

AFD Bank Finder User Guide

Installation guide for AFD BankFinder
solution in Microsoft Dynamics 365 Sales

Version 2.0.0

afd
SOFTWARE



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This document is a step-by-step user guide to help you download, install, and configure the latest AFD point of entry Bank Finder solution for Microsoft Dynamics 365 Sales.

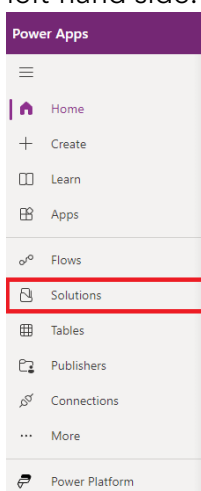
First, you will need to import the AFD solution into your Dynamics 365 Org. To do this, please complete the following steps:

Solution Download:

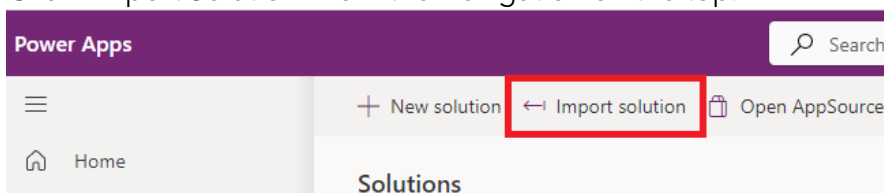
1. Download the [Bank Finder](#) solution.
2. Download the [Additional Information](#) solution.

Solution Installation:

1. Open the [Power App maker portal](#).
2. Navigate to the "Solutions" tab using the Navigation on the left-hand side.



3. Click "Import Solution" from the Navigation on the top.



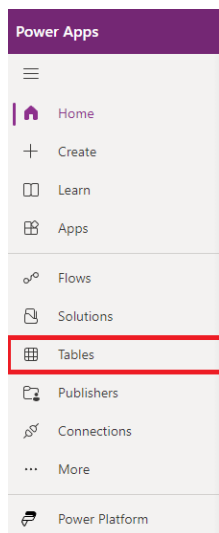
4. Select the Bank Finder zip file that you downloaded using the hyperlink in the "Solution Download" section, and then proceed through the Installation wizard.
5. Next, we will install the Additional Information Solution which will be used to store additional details about the record downloaded from AFD.
Simply repeat sets 3 & 4 using the Additional Information zip file downloaded using the hyperlink in the "Solution Download" section.

The Solutions have now been installed and the tools are ready to be added onto your Forms.

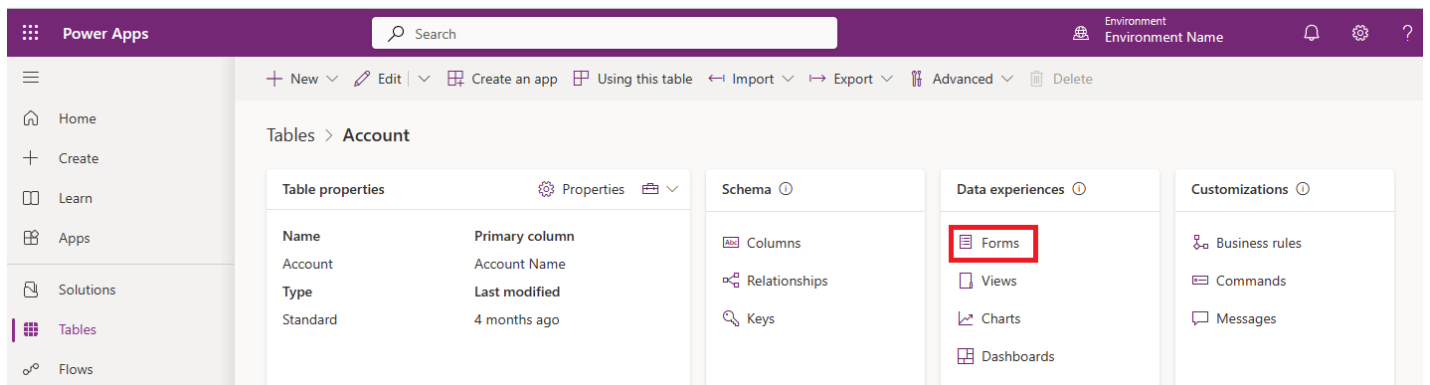
Form Configuration:

You will need to complete the following actions for the tables that matter to you. For this guide we will be using the Account table.

