

# Installing Data8 Business Insights



# Contents

- Obtaining your API Keys ..... 3
- Client Side API Key ..... 3
- Server API Key ..... 3
- Installing the solution ..... 4
- Authorising Business Insights ..... 8
- Data Configuration for Business Insights ..... 9
- Adding Business Insights to your Form ..... 10
- Using Business Insights ..... 11
- Viewing additional company information ..... 13
- Updating company information ..... 14
- Controlling access to the company information system ..... 14
  - User Roles ..... 14
  - Country Restrictions ..... 14



## Obtaining your API Keys

The Data8 Business Insights solution requires 2 keys – a client side ajax API key and a server API key. You can obtain both of these by going to <https://www.data-8.co.uk/ValidationAdmin/AjaxAPIKey> and clicking “Add API Key”.

### Client Side API Key

For the client side key you need to select “I will use it on a Website”.

Enter a useful description for the key, e.g. “Company Information Client Side”.

Click the “+” button next to “Allowed Domains” and enter the domain name of your CRM instance. 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 Save and your new API Key will be shown in the list.

### Server API Key

For the server side key you need to select “I will only use it from Server”.

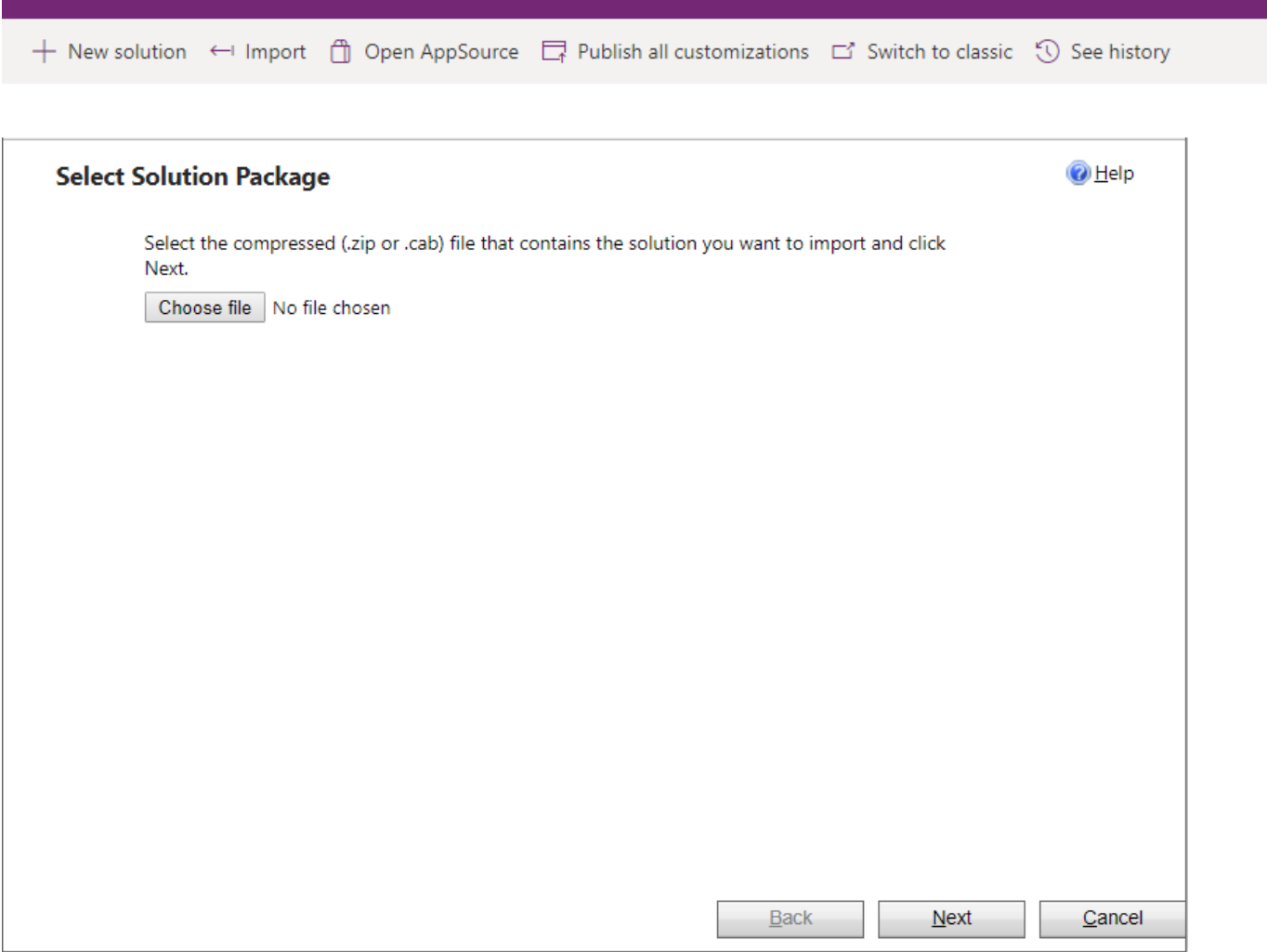
Enter a useful description for the key, e.g. “Company Information Server Side”.

