

q.address Add-On for Dynamics 365 Customer Engagement (CRM)

Installation and User Manual (AppSource Version)

– Version 1.1, 8. November 2019 –

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1 Preface

This manual describes how to install and use the AppSource version of the q.address Add-on. Other installation variants for Dynamics 365 Customer Engagement Online and On-premises with self-hosted q.address Quality Server are also mentioned, although not treated in detail.

1.1 q.address

q.address is an established solution wherever the data quality of addresses is concerned – from a stand-alone version that cleanses addresses in conventional files and databases to the powerful integrations in the Microsoft Dynamics 365 business applications.

Since the very first versions Microsoft Business Solutions CRM 1.2 (2004) and Microsoft Dynamics CRM 3.0 (2005) – these were the names of the CRM at that time ¹ –, ACS Informatik has offered its q.address Add-on. Today the q.address Add-on supports Dynamics 365 Customer Engagement (CRM) in the Online and the On-premises versions. Since end of 2019 the q.address Add-on is also available on the AppSource Marketplace!

1.2 q.address Add-On for Dynamics 365 Customer Engagement (CRM)

The **q.address Add-on for Dynamics 365 Customer Engagement (CRM)**² provides data quality and address verification services such as address validation (AC module), duplicate search and cleansing (DC module) and address search (AS module).

Dynamics 365 Customer Engagement

By the way: "Dynamics 365 Customer Engagement", or in short "Dynamics 365 CE" is the new name for "Dynamics 365 CRM" with the modules Sales, Marketing, Field Service etc. Correspondingly, our add-on became "q.address Add-On for Dynamics 365 Customer Engagement" or "q.address Add-On for Dynamics 365 CE".

¹ See <https://www.qaddress.com/de/blog/history-von-dynamics365/> (German).

² Or in short: q.address Add-On for Dynamics 365 CE.

1.2.1 Main Modules

The main modules and components of the q.address Add-on for Dynamics 365 Customer Engagement (CRM) are:

q.address Plug-in

This module remains largely hidden from the user. It works in the background and keeps the q.address Index up-to-date.

q.address Search (AS)

Addresses are often difficult to find. You can spend a lot of time because you either don't know the correct name or only know it incompletely, names and addresses are spelled differently than expected, parts of names are rearranged or acronyms and abbreviations are used. q.address searches error tolerant and not only takes phonetic variations into account, but also all common typos, abbreviations, name rearrangements, acronyms and many more.

q.address AddressCheck (AC)

If you enter a new address or if you update an address, the module will check whether the address and the spelling is correct, and whether the postal code, city and street match. Simple errors will be corrected automatically in the background. For more serious errors, where q.address does not want to make an automatic decision, a dialog pops up so that the user can decide himself. q.address uses postal reference directories for the DACH region as well as other European countries and countries worldwide.

Normally the check is done in the background without you noticing anything – except for a hint to an automatic correction or failure, if so.

q.address DuplicateCheck (DC)

If you enter a new object such as Account, Contact or Lead or if you update in a relevant data such as the name, address, communication data in an existent object, the module will check whether the object or a similar variant already exists in your CRM.

If that's the case, a dialog pops up and you can decide if it's really a duplicate, and q.address will then assist you to merge the objects.

Normally the check is done in the background without you noticing anything.

Note

The "classically" installed q.address Add-on offers further checks and formatting, in particular the q.address NameCheck for name checking and salutations, as well as further checks and formatting of dates, telephone numbers, e-mail addresses. All functions will soon also be available in the AppSource version.

1.2.2 Design and Installation Variants of the q.address Add-on

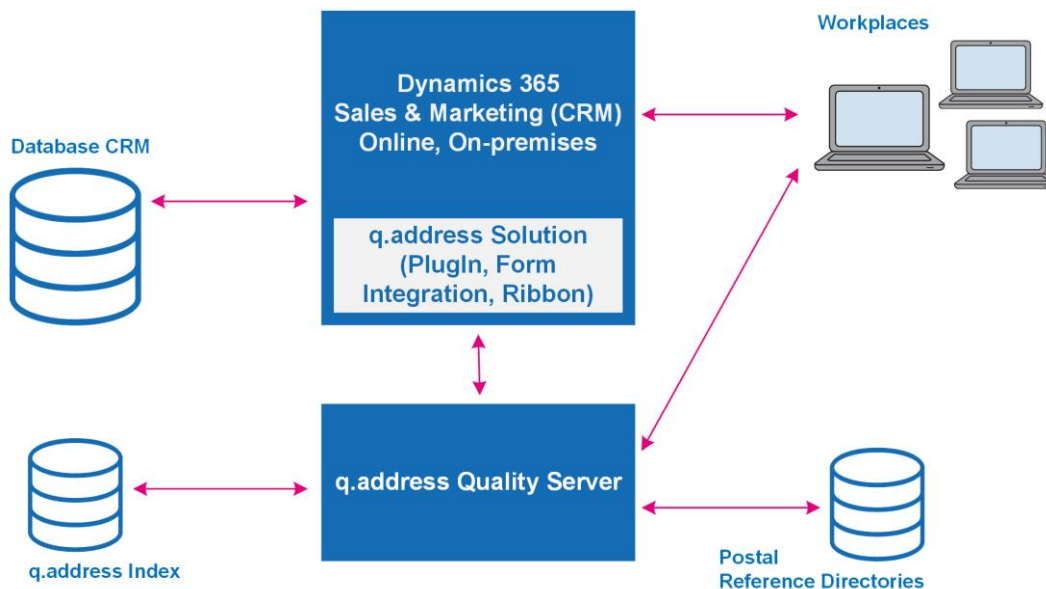


Fig. 1-1 – The image shows a simplified illustration of the components: Dynamics 365 Customer Engagement with the q.address Solution, the q.address Quality Server and the user workplaces.

Standard AppSource Installation

The AppSource installation requires the online version of Dynamics 365 Customer Engagement.

It imports the q.address Solution as a managed solution and uses the q.address Cloud Services, which are internally based on the q.address Quality Server.

It is the fastest and most comfortable way to install the q.address Add-on.

