

q.address add-on for Dynamics 365 Marketing & Sales, Field Service etc. Customer Engagement - White Paper - - Version 2.0, 2. February 2024

This document is machine translated. For the original German version see [here](#).

Contents

1 q.address	2
2 q.address add-on for Dynamics 365 CRM	3
3 All-round data quality	6
4 Design	8
5 Installation	9

Contact us

ACS Informatik GmbH
Landsberger Straße 398
81241 Munich

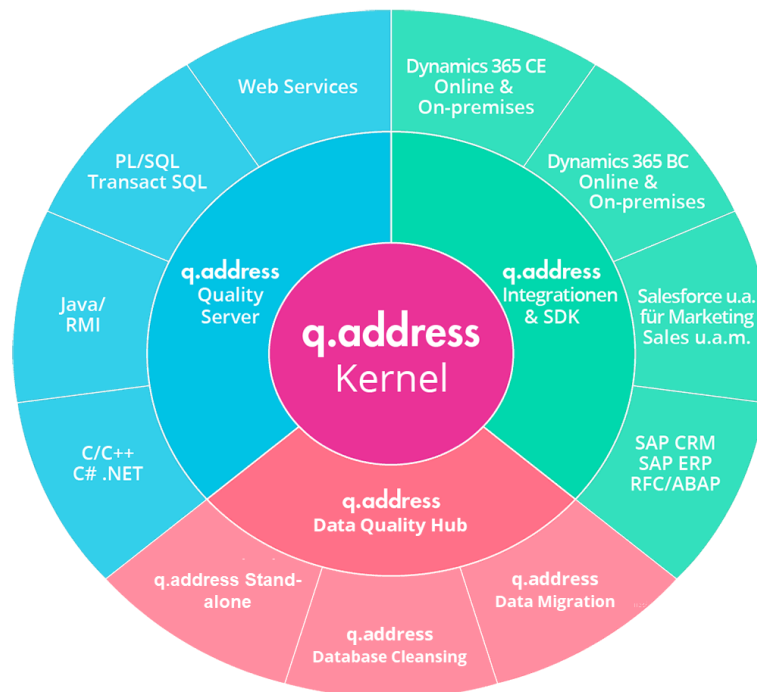
Phone: +49 89 820 755-20

sales@qaddress.de
www.qaddress.de

1 q.address

q.address has supported Dynamics 365 since its first versions in 2004 (back then: Microsoft Business Solutions CRM 1.2 (2004) and later Microsoft Dynamics CRM 3.0 (2005).

Today, the **q.address add-on for Dynamics 365 Marketing & Sales** and **Customer Engagement** has grown into a mature and recognized powerful solution for ensuring data quality in Dynamics 365 CRM. The q.address add-on has also been available on the AppSource Marketplace since 2019!



q.address Product overview

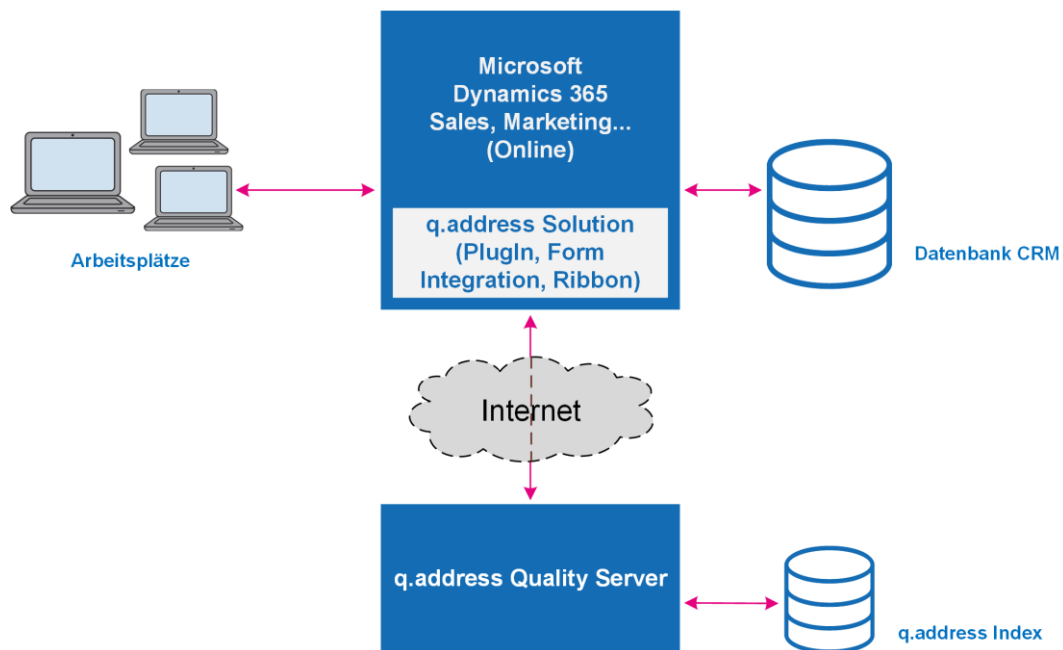
The **q.address Data Quality Hub** rounds off the package and supports you from migration to CRM to regular inventory monitoring ("Housekeeping", section 3).

2 q.address add-on for Dynamics 365 CRM

q.address supports both the online and on-premises versions, so we will also refer to Dynamics 365 CRM in the following:

- ❖ q.address add-on for Dynamics 365 Marketing, Sales, Field Service etc.
- ❖ q.address add-on for Dynamics 365 Customer Engagement (CE)

The AppSource version presented here can of course only be installed in the online versions of Dynamics 365 Marketing, Sales, Field Service etc. - but with just one click of the mouse!



q.address modules

The main modules and components of the q.address add-on for Dynamics 365 CRM are

❖ q.address search

Addresses are often difficult to find. You can spend a lot of time if you do not know the correct name or only know it incompletely, if names and addresses are spelled differently than expected or rearranged, or even if acronyms and abbreviations are used. q.address searches error-tolerantly and takes into account not only phonetic variants, but also all typical typing errors, abbreviations, acronyms, changed name arrangements and much more.

q.address Duplicate check (DC)

When you create a new object such as a company, contact or lead or update relevant data such as a name, address or communication data in an existing company, contact or lead, the duplicate check checks whether the object already exists in this or a similar form in your CRM.

If this is the case, a dialog opens with the duplicate candidates found and you decide whether there really is a duplicate. q.address will help you to merge the duplicate objects.

q.address AddressCheck

When you enter a new address or update an address, AddressCheck checks whether the address and spelling are correct and whether the zip code matches the city and street. Simple errors are automatically corrected in the background. In the case of more serious errors where q.address should not make an automatic decision, a dialog opens in which the user can make the choice. q.address supports around 250 countries worldwide.

q.address supports input with AutoComplete, AutoCorrect and AutoFill.

q.address NameCheck (NC)

q.address NameCheck formats names, recognizes first and last names and the gender from the first names. Salutations are created correctly, taking into account all titles and name forms. q.address NameCheck is based on a comprehensive thesaurus with over 1 million names.

Further checks and formatting

- Formatting date fields and telephone numbers (international)
- Checking domains and e-mail addresses

Background checks

All checks are carried out in the background, so that you will generally not notice anything from q.address! Only if something is wrong - if a duplicate is found or an address needs to be adjusted - will you receive a message (in the case of addresses, only if it is not just a trivial correction).

Learn more

Videos:

- q.address Migration Server
- [q.address explained in a nutshell](#)

Continued on next page!

🔗 Article:

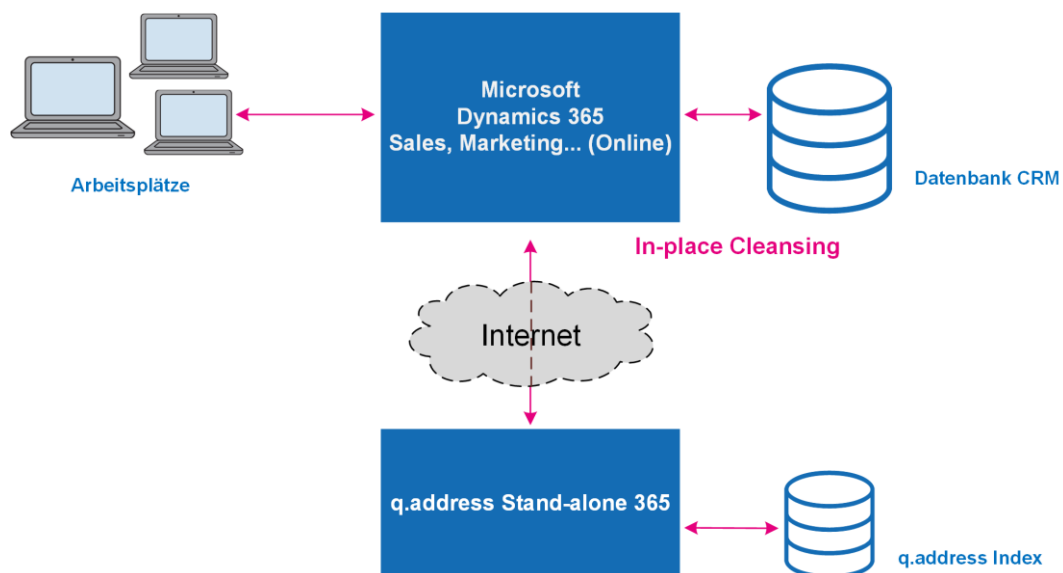
- [q.address now also in Microsoft AppSource](#)
- [Data quality in Microsoft Dynamics 365](#)
- [Data quality with q.address](#)

