

iTools

State/Country Validation



Configuration Guide

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Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools State/Country Validation.

About iTools State / Country Validation

iTools State/Country Validation is the automated way to maintain accurate, consistent and complete State and Country values for Salesforce CRM addresses.

Automation

iTools validation works 'behind the scenes' with absolutely no impact on the way your users add or update addresses. iTools State/Country Validation supports the standard address fields for Accounts, Contacts, Leads, Contracts and Users. Whenever an address value is added or updated, iTools validation will kick in. It works the same for a single address update as it does for 'bulk' updates made using tools such as Import and Data Loader.

iTools State/Country Validation also provides an interface to validate existing addresses. You can clean up thousands (or millions) of your existing addresses with a click of a button.

Accuracy

iTools State/Country Validation relies on an international standards-based library of content to deliver accurate results. Country and State names are provided in multiple languages and multiple formats. iTools even provides an interface for you to customize and extend the content library to fit the needs of your organization. Name variations that you regularly encounter such as custom abbreviations, common misspellings, alternate names, foreign languages and names with decorated characters can be added to the library and used in the validation process.

iTools State/Country Validation finds invalid and missing values, plus incorrect state/country value combinations. It even knows how to properly handle state names and abbreviations that are shared by more than one country. When iTools identifies an address with improper state and/or country values, it flags the address with an address



validation code indicating the type of problem encountered. iTools State/Country Validation codes include:

- Missing State and Country
- Invalid State and Country
- Invalid Country
- Invalid State
- Missing State
- Missing Country
- Invalid State and Country combination

To review and correct improper values in Salesforce CRM addresses, iTools provides an easy to use custom view to make the clean-up process quick and painless.

Consistency

iTools State/Country Validation enhances the quality of your Salesforce CRM addresses by standardizing the values in the state and country fields to a single, preferred format for the value. No longer will you have to manage multiple versions of a state or country name like USA, US, U.S.A, United States of America, United States, etc. Better yet, iTools lets your organization decide what format of the state and country name it should use during standardization.

For organizations where address information is entered in multiple languages, iTools will select the preferred name for the state or country within the set of names of the same language. This allows the names to be standardized without changing the language of the value.

Completeness

Because the country field is often left blank, iTools will attempt to add the correct country to the address during the validation processing. As long as the value in the state field is valid and unique across all countries, iTools knows how to find the right country name and fill in the missing information. And, it selects the country name in the language that matches the language of the state name.

To complete each address, iTools State/Country Validation attaches a country code to each address that has a valid country value. A country code is especially useful if your organization frequently enters address information in multiple languages, since the code is language independent. Your organization can use the country code to simplify report criteria, formulas, views, validation rules, workflow rules and more. The country code can also be used to integrate with 3rd party applications and services.



Lightning Support

iTools State/Country Validation fully supports the Salesforce.com Lightning user interface as well as the Classic user interface. All the user interface components have been designed to style themselves based on the user interface of the current user. This means you can easily use iTools in an all Classic org, an all Lightning org, or one with some users using Classic and some using Lightning. iTools will even support those users that switch between user interfaces depending on their task.

Installation and Configuration Overview

This guide is designed to lead you through the necessary installation and configuration steps for iTools State/Country Validation. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are three basic parts to the process. To begin, this guide shows how to install the iTools State/Country Validation into your Salesforce environment. Second, it leads you through the process of configuring and using iTools State/Country Validation to improve the completeness and accuracy of your addresses. Finally, this guide explains how to properly apply State/Country Validation licensing. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the *Help and Support* section at the end of this document.



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Before You Begin

iTools are designed for use with Salesforce.com Professional, Developer, Enterprise, Unlimited, and Performance editions and their sandboxes. Installation into any other edition, including Team and Group Editions, is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install iTools State/Country Validation into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 5.0 or higher must be installed and a license assigned to your account.

Periodically Salesforce will change the user interface to improve the usability of the Salesforce application or the AppExchange marketplace. Many times, these changes only take effect when you enable an option in the **User Interface** section of Setup. This guide will attempt to reference navigational steps and screen shots using the latest version of the Salesforce user interface. There will be times, however, when Salesforce releases a new interface before a new version of this guide is released. There will also be cases when this guide references a version of the user interface that you have not enabled in your Salesforce environment. If you encounter a situation where you are unable to translate any of these differences, please contact our support organization and they will be more than happy to assist you.



Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 5.0 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools Configuration Manager** by searching for “iTools Configuration Manager” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS>

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.



If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool’s AppExchange listing or on our website at <https://www.insitusoftware.com/itools-documentation>



Installing iTools State/Country Validation

iTools State/Country Validation can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

<https://appexchange.salesforce.com/>

2. Locate the listing for **iTools State/Country Validation** by searching for “iTools State” or direct your browser to:

<https://appexchange.salesforce.com/appxListingDetail?listingId=aON3000001rYC1EAM>

