

Installing Data8 Bank Account Validation for Microsoft Dataverse/Dynamics CRM 365



Table of Contents

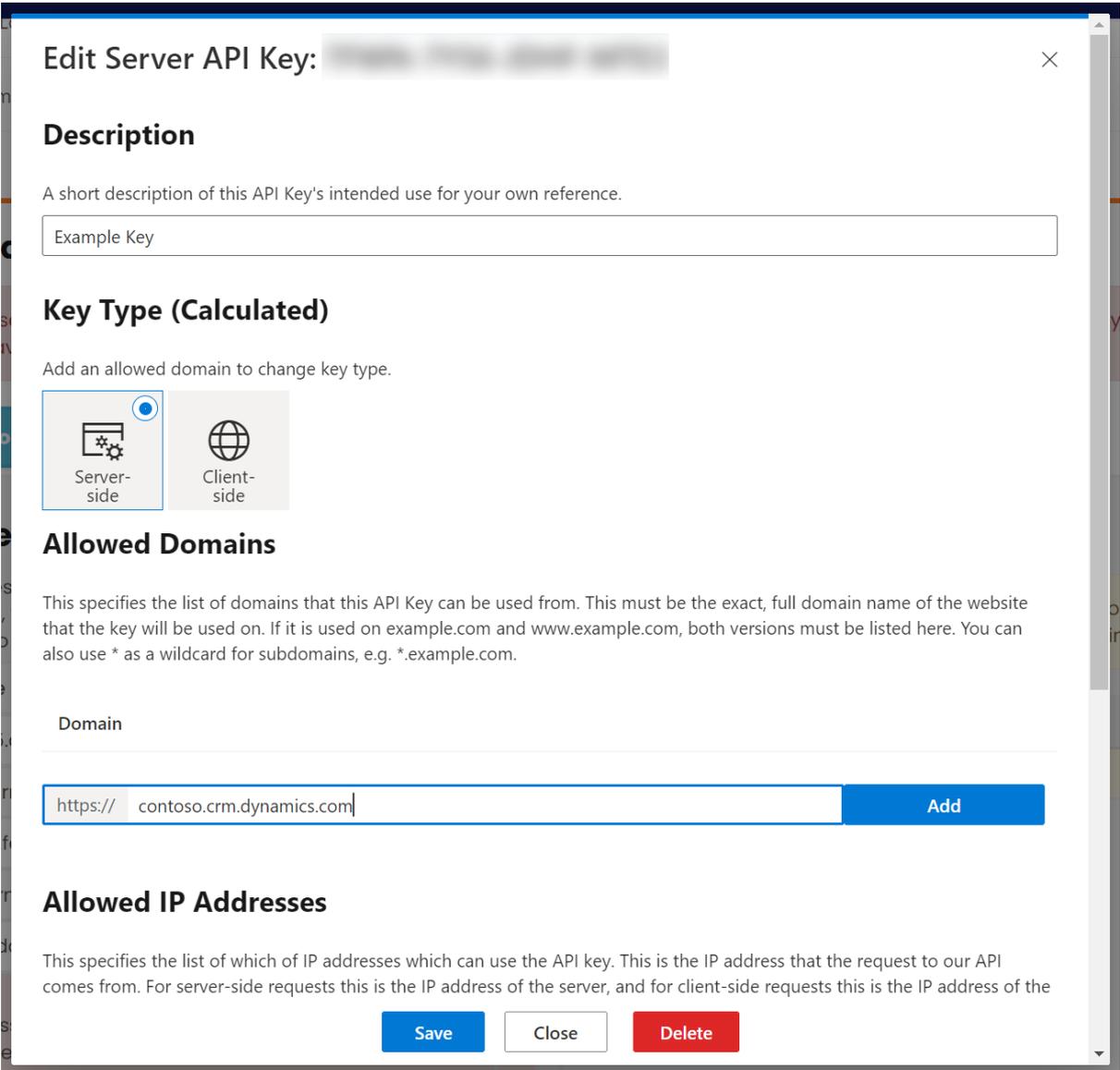
- Installing Data8 Bank Account Validation for Microsoft Dynamics CRM 365 1
 - Installing the solution 3
 - Configuring the solution 5
 - Initial Configuration 5
 - Field Configuration 5
 - Triggering Validation 7



Obtaining an API Key

To obtain an API key, please follow these steps:

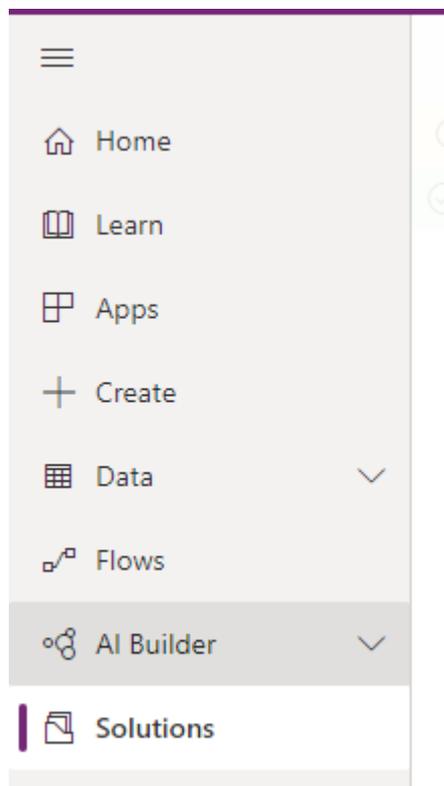
1. Go to <https://www.data-8.co.uk/dashboard/api-keys/>.
2. Click "Add API Key"
3. Give the API key a name and save it.
4. Create a second API key, give it a name and save it.
5. Once saved open one of your keys, the "Allowed Domains" section will be editable. Enter the domain you wish to authorise and click "Add". For example, if you go to <http://contoso.crm.dynamics.com/> to access your CRM system, enter "contoso.crm.dynamics.com". If more than one domain name can be used to access your CRM system, e.g. internal users use <http://crmserver/> while home workers use <http://crmserver.example.com/>, add all applicable domain names in turn.
6. Copy both API keys for use later on- the one you entered an "Allowed Domain" into is your client key and the other is your server key.



Installing the solution

Note: If you installed the solution from AppSource then this step will have been completed for you.

You will have been provided with a zip file containing the bank account validation solution. To install it, open <https://make.powerapps.com>, ensure you're in the right environment in the top right of the page and navigate to "Solutions" on the bottom of the left nav bar.



Click "Import" and select the zip file you have been sent, and then click "Next".

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.

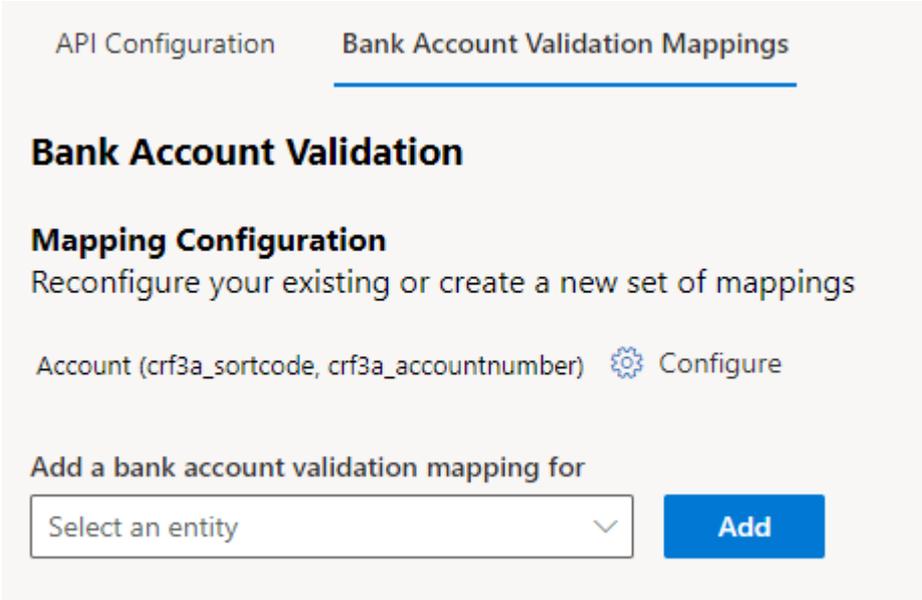
Initial Configuration

Once installed, navigate to your list of “Apps” and open the app called “Data8 Bank Account Validation Configuration”.

Here you will need to enter the API keys you made. Paste each API key into the relevant box and click save.

Field Configuration

If you already have some configurations, they will be listed with a “Configure” button. If not, select an entity on in the dropdown box and click “Add”. Either pressing “Configure” 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.

Existing Mappings

Sort Code	Account Number
<input type="text" value="Not Mapped"/>	<input type="text" value="Not Mapped"/>
IBAN	BIC Code
<input type="text" value="Not Mapped"/>	<input type="text" value="Not Mapped"/>

Underneath “Optional Data Mapping”, you can now select where you want your output fields to be mapped to.

Validation Result

Not Mapped

The Validation Result is an option set field which will require a new field to be created with an existing option set value called “Bank Account Validation Level” (data8_bankaccountvalidationlevel).

Sync with global choice? *

- Yes (recommended)
Can be used in multiple tables, and will stay updated everywhere.
- No
Creates a local choice that can only be used in one table. People using it can add new choices.

Sync this choice with *

Bank Account Validation Level

Edit choice New choice

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

Branch Name	Short Bank Name	Full Bank Name
Not Mapped	Not Mapped	Not Mapped
Accepts BACs	Accepts Direct Debit Transactions	Accepts Direct Credit Transactions
Not Mapped	Not Mapped	Not Mapped
Accepts Unpaid Cheque Claim Transactions	Accepts Building Society Credit Transactions	Accepts Dividend Interest Payment Transactions
Not Mapped	Not Mapped	Not Mapped
Accepts Direct Debit Instruction Transactions	Accepts CHAPS Payments	Accepts Cheques
Not Mapped	Not Mapped	Not Mapped
Accepts Faster Payments		
Not Mapped		

Account breakdown are 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” at the bottom of the page.

Triggering Validation

When you initially 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”).

