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Installing Data8 Bank Account Validation for Microsoft Dynamics CRM 365

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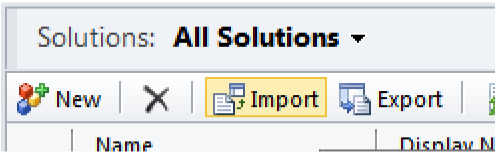
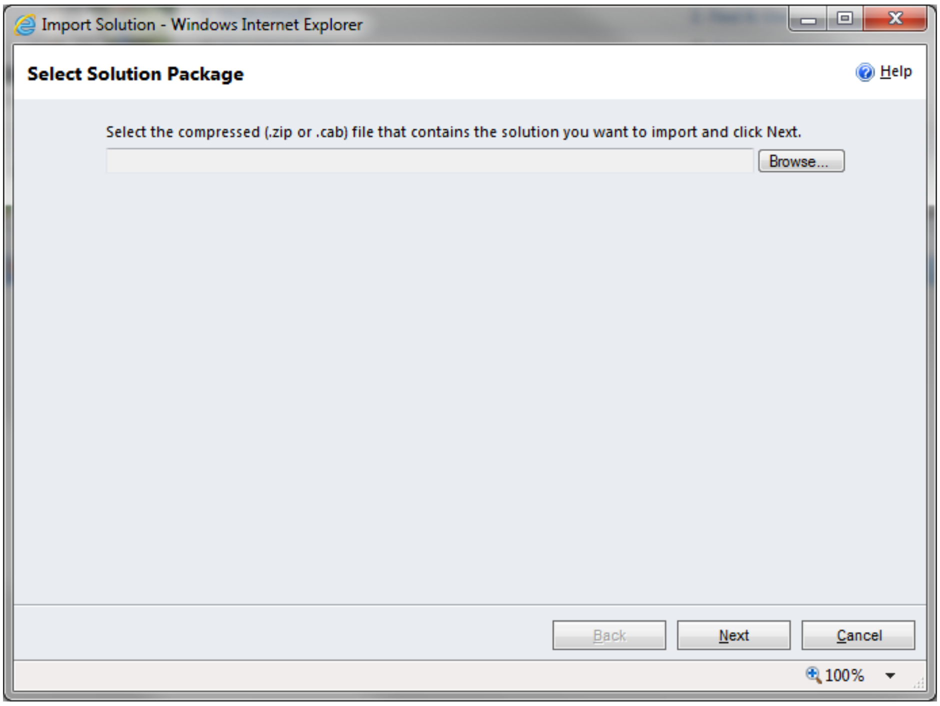
data8

Installing the solution

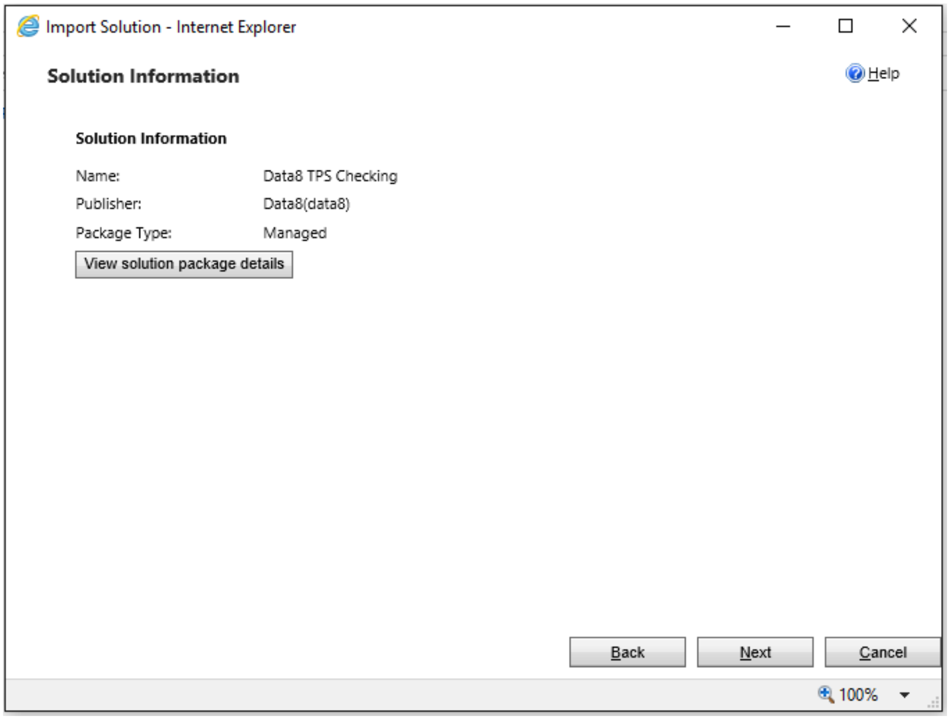
You will have been provided with a zip file containing the solution. To install it, open Microsoft Dynamics CRM and go to Settings > Solutions. Click “Import” to start the installation.

NOTE: Screenshots are for a different product by Data8 but steps remain the same.

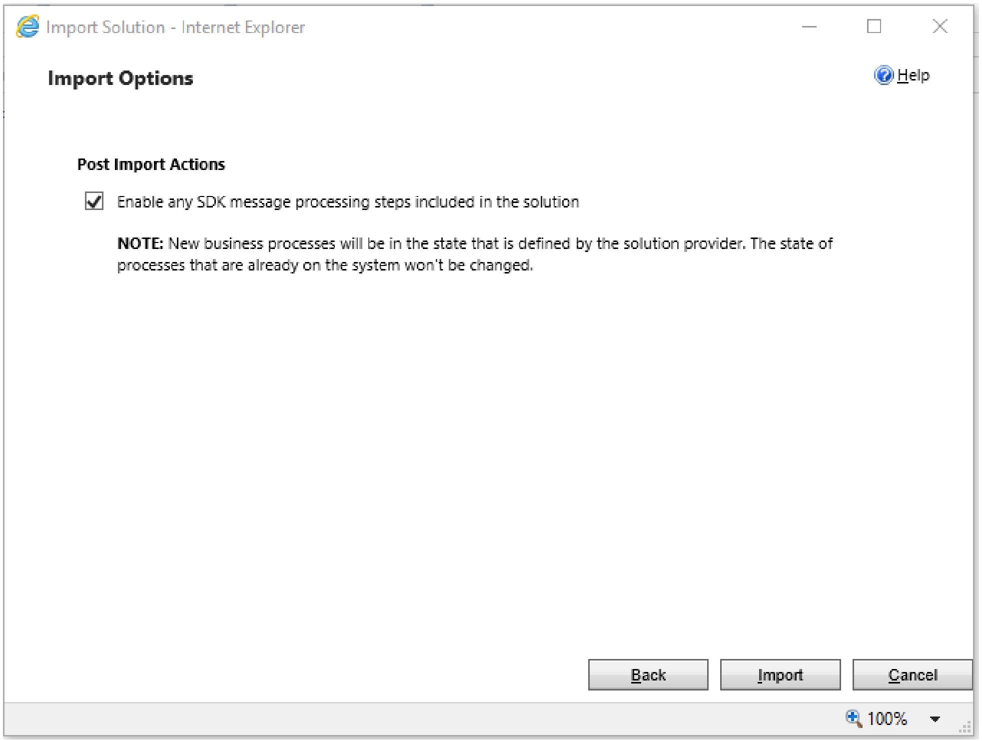




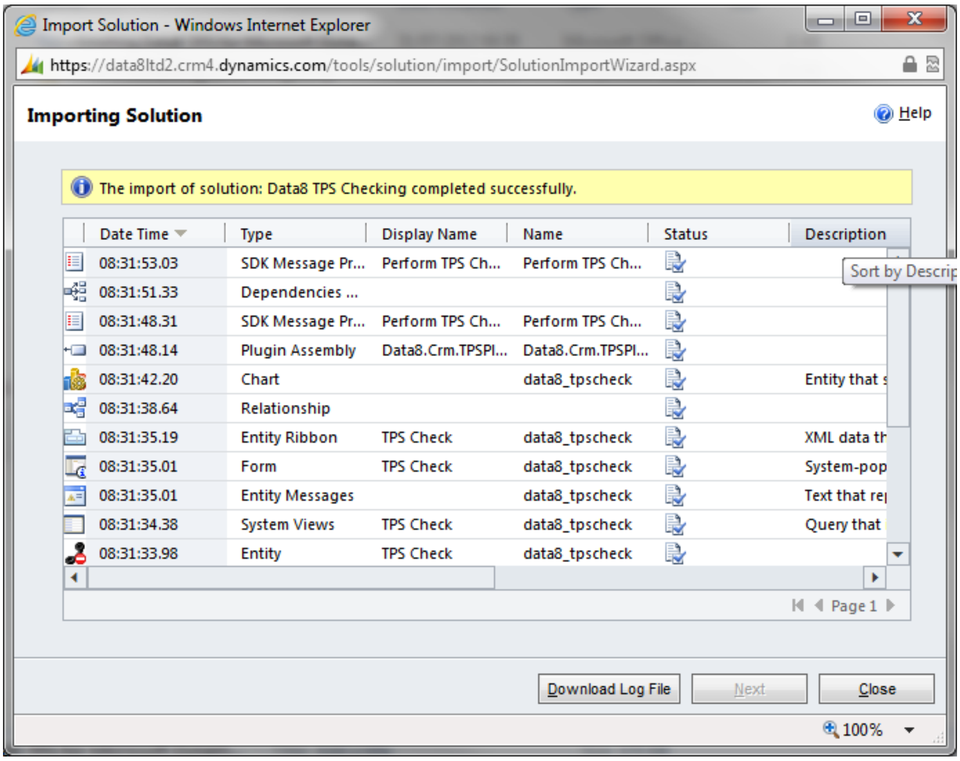
Click “Browse” and select the zip file you have been sent, and then click “Next”.