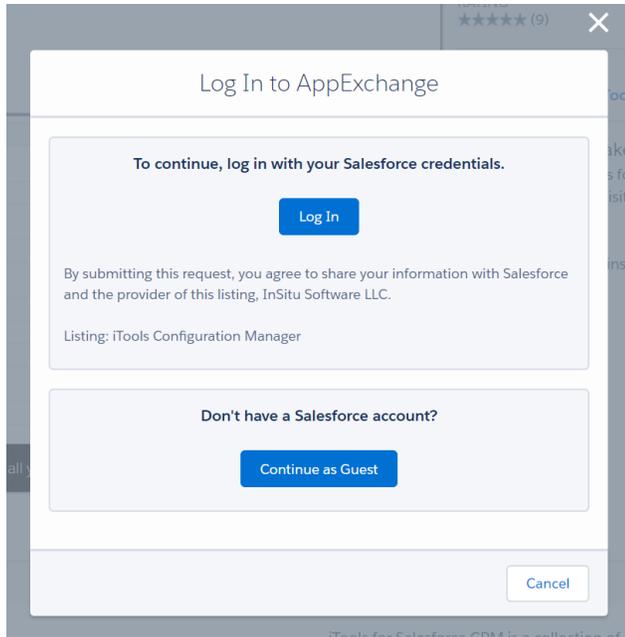


Make sure you are on the AppExchange listing for the **iTools State/Country Validation**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.



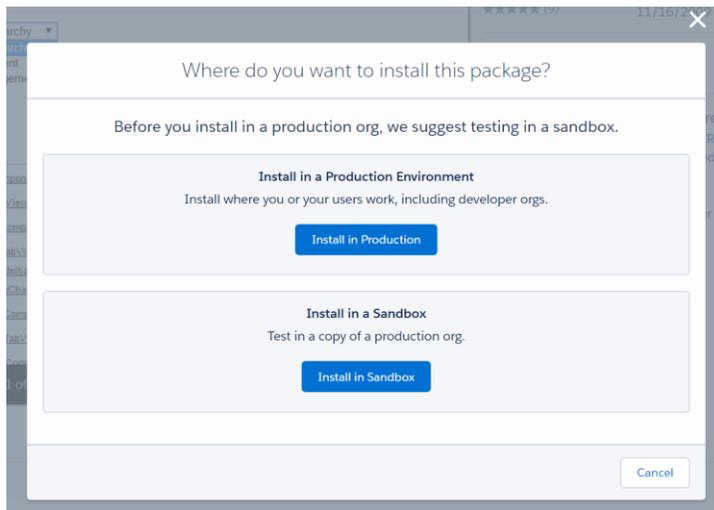
If you accessed the AppExchange from the [AppExchange Marketplace](#) link in the Setup section of Salesforce.com and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the install will be the same.

3. Click the **Get It Now** button.
4. If you have not already logged into the AppExchange, you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



After logging in you may be returned to the iTools State/Country Validation listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools State/Country Validation into a Production or Sandbox Environment. iTools will work properly in either environment.



If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.



- The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.

Confirm Installation Details

Review the [customization guide](#) for installation and configuration steps.

Package	Version
iTools State/Country Validation (3.0 / 3.0.0)	3.0 / 3.0.0
Subscription	Organization
Free	InSitu Software
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	
docadmin@insitusoftware.com	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Bob	* Company	InSitu Software
* Last Name	Nagy	* Country	United States
* Job Title	Co-Founder	* State/Province	Illinois
* Email	development@insitusoftware.com		
Phone			

I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Allow the provider to contact me by email, phone, or SMS about other products or services I might like

[Cancel](#) [Confirm and Install](#)

- Choose the initial access to package resources.

For users to be able to use iTools State/Country Validation they must be granted permission to access the custom objects, Apex classes, and Visualforce pages that make up the application. Since the iTools State/Country Validation screens are generally only needed by system administrators we recommend you choose the **Install for Admins Only** option.



The screenshot shows a configuration window with three radio button options for user access:

- Install for Admins Only
- Install for All Users
- Install for Specific Profiles...

At the bottom right, there are two buttons: **Install** and **Cancel**.



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools State/Country Validation is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The install of the iTools State/Country Validation package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the install requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.



If you did not install the iTools Configuration Manager version 5.0 or greater before attempting to install iTools State/Country Validation, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

(iTools Configuration Manager 5.0) A required package is missing Package "iTools Configuration Manager", Version 5.0 or later must be installed first.



iTools Settings

All iTools, including State/Country Validation, a set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

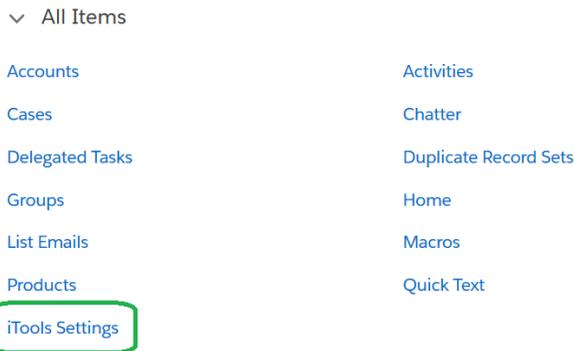
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of State/Country Validation. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

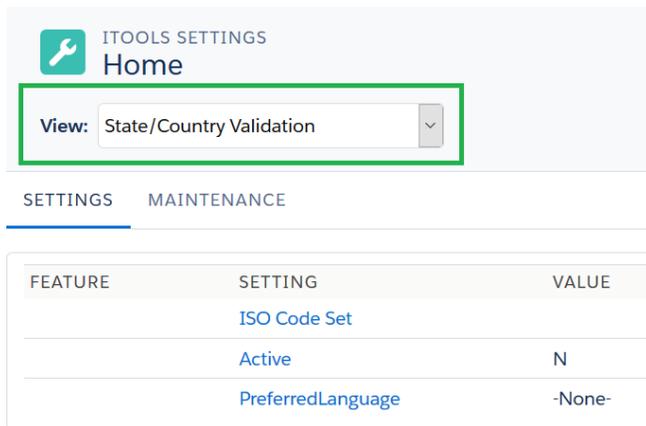
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the “nine dot” icon  in the top left of any page.
2. Click the iTools Settings option in the All Items section



