

USER GUIDE

Address Validation for Creatio

v.1.0

Application Summary:

Data quality is the backbone of efficient operations, and accurate addresses are a crucial component of your Customer360 records. The Address Validation for Creatio application ensures real-time accuracy by leveraging trusted providers, preventing data errors before they disrupt your workflow and enhancing the user experience.

Application enables address validation using multiple address validation providers:

- Google Maps API
- USPS (United States)
- Postgrid (United Kingdom)
- Smarty (US and International)
- Egon (International)

With this tool, address verification is triggered automatically when an Account or Contact record is saved or updated, alerting users to any errors. You can also validate selected records and generate detailed reports on validation results, ensuring your data stays reliable and up-to-date.

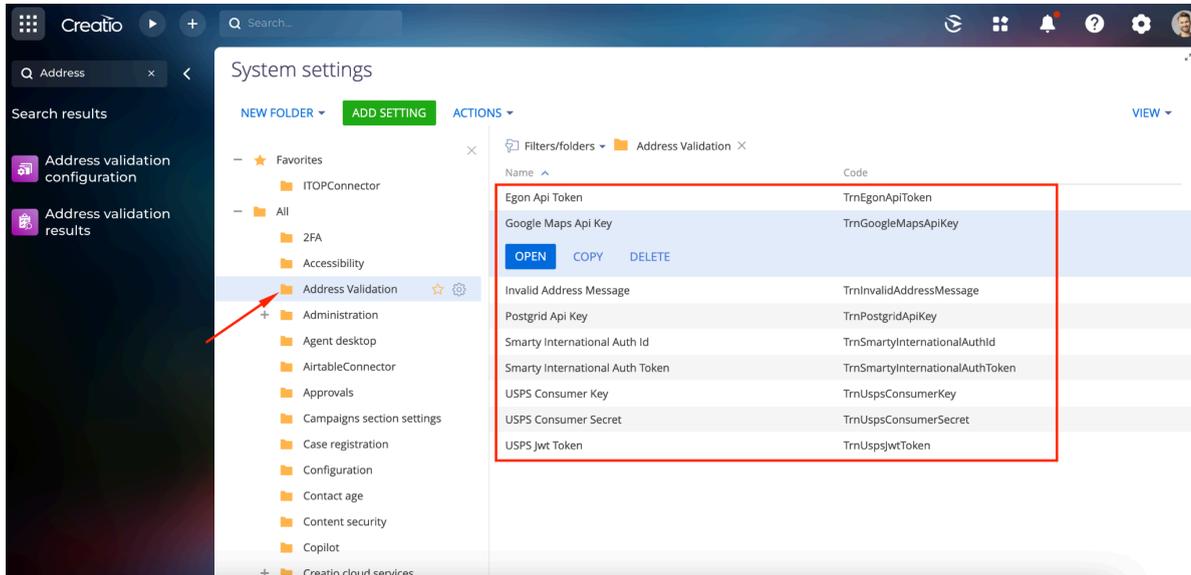
Administrator can choose whether to block invalid address saving or just display a user warning.

Process execution is available from Account and Contact sections on multiple records.

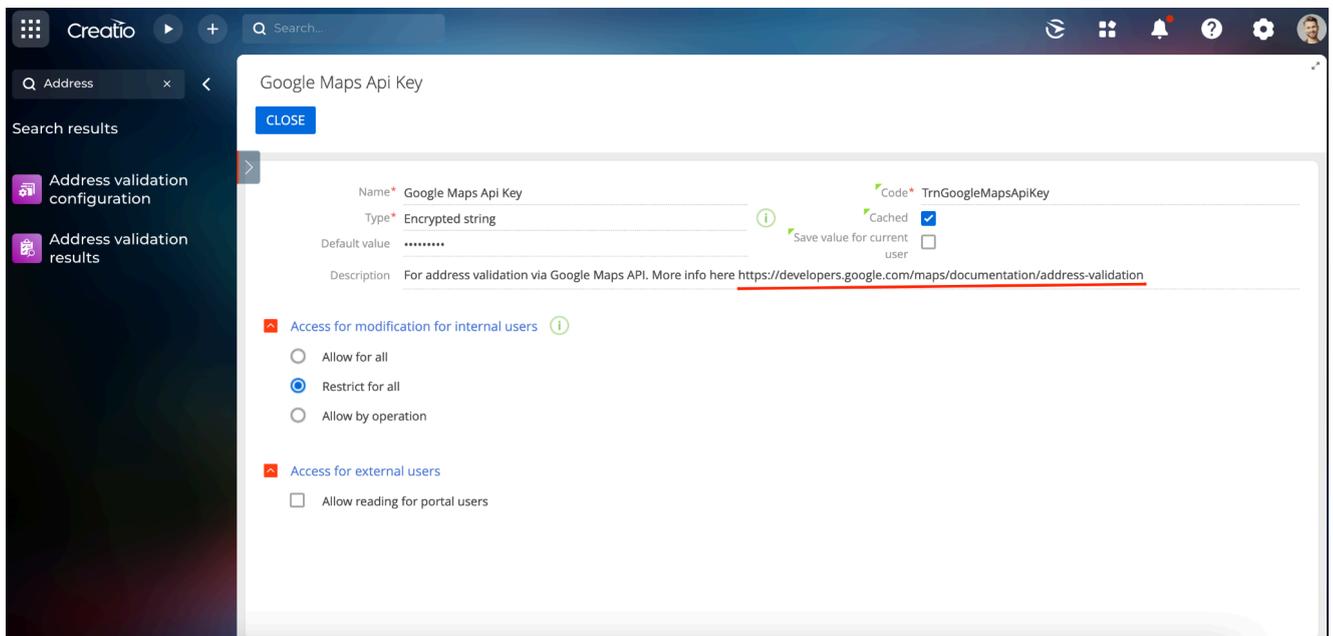
Administration

Configuring the validation providers

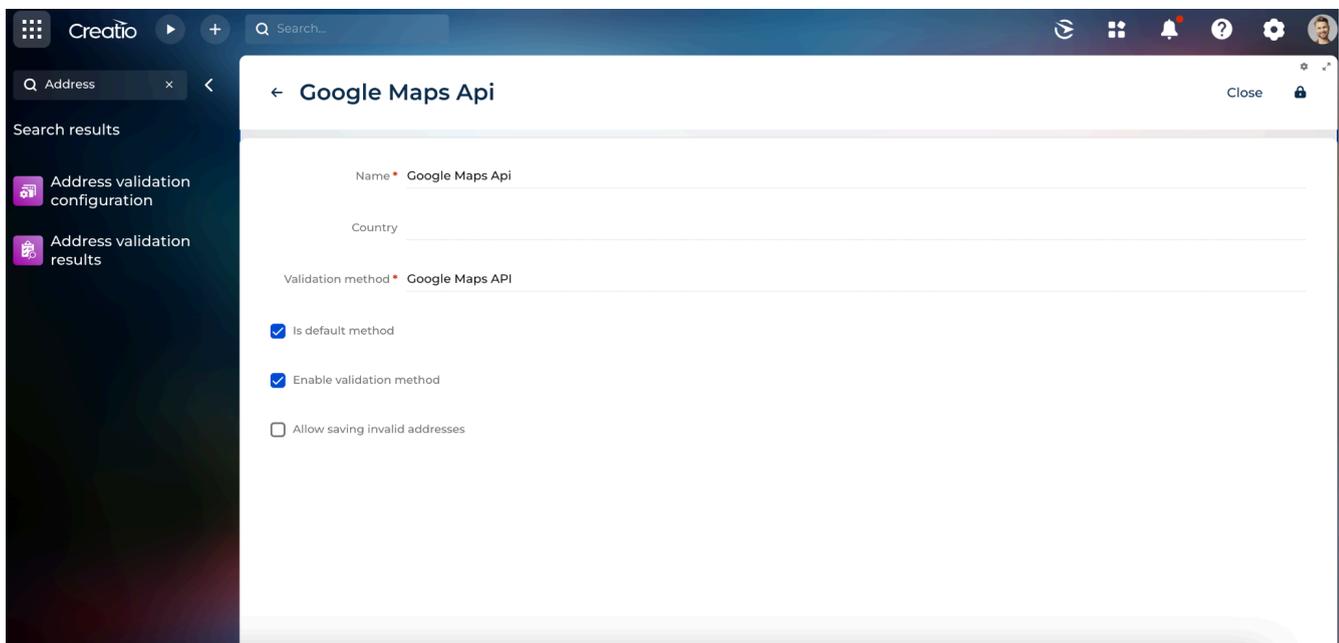
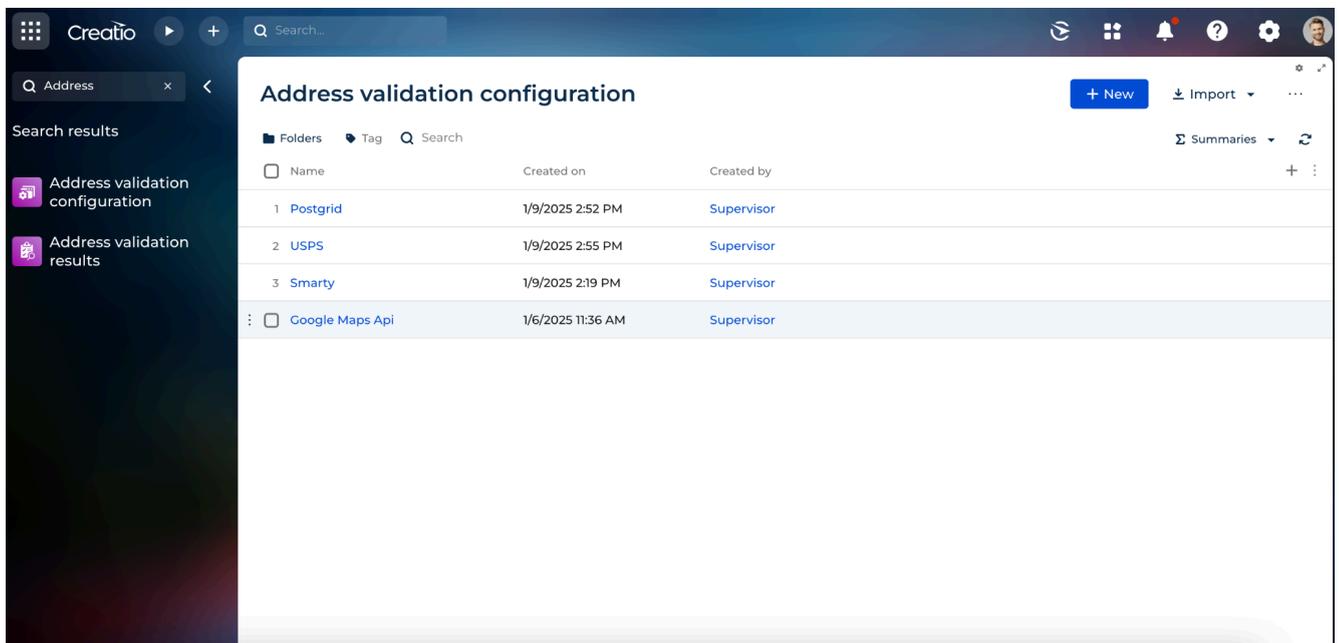
1. Navigate to **System settings**, then to the **Address Validation** folder, and fill in the secrets for one of the validation methods. For example, let's start with the **Google Maps API**.



Secrets (keys, tokens, passwords) for each validation method must be retrieved from the respective service accounts. The service URLs are listed in the **Description** field of each parameter, for example:



2. Open the **Address Validation Configuration** section and add settings for the selected address validation method.



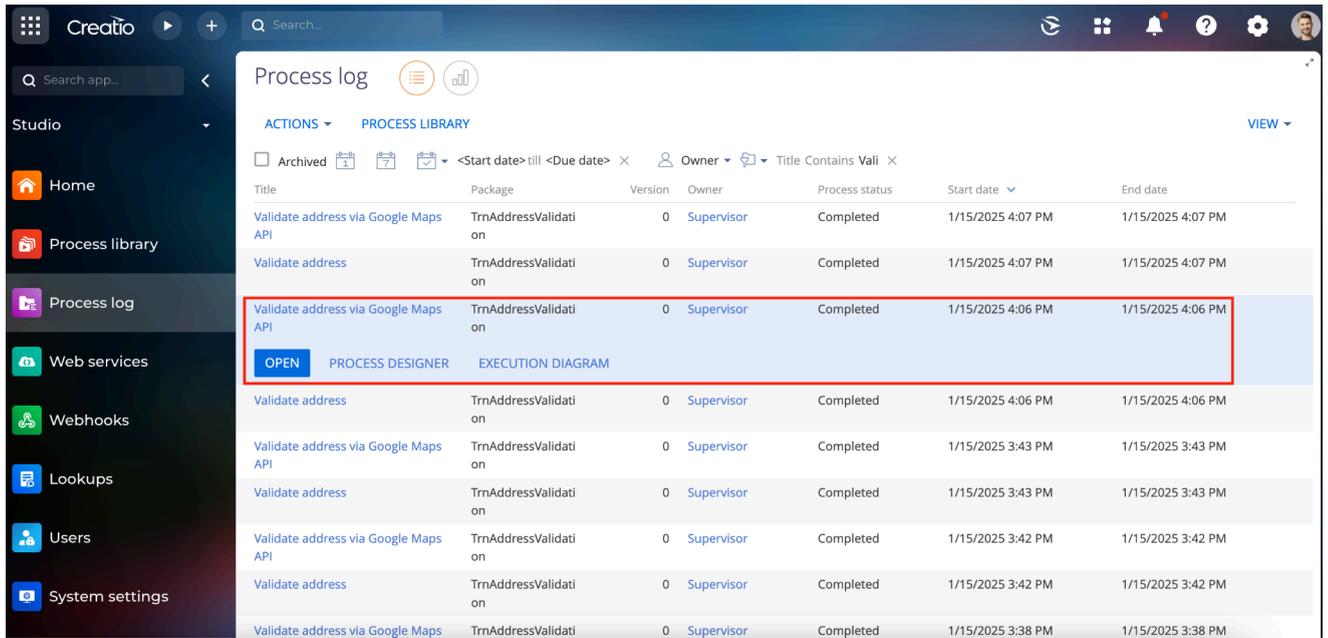
If you select a country, the method will only be applied to addresses in that specific country. You must either select a country or mark the method as the **Is default method**.

3. If necessary, you can add multiple configuration records for different validation methods. For example:
 - For the US, use **USPS**.
 - For Spain, use **Smarty International**.
 - For other countries, use **Google Maps API**.
 - For Google Maps API, do not select a country and mark it as the Is default method.
4. Verification service provider fees and subscription fees are not included in the price of this connector and must be purchased separately for the relevant services.

