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Little Stanney
Chester CH2 4NE

Installing Data8 Business Insights for Microsoft Dynamics 365/CRM

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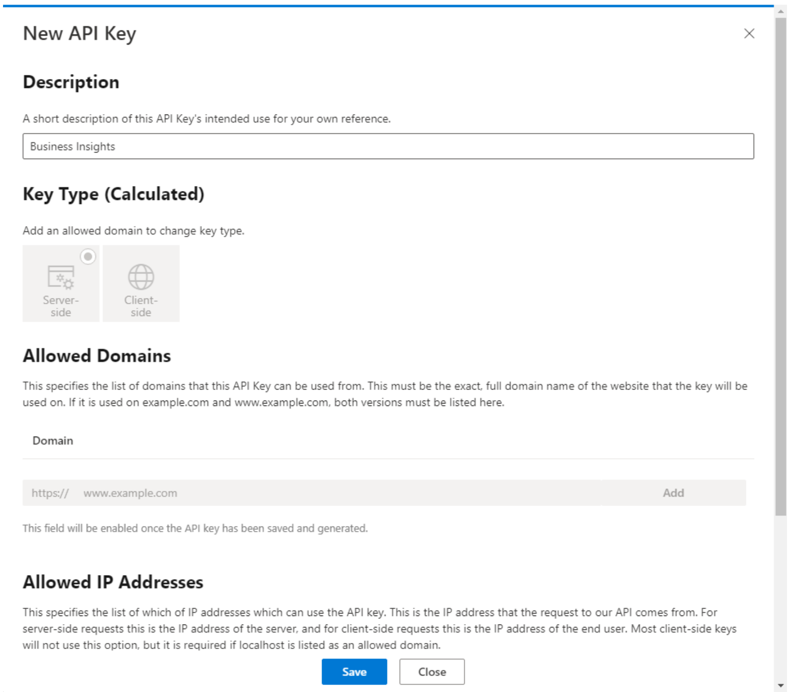
Obtaining an API Key

Go to https://www.data-8.co.uk/dashboard/api-keys/. Click “Add API Key” and select “I will use it on a Website”, enter a useful description for the key, e.g. “Business Insights” and click on Save.



Under “Allowed Domains” enter the domain name of your CRM instance and click Add. If you are using an on-premise CRM instance that you use a different domain name for external IFD connections, repeat this process for both the internal and external DNS names.

Click Close and your new API Key will be shown in the list.

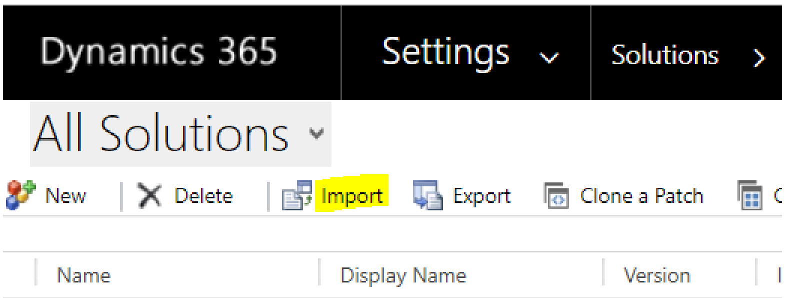
Installing the solution

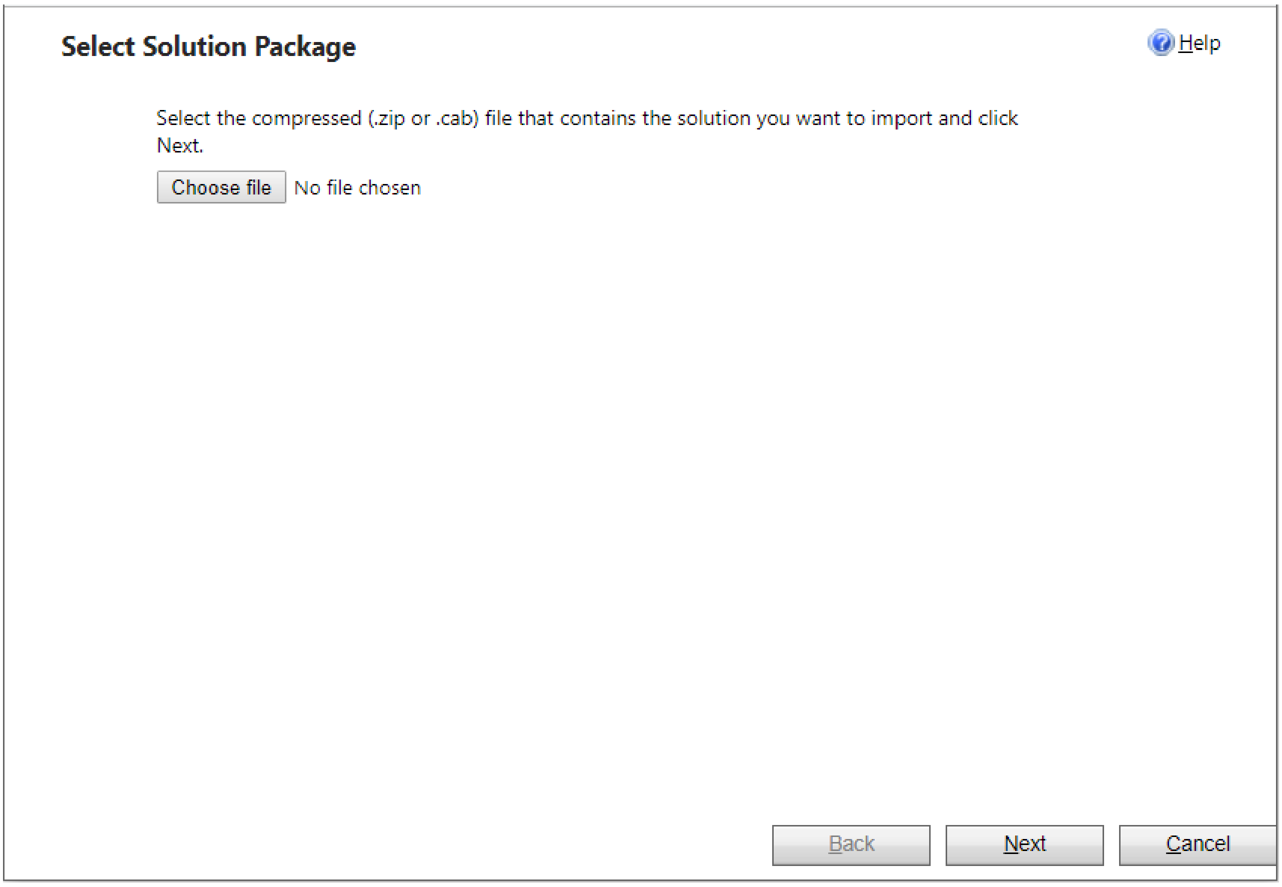
Online

The latest version of the Business Insights solution can be installed into Online environments from AppSource. From the Data8 Business Insights AppSource page, click “Get it now” and AppSource will guide you through the process of installing the solution.