3. Select “State/Country Validation” in the View dropdown list if it is not already selected.





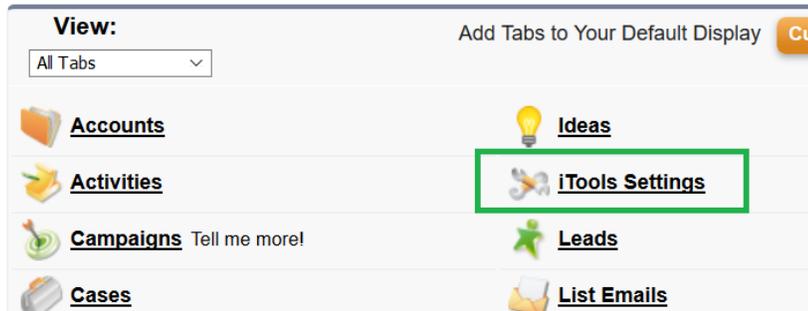
4. Locate the referenced setting in the Setting column and click it.

If you are using the Classic User Interface

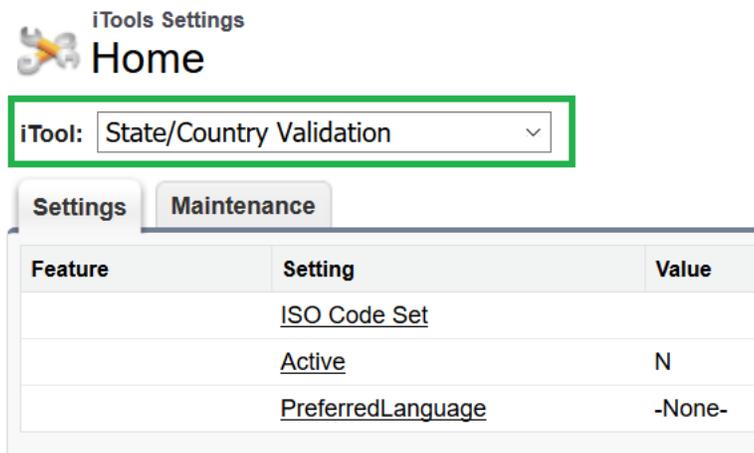
1. Click the “plus” tab  at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs

All Tabs

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) that better suit the way you work.



3. Select “State/Country Validation” in the iTool dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.



Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.



Configuring State/Country Validation

Now that iTools State/Country Validation is installed there are a few simple configuration tasks which must be completed before you can begin to use the tool.

Initialize State/Country Content

Now that the iTools State/Country Validation is installed and the custom objects for Country and State information has been added to your org, they must be populated with content used by the validation process. Without content in the State/Country Validation custom objects, the iTools validation will not run. Follow these quick and easy steps to initialize the iTools custom objects with State/Country content:

1. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.

 ITOOLS STATE/COUNTRY VALIDATION
Manage Address Content and Status

Welcome to iTools State/Country Validation!
To prepare the State/Country content for your organization, you must specify the Country Code Set you would like to use.
The country Code Set options include the following:
ISO-2A: Two letter alphabetic country code (most widely used).
ISO-3A: Three letter alphabetic country code (better visual association between the codes and the country names than the alpha-2 codes).
ISO-3N: Three letter numeric country code (often used for organizations and systems using non-Latin scripts).

Country Code Set:

Click on the button below to initialize your organization with content for iTools State/Country Validation. The initialization will take some time, so watch the browser progress bar for current status. Upon completion, your organization will contain the content needed to properly validate state and country values.

[Initialize State/Country Content](#)



2. Select the **Country Code Set** you want to use in your organization.



iTools State/Country Validation attaches a country code to each address that has a valid country value. Your organization can use the country code to simplify report criteria, formulas, views, validation rules, workflow rules and more. The country code can also be used to integrate with 3rd party applications and services.

iTools State/Country Validation gives you the flexibility to choose which country code set to use for your organization. While the iTool supports all three ISO 3166-1 country code sets, an organization must select one of the three sets to use during address validation. The country code set is selected as part of the initialization process and **cannot** be changed after initialization has completed. Therefore, you will want to carefully consider which country code set to use.

Country Code Sets

Country Codes are used to represent names of countries, dependent territories and special areas of geographical interest. The most widely accepted and up-to-date country code standard is defined by the International Organization for Standardization (ISO) in ISO 3166.

ISO 3166-1 defines three sets of country codes:

- ISO 3166-1 alpha-2 — two-letter country codes which are the most widely used of the three.
- ISO 3166-1 alpha-3 — three-letter country codes which allow a better visual association between the codes and the country names than the alpha-2 codes.
- ISO 3166-1 numeric — three-digit country codes which are the same as those maintained by the United Nations Statistics Division and are useful for people or systems using non-Latin scripts.

