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# **UPS Address Validation**

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IMPORTANT: UPS has deprecated access key authentication in favor of an OAuth 2.0 security model and REST API. Beginning June 3, 2024, access keys will no longer be supported for authentication to any UPS APIs. For updated configuration information, please refer to <u>UPS Address Validation REST</u> <u>API Configuration</u>.

## Overview

UPS Address Validation adds the ability to validate addresses with UPS. Addresses are validated on the Customer Address Card and the Ship To Address on a Sales Document.

**Note:** This functionality requires an additional DLL to use. Please contact SalesPad Support to request the DLL for your build of SalesPad.

## Settings, Security & Setup

## Settings Setup

- 1. Navigate to Settings and locate the Address Tools section
- 2. Select UPSAddressQueryHandler from the list of Address Query Handlers

4	Addr	ess To	ols	
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Address Query Countries To Validate	UNITED STATES, USA, US, CANADA, CA, NONE
Address Query Handlers	UPSAddressQueryHandler
Address Validation Use Country Code	True
ZipCode Query Handlers	

- 3. Locate the UPS Validation section under settings
  - ⊿ UPS Validation

UPS Validation						
UPS Password	Company of the Compan					
UPS User Name	and the second se					
UPS Validation Access License Number						
UPS Validation Shipper Number	10002210					

- 4. Fill out each field with UPS Credentials (all are required)
- 5. A Shipper Number associated with the UPS User Name is required for Address Validation outside of the United States and Puerto Rico
- 6. Click Save and Log Off

#### Usage

### **Customer Address Card**

1. Navigate to a Customer Address Card

🙇 Customer Searc	h 🗵 👃 Customer: [AMBIGUOUSADDR01] Ambiguou	s Address Test 🗴	:	Contact: PRIMARY/test 🔀			
📑 Close 🛛 🛃 Sav	/e						
Customer ID:	AMBIGUOUSADDR01	Customer Name:	Ambig	uous Address Test			
Address							
Code:	PRIMARY						
Alt Comp. Name:							
Contact Name:	test						
Address:	02 S LOS ANGELES ST						
	LOS ANGELES, CA 90003						
Zip:							
City:	LOS ANGELES	S	tate:	CA			
Country Code:	US	▼ C	ountry:	United States			

- 2. Click **Save** when ready to save the Customer Address
- 3. The address is now validated with UPS, an address can be: Invalid, Valid, or Ambiguous
  - 1. If an address is Valid, a message displays indicating success
  - 2. If Invalid, a message displays indicating an invalid address and asks if the user would like to flag this address as valid
    - 1. If yes, the address is now marked as valid and UPS Address Validation will not be ran on future saves
    - 2. If no, a form appears to select/edit addresses suggestions
  - 3. If Ambiguous: a message is displayed if the user would like to be shown suggestions
    - 1. If yes, a form appears to select/edit addresses suggestions
      - 1. Pressing **Cancel** will keep the original address
      - 2. Pressing **OK** will use the selected address and run UPS Address Validation on the new address
    - 2. If no, a message displays and asks if the user would like to flag this address as valid
      - 1. If yes, the address is now marked as valid and UPS Address Validation will not be ran on future saves

<b>1</b>	UPS Address Validation ×
Suggested Add	resses
# .	Address
1	3300-3348 W 1ST ST LOS ANGELES, CA 90004
2	3301-3349 W 1ST ST LOS ANGELES, CA 90004
3	3350-3398 W 1ST ST LOS ANGELES, CA 90004
4	3351-3399 W 1ST ST LOS ANGELES, CA 90004
5	3400-3428 W 1ST ST LOS ANGELES, CA 90004
6	3401-3429 W 1ST ST LOS ANGELES, CA 90004
7	3426 W 1ST ST LOS ANGELES, CA 90004
8	3426 W 1ST ST APT 101-106 LOS ANGELES, CA 90004
	Cancel

#### Sales Document Addresses Formlet

1. Navigate to the Addresses Formlet on a new or open Sales Document

🔱 Customer S	earch 🗙 🌡 Custor	mer: [AAF	RONFIT0001] A	aron Fitz	Electrical 🗶 🗋 (QU	OTE) QTEST 1	024 🗙			
📑 Close 🛛 📙	Save 🛛 🍪 Print 👘		样 Delete	Cop	y 🛛 🏄 Dynamics GP					
Document Pro	perties									
Document #:	QTEST1024									QUOTE
Customer #:	AARONFIT0001									Aaron
Cust PO:									Sale	s Rep:
Reg Ship:								•	Sale	s Terr:
Ship Method:	LOCAL DELIVERY							•	Pay	Terms:
Whse:	WAREHOUSE							•	Doc	Date:
Currency:	Z-US\$							Ŧ	Crea	ated By:
Line Items	Notes Addresses	Holds	User Fields	Audit	Related Documents	Purchases	Quick Report	FedEx Quote	Email	Audit
Ship To Addre	ESS						·			

- 2. Click **Save** when ready to save the document
- 3. The Ship To Address is now validated with UPS. An address can be: Invalid, Valid, or Ambiguous
  - 1. If an address is Valid: a message displays indicating success
    - 2. If Invalid: a message displays indicating an invalid address and asks if the user would like to flag this address as valid
      - 1. If yes, the address is now marked as valid and UPS Address Validation will not be ran on future saves
    - 3. If Ambiguous: a message is displayed if the user would like to be shown suggestions
      - 1. If Yes, a form appears to select/edit addresses suggestions (shown next page)
        - 1. Pressing **Cancel** will keep the original address
        - 2. Pressing  $\mathbf{OK}$  will use the selected address and run UPS Address Validation on the new address
      - 2. If no, a message displays and asks if the user would like to flag this address as valid
        - 1. If yes, the address is now marked as valid and UPS Address Validation will not be ran on future saves

**Note:** Only addresses in USA and Puerto Rico are given address suggestions for ambiguous addresses. An address is treated as Invalid until UPS Address Validation is successful or the user flags the address as Valid. Editing an address in any way results in UPS Address Validation to run again.