

# Installing Data8 PredictiveAddress for Microsoft Dynamics 365/CRM

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## Obtaining an API Key

To obtain an API key for PredictiveAddress, please follow these steps:

1. Go to <https://www.data-8.co.uk/dashboard/api-keys/>.
2. Click "Add API Key"
3. Give the API key a name and save it.
4. Once saved, the "Allowed Domains" section will be editable.  
Enter the domain you wish to authorise and click "Add". For example, if you go to <http://contoso.crm.dynamics.com/> to access your CRM system, enter "contoso.crm.dynamics.com".  
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.
5. Copy the API key for use later on.

### Edit Server API Key: [REDACTED]

**Description**

A short description of this API Key's intended use for your own reference.

**Key Type (Calculated)**

Add an allowed domain to change key type.

Server-side  Client-side

**Allowed Domains**

This specifies the list of domains that this API Key can be used from. This must be the exact, full domain name of the website that the key will be used on. If it is used on example.com and www.example.com, both versions must be listed here. You can also use \* as a wildcard for subdomains, e.g. \*.example.com.

Domain

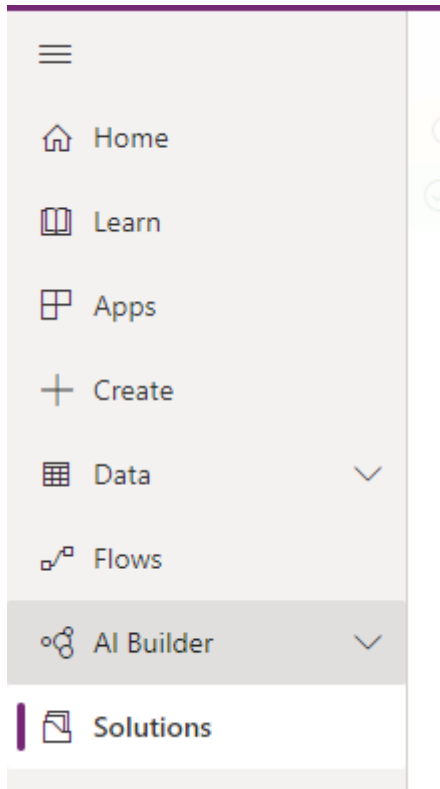
**Allowed IP Addresses**

This specifies the list of which of IP addresses which can use the API key. This is the IP address that the request to our API comes from. For server-side requests this is the IP address of the server, and for client-side requests this is the IP address of the

## Installing the solution

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

You will have been provided with a zip file containing the postcode lookup solution. To install it, open <https://make.powerapps.com>, ensure you're in the right environment in the top right of the page and navigate to "Solutions" on the bottom of the left nav bar.



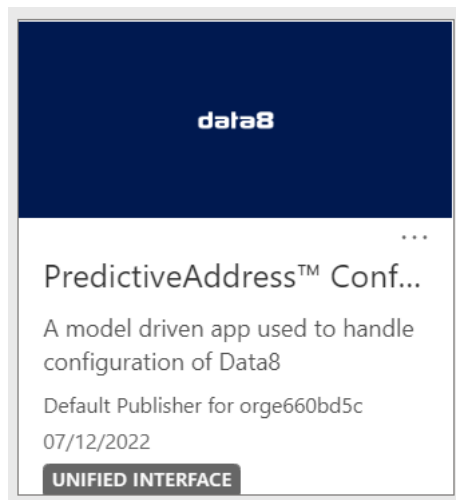
Click "Import" and select the zip file you have been sent, and then click "Next".

Click "Next" again and the solution will be imported.

Click "Close" and the solution has now been imported.