To learn more about ISO, ISO 3166, and country codes, visit the ISO website at:

http://www.iso.org/iso/country_codes.htm

3. Click on the **Initialize State/Country Content** button.

Due to the size of data that must be processed, the initialization of the State/Country content may take some time. The browser progress bar will automatically update to show the completion status of the content initialization as it progresses. It is recommended that you **not** hit the **Initialize State/Country Content**



button more than one time and you stay on the current page until the initialization has completed.

When the State/Country Content initialization process has completed, the current page will update and present the following view:

ITOOLS STATE/COUNTRY VALIDATION
Manage Address Content and Status

View: Account - Billing Address

Important Note: iTools State/Country Validation is currently not set to active so no actions are available. To activate iTools State/Country Validation, go to the iTools Settings tab and select the State/Country Validation option in the iTools list. Then, select the 'Active' setting, chose 'Edit' and choose the 'Yes' option. Additional information can be found in the iTools State/Country Validation Configuration Guide.

ADDRESS STATUS	NUMBER OF ADDRESSES	ACTION
Address Not Validated	21	
Missing State and Country	0	
Invalid State and Country	0	
Invalid Country	0	
Invalid State	0	
Missing State	0	
Missing Country	0	
Invalid State and Country combination	0	
No Address	0	

Validate Addresses
iTools performs validation whenever an address is added or updated. iTools can also validate a specific set of addresses on request for situations such as:



Customize the iTools State/Country Names Library

iTools State/Country Validation relies on an international standards-based library of state and country names to properly validate address values. Country and State names are provided in multiple languages and multiple formats. This content was loaded into your Salesforce.com environment during the Initialize State/Country Content process.

While the standards based State/Country content is very accurate, it doesn't completely account for many values you may find in your Salesforce data. On probably too many occasions, users have entered alternate forms of a state or country value such as a misspelled name, a non-standard abbreviation or an uncommon alternate name. These alternate versions of state and country names are probably not contained in the iTools content. With iTools State/Country Validation, you can augment the State/Country content with additional state and country values that you frequently encounter in your Salesforce.com environment.

For example, if you do a lot of business with companies in United Arab Emirates, you may find the word 'Emirates' spelled incorrectly (e.g. Emirits or Emirats). If this is the case, you can add these name variations to the content library. When the misspelled country name is validated, iTools will standardize it to the correct value, mark the country as valid and set the proper country code. If the name variations are not added to the content library, iTools will mark the address with an 'Invalid Country' status code and no country code will be provided.

If you are aware of alternate state and country names frequently entered by your users, it is a good practice to add these names to the library before activating State/Country Validation. By doing so, there will be fewer addresses marked with an invalid status code and fewer addresses that need manual clean-up.

Another update you may want to make to the State/Country library before activating iTools is to verify the preferred name for certain states and countries. By default, iTools sets the ISO Standard Country Name as the preferred name for all countries, such as 'United States of America'. If the standard for your organization is 'USA', then you will want to change the preferred value for the country from 'United States of America' to 'USA'.

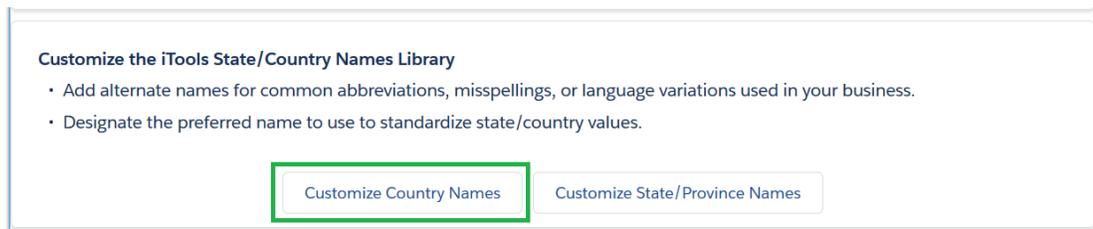


If you are not aware of common alternate country or state names that may exist in your Salesforce data, then you do not have to update the State/Country library at this point. Skip the remainder of this section and continue with the following configuration steps. You can always come back and add alternate State and Country names later, even after the existing addresses have been validated.



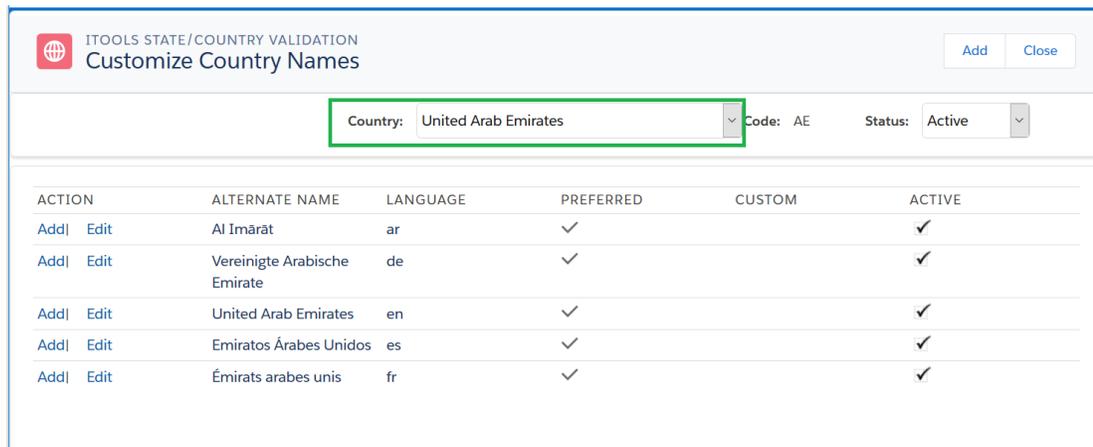
To customize the library of Country Names, follow these simple steps:

1. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.
2. Scroll down to the middle of the page and click on the **Customize Country Names** button.



