

# Installing Data8 Validation for Microsoft Dynamics 365/CRM



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The Data8 Validation solution adds Data8’s Email Validation, International Telephone Validation and Bank Account Validation services into the forms of Microsoft Dynamics 365 for Sales/Service, ensuring that contact details are validated on entry to improve your data quality and user experience.

## Data8 Account

In order for the solution to function you must have a Data8 account with access to the Email Validation, International Telephone Validation and/or Bank Account Validation services. If you do not already have an account, you can [register for a free trial online](#).

## Ajax API Key

After installing the solution, you will need to enter an Ajax API Key into the configuration page of the solution. This allows the solution to access your Data8 account to make requests to the validation services.

To obtain your Ajax API Key, [log in to the Ajax API Key section](#) of the Data8 website. On this page you will need to re-enter your password and click Confirm to obtain your key.

# Ajax API Key

Please re-enter your password to retrieve your Integr8 Ajax API key:

Also on this page you can manage the Authorised Domains. This is a list of domain names that the Ajax API Key will work from. Ensure the domain name of your Microsoft Dynamics 365 installation is in the list and add it if it is missing. If you have installed the solution through Microsoft AppSource the domain name \*.dynamics.com will already be authorized.

Now you have your Ajax API Key you need to enter it into the configuration for the solution. In Microsoft Dynamics 365, navigate to Settings > Solutions and open the Data8 Validation solution.

Before you can use this solution, you must get an [Ajax API Key](#) for your Data8 account. If you don't have a Data8 account you can [register for a free trial online](#).

Ajax API Key

Paste the Ajax API Key from the Data8 website into this box and click Save. You will then be shown the screen below:



## General Settings

### Ajax API Key

### Default Telephone Validation Country Code

Enter the international dialling code to assume when a number doesn't have one explicitly, e.g. enter "1" to assume numbers are in North America, 44 for UK, 33 for France etc. Any number entered with an explicit country code e.g. "+44 151 355 4555" will be validated according to that country code, any others will use the country code entered here.

### Email Validation Level

 Use Extended Mobile Validation

 Use Extended Landline Validation

 Suggest Email Address Corrections

Note: To get Validation to run on a form you will also need to add an event handler to the form.

If you do not have access to the International Telephone Validation service, the configuration options relating to validating telephone numbers will be hidden. Likewise, if you do not have access to the Email Validation service the email configuration options will be hidden.

## Configuring Telephone Validation

Telephone numbers are validated according to different rules for different countries. If a telephone number contains a full international code, the country will be determined from the number itself. If no international dialling code is specified, the country entered in the Default Telephone Validation Country Code setting is assumed. This defaults to 1 (i.e. North America). If you are outside North America you will want to change this to the international dialling code for your country (e.g. 44 for UK, 33 for France etc.) so that telephone numbers are validated according to the rules for the correct country.

You will also see the Use Extended Mobile Validation and Use Extended Landline Validation checkboxes. These indicate if telephone numbers identified as mobile or landline numbers are validated in more depth using real-time telephone network enquiries. These will be automatically ticked or unticked depending on whether you have access to the Data8 Mobile Validation and Telephone Line Validation services.

## Configuring Email Validation

Email addresses are validated to the level specified on this page:

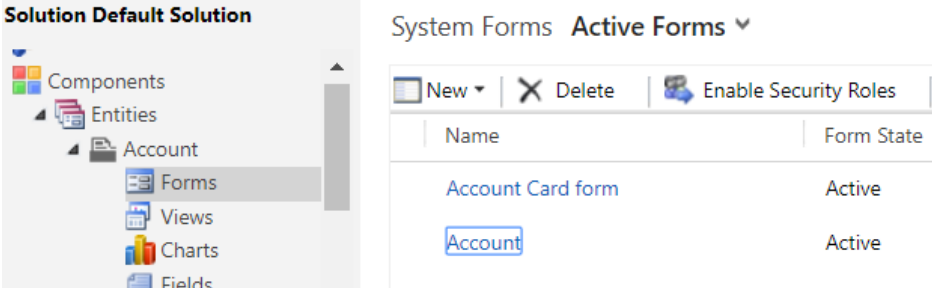
- **Syntax** ensures only that the email address is in the correct format. This is the fastest level of validation but will allow through the most invalid email addresses
- **Domain** ensures that the domain name (to the right of the @ sign) is valid and is configured to accept email. This is normally the best level in terms of speed and accuracy
- **Server** ensures that there is an email server currently live and ready to accept email for the domain. This will eliminate dormant domains but increases the time required to perform the validation
- **Address** ensures the mail server accepts email for the exact mailbox. This is the most precise level of validation but does have a false positive rate, especially for consumer email addresses.

With the Suggest Email Address Corrections box checked, miss-spelt email addresses can be corrected automatically.

# Adding Validation to a Form

Now the Data8 Validation solution is configured, you need to add it to a form. If you installed the solution through Microsoft AppSource, this step will already be done for all forms for the Account, Contact, Lead and User entities.

In Microsoft Dynamics 365, navigate to Settings > Customizations and click Customize the System. In the left hand menu, expand the Entities item, then expand the entity you want to add Data8 Validation to. Click the Forms item within the entity, then open the form to customize.



In the form editor, click the Form Properties button in the ribbon.

On the Events tab of the Form Properties dialog, add the data8\_validation\_base.js script to the Form Libraries section. Then add an Event Handler for the Form OnLoad event using the data8\_validation\_base.js library and enter the function name as data8\_validation\_start. Click OK, and then Publish.

# Form Properties



Modify this form's properties.

Events | **Display** | Parameters | Non-Event Dependencies

Event List

**Form Libraries**

Manage libraries that will be available in the form.

+ Add | Remove | Up | Down | Edit

Name	Display Name	Description
data8_validation_base.js	Data8 Validation Script	Core script for imp...

**Event Handlers**

Manage functions that are called for form or field events.

Control: Form  
Event: OnLoad

+ Add | Remove | Up | Down | Edit | Edit Library

Library	Function	Enabled
data8_validation_base.js	data8_validation_start	True

OK Cancel

Repeat this step for as many other forms as you like to add Data8 Validation to all appropriate parts of your Microsoft Dynamics 365 system.

## Adding Validation to an Attribute

With the script added to the form, the appropriate validation functionality will automatically be added to all email address and telephone number fields on the form. If you are not seeing the validation you expect, please check the Format setting on the attribute. This needs to be set to Email or Phone for validation to be applied.



**Type**

Data Type\*

Field Type\*

Format\*

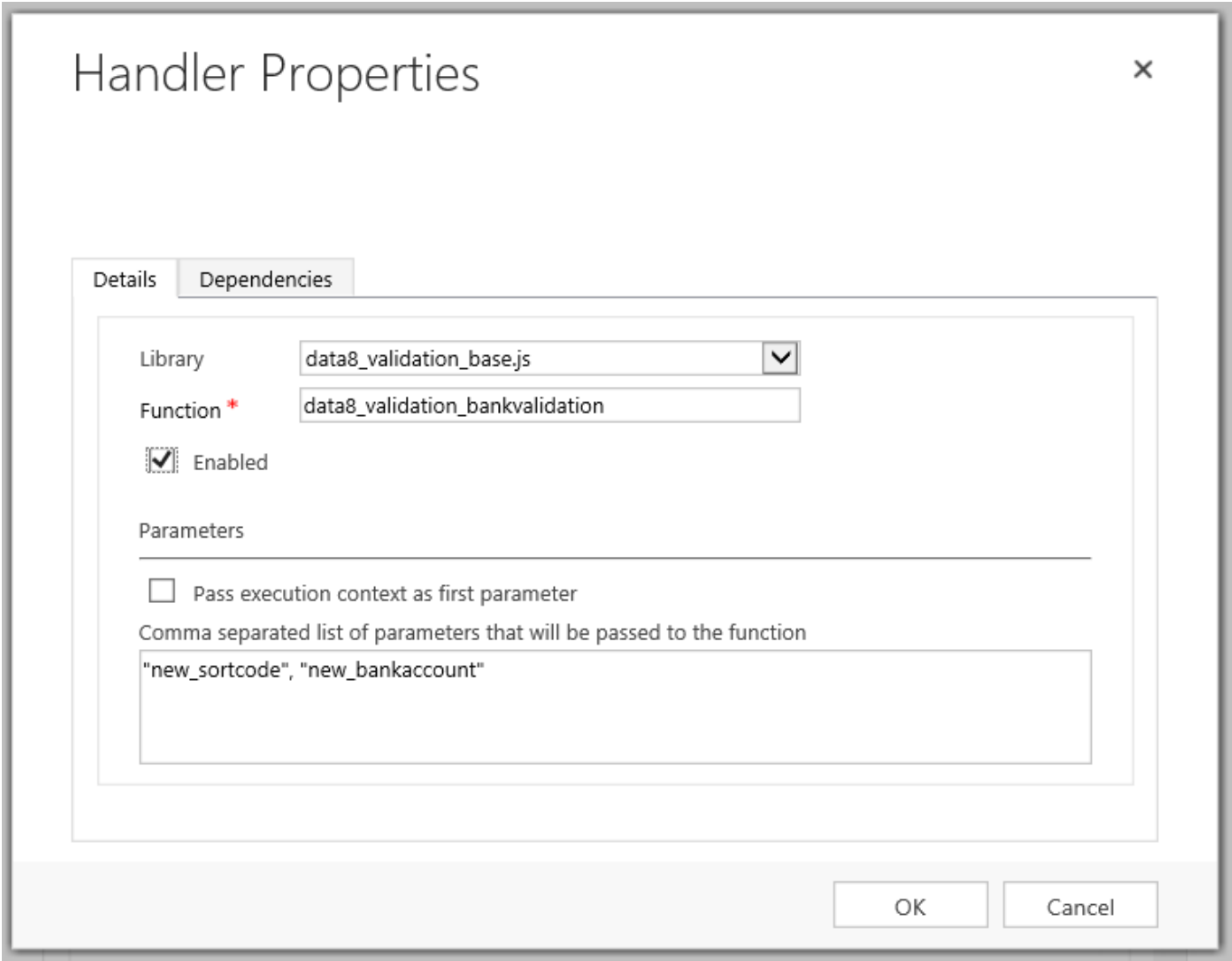
Maximum Length\*

IME Mode\*

- Text
- Email**
- Text Area
- URL
- Ticker Symbol
- Phone

To add bank account validation, return to the Form Properties dialog and add an additional event handler to the form's OnLoad event. Select the same data8\_validation\_base.js library and enter the function name "data8\_validation\_bankvalidation".

In the Parameters section, enter the logical names of the attributes that hold the sort code and bank account details, each surrounded in quotes and separated by a comma.



If you have multiple bank account details on the same form, repeat this process creating one event handler for each sort code / bank account number pair in turn.