

User Manual for USAddrify product

Prepared by:

Congruent
Info-Tech

Type II/4, Dr. VSI Estate,
Thiruvannmiyur, Chennai – 600 041

Microsoft Partner
Gold Application Development
Collaboration and Content



registered
consulting partner

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Introduction:

USAddrify enables seamless U.S. address validation within Salesforce using the official USPS Address Validation API. This product helps users:

- Instantly validate and correct addresses directly from record pages.
- Ensure data accuracy for shipping and compliance.
- Optionally store invalid addresses without blocking business processes.
- Visualize validated address locations using an integrated map component.

USAddrify is fully Lightning-compatible and works across both standard and custom Salesforce objects.

Security Scan Justification (Third-Party API):

Our solution does not host or expose any external web application or API endpoints. The integration is outbound-only from Salesforce to the USPS API (<https://apis.usps.com>) over HTTPS. The USPS API is a third-party, government-managed service that is not owned or controlled by our organization. As a result, web application security scanning using tools such as OWASP ZAP or Burp Suite is not applicable for this endpoint. No inbound traffic from external systems is accepted by our solution.

API Architecture Explanation:

- **Salesforce → calls USPS API**
- **No inbound traffic from internet to your systems**
- **No middleware / Heroku / AWS / custom server involved**

Example: The integration is outbound-only from Salesforce to USPS APIs over HTTPS. No external endpoints are exposed by our solution.

Prerequisites

Before installing and configuring USAddrify, ensure the following items are ready:

Salesforce Requirements

- **Salesforce Admin Access**
 - Required to install packages, configure permission sets, update named credentials, and modify page layouts.
- **Lightning Experience Enabled**
 - The validation and map components operate in Lightning only.
- **API Access Enabled**
 - Necessary for Salesforce to connect to the USPS API via Named Credentials.

USPS Developer Account

- A USPS Developer (Business) Account is required to obtain a Consumer Key and Consumer Secret used for API authentication.

Create and Setup USPS Account:

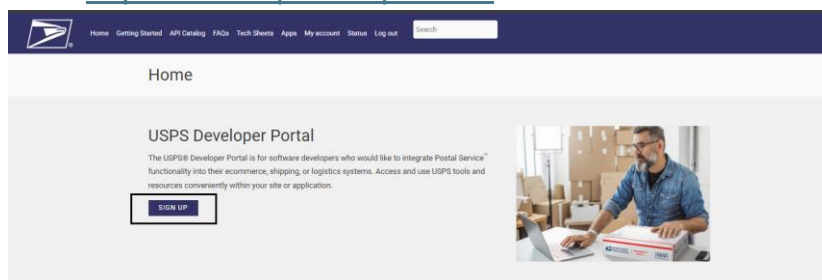
To perform U.S. address validations, you must create a USPS developer account and generate API credentials.

Step-by-Step Instructions

Step 1: Create a USPS Business Developer Account

Explanation: A developer account is mandatory to access USPS APIs.

- Visit: <https://developers.usps.com/>



- Click Sign Up.
- Select Business Account as the account type.



Create Your USPS.com Account

Select an Account Type

☐ **Personal Account**

Choose **personal** account if you are interested in services for your home? i.e. order stamps, renew a MailBox, mail a package, etc.

☒ **Business Account**

Interested in solutions for your **business** - home-based, small, medium, or large? Choose business account.

Continue

Step 2: Complete Account Information

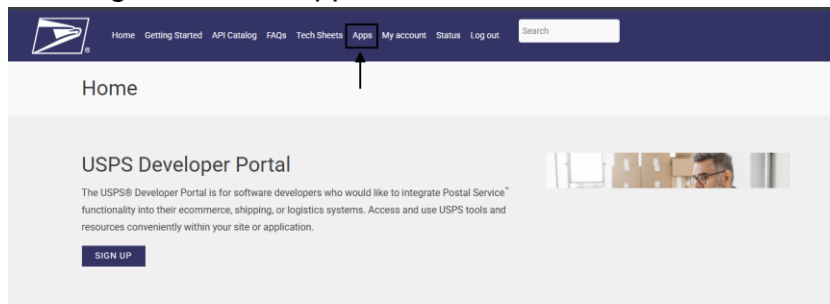
Explanation: USPS requires accurate company and contact information to activate API access.