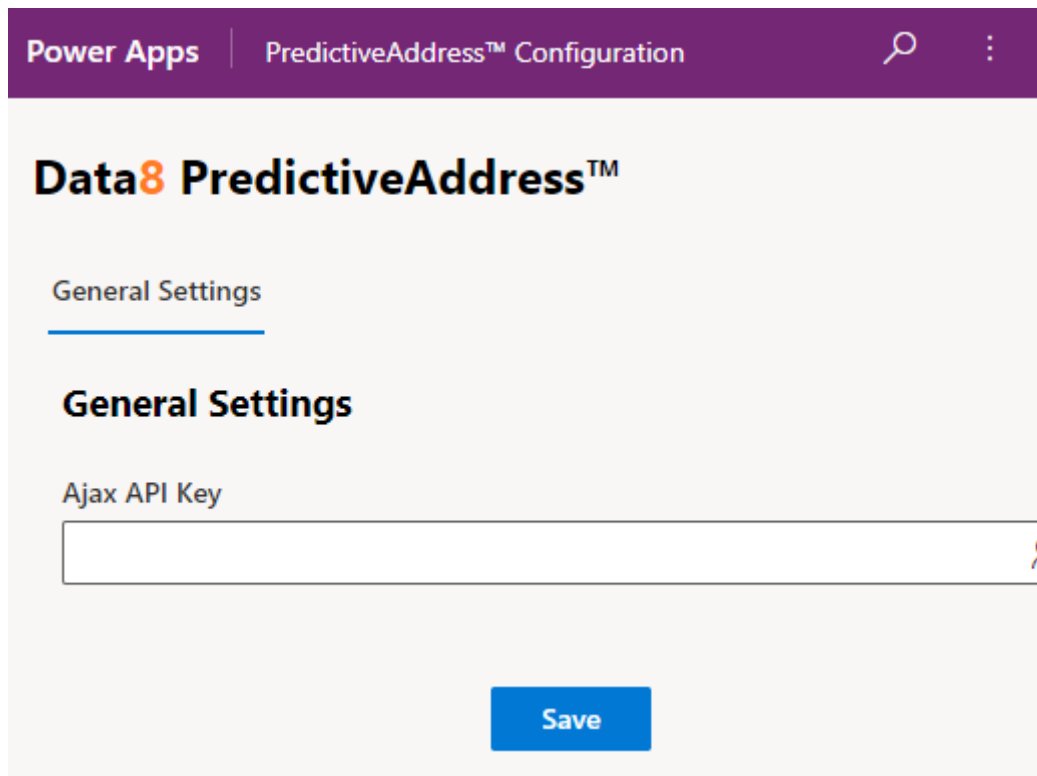
## Initial Configuration of the solution

Once installed, navigate to your list of “Apps” and open the app called “PredictiveAddress™ Configuration”.



You will be shown a screen to enter your Ajax API Key you retrieved earlier.

Enter your API key you took from the Data8 website earlier and click “Save” before refreshing the page.

A screenshot of the 'PredictiveAddress™ Configuration' app settings screen. The top navigation bar is purple and contains the text 'Power Apps | PredictiveAddress™ Configuration' on the left, a magnifying glass icon, and a three-dot menu icon on the right. Below the navigation bar is the title 'Data8 PredictiveAddress™'. Underneath the title is the section 'General Settings' with a blue underline. Below this is the heading 'General Settings' in bold. Underneath is the label 'Ajax API Key' followed by a large, empty text input field. At the bottom center of the screen is a blue button with the text 'Save' in white.

## Configuring PredictiveAddress - Global

The main tab of the configuration page allows for a multitude of global options to be set. Please refer to the Data website for specific detail on them all.

**Data8 PredictiveAddress™**

General Settings   Entity Types

### General Settings

Ajax API Key  
T4TE-IHHA-VYP7-IWSJ

County data type: Postal County   Town formatting: Upper Case

- Include Not Yet Built addresses (UK Only)
- Include Multiple Residency addresses (UK Only)
- Return abbreviations i.e. Rd for Road (US Only)
- Return the latitude and longitude of the entered what3words.
- Enable the "Use My Location" feature when inputting an address

Please note that these options require specific licensing - only turn these on under the guidance of your account manager.

Show PredictiveAddress™ International Settings

You now need to set up specific configurations for each address grouping.

**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 customization" section below

## Configuring address specific 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.

General Settings   Entity Types

### Entity Types

Add PredictiveAddress™ configuration for  
Accounts   Add

Note: After adding PredictiveAddress™ configuration you will also need to add a custom control to your form. Please follow the steps on the "Form Configuration" tab and refer to supporting documentation for guidance.

If you are adding postcode lookup to an entity that has standard 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 below, 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.

### Data8 New Configuration for Accounts ×

Quick Configuration

Select a set of address fields from the list below to set up a default configuration for that address

Address 1 ▼ Configure

Manual Configuration

If the address fields you require are not show in the list above you can configure the details manually.

Manual Cancel

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 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 PredictiveAddress 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.

The screenshot shows a configuration window titled "Data8 New Configuration for Accounts". It is divided into two main sections: "Organization" and "Address Fields".

**Organization Section:**

- A dropdown menu for "If an address contains an organization name" is set to "Place it in a separate field".
- An "Organization Field" dropdown is set to "Address 1: Name".
- Two checkboxes are present: "Auto-complete in this field as well as Address 1" (unchecked) and "Ignore returned organization if field is populated" (unchecked).
- Text: "Select the fields in which to place the main part of the address. Drag the fields into the order you want to see the address filled in".
- A checkbox "Keep town and county in last two fields" is checked.

**Address Fields Section:**

- Available Fields:** Account Name, Account Number, Address 1: Country ISO, Address 1: Country/Region, Address 1: County, Address 1: Fax, Address 1: Name.
- Selected Fields:** Address 1: Street 1, Address 1: Street 2, Address 1: Street 3, Address 1: City, Address 1: State/Province.
- A "Postcode" dropdown is set to "Address 1: ZIP/Postal Code".

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 – we generally recommend this approach, particularly for UK addresses.

When you are happy with the layout of your address fields, click "Save" at the bottom of the page

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.

The “Advanced Address Settings” section can be left as it is unless we advise you otherwise as this is calculated automatically by the “fields” section configured above. However, some fields which may be of interest in here are the “Latitude” and “Longitude” fields, and the “Last Update” field.

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



## User Interface

The Data8 PredictiveAddress tool is implemented 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. In this example we are going to call it “Data8 Predictive Address JSON string” but you can call it whatever you want.

#### New column

Previously called fields. [Learn more](#)

Display name \*

Description ⓘ

Data type \* ⓘ

Format \*

Behavior ⓘ

Required ⓘ

Searchable ⓘ

Advanced options ^

Schema name \* ⓘ

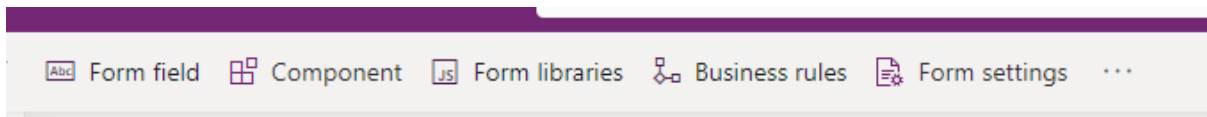
Maximum character count \*

Next open the form editor you wish to add PredictiveAddress onto. 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. You will know if it's the composite grouping because when you select line 1, the complete address will be highlighted like so:

Address 1: Street 1	---
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---
Address 1: State/Province	---
Address 1: ZIP/Postal Code	---
Address 1: Country/Region	---

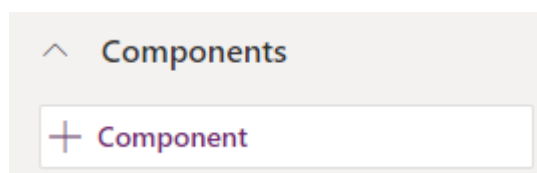
Remove the composite and add the fields one by one instead. You also need to add the custom field you made on the previous page – although you can choose to hide this field.



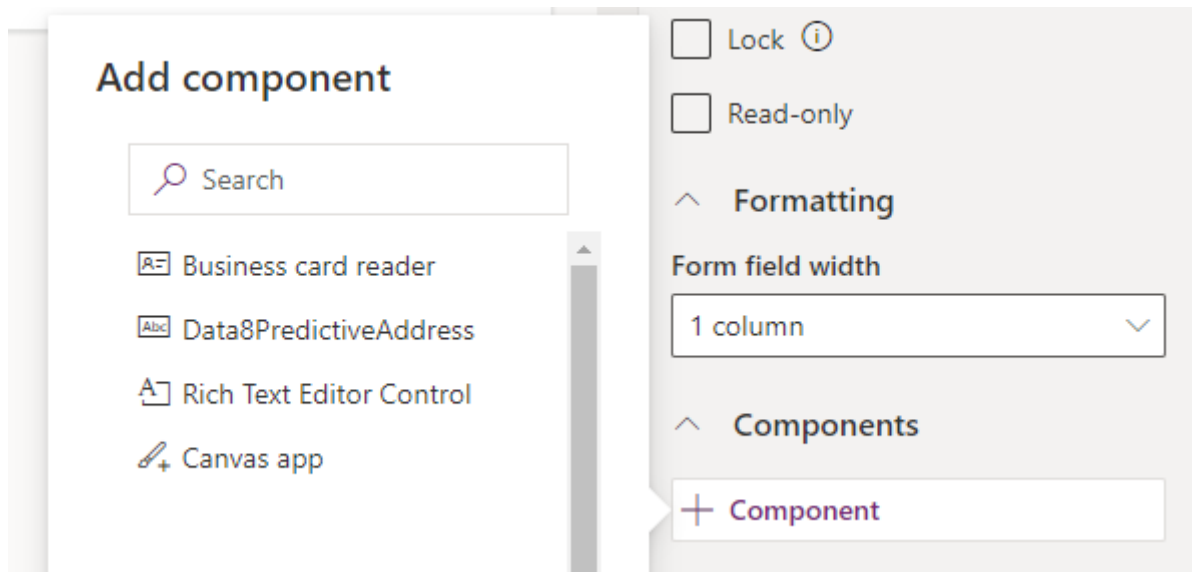
This is how it should look – note you may have different address fields and this is fine.

Address 1: Street 1	
Address 1: Street 2	---
Address 1: Street 3	---
Address 1: City	---
Address 1: State/Province	---
Address 1: ZIP/Postal Code	---
Data8 Predictive Address JSON string	---

You now need to replace the default control with the custom control provided by Data8. Highlight the line 1 of your address and then look to the bottom right of the screen and you'll see a "Components" section. Expand it so you see the option to add a component.



You'll see several options here – you want to select "Data8PredictiveAddress".



Once you select that option, you have a few final things to populate.

## ← Add Data8PredictiveAddress

InputValue ⓘ

Table column \*

Address 1: Street 1

FieldName ⓘ

Bind to table column

Static value \*

address1\_line1

ResultValue ⓘ

Table column \*

Data8 Predictive Address JSON s... ▾

Show component on

Web

Mobile

Tablet

Done

Cancel

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

“FieldName” is designed to help the control know which address grouping you are using. In the “Static value” text box you need to enter the logical name of the line1 element of the address – in this case, address1\_line1.