To add an alternate name for a country, such as 'United Arab Emirates', follow steps 3 through 6.

3. On the Customize Country Names page, select 'United Arab Emirates' in the **Country** drop-down list.



4. Click the **Add** button.



5. In the New Alternate Country Name page, enter the Alternate Name value and verify the language selection. Since you are entering a misspelled name, do **not** check the **Preferred** checkbox.

ITOOLS STATE/COUNTRY VALIDATION
New Alternate Country Name

Alternate Name for: United Arab Emirates Code: AE

Alternate Name: United Arab Emirats

Language: English

Preferred:

Save Cancel

6. Click on the **Save** button to save the alternate name and return to the Customize Country Names page.

To update the preferred name for a country, follow steps 7 through 10. In the example, the alternate country name 'USA' will be set as the preferred name for 'United States of America'.

7. On the Customize Country Names page, select 'United States of America' in the **Country** drop-down list.
8. In the details section of the Customize Country Names page, select the **Edit** link next to the list entry for the Alternate Name of USA. Notice the preferred checkbox is **not** checked.

ITOOLS STATE/COUNTRY VALIDATION
Customize Country Names

Country: United States of America

ACTION	ALTERNATE NAME	LANGUAGE	PREFERRED
Add Edit	Vereinigete Staaten	de	<input checked="" type="checkbox"/>
Add Edit	United States	en	<input type="checkbox"/>
Add Edit	United States of America	en	<input checked="" type="checkbox"/>
Add Edit	US	en	<input type="checkbox"/>
Add Edit	USA	en	<input type="checkbox"/>
Add Edit	Estados Unidos	es	<input checked="" type="checkbox"/>
Add Edit	États-Unis	fr	<input checked="" type="checkbox"/>



9. In the Edit Alternate Country Name page, check the **Preferred** checkbox.

ITOOLS STATE/COUNTRY VALIDATION
Edit Alternate Country Name

Alternate Name for: United States of America Code: US

Alternate Name USA
Language en
Preferred
Status Active

10. Click on the **Save** button to save the changes to the alternate name and return to the Customize Country Names page. Notice how the USA entry in the Alternate Name list displays the **Preferred** checkbox as checked.

To customize the library of State/Province Names, follow these simple steps:

11. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.
12. Scroll down to the middle of the page and click on the **Customize State/Province Names** button.

Customize the iTools State/Country Names Library

- Add alternate names for common abbreviations, misspellings, or language variations used in your business.
- Designate the preferred name to use to standardize state/country values.

Customize Country Names Customize State/Province Names



To add an alternate name, such as 'ILL', for the state of 'Illinois', follow steps 13 through 16.

13. On the Customize State/Province Names page, select 'United States of America' in the **Country** drop-down list and 'Illinois' in the **State/Province** drop-down list.

ACTION	ALTERNATE NAME	LANGUAGE	SHORT NAME	PREFERRED	CUSTOM	ACTIVE
Add Edit	Illinois	en		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Add Edit	IL	en	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

14. Click the **Add** button.

15. In the New Alternate State/Province Name page, enter the Alternate Name value and verify the language selection. Since you are entering a non-standard abbreviation name, do **not** check the **Preferred** checkbox.

Alternate Name for: Illinois

Alternate Name:

Language:

Type:

Preferred:

16. Click on the **Save** button at the bottom of the page to save the alternate name and return to the Customize State/Province Names page.



To update the preferred name for a state, follow steps 17 through 20. In the example, the alternate state name 'Cuzco' will be set as the preferred name for the state 'Cusco', which is located in Peru.

17. On the Customize State/Province Names page, select 'Peru' in the **Country** drop-down list and 'Cusco' in the **State/Province** drop-down list.

ACTION	ALTERNATE NAME	LANGUAGE	SHORT NAME	PREFERRED	CUSTOM	ACTIVE
Add Edit	Cusco	es		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Add Edit	Cuzco	es		<input type="checkbox"/>		<input checked="" type="checkbox"/>

18. Select the **Edit** link next to the list entry for the Alternate Name of Cuzco. Notice the preferred checkbox is **not** checked.

ACTION	ALTERNATE NAME	LANGUAGE	SHORT NAME	PREFERRED
Add Edit	Cusco	es		<input checked="" type="checkbox"/>
Add Edit	Cuzco	es		<input type="checkbox"/>

19. In the Edit Alternate State/Province Name page, check the **Preferred** checkbox.

Alternate Name for: Cusco

Alternate Name Cuzco
Language es
Type Full
Preferred
Status Active

20. Click on the **Save** button to save the changes to the alternate name and return to the Customize State/Province Names page.



Activate State/Country Validation

iTools State/Country Validation is not activated by default when the package is installed into your Salesforce.com environment. This gives you the opportunity to review and customize the State/Country library content before any addresses are validated.

Follow these simple instructions to activate State/Country Validation:

1. Access the **Active** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click on the **Edit** button.
3. Click the **Yes** option.

The screenshot shows a dialog box titled "ITools Setting Edit" with a sub-header "Active". The dialog contains a "Value" section with two radio buttons: "Yes" (selected) and "No". Below this is a "Description" section that reads "Indicates if the iTools State/Country Validation is active." At the top right of the dialog, there are "Cancel" and "Save" buttons.