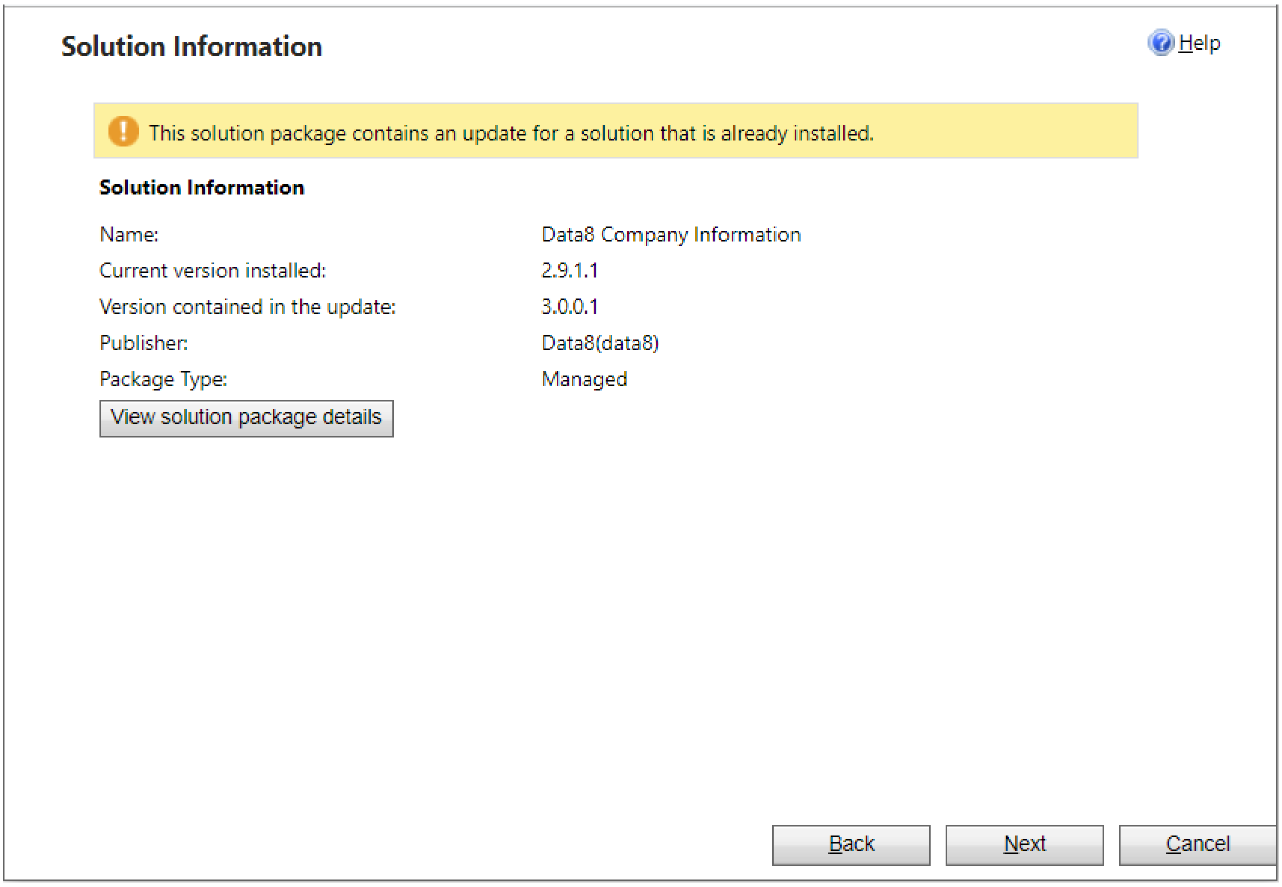
On-Premise

You will have been provided with a zip file containing the Business Insights solution. To install it, open Microsoft Dynamics 365/CRM and go to Settings > Solutions. Click “Import” to start the installation.



