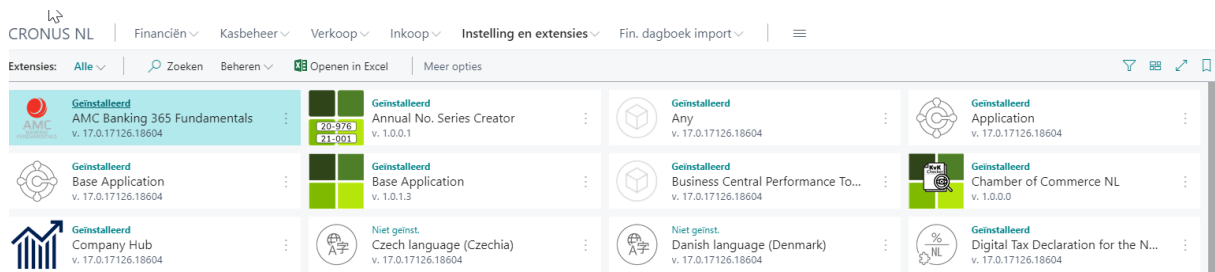**Company Lookup**

This document describes the functionality for the use of the "Company Lookup" app, created by Micro Apps. The app is designed and developed to find online company information such as address, phone numbers and homepages. Use this app to automatically find your customers, vendors, and contacts information in Microsoft Dynamics 365 Business Central.

Installation:

The installation of the Company lookup app is available via the Microsoft Marketplace for Business Central extensions/apps. From here you can automatically install the extension and make it available within every company within your Business Central environment.

For the correct working of the app, make sure that the setting of the Micro Apps Base App is set for "allowing HttpClient Request".

Configuration:

After the installation has been completed, the page **Company Lookup Wizard** is available in Business Central. With this configuration wizard we can set up the company lookup application step by step.

Once the installation is complete, the app needs to be set up. This can be done with the Company Lookup Wizard. This wizard contains all the necessary steps to completely set up the extension. The first step is to register yourself and to activate the trial or subscription. With the trial, you can use the app two weeks free of charge. After the trial period, you need to activate the subscription. Make sure both fields are checked (like the example in the picture at the right)

Company Lookup Wizard

Welcome to the Company Lookup app setup

This app searches for online customer, vendor, and contact information in Microsoft Dynamics 365 Business Central based on the company name.

Get Started!

This setup wizard configures the Company Lookup app created by Micro-Apps. In the next step we wil activate the app.

Next

Company Lookup Wizard

Beforehand - Activate trial/subscription

To use this app, you need to register yourself. If you have not registered yet, click on the 'Register' button, fill in the required information on the page and click on 'Register or Update Tenant Information'.

Tenant Information Registered

To use the this app, you need to start a free trial or subscription. If you have not done this yet, click on 'App Card' and activate a trial or subscription.

App Activated

Click on 'Next' if you have a trial or subscription for this app.

Back   Register   App Card   Next

Permissions Sets

To make sure that the users have the correct permissions to use the Company Lookup app. the permission set 'Company Lookup' is automatically assigned to every user. You don't have to do anything to set the permissions.

Company Lookup Wizard

Permission Sets

The users of the app do not need additional permissions to use the app. The permission set 'Company Lookup' is automatically assigned.
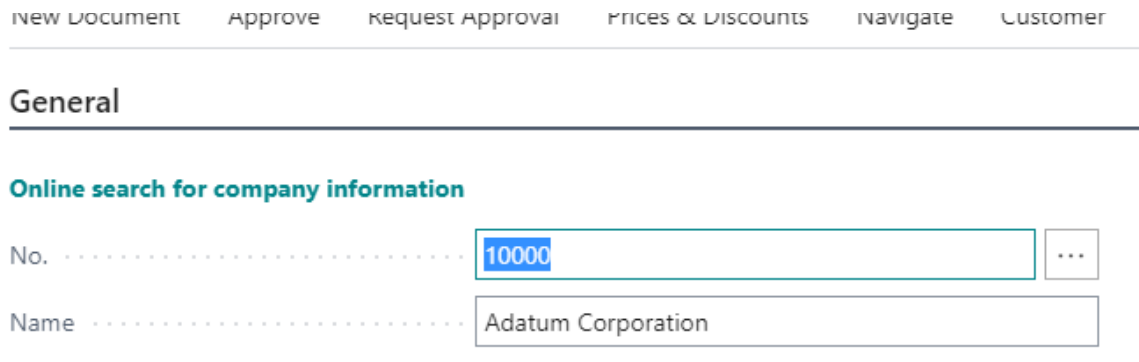
Back   Next

Company Lookup Wizard

✓

The Configuration wizard has finished!

