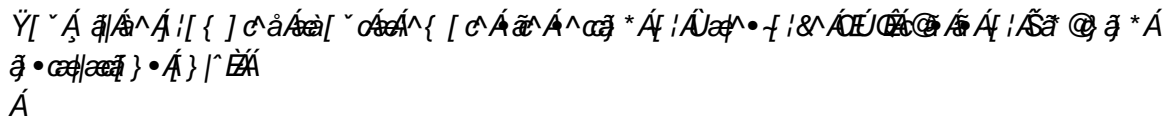
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This guide assumes that you have successfully installed AddressTools Premium from the Salesforce.com AppExchange.

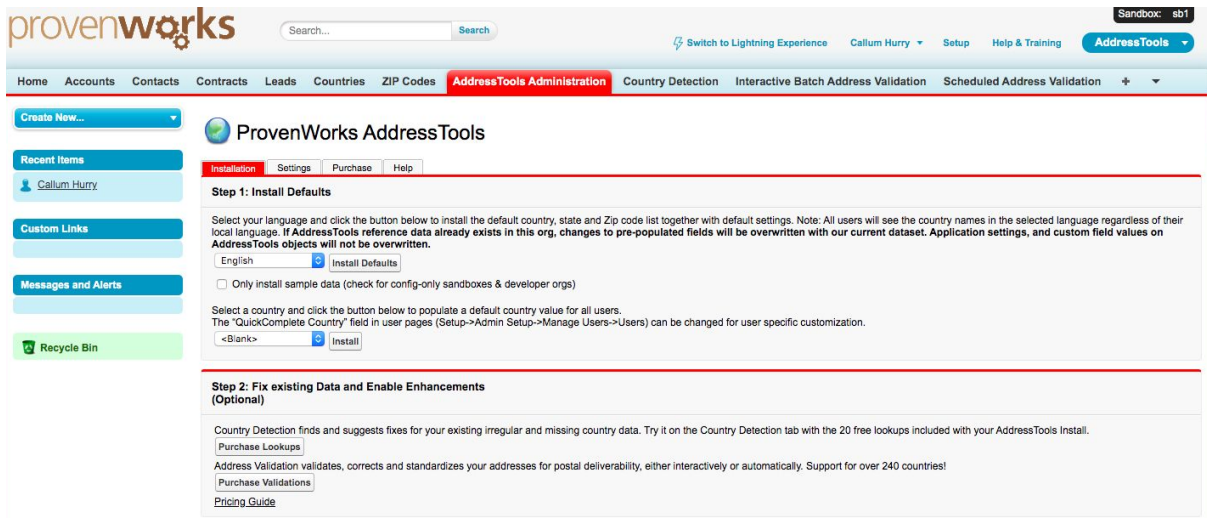
Want to skip the guide and see the tool in action? [Book a demo!](#)

INSTALLATION

Go to the **AddressTools Administration** tab.

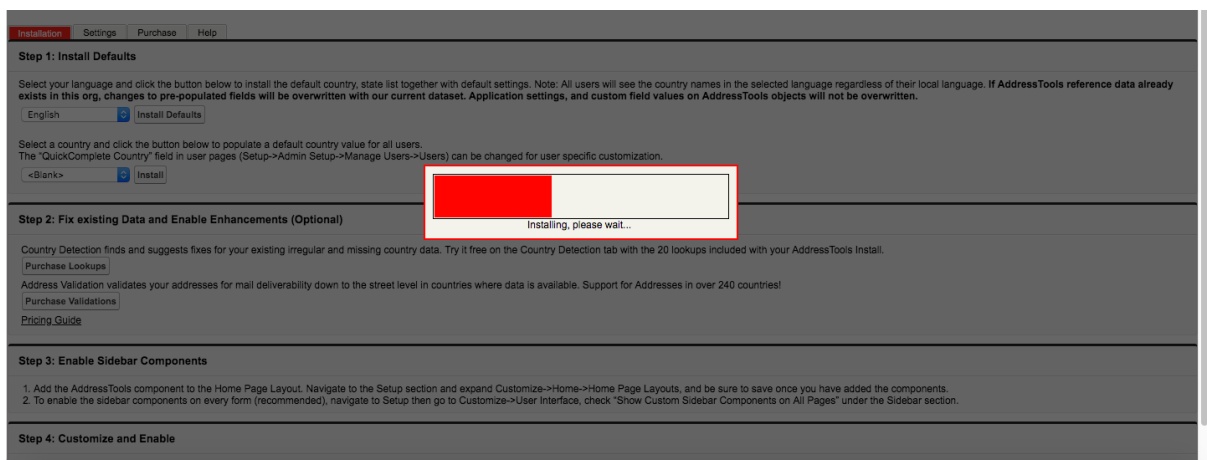


If you will be using **Address Validation via Process Builder**, select **Create Auth Token**.



Under **Install Defaults**, choose a **Language** from the first select list.

Select **Install Defaults**.



Select **OK**.

CONFIGURE LOOKUPS

Go to **AddressTools Administration** tab.

Select **Settings**.

Select **Settings**.

Navigate to **Fields to Validate/Standardize**.

Select **Create Lookups** per each block you want to create lookup fields for.

Fields to Validate / Standardize							
Action	Object	Record Type	Country Field	State Field	Address Status Field	Country Mandatory	Only Listed Countries
Edit Del Create Lookups	Account		BillingCountry	BillingState	pw_ccpro_BillingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Account		PersonMailingCountry	PersonMailingState	pw_ccpro_MailingAddressStatus__pc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Account		PersonOtherCountry	PersonOtherState	pw_ccpro_OtherAddressStatus__pc	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Account		ShippingCountry	ShippingState	pw_ccpro_ShippingAddressStatus__c	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Contact		MailingCountry	MailingState	pw_ccpro_MailingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Contact		OtherCountry	OtherState	pw_ccpro_OtherAddressStatus__c	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Contract		BillingCountry	BillingState	pw_ccpro_BillingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Contract		ShippingCountry	ShippingState	pw_ccpro_ShippingAddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	Lead		Country	State	pw_ccpro_AddressStatus__c	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Edit Del Create Lookups	npsp__address__c		npsp__MailingCountry__c	npsp__MailingState__c		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select **OK** to proceed.

You will now be required to configure the **Field-Level Security** to access the generated fields. There are a number of ways to configure field-level security, the following will just show one of these.

Go to **Setup | Create | [Object] | Fields**.

Select newly generated **[Address Block Name] Country Lookup**.

Select **Set Field-Level Security**.

Check **Visible** for each profile that will be using the tool.

Set Field-Level Security
Billing Country Lookup

[Help for this Page](#)

Save Cancel

Field Label	Billing Country Lookup
Data Type	Lookup(Country)

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input type="checkbox"/> Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Only User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Company Communities User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CUSTOM COMMUNITY	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Partner Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Solution Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard Platform User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Standard User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select **Save**.

Repeat the above steps for each of the generated lookup fields, **[Address Block Name] State Lookup** and **[Address Block Name] ZIP Lookup**.

ENABLE DATA VALIDATION

Go to the **AddressTools Administration** tab.

Select **Settings**.

Check **Validation Enabled**.

Select **Save All**.

ProvenWorks AddressTools

Installation **Settings** Purchase Help

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:

On the **Settings** page, navigate to **Country Specific Settings**.

Configure the **Dueling Picklists** to your requirements.

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Select **Save All**.

Country Specific Settings

<p>Displayed Countries</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia 	<p>Hidden Countries</p> <ul style="list-style-type: none"> Iran, Islamic Republic of Korea, Democratic People's Repu Myanmar Sudan Zimbabwe 	<p>Allow Only Listed States</p> <ul style="list-style-type: none"> United States 	<p>Allow Any State Value</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia
<p>State Is Mandatory</p> <ul style="list-style-type: none"> United States 	<p>State Is Not Mandatory</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia 	<p>City Is Mandatory</p>	<p>City Is Not Mandatory</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia
<p>Street Line 1 Is Mandatory</p>	<p>Street Line 1 Is Not Mandatory</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia 	<p>Street Line 2 Is Mandatory</p>	<p>Street Line 2 Is Not Mandatory</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia
<p>Validate ZIP Code Pattern</p>	<p>Allow Any ZIP Code value</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia 	<p>ZIP Code Is Mandatory</p>	<p>ZIP Code Is Not Mandatory</p> <ul style="list-style-type: none"> Afghanistan Albania Algeria American Samoa Andorra Angola Anguilla Antarctica Antigua and Barbuda Argentina Armenia

On the **Settings** page, navigate to **Fields to Validate/Standardize**.

Select **Edit** next to the address block you want to modify.

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Navigate to **Global Settings & Country Specific Settings**.

Data Validation covers the following settings: Country Mandatory, Enable City and State Validation Against US ZIP Code, Allow Only Listed Countries, Allow Only Listed ZIP Codes, Street 1 Mandatory, Street 2 Mandatory, City Mandatory, State Mandatory, ZIP Code Mandatory, Allow Only Listed States and Validate Postal Code Against Regex.

Configure the **Checkboxes** to your data validation requirements.

Global Settings		
<input checked="" type="checkbox"/> Country Mandatory	<input type="checkbox"/> Standardize Country	<input checked="" type="checkbox"/> Allow Only Listed Countries
<input type="checkbox"/> Standardize State	<input checked="" type="checkbox"/> Enable City and State Validation Against US ZIP Code	<input checked="" type="checkbox"/> Allow Only Listed ZIP Codes
Country-Specific Settings		
<input checked="" type="checkbox"/> Street 1 Mandatory	<input checked="" type="checkbox"/> State Mandatory	<input checked="" type="checkbox"/> Allow Only Listed States
<input checked="" type="checkbox"/> Street 2 Mandatory	<input checked="" type="checkbox"/> ZIP Code Mandatory	<input checked="" type="checkbox"/> Validate Postal Code Against Regex
<input checked="" type="checkbox"/> City Mandatory		

Select **Save**.

Repeat the above steps for each address block in the Fields to Validate/Standardize section to alter the configuration.

ENABLE COUNTRY STANDARDIZATION

Go to the **AddressTools Administration** tab.

Select **Settings**.

Check **Standardization Enabled**.

Choose **Store country value as** from **Name**, **ISO 2-Letter code**, **ISO 3-Letter code**, **Native name (local characters)**, **Native name (Latin characters)**.

Select **Save All**.

On the **Settings** page, navigate to **Fields to Validate/Standardize**.

Select **Edit** next to the address block you want to modify.

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Navigate to **Global Settings**.

Check **Standardize Country**.

Select **Save**.

Repeat the above steps for each address block in the Fields to Validate/Standardize section to alter the configuration.

ENABLE STATE STANDARDIZATION

Go to the **AddressTools Administration** tab.

Select **Settings**.

Check **Standardization Enabled**.

Select **Save All**.

On the **Settings** page, navigate to **Fields to Validate/Standardize**.

Select **Edit** next to the address block you want to modify.

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Navigate to **Global Settings**.

Check **Standardize State**.

Select **Save**.

States can be standardized to their **Two Code Standard** or **Full Name**.

To toggle between the two, go to the **Countries** tab.

Choose **All**.

Select **Go**.



Contracts Leads **Countries** ZIP Codes AddressTools Administration Country Detection

Countries
Home

View: All [Edit | Create New View](#)

Select **Edit** next to the country record.

Check **Use Subcountry Code in State field**.

Select **Save**.

Country Edit

Information
! = Required Information

<p>Country Name <input style="width: 80%;" type="text" value="United States"/></p> <p>ISO 3166-2 Code <input style="width: 80%;" type="text" value="US"/></p> <p>Continent <input style="width: 80%;" type="text" value="North America"/></p> <p>Time Zone <input style="width: 80%;" type="text"/> </p> <p>Phone Code <input style="width: 80%;" type="text" value="1"/></p> <p>Is Obsolete <input type="checkbox"/></p> <p>Geolocation (Latitude) <input style="width: 80%;" type="text" value="39.759998"/></p> <p>Geolocation (Longitude) <input style="width: 80%;" type="text" value="-98.500000"/></p>	<p>ISO 3166-3 Code <input style="width: 80%;" type="text" value="USA"/></p> <p>ZIP Code is mandatory <input type="checkbox"/></p> <p>ZIP Code Regular Expression <input style="width: 100%; height: 40px;" type="text" value="^\d{5}(-\d{4})?\$"/></p> <p>Validate ZIP Code <input type="checkbox"/></p> <p>ZIP Code pattern fail message <input style="width: 80%;" type="text"/></p>
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Preferences

