Address auto complete for Account/Contact records in Microsoft Dynamics CRM

Any CRM system is only as good as the data stored within it. If you wish to build a repository of Prospects, Customers, or Business Partners, you will be faced with contact information quality challenges. To ensure that the data entered is correct CRM needs to validate the address user enters in the form. This can be achieved with the help of address auto-fill mechanism, similar to one available in Bing/Google Maps.

Quick Address provides the much needed address auto-fill functionality which I feel should be there by default in any CRM system. The functionality allows users to capture accurate and correctly formatted addresses directly in the CRM by entering a postal code or typing the first few characters of the address. You can then simply choose the correct address from a list of options to see the data entered into the correct fields. It is an excellent way to reduce both input errors and keystrokes simultaneously.

Quick Address makes use of Google Maps API by modifying the example provided here - <https://developers.google.com/maps/documentation/javascript/examples/places-autocomplete>

In this post, I will walk you through steps to install & start using Quick Address on Account form.

1. Install Quick Address by importing the managed solution into your CRM System.
2. Open Account Form in customization view & navigate to Insert Tab to insert a new Tab (Single Column) on the form.

**Note:** This form is the *‘Information’* form & not the new *‘Account’* form of CRM 2013 UI

1. Rename the Tab as *‘Quick Address’* OR any desired name.
2. Now add a new web-resource named *unizap\_QuickAddress.html* as shown in the following images.
3. Save & Publish the form after you insert the Web Resource.
4. Now open a new Account record from your CRM system to see the Quick Address tab as shown here.
5. Start typing the company name or first few characters of the address in the search box under Quick Address tab.
6. Select any one address from the list that shows up as you type.
7. Upon selecting an address, the following fields (if present on the form) will get populated with relevant data.
   * name
   * address1\_name
   * address1\_line1
   * address1\_line2
   * address1\_line3
   * address1\_city
   * address1\_stateorprovince
   * address1\_country
   * address1\_postalcode
   * address1\_telephone1

* websiteurl

1. Modify the fields as desired & save the record.

There you go – you have quickly created an Account record without wasting much time entering account information.

Quick Address extracts the following information from the selected address:

* **street\_number** - indicates a precise street address
* **route** -  indicates a named route (such as "US 101").
* **sublocality** - indicates a first-order civil entity below a locality.
* **locality** - indicates an incorporated **city** or town political entity.
* **administrative\_area\_level\_1** - indicates a first-order civil entity below the country level. Within the United States, these administrative levels are **states**. Not all nations exhibit these administrative levels.
* **administrative\_area\_level\_2** - indicates a second-order civil entity below the country level. Within the United States, these administrative levels are **counties**. Not all nations exhibit these administrative levels.
* **country** - indicates the national political entity.
* **postal\_code** - indicates a postal code as used to address postal mail within the country.
* **International\_phone\_number** - phone number in international format. International format includes the country code, and is prefixed with the plus (+) sign.
* **website\_url** - The authoritative website for the company, such as a business' homepage.

You may change the code to set form fields as per your requirements OR please write to us if you need customize Quick Address the way you want it to work.

Thank You.