Further Installation Variants

You can alternatively use your own q.address Quality Server and install it on your own systems, keeping your data on your own systems only. It also allows you to subscribe to postal directories and install and use them locally. It is even possible to subscribe to the directories for individual, frequently used countries (e.g. Germany, Austria, Switzerland) and to receive it as a service (aaS) for other countries worldwide.

It is the recommended installation method for the on-premises version of Dynamics 365 Customer Engagement.

Components

The q.address Add-on includes the following components:

- ❖ q.address Solution, which is installed with the following components:
 - q.address Plug-in
 - q.address Search (AS)
 - q.address AddressCheck (AC)
 - q.address NameCheck (NC) ³
 - q.address DuplicateCheck (DC)
- ❖ q.address Quality Server serving the core functionality

1.3 q.address Stand-alone 365

In addition, there is also the stand-alone version q.address Stand-alone 365. **q.address Stand-alone 365** allows you to check and cleanse the entire address database in your CRM. Thus q.address Stand-alone 365 is suitable for the basic cleanup of the CRM database or for preparing a migration to CRM or an upgrade to a new CRM version. q.address Stand-alone 365 allows you to directly access the CRM database and to correct addresses and merge duplicates within the database. This includes merging of the dependent data – such as Contacts, Sales Opportunities, Invoices, Custom Entities etc. (“in-place cleansing”).

In addition, q.address Stand-alone 365 is recommended for the pre-checking of data imports: Check the addresses with q.address Stand-alone 365 and avoid loading new duplicates into your CRM!

q.address Stand-alone 365 is installed and executed locally on your computer (on-premises) and checks and cleanses your CRM database, whether online or on-premises.

³ In the current AppSource version the q.address NameCheck is not yet available.

1.4 Data Protection

Addresses typically also contain personal data for which the data protection regulations (GDPR) must be complied with. The requirements vary depending on the application fields:

- Postal address verification
- Verification and formatting of names and communication data (telephone numbers, e-mail addresses) ⁴
- Address search and duplicate checking

Address Checking

The postal address check analyzes the address elements country, postal code, city and street or P.O. box (but no names). This data may include personal data. The examination and formatting of names and communication data, however, practically always includes personal data.

The q.address Add-on transmits the data for the checks to the q.address Quality Server. In the q.address Quality Server the data is checked and matched against postal reference directories and name thesauri (q.address Lexicon). In the case of e-mail addresses, the existence of the domain and an MX record may also be checked by a request to the configured DNS server. The result is then returned to the q.address Add-on and displayed to the user and stored in the CRM address database according to his instructions.

The data is not stored on the q.address Quality Server, but is only kept in volatile memory for the duration of the operation. Only for billing purposes the date, time and postal code (if available) of each request to the q.address Cloud Services are collected in a log file.

Address Search and Duplicate Checking

For address search and duplicate check, the q.address Quality Server maintains an index – the q.address Index – which contains the names and postal addresses, as well as further configurable contact elements such as telephone or e-mail address for all searchable entities. Almost always personal data is involved.

The q.address Add-on transfers the data for an address search or duplicate check to the q.address Quality Server. In the q.address Quality Server the data is

⁴ Not yet available in the current AppSource version.

searched in the q.address Index and then the result is returned to the q.address Add-on and displayed to the user.

Any change in the CRM – names or addresses that have been added, updated, disabled or deleted – is recognized by the q.address Plug-in and transferred to the q.address Quality Server to update the q.address Index.

To increase security, the q.address Index is encrypted. (With the on-premises installation the encryption can be disabled.)

GDPR Compliance

The standard AppSource installation assigns the q.address Quality Server hosted in the q.address Cloud (q.address Cloud Services). You don't need your own server, and ACS will operate the server as a processor for you. Thus, a data processing agreement between you and ACS is required.

You can alternatively license the q.address Quality Server and run it self-hosted yourself. In this case all data remains under your control. (C.f. section 1.2.2)

Please contact ACS for details: sales@qaddress.com

1.5 Support

In case of any problems don't hesitate to contact our support:

ACS Informatik GmbH
Landsberger Str. 398
81241 Munich
Germany
support@qaddress.com

We wish you much success in your working with q.address.

2 Installation and Configuration

The q.address Add-on can be installed in different ways (see section 1.2.2):

- ✦ AppSource installation for Dynamics 365 Customer Engagement Online
- ✦ Custom installation for Dynamics 365 Customer Engagement Online or On-premises with
 - q.address Quality Server on premises
 - q.address Cloud Services

In this installation guide the AppSource installation is described. The other installation variants will be mentioned in passing.

2.1 Installation

Only a few steps are required for the AppSource installation:

- ✦ The installation of the AppSource version of the q.address Add-on is a one-click installation. Please follow the Microsoft instructions for the installation of AppSource applications.
- ✦ After the installation you might wish to make some adjustments to your settings. You can do this (section 2-2), but in general it is not necessary.
- ✦ If you want to use Smart & Advanced Search and Duplicate Check, you must now generate the q.address Index (section 2.3).
- ✦ That's all, you are now ready to go! The installation generally takes about five minutes plus the time needed for the q.address Index generation (e.g. 10 to 30 minutes for 100.000 objects to be indexed).

The q.address Add-on supports English and German and by default the same language as Dynamics 365 will be used. If Dynamics 365 is configured for another language, English is used by default.

If you prefer to do the installation with remote support of a technician, please contact our support: support@qaddress.com.

If you need a customized configuration, please contact our sales: sales@qaddress.com.