<p>Visible <input checked="" type="checkbox"/></p>	<p>State is Mandatory <input type="checkbox"/></p> <p>Use Subcountry Code in State field <input checked="" type="checkbox"/></p> <p>Allow only listed States <input type="checkbox"/></p>
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Repeat for each country you want this configured for.

PREMISE LEVEL ADDRESS VALIDATION

Credits can be purchased to verify address data in your Salesforce Organization. [Book a demo](#) with our team for more information. 25 address lookups are included with your trial.

The validation can be configured for interactive use or via an automated process using Salesforce Process builder.

To configure an address block for verification, go to the **AddressTools Administration** tab.

Select **Settings**.

Navigate to **Fields to Validate/Standardize**.

Select **Edit** next to the address block you want to modify.

[Illegible text]

Check **Support Premise-Level Address Validation**.

If your address data in Salesforce is always in the correct fields, enabled **City and Postal Code Are Always in Correct Fields**. This will reduce the amount of ambiguous responses by providing a more defined query. If your address blocks contains data in incorrect address fields, this can result in **Not Matched** responses.

If you wish to split the Sub-Building responses in the street field, you can use **Force Street Address to Multi-Line** and choose **Sub-Builder Always on Line 1** or **Sub-Building Always on Line 2**.

Select **Save**.

Premise-Level Validation Options

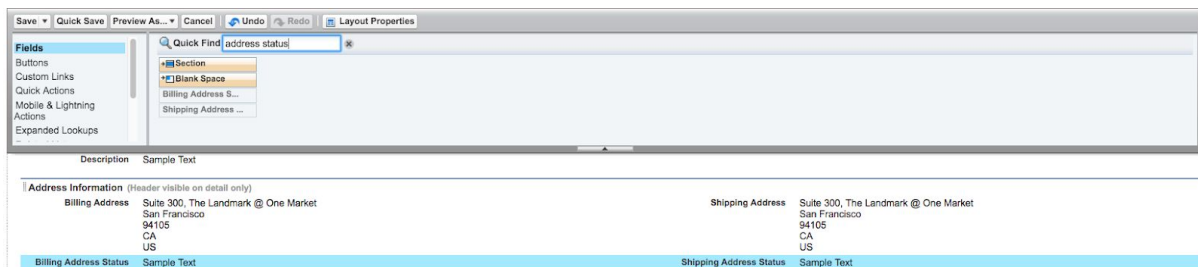
- Support Premise-Level Address Validation ?
- City and Postal Code Are Always in Correct Fields ?
- Force Street Address to Multi-Line ?
 - Sub-Building Always on Line 1
 - Sub-Building Always on Line 2

Go to **Setup | Create | [Object] | Page Layouts**.

Select **Edit** next to the page layout you want to support address verification on.

Select **Fields**.

Add the associated **Address Status** fields to the layout.



Optionally, you can also add the associated **County** field to the layout.

[The following text is a corrupted or garbled version of the previous paragraph and is not included in the final output.]

Select **Save**.

Repeat for any page layouts requiring functionality.

To configure a process to verify record's address when criterion is met, see our [Process Builder](#) guide.

ENABLE QUICKCOMPLETE COUNTRY

Go to the **AddressTools Administration** tab.

Select **Settings**.

Check **Enable QuickComplete Country**.

Select **Save All**.

ProvenWorks AddressTools

Installation
Settings
Purchase
Help

Standardization and Validation Settings

Validation Enabled

Standardization Enabled

Enable Account trigger

Enable Contract trigger

Enable Contact trigger

Enable Contract 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:

Select **Installation**.

Under **Install Defaults**, choose a **Country** from the second select list.

Select **Install**.

