**NuSoft Auto Complete**

Version 8

**Installation and Configuration Guide**

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# **Introduction**

This document is a guide for Microsoft Dynamics CRM users to learn how to install and configure the NuSoft Address Auto Complete product.

NuSoft Address Auto Complete provides address suggestions as the user types in the address field, and then populates the address attributes once a suggestion is selected. The product is an addition to the address field of **Account**, **Contact**, and **Lead** forms. This prevents inconsistencies with abbreviations and allows for easy input.

# **Requirements/Compatibility**

NuSoft Address Autocomplete requires the NuSoft Common solution to run, and is compatible with CRM 2016.

* Internet Explorer 8+
* Chrome 43+

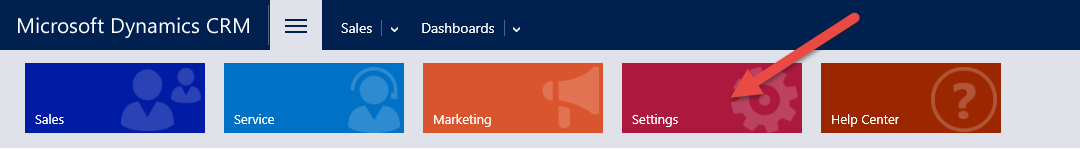
NuSoft Address Auto Complete may work on previous browser versions, but the mentioned versions have been tested and are known to work.

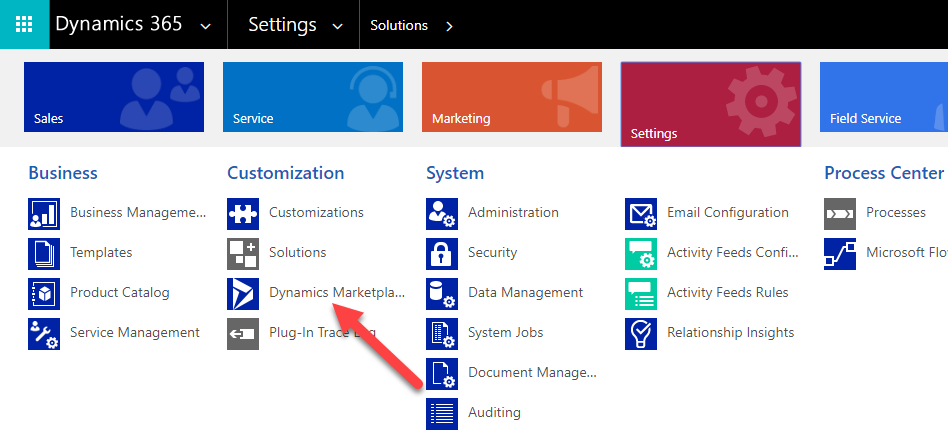
# **Installation**

NuSoft Address Auto Complete is a Microsoft Dynamics CRM Managed Solution. NuSoft recommends creating a backup solution before importing any solutions, and then importing the backup into CRM after the solutions have been imported.

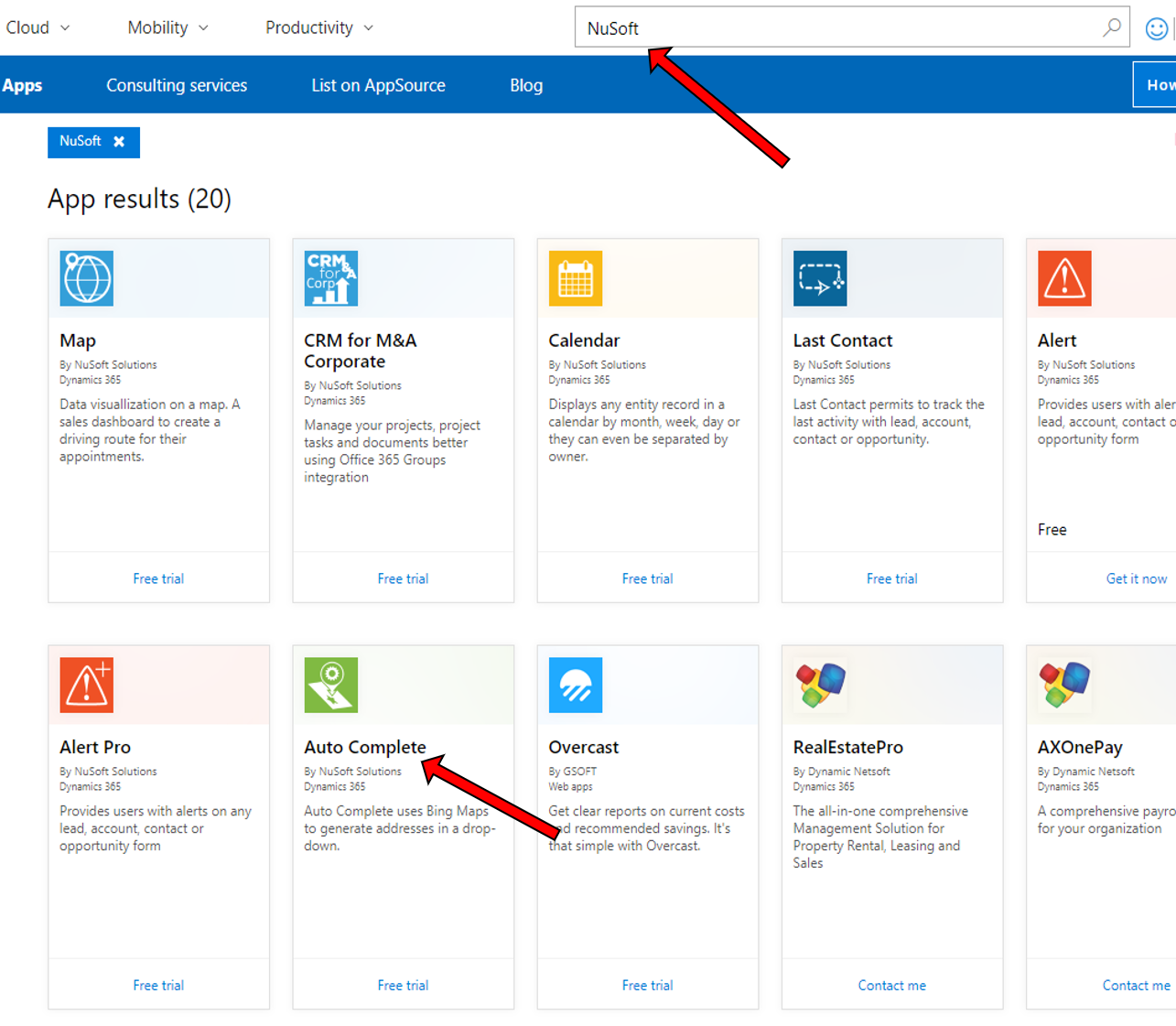
To install NuSoft Address Auto Complete and NuSoft Common, follow the steps below:

1. Navigate to **Settings -> Dynamics Marketplace**

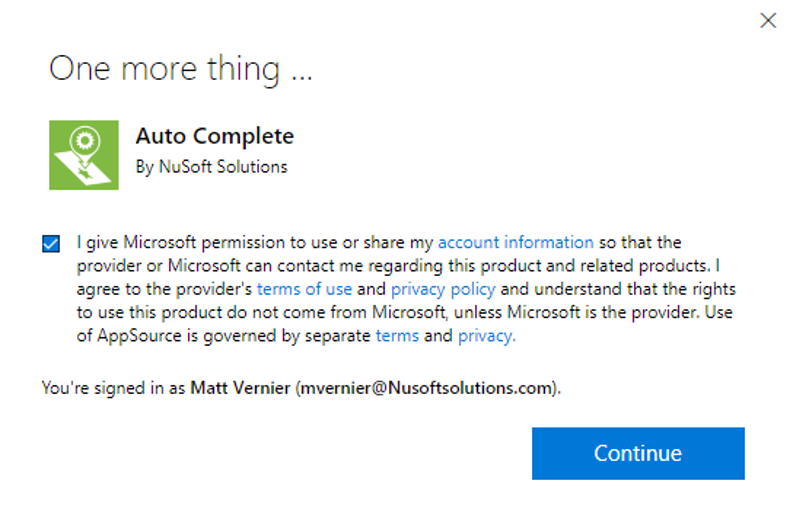




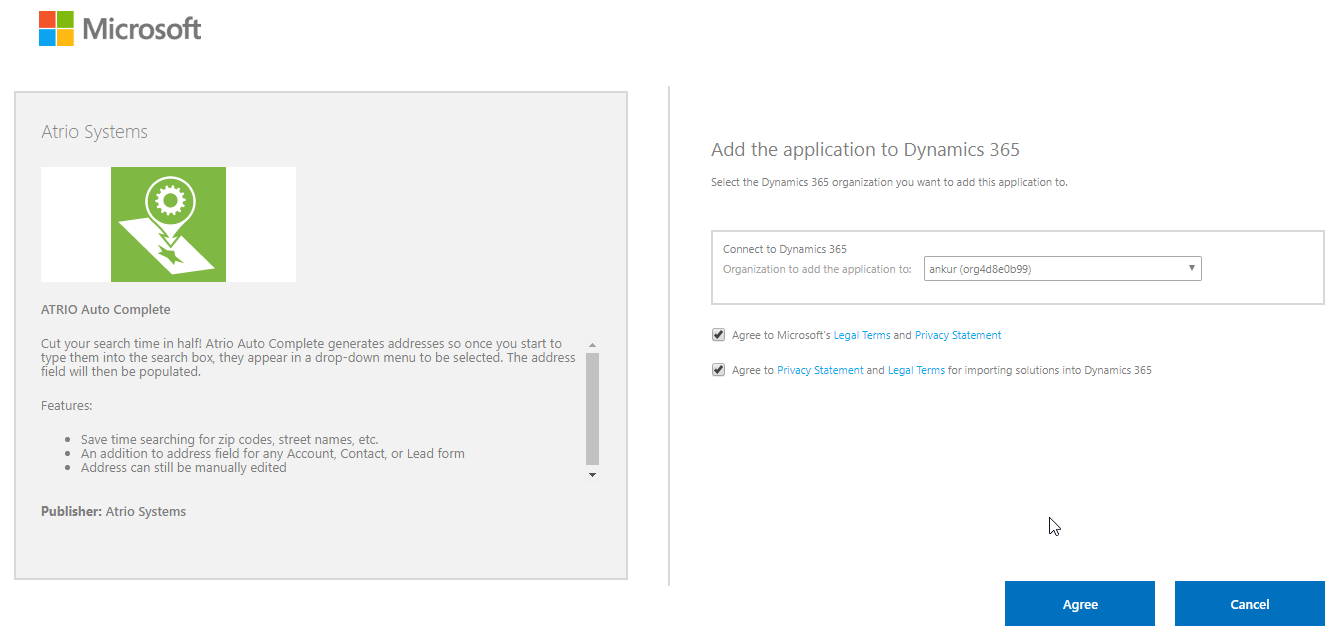
1. Enter **“NuSoft”** in the search box and click on “**Get it Now**” for **NUSOFT Auto Complete.**



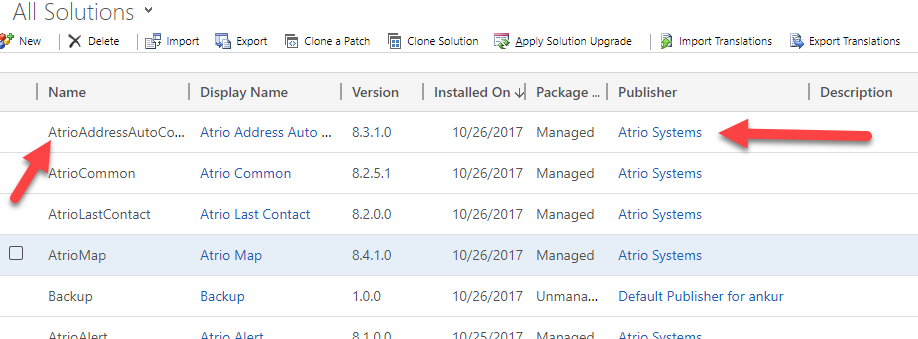
1. Check the box and click **Continue**



1. Agree to the conditions and click **Agree**



1. Come back to **Settings > Solutions > All Solutions** records page after the installation has completed, **NUSOFT Auto Complete** solution file should show up in the records.



# **Set Up**

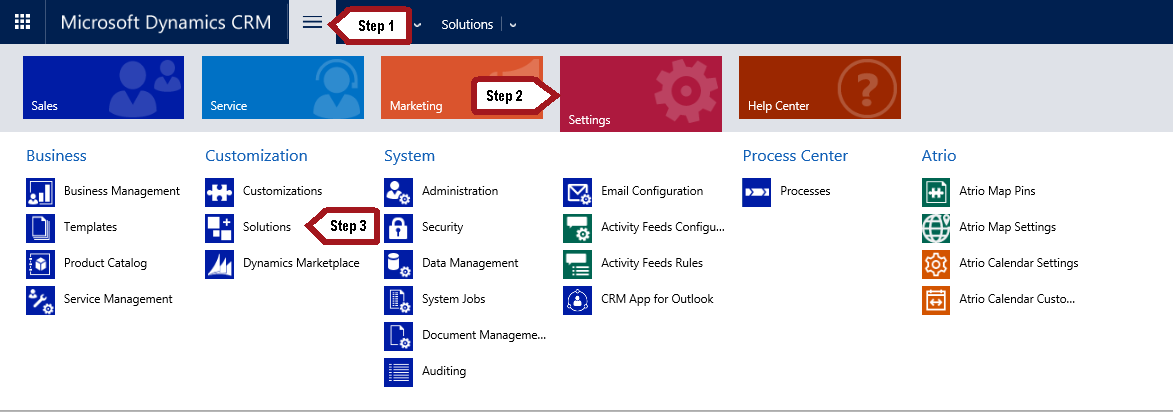
NuSoft Address AutoComplete requires 3 parameters:

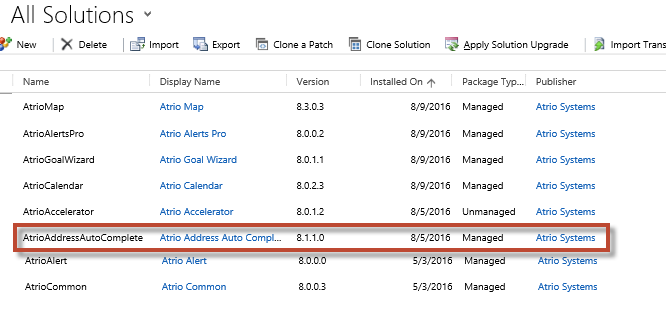
* **Bing Maps Key** Required
* **Country Format** Optional **ISO2** or **CountryName** (Default)
* **Product Key** Required After 30 Days

Bing Keys

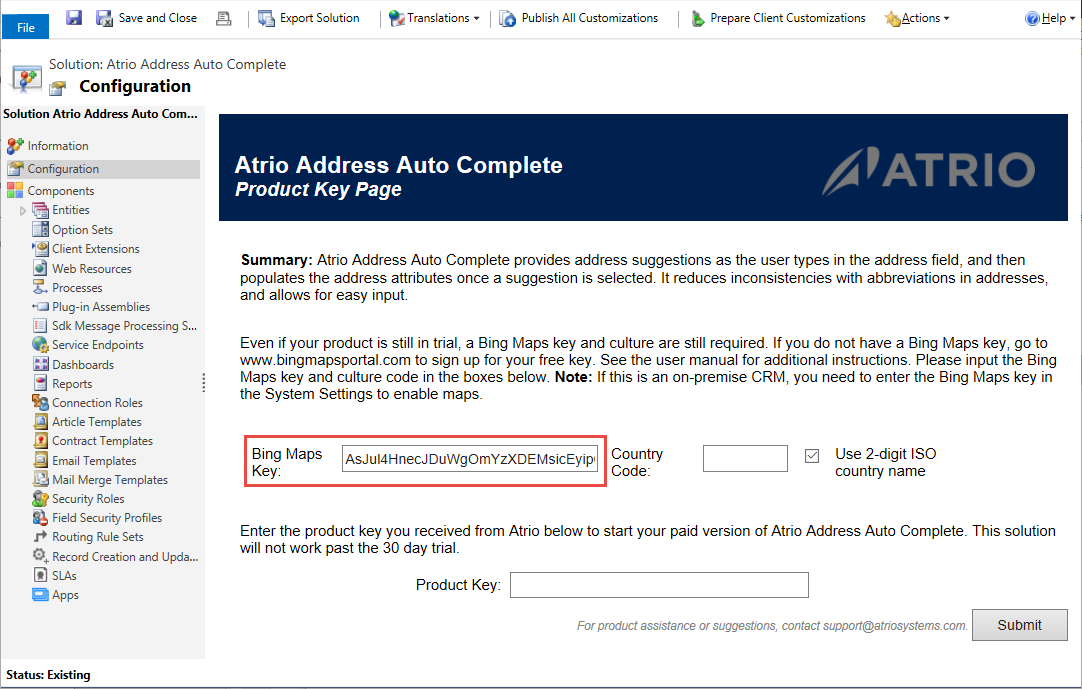
Entering in the Bing Maps Key has two separate steps depending if the CRM is online, or on-premise. If you need a Bing Maps key, go to [www.bingmapsportal.com](http://www.bingmapsportal.com) to sign up for one.

*Online CRM*

1. Navigate to **Settings -> Solutions**
2. Select the **NuSoft Address Auto Complete** solution.



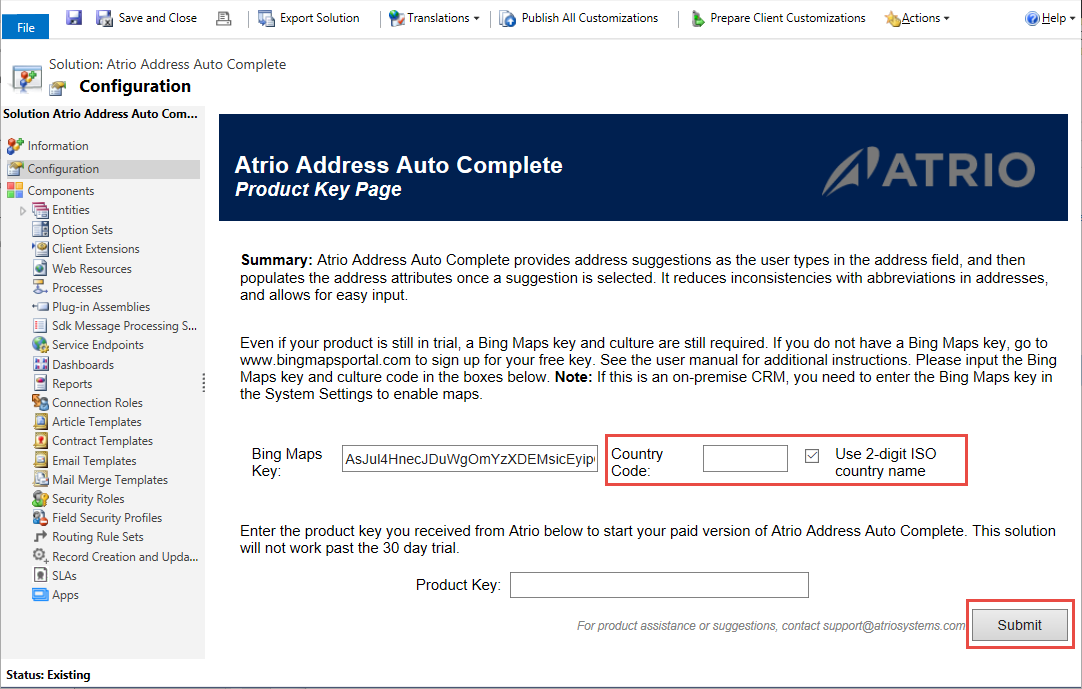
1. A **Configuration Page** will appear. Enter a Bing Key.



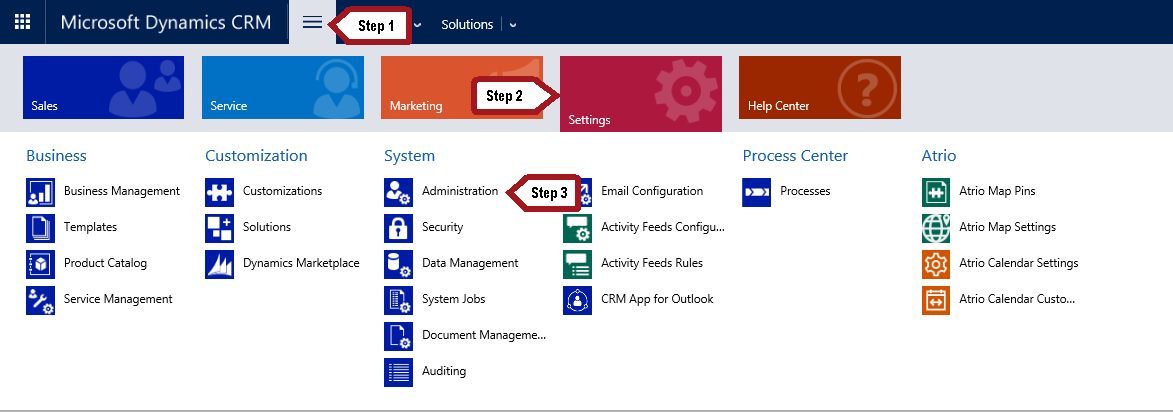
1. Put in your Bing Key and Country code in the text box. Click Submit after that.

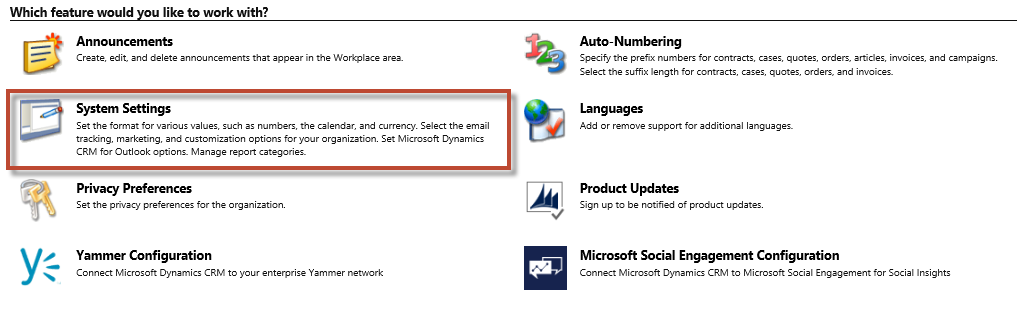
Acceptable country code formats are:

* + **CountryName**. Fill country field using name of country. i.e. Canada.
  + **Use 2-digit ISO country name**. Check mark this to return two letters in the resulted address. i.e. CA.



*On-Premise CRM*

1. Navigate to **Settings -> Administration.** 
2. Select **System Settings**.



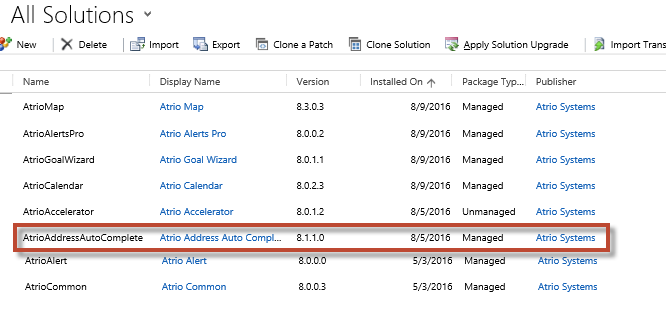
1. Under the **General** tab will be the **Enable Bing Maps** settings. Enter your Bing Key here.



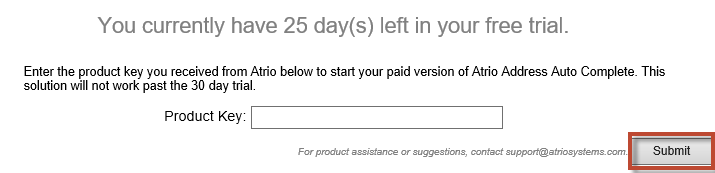
Product Key

After 30 days of use, NuSoft Address Auto Complete will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **NuSoft Address Auto Complete** solution.



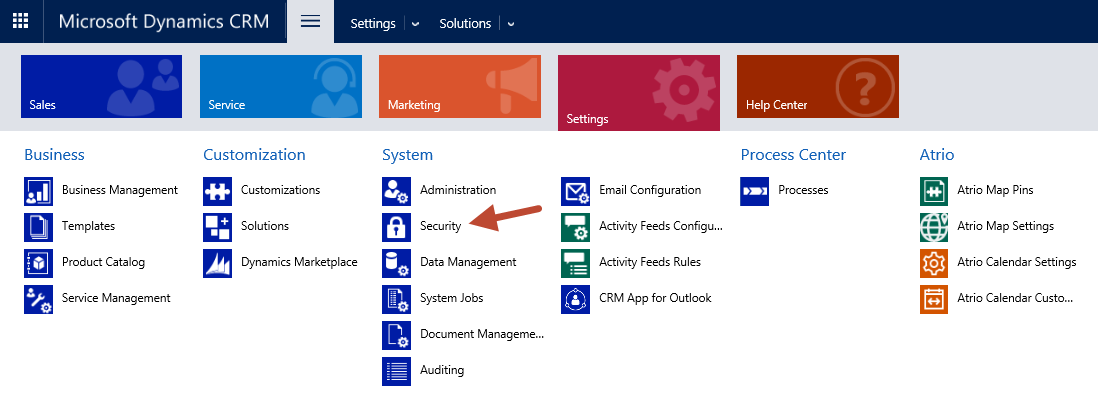
1. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from NuSoft and click **Submit**. If you do not have a product key, contact NuSoft at [support@nusoftsolutions.com](mailto:support@atriosystems.com) to receive one.

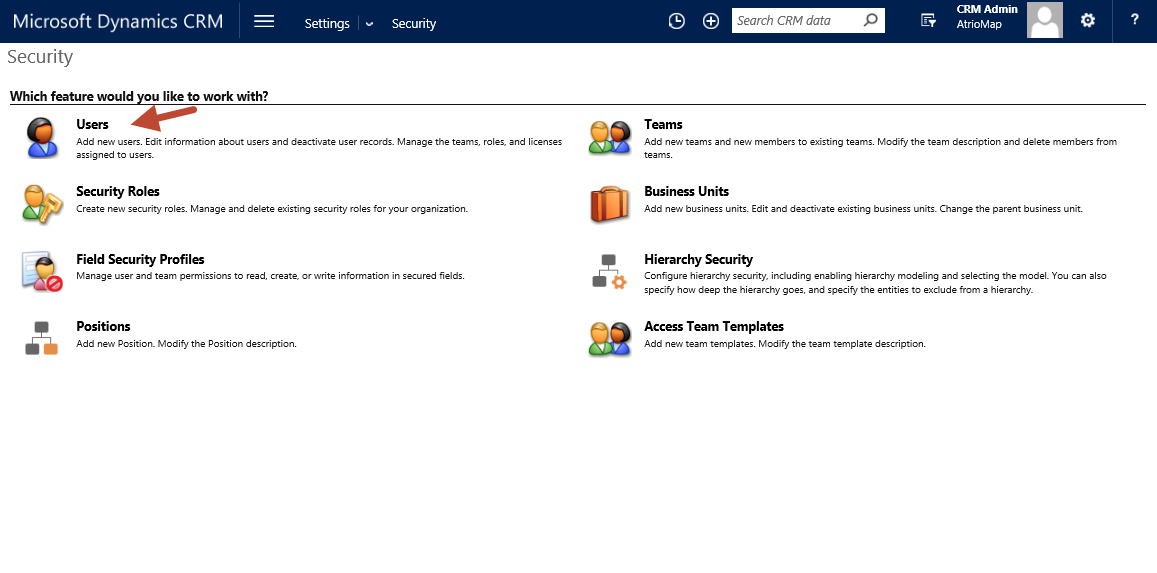


# **Assign User Roles**

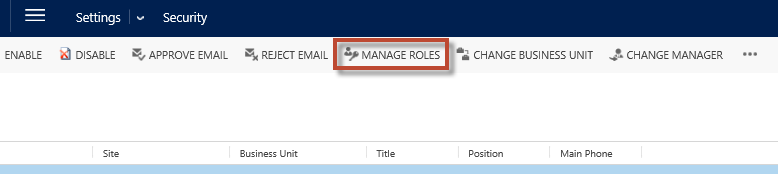
Anyone who needs to see NuSoft Auto Complete needs the **NUSOFT Auto Complete** User role.

1. Navigate to **Settings->Security->Users**.

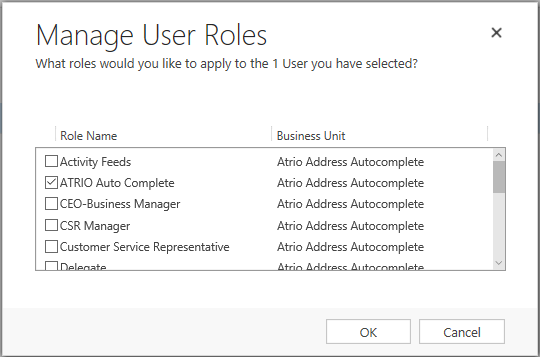




1. Select the users whom you wish to use NUSOFT Auto Complete.
2. Select **Manage Roles** in the ribbon.

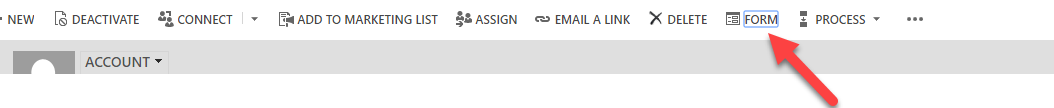


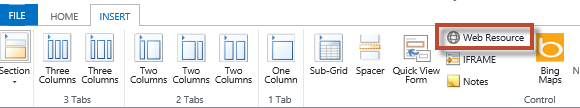
1. Choose the **NUSOFT Auto Complete** role and select **OK**.

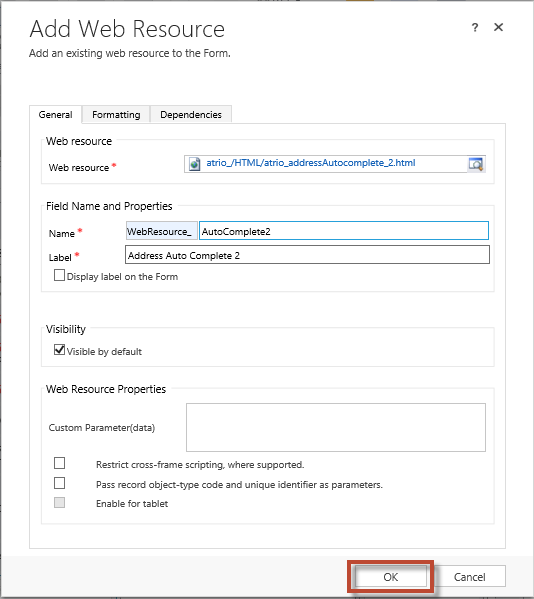


# **Adding a Second Address Auto Complete**

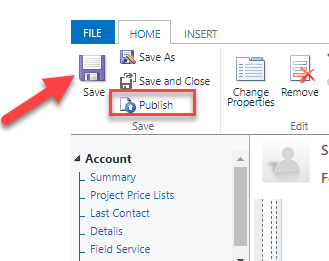
1. Navigate to **Sales >** **Account, Contact, or Lead > Go to any record**.
2. Go to any Account, Contact, or Lead form and select the **Form** button in the ribbon.

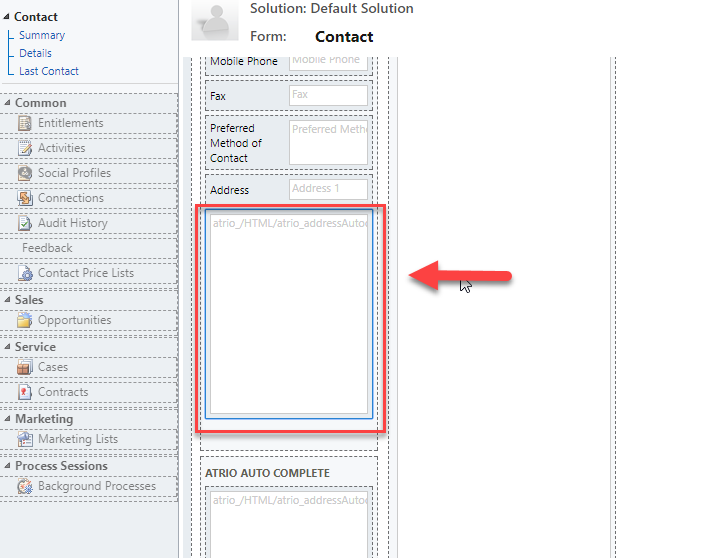


1. Under the **Insert** tab, add a **Web Resource**.
2. Copy the information in the boxes below, and click **OK**.



1. After saving and publishing the form, the second Address Auto Complete box will appear in the form.





# **Support**

Please send any product issues and suggestions to [support@nusoftsolutions.com](mailto:support@atriosystems.com).

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