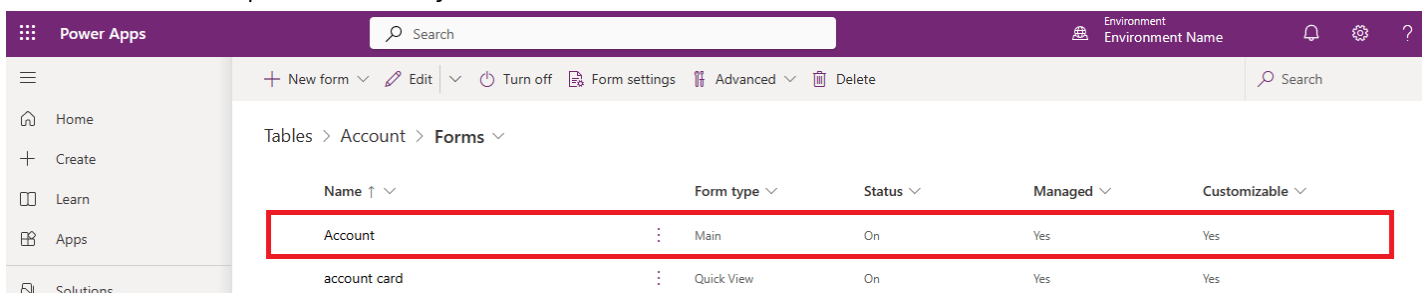
1. Open the [Power App maker portal](#).
2. Navigate to the "Tables" tab using the Navigation on the left-hand side.



