

Post-Installation Admin Guide for UK Address Finder

Thank you for installing the UK Address Finder from the Salesforce AppExchange! To ensure full functionality, please complete the following steps.

Step 1: Assign the *External Credential Access* Permission Set

Purpose: *This permission set is required to enable external Named Credential-based functionality used by the app.*

Instructions

1. Go to **Setup**.
2. Search for **Permission Sets**.
3. Click on **External Credential Access**.
4. Click **Manage Assignments** > **Add Assignments**.
5. Select relevant users and click **Assign** > **Done**.

NOTE: Required for all users who will use the app's external services.

Step 2: Add the Component to Lightning Record Pages

Purpose: *To enable the address lookup and display feature on object pages.*

Instructions:

1. Go to **Setup** > **Object Manager**.
2. Open the target object (e.g., **Account**, **Contact**, or custom object).
3. Go to **Lightning Record Pages** and open or create a record page.
4. Drag the **UK Address Finder** onto the layout.
5. **Save** and **Activate** the page.

NOTE: Add only to objects where address lookup is needed.

Step 3: Complete the One-Time Setup (Admin Only)

Purpose: *Configure which address fields will be visible and editable for users.*

Instructions:

1. Go to the app's **Setup Page** (usually found in the app's navigation or tab bar).
2. Select the object(s) you want to enable address lookup for.
3. Choose the specific **address fields** to be shown on layouts.
4. Click **Add All Addresses** and then **Save**.

NOTE: This step is required once by an admin or user with admin permissions.

Important:

- All users will see the **same selected address fields**, depending on their **field-level visibility settings**.
- Users can **only edit fields** they have write access to, based on their **profile or permission set**.

Need Help?

Contact us at hello@cms-wise.com or visit <https://www.cms-wise.com/> for full documentation and support.