2.2 Solution Configuration Dialog

Use the configuration dialog to customize the q.address Add-On settings:

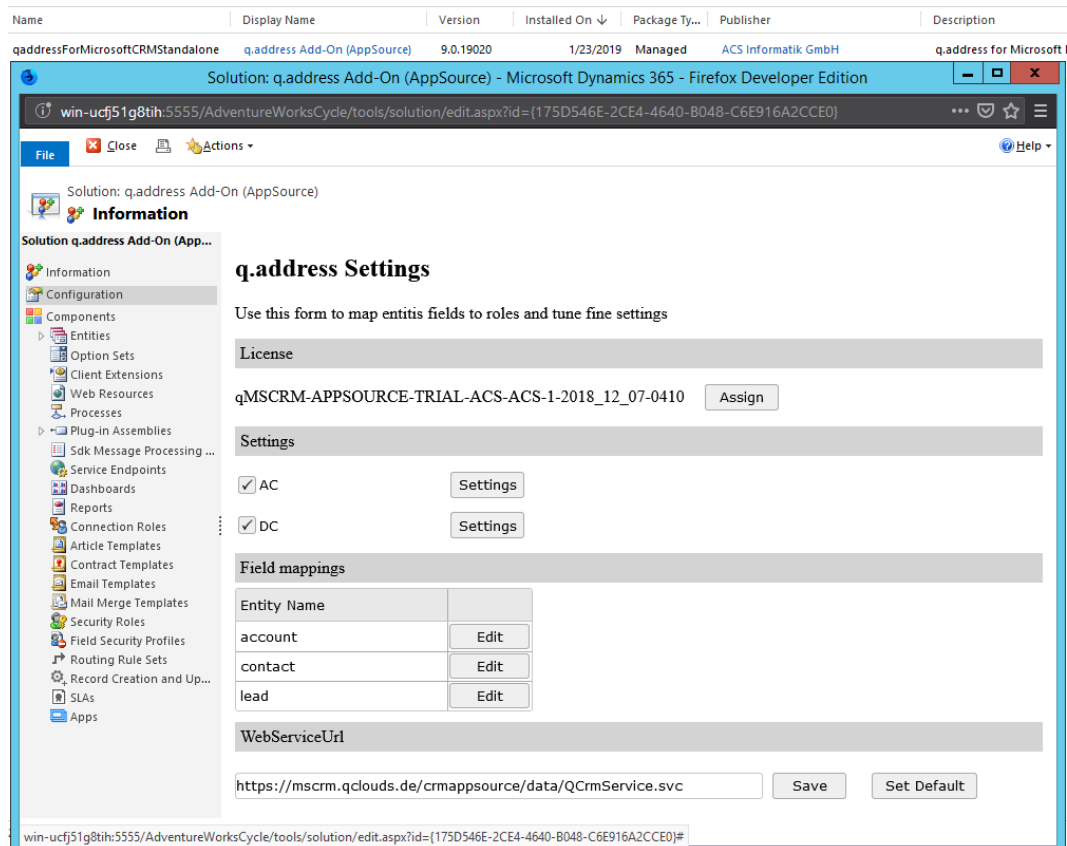


Fig. 2-1 – Solution configuration dialog.

- 🔗 License (Lizenz)⁵

Name of the active license. To assign a new license file click the “Assign” button.
- 🔗 Settings (Einstellungen)

Activate or deactivate the modules AC (Address-Check) and DC (DuplicateCheck: duplicate search and cleansing, address search).
Click “Settings” to configure the module settings.
- 🔗 Field mappings (Feldzuordnungen)

Defines the field mappings for the CRM entities. The field mapping is required to map the CRM fields (address1_line1, address1_postalcode, etc.)

⁵ In brackets: German labels and buttons.

to the corresponding q.address roles (Addr1Street1, Addr1ZIP, etc.).

Click “Edit” to edit the mappings.

 Web service URI

URI of the q.address Web-Service. You must update the URI if you are going to use your own server.

To open the configuration dialog (Figure 2-1), proceed as follows:

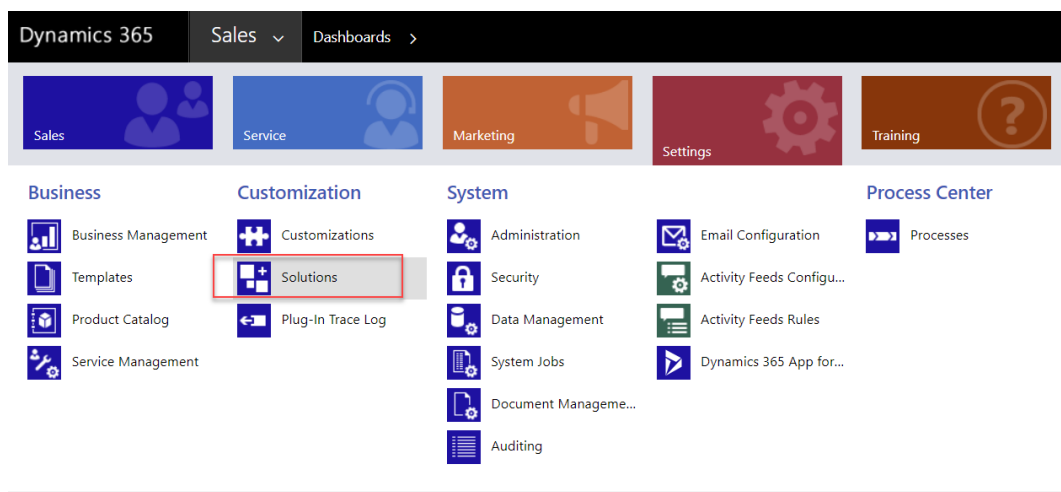


Fig. 2-2 – Settings > Solutions > q.address Add-on in Figure 2-3.

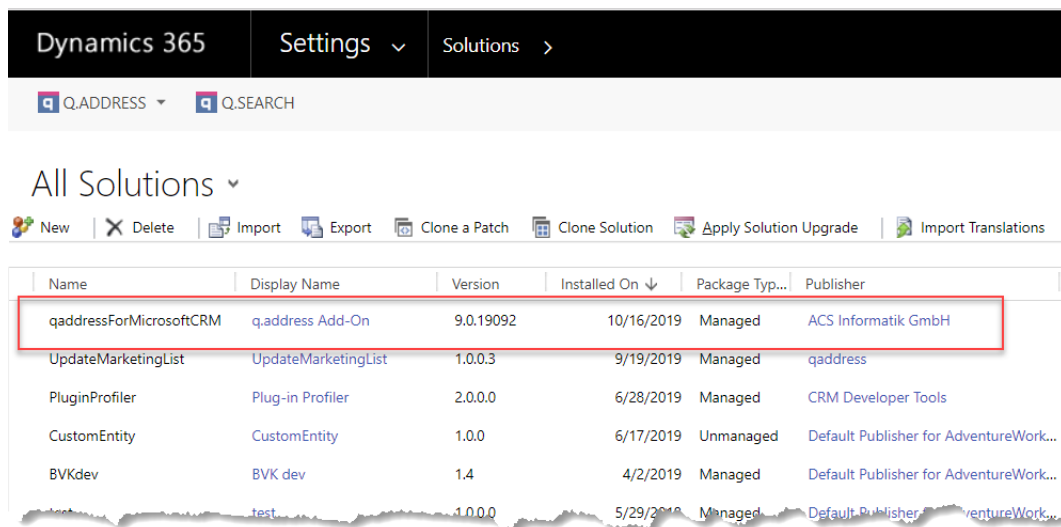


Fig. 2-3 – Double click “q.address Add-on” to open the configuration dialog (Figure 2-1).