3 All-round data quality

Monitoring address maintenance is only one part of quality assurance. Data quality begins with the migration to a new CRM or with a basic cleansing, and ends with the regular review of the inventory ("housekeeping"). Occasionally, however, business areas also need to be merged or address lists transferred from address brokers. Data from the online store, for example, also needs to be checked and merged with existing customers.

q.address also offers solutions for this:

q.address Stand-alone 365



In addition to the q.address add-on, q.address Stand-alone 365 is a powerful solution for checking and cleaning up the entire inventory.

q.address Stand-alone 365 allows you to completely check and clean up your CRM. The cleansing is carried out directly in the CRM, you do not need to export any data or transfer any results. This also includes merging data and merging contacts, sales opportunities, invoices, custom entities, etc. ("in-place cleansing"). ("in-place cleansing").

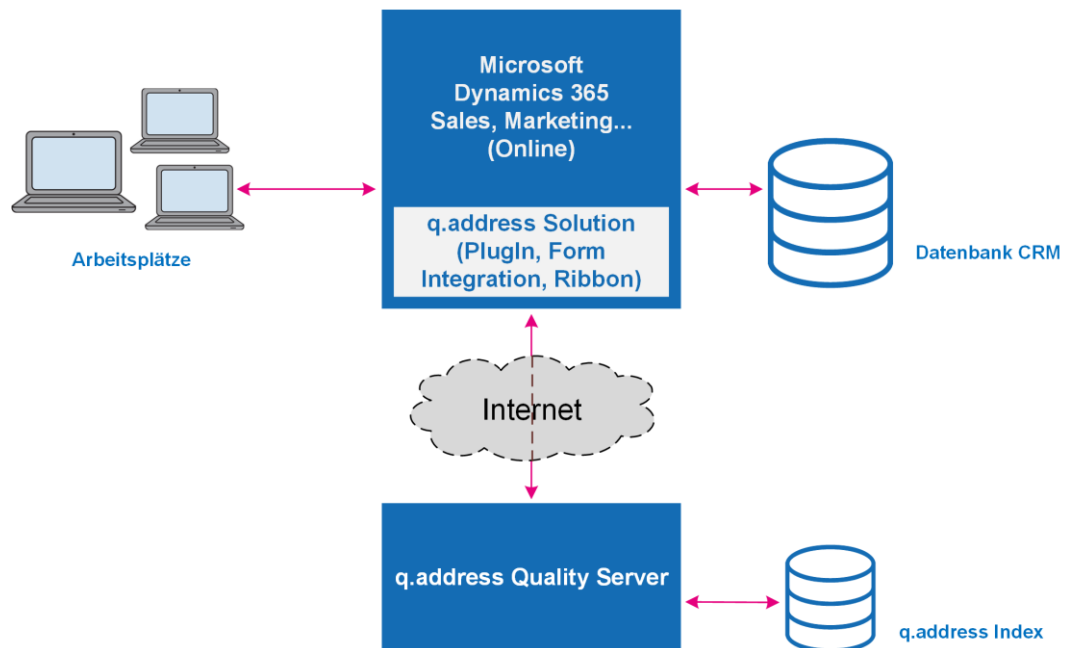
q.address Stand-alone 365 is therefore suitable for the

- ✚ Data preparation for migration to the new CRM or a new CRM version
- ✚ Consolidation of business divisions
- ✚ Basic cleaning and later the periodic inventory review ("housekeeping")
- ✚ Data transfer from Internet stores or address lists.

Learn more

- ✚ Blog:
 - [Data quality in Microsoft Dynamics 365](#)
- ✚ Product description:
 - [q.address Stand-alone 365](#)
- ✚ Videos:
 - [q.address Migration Server](#)
 - [q.address for Dynamics 365 CRM \(Webinar\)](#)

4 Design



The q.address add-on consists of a solution that is installed in Dynamics 365 CRM and the q.address Quality Server, which provides the functionality and manages the q.address index. The q.address Index contains the index required for address and duplicate searches.

5 Installation & data protection

Installation from AppSource (test installation)

The AppSource installation requires the online version of Dynamics 365 Marketing & Sales. The q.address Solution is imported as a Managed Solution. The AppSource installation uses the q.address Quality Server provided in the cloud via the q.address Cloud Service.


Installation via Microsoft AppSource is the quickest and most convenient way to test the q.address add-on.

Productive installation

The installation for productive use installs the q.address add-on either for Dynamics 365 CRM Online (Marketing, Sales etc.) or On-premises (Customer Engagement). During productive installation, the q.address Quality Server is installed and managed by the user. As the q.address Quality Server, and in particular the q.address Index, means that all data remains in the care of the user, there are no data protection issues!

In detail

 **Installation & data protection**



ACS Informatik GmbH
Landsberger Straße 398
81241 Munich
Germany (Germany)

Phone: +49 89 820 755-0

sales@qaddress.de www.qaddress.de