- Fill in Company Information.
- Enter Contact Information.
- Complete Security Settings.
- Submit to finalize account creation.

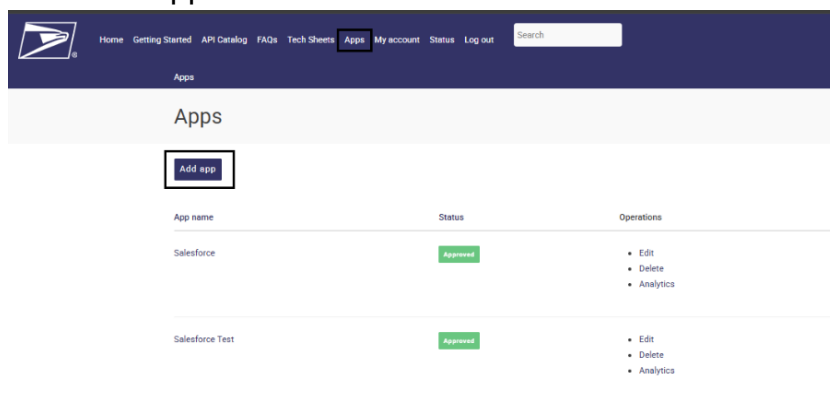
Step 3: Create an App to Generate API Keys

Explanation: An "App" in USPS generates your Consumer Key and Consumer Secret.

- After login, click the Apps tab.



- Click Add App.



In the app creation page:

- **App Name:** Enter Salesforce
- **Callback URL:** Provide your Salesforce org's callback URL.
- **Enable Public Access:** Check this box.

Add App

App name *

Salesforce 1

Machine name: salesforce_1

Edit

Callback URL

External site to which a consumer of this app is redirected to log in when using three-legged OAuth.

Description

APIs

☒ Public Access I

ADD APP

Step 4: Retrieve the Consumer Key & Consumer Secret

Explanation: These keys will be stored in Salesforce Named Credentials to authorize API calls.

- From the newly created app list, click the app link.
- Inside the details page, copy Consumer Key and Consumer Secret.

View Edit Delete Analytics

Details

App status

Approved

Callback URL

https://www.congruentsoft.com

Created

2 months ago

Last updated

2 months ago

Credentials

Add key

Consumer Key

Consumer Secret

Issued

Expires

Key Status

2 months ago

Never

Approved

Products

Public Access I

Revoke

Enabled

Keep these secured.

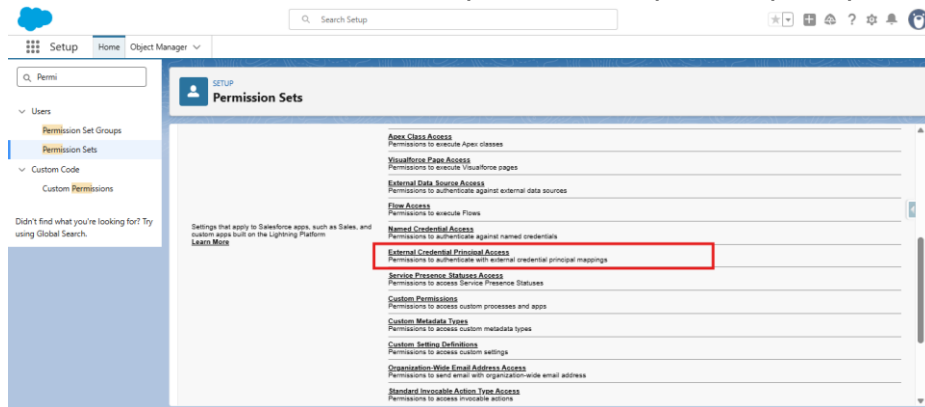
Package Post-Installation Steps

After installing USAddrify, complete the following configurations:

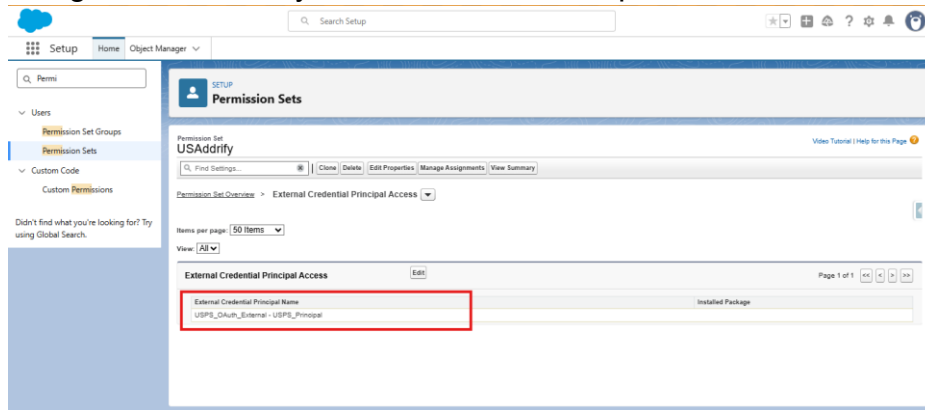
Step 1: Assign Permission Set & Configure External Credential Access

Explanation: Permission sets allow users to run validations and access USPS connections.

- Clone USAddrify Permission Set.
- Under External Credential Principal Access, open the principal.



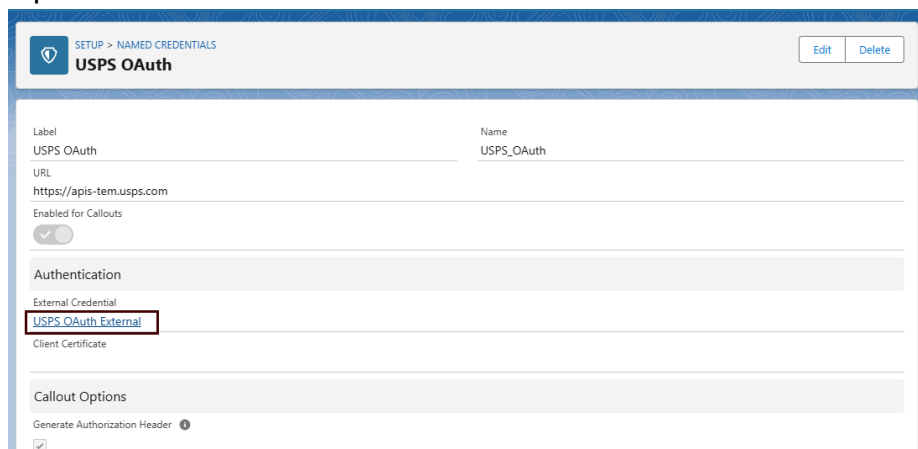
- Add: USPS_OAuth_External – USPS_Principal
- Assign the USAddrify Permission Set to required users.



Step 2: Update Consumer Key & Secret in Named Credential

Explanation: These credentials authenticate Salesforce API calls to USPS.

- Open Named Credentials → USPS OAuth

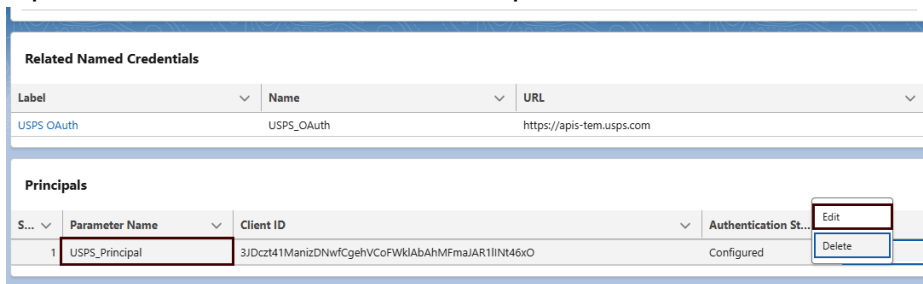


- Update Consumer Key and Consumer Secret.

Step 3: Update External Credential (Principal Section)

Explanation: The principal holds the authentication type and values.