2.3 Generation of the q.address Index

q.address needs an index to search duplicates (duplicate search) and addresses (address search), the “q.address Index”.

To create the index call the menu function “Batch indexing” (Figure 2-4):

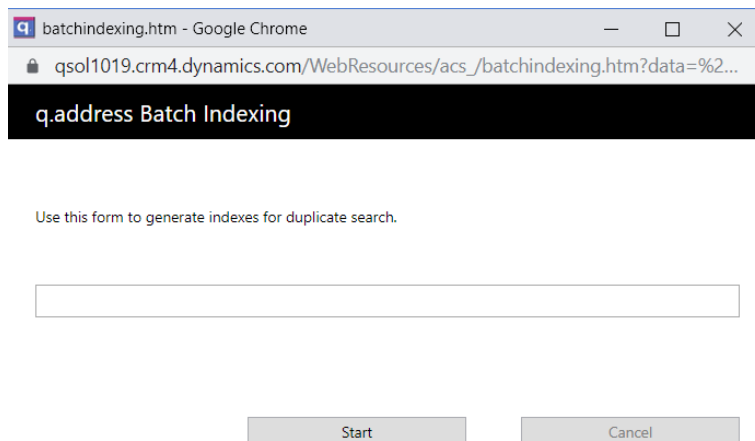


Fig. 2-4 – Batch indexing dialog.

Use this dialog to generate a new q.address Index which is required by the DC module for duplicate search and address search.

Usually, the index generation will be done after the q.address Add-on installation. Once it was generated it will be managed and reorganized automatically by q.address.

It will need a new generation if the index settings were changed.

The time required for the index generation depends on the installation (Cloud or on-premises, installation and configuration details) and the number of objects to be indexed. For 100.000 objects to be indexed, calculate a generation time of 10 bis 30 minutes, or 500.000 objects calculate a generation time of 1 to 3 hours.

Automatic Index Reorganization

Every day at 1:00 a.m. the q.address Quality Server checks whether a reorganization of the q.address Index is needed (cf. Section 1.2.2, Figure 1.1) and automatically carries it out if necessary. Time and reorganization criteria can be configured.

2.4 Test of the q.address Plug-in

The q.address Plug-in tracks all changes in CRM objects and keeps the q.address Index up-to-date: It will add new indices if new objects (Accounts , Contacts, Leads etc.) were created or updated, and it will remove indices which became obsolete.

You can easily verify the q.address Plug-in functionality:

- ❖ Search an address, e.g. by name and street
- ❖ Open the address and change the name or street
- ❖ And search the address again: if you have changed the address sufficiently, it should no longer be found with the initial search request. If you change your query, it will be found again. This proves that the q.address Index has been updated, the initial data were removed from the index, and the new data were added.

3 Menu and Buttons

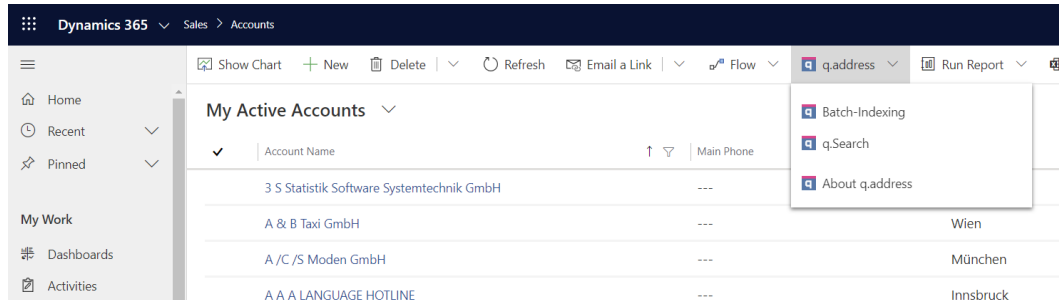


Fig. 3-1 – Main menu items.

The q.address Add-On adds a menu and an address search button to the Dynamics 365 application ribbon.

q.address Menu Items

- ⊕ Batch indexing (German: *Batch-Indizierung*), for further details see section 4.
 Opens the batch indexing dialog to start index generation.
- ⊕ q.Search (German: *q.Suche*), for further details see section 5.
 Opens error tolerant address search dialogs (Advanced Search, Smart Search)
- ⊕ About q.address (German: *Über q.address*), see section 9.
 Opens the about dialog.

The menu items “Batch indexing” and “q.Search” will only be available, if the DC module is activated (c.f. section 2.2).

q.address Buttons

- ⊕ q.Search (German: *q.Suche*), for further details see section 5.
 Opens error tolerant address search dialogs (Advanced Search, Smart Search)

The button “q.Search” will only be available, if the DC module is activated (c.f. section 2.2).

4 Address Search

The q.address Add-on provides two search variants:

🔍 Smart Search (Figure 4-1)

Smart search provides one single input field for your query. Enter any data in any sequence that might help you to find the address you search.

🔍 Advanced Search (Figure 4-2)

Advanced search provides a structured input form for your query with individual input fields for names, postal code, city and street name etc.

In both searches, you only need to enter as much data as you need to find your address, e.g. the name and the street or postal code, or telephone number, etc. (The searchable fields are configurable.)

Both searches are error tolerant. However, using Advanced Search with its structured input you might find more addresses. So, if you fail to find your address with Smart Search, switch to Advanced Search. Generally, we recommend to start with Smart Search by default.