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

# Installing the solution

AppSource should always be the preferred method of installation, <https://appsource.microsoft.com/>, however you can choose to install the solution manually should you wish and you will have been provided with a zip file containing the company information solution.

To install it, navigate to <https://make.powerapps.com/> and use the environment selector on the top right to ensure you're in the correct environment. Once you are in the correct environment, select "Solutions" from the bottom of the left-hand column. This will change your page and you should have an "Import" button at the top to start the installation.



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

**Solution Information**  Help

This solution package contains an update for a solution that is already installed.

**Solution Information**

Name:	Data8 Company Information
Current version installed:	2.9.1.1
Version contained in the update:	3.0.0.1
Publisher:	Data8(data8)
Package Type:	Managed

[View solution package details](#)

Back Next Cancel

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.

### Import Options Help

This solution package contains an update for a solution that is already installed.

**Upgrade Solution Action**

Stage for upgrade

**Previous customizations on components included in this solution**

- Maintain customizations (recommended)  
Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.
- Overwrite customizations  
Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

**Post Import Actions**

Enable any SDK message processing steps included in the solution

**NOTE:** New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

Back Import Cancel

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.

Importing customizations. Please wait for the operation to complete...

### Importing Solution Help

**!** The import of solution: Data8 Company Information completed with warning.

Date Time ↓	Type	Display Name	Name	Status	
12:05:29.19	SDK Message Pr...	Share new coun...	Share new coun...		
12:05:29.18	SDK Message Pr...	Share modified ...	Share modified ...		
12:05:29.16	SDK Message Pr...	Retrieve Compa...	Retrieve Compa...		
12:05:29.14	SDK Message Pr...	Refresh Compan...	Refresh Compan...		
12:05:29.14	SDK Message Pr...	Remove Compa...	Remove Compa...		
12:05:29.13	SDK Message Pr...	Reconfigure Co...	Reconfigure Co...		
12:05:29.11	SDK Message Pr...	Populate new ch...	Populate new ch...		
12:05:29.10	SDK Message Pr...	Get Company In...	Get Company In...		
12:05:29.10	SDK Message Pr...	Populate modifi...	Populate modifi...		

Page 1

[Download Log File](#) [Close](#)

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.

## Authorising Business Insights

The Data8 Business Insights solution includes a custom model driven app that can speed up the set up. The app is called “Data8 Business Insights Configuration” and by opening this, you have a place to store all required credentials quickly.

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

### Data8 Business Insights

#### General Settings

Client Side Ajax API Key

Server Side API Key

[Advanced Settings »](#)

Save

#### Entity Types

Accounts

Reconfigure

Add Business Insights configuration for

 Add

Enter your API keys you took from the Data8 website earlier.

You can also change some additional options at this point:

- **Non-Limited Data.** If your license entitles you to, you are able to turn on non limited data in your responses. This is not enabled by default.
- **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.



## Data Configuration for Business Insights

Add Company Information configuration for

Leads ▼ Add

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

### Account Configuration

#### Business Insights Fields

Select the fields that contain the key pieces of information that will be used for searching for a matching company.

Company Name

⊖ Account Name ▼

Postcode

✉ Address 1: ZIP/Postal Code ▼

Save

Remove

Cancel

#### Copied Data

Select any fields of company data that should be copied into the record.

Accounts Filing Date

▼

Accounts Type

▼

Annual Return Date

▼

CCJ Summary End Date

▼

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 company information functionality to.

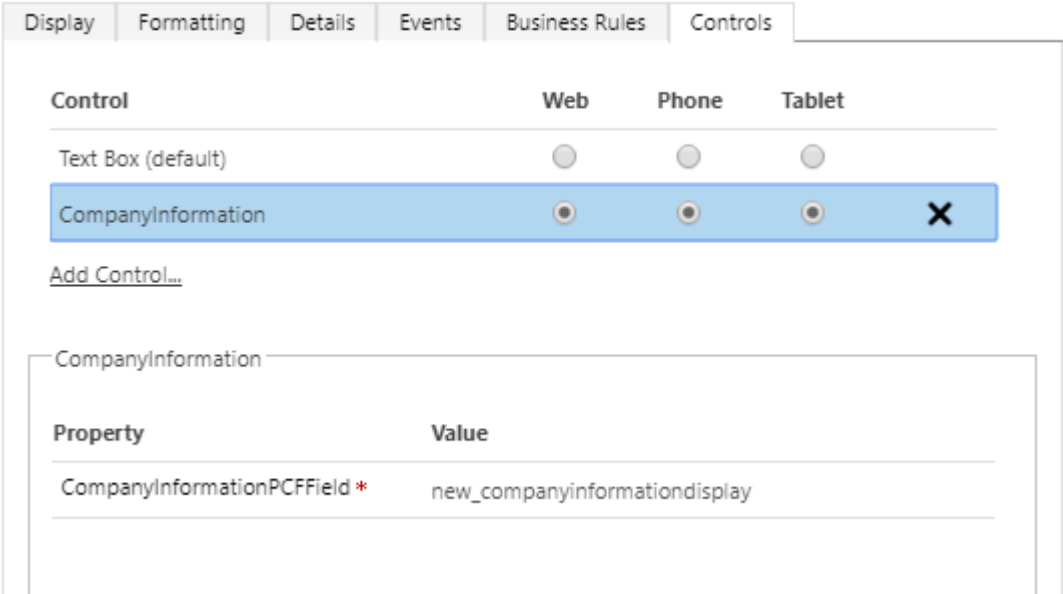
By adding this configuration, the solution will automatically create a data8\_companyid field on the entity you have selected. This field is a lookup to the Company entity included in the solution which holds all the details of the company. You can use this relationship in Advanced Finds etc. as for any other field.

# Adding Business Insights to your Form

Using the classic form editor, you can assign custom controls to any field – within the company information solution is a `Company Information` custom control which can be used on a custom field in order to quickly show credit rating, recommended limit and the last checked date. On this custom control are also buttons to obtain the latest information, provide quick access to the associated company entity, and remove the association between the company and the record.

You will need a field on the form that is unused – you could either make a new field or select an unused field. The value of this field won't actually be used but unfortunately you are currently unable to add a custom control to a lookup field.

Once you have added the field (in classic form editor), double click the field and select “Controls” from the top tabs and select the “CompanyInformation” control. When you have finished, save and publish the changes to your form.



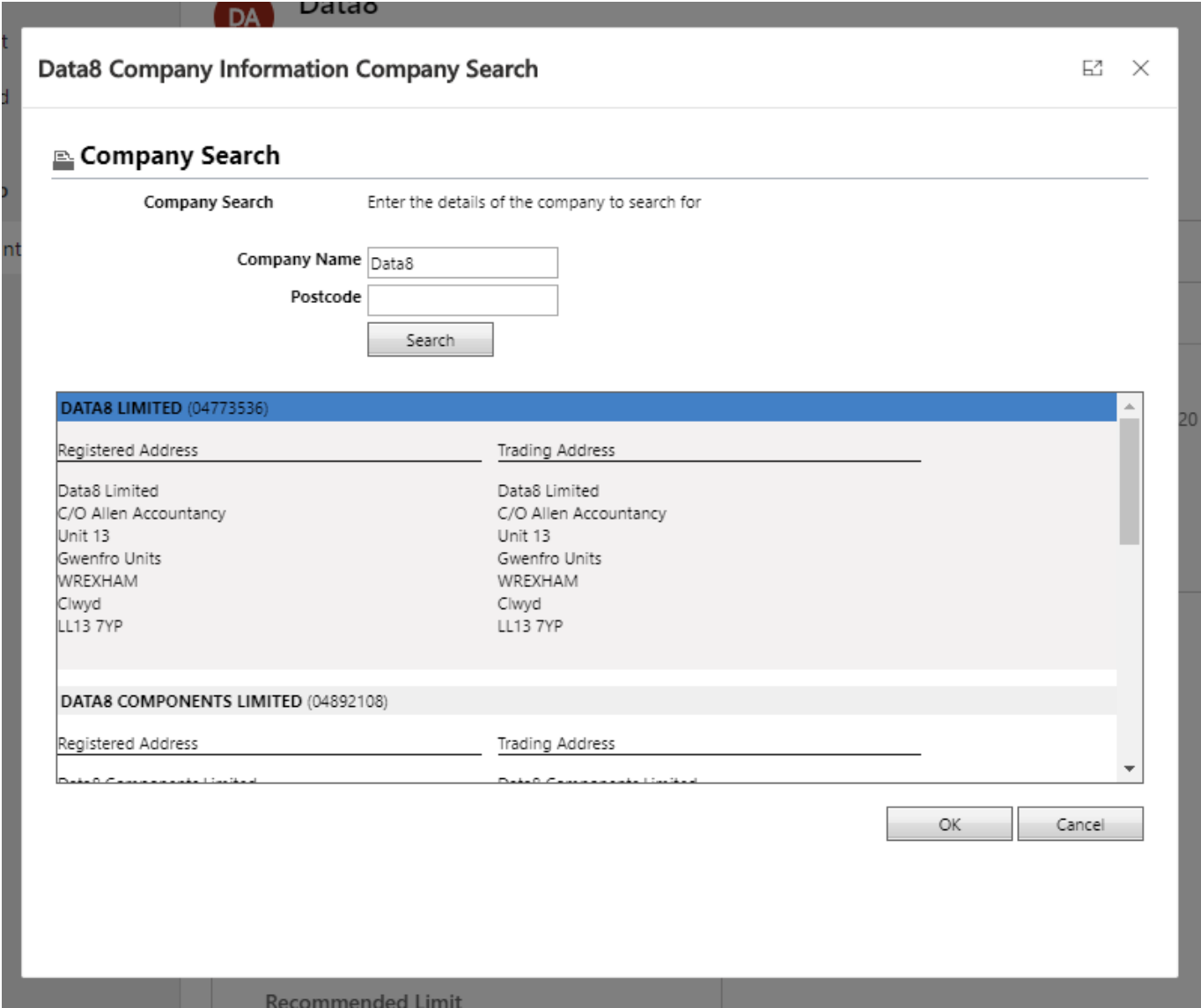
# Using Business Insights

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

Credit Rating	Not Available
Recommended Limit	Not Available
Last Update	Not Available
<input type="button" value="Get Business Insights"/>	

The “Get Business Insights” button will 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, with any that match the postcode at the top of the list. Postcode matches are highlighted with a green tick.




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.

The traffic light display will be replaced by a “Loading...” progress indicator while all the information related to the selected company is retrieved. Due to the amount of information available this may take some time, so please be patient.

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

---

Credit Rating		
Recommended Limit	£150,000.00	
Last Update	1/5/2020	
<a href="#">Update Business Insights</a>	<a href="#">View Details</a>	<a href="#">Remove</a>

---

# 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” link. 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 Date	--	CCJ Summary End Date	--
Number of CCJs	--	Number of Writs	--
Total CCJ Value	--	Latest Financials	2016-04-01 - 2017-03-31
Outstanding Mortgage	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 “Update Business Insights” button 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 company information system

### User Roles

For a user to have access to the company information 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 Data Company Information 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 “Company Information Countries” option under the main CRM Settings menu.

### Extensions



Company Information...

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.

Business Unit*	Ireland		
UK	No	Ireland	Yes

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.