Installation
Settings
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Help

Step 1: Install Defaults

Select your language and click the button below to install the default country, state list together with default settings. Note: All users will see the country names in the selected language regardless of their local language. **If AddressTools reference data already exists in this org, changes to pre-populated fields will be overwritten with our current dataset. Application settings, and custom field values on AddressTools objects will not be overwritten.**

English

Install Defaults

Select a country and click the button below to populate a default country value for all users. The "QuickComplete Country" field in user pages (Setup->Admin Setup->Manage Users->Users) can be changed for user specific customization.

United States

Install

INTERACTIVE FUNCTIONALITY

Enhance the user experience in classic by providing users with interactive features such as ZIP Code lookup, country and state type-aheads, QuickComplete Country link and Interactive Premise-Level Address Verification.

To provide interactive functionality, in classic in there are two separate approaches available. Chrome Browser Addon or Visualforce.

See the appropriate guide below for your use case.

[Browser Addon guide](#)

[Visualforce guide](#)

ZIP CODE LOOKUP

Go to the **AddressTools Administration** tab.

Go to the **AddressTools Administration** tab.

Select **Settings**.

Check **Enable ZIP Codes Lookup**.

Select **Save All**.

The screenshot shows the 'ProvenWorks AddressTools' settings interface. At the top, there are tabs for 'Installation', 'Settings' (which is active), 'Purchase', and 'Help'. Below the tabs is the 'Standardization and Validation Settings' section. It contains several checkboxes: 'Validation Enabled' (unchecked), 'Standardization Enabled' (unchecked), 'Enable Account trigger' (checked), 'Enable Contract trigger' (checked), 'Enable Contact trigger' (checked), and 'Enable Lead trigger' (checked). There are also two unchecked checkboxes for running triggers only once and only when country, state, or zip is changed. At the bottom of the settings, there is a dropdown menu for 'Store country value as' set to 'Name', and a text input field for 'Batch Address Validation alert email address:'. At the bottom right, there are 'Save All' and 'Cancel' buttons.

Clear your **Browser's Cache**.

PERMISSIONS, ACCESS & LICENSE ASSIGNMENT

For users wanting to access AddressTools functionality, they will be required to have access to all of the following components in the package.

All user/profiles using the tool must have access to the following **Objects/Fields**:

Object Label	Fields
Users	QuickComplete Country
Countries	QuickComplete Country
States	QuickComplete Country
ZIP Codes	QuickComplete Country
Time Zones	QuickComplete Country
Alternate Country Names	QuickComplete Country
Alternate State Names	QuickComplete Country

The user/profile will need access to all **Apex Classes** with the prefix – "pw_ccpro__",

The user/profile will need access to **Visualforce Pages**:

pw_ccpro__CountriesJavaScript__c

pw_ccpro__SessionJavaScript__c

pw_ccpro__SessionIdPage__c

Licenses are allocated in **Setup | Installed Packages | Manage Licenses** next to AddressTools.

FAQ

Can I validate or verify my addresses against global postal authorities such as USPS, Canada Post or Royal Mail?

Yes, you can purchase lookup credits to verify your addresses against global postal authorities. Contact sales@provenworks.com for more details.

Do I need to use a Browser Addon or Visualforce page in Lightning for interactive functionality?

No, the lightning features of the solution take advantage of Lightning Components thus removing the requirements for Browser Addons and Visualforce pages. Visualforce pages can still be used for customized approaches. Want to set up AddressTools for Lightning, follow our setup guide [here](#).

Can I add my own country and state data or make changes to existing values?

Yes, AddressTools installs three custom objects into your organization, Countries, States and ZIP Codes. You can add countries to the country object, states as children to the entered countries, and then ZIP Codes as children to the American States. Edits can also be made to all the country, state and ZIP records to meet your requirements.

Can I see the current time or UTC offset for my records' addresses?

Yes, you can add a current time component to your page layouts which displays a current time of the address entry. You can also add a UTC offset field to the record which can be reported against. Find out more [here](#).

CONTACT US

If you require any further support or have any questions, check out www.provenworks.com/support and if you can't find what you're looking for, reach out to our team at support@provenworks.com. Alternatively, if you want to see the product in action, [book a demo!](#)