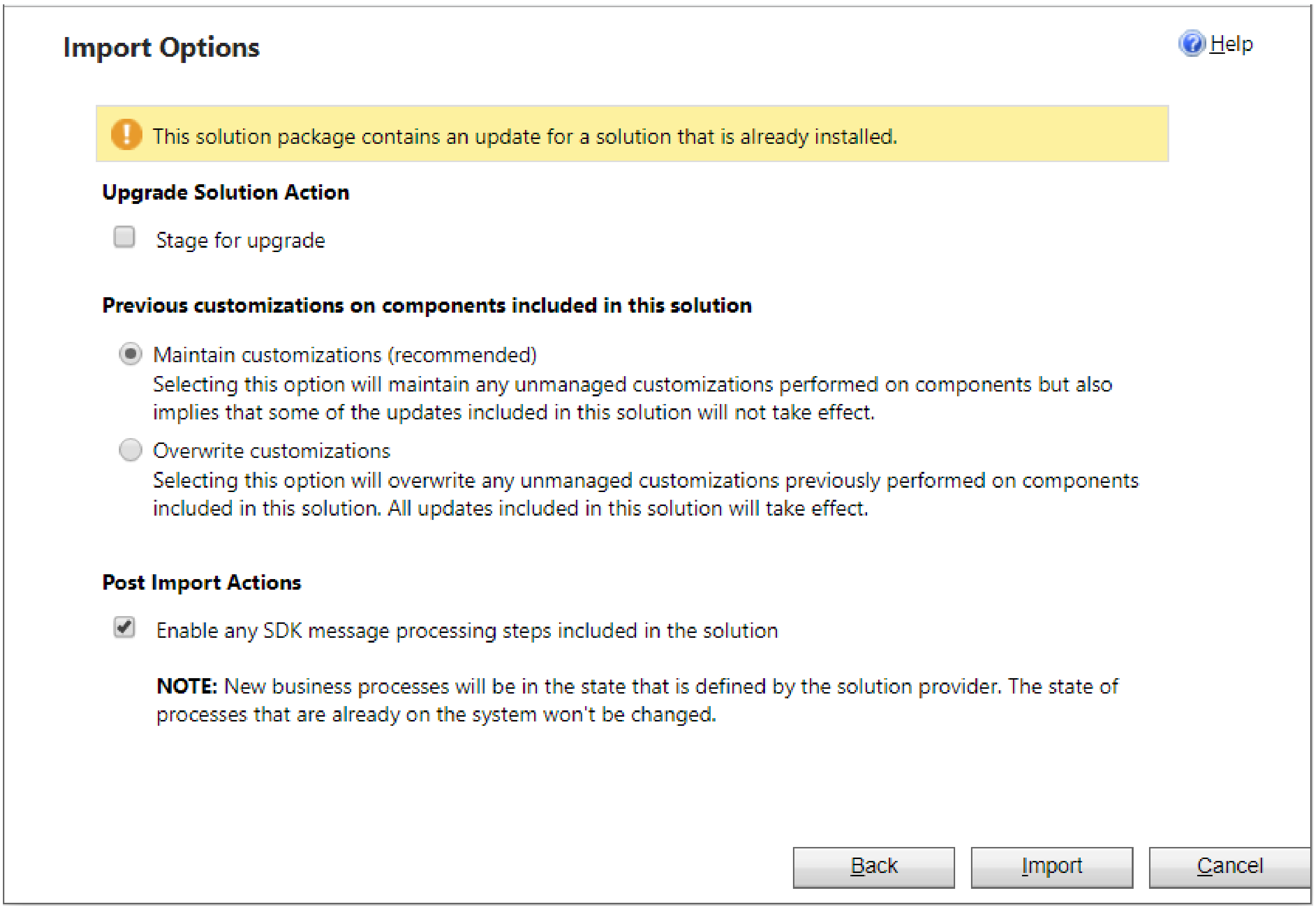


Click “Choose file” and select the zip file you have been sent, and then click “Next”.



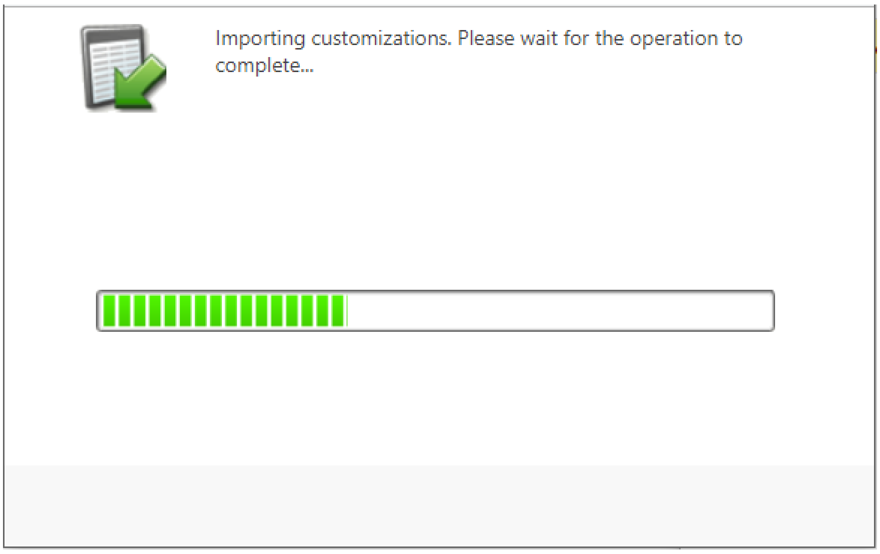
If this is the first time you have installed the solution you will see the basic details of the solution listed here. If you already have a previous version installed you will see the additional details as shown above.

Click “Next” again to view the import options.



If this is the first time you have installed the solution you will see only the "Post Import Actions" section of this screen. If you already have a previous version installed you will see the additional details as shown above. Unless you have made unmanaged changes to the solution you have previously installed it should not matter which option you pick out of "Maintain customizations" and "Overwrite customizations"

Ensure the "Enable any SDK message processing steps included in the solution" option is ticked. Click "Import" and the solution import process will begin.



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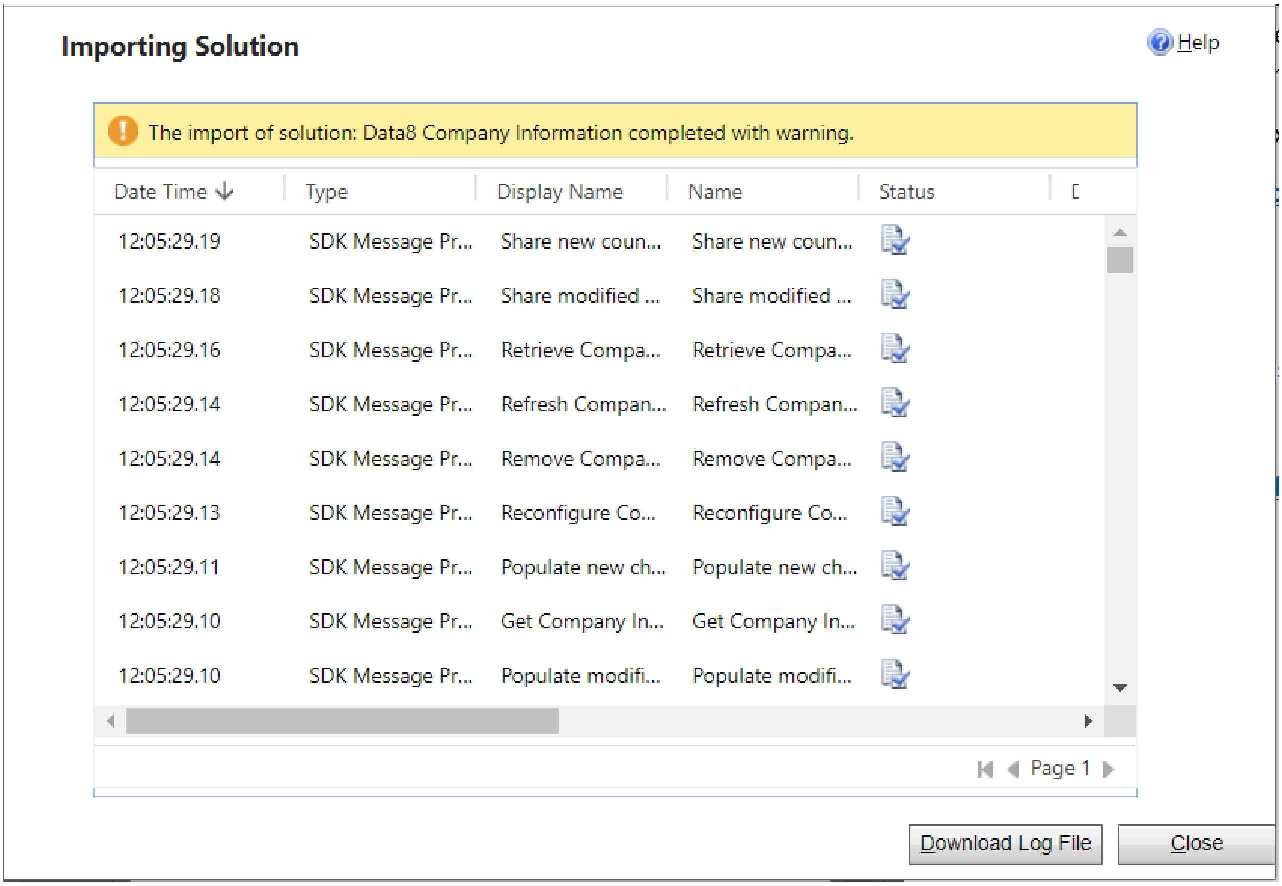

Once the process completes you will see the status of the import for each component in the solution. Note that it is normal for this to show some warnings when installing an updated version.

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

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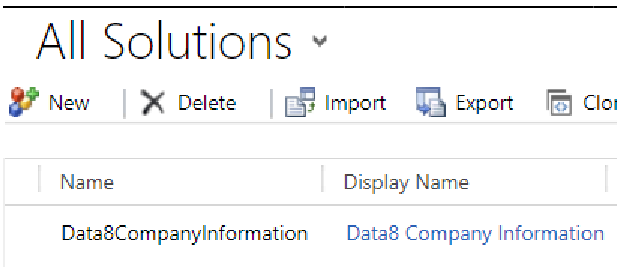
Configuring the Business Insights system

Online

Open the app switcher (in the top toolbar, next to Power Apps or Dynamics 365, click the name of your current app) and select the Data8 Business Insights Configuration app to open the configuration screen.

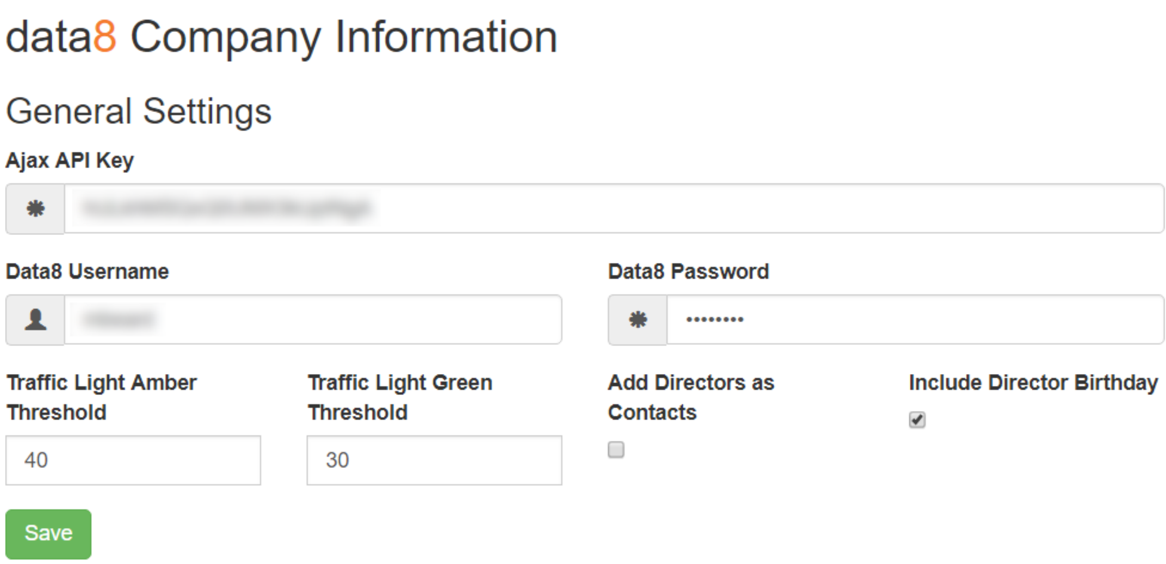
On-Premise

From the list of solutions, open the Data8BusinessInformation entry to bring up the configuration screen.



Configuration Screen

After the “Loading” message has finished, you will be shown a screen to enter your license details.



Enter your API key you took from the Data8 website earlier and your Data8 username and password.

You can also change some additional options at this point:

- **Traffic Light Amber Threshold**. A red light will be shown in the traffic light display for any companies with a credit rating below this value.
- **Traffic Light Green Threshold**. An amber light will be shown in the traffic light display for any companies with a credit rating below this value, and a green light for credit ratings of this value or above.
- **Add Directors as Contacts**. When retrieving company information for accounts, any directors of that company can automatically be added as contacts. This option does not have any effect when retrieving company information for other record types such as leads.
- **Include Director Birthday**. When adding directors as contacts, this option controls whether or not the director’s birthday is included in the contact record.

Click “Save” to store these details.

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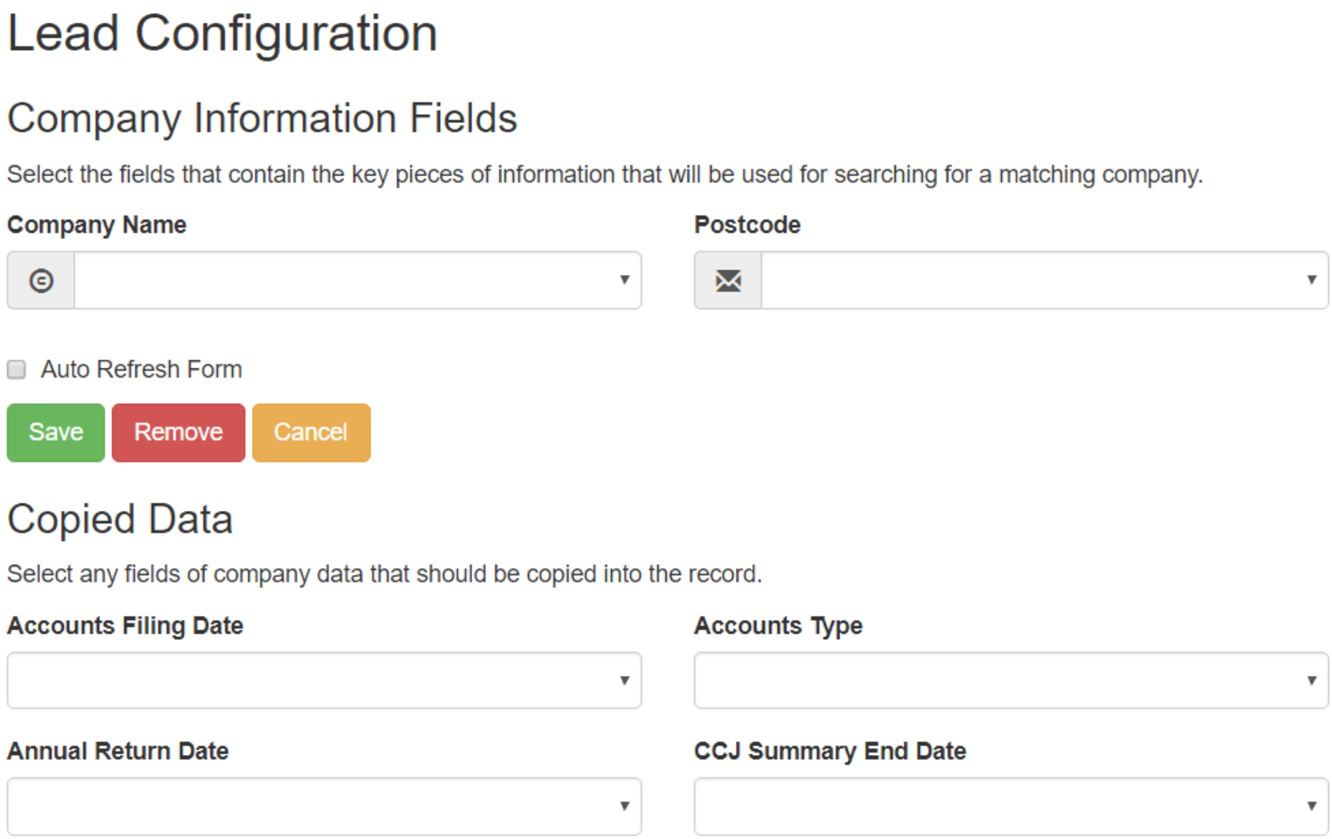
Adding Business Insights to a form

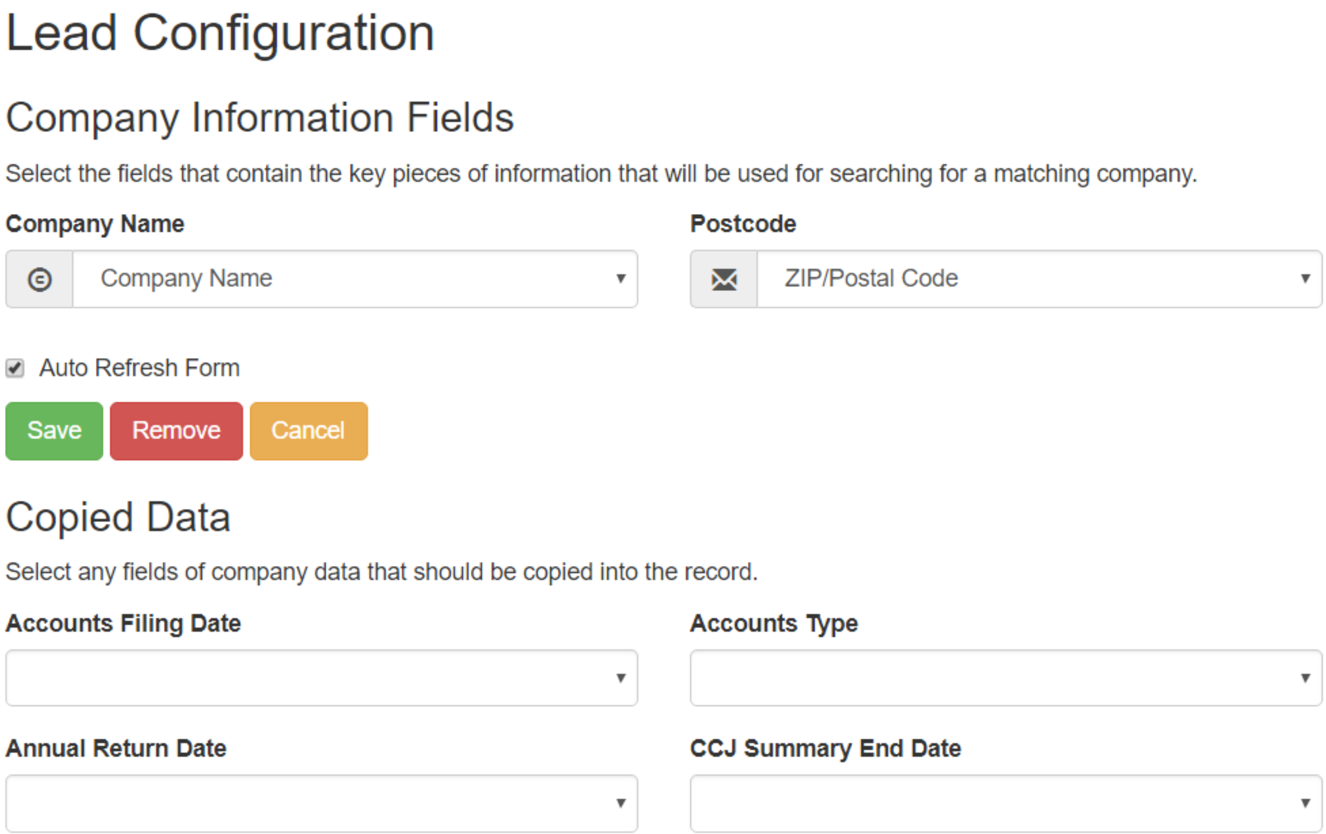
To add the Business Insights functionality to a form, select the type of entity (e.g. Leads) that you want to add it to, then click Add.



You can now set up what fields from the record are used to identify a matching company. Matching is done based on the company name and/or postcode, so select which fields in your record contain this information. The fields you select for matching your record to a company must be available on the record's form.

In addition, you can also select any of the information about the matched company to be copied back into your record. You can choose from any of the main company information, their most recent financial reports, credit rating, limit and previous name. For each piece of information you want to copy back into your record, select which field in your record you want to copy it back into.

Any existing data in a selected field will be overwritten when information on the related company is initially obtained or refreshed in the future, so please take care not to select any fields that may be manually updated.



When you are happy with the fields you've selected, click "Save".

Repeat this process for any other entities you want to add Business Insights functionality to.

By adding this configuration, the solution will automatically create a data8_companyid field on the entity you have selected. This field is a lookup to the Company entity included in the solution which holds all the details of the company. You can use this relationship in Advanced Finds etc. as for any other field.

Online – add PCF control to your form

In the Power Apps maker portal (make.powerapps.com) navigate to the Data > Tables menu and select the table that you have configured Business Insights for. Go to the Forms tab and select the main form for the table.

Add any standard text column to your form in the location you want to display Business Insights. For example, on the account record you could add the Name column. In the column properties of the right of the form designer, expand the "Components" section and click "+ Component". Select the "Business Insights" component and click Done.

Save and publish the changes to your form, and repeat for any additional form layouts you want Business Insights to be visible on.