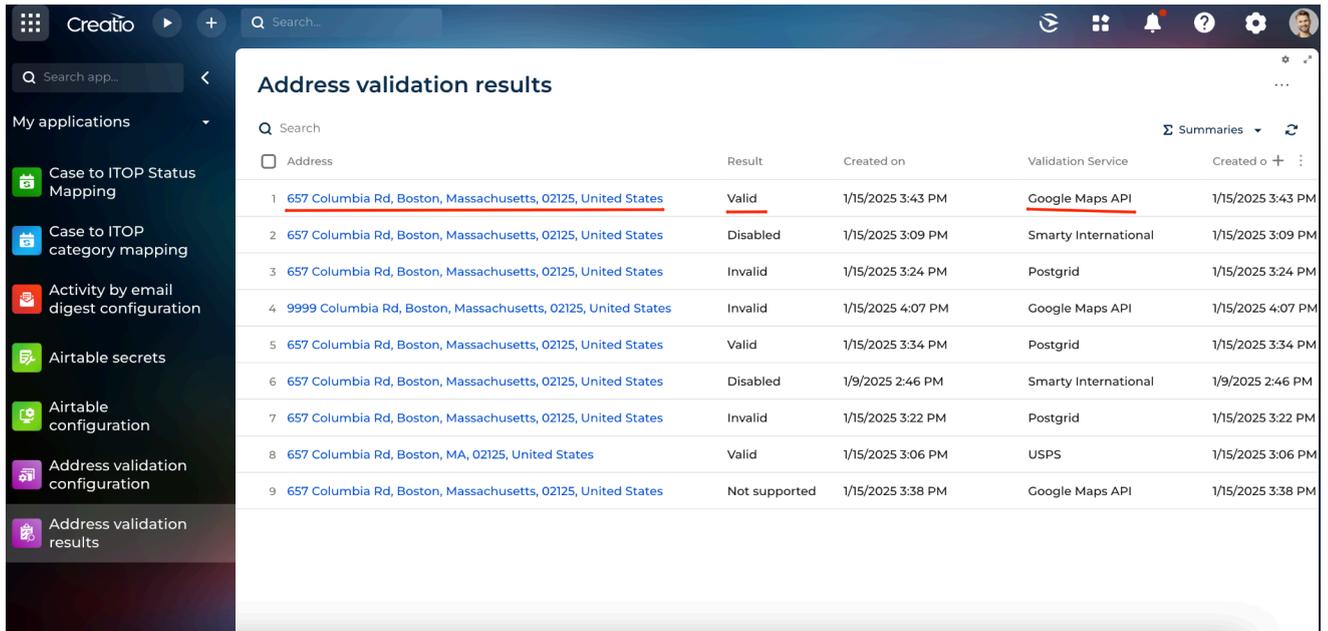
Troubleshooting

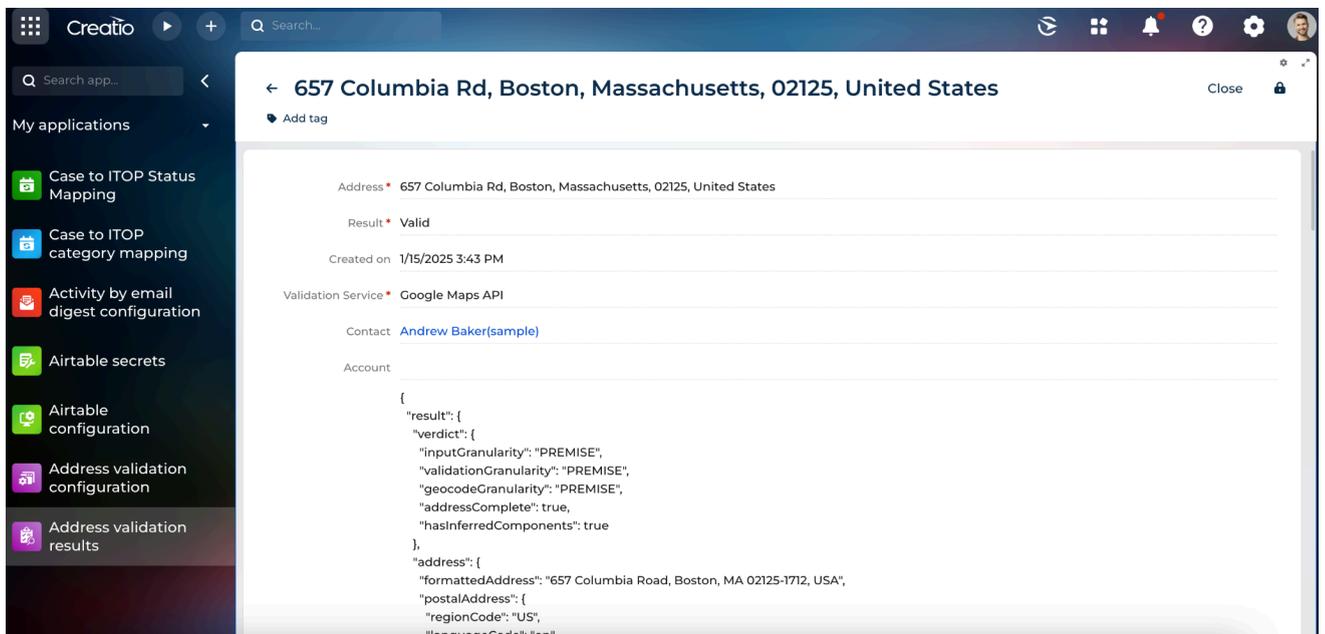
1. If something isn't working as described, check the **Process Log** to understand how the business process is being executed (e.g., whether it stops at a specific step). If there is an error, review the

details of the error.



