

## Chapter 2

# CHAPTER 2 — CONFIGURING AND USING THE CCH SUREADDRESS COMPONENT

## Overview

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The SureAddress component of the plug-in integrates with multiple components of 365 Business Central, enabling addresses to be validated individually or in bulk. The 365 Business Central pages for which address validation is available are as follows:

- Company Information
- Location Page/List
- Customer Page/List
- Vendor Page/List
- Ship-to Address Page/List
- Order Address Page/List
- Bank Account Page/List
- Contact Page/List
- Responsibility Center Page/List
- Sales Quote, Order, Invoice, Credit Memo, Return Order, Blanket Order
- Purchase Quote, Order Invoice Credit Memo, Return Order, Blanket Order
- Service Quote, Order, Invoice, Credit Memo

This chapter details how to configure the SureAddress component and use it to validate addresses individually and in bulk.

## Configuring the SureAddress Component

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The CCH Address Validation Setup page allows you to configure settings for the SureAddress component of the plug-in. Open this page by searching for and selecting the CCH Address Validation Setup page. To configure the address validation component, do the following:

1. Select the **General** tab and configure the following settings:
  - ◆ **Address Validation URL:** Enter the URL for the SureAddress webservice URL.
  - ◆ **Address Client ID:** Enter the SureAddress client ID.
  - ◆ **Address Validation Key:** Enter the address validation key for the supplied client ID.

 **Note:** For security reasons, the validation key will be hidden after it is entered.

- ◆ **Min. Address Validation Score:** Enter a value between 0 and 1 for the minimum score necessary for returned addresses to automatically be accepted during batch validation and to be displayed during individual validation.

 **Note:** Recommended value is 0.95.

- ◆ **Disable Automatic Validation:** Select this if you want to disable the address validation that occurs when a record is saved. When this is selected, the only way to validate addresses is to select the page actions for address validation.
2. Select the **Country** tab and configure the following settings:
    - ◆ **Validate Blank Country:** Select this if you want to validate addresses when the country field is blank.
  3. Select the **Countries to validate** tab and configure the following settings:
    - ◆ **Countries to validate List:** Enter values in this list for the country codes to validate. If an address contains a country code that is not present in this list, then it will not be sent to SureAddress.
  4. Select the **Logging** tab and configure the following settings:
    - ◆ **Enable SOAP Tracing:** Select this if you want to log the webservice calls being made to SureAddress.
  5. Select the **Validate Credentials** action to validate the Address Client ID and Address Validation Key.

## Individual Address Validation

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You can perform individual address validation with this plug-in on various pages in Dynamics 365 Business Central.

1. For supported pages, you can validate individual addresses by selecting **Actions > Address Validation**, or by selecting **Save** for automatic validation. The CCH Address Validation page displays the Original and Validated Address.
2. On the CCH Address Validation page, select **Accept** to accept the validated address, or select **Reject** to continue with the Original Address.

## Batch Address Validation

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You can perform batch address validation on list pages within Dynamics 365 Business Central. To perform batch validation, do the following:

1. Select one or more records in a list.
2. Select **Actions > Validate > Address Validation Batch**.
3. A progress bar will display address validation progress.
  - ◆ When all records have been processed, a message box will indicate the number of processed and updated records.
  - ◆ An address is only updated if a matching address is returned that scores above the minimum threshold defined on the CCH Address Validation Setup page.

4. The CCH Address Validated field has been added to each list and indicates whether a given record has been validated and updated. User needs to set the SessionTimeout in the navsettings.json file up to 24:00:00 hrs.