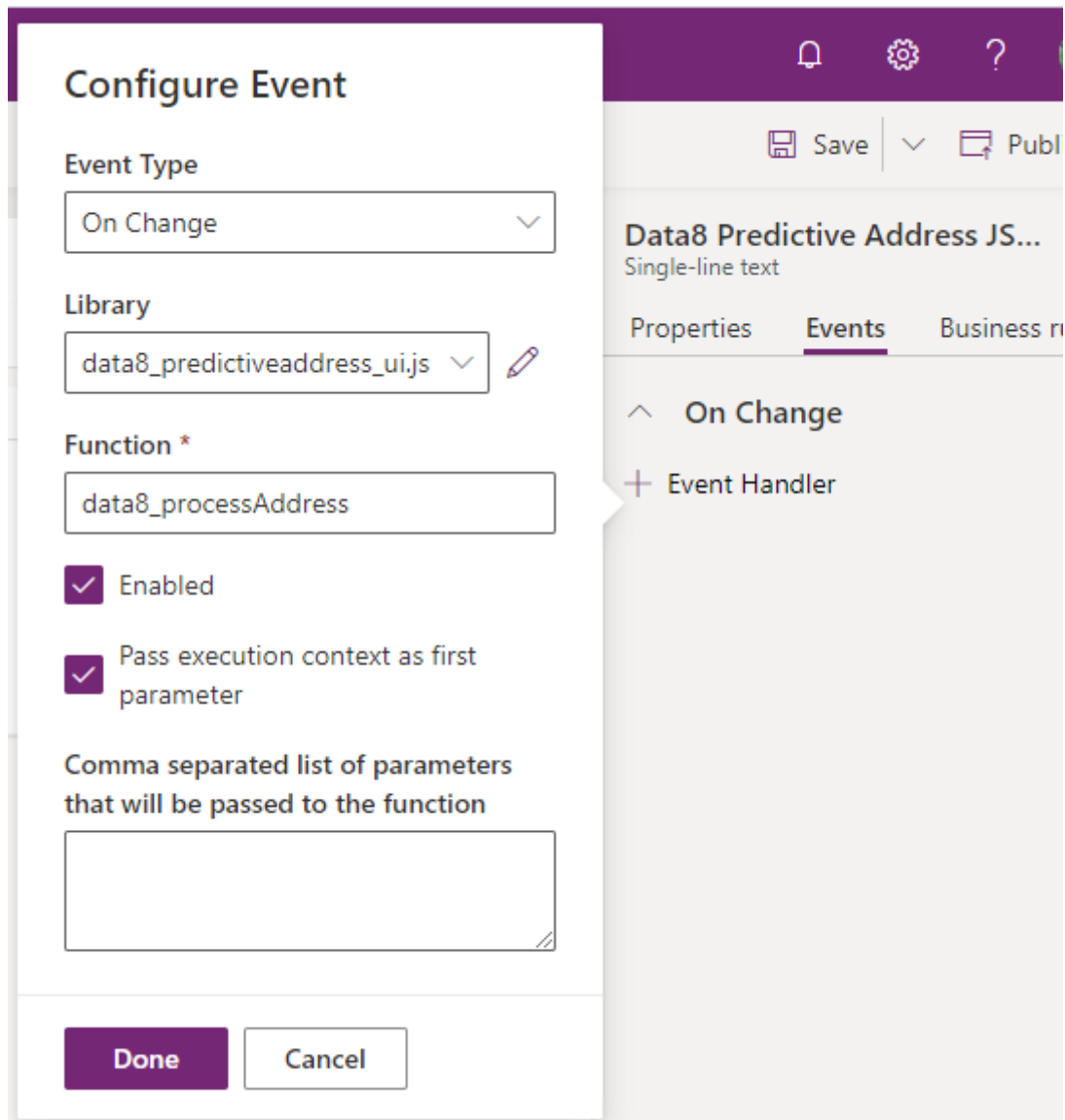
“ResultValue” is designed to help set all the address fields when a user has selected an address. This should be set to the column you made a few pages ago – in this case, our Predictive Address JSON string.

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

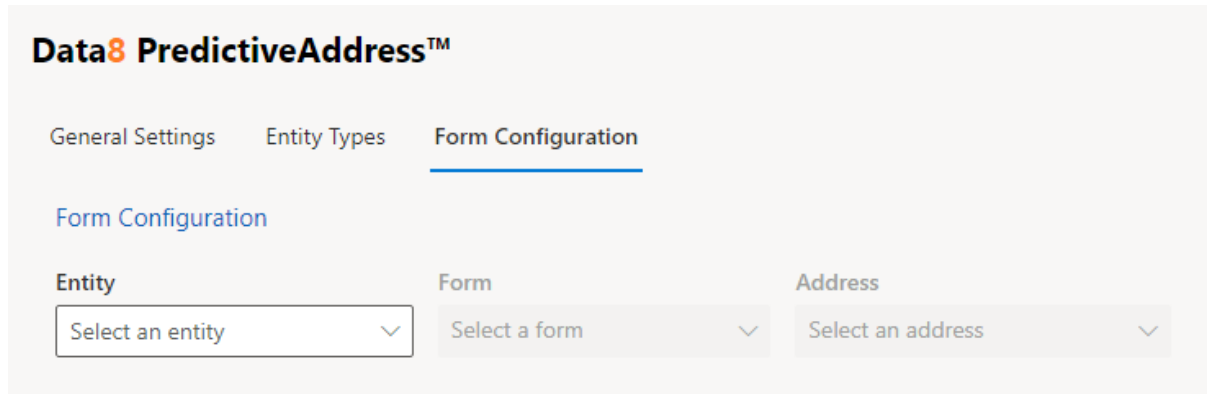
1. Add “data8\_predictiveaddress\_ui.js” to the form
2. Add an Event Handler to the custom field we made earlier – the event handler is called “data8\_processAddress”. Ensure the “Pass execution context as first parameter” option is ticked.
3. Save, publish and close.



After all these steps are completed, your address should start auto populating. Please see the next section, Checking Form Progress, if you are having configuration issues.

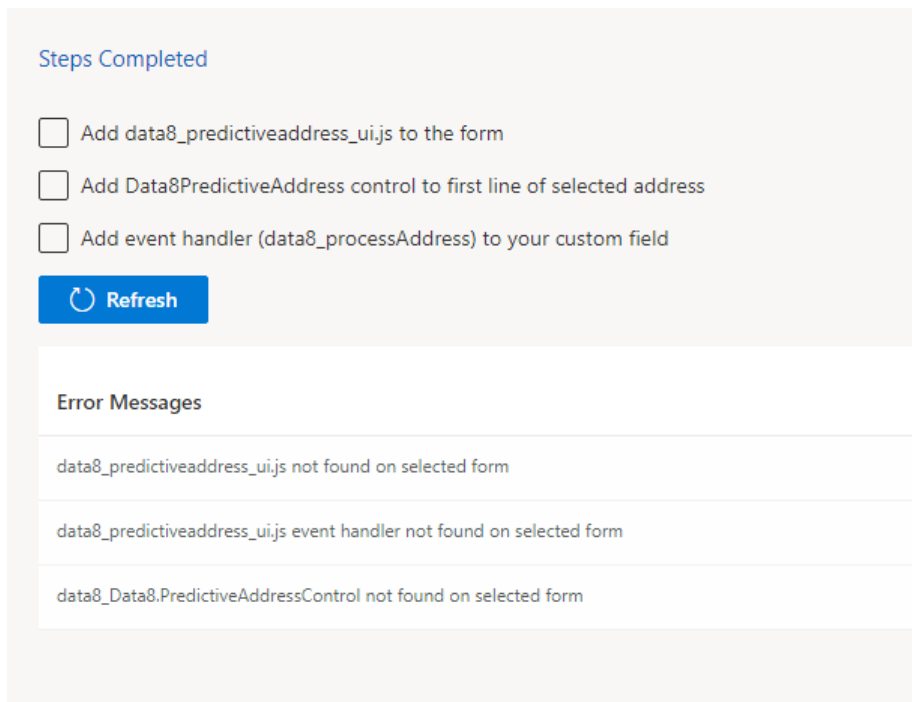
## Checking Form Progress

Once you have completed the steps outlined above, you can check that your form has been configured correctly by returning to the configuration and page and navigating to the “Form Configuration” tab.



The screenshot shows the 'Data8 PredictiveAddress™' configuration page. At the top, there are three tabs: 'General Settings', 'Entity Types', and 'Form Configuration', with the latter being the active tab. Below the tabs, the page title 'Form Configuration' is displayed. There are three dropdown menus: 'Entity' with the text 'Select an entity', 'Form' with the text 'Select a form', and 'Address' with the text 'Select an address'. All dropdowns have a downward arrow icon.

From here you can select an entity, a form, and an address from the dropdowns and the automated checks will provide a list of errors and steps yet to be completed, if any have been missed.



The screenshot shows a section titled 'Steps Completed' with three unchecked checkboxes and their corresponding instructions:

- Add data8\_predictiveaddress\_ui.js to the form
- Add Data8PredictiveAddress control to first line of selected address
- Add event handler (data8\_processAddress) to your custom field

Below the list is a blue 'Refresh' button with a circular arrow icon. Underneath is a section titled 'Error Messages' with three error messages listed in a light gray box:

- data8\_predictiveaddress\_ui.js not found on selected form
- data8\_predictiveaddress\_ui.js event handler not found on selected form
- data8\_Data8.PredictiveAddressControl not found on selected form

If all automated checks pass and you still have configuration issues, please contact [helpdesk@data-8.co.uk](mailto:helpdesk@data-8.co.uk)

## **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.