Click “Next” again to view the import options.



Ensure the “Enable any SDK message…” option is ticked. Click “Next” again and the solution will be imported.



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

Configuring the solution

The latest Data8 Bank Account Validation solution has all resources neatly packaged with the solution – in order to use it to its full capacity, there are a few steps required.

Initial Configuration

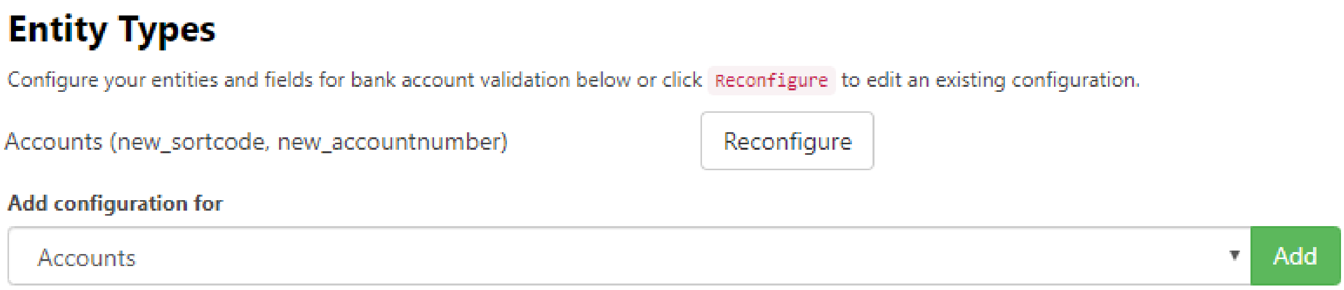
After install, please open the solution and navigate to the configuration page.

Here you will need to enter an API key. 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 – in this case you want a server key as your checking will be performed on the server side.

Paste the API key into the relevant box and click save.

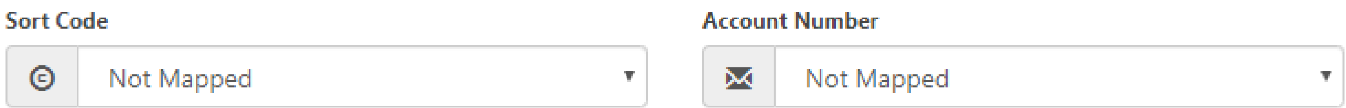
Field Configuration

If you already have some configurations, they will be listed with a "Reconfigure" button. If not, select an entity on in the dropdown box and click "Add". Either pressing "Reconfigure" for existing or "Add" for a new entity will take you to the same page.



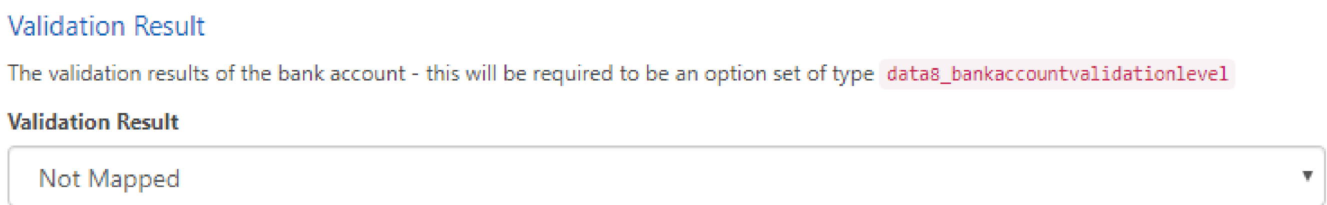
Once your page has reloaded, you will see an option to map many fields.

The most important field mappings that are required are "Sort Code" and "Account Number".

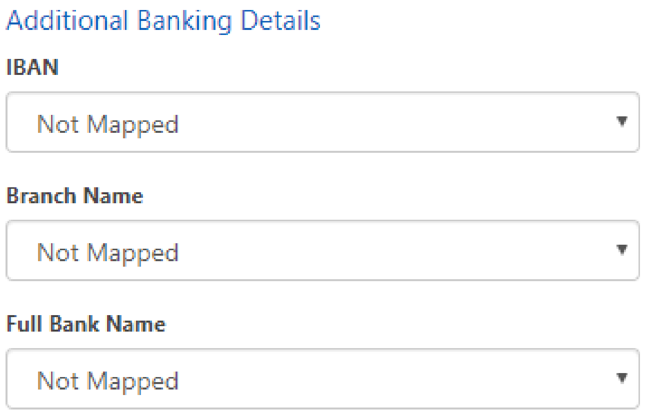


Using the dropdown, select the relevant fields that are to be mapped in to check.

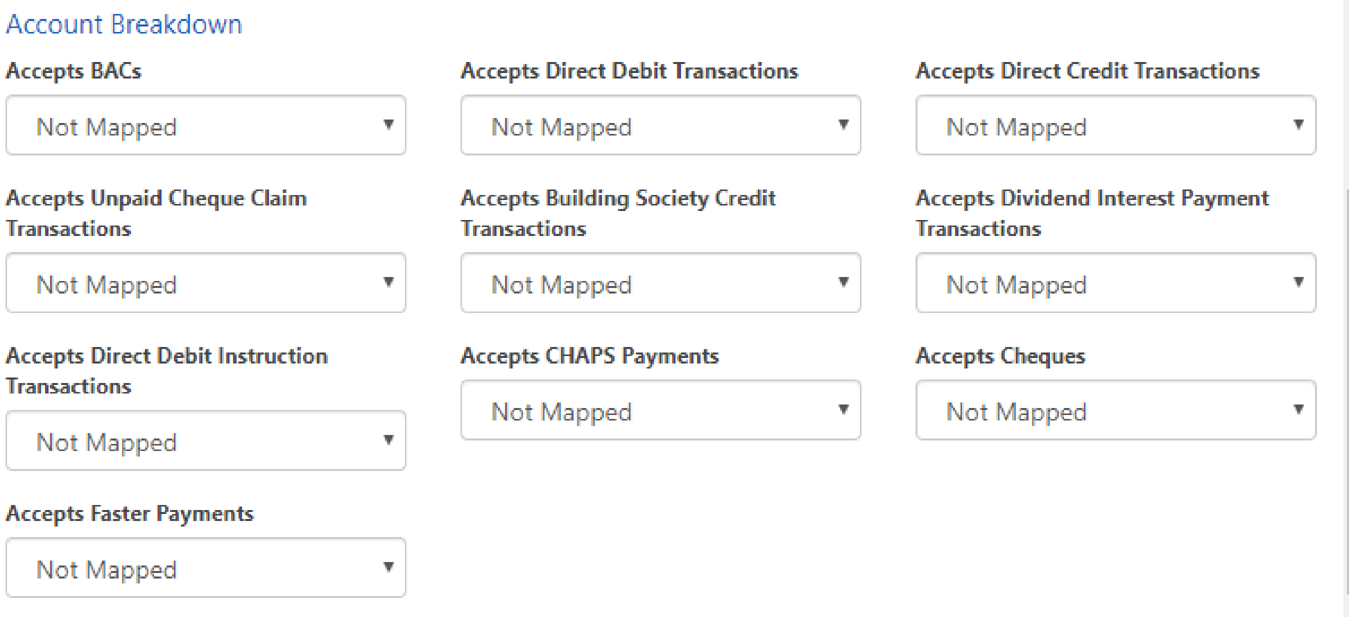
Underneath "Copied Data", you can now select where you want your output fields to be mapped to visit the same entity.



The Validation Result is an option set field which will require a field you have made to be created with an existing option set value called "data8_bankaccountvalidationlevel".



Additional Banking Details are the text values that you can store on save. Only text fields will be listed here.



Account breakdown are the Boolean yes or no fields that determine if an account can perform certain actions. Only Boolean fields will be listed here.

Once you have completed your mapping, simply click “Save” underneath the sort code/account number mapping.

Triggering Validation

When you initial set up your mappings, the system will automatically configure itself to save the validation result on save or update of any related fields.

If you want to have instant feedback, you can follow these additional steps:

Add the “data8_bankaccountvalidation.js” to your form with an event handler called “data8_bankvalidation_start” on the OnLoad event (ensuring you check the box saying “Pass execution context as first parameter”).