Installing Data8 PredictiveAddress for Microsoft Dynamics 365/CRM

Contents

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.

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.
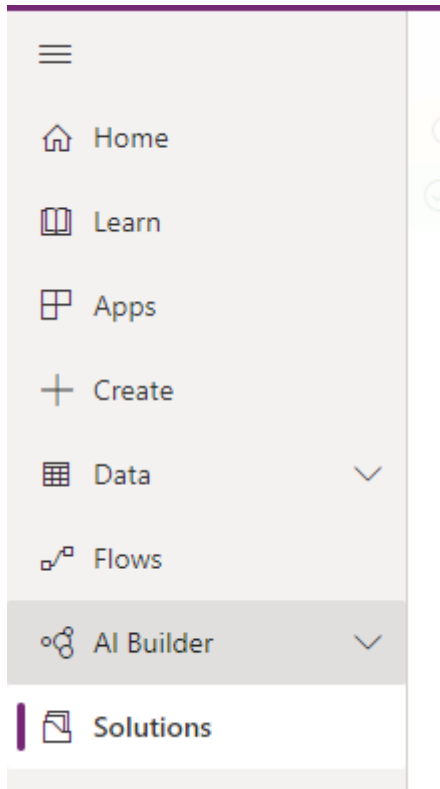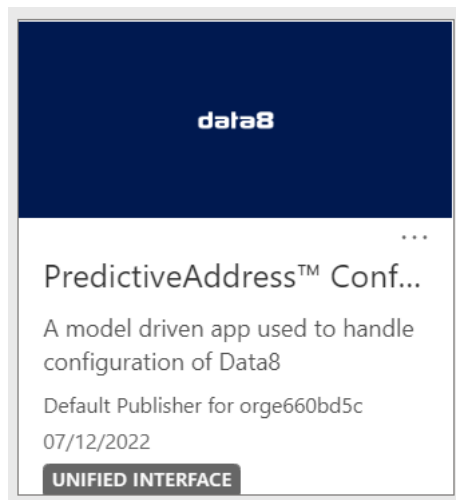

Click "Import" and select the zip file you have been sent, and then click "Next".

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

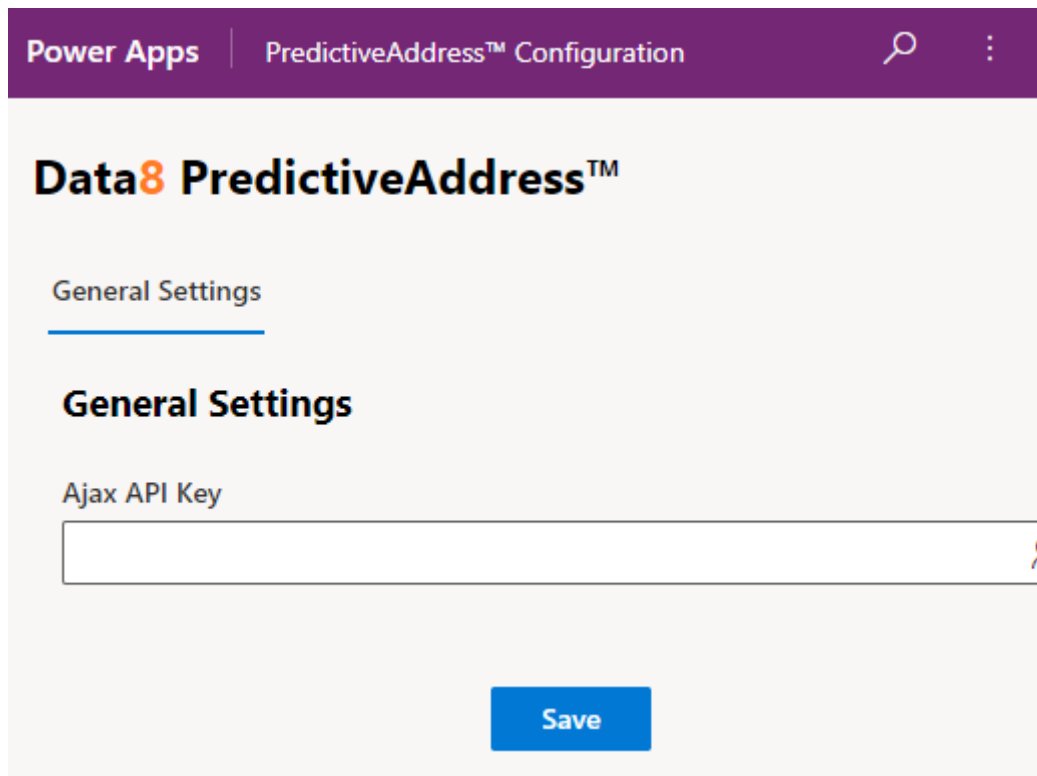Click "Close" and the solution has now been imported.

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.

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.

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.

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.

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 *

Data8 Predictive Address JSON string

Description ⓘ

A field to assist with the Data8 PredictiveAddress solution for autocompleting addresses.

Data type * ⓘ

Abc Single line of text ⌄

Format *

Abc Text ⌄

Behavior ⓘ

Simple ⌄

Required ⓘ

Optional ⌄

✔ Searchable ⓘ

Advanced options ⌃

Schema name * ⓘ
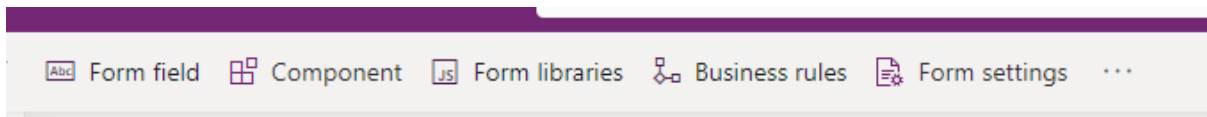
crfc6_ Data8PredictiveAddressJSONstring

Maximum character count *

500

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:


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.

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.
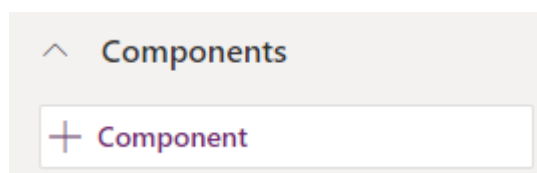
You'll see several options here – you want to select "Data8PredictiveAddress".
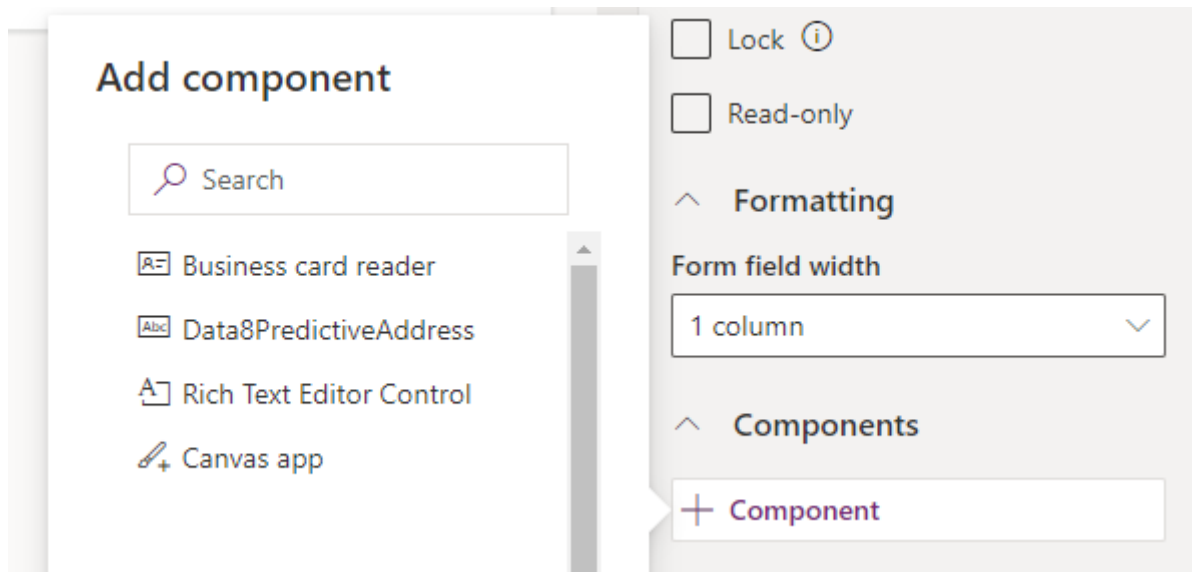
Once you select that option, you have a few final things to populate.