4. Click the **Save** button.



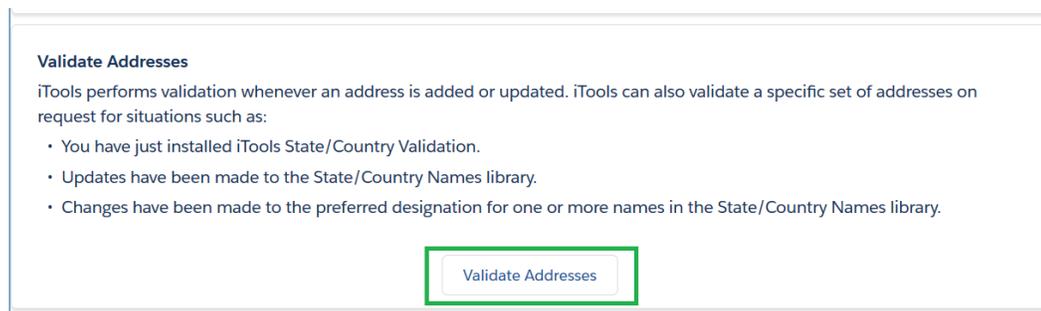
Run Validation on Existing Addresses

When iTools State/Country Validation is installed, configured and activated, any address added or existing address that is updated will be automatically validated. For all addresses currently in your Salesforce.com environment to be properly validated, iTools State/Country Validation provides a custom view to initiate address validation for a select set of addresses, including all current addresses not yet validated.

If you are a large (or even mid-sized) organization with thousands (or millions) of Contacts, Accounts, Leads, etc., it is reasonable to assume the process to validate all existing addresses will take some time to complete. iTools State/Country Validation employs a special batch process mechanism to perform the mass validation. You can simply “kick off” the process and continue on with other work in Salesforce while iTools State/Country Validation runs in the background on the Salesforce.com servers.

To validate existing addresses in batch, follow these quick and easy steps:

1. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.
2. Click on the **Validate Addresses** button in the middle of the page.



3. Select the addresses to validate. If you are running this process for the first time as part of your initial deployment, you should check the first checkbox – **Validate only those addresses that have not been validated**.
4. Select the objects to validate. If you are running this process for the first time, you should check all the checkboxes.



5. Click on the **Validate Addresses** button to begin the mass validation process.

ITools STATE/COUNTRY VALIDATION
Validate Addresses

Validate Addresses Close

Select the addresses to validate:

- Validate only those addresses that have not been validated.
• Choose this option when there are many addresses that have not yet been validated.
- Validate addresses with invalid or missing values.
• Choose this option after you have run validation and then made updates to the State/Country Names library.
- Validate all addresses.
• Choose this option after you have run validation and then changed the preferred designation for one or more names in the State/Country Names library.

Select the objects to validate:

- Account
- Contact
- Contract
- Lead
- User

6. The screen will refresh with the Validation Status displayed in the message area at the top of the page:

ITools STATE/COUNTRY VALIDATION
Validate Addresses

Validate

i Messages

Validation Status:

- Account: An address validation job has been queued.
- Contact: An address validation job has been queued.
- Contract: There are no addresses of this type to validate or too many jobs already in progress.
- Lead: An address validation job has been queued.
- User: An address validation job has been queued.

An address validation job will be queued for every standard object type selected to be validated. If there are no addresses of a particular object type, then an address validation job will **not** be queued.

To monitor the progress and status of the iTools State/Country Validation jobs go to the Apex Jobs section in Setup. Locate the entries in the Apex Jobs list with the value



InSitu_BatchSCValidation listed in the Apex Class column. This Salesforce.com page provides you with all the information you need to monitor the status of the Validation jobs. The iTools State/Country Validation has completed the batch validation when the number in the **Batches Processed** column is equal to the number in the **Total Batches** column for all iTools Validation jobs.



Correct Invalid Addresses

iTools State/Country Validation finds invalid and missing values, plus incorrect state/country value combinations. When iTools identifies an address with improper state and/or country values, it flags the address with an address validation code indicating the type of problem encountered. iTools State/Country Validation codes include:

- Missing State and Country
- Invalid State and Country
- Invalid Country
- Invalid State
- Missing State
- Missing Country
- Invalid State and Country combination

To review and correct improper values in Salesforce CRM addresses, iTools provides an easy to use custom view to make the clean-up process quick and painless. Complete the following set of instructions to view and correct invalid addresses:

1. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic.
2. Direct your attention to the top-most section on the page.