You are now able to use the Company Lookup app. To close this setup, choose Finish.

Back   Finish

Using company lookup

After the installation has been completed, the search label is available on the customer, vendor, and contact cards in Business Central. This clickable link opens a search page.
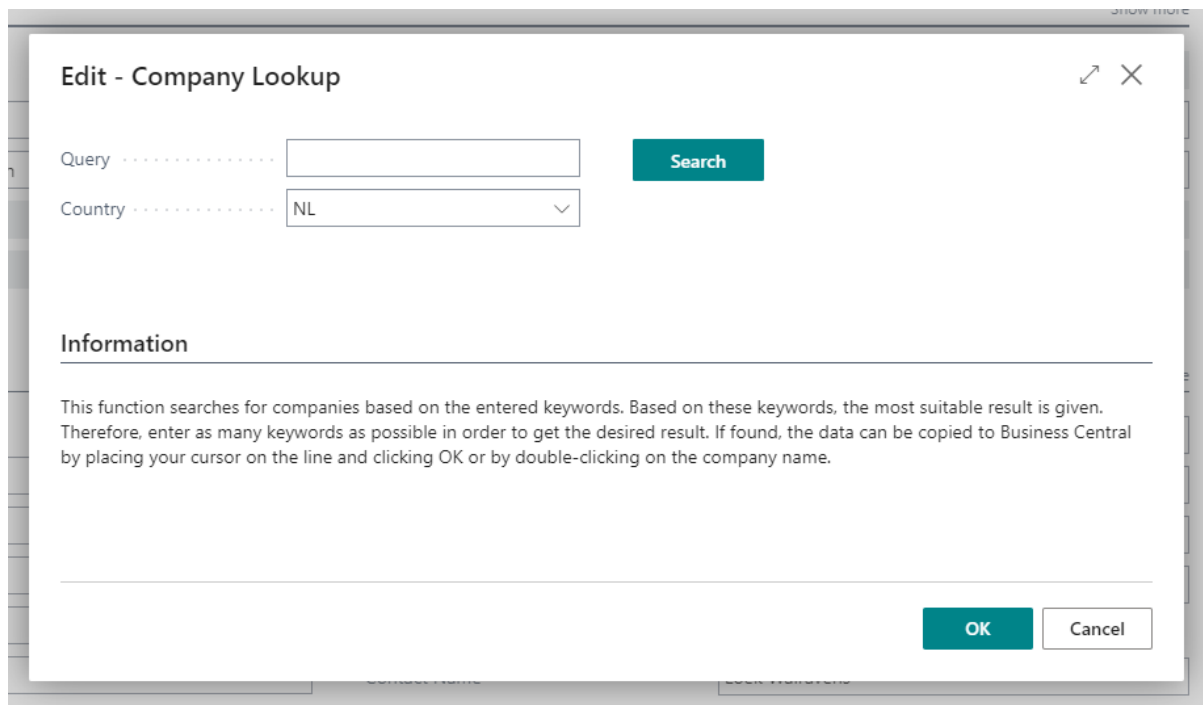
With the installation of the extension, company lookup is automatically enabled for the three cards within Business Central. To start the process, create a new customer, vendor or contact and click on the "Online search for company information" link. The search page opens


Queries

Within the name field you can type your query. This query can be just a company name or a company name with city name. For the best results use **company name + city name**. The search function uses a fuzzy search algorithm what shows a minimum number of results. don't get the correct value then repeat your search with more keywords. The more precise you define your query. The best result will appear.