On-Premise – add web resource to your form

In order for a user to select a company, we provide a web resource which should be added to your form(s). Add the "data8_companyinformation_form" web resource to your form and configure it as follows:

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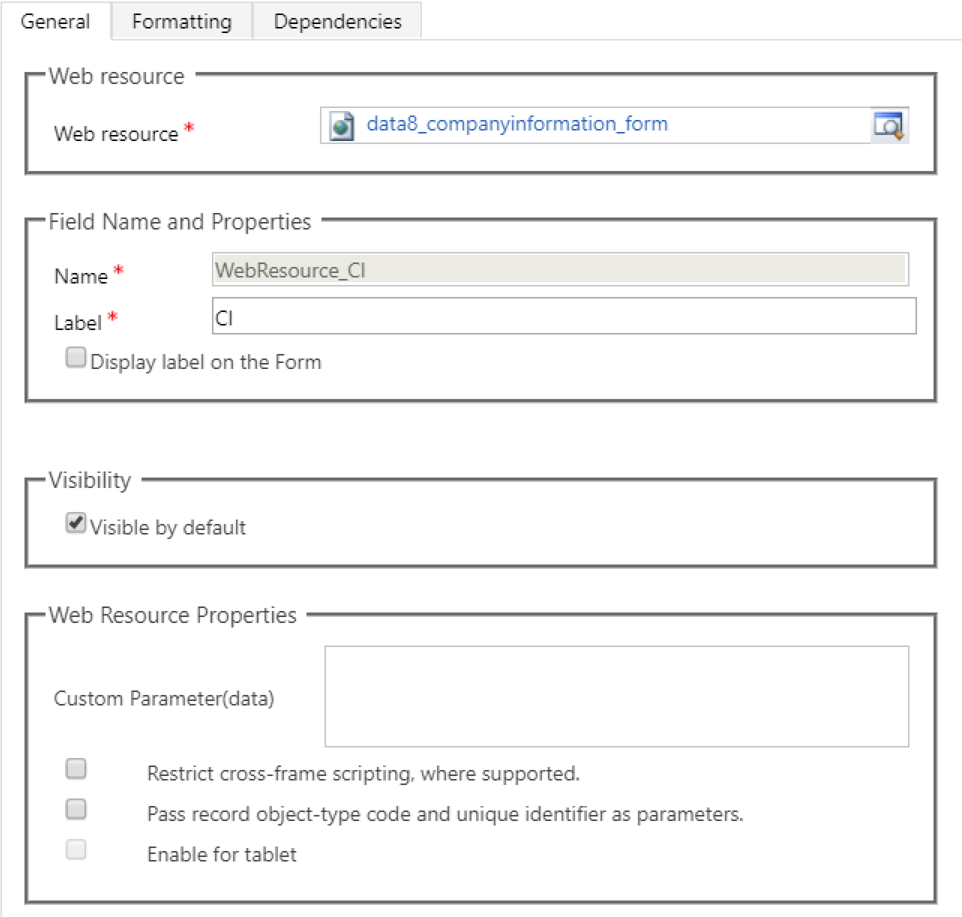
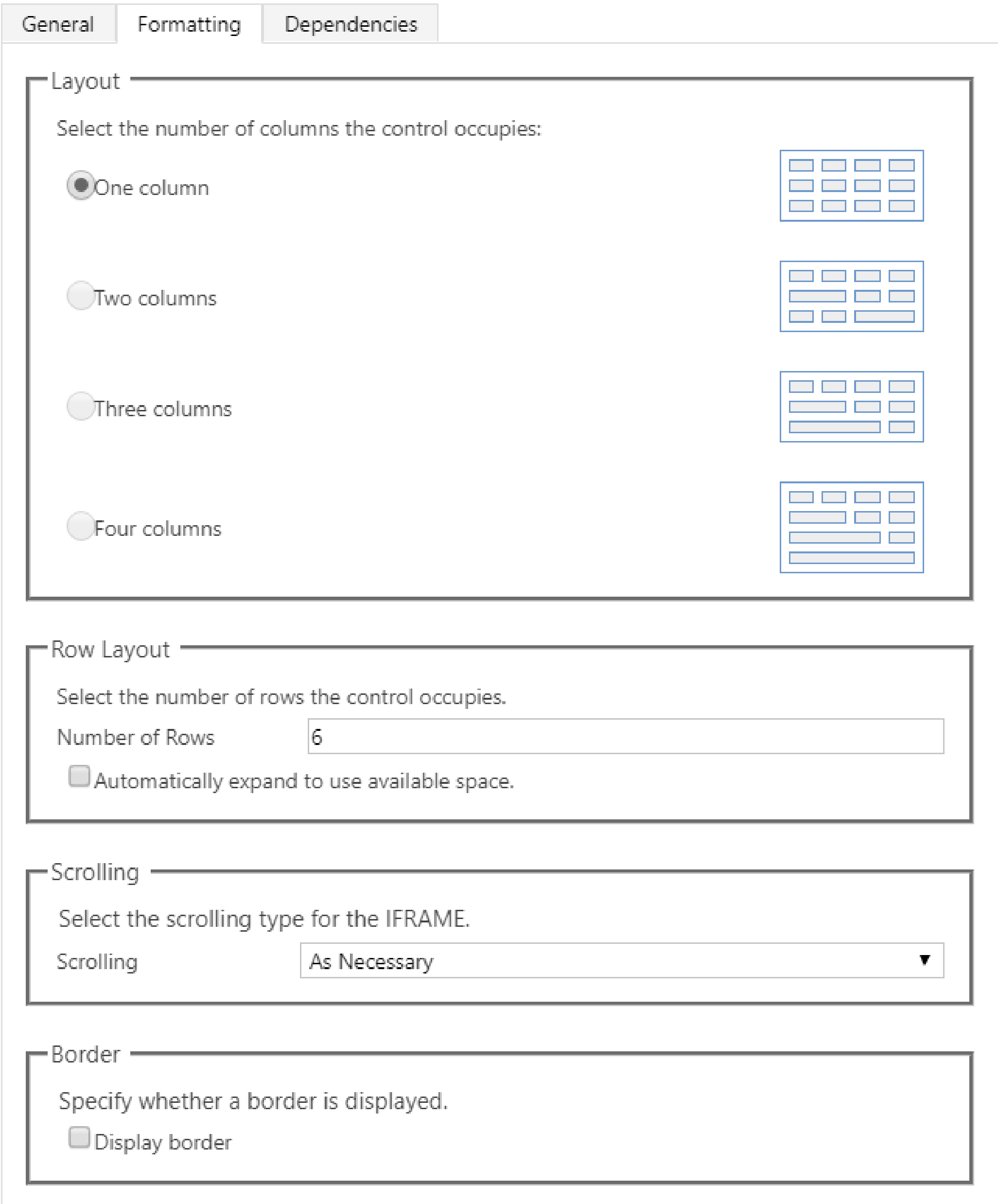

General
Formatting
Dependencies
Web resource
Web resource *
data8_companyinformation_form
Field Name and Properties
Name *
WebResource_CI
Label *
CI
Display label on the Form
Visibility
Visible by default
Web Resource Properties
Custom Parameter(data)
Restrict cross-frame scripting, where supported.
Pass record object-type code and unique identifier as parameters.
Enable for tablet



When you have finished, save and publish the changes to your form.

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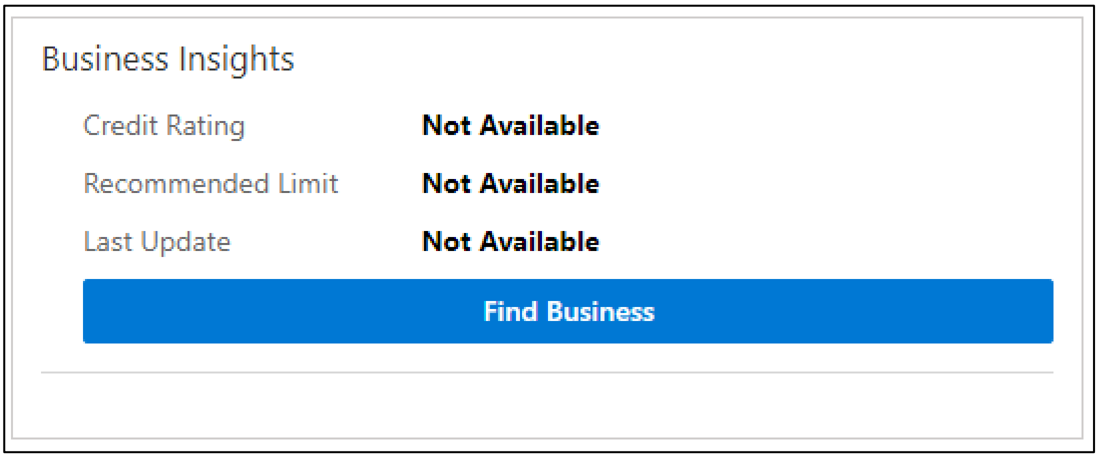
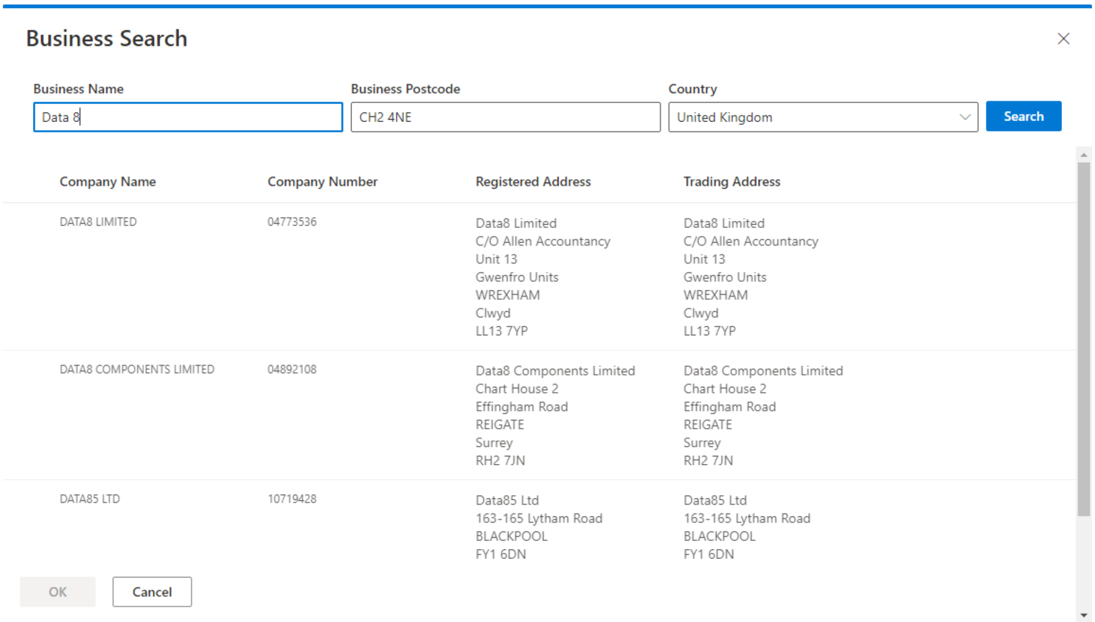
Using Business Insights

Your form will now show the Credit Rating and Recommended Limit fields, and a “Find Business” button will appear.



The “Find Business” button will be not be available until the record is saved.

Once the record has been saved, click the button to bring up a search dialog to select the appropriate company. Any companies matching the name of your record will be displayed.



If necessary, alter the search criteria and click “Search” again until the required company is available in the list. Select the company that matches your record and click OK.

Once all the company information has been retrieved your screen will refresh to show a summary of the company information.

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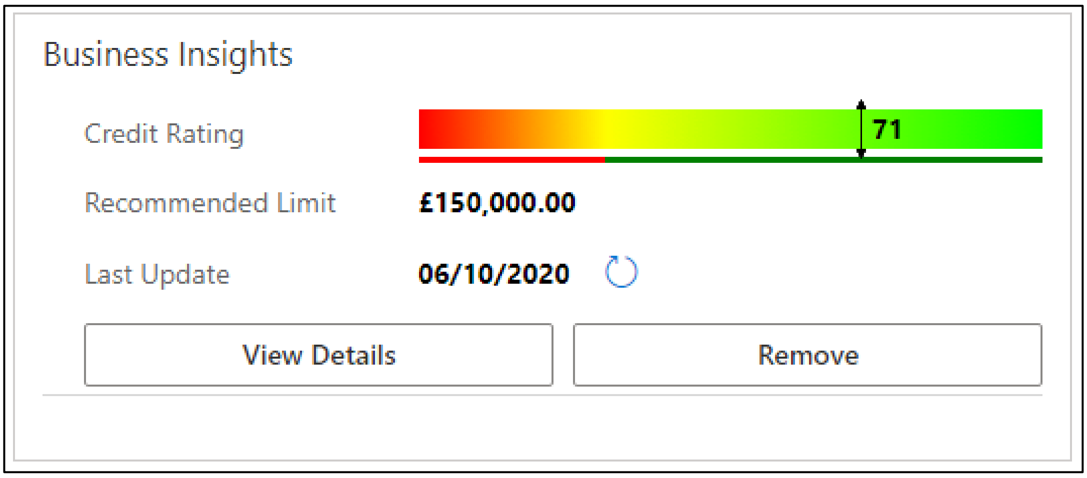

Business Insights
Credit Rating
71
Recommended Limit
£150,000.00
Last Update
06/10/2020
View Details
Remove

Viewing additional company information

In addition to the updated traffic light display and preview of the current credit rating and limit for the selected company, any information that was configured to be copied across to your record will now be shown on the form.

To show additional data on the company as well as the credit rating and limit and any information that has been copied to your record, click the “View Details” button. This will display all the available information on the selected company, which you can navigate in the same way as any other CRM record. In particular, the related records menu contains a number of additional record types that hold further information on the company beyond that displayed on the main form.

COMPANY : INFORMATION

DATA8 LIMITED

General

Name *	DATA8 LIMITED	Country *	UK
Company Number *	04773536	Company Type	Private limited with Share Capital
Company Status	Active - Accounts Filed	SIC Code	62090
Incorporation Date	5/21/2003	SIC Description	Other information technology service activities
Latest Credit Limit	£75,000.00	Latest Credit Rating	62
Latest Previous Name	NETWORK SECURITIES LIMITED		
Refresh Now	No		

Accounts

Accounts Type	--	Annual Return Date	2/20/2018
Accounts Filing Date	12/31/2017	Latest Accounts Date	3/31/2017
CCJ Summary Start Da	--	CCJ Summary End Da	--
Number of CCJs	--	Number of Writs	--
Total CCJ Value	--	Latest Financials	2016-04-01 - 2017-03-31
Outstanding Mortgag	0	Satisfied Mortgages	1
Share Capital	£1,000.00		

Contact

Street 1	Data8 Limited, C/O Allen Accountancy	State/Province	Clwyd
Street 2	Unit 13	Postcode	LL13 7YP
Street 3	Gwenfro Units	Country	United Kingdom
City	WREXHAM	Web Site	https://DATA-8.CO.UK
		Main Phone	--

Scanned copies of the company reports can be obtained from the “Image Reports” menu item. Select a report to view, select “Yes” for the “Download” field and click “Save”. The report will then be downloaded and shown as a note with an attachment – open this attachment to view the report.

Please note that image reports are generally offered on a limited basis and/or at extra cost. If you do not have access to them or you do not have any remaining image report credits then this feature will not be available.

Updating company information

As company information changes frequently over time, you can choose to refresh the details you hold on a company at any time by either:

- Clicking the refresh icon in the traffic light display on your record, or
- Selecting “Yes” for the “Refresh Now” field in the company record and clicking “Save”

Regardless of what method you use to refresh the data, both the company record itself and any other records that are linked to it will be updated with the latest available details.

Controlling access to the Business Insights system

User Roles

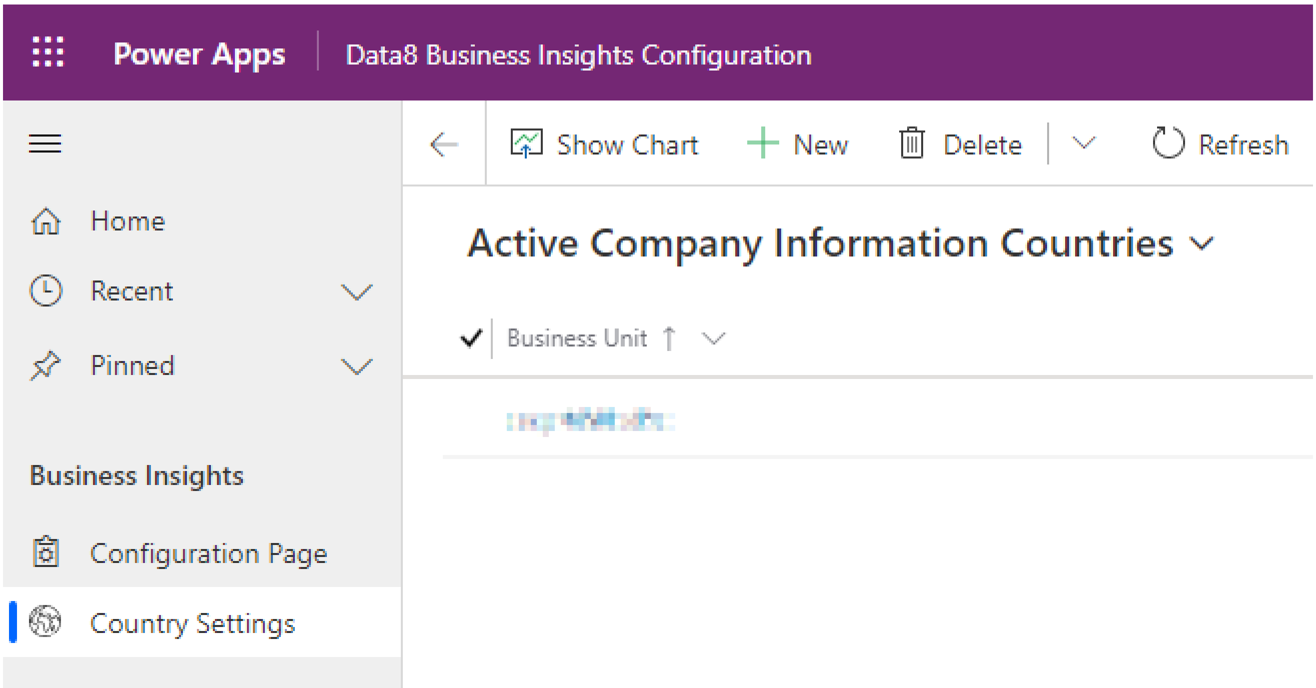
For a user to have access to the Business Insights system, they must be part of the “Company Information User” security role.

If a user is not part of this role, instead of seeing the traffic light display they will see a locked padlock with a message asking them to contact their CRM administrator to get access to this role.

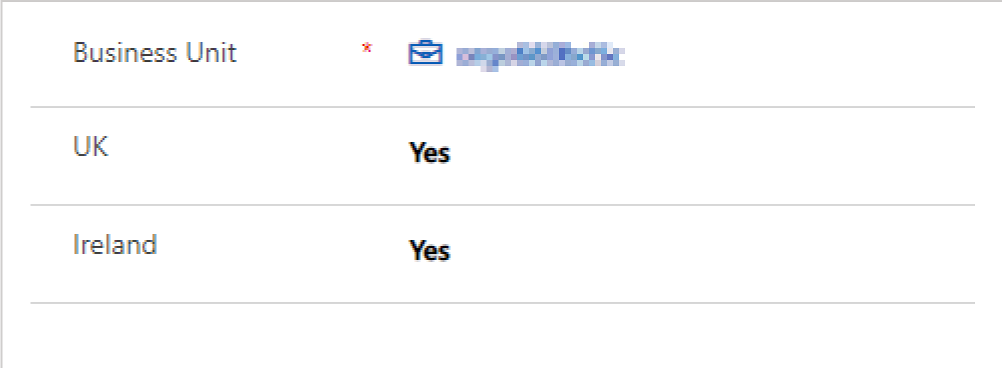
Country Restrictions

The Data8 Business Insights solution currently supports data for the UK and Ireland. However, by default, only UK data is available.

Each business unit can be configured to have access to either UK data, Ireland data, or both. Configuration of this is done via the “Country Settings” item in the Business Insights Configuration app for online editions, or the “Company Information Countries” option under the main CRM Settings menu for on-premise.



In this section you can create a record for each business unit and select which countries users in that business unit should have access to.



If there is no entry for a business unit, the settings for the parent business unit will be used, and so on until some settings are found. If no settings are found for a particular business unit, a default of UK only will be used.

Please note that data for each country is licensed separately, and you must have data for a country available on your Data8 account before it will work in CRM.

Upgrading from previous versions

If you already have a version of the Data8 Business Insights solution prior to version 2.0 installed, please remove all entity types from the configuration and uninstall the solution before installing the new version.