Both search modes allow you to restrict the search results to individual entities, such as Accounts, Contacts or Leads.

Once you have found the address you are looking for, you can open it by double-clicking on it or using the “Open” button.

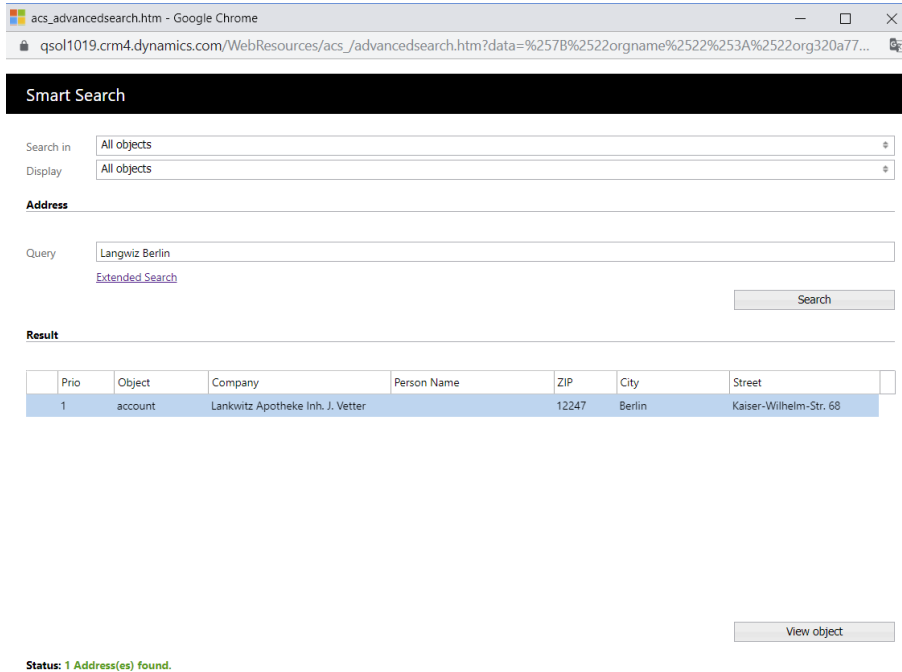


Fig. 4-1 – Smart Search dialog.

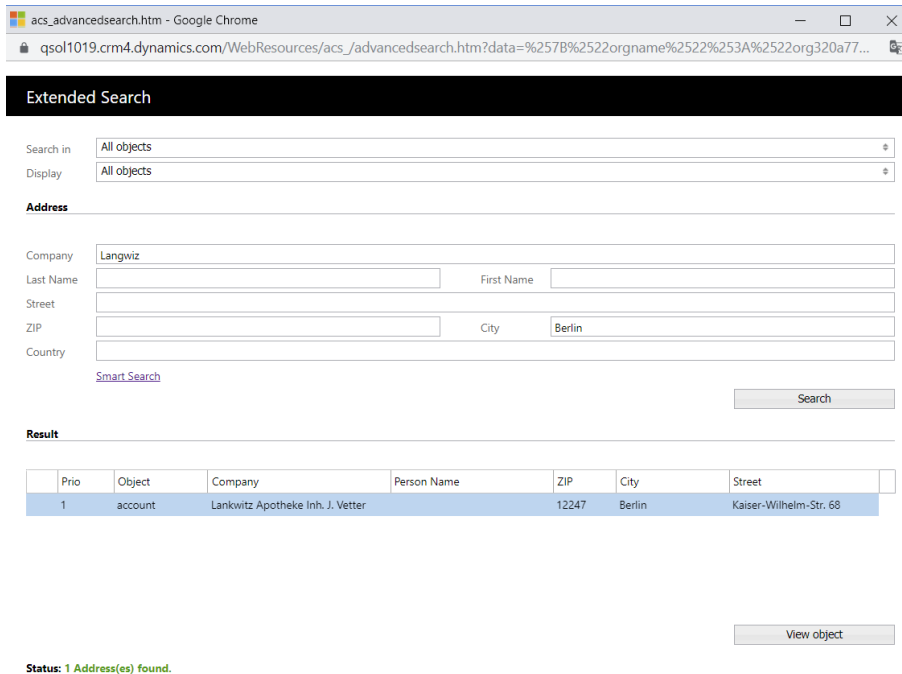


Fig. 4-2 – Advanced Search dialog.

5 Monitoring Address Quality

5.1 q.address AddressCheck

The module “q.address AddressCheck” ensures that newly created or edited addresses are valid. It checks the spelling and consistency of the addresses.

During the check, q.address verifies the address against postal reference directories. Postal reference directories can be used locally (on-premises) or in the Cloud. Local reference directories you will have to subscribe, and cloud services have to be booked.

In address maintenance, the check takes place in the background. Minor errors are corrected automatically. For more serious errors, which q.address cannot or should not decide automatically, a dialog pops up, in which the user can manually select and assign the valid address (Figure 5-1).

q.address Address Tools

! Address ! Duplicate Check

Tolerance: Standard

Address

Street 1: Mayer-Str. 31 | Postal code: | City: München

Street 2: | Region: | Country: |

Street 3: |

Buttons: Reset, Check address, Save address

Result

Status: Correct Corrected Multiple results Not found

Prio	Object	Country	Postal code	City	District	Street
1	Street	Deutschland	80997	München	Allach-Untermenzing	Mayrstr.
2	Street	Deutschland	81379	München	Thalk.Obersendl.-Forsten-Fürsten.-Solln	Rupert-Mayer-Str.
3	Street	Deutschland	80807	München	Schwabing-Freimann	Hannes-Mayer-Str.
4	Street	Deutschland	81825	München	Trudering-Riem	Bernhard-Mayer-Str.
5	Street	Deutschland	81379	München	Sendling	Matthias-Mayer-Str. 3 - 5
6	Street	Deutschland	81379	München	Thalk.Obersendl.-Forsten-Fürsten.-Solln	Matthias-Mayer-Str. 4 - 6
7	Street	Deutschland	80337	München	Ludwigsvorstadt-Isarvorstadt	Maistr.
8	Street	Deutschland	81925	München	Bogenhausen	Mahistr.
9	Street	Deutschland	81375	München	Hadem	Maenherstr.
10	Street	Deutschland	80939	München	Schwabing-Freimann	Mani-Goeppert-Mayer-Str.
11	Street	Deutschland	80689	München	Pasirg-Obermenzing	Wilhelm-Maur-Str.