2. All address validation attempts are logged in the **Address Validation Results** section.



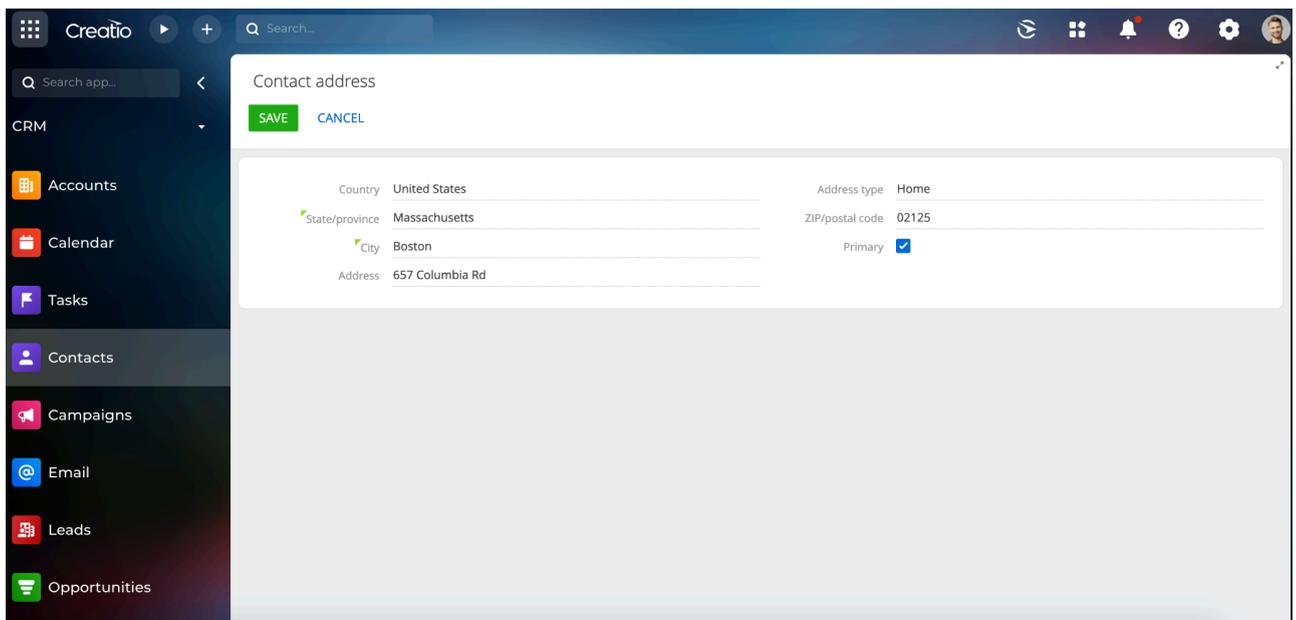


In the log entry, you can see which **Contact** or **Account** the validated address belongs to, the full address string, and the validation result (**Valid**, **Invalid**, **Not Supported**, **Disabled**). Using the API response, your system administrator can diagnose any issues.

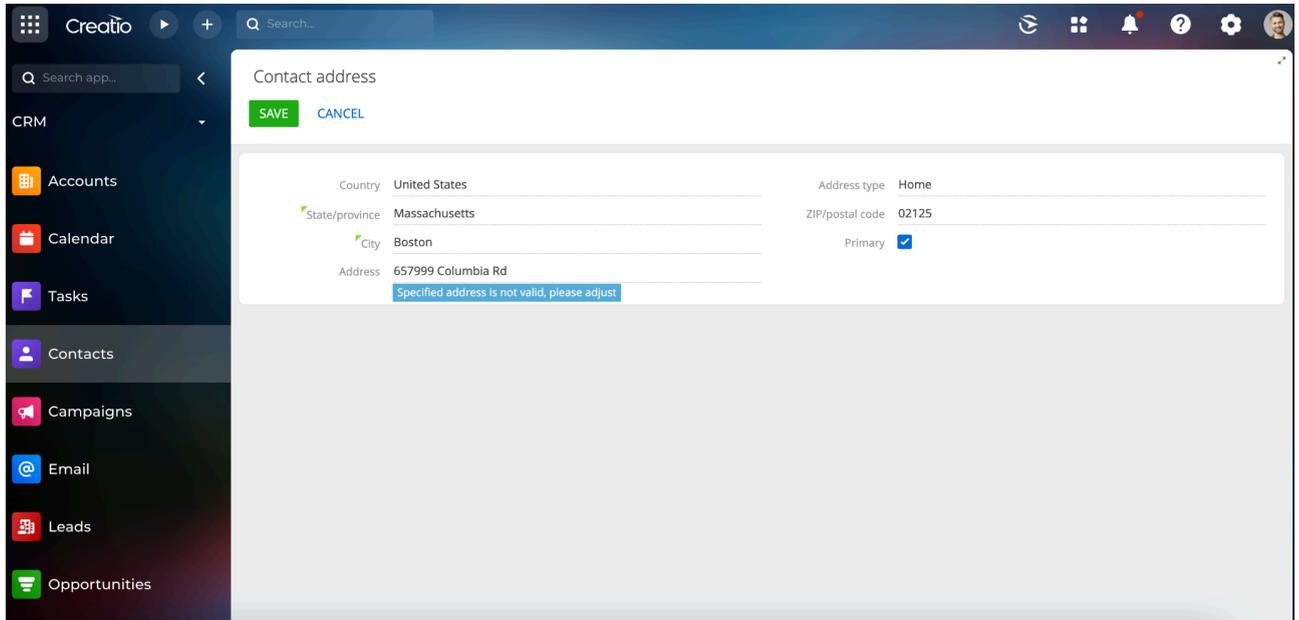
If you are unable to resolve the issue, contact the developer.

Using the validation

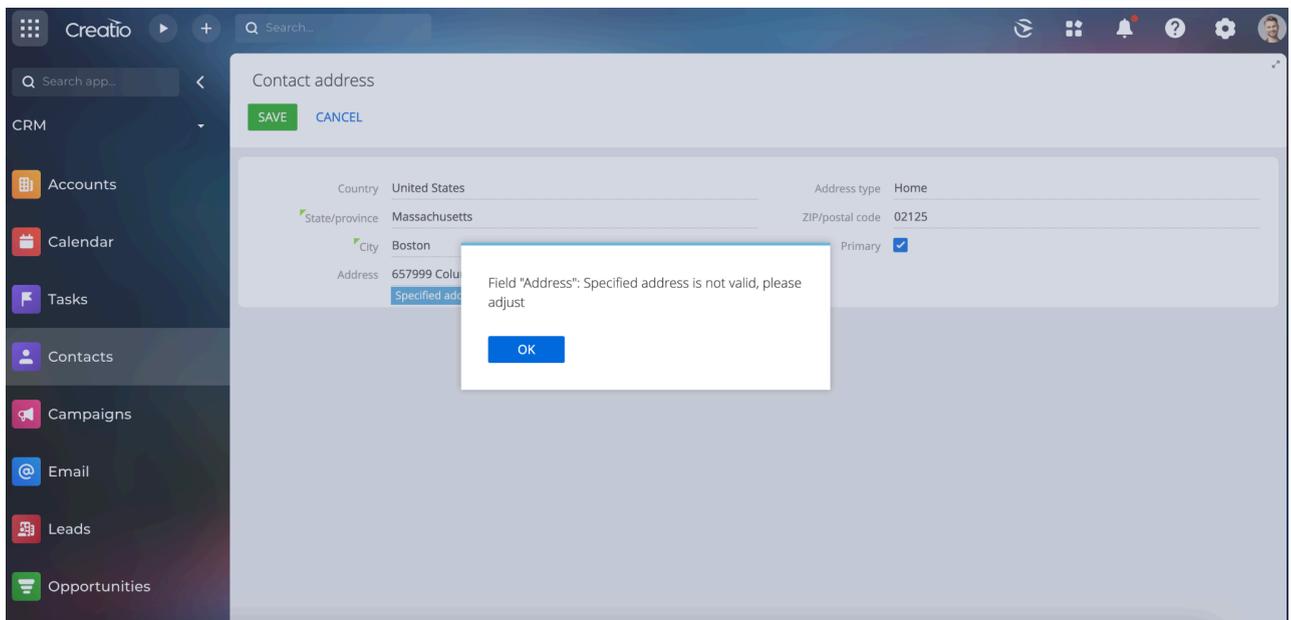
1. Open a contact in the **Contacts** section, then add a new address or edit an existing one. For valid addresses, there will be no error messages, and you can save the address.



For invalid addresses, an error message will appear after editing the **Address** field,



and the address cannot be saved (clicking the **Save** button will fail):



2. If the address is in an unsupported region (e.g., Ukraine for the Google Maps API), no error message will appear, and the address can still be saved.
3. If you enable the **Allow saving invalid addresses** checkbox in the validation method settings. The system will still display validation errors but will allow invalid addresses to be saved.

Developer contacts

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