Country

Use the country field to select the country you want to search in. If the country is not in the list, then add a new country to the country/region table. Don't forget to fill in the "Street format" and "int. country name" fields.

After describing your query and country code, click on the search button to find the company. A list with up to 5 results is shown. Click on the best fitting company name to fill your Business Central fields.
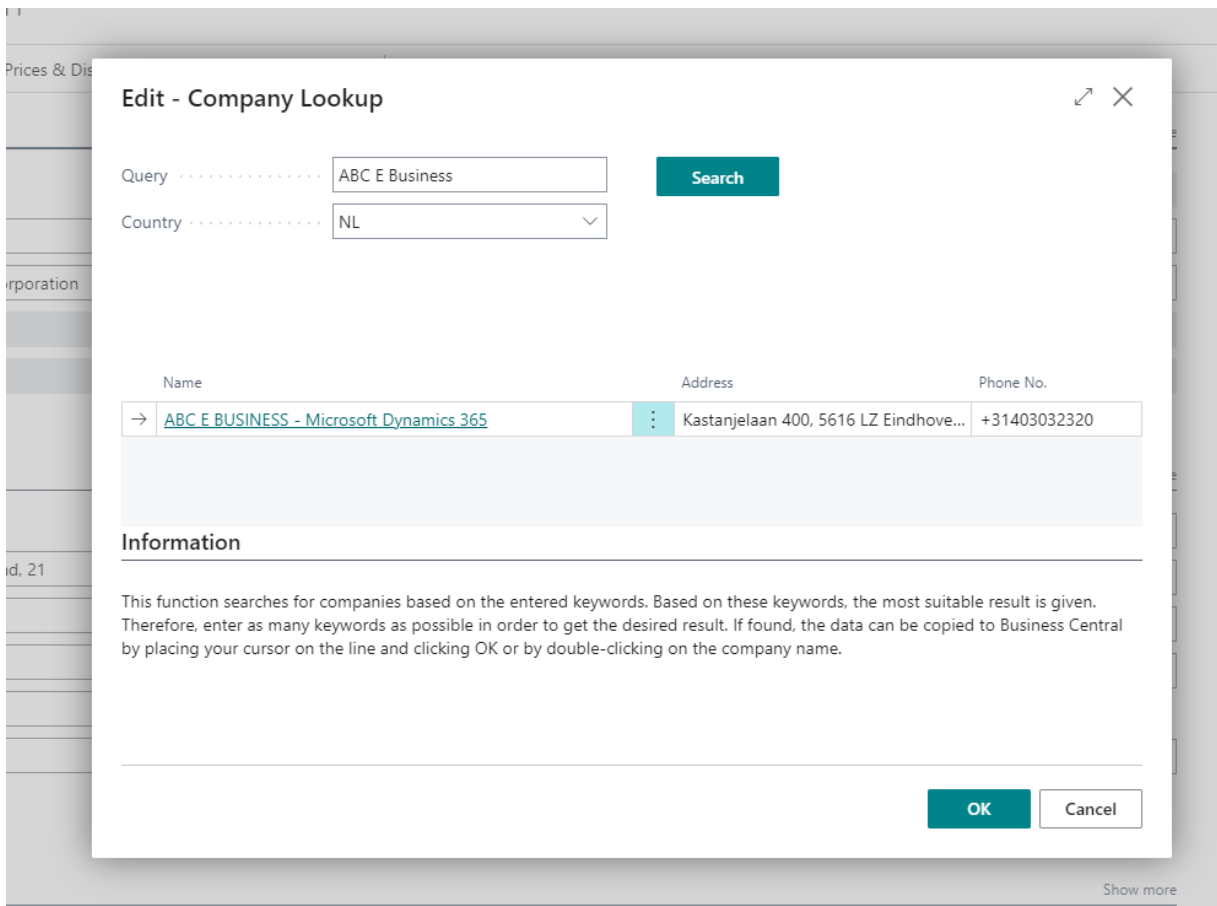
After clicking on the company name, the result is visible in the card for the fields: Name, Address, Country/Region, City, Post Code, Phone No and Home Page.