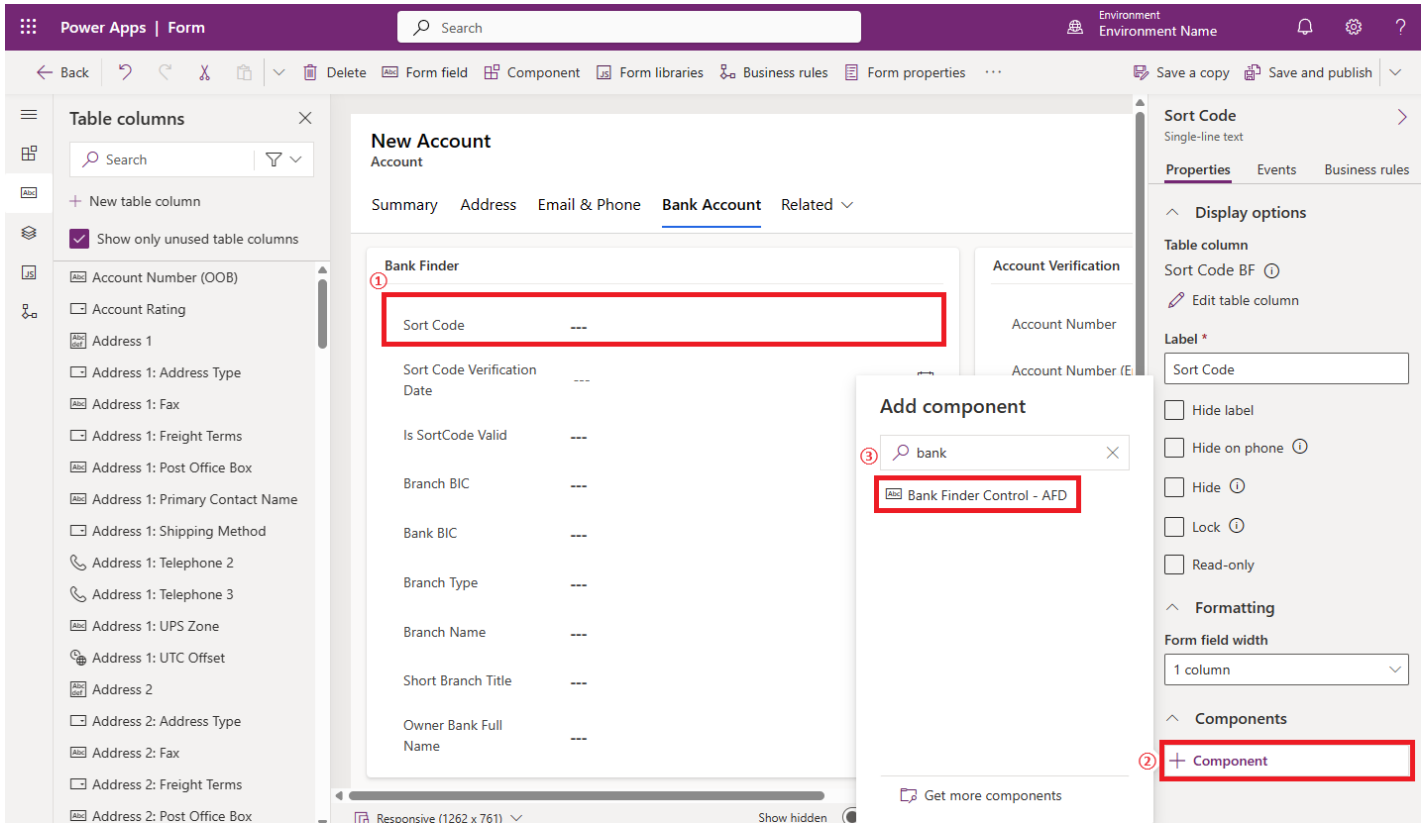
3. Open the Table you wish to add the controls too.
4. Open the "Forms" section.



5. Open the Form you wish to add the controls too.



6. Add the control to the appropriate Sort Code field.
 1. Select the field.
 2. Click the "+ Component" button.
 3. Select the "Bank Finder Control - AFD" control.



7. You will now be prompted to configure the control. See the "Control Configuration" section for what each option means.

Control Configuration:

Input Source

There are 2 options available in the dropdown.

1. Standard
2. Environment Variable

Standard - All the inputs in the control configuration are simple text inputs.

Environment Variable - The "AFD Serial Key", "AFD Password", and "Endpoint URL" inputs will be retrieved from a PowerApps environment variable. Simply set these 3 inputs to the unique name of the environment variable you want to use.

AFD Serial Key

This input is used to supply the serial key for your AFD Account.

Note: This will be supplied by AFD.

AFD Password

This input is used to supply the password for your AFD Account.

Note: This will be supplied by AFD.

Endpoint URL

This input is used to configure the URL that will be called.

Note: by default, this is set to the AFD hosted server.

Verification Date

This input is optional and is used to populate the chosen field with the date at which the phone was checked.

Note: If not set, then the last verification date will be stored in the Additional Information table. (Provided that it is installed, and the "Additional Info" input is set to "True").

Additional Info

This input is used to decide whether the additional details returned by the AFD Service will be written into the "Additional Information" table.

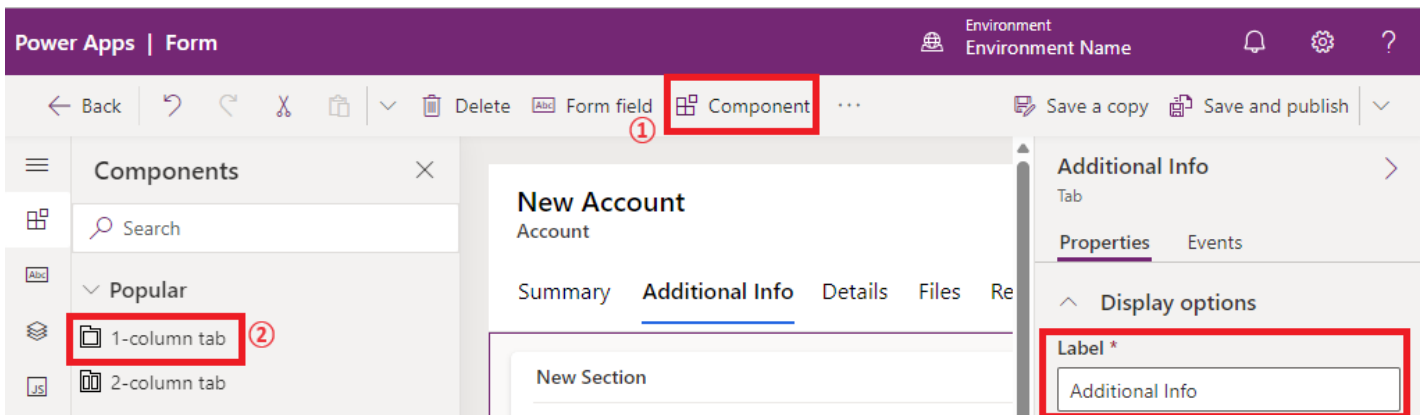
Note: See the "Additional Information Setup" section for how to configure this.

Additional Information Setup:

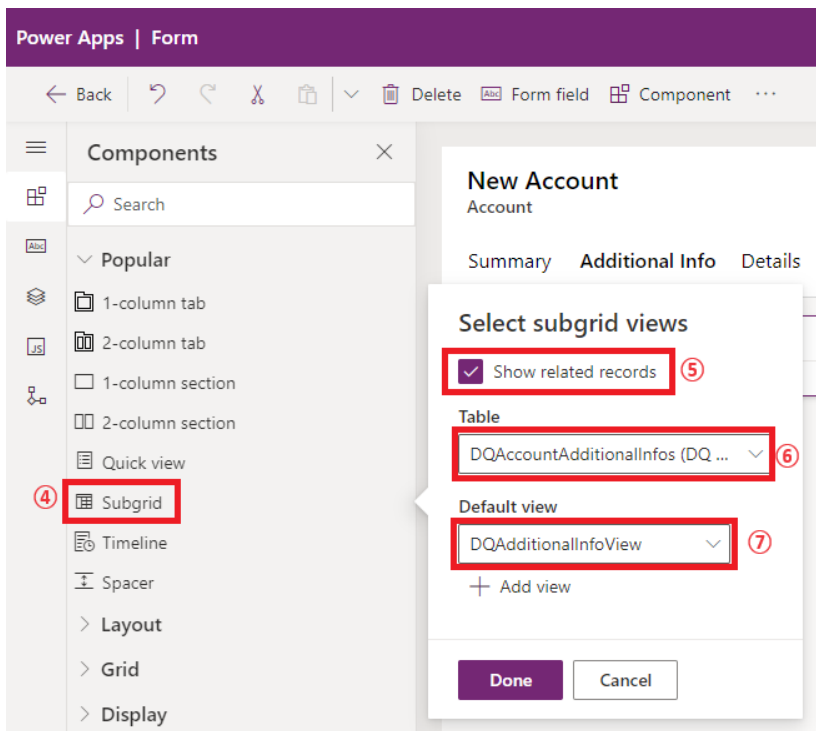
In this section, we will configure the form.

Please follow steps 1 to 5 in the "Form Configuration" section to open the desired form before proceeding with the steps in this section.

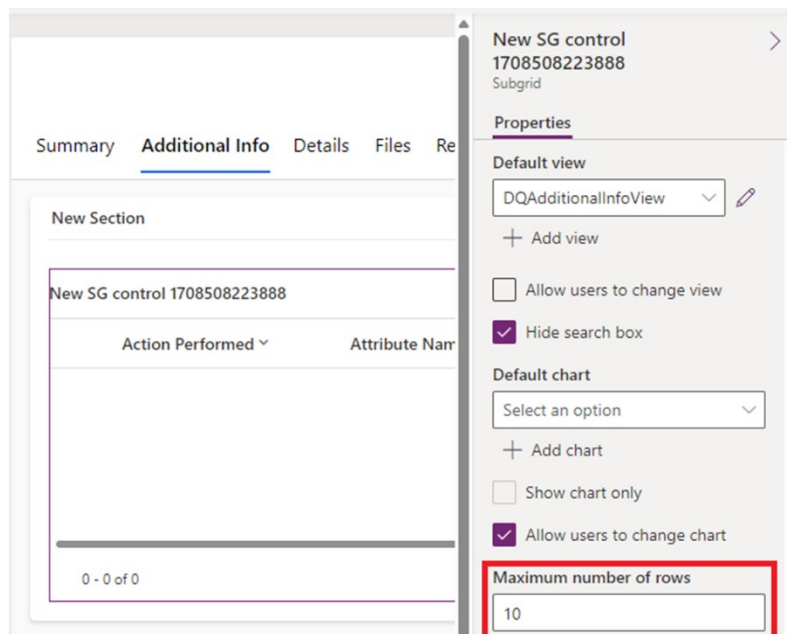
1. Click the "Component" button from the Navigation on the top.
2. Add a new "1-column tab" to the form from the Components panel on the left-hand side.
3. Update the tab label to "Additional Info".



4. Now add a "Subgrid" to the tab from the Components panel on the left-hand side.
5. Tick the "Show related records" box to limit the list of tables to only those that have a direct relationship.
6. Select the "DQContactAdditionalInfos (DQ Contact Info)" Table.
7. Set the Default view to "DQAdditionalInfoView", and then click Done.



8. Update the labels for the section and Subgrid as required. This can be done by clicking on the header and then updating the "Label" field on the right-hand panel.
9. To make full use of the Tab we will need to increase the height of the subgrid. Select the subgrid and then on the right-hand panel, scroll down to the "Maximum number of rows" setting and set it to 10.



10. Now click the "Save and publish" button to make these changes available to everyone.


Solution Testing:


1. Once your changes have been published, open the form you altered. In our example we updated the **Account** table.
2. Enter a Sort Code into the AFD Bank Finder tool and then click the button.
3. If all is working correctly you will then see the result displayed under the Email field.


1 **Demo Account** - Unsaved
Account · Account - AFD Testing ▾

Summary Address Email & Phone **Bank Account** DQAccountAddition

Bank Finder

Sort Code 

 **Valid Sort code**

Sort Code Verification Date 

Is SortCode Valid

Branch BIC

Bank BIC

Branch Type

Branch Name

Short Branch Title

Owner Bank Full Name

4. If you navigate to Additional Info Tab, you will see all the related data.

1 **Demo Account** - Unsaved
Account · Account - AFD Testing ▾

Summary Address Email & Phone Bank Account **Additional Info** Related ▾

Show Chart + New DQAccountAdditi... Refresh Flow ▾ Run Report ▾

<input type="checkbox"/>	Attribute Name ↑ ▾	Attribute Value ▾	Value ▾
<input type="checkbox"/>	BACS Direct Debit Instr...	1	Account Number: 200000
<input type="checkbox"/>	BACS Direct Debits	1	Account Number: 200000
<input type="checkbox"/>	BACS Dividend Interest ...	1	Account Number: 200000
<input type="checkbox"/>	BACS Handling Bank Co...	0002	Account Number: 200000
<input type="checkbox"/>	BACS Handling Bank Fu...	Barclays Bank PLC	Account Number: 200000
<input type="checkbox"/>	BACS Handling Bank Sh...	Barclays Bank PLC	Account Number: 200000
<input type="checkbox"/>	BACS Handling Bank Str...	01	Account Number: 200000
<input type="checkbox"/>	BACS Last Change	06/06/2005	Account Number: 200000