

Installing Data8 CRM TPS Compliance



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Obtaining your API Keys

The Data8 TPS Compliance solution requires 2 keys – a client side ajax API key and a server API key. You can obtain both of these by going to <https://www.data-8.co.uk/ValidationAdmin/AjaxAPIKey> and clicking “Add API Key”.

Client Side API Key

For the client side key you need to select “I will use it on a Website”.

Enter a useful description for the key, e.g. “TPS Compliance Client Side”.

Click the “+” button next to “Allowed Domains” and enter the domain name of your CRM instance. If you are using an on-premise CRM instance that you use a different domain name for external IFD connections, repeat this process for both the internal and external DNS names.

Click Save and your new API Key will be shown in the list.

Server API Key

For the server side key you need to select “I will only use it from Server”.

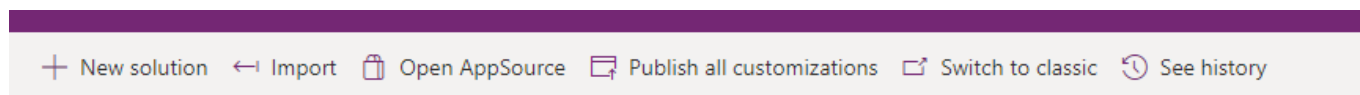
Enter a useful description for the key, e.g. “TPS Compliance Server Side”.

Click Save and your new API Key will be shown in the list.

Installing the solution

AppSource should always be the preferred method of installation, <https://appsource.microsoft.com/>, however you can choose to install the solution manually should you wish and you will have been provided with a zip file containing the company information solution.

To install it, navigate to <https://make.powerapps.com/> and use the environment selector on the top right to ensure you're in the correct environment. Once you are in the correct environment, select "Solutions" from the bottom of the left-hand column. This will change your page and you should have an "Import" button at the top to start the installation.



Click "Import" 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.

Configuring the TPS system

The Data8 TPS solution includes a custom model driven app that can speed up the set up. The app is called “Data8 TPS Compliance Configuration” and by opening this, you have a place to store all required credentials quickly.

After the “Loading” message has finished, you will be shown a screen to enter your license details.

Initial Configuration

Here you will need to enter 2 API keys, one website one (for your immediate update) and one server one (for your commit on save and update).

In order to access your API Keys, please access your [Data8 dashboard](#). When creating a new key, you will be asked if you want your key to be a website key or a server key

When you make the website key, you will need to add a domain - just enter the URL of the system you are configuring.

Paste the API keys into the relevant boxes and click save.

Field Configuration

To add a custom configuration, you will need to select the table. If you have configured TPS or CTPS for at least one column in a table, the table will be listed with a “Reconfigure” button. If not, click to “Add a TPS configuration for” and select the relevant table. Either pressing “Reconfigure” for existing or “Add” for a new table will take you to the same page.

Entity Types

Configure your entities and fields for TPS checking below or click **Reconfigure** to edit an existing configuration.

Accounts

Reconfigure

Add TPS configuration for

Addresses

Add

Once your page has reloaded, you will see a list. The basic idea is to map a telephone column to a status column and assign a relevant icon in order to display it in a friendly manner on the form.

Under “Add New Mappings”, the following are your options:

- **Source Field** – This is the column that contains the phone number you wish to TPS/CTPS check
- **Target Field** – This is the column you will store the TPS/CTPS. This field must be defined using the existing choice “data8_tps_status”.
- **Icon** – This is the Office UI Fabric Icon you wish to show in the grid. For more information, please refer here: <https://uifabricicons.azurewebsites.net/>

Each time you add a new mapping and save, the page will reload to confirm.

You also have some more advanced settings to set on this page.

- **TPS Override Lookup** – If you are storing your TPS overrides within your system, this is the lookup column to the related row. Any lookup column that is a lookup of type “data8_tpsoverride” will appear in this list. The “TPS Override Lookup” column is optional.
- **Last Checked Date** – The last checked date is a date time column that just stores the last time this row was TPS/CTPS checked through the Data8 batch tool. Any date time column will be selectable here. The “Last Checked Date” is optional.

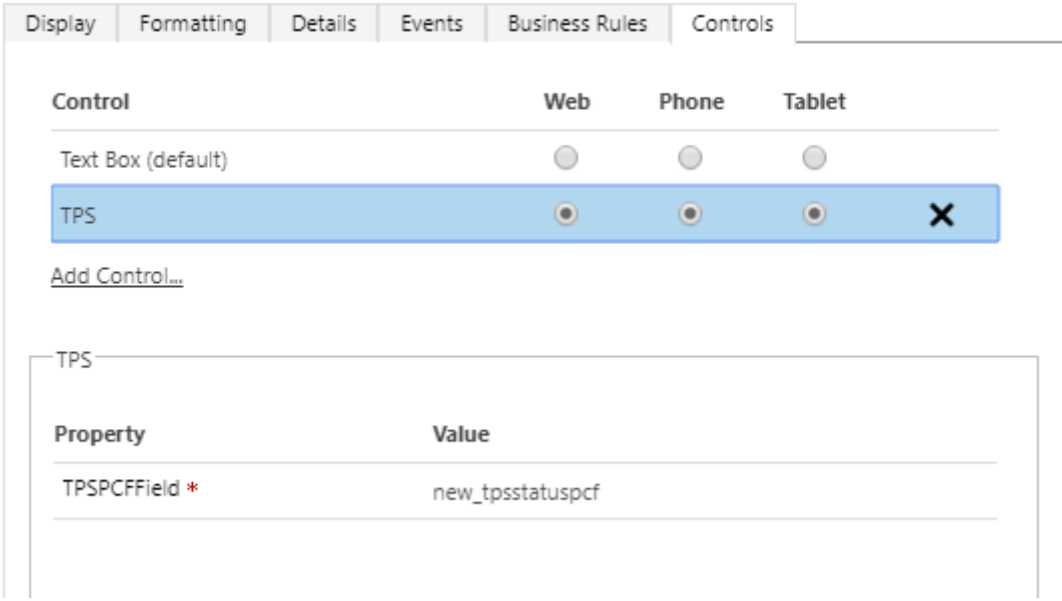
Setting up how to view TPS and CTPS status

Included within the Data8 TPS solution is an easy way to visually see all TPS and CTPS statuses from any form by using a custom control.

You will need a column on the form that is unused – you could either make a new column or select an unused column. The value of this column will not be used but due to the nature of the control and how it displays data from a number of columns, it has to be set up in this way.

Using the classic form editor, you can assign custom controls to any column – within the TPS solution is a `TPS` custom control which can be used on a custom column to quickly show the TPS status of mapped numbers.

From here you can just save and publish your form.



Security Roles

We recommend any of your users who will be required to TPS check to have the “Data8 TPS User” security role assigned to their account. This will ensure they can read the correct configuration when viewing or amending a row.

Customised Configuration

Should you want to use your own methods, you can do so using the following steps.

The imported solution includes a custom entity type called “TPS Check”, found in the classic Settings section of the CRM interface, that performs the TPS and CTPS checks. You can also add it to your own model driven app.

To check a number, create a new TPS Check row, enter the telephone number to check, your Data8 username and password and select whether to check the number against TPS, CTPS or both. Save the row and the following additional attributes will be filled out:

- **On TPS / On CTPS** – indicates if the number was found on either the TPS or CTPS
- **TPS Check Time / CTPS Check Time** – indicates the time at which the number was checked for auditing purposes
- **Callable** – indicates if the number is allowed to be called, i.e. not on TPS or CTPS

You can perform ad-hoc TPS and CTPS queries by creating a TPS Check record manually, but it is recommended that you set up automated workflows to perform these checks automatically as required by the business processes.

Keeping your system up to date

As well as real time updates from your phone numbers, the TPS solution offers the ability to keep up to date with your TPS checking if you are licensed to do so.

Initial Set Up

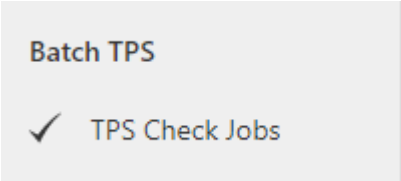
In order to automatically keep your system up to date, the first step you will be required to do will be to set us up with an active CRM connection. This doesn't need to be a user, it can be a service account. For more information and steps on how to configure this, please [visit this page](#).

Once this is configured, please return to the "Data8 TPS Compliance" model driven app which is included in the solution.

Please ensure any user wanting to use batch TPS jobs has the "Data8 Batch TPS User" security role.

TPS Check Jobs

You can run on demand jobs to TPS and CTPS check all, or some, records in your system. You do this by using the "TPS Check Jobs" table included in the solution.



By creating a new row of this table, you are telling the Data8 integration you wish to do a mass update.

New Batch TPS Check Job - Unsaved

Pending Status | New Status Reason

General

Job Name	*	---
Entity Name		---
Saved View Filter		---
Bypass Count Step	<input type="checkbox"/>	No
Created On	---	

Simply by entering a job name, the entity (table) name, an optional saved view filter you can tell the system what you would like to check - for example "Active accounts".

The standard user flow of a batch job is a two step approach:

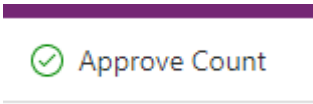
- 1) An audit will be ran that will confirm the amount of credits required for this job
- 2) The batch check will run, charging the credits calculated from the first step once approved

By setting "Bypass Count Step", you will skip step 1 and automatically be charged for the credits.

Once you create a record, the status will say "Pending" and you'll have an alert to wait for Data8 to pick up the job. Once Data8 pick up with the job, the status and the alert will up again. Finally, once Data8 have finished the initial audit, it will have an "Awaiting Approval Status" with a new section visible, with a breakdown of the credit count required.

Audit Results	
🔒 Count Completed On	1/31/2022 📅 2:12 PM
🔒 Credits Required	13

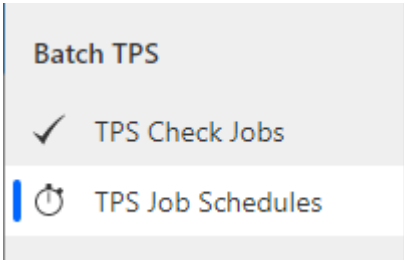
If you are happy with the credits required count, please click "Approve Count" in the ribbon.



The same process will then run through, although this time your records will be checked and have their status updated accordingly.

Scheduling TPS Check Jobs

You can set up a schedule to automatically create a batch job on a schedule of your choosing. The schedules can be found under the table "TPS Job Schedules".



Creating a new schedule will give you the following options.

General

Name	+ ---	
Created Job Name Prefix	---	
Entity Name	---	
Filtered View	---	
Bypass Count Step	<input type="checkbox"/> No	
Frequency	---	
Next Run Time	---	
Last Run Time	---	

By putting the settings in here, they will be copied across to each automatically created batch job. You can input your initial "Next Run Time" and the system will then handle it moving forward.