Buttons: Save selected address

Status: Address cannot be verified automatically.

Fig. 5-1 – q.address AddressCheck dialog: There are two tabs, one for viewing and editing the postal address, the other with the result of the duplicate check.

The dialog is divided into two areas: The address to be checked is displayed in the upper area. The lower area displays a list of the candidate addresses that were found for this query. You can vary the search address to find other, better candidates. If the correct address is shown in the results list, you can assign it to your object.

- ⊞ Reset (Zurücksetzen)⁶ This button resets the search address to the initial address.
- ⊞ Close & Reset (Schließen und zurücksetzen) This button closes the dialog and leaves the initial address.
- ⊞ Save address (Speichern) This button assigns the address you entered in the upper area to your object. In this way, you can also assign individual addresses that are not contained in the reference directory.
- ⊞ Assign address (Anschrift zuweisen) This button assigns the address selected in the result list to your object.

After the address has been assigned, q.address starts a new duplicate search with this new address and displays the result in the second tab (section 7).

5.2 q.address DuplicateCheck

The “q.address DuplicateCheck” module ensures that newly created or edited addresses are unique. It searches for duplicate objects in the CRM and shows the user duplicate candidates it found (Figure 5-2).

The search for duplicates is carried out after the postal address was confirmed (section 5.1). This ensures that the duplicate search is done with the correct resp. corrected address. If the original address was already OK or could be corrected automatically, the duplicate check is started at once and the result is shown immediately.

⁶ In brackets: German labels and buttons.

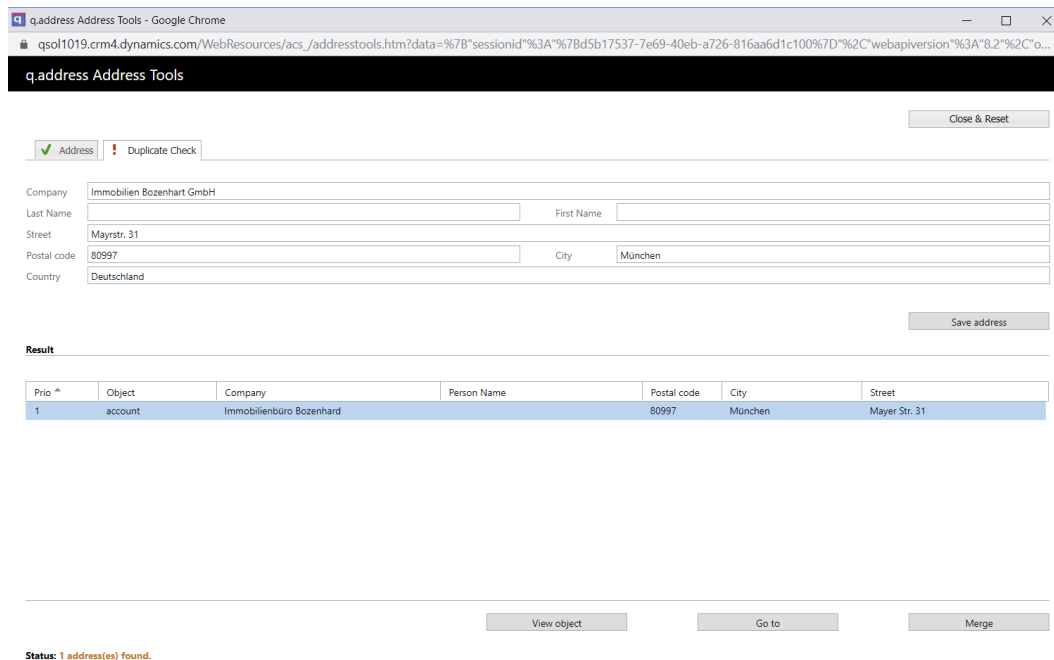


Fig. 5-2 – q.address DuplicateCheck dialog: There are two tabs, one for viewing and editing the postal address, the other contains the result of the duplicate check.

- 🔗 **Close & Reset (Schließen und zurücksetzen)**⁷
 This button closes the dialog window without creating a new object.
- 🔗 **Save address (Adresse speichern)**
 This button saves the object with all corrections you made.
- 🔗 **Merge (Verschmelzen)**
 This button opens Dynamics Merge dialog.
- 🔗 **Go to (Gehe zu)**
 This button opens the selected object and discards your entries for the new or changed object. No object is created or changed.
- 🔗 **View object (Öffnen)**
 This button opens the selected object in a new window.

⁷ In brackets: German labels and buttons.

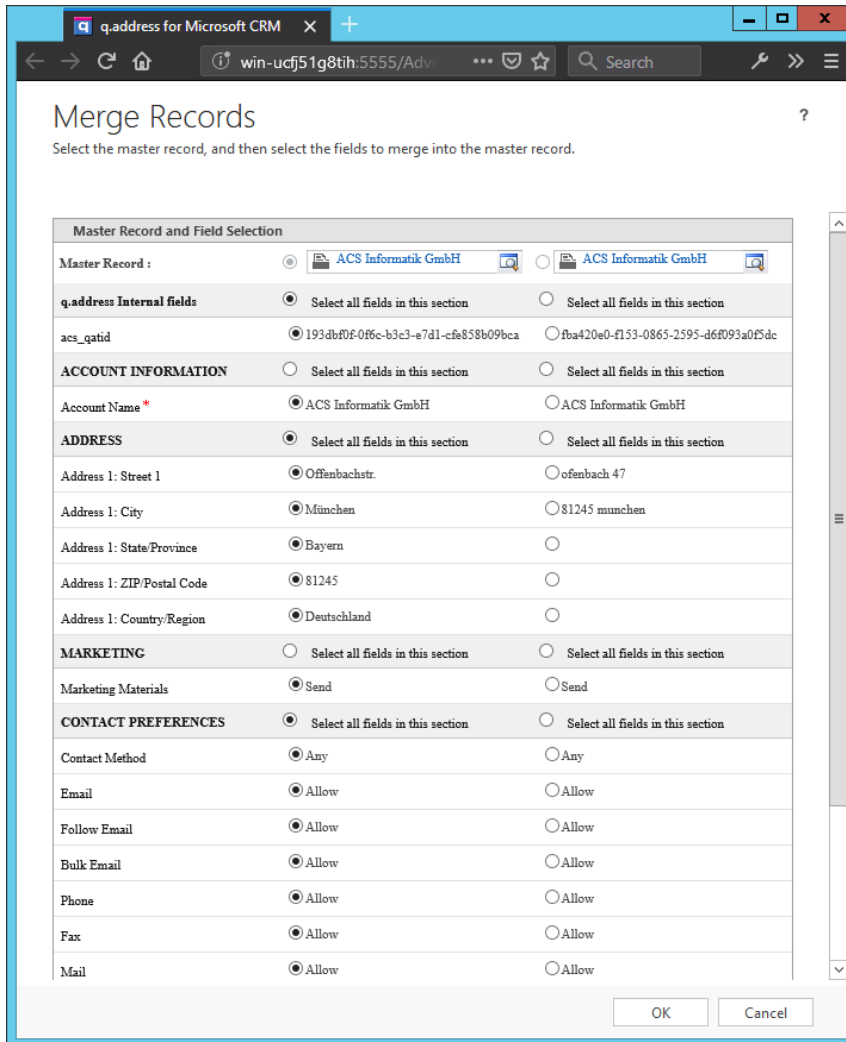


Fig. 5-3 – q.address Merge dialog.

The q.address Merge dialog corresponds to the analogous dialog of Dynamics 365. It is used in the same way.

It will merge your original address with the address you selected from the duplicate search results (Figure 5-2). If you were creating a new address, the data for the new address are used to be merged with the address you selected from the duplicate search results. If you were editing an existing address, this address and the address you selected from the duplicate search results will be merged into one single address. All dependent data such as Contacts, Sales Opportunities, Invoices, Custom Entities etc. will be merged as well, you do not lose any data.

6 Individual Address and Duplicate Check

In addition to address and duplicate checks, which are automatically carried out in the background when objects (Accounts, Contacts, Leads etc.) are edited or newly entered, you can also explicitly request address checks for an individual existing address.

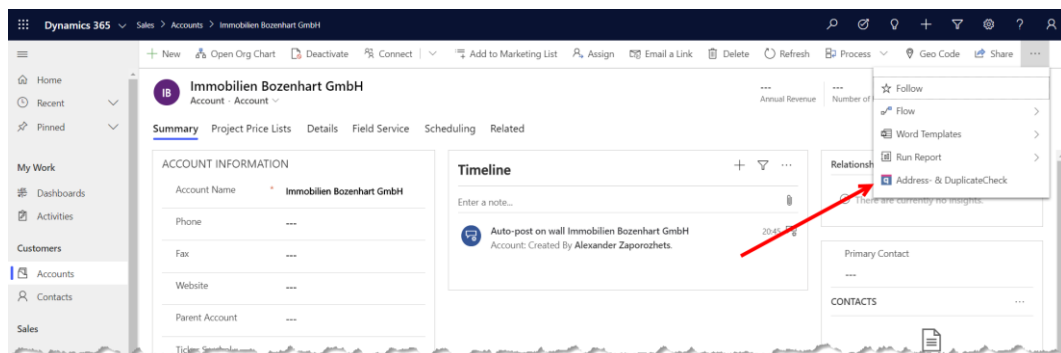


Fig. 6-1 – Request an address and duplicate check for existing object (Account, Contact, Lead, etc.).

The check is carried out in complete analogy to the checks described in the address maintenance (section 5). Please refer to the instructions in section 5.

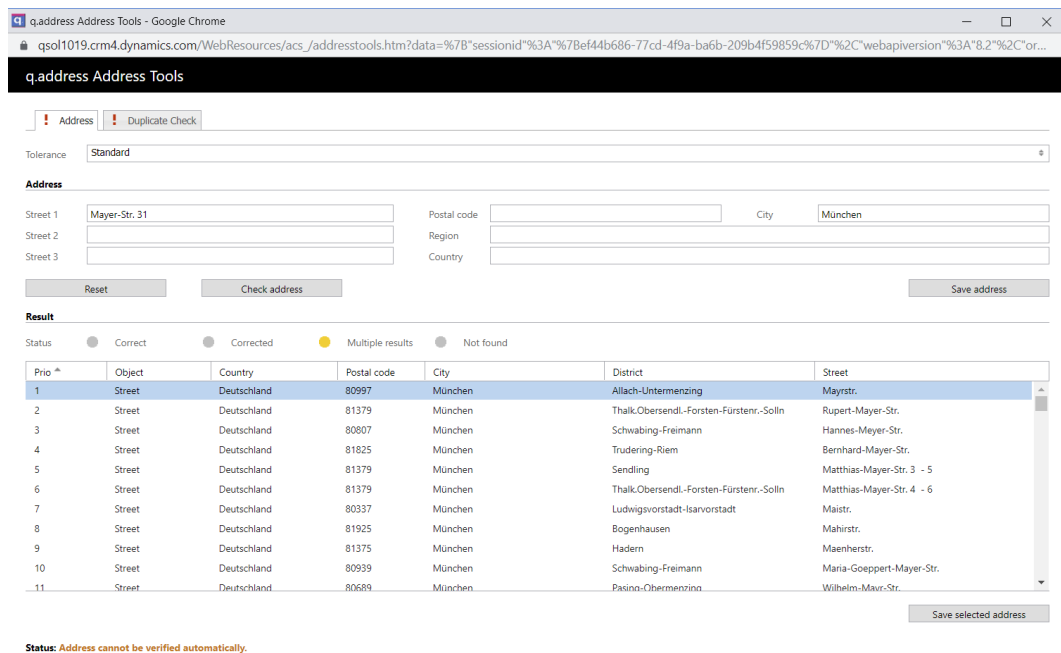
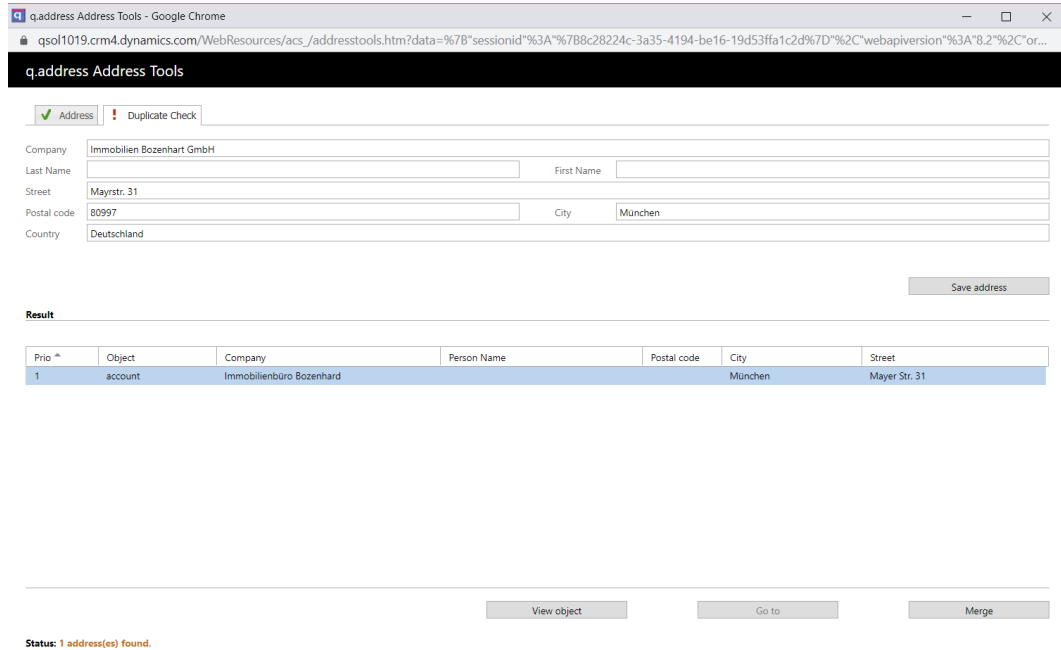


