Map

Version 9.0.0.0

Installation and User Guide

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Introduction

This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to install and configure Map solution

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 a region
- Ease of scheduling appointments by simply selecting a pin
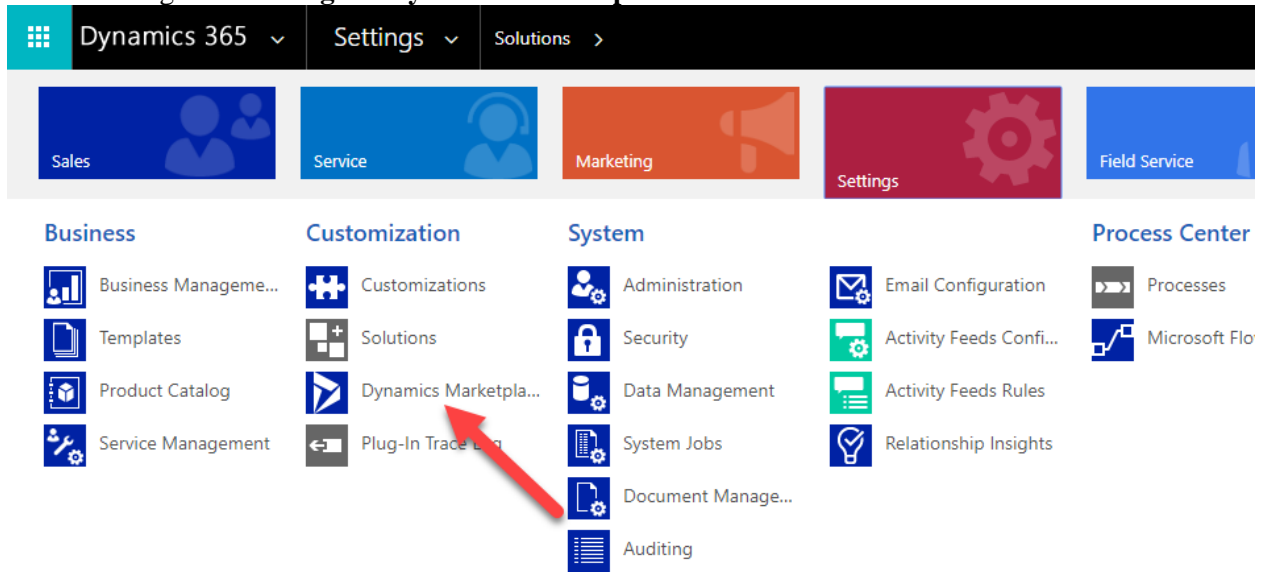
Requirements/Compatibility

The Common solution is required to be imported into D365 for Map to load. Map is compatible with Dynamics 365 version 8.2 and version 9.

The following browsers are supported:

- Internet Explorer 10+
- Google Chrome 43+

Installation

1. Navigate to **Settings -> Dynamics Marketplace**

2. Enter **"NuSoft"** in the search box and click on "**Get it now**" for **Map.**

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NuSoft ✕   Reset filters

App results (20)

Map	CRM for M&A Corporate	Calendar	Last Contact	Alert
By NuSoft Solutions	By NuSoft Solutions	By NuSoft Solutions	By NuSoft Solutions	By NuSoft Solutions
Dynamics 365	Dynamics 365	Dynamics 365	Dynamics 365	Dynamics 365
Data visuallization on a map. A sales dashboard to create a driving route for their appointments.	Manage your projects, project tasks and documents better using Office 365 Groups integration	Displays any entity record in a calendar by month, week, day or they can even be separated by owner.	Last Contact permits to track the last activity with lead, account, contact or opportunity.	Provides users with alerts on any lead, account, contact or opportunity form
				Free
Free trial	Free trial	Free trial	Free trial	Get it now

Alert Pