



NuSoft is excited to join the Avtex family

Map

Version 9.0.0.0

User Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to use Map. It includes step by step instructions, with screenshots.

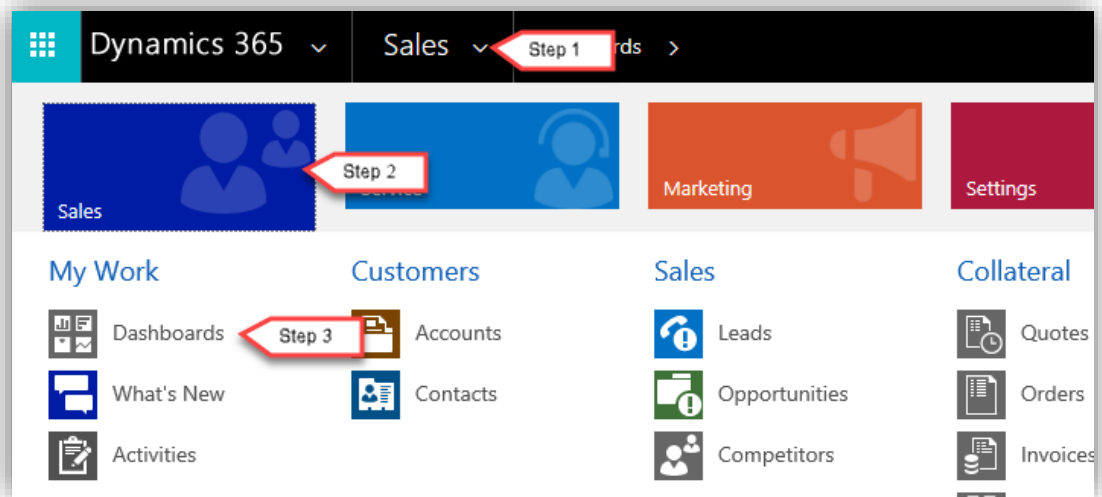
Map allows users to visually view data on a map. It is a sales dashboard that offers users the functionality to create a driving route for their appointments for a specific date. Each entity is displayed with a different icon on the map and all views that are currently being displayed on the map are listed under "Views Displayed."

Features:

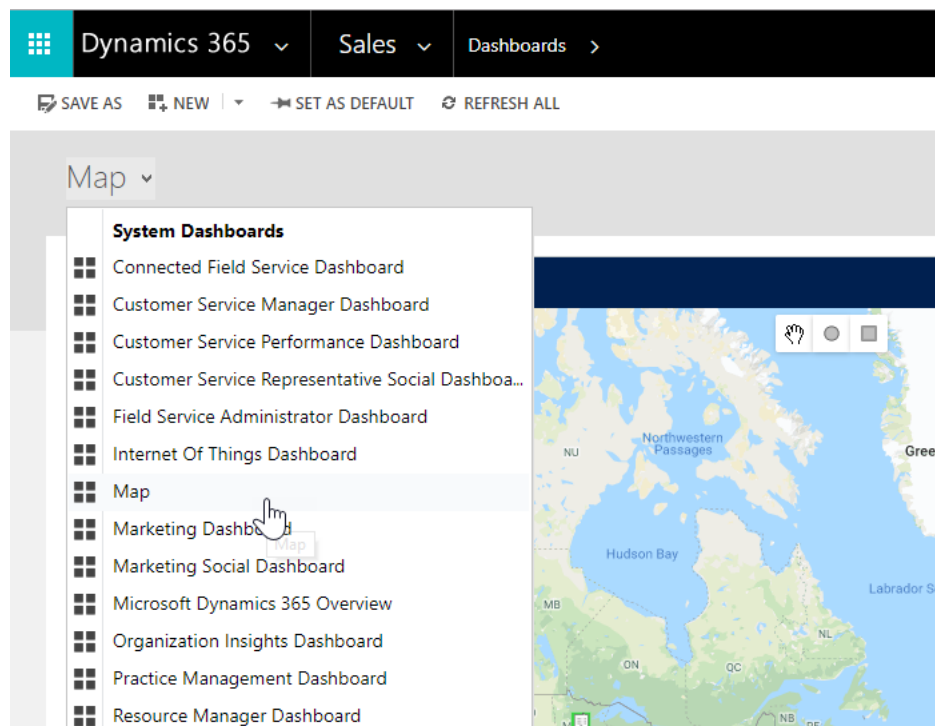
- Ability to see records with latitude and longitude data on a map
- Viewing entity records on a map
- Routing driving directions between home, work, and appointments
- Capability to load more than one view on map and views from different entities at the same time
- Displaying custom as well as system views
- Showing territorial alignment enabling customers to be added to a marketing list by circling them
- Allows you to reassign records by selecting region
- Ease of scheduling appointments by simply selecting a pin

Viewing Map Dashboard

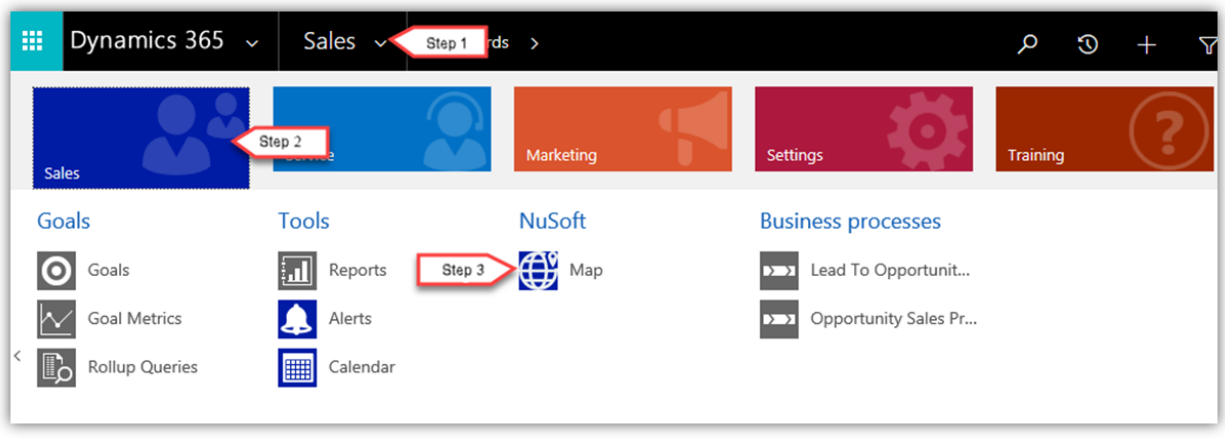
1. To start using Map Dashboard navigate to **Sales -> Dashboards**.



2. Select **Map** dashboard from the drop-down list.

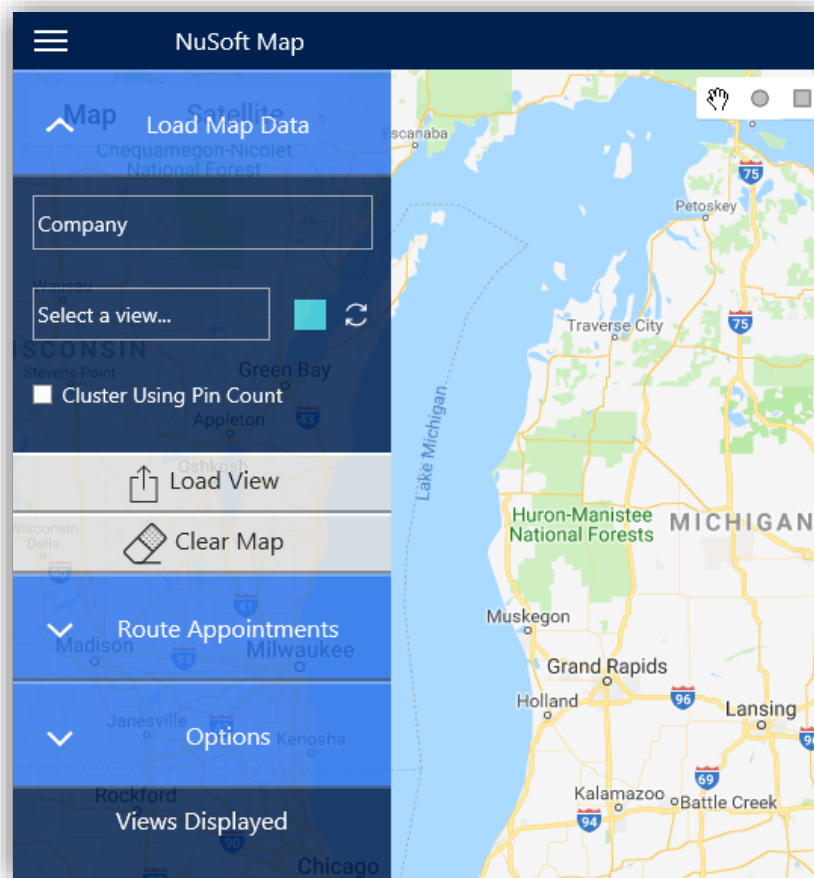


Map can also be accessed through **Sales -> NuSoft -> Map**. (It shows enlarged version of the Map)

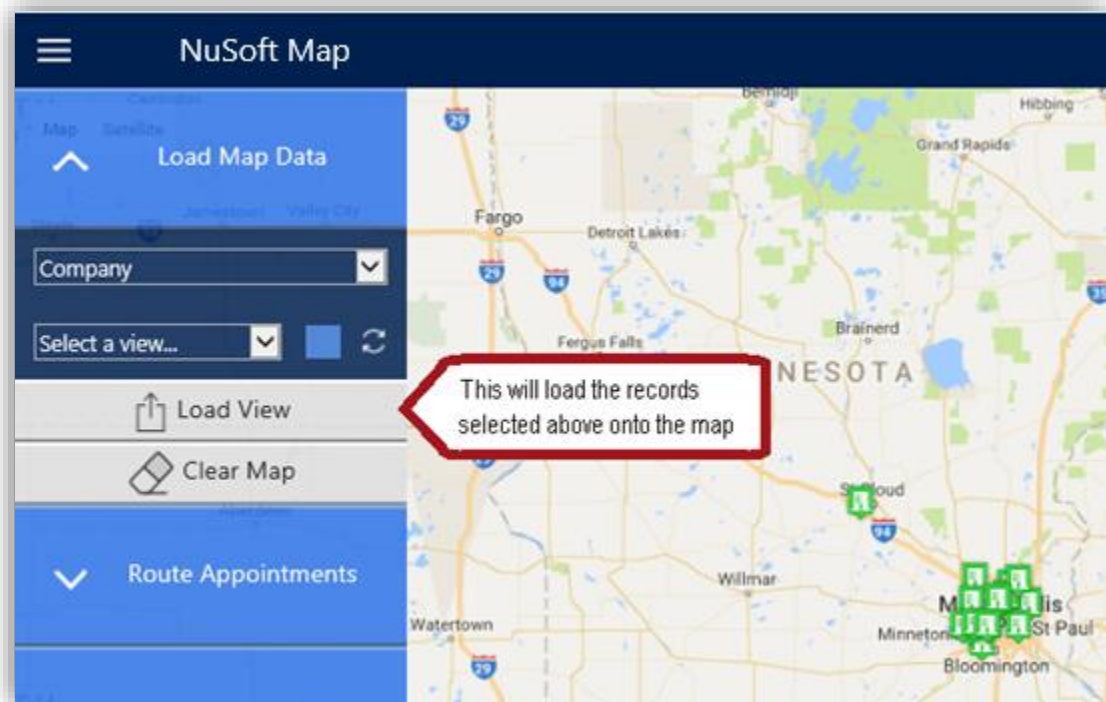
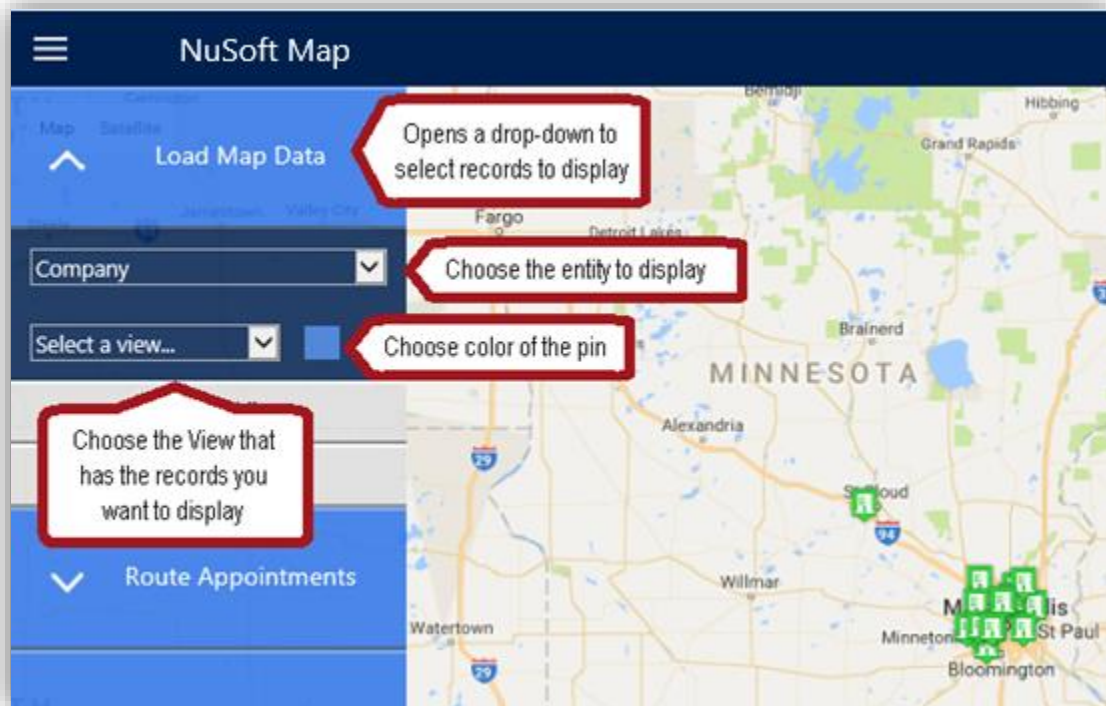


Displaying Data

To visualize CRM data on the map, click the three lines in the top left corner of the map to display the menu bar.

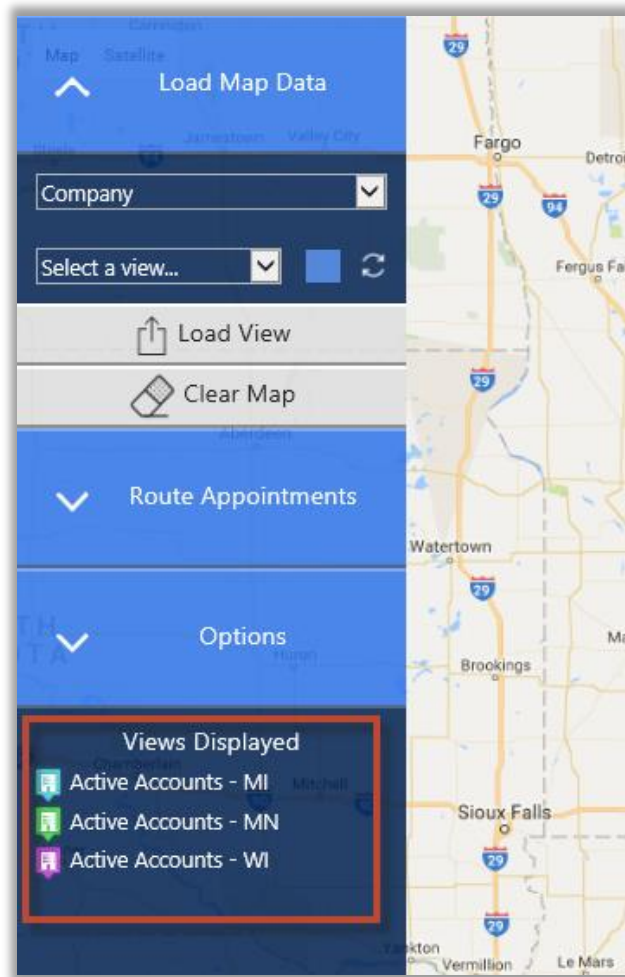


From the **Load Data Map** button select an Entity (Account, Contact or Lead) and a View (system view or personal Advanced Find view) and a color. Click **Load View** to display the data on the map.

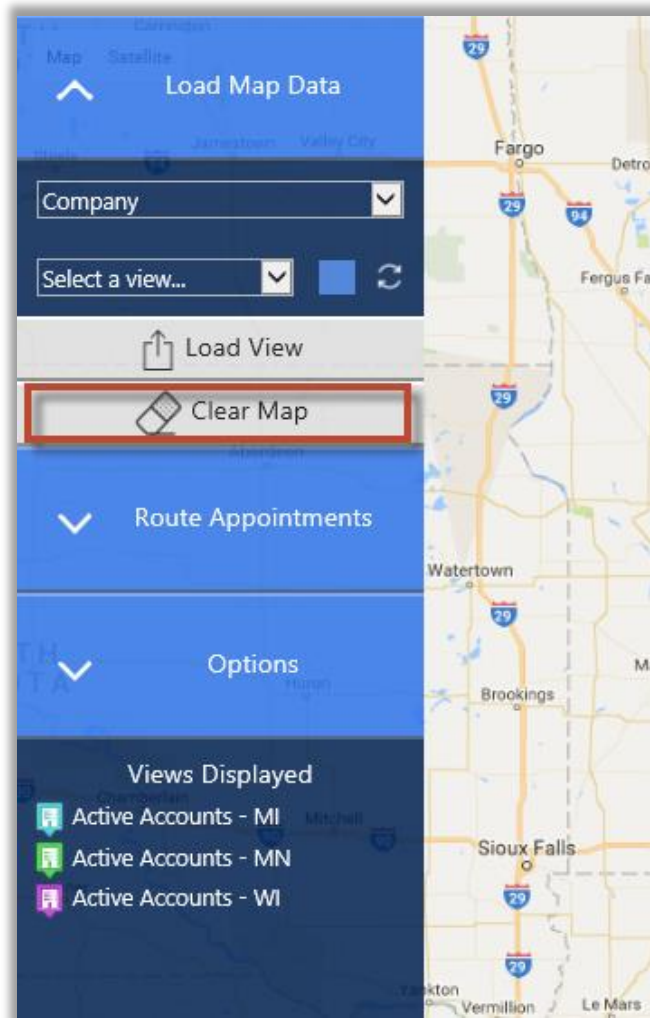


NOTE: You can load more than one view on the map and views from different entities at the same time.

Each entity is displayed with a different icon on the map and all views that are currently being displayed on the map are listed under “**Views Displayed**”.



To clear all data from the map simply click the **Clear Map** button.



Viewing Clustered Locations

When there are multiple icons on top of each other on the map clicking the cluster displays them in a spread out view and when the icon is highlighted it displays the name.



Customize Views Using Advance Find

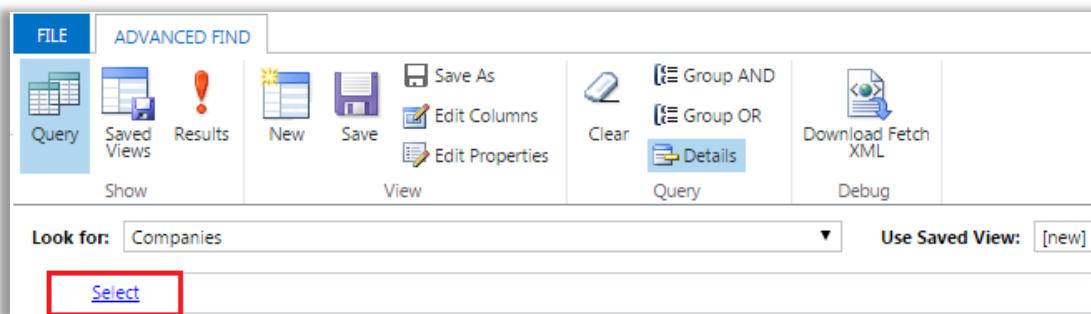
Map allows users to display custom views as well as system views. To create a custom view, for example customers near a zip code:

1. Click **Advance Find** on CRM menu on the top of the page

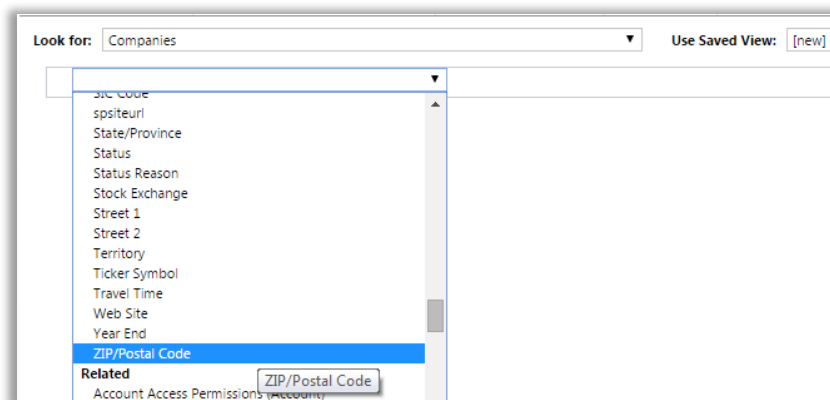


2. In the **Advance Find** window, select the entity to **look for**; then proceed to enter search criteria. For example; to find companies in the Detroit area, one might consider searching for all companies with a ZIP code starting with 482XX.

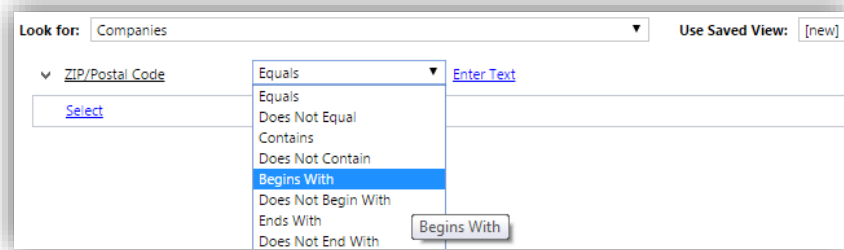
To do this, first click **Select**



Then specify the field, in this case, **ZIP/Postal Code**

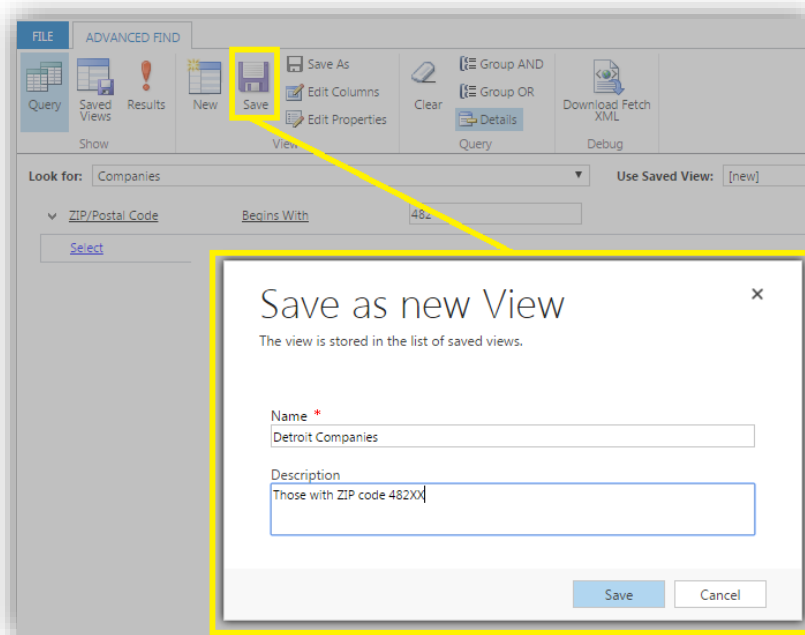


Since we're looking for **ZIP/Postal Codes** that **begins with 482**; select **Begins With**.

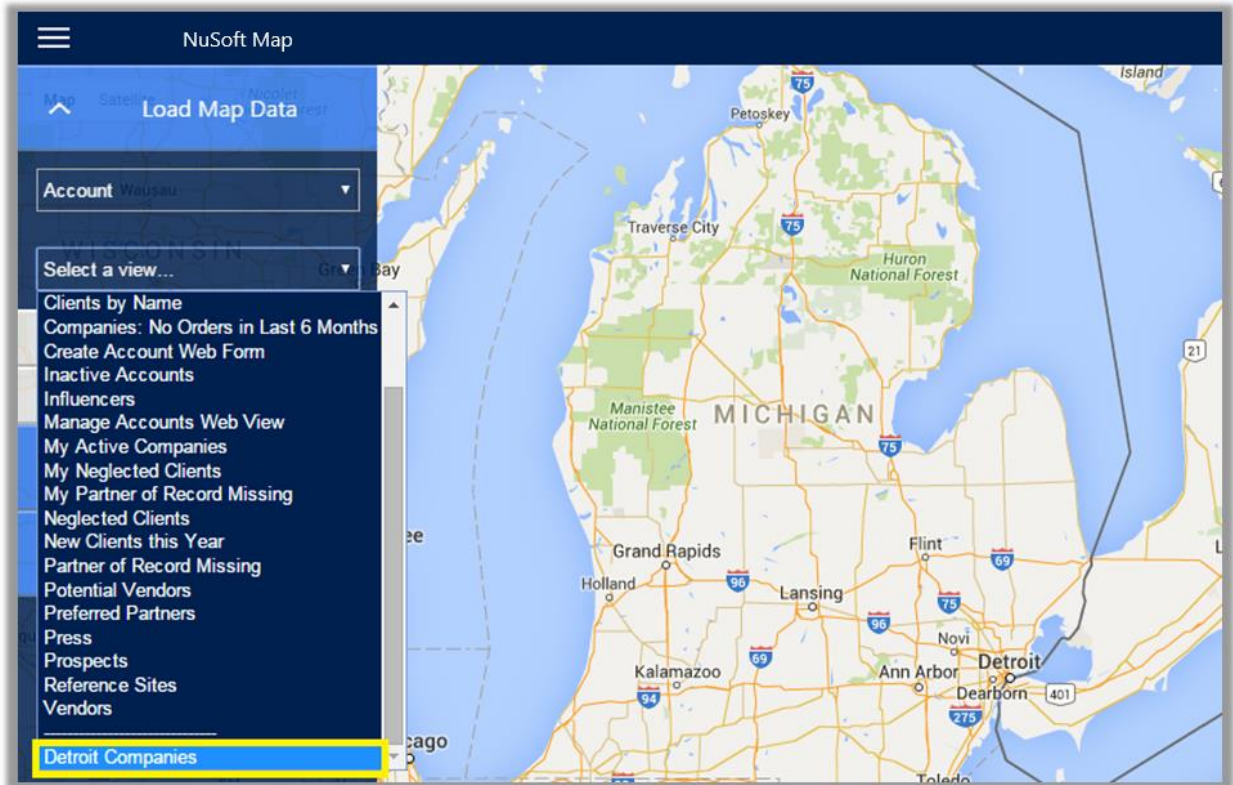


Then **Enter Text** "482"

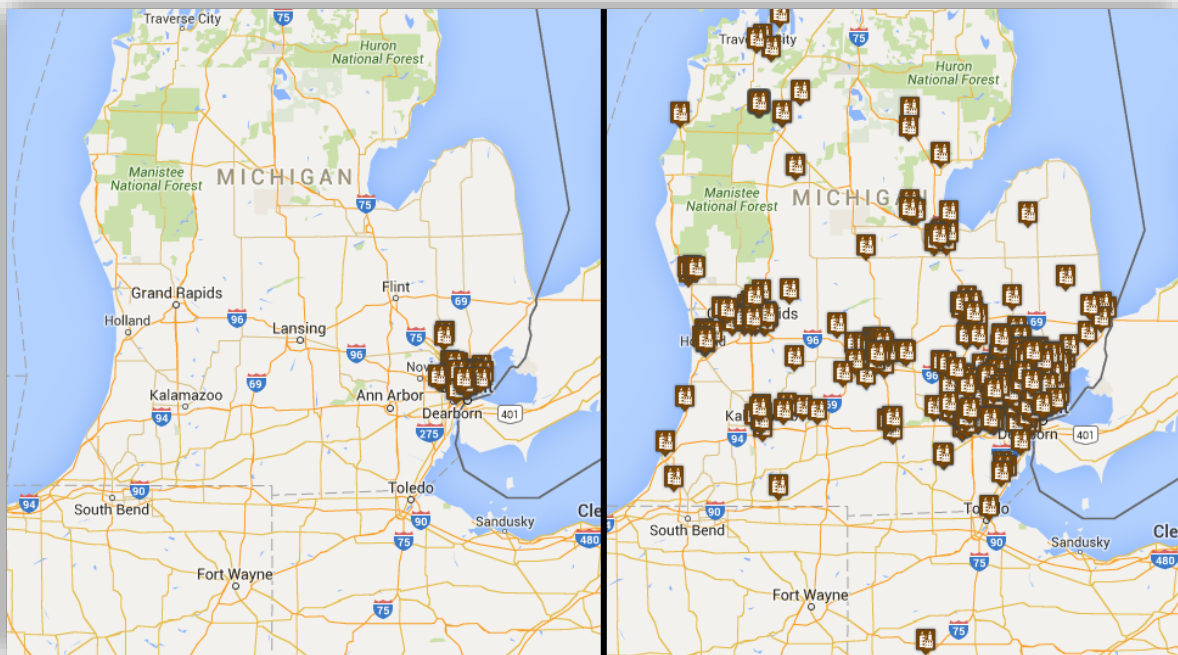
- Now that the query is complete, **Save** the custom view (**Detroit Companies** in this example):



- Now that the custom view is saved, you will be able to access the view under the entity, in this case, **Account** and use your new view; "**Detroit Companies**":




Here's what the example view looks like compared to a system view of all active companies:

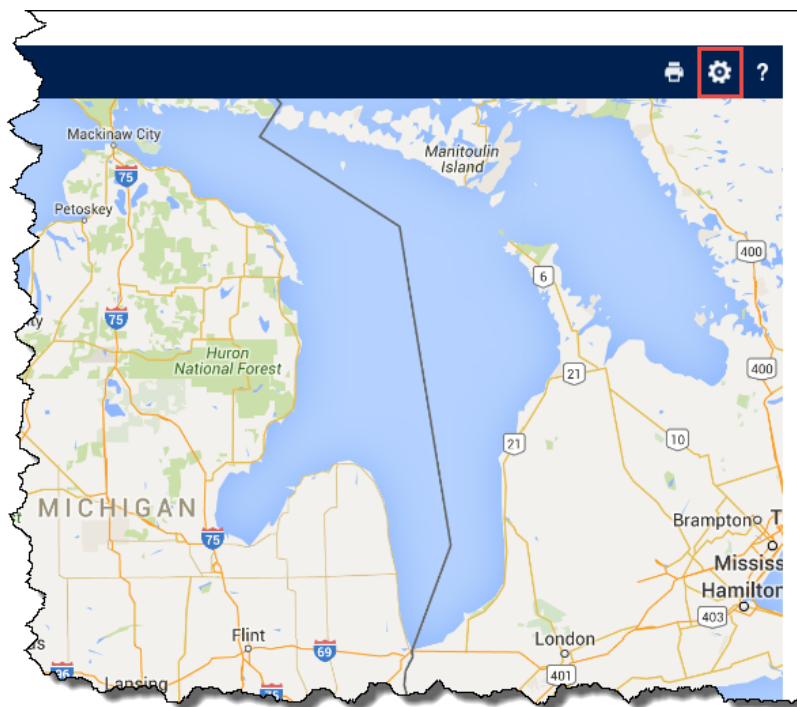



^ Custom View

^ All active companies

Routing Appointments – Set up

Before you can route your appointments you must first perform a one-time setup up of your user address preferences by clicking the **Settings** button  in the top right corner of the map.



Click the **Settings**  icon to open your preferences for home and work addresses.

Microsoft Dynamics CRM | SETTINGS | Atrio Map Settings | Brett Demoe | Create

SAVE | SAVE & CLOSE | NEW | DEACTIVATE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | ...

ATRIO MAP SETTING : INFORMATION

Brett Demoe

General

Setting*	User	Name	Brett Demoe
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User Setting

Settings

User* ● Demoe, Brett

Work Address

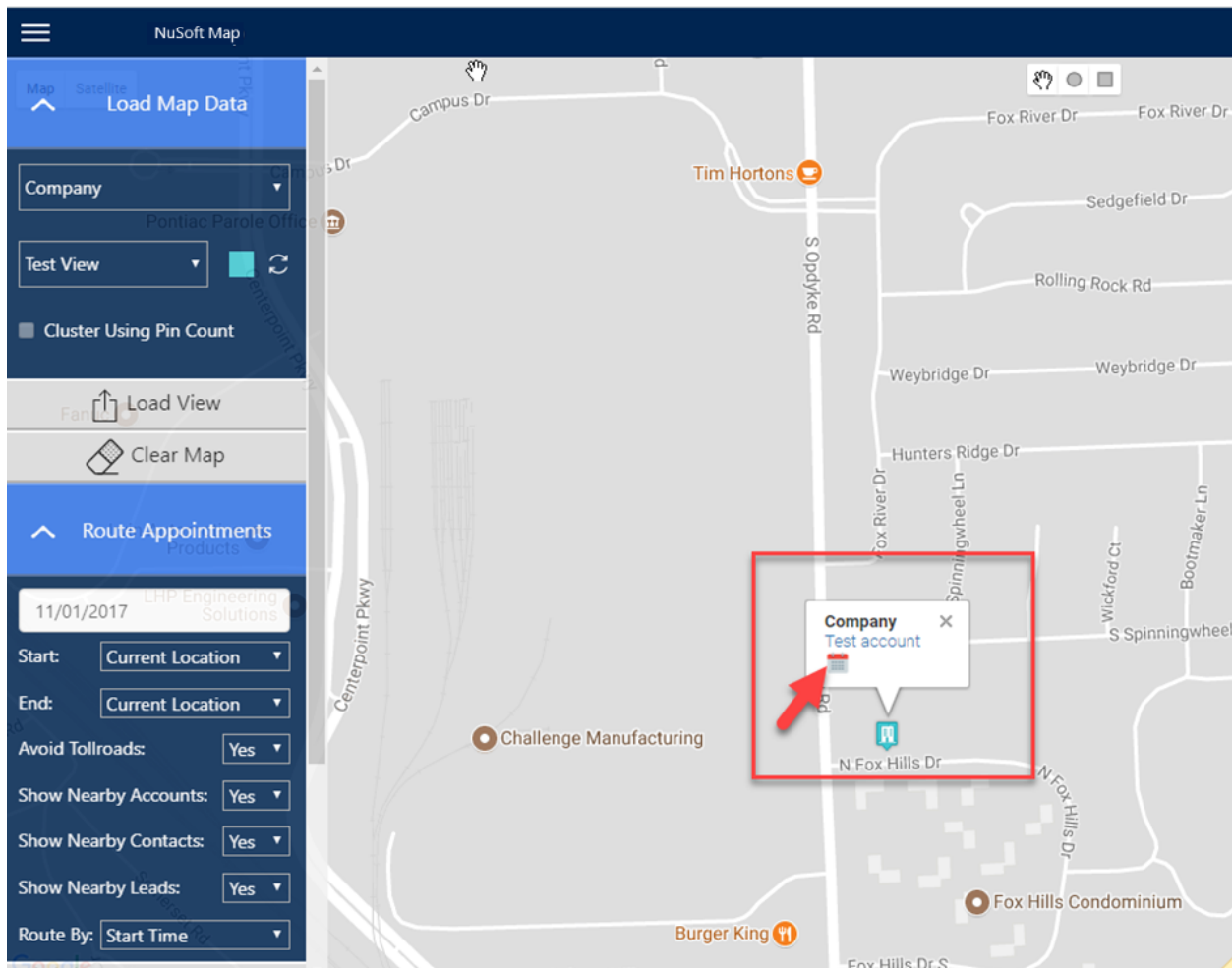
Line 1	6001 N Adams Rd
Line 2	--
City	Bloomfield Hills
State	MI
Zip Code	48304

Home Address

Line 1	--
Line 2	--
City	--
State	--
Zip Code	--

After you have set up your preferences, create an appointment first to then create a route for your appointments.

1. From the **Load Data Map** button select an Entity (Account, Contact or Lead) and a View (system view or personal Advanced Find view) and a color. Click **Load View** to display the data on the map.
2. Now click on the **Company/Contact** that is displayed on the map > Click on the **Calendar** icon



3. Make an Appointment and Click Save

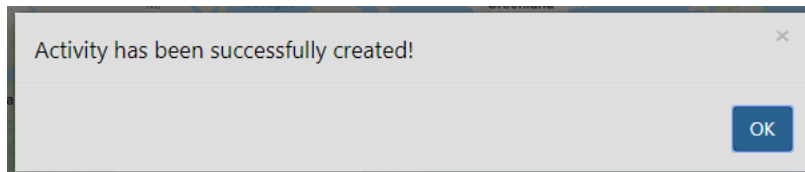
The screenshot shows the 'Quick Create: Appointment' form in Dynamics 365. The form is divided into three main sections: a left sidebar with fields for Owner, Required Attendees, Optional Attendees, Subject, and Location; a central 'APPOINTMENT DETAILS' section with fields for Start Time, End Time, All Day Event, and Duration; and a right section with fields for Description, Regarding, and Priority. The 'Save' button is located at the bottom right of the form.

APPOINTMENT DETAILS	
Start Time	6/4/2019 3:00 PM
End Time	6/4/2019 4:00 PM
All Day Event	<input type="checkbox"/>
Duration	1 hour

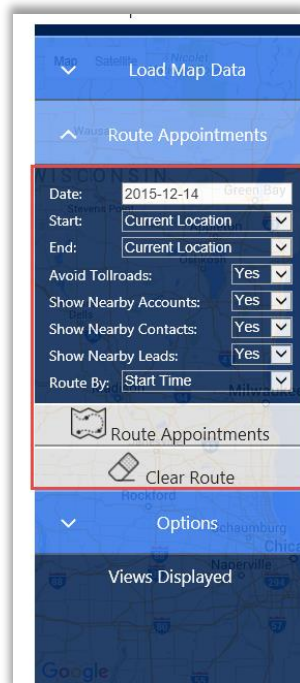
Owner: [User Icon] [User Name]
Required Attendees: [Text Field]
Optional Attendees: [Text Field]
Subject: Visit
Location: [Text Field]
Description: [Text Field]
Regarding: Southridge Video Electronics
Priority: Normal

Save Cancel

4. User should get an alert saying, "Appointment has been successfully created"

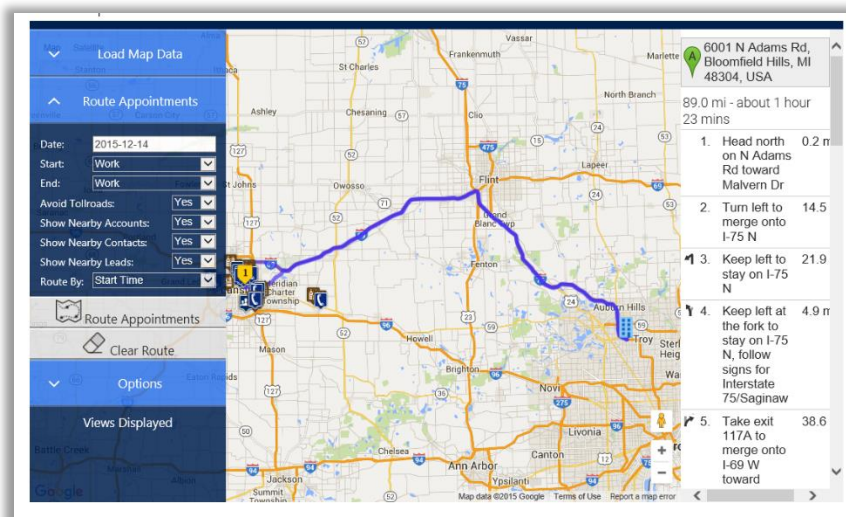


After you have created an appointment you will be able to create a route to your appointments for a selected date. Click on the **Route Appointments** button.



Select the **Date**, **Start** address, **End** address. In addition, you may allow toll roads; showing nearby Accounts, Contracts, and Leads; and the routing preference based on the appointment time or by distance.

Once the user has selected the desired start and end locations and other options, click the **Route Appointments** button to create a route and directions to and from the appointments on the selected date.



If you select **Current Location** as a **Start** or **End** address, you will have to allow the browser to use their current location. User can select allow once or always allow from this site.



Note: Routing is only available on appointments and the map location uses the address of the Account, Contact or Lead listed in the appointment **Regarding** field.

Note: Cancelled appointments are not removed from the route. To remove the appointment from a map the appointment must be deleted.

To clear all route from the map simply click the **Clear Route** button.

Routing Appointments – Walkthrough

My Appointments ▾

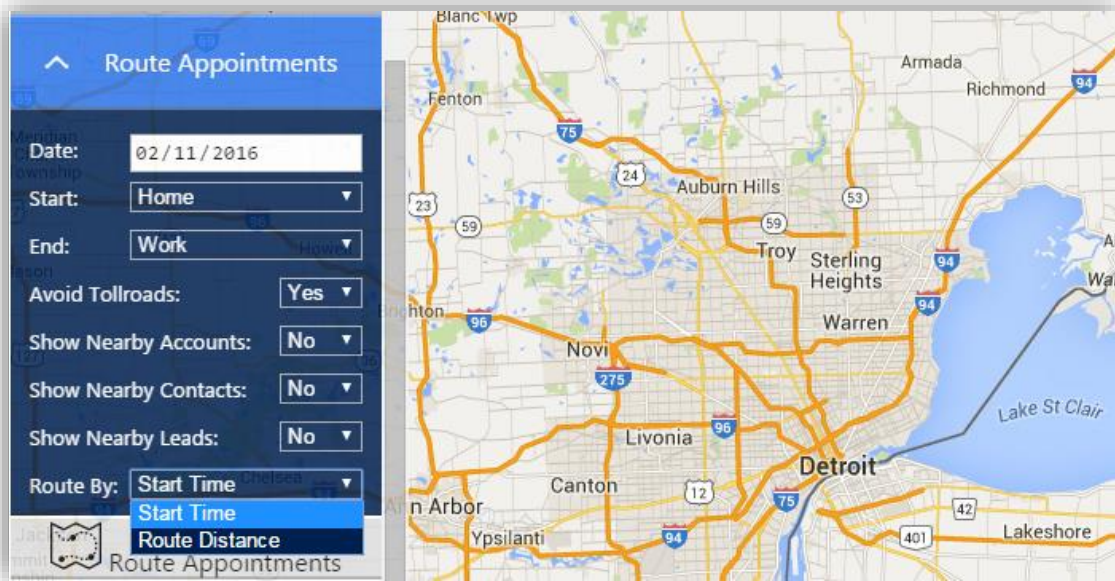
Due: Next 7 days ▾

✓	Subject	Priority	Start Time ↑	End Time	Location	Regarding
<input type="checkbox"/>	demo Atrio Maps	Normal	2/11/2016 8:00 AM	2/11/2016 8:30 AM		Baker Hopp Associates
<input type="checkbox"/>	demo Atrio Maps	Normal	2/11/2016 11:30 AM	2/11/2016 12:00 PM		Cole, Carol
<input type="checkbox"/>	demo Atrio Maps	Normal	2/11/2016 5:00 PM	2/11/2016 5:30 PM		DMC Construction

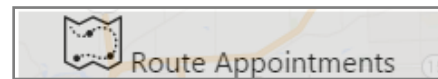
You have 3 appointments on Feb. 11; to map these appointments, you will:

1. Go to Map, click on the **menu** button on the top-right corner of the view. Select **Route Appointments** and fill in the date.
2. Pick the desired start and end locations and routing preferences;
The **Route By** option will optimize the route to either:
 - (1) Route the appointments in order of start time **[Route By: Start Time]** or
 - (2) Minimize the travel distance **[Route By: Route Distance]**

Note: Option (2) disregards the start/end time of appointments



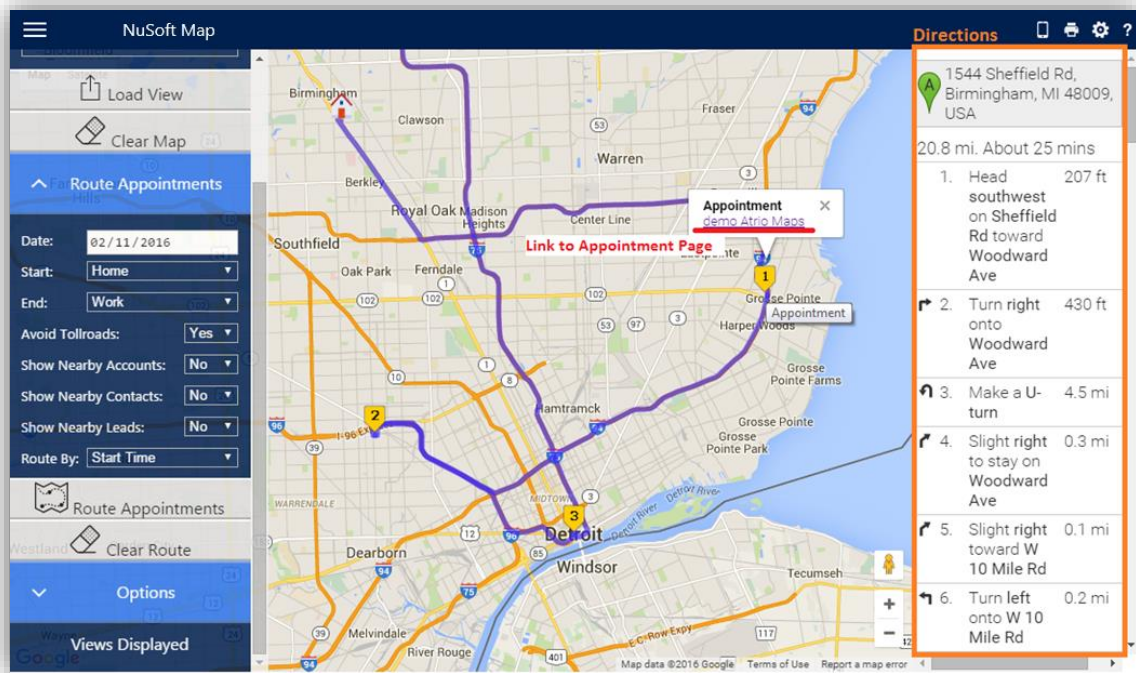
3. When finished, click Route Appointments:



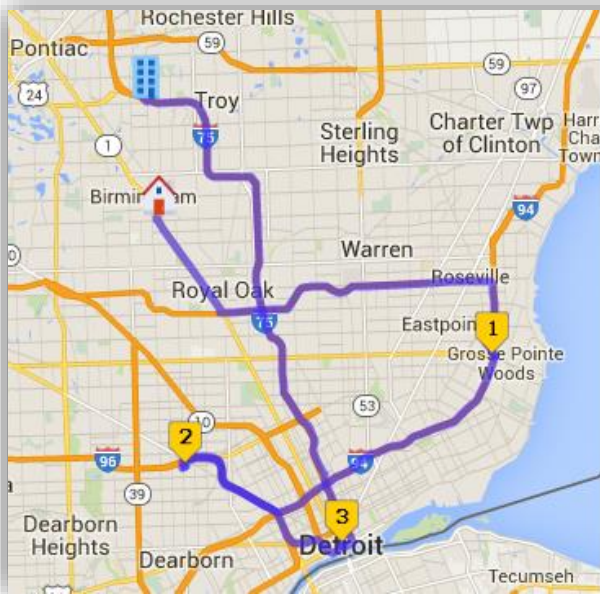
4. Once loaded, the directions will be shown on the right.

To see different numbered routings on the map, create appointments on same date with different addresses

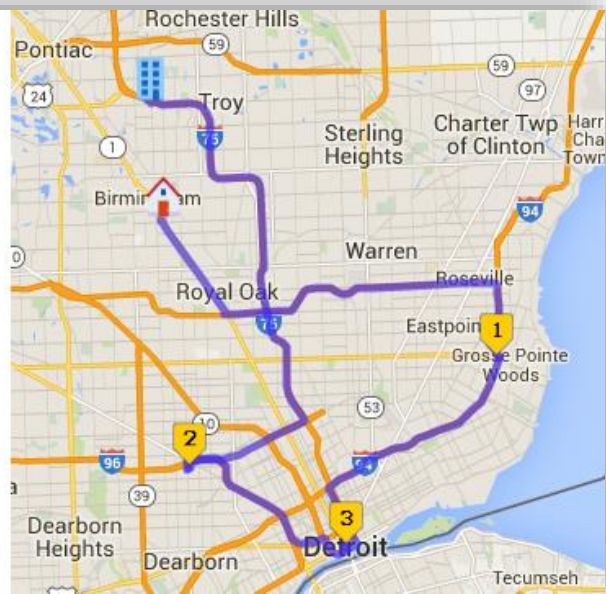
To go to the appointment, simply click on the numbered icon on the map.



Note the different routes when routing by **start time** and **routing distance**.



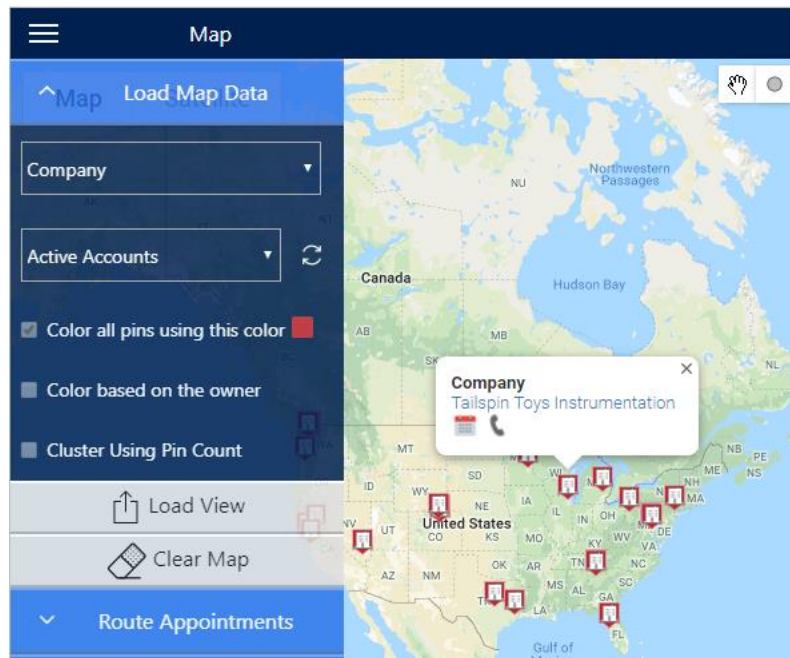
^ Route by start time



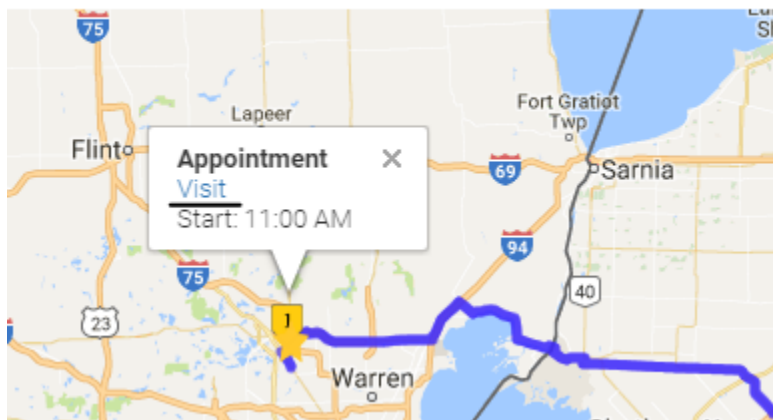
^ Route by distance

Quick Creating Visits/Appointments

When the map is populated, clicking on a Company, Contact, Lead, Opportunity, etc. will bring up information about the selected record as well as a calendar icon.

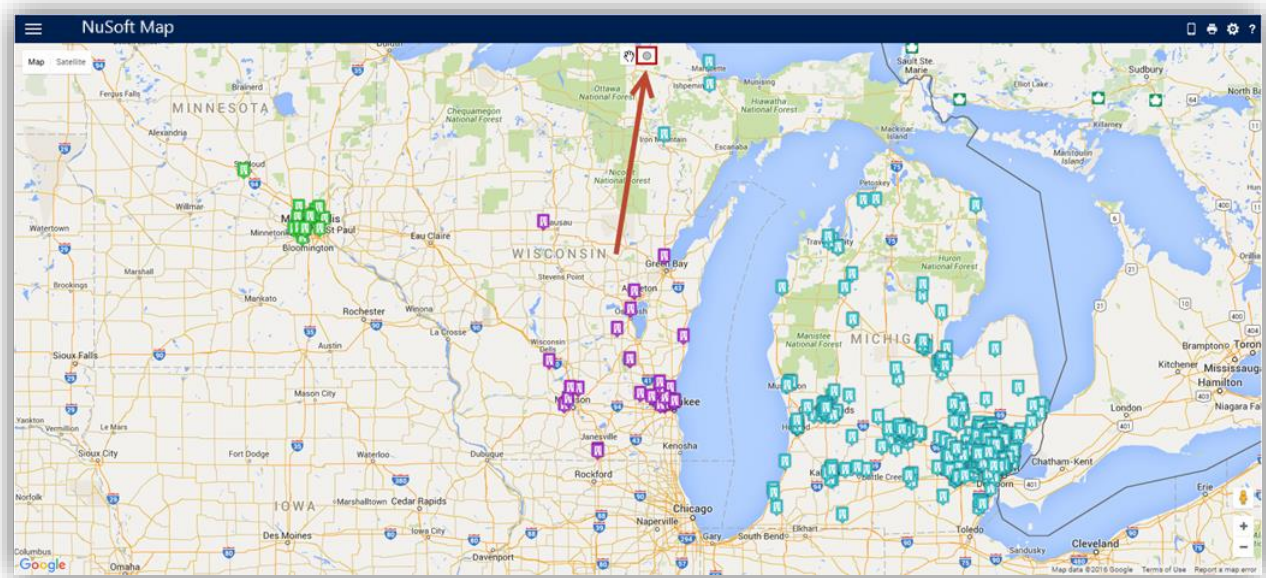


Clicking the icon will open a quick form that allows you to schedule an appointment or a phone call. Click **Save** when the date and time are correct. The appointment will appear on your calendar as “Visit”.

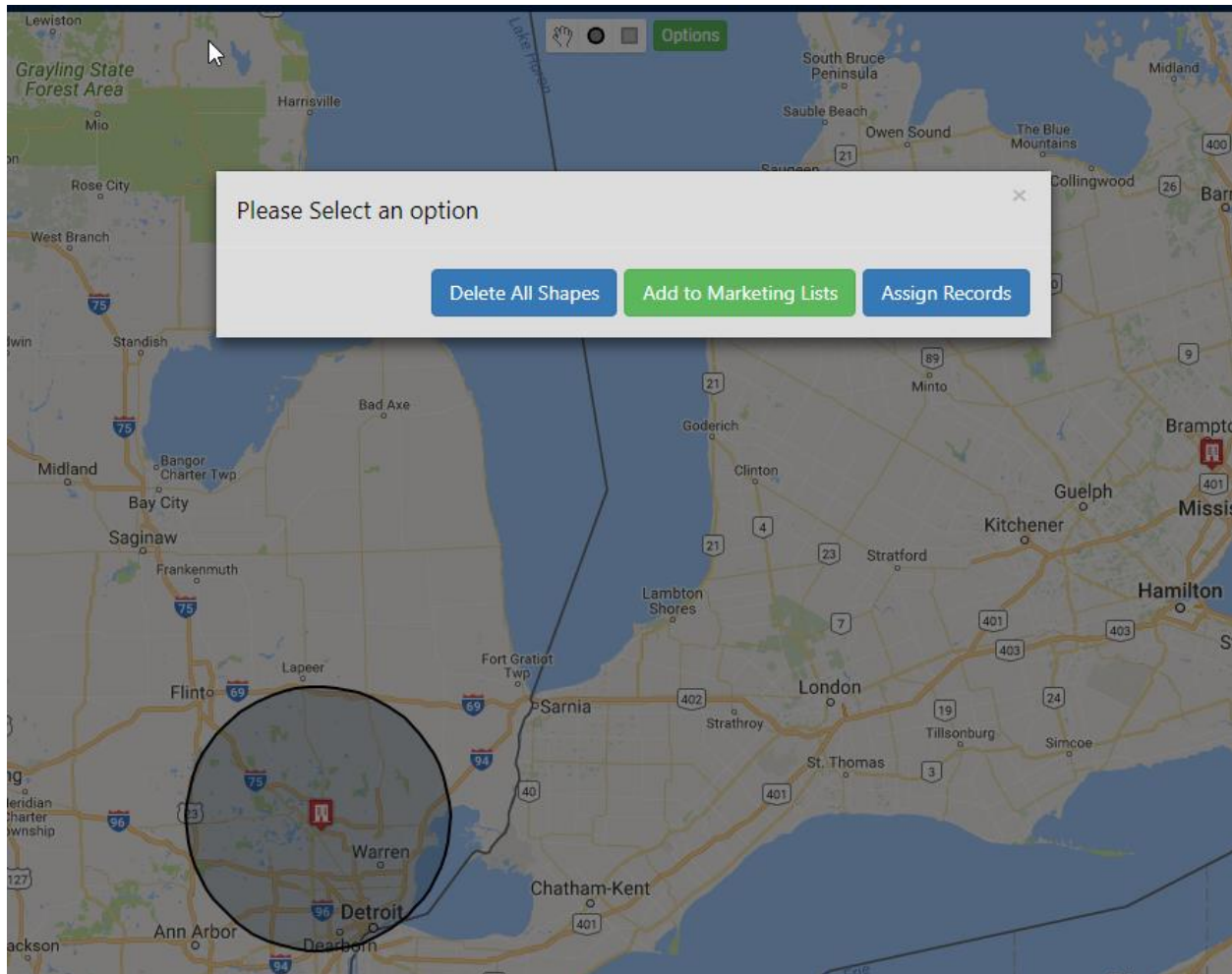


Record Reassignment and Adding to Marketing Lists

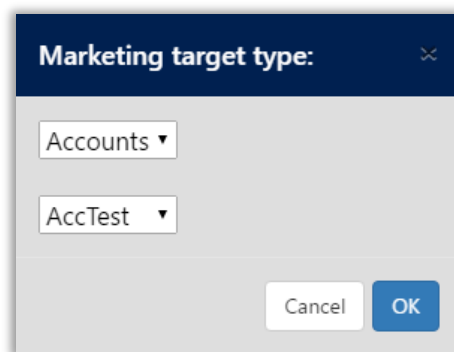
Click on the circle on the controls at the top center of the map. This allows you to encircle records on the map.



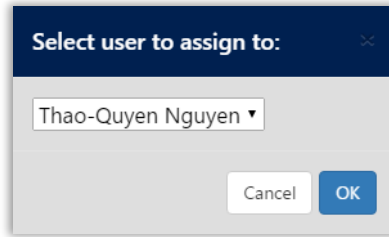
After choosing the records, **click** on the Options button that appears next to the circle draw-control. This will open a menu that lets you either add the selected records to a Marketing List or Assign the records to someone else.



Clicking on **Add to Marketing Lists** will open a prompt that requires you to select a record type and marketing lists.



Clicking on Assign Records will open a list of Active Users on the systems that you can choose to assign the records to.



Support

Please send any product issues or suggestions to support@nusoftsolutions.com.

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