Fig. 6-2 – q.address AddressCheck dialog: There are two tabs, one for viewing and editing the postal address, the other with the result of the duplicate check. C.f. section 5.



q.address Address Tools

Address
 Duplicate Check

Company: Immobilien Bozenhart GmbH

Last Name: First Name:

Street: Maystr. 31

Postal code: 80997 City: München

Country: Deutschland

Save address

Result

Prio ^	Object	Company	Person Name	Postal code	City	Street
1	account	Immobilienbüro Bozenhard		München	München	Mayer Str. 31

View object Go to Merge

Status: 1 address(es) found.

Fig. 6-3 – q.address DuplicateCheck dialog: There are two tabs, one for viewing and editing the postal address, the other contains the result of the duplicate check. C.f. section 7.

7 Periodic Quality Assurance

In addition to the permanent monitoring of address maintenance with the q.address Add-on, it is advisable to carry out a check of the entire database at regular intervals. Postal codes and street names change, errors creep in because users make mistakes or overlook things.

q.address Stand-alone 365 is a very powerful tool that checks the address quality in Dynamics 365 Customer Engagement and can also correct and clean up directly in the CRM (“in-place cleansing”). This also includes the merging of all dependent data such as Contacts, Sales Opportunities, Invoices, etc., but also custom entities. (Cf. Section 1.3)

8 About Dialog

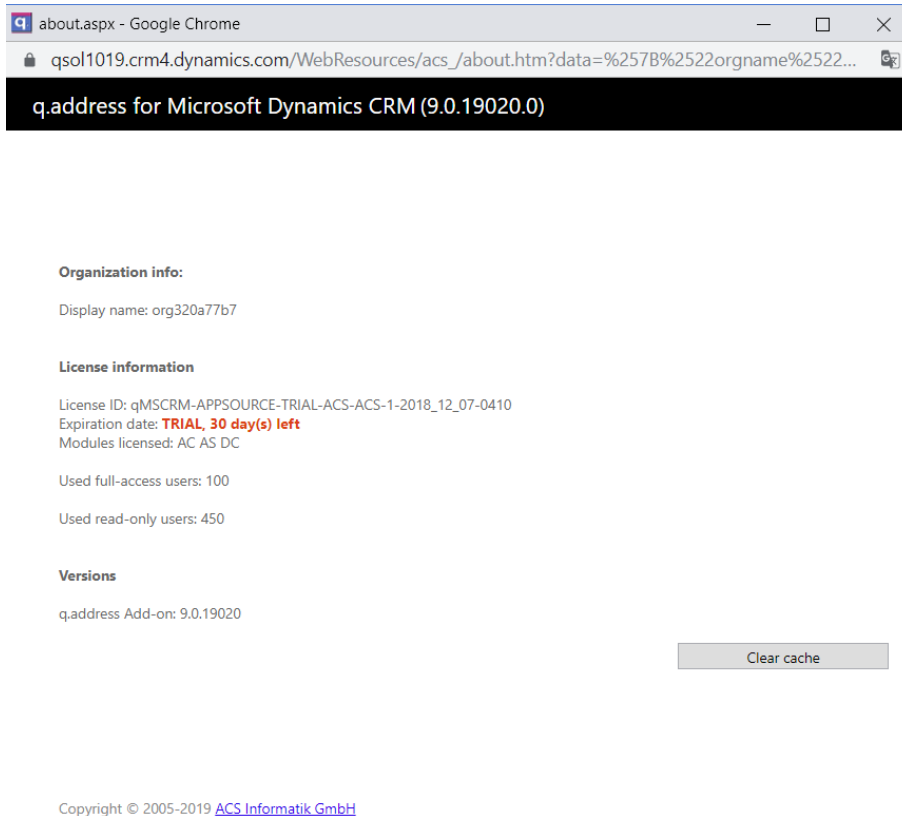


Fig. 8-1 – About the q.address Add-on.

The About Dialog shows the version of the q.address Add-on and some additional useful information.

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