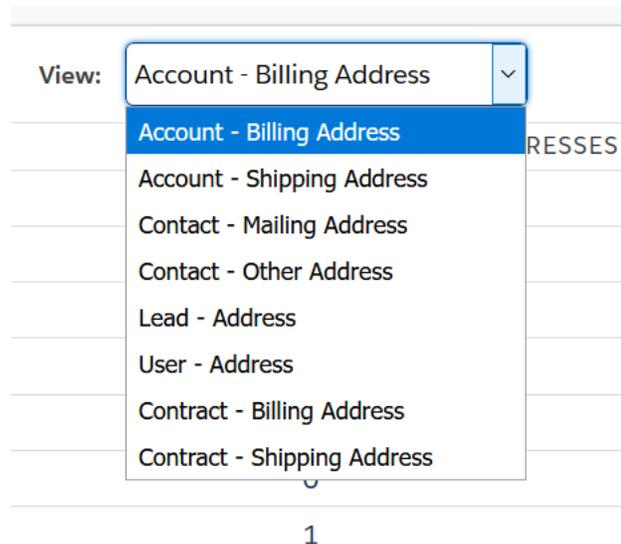
The screenshot shows the 'Manage Address Content and Status' interface. At the top, there is a red globe icon and the text 'ITOOLS STATE/COUNTRY VALIDATION'. Below this is a 'View:' dropdown menu set to 'Account - Billing Address'. The main content is a table with three columns: ADDRESS STATUS, NUMBER OF ADDRESSES, and ACTION.

ADDRESS STATUS	NUMBER OF ADDRESSES	ACTION
Address Not Validated	0	
Missing State and Country	1	Correct Addresses
Invalid State and Country	0	
Invalid Country	0	
Invalid State	0	
Missing State	0	
Missing Country	1	Correct Addresses
Invalid State and Country combination	0	
No Address	4	Correct Addresses



The Address Status section is used to view the number and type of invalid addresses identified by the iTools State/Country Validation process. Instead of viewing information for the entire set of invalid addresses in your Salesforce.com environment, an address type is selected in the **View** list to filter the list for a more efficient review and analysis.

Click on the drop-down arrow to see the list of View options:



iTools State/Country Validation provides this type of view selection to give you the flexibility to prioritize the order of the clean-up process. This is important as the amount of time and resources available to perform address correction may be limited at any point in time. Certain companies place the highest priority on Account information, so they may select the Account Billing and Shipping addresses as the ones to clean up first. If an organization is preparing a big marketing mailing, they may want to correct the values in the Lead addresses.

To make the correction process even more efficient, the iTools custom page groups the addresses to correct based on validation status. Since the actions you take to correct an address are different based on the type of error, this method of grouping makes a lot of sense and may also help you decide how to delegate the work to others. For example, an address that has an invalid state or invalid country status value is most likely one that has the name value spelled incorrectly. You could assign one person the responsibility of correcting the spelling for these addresses, which you would expect to be a quick process. On the other hand, addresses with a validation status of **Missing State and Country** will need more time to correct because it often requires follow-up with the owner or other involved party. You may want to assign two or more people to correct addresses of this type.



- To review and correct a set of addresses based on Validation Status, click on the **Correct Addresses** link in the right-most column. For this example, addresses with a status type of **Invalid Country** will be used.

ITools STATE/COUNTRY VALIDATION Manage Address Content and Status		
View: Account - Billing Address		
ADDRESS STATUS	NUMBER OF ADDRESSES	ACTION
Address Not Validated	0	
Missing State and Country	1	Correct Addresses
Invalid State and Country	0	
Invalid Country	1	Correct Addresses
Invalid State	0	
Missing State	0	
Missing Country	1	Correct Addresses
Invalid State and Country combination	0	
No Address	4	Correct Addresses

- In the Address Correction page, review the address information and any instructions or correction hints provided.

ITools STATE/COUNTRY VALIDATION Address Correction		Close	
Correct:	Account - Billing Address	That Have: Invalid Country	Go!
Now displaying address 1 of 1			
Account:	UO&G South America Check website for address information		
Street	<input type="text" value="Avenida Boyaca 2366 Bogota, Columbia"/>		
City	<input type="text"/>		
State/Province	<input type="text"/>		
Zip/Postal Code	<input type="text"/>		
Country	<input type="text" value="Columbia"/>		
Invalid Country			
<input type="button" value="Save"/> <input type="button" value="Skip"/> <input type="button" value="Reset"/> <input type="button" value="Prev"/>			



5. Make your corrections to fix any invalid field values and click the **Save** button.

The screenshot shows the 'Address Correction' window in the iTools software. At the top, it says 'ITools STATE/COUNTRY VALIDATION Address Correction' with a 'Close' button. Below that, there are two dropdown menus: 'Correct: Account - Billing Address' and 'That Have: Invalid Country', followed by a 'Go!' button. The main area displays 'Now displaying address 1 of 1'. The address details are as follows:

Account:	UO&G South America Check website for address information
Street	<input type="text" value="Avenida Boyaca 2366"/>
City	<input type="text" value="Bogota"/>
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/>
Country	<input type="text" value="Colombia"/> Invalid Country

At the bottom, there are four buttons: 'Save' (highlighted with a green box), 'Skip', 'Reset', and 'Prev'.

The next Account Billing Address with an Invalid Country will be displayed.

If you do not have the information to correct the address at this time, click the **Skip** button to display the next invalid address in the set.



While you are correcting addresses with invalid state or country names, you may encounter a name being spelled incorrectly more than one time, such as 'Columbia' instead of 'Colombia'. To prevent these misspellings from being flagged for manual correction in the future, it is a good practice to add the name variation to the library of State/Country Names. To learn how to add name variations, see the *Customize the iTools State/Country Names Library* section in this guide.



Run Validation after Updates to Names Library

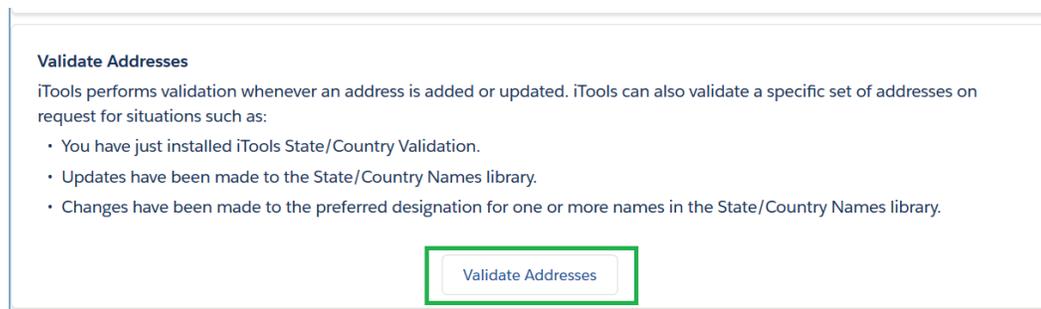
Any customizations made to the Country or State Name Library will enhance the result of the validation process for addresses that are added or updated after the customizations have been saved. Current address values that have not been updated will not automatically be validated using the revised Names Library. The custom interface used to validate existing address values en masse as part of iTools State/Country initialization can be used to re-validate a collection of addresses.

There are two reasons why a re-validation of addresses may be necessary:

1. One or more alternate names have been added to the State and Country Names Library during the address correction process. Instead of manually correcting the same invalid value on multiple addresses, you can run mass validation and let iTools do the job for you.
2. One or more alternate names have been changed to be the preferred value for a state or country. Since existing addresses will still contain the old preferred name, you need to run mass validation so that the new preferred name is consistently applied to all addresses in your Salesforce CRM environment.

To run validation after updates to the Names Library have been made, follow these instructions:

1. Access the **State/Country Validation** tab. The method of accessing this tab is like accessing the iTools Settings tab and will vary depending on your user interface, Lightning or Classic
2. Click on the **Validate Addresses** button in the middle of the page.



3. Select the addresses to validate. If you are running this process because additional names have been added to the State/Country Names Library, you should check the second checkbox – **Validate addresses with invalid or missing values**. If you are running this process because the preferred designation has changed on one or more State or Country Names, you should check the third checkbox – **Validate all addresses**.



4. Select the objects to validate. Unless you have a reason otherwise, you should check all the checkboxes.
5. Click on the **Validate Addresses** button to begin the mass validation process.

ITOOLS STATE/COUNTRY VALIDATION
Validate Addresses

Validate Addresses Close

Select the addresses to validate:

- Validate only those addresses that have not been validated.
• Choose this option when there are many addresses that have not yet been validated.
- Validate addresses with invalid or missing values.
• Choose this option after you have run validation and then made updates to the State/Country Names library.
- Validate all addresses.
• Choose this option after you have run validation and then changed the preferred designation for one or more names in the State/Country Names library.

Select the objects to validate:

- Account
- Contact
- Contract
- Lead
- User

6. The screen will refresh with the Validation Status displayed in the message area at the top of the page:

An address validation job will be queued for every standard object type selected to be validated. If there are no addresses of a particular object type, then an address validation job will **not** be queued.



Configuration Options

All iTools, including State/Country Validation, include a set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab. The complete set of configuration options for State/Country Validation are as follows:

ISO Code Set

Indicates which ISO Code Set of the three available is used to fill the Address Country Code custom fields for addresses that contain a valid country value. The State/Country Validation iTool updated the ISO Code Set setting value during content initialization and set the value as *Read-only*. Therefore, you can view the setting, but you will not be able to change the value.

Additional information regarding ISO Country Code sets can be found in the *Initialize State/Country Content* section of this document

Active

Indicates if the State/Country Validation processing is turned on or off. If set to **Y(es)**, iTools State/Country Validation will validate every new or updated address entered by a licensed user when the address is saved. In addition, all actions are available on the State/Country Validation tab. If set to **N(o)**, no validation processing will occur, and certain validation actions will not be available on the iTools State/Country Validation tab.

PreferredLanguage

Specifies the system-wide preferred language. If a language is selected, iTools will standardize all State and Country values to the value in the specified language.



Licensing

iTools State/Country Validation uses the Salesforce.com package licensing mechanism to control which users have access to its functionality. The features of State/Country Validation will only function for users that have been assigned a license to **both** iTools State/Country Validation **and** the iTools Configuration Manager.

When you installed the iTools State/Country Validation package, your organization was granted an unlimited number of licenses to the iTool. With unlimited licenses, Salesforce.com will automatically assign iTools State/Country Validation licenses to your users on your behalf. Because Salesforce takes care of license assignment, you will not see the Manage Licenses link for the iTools State/Country Validation package.

A license to the iTools Configuration Manager package is also required for a user to access the State/Country Validation iTool as well as all other iTools. However, unlike the unlimited licenses automatically applied to your organization for State/Country Validation, you must assign licenses for the iTools Configuration Manager to individual users. Your organization receives one Configuration Manager license for every iTools subscription it purchases. Users that have not been assigned an iTools Configuration Manager license may see some, but not all, of the State/Country Validation features. For example, a user without a license may see the address country code or validation status value on a detail page, but the validation process will **not** run when they make a change to an address. In addition, a user without a license will not be able to perform any actions on the State/Country Validation Page.

It is important for you, the System Administrator, to understand the features and functionality provided by iTools State/Country Validation and how the allocation of licenses impacts the user experience and success of the iTool in your organization.



Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.



Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time



Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST