

# SharpXRM By [SADAX Technology](#)

## Address Validation

### Installation & Configuration Guide

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#### Address Validation Pre-requisites

In order to use the Sharp XRM Address Validation, there are two important requirements:

- Sharp XRM Address Validation is only available for Microsoft Dynamics CRM Organizations running version 2015 (7.x) or 2016 (8.x).
- Sharp XRM Address Validation uses the Bing Map APIs to validate, confirm and complete the addresses. You must have a valid Bing API Key to perform address validation. A **Bing Maps API Key** can be generated from the [Bing Map Portal](#). It is required for Address Validation to work. The results returned by Bing Maps are outside our control.

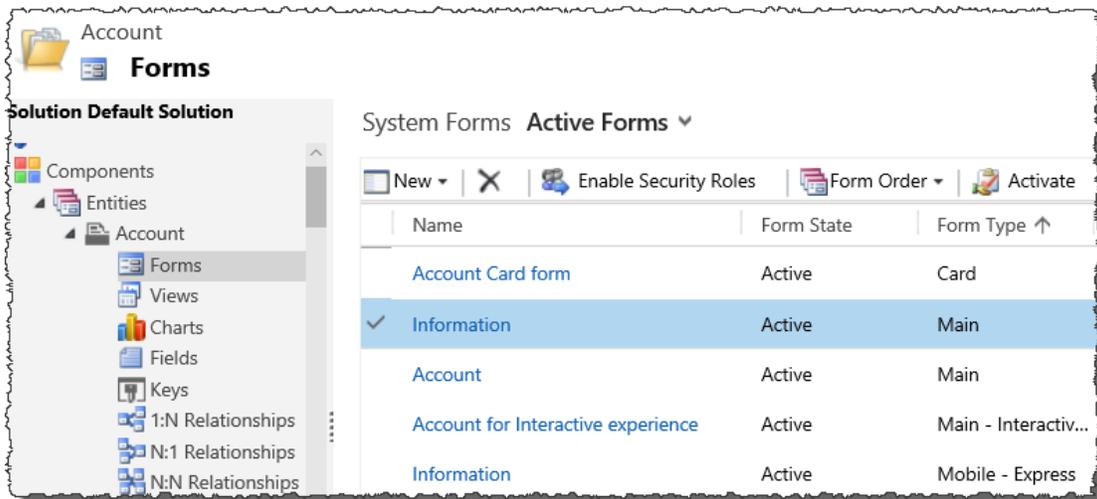
#### Downloading and Installation the Solution

1. Download the Sharp XRM Address Validation solution zip file for CRM 2015 or CRM 2016 from our [web site](#).
2. Import the Solution into your Microsoft Dynamics CRM organization by following these steps:
  - a. Navigate to Settings -> Solutions
  - b. Click on "Import Solution"
  - c. Click the "Browse" button and select the zip solution file downloaded in **Step 1**
  - d. Follow the instructions on the screen to import to Solution into your Microsoft Dynamics CRM organization

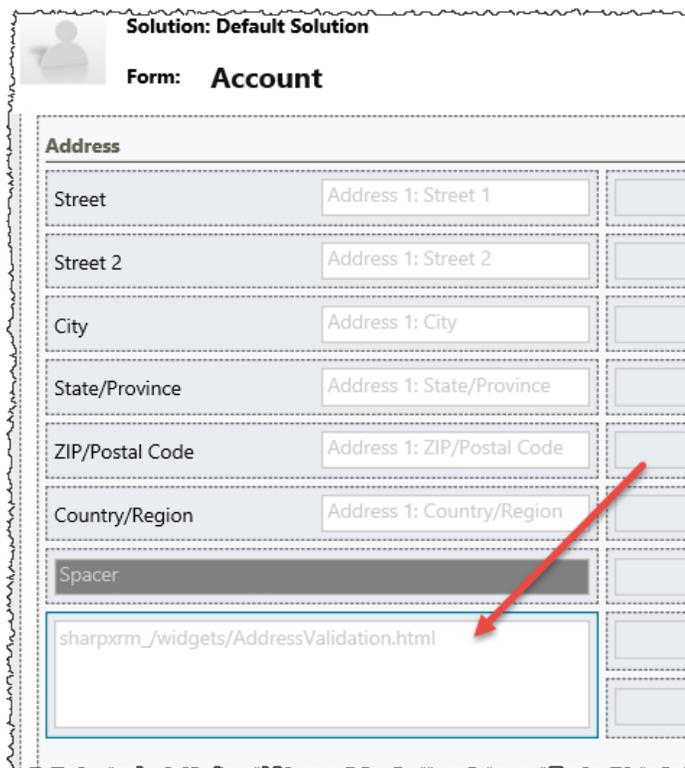
## Configure Address Validation for CRM entities

Sharp XRM Address Validation can be configured to validate addresses on any entity in CRM that contains address fields. In the configuration guide, we are using the account entity to demonstrate how it can be done. Follow the steps below to configure the address validation for an entity of your choice.

1. In the Default Solution (or any other unmanaged solution you are using), navigate to the Entity Form on which you want to display the address validation button



2. Add the Web Resource named “`sharp_xrm/_widgets/AddressValidation.html`” on the entity form for which you want to enable address validation.



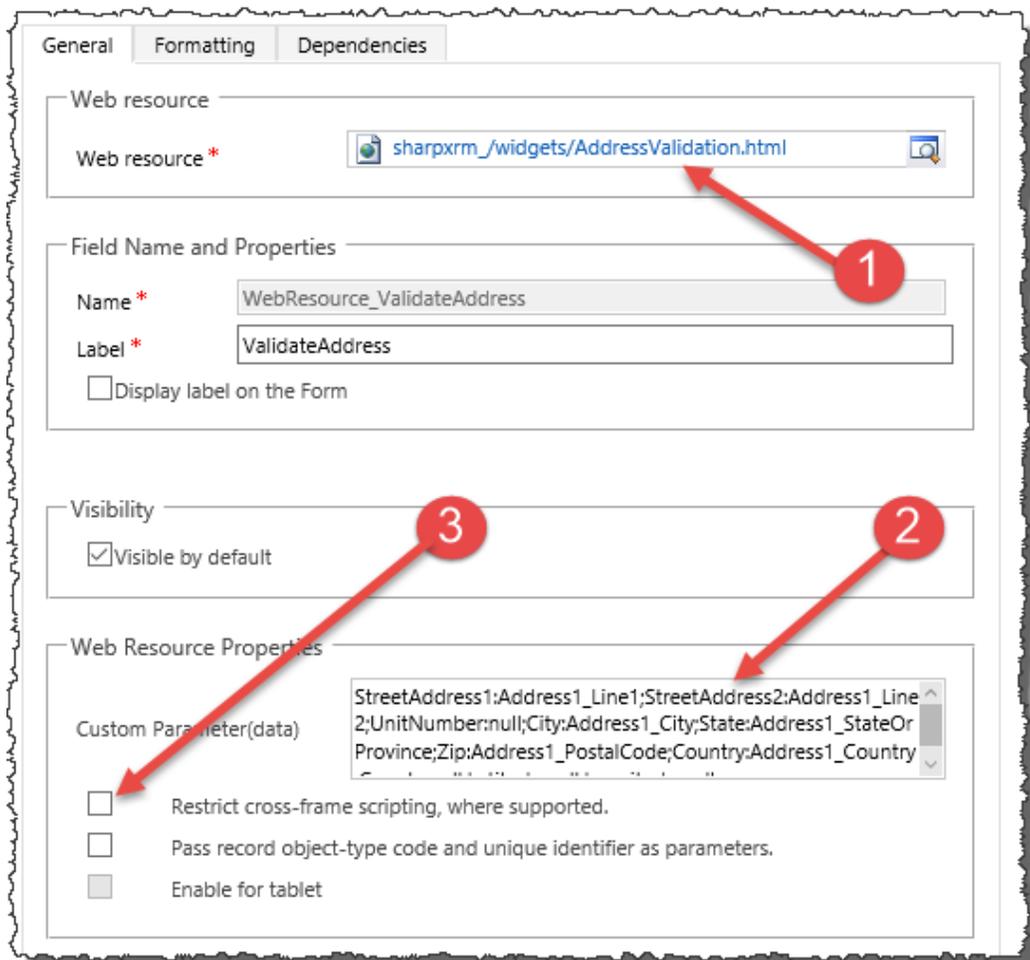
3. In the Custom Parameter section, indicate the fields used to capture the address on the entity.

As an example, for Account entity, we are using the following out of the box fields to capture the address:

Street Address 1: Address1_Line1	State: Address1_StateOrProvince
Street Address 2: Address1_Line2	Zip Code: Address1_PostalCode
Unit Number: Address1_Line3	Country: Address1_Country
City: Address1_City	Latitude: Address1_Latitude
County: <i>not tracked</i>	Longitude: Address1_Longitude

The corresponding syntax of the Custom Parameter will be as follows:

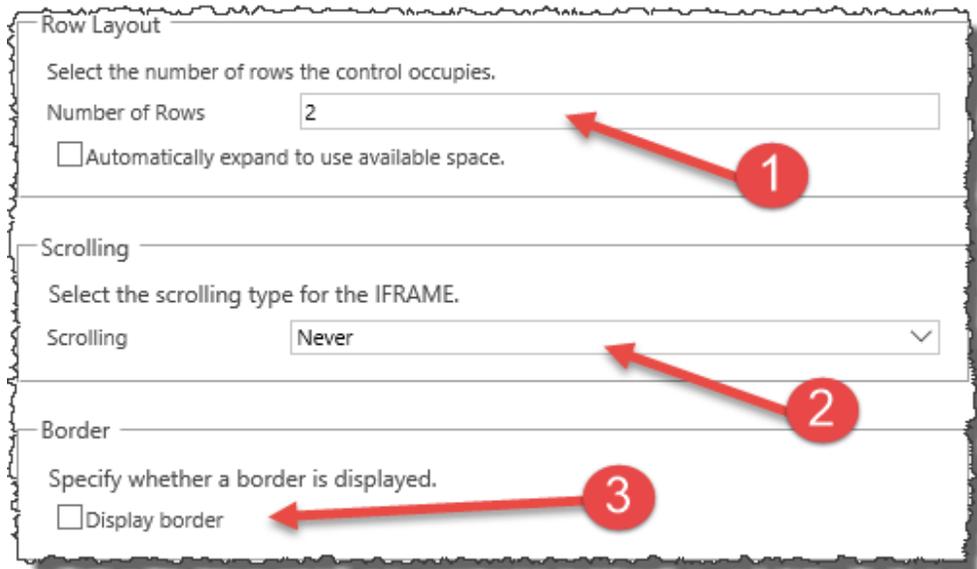
StreetAddress1:Address1\_Line1;StreetAddress2:Address1\_Line2;UnitNumber:Address1\_Line3;City:Address1\_City;State:Address1\_StateOrProvince;Zip:Address1\_PostalCode;Country:Address1\_Country;County:null;Latitude:Address1\_Latitude;Longitude:Address1\_Longitude;



- It is important to use the fields' **schema names** (case sensitive), not their **logical names** (lower case).
- For untracked address fields, you must provide "**null**" as the value (e.g. "County" above).
- All address fields must be text fields except for the Latitude and Longitude (numbers)

In the Formatting Tab, select the following options

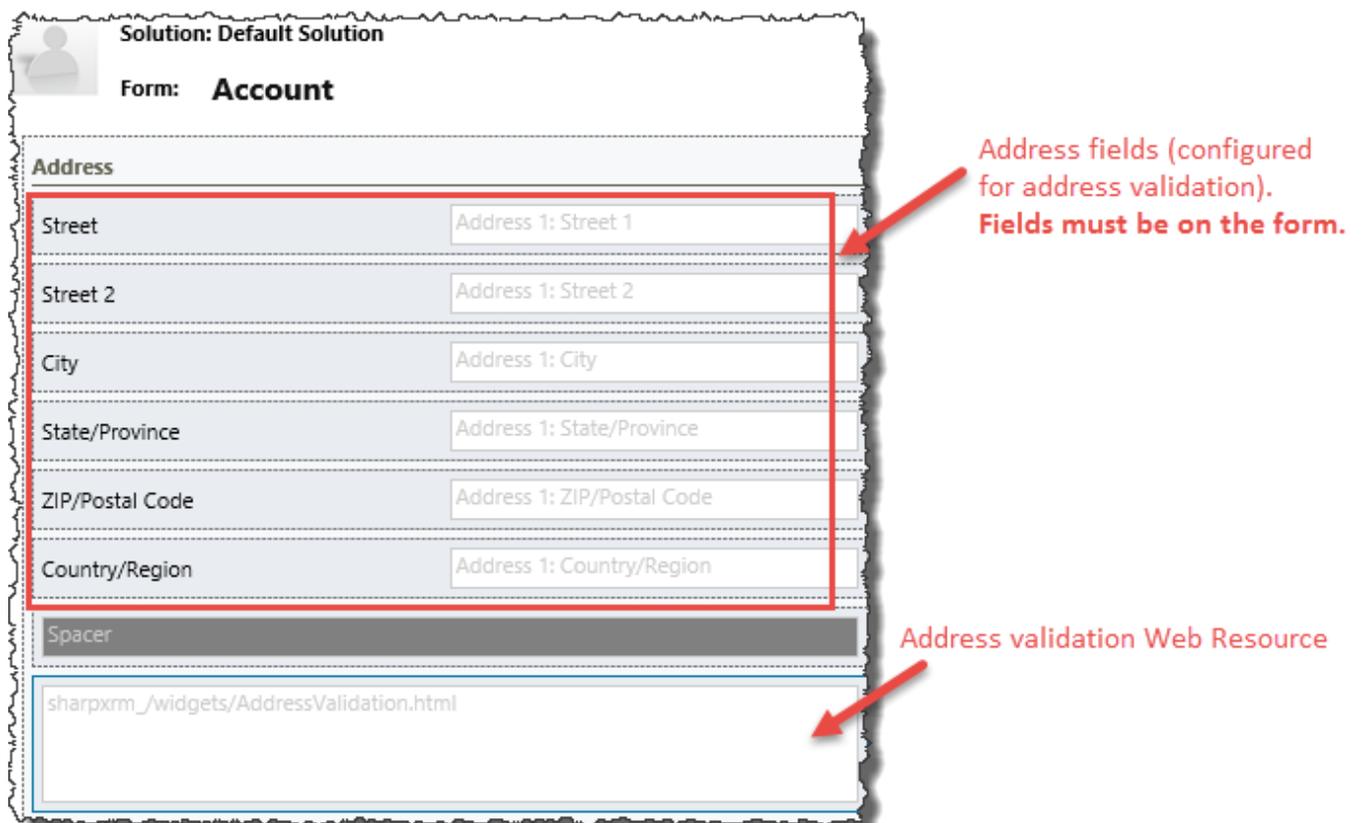
- **Number of Rows:** 2
- **Scrolling:** Never
- **Display Border:** Unchecked



The screenshot shows the 'Formatting Tab' configuration panel with three red arrows pointing to specific settings:

- 1** points to the 'Number of Rows' input field, which contains the value '2'.
- 2** points to the 'Scrolling' dropdown menu, which is set to 'Never'.
- 3** points to the 'Display border' checkbox, which is unchecked.

4. All address fields specified in the custom parameters (step 3) **must be** present on the CRM form.



The screenshot shows a CRM form for 'Account' with the following address fields highlighted by a red box:

- Street
- Street 2
- City
- State/Province
- ZIP/Postal Code
- Country/Region

Below the address fields is a 'Spacer' and a 'Web Resource' field containing the URL: `sharp_xrm_widgets/AddressValidation.html`.

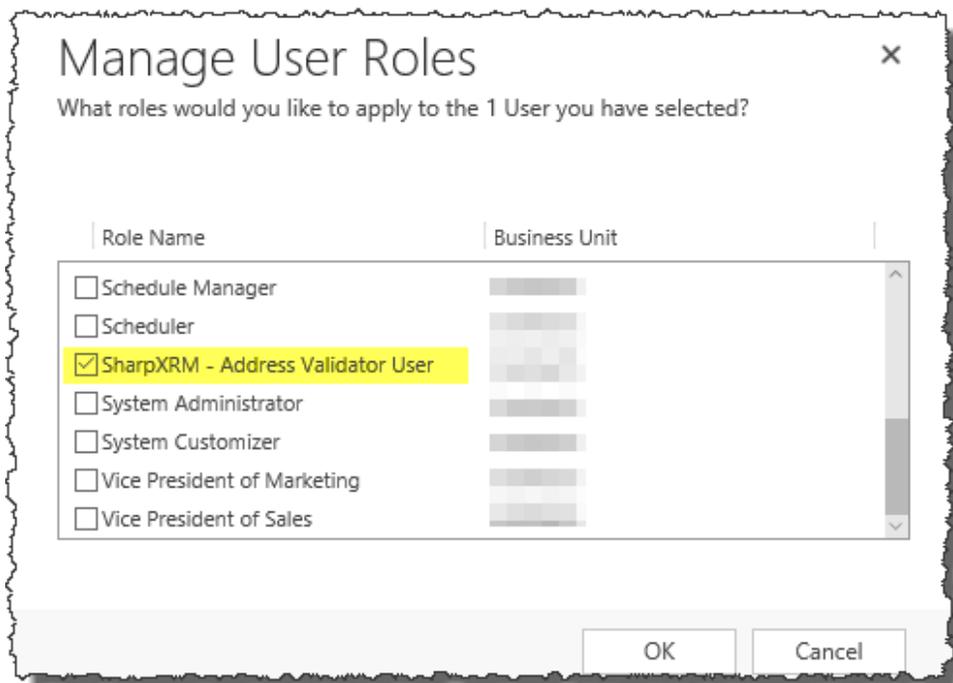
Red arrows and text annotations point to these elements:

- An arrow points from the text "Address fields (configured for address validation). Fields must be on the form." to the red box around the address fields.
- An arrow points from the text "Address validation Web Resource" to the Web Resource field.

5. Save and publish the form
6. Using Advanced Find, create a **Sharp XRM Configuration** record and add a Bing Map API Key (you can generate one from the [Bing Map Portal](#))



7. Assign the Security Role named “**SharpXRM - Address Validation User**” to users what should be allowed to perform address validation.



The “**SharpXRM – Address Validation User**” security role simply gives users the ability to read records from the SharpXRM Configuration entity. This privilege can be added to another security role to make the deployment of Address Validation easier. Only do this if you know what you are doing.