addresstools

ADDRESSTOOLS FREE INSTALLATION GUIDE

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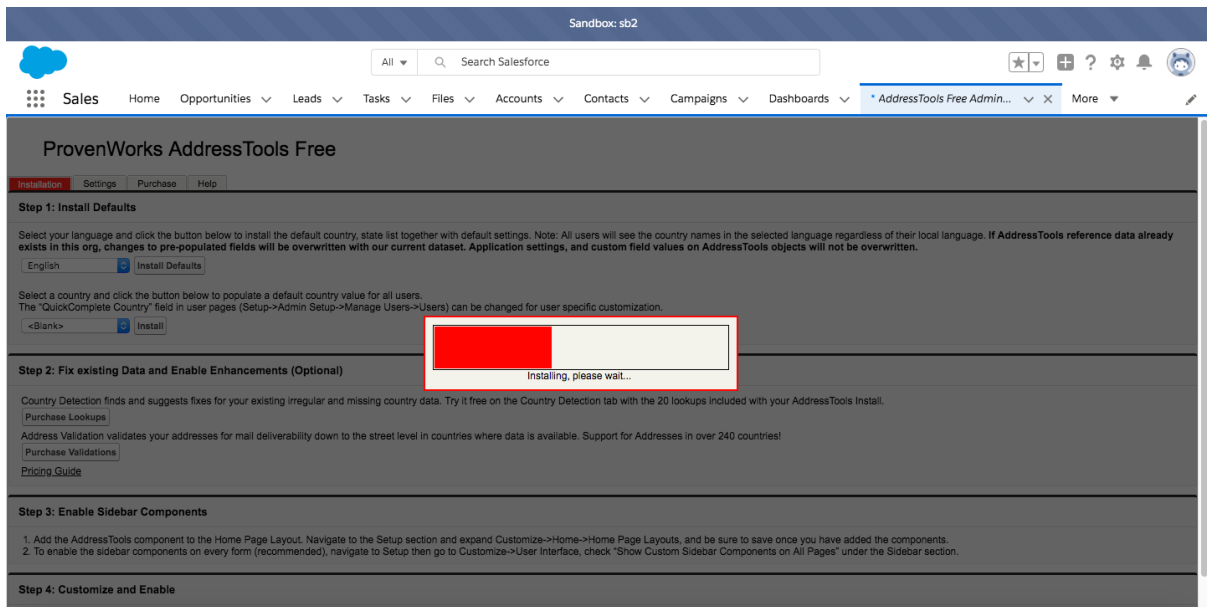
INSTALLATION

Go to **App Launcher | AddressTools Free Administration**.
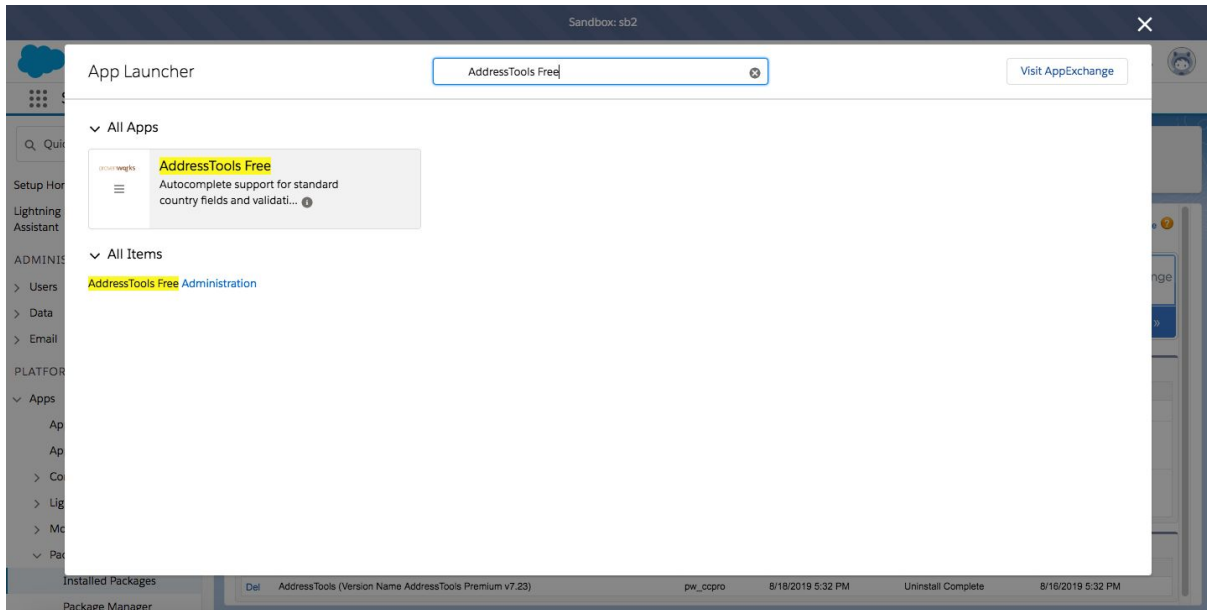
Under **Install Defaults**, choose a **Language** from the first select list**.**

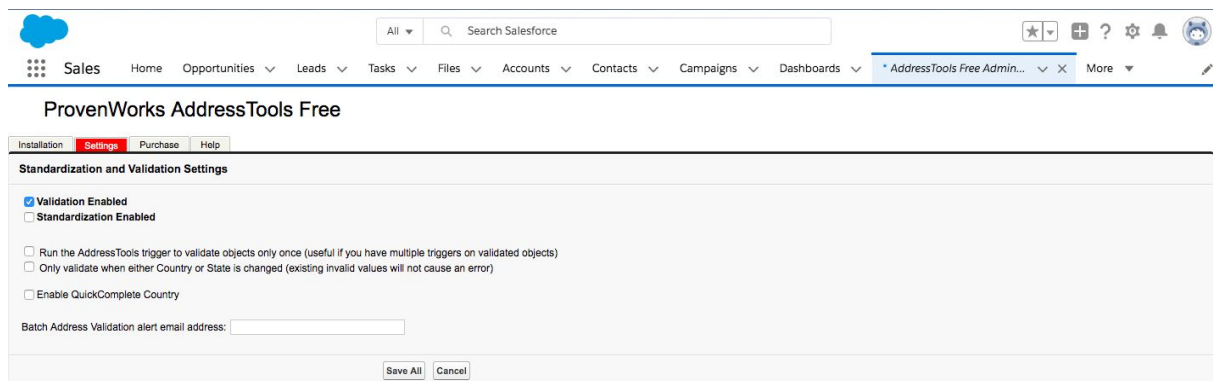Select **Install Defaults.**

ENABLE DATA VALIDATION

Go to **App Launcher | AddressTools Free Administration**.

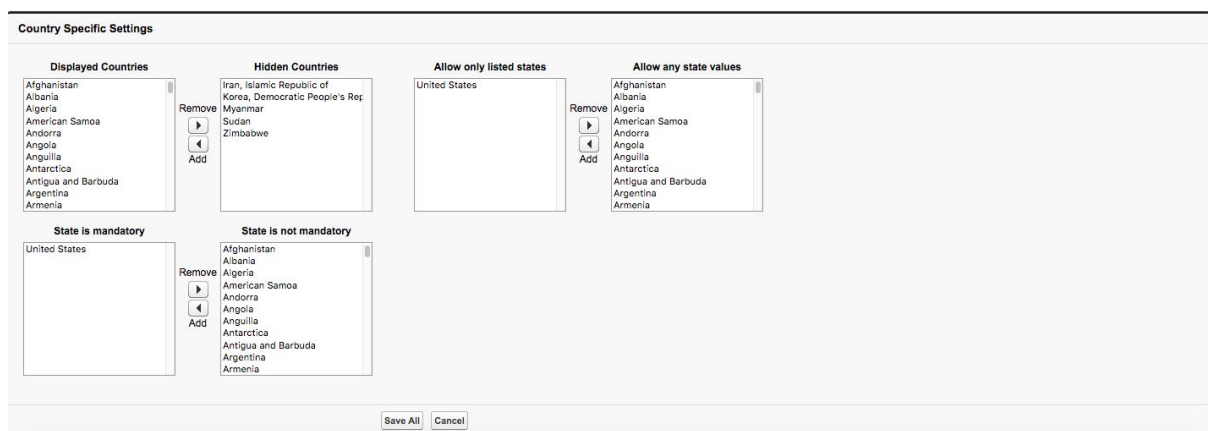Select **Settings.**

Check **Validation Enabled.**

Select **Save All.**

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

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

Select **Save All.**

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

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

Tip: you can identify the address block by observing the Object and Country Field column.

Fields to Validate / Standardize

Action	Object	Record Type	Country Field	State Field	Country Mandatory	Only Listed Countries	Standardize
Edit | Del	Account		BillingCountry	BillingState	✓	✓	✓
Edit | Del	Account		PersonMailingCountry	PersonMailingState	✓	✓	✓
Edit | Del	Account		PersonOtherCountry	PersonOtherState	✓	✓	✓
Edit | Del	Account		ShippingCountry	ShippingState	☐	✓	✓
Edit | Del	Contact		MailingCountry	MailingState	✓	✓	✓
Edit | Del	Contact		OtherCountry	OtherState	☐	✓	✓
Edit | Del	Contract		BillingCountry	BillingState	✓	✓	✓
Edit | Del	Contract		ShippingCountry	ShippingState	✓	✓	✓
Edit | Del	Lead		Country	State	✓	✓	✓

Add | Reset to Defaults | Save All | Cancel

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

Validation covers the following settings: Country Mandatory, Allow Only Listed Countries, State Mandatory, Allow Only Listed States.

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

Global Settings

☑ Country Mandatory   ☐ Standardize Country
☑ Allow Only Listed Countries   ☐ Standardize State

Country Specific Settings

☑ State Mandatory   ☑ Allow Only Listed States

Select **Save**.

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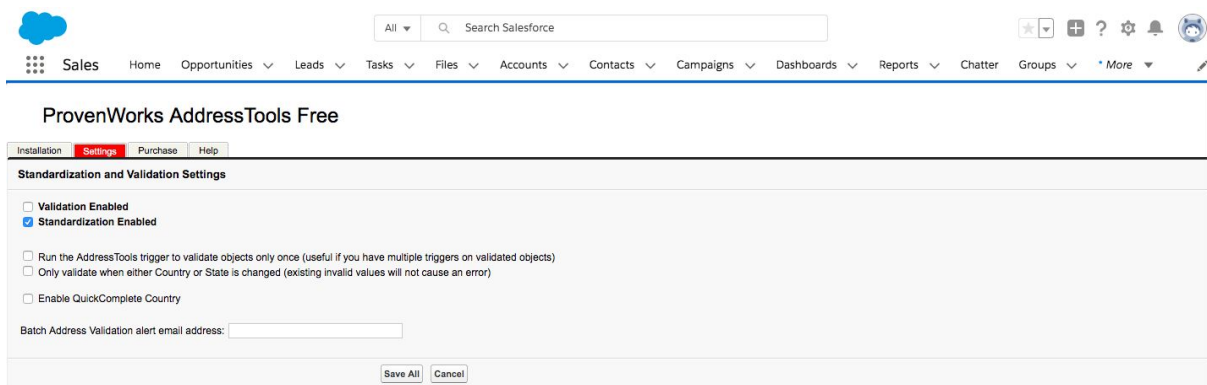
ENABLE STANDARDIZATION

Go to **App Launcher | AddressTools Free Administration**.

Select **Settings.**

Check **Standardization Enabled.**

Select **Save All.**

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

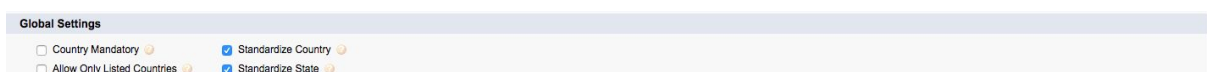Select **Edit** next to the address block you want to modify.

Tip: you can identify the address block by observing the Object and Country Field column.

Navigate to **Global Settings.**

Standardization covers the following settings: Standardize Country, Standardize State.

Configure the **Checkboxes** to meet your standardization requirements.

Select **Save**.

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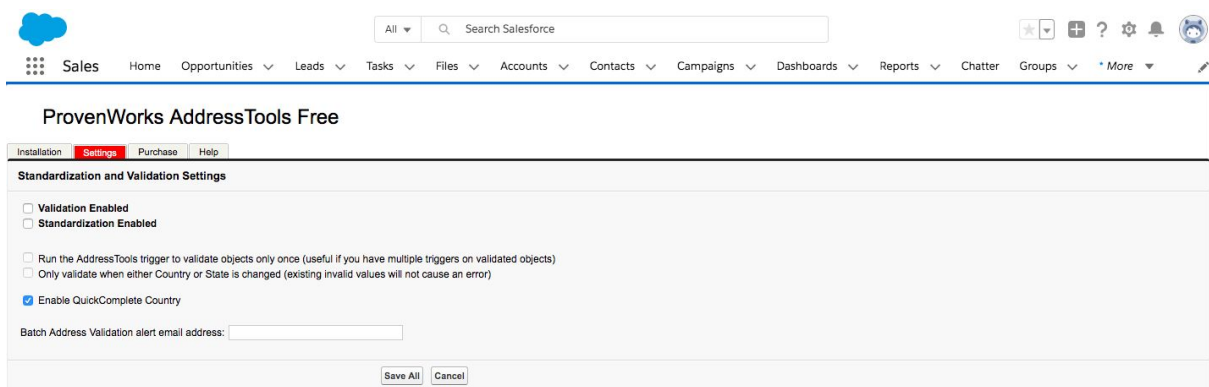
ENABLE QUICKCOMPLETE COUNTRY

Go to **App Launcher | AddressTools Free Administration**.

Select **Settings.**

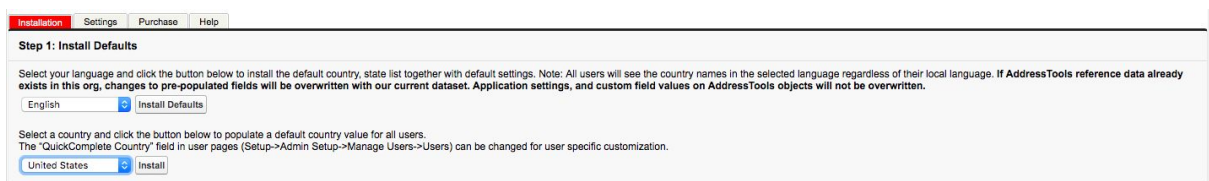Check **Enable QuickComplete Country.**

Select **Save All.**

Select **Installation**.

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

Select **Install**.

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.

Is there any interactive functionality with AddressTools Free?

Salesforce Classic users can take advantage of interactive functionality such as type-ahead suggestions for country and state entries by installing the Chrome browser add-on in a Chrome browser. You can get the add-on here.

Other browsers and Salesforce Lightning users have no supported interactive functionality in AddressTools Free. If you're looking for interactive functionality in Lightning across any browser, check out our AddressTools Premium listing here or book a demo!

Does AddressTools Free support Salesforce Classic?

Yes, all features covered in this guide are supported in Salesforce Classic.

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

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

Can I standardize my countries to ISO-2 or ISO-3 values?

AddressTools Free allows for input of ISO-2 and ISO-3 values but will always standardize them to the full name. AddressTools Premium offers standardization to be stored in the ISO-2, ISO-3 values and even supports the local name in latin or native characters.

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.

If you require more functionality such as support for custom objects or fields, check out
AddressTools Premium here or book a demo!