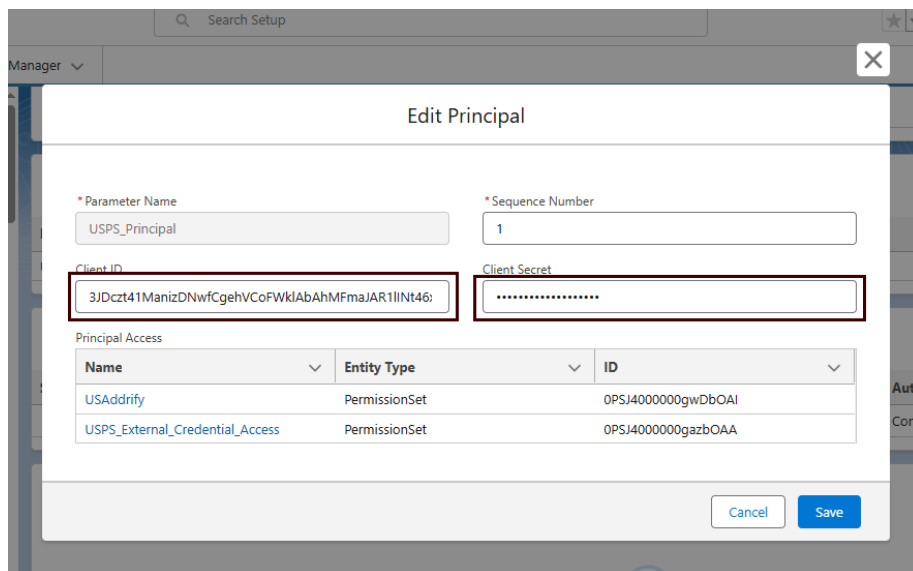
- Open External Credentials → Principal



Related Named Credentials			
Label	Name	URL	
USPS OAuth	USPS_OAuth	https://apis-tem.usps.com	

Principals			
S...	Parameter Name	Client ID	Authentication St...
1	USPS_Principal	3JDczt41ManizDNwfCgehVCoFWkAbAhMFmaJAR1lInT46xO	Configured

- Click Edit
- Add:
 - Client ID: Consumer Key
 - Client Secret: Consumer Secret



Edit Principal

Parameter Name

USPS_Principal

Sequence Number

1

Client ID

3JDczt41ManizDNwfCgehVCoFWkAbAhMFmaJAR1lInT46xO

Client Secret

.....

Principal Access

Name	Entity Type	ID
USAddrify	PermissionSet	OPSI4000000gwdBOAI
USPS_External_Credential_Access	PermissionSet	OPSI4000000gazbOAA

Cancel

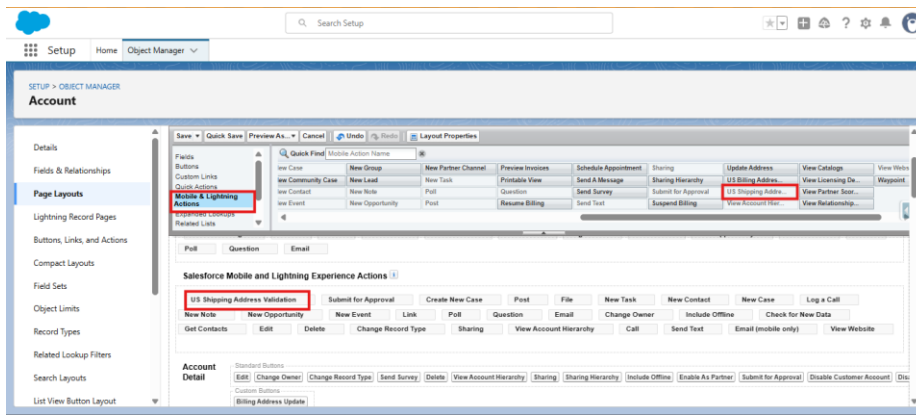
Save

- Save.

Step 4: Add Validation Button to the Account Page Layout

Explanation: The button initiates address validation from the record page.

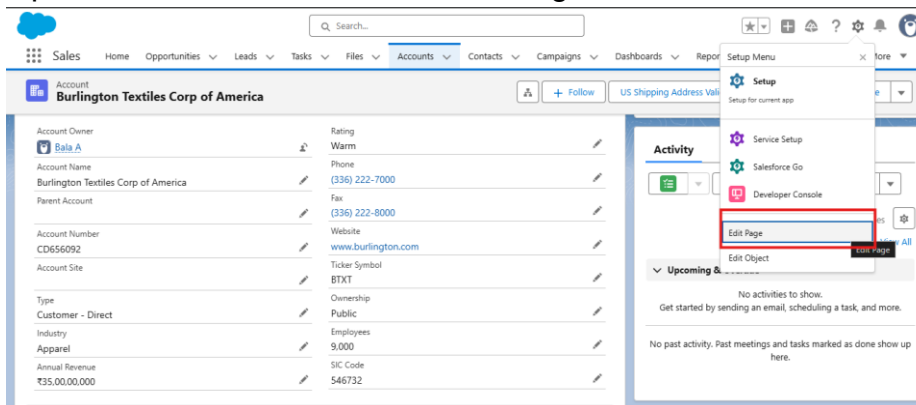
- Open Account Object → Page Layouts
- Under Mobile & Lightning Actions, drag US Shipping Address Validation into the layout.



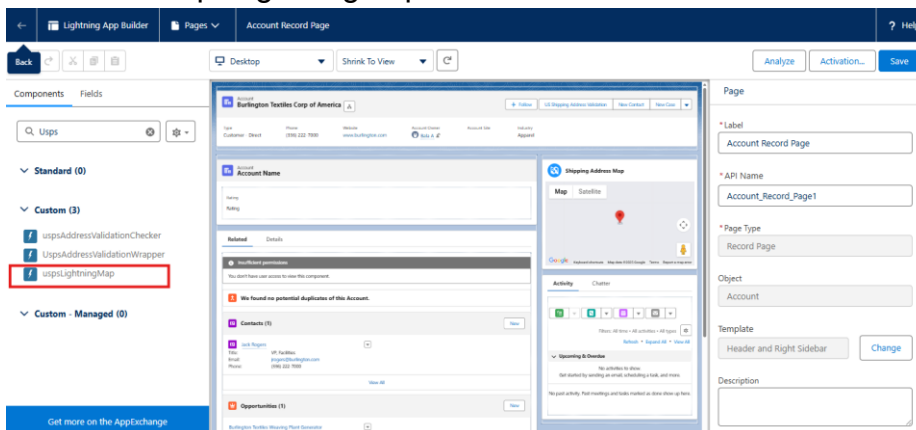
Step 5: Add Map Component to Account Lightning Record Page

Explanation: The map displays the location of validated addresses.

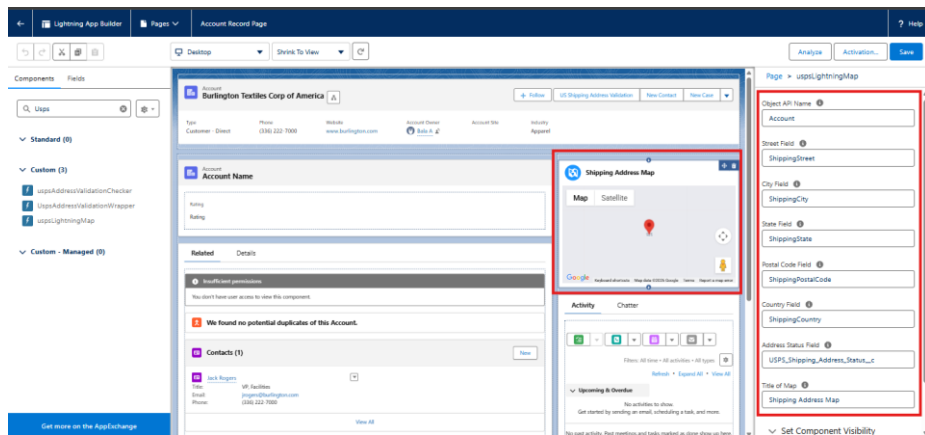
- Open Account Record → Click Edit Page



- Search for uspsLightningMap



- Drag it into the page layout
- Provide required component properties (e.g., city, state fields).

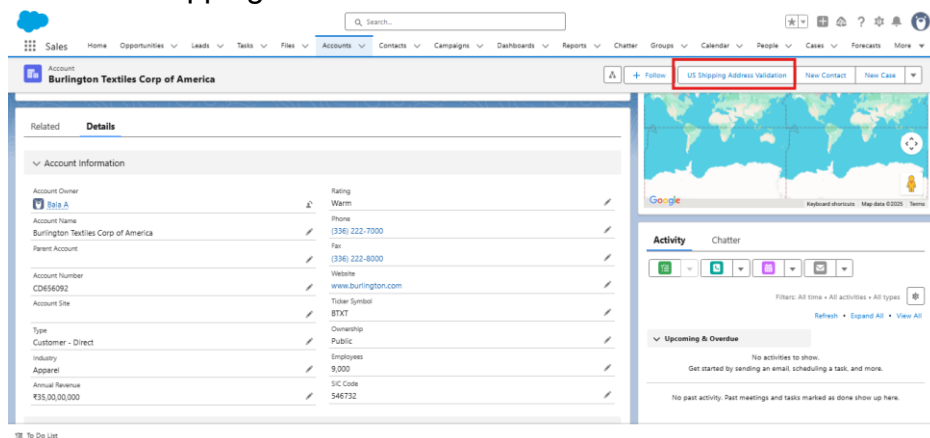


Publish the changes.

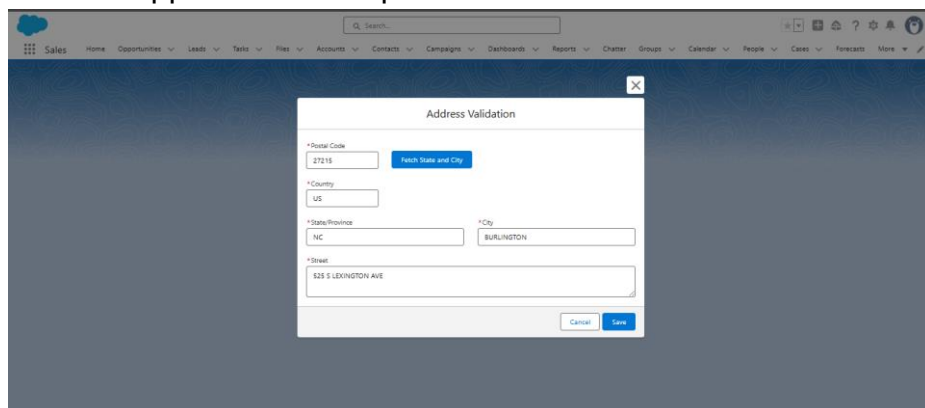
Step 6: Validate Address from Record Page

Explanation: This is the core functionality provided to end users.

- Open any Account record
- Click US Shipping Address Validation



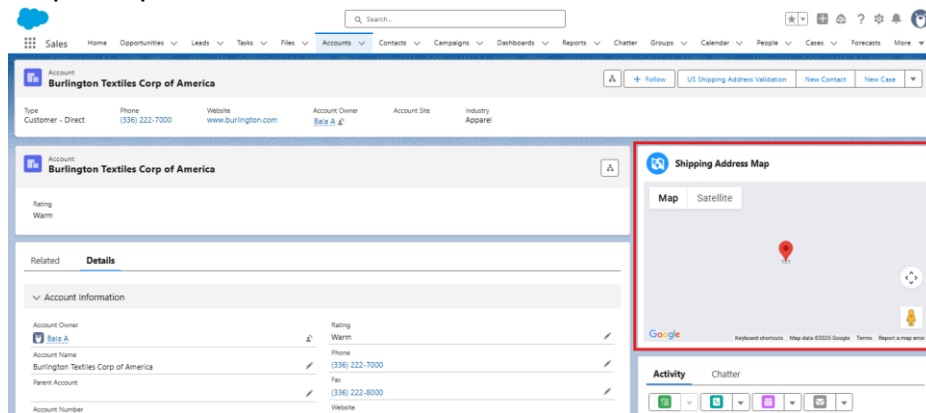
- A modal appears—enter/update address fields



- Click Save

If address is valid:

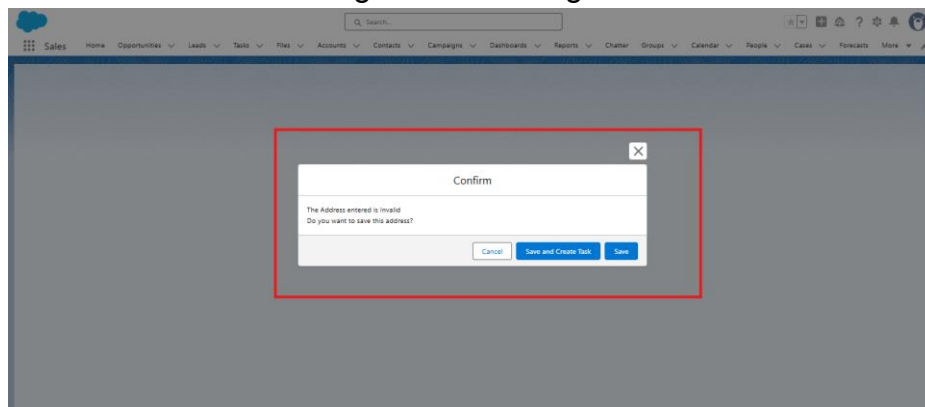
- Address fields are updated
- Map component shows exact location



If address is invalid:

A confirmation dialog appears with options:

- Save: Stores the invalid address
- Save and Create Task: Stores address + creates reminder task
- Cancel: Closes the dialog without saving



Steps to Configure for Custom or Standard Objects

Use these steps to enable address validation on any object—custom or standard.

Step 1: Create USPS Address Status Field

Explanation: The status field stores the USPS validation result.

- Create a new field on your object
- Select Global Picklist Value Set → USPS Address Status

The screenshot shows the 'New Custom Field' dialog box, Step 2 of 5. The 'Field Label' is 'USPS Shipping Address Sta'. The 'Values' section shows 'Use global picklist value set' selected. A dropdown menu is open showing 'Client Accounts' and 'USPS Address Status'. The 'Field Name' is 'USPS_Shipping_Address_S'.

Step 2: Create a New Validation Button

Explanation: Each object requires its own validation button with parameters.

- Go to Object → Buttons, Links, and Actions
- Click New Button or Link

Set:

- Label: e.g., Validate Shipping Address
- Display Type: Detail Page Button
- Behavior: Display in existing window
- Content Source: URL

Use URL format:

```
/lightning/cmp/c__UspsAddressValidationWrapper?c__recordId={!Account.Id}&c__objectApiName=Account&c__streetField=ShippingStreet&c__cityField=ShippingCity&c__stateField=ShippingState&c__postalField=ShippingPostalCode&c__countryField=ShippingCountry&c__uspsStatusField=USPS_Shipping_Address_Status__c
```

Replace fields with your object's values.

Step 3: Add Button to Page Layout

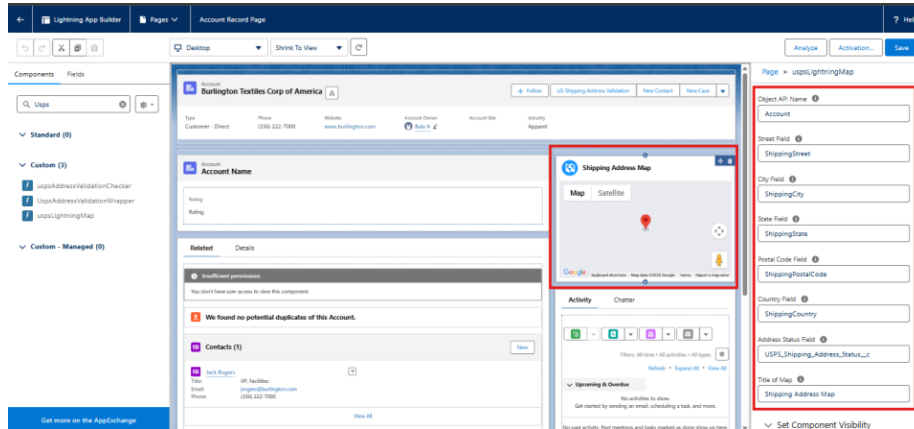
Explanation: This makes the feature available for users.

- Open the object's page layout
- Add the newly created validation button.

Step 4: Add Map Component to Lightning Record Page

Explanation: Shows validated address on a map.

- Open record → Edit Page
- Search for uspsLightningMap
- Drag component onto page
- Enter required field mappings.



Save and activate.