Installing Data8 PredictiveAddress for Microsoft Dynamics 365/CRM

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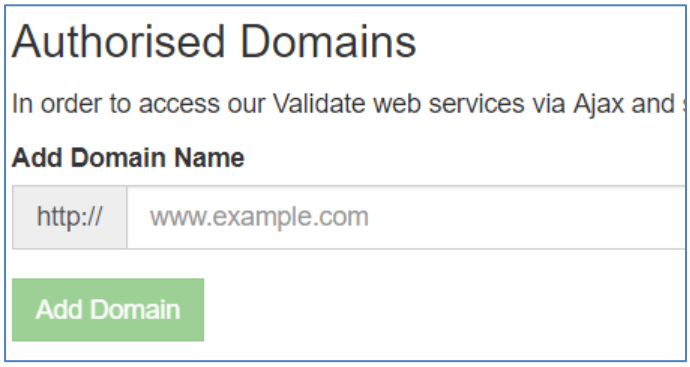
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Obtaining an Ajax API Key

Go to https://www.data-8.co.uk/ValidationAdmin/AjaxApiKey. Under “Add Domain Name”, enter the domain name you use to access the Microsoft Dynamics CRM server. For example, if you go to http://contoso.crm.dynamics.com/ to access your CRM system, enter “contoso.crm.dynamics.com”. Click on “Add Domain” to enable the use of the PredictiveAddress service from this domain name.



If more than one domain name can be used to access your CRM system, e.g. internal users use http://crmserver/ while home workers use http://crmserver.example.com/, add all applicable domain names in turn.

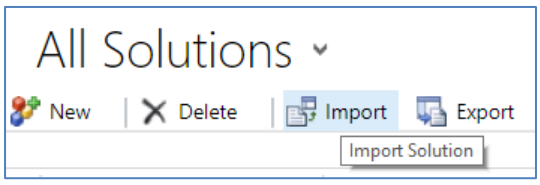
Note: If you installed the solution from AppSource this step is already completed, and *.dynamics.com will be added as an authorised domain. You can secure your account further however by removing this entry and adding in the specific domain name for your CRM instance.

At the top of this page, enter your Data8 password and click confirm to retrieve your Ajax API Key – make a note of this as you will need it later.

Installing the solution

You will have been provided with a zip file containing the postcode lookup solution. To install it, open Microsoft Dynamics 365/CRM and go to Settings > Solutions. Click “Import” to start the installation.

Note: If you installed the solution from AppSource then this step will have been completed for you.



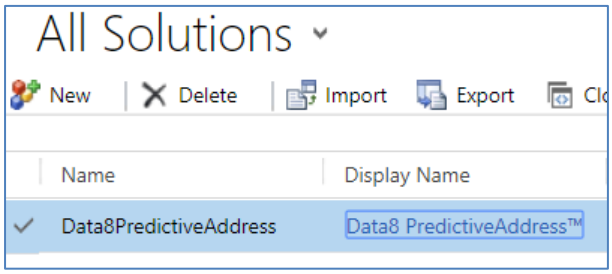
Click “Browse” and select the zip file you have been sent, and then click “Next”.

Click “Next” again and the solution will be imported.

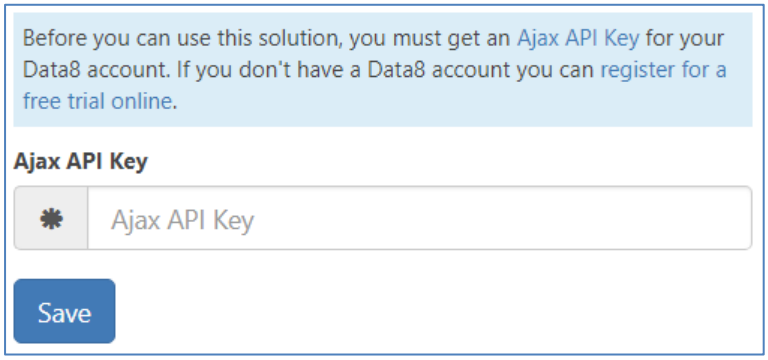
Click “Close” and the solution has now been imported.

Initial Configuration of the solution

From the list of solutions, open the Data8PredictiveAddress entry to bring up the configuration screen.



After the “Loading” message has finished, you will be shown a screen to enter your Ajax API Key you retrieved earlier.



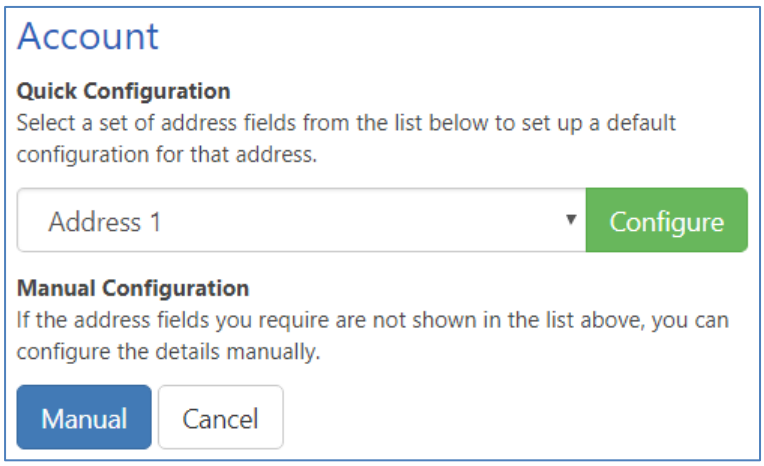
Enter your Ajax API key you took from the Data8 website earlier and click “Save”

Configuring PredictiveAddress



To add the PredictiveAddress functionality to a form, select the type of entity (e.g. Account) that you want to add it to, then click Add.

Note: If you installed the solution from AppSource, these configuration entries will already be added for all standard address fields. You may still need to complete the steps outlined in the "Form scripts customization" section below

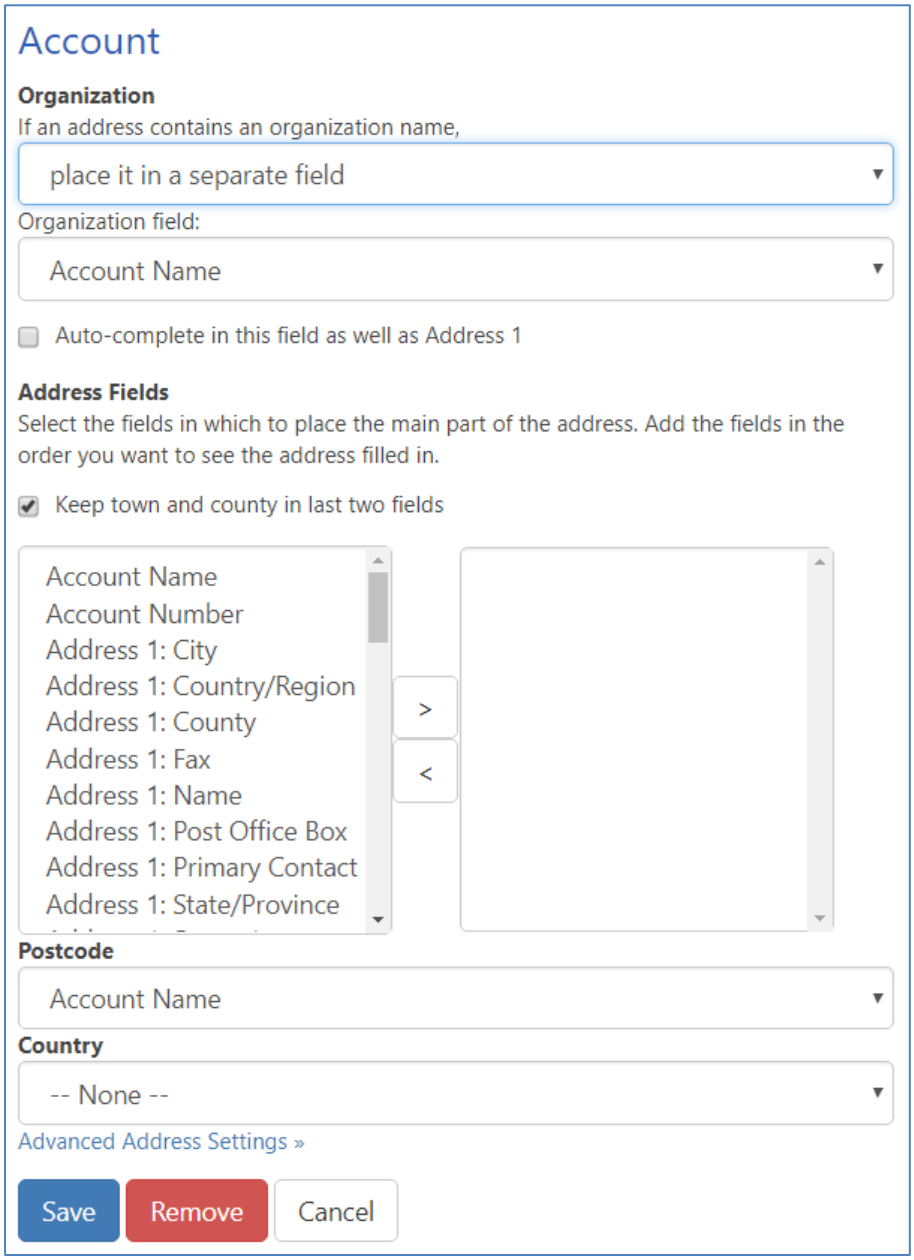


If you are adding postcode lookup to an entity that has standard CRM address fields (Street 1, Street 2, Street 3, City, State/Province and Zip/Postal code), the configuration wizard can do a lot of the configuration for you. You will be shown the screen above, with the Quick Configuration drop down list containing the names of the address blocks in the entity. Select the one you want to add postcode lookup functionality to and click Configure.

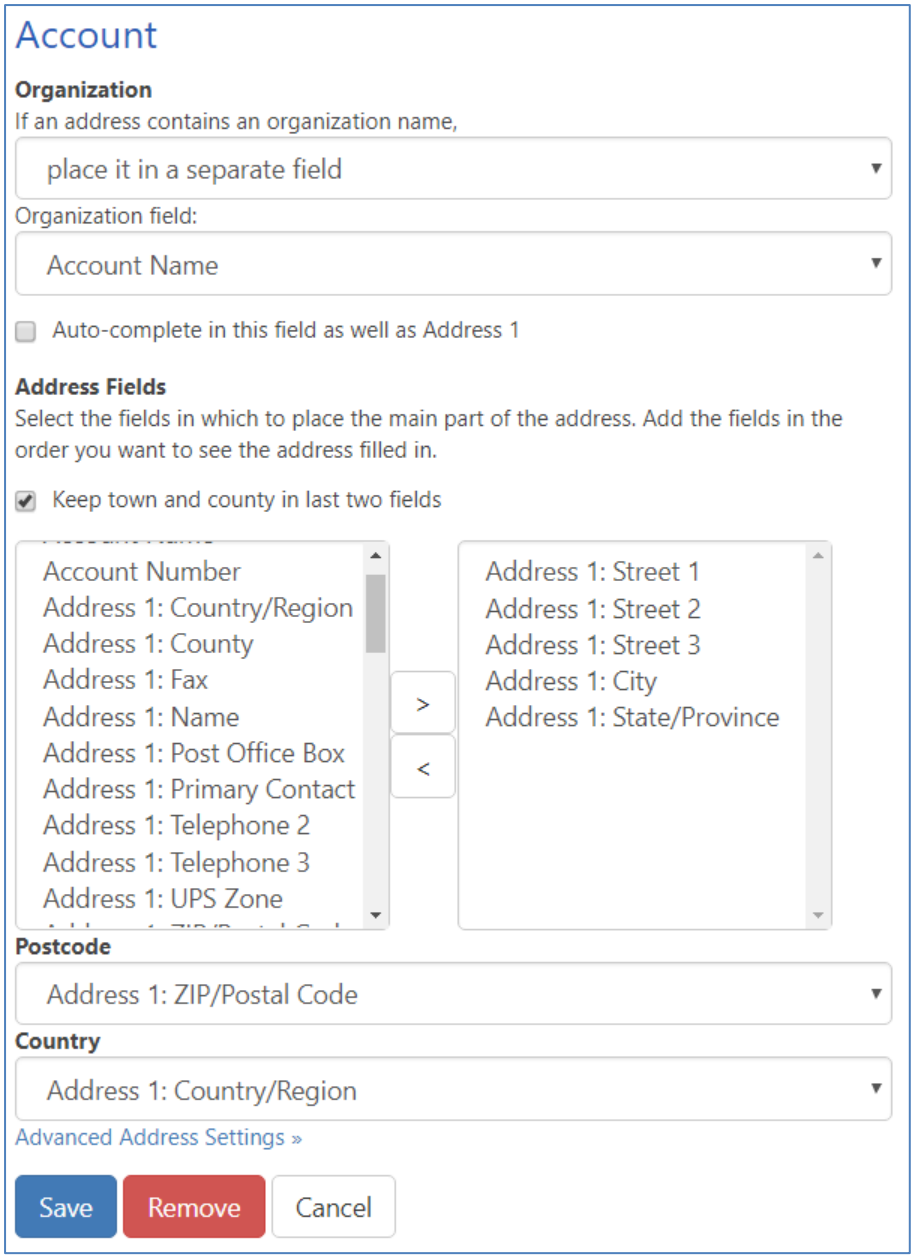
Using quick configuration, if there is an associated Name field, e.g. Address 1: Name, this will be used to hold any company name included in an address. Otherwise, any company name will be ignored. If this is not the desired behaviour, you can still continue to use the quick configuration wizard, but you will then need to click on the Configure link next to the entity type on the main configuration screen to edit the configuration manually.

Advanced Manual configuration of PredictiveAddress

If you want to add postcode lookup functionality to some other fields, click the Manual button and you will be able to select what fields to use to store the address details in. If no standard blocks of address fields can be found by the wizard, this step will be skipped and you will be taken straight to the manual configuration screen.



You can now set up what fields the address details should be placed in. For example, on an account screen you may want the company name to go into the Account Name field, while the address goes into address 1-3, city and state fields, with the postcode in the zip code field.



Note that the fields for the address have been added in order, and the “Keep town and county in last two fields” box has been checked.

When you are happy with the layout of your address fields, click “Save”.

You may alternatively choose to treat the organisation name as a normal part of the address, in which case any organisation name will be placed in the first address line and the other address details will be moved as appropriate, or you can choose to ignore it, in which case any organisation details will be lost.

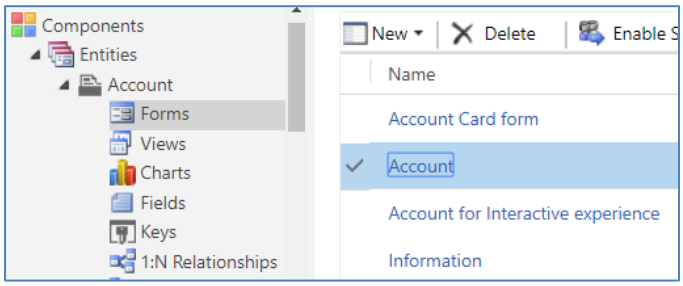
Repeat this process for any other forms you want to add PredictiveAddress functionality to.

Legacy Forms

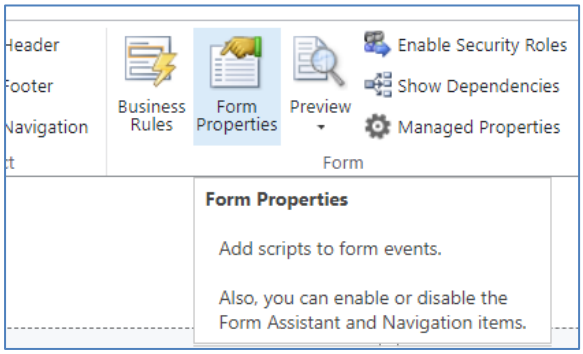
Form script customization

As well as adding configuration entries for the address fields you want to populate with PredictiveAddress, you also need to add an event handler to your form to start the PredictiveAddress functionality.

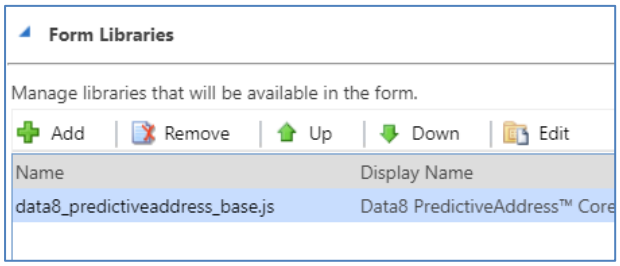
Under Settings > Customization > Customize the System, navigate to the entity you've added a PredictiveAddress configuration for and select the main form.



Open the form and click Form Properties in the ribbon.



Add the data8_predictiveaddress_base.js library to the Form Libraries section.

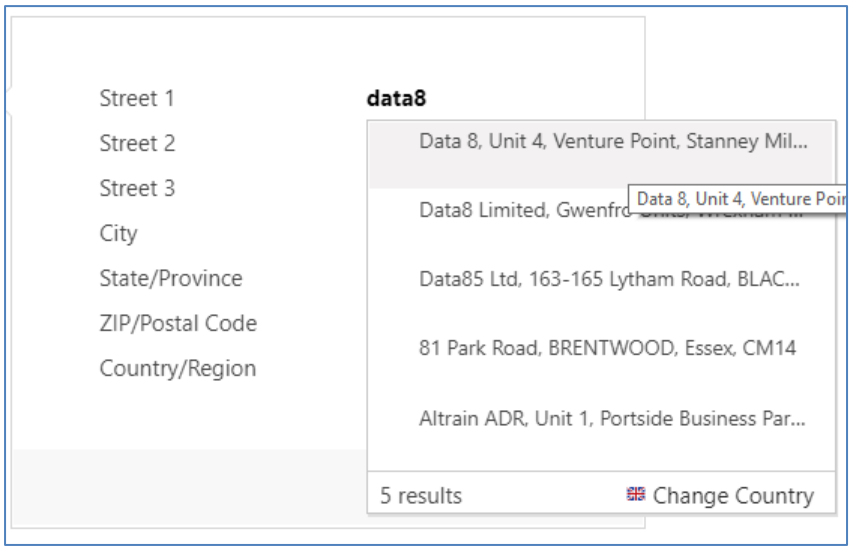


In the Event Handlers section, ensure the Control is set to Form, the Event to OnLoad, and click Add. Select the data8_predictiveaddress_base.js library from the list and enter the Function name as data8_predictiveaddress_start. Click OK to save the event handler, then OK again to close the Form Properties dialog. Save the form and publish the changes.

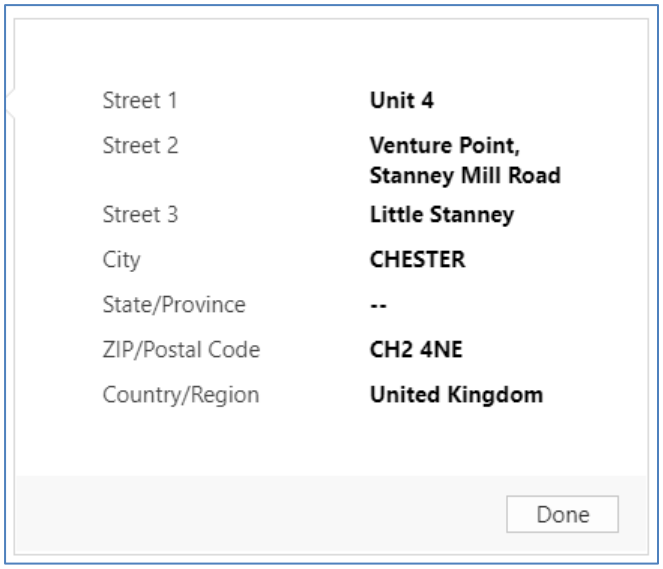
If you have multiple forms for the entity, repeat this process to add the event handler for any other forms you require.

Using PredictiveAddress

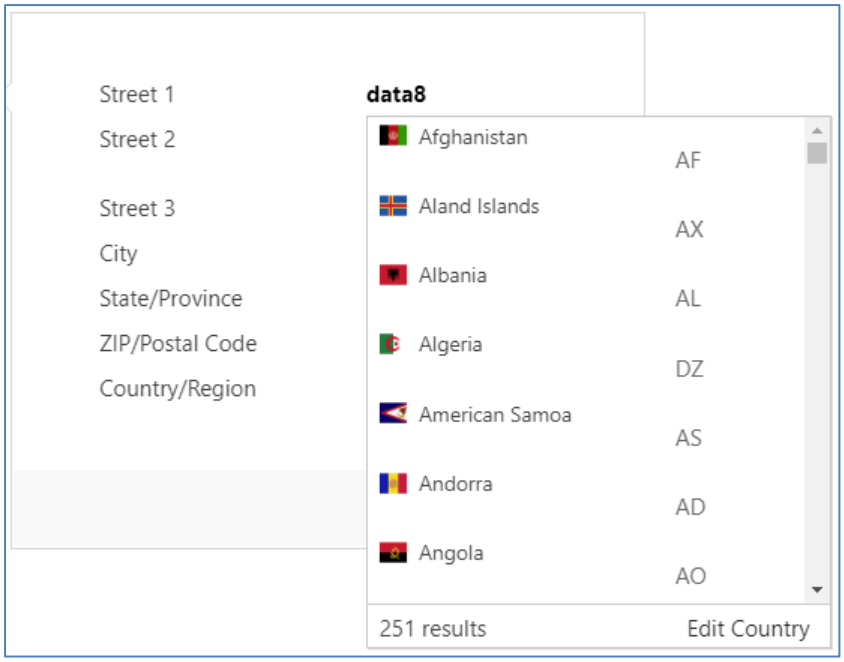
In a form that you have configured PredictiveAddress for, simply start typing the address in the Address 1 field. An autocomplete dropdown will appear beneath the field showing possible addresses. When you see the address you require, select it from the list.



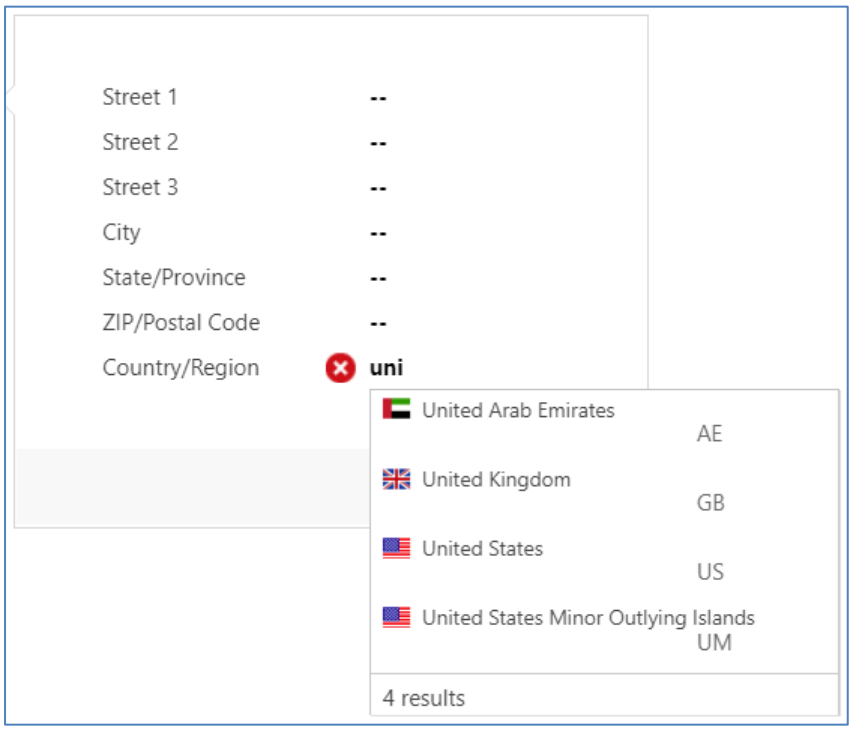
After selecting address, the other fields will be populated according to the configuration for the entity.



The suggestions will come from the country that the user is currently in by default. The country being searched is shown at the bottom right of the autocomplete dropdown. To change the country, click this link and select the required country from the list.



You can also start typing into the Country field to change the country there. That country will then be used when you start typing an address into the Street 1 field.



Unified Interface

Due to the removal of the AutoComplete functionality within the Unified Interface, moving forward the PredictiveAddress tool will be built using the PowerApps Component Framework.

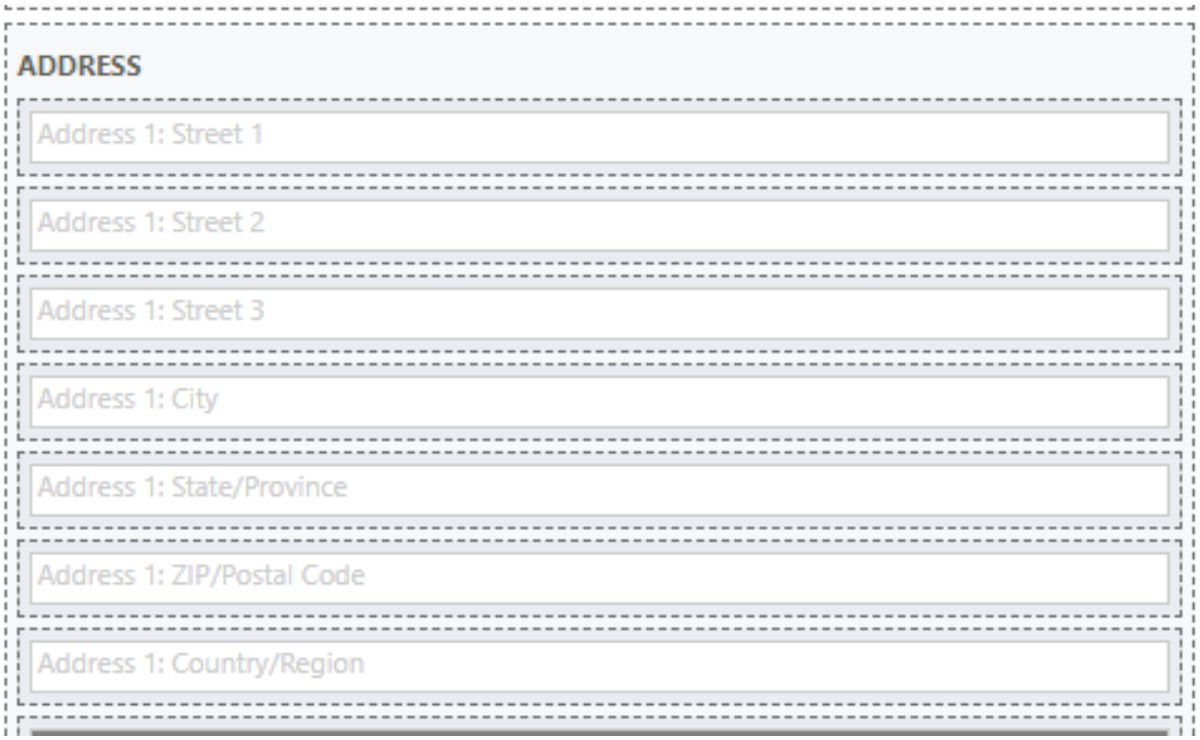
Form customization

Before we begin, you will need to make a custom field that is around 500 characters in length. Make this custom field in the entity you are going to configure for PredictiveAddress and make a note of the name.

Open the form editor you wish to add PredictiveAddress onto. At the time of writing, you cannot add a custom control through the “new” editor, so make sure you select “Switch to Classic” to pop out the legacy editor.

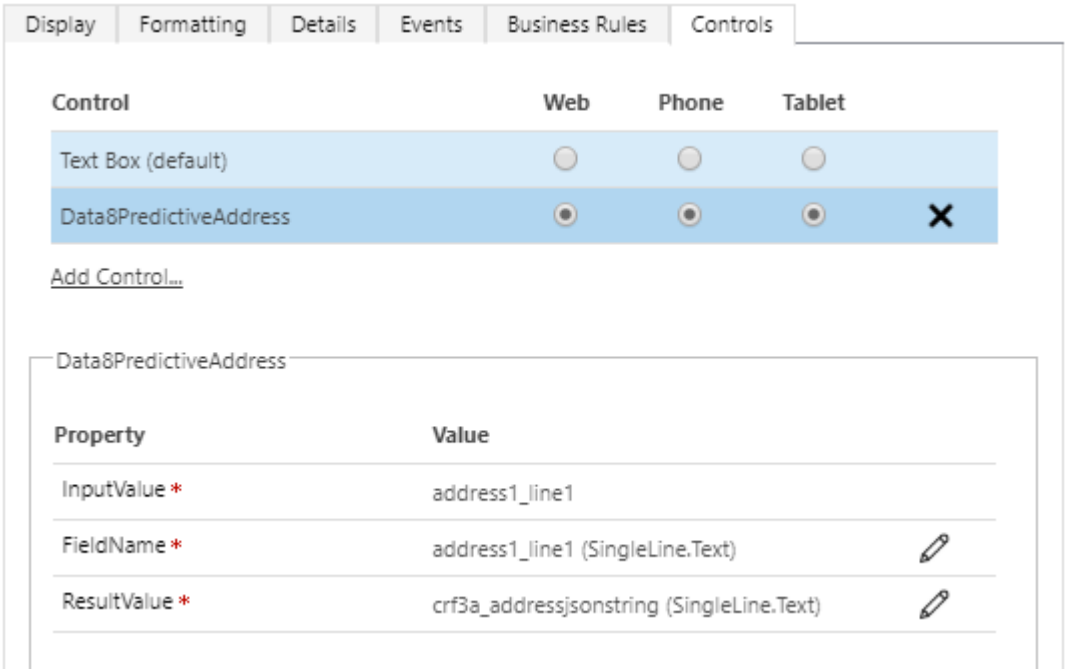


The PredictiveAddress custom control does not work with composite fields. This is a restriction placed by Microsoft so you will need to replace the composite fields with the unique fields instead, like so:



From there, select the “Street 1” field and select “Change Properties”. On the “Field Properties” window, select “Controls” and add the “Data8PredictiveAddress” control.

When you select the control, there are a number of settings you will need to set up, details on the next page.

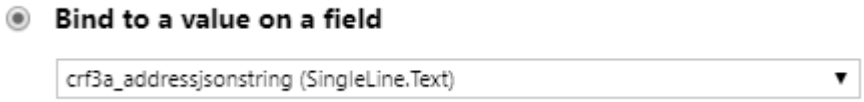


"InputValue" will already be populated with the currently field you are editing.

"FieldName" is the name of the field you are on (i.e. address1_line1). This should always be a XXX_line1 field. In order to set this field, you should "Bind to a static value" like so:



"ResultValue" is the name of the temporary field we will store some results. This is the field you made at the very start of this section.



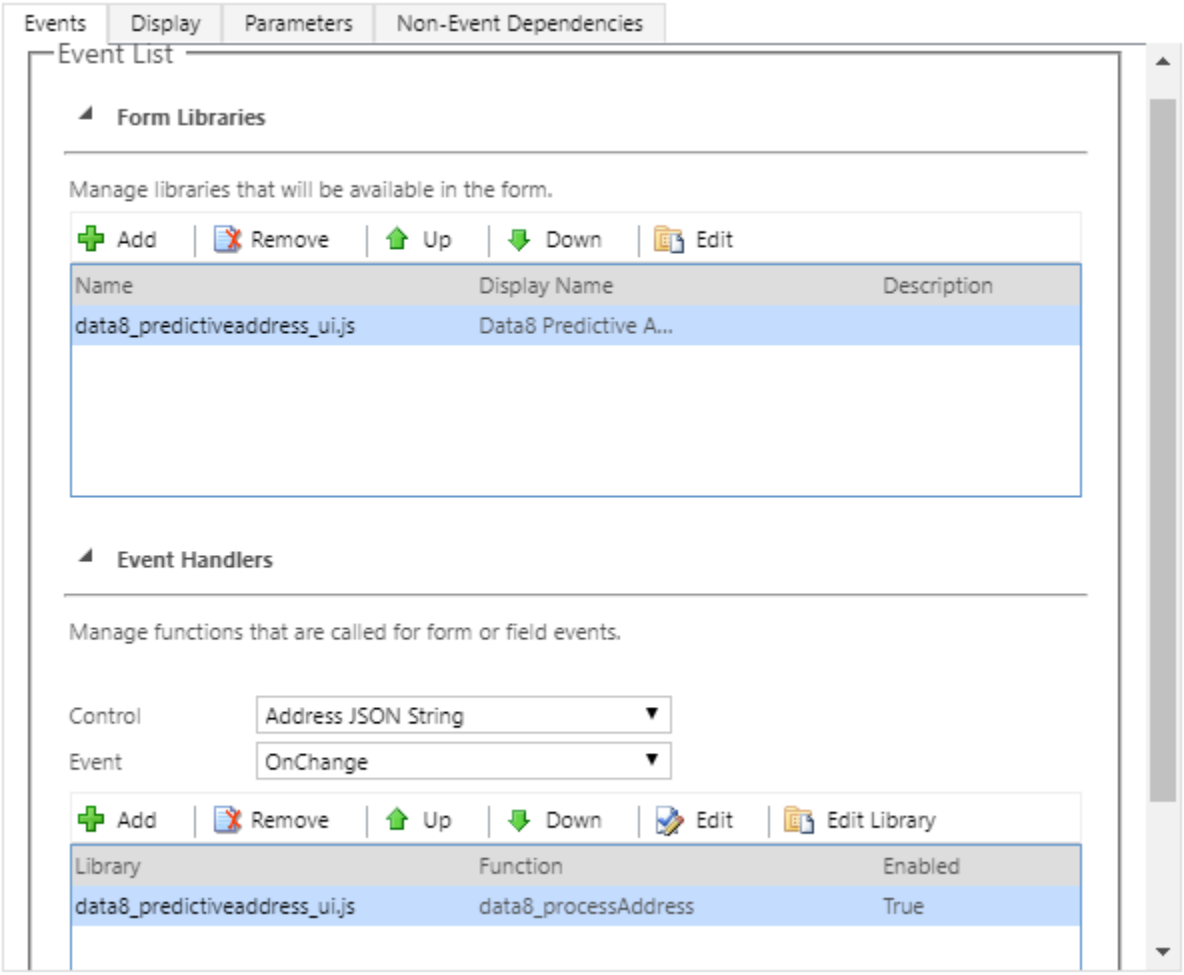
Once you have set those values, you can save and publish your form. The PredictiveAddress popup will now start working – however it will not correctly populate the results quite yet. In order to do that, please follow the next section.

Making Results Persist

In order to populate order fields when you have a selection using Data8 PredictiveAddress, you need to make a few more form tweaks.

Again in the “classic” form editor at the time of writing, please complete the following steps:

1. Add the custom field you are using for “FieldName” somewhere onto your form – it can be hidden, it just needs to be on there.
2. Add “data8_predictiveaddress_ui.js” to the form
3. Add an Event Handler to the custom field you are using step 1 – the event handler is called “data8_processAddress”.
4. Save, publish and close.



After all these steps are completed, your address should start auto populating within the Unifed Interface.

Global Configuration

Controlling access to the PredictiveAddress™ system

For a user to have access to the PredictiveAddress system, they must have read access to the “Data8 PredictiveAddress™ Configuration” entity. This can be achieved by either adding individual users to the “Data8 PredictiveAddress™ User” security role, or modifying an existing security role to include read access to this entity.