"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.
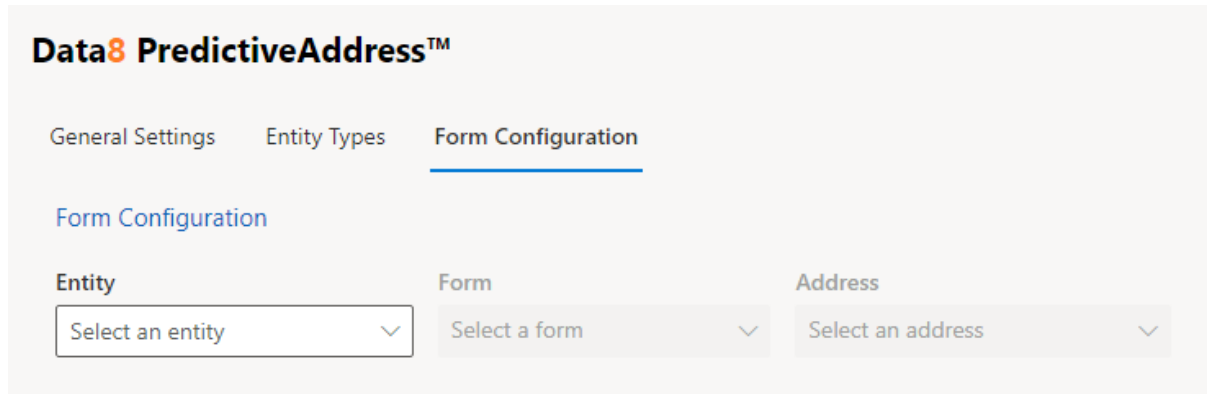
1. Add "data8_predictiveaddress_ui.js" to the form
2. Add an Event Handler to the custom field we made earlier – the event handler is called "data8_processAddress". Ensure the "Pass execution context as first parameter" option is ticked.
3. Save, publish and close.
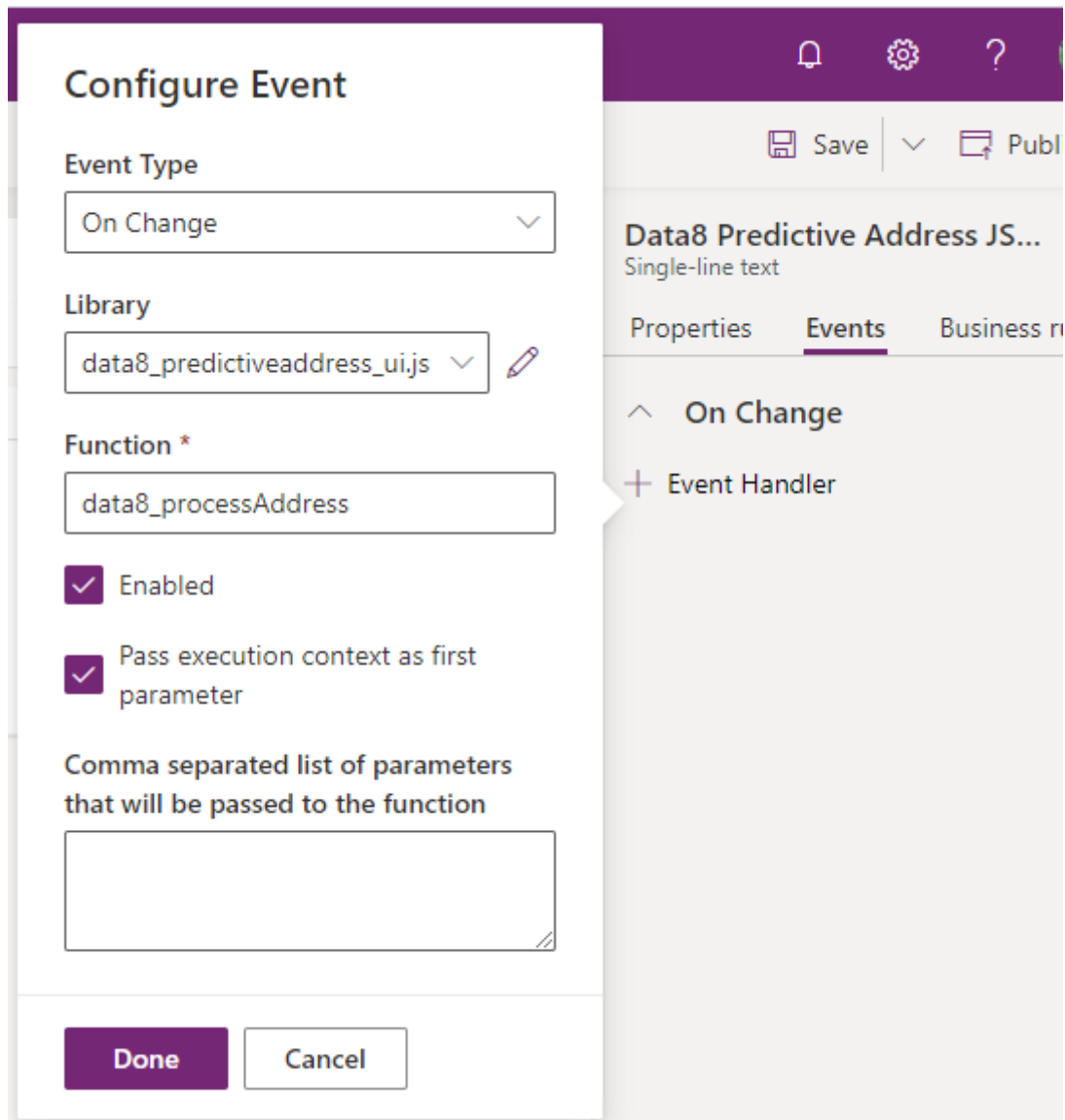
After all these steps are completed, your address should start auto populating. Please see the next section, Checking Form Progress, if you are having configuration issues.
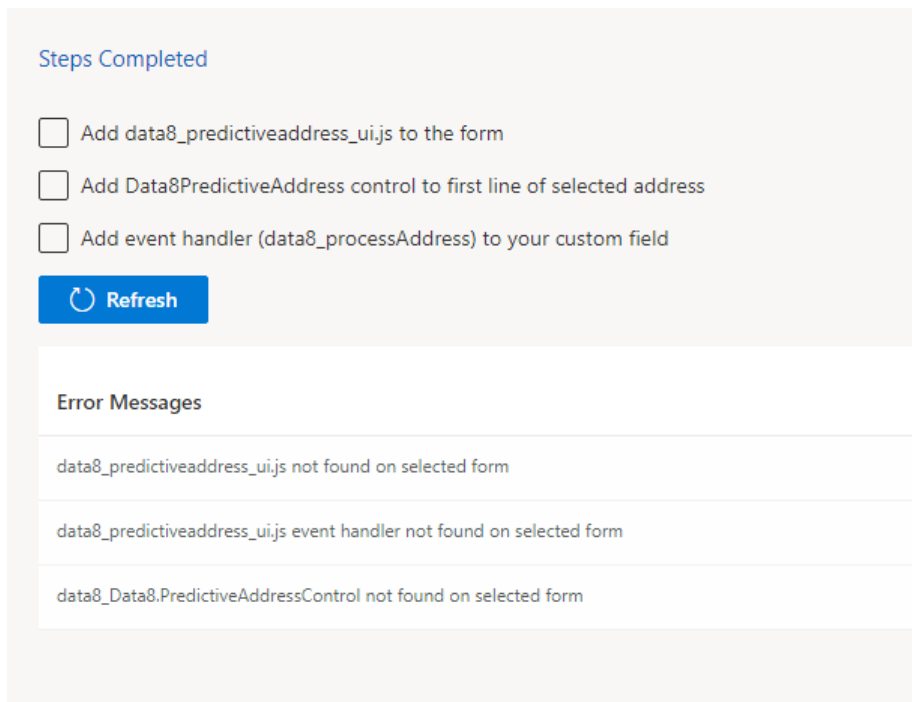
Checking Form Progress

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.

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.

If all automated checks pass and you still have configuration issues, please contact 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.