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# Installing Data8 Bank Account Validation for Microsoft Dynamics CRM 365



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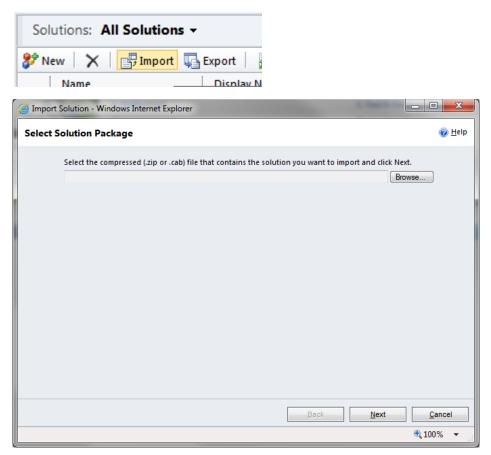




### Installing the solution

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".



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lmport Solution - Intern	et Explorer		_		×
Solution Information	on			@ <u>H</u> e	elp
Solution Informatio	n				
Name:	Data8 TPS Checking				
Publisher:	Data8(data8)				
Package Type:	Managed				
View solution packa	ge details				
		Back	Next	<u>C</u> ar	ncel
				🔍 100%	·

#### Click "Next" again to view the import options.

Solution - Internet Explorer	-		×
Import Options			)
Post Import Actions			
<ul> <li>Enable any SDK message processing steps included in the solution</li> </ul>			
<b>NOTE:</b> New business processes will be in the state that is defined by the solution provider. The state processes that are already on the system won't be changed.	of		
Back Import		<u>C</u> ance	el
	Ð	100%	•

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



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orting Sol	ution					Q
🕕 The imp	ort of solution: Da	ta8 TPS Chec	king completed suc	cessfully.		
Date Tim	ie 🔻 🛛 Type		Display Name	Name	Status	Description
08:31:53	.03 SDK M	essage Pr	Perform TPS Ch	Perform TPS Ch		Sort b
e 08:31:51	.33 Depen	dencies				
08:31:48	.31 SDK M	essage Pr	Perform TPS Ch	Perform TPS Ch		
08:31:48	.14 Plugin	Assembly	Data8.Crm.TPSPI	Data8.Crm.TPSPI		
08:31:42	.20 Chart			data8_tpscheck		Entity that s
08:31:38	.64 Relatio	onship				
08:31:35	.19 Entity	Ribbon	TPS Check	data8_tpscheck		XML data th
08:31:35	.01 Form		TPS Check	data8_tpscheck		System-pop
08:31:35	.01 Entity	Messages		data8_tpscheck		Text that rep
08:31:34	.38 System	n Views	TPS Check	data8_tpscheck		Query that
8:31:33	.98 Entity		TPS Check	data8_tpscheck		[
						•
4						

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 <u>Data8 dashboard</u>. 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.

### **Entity Types**

Configure your entities and fields for bank account validation below or click Reconfigure to edit an existing configuration.

Accounts (new\_sortcode, new\_accountnumber)

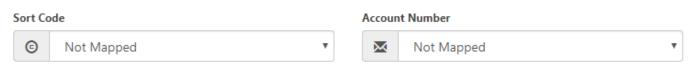
#### Add configuration for

Accounts Add

Reconfigure

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".



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#### Additional Banking Details

IBAN		BIC Code	
Not Mapped	•	Not Mapped	٣
Branch Name		Short Bank Name	
Not Mapped	Ŧ	Not Mapped	٣
Full Bank Name			
Not Mapped	¥		

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

Account Breakdown				
Accepts BACs	Accepts Direct Debit Transactions		Accepts Direct Credit Transactions	
Not Mapped	Not Mapped	•	Not Mapped	۳
Accepts Unpaid Cheque Claim Transactions	Accepts Building Society Credit Transactions		Accepts Dividend Interest Payment Transactions	
Not Mapped	<ul> <li>Not Mapped</li> </ul>	•	Not Mapped	۳
Accepts Direct Debit Instruction Transactions	Accepts CHAPS Payments		Accepts Cheques	
Not Mapped	v Not Mapped	•	Not Mapped	۳
Accepts Faster Payments				
Not Mapped	•			

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").

Add	🖹 Remove 🛛 🔒 U	n-Event Dependencies	Description	
Name data8 bankaci	countvalidation.js	Display Name	Description	
Manage functio	ons that are called for f	orm or field events.		-
Event	OnLoad	•		
Event	OnLoad	▼ Ip   II Down   🚱 Edit   📴	3 Edit Library	
		▼ Ip   ↓ Down   😪 Edit   🖻 Function	3 Edit Library Enabled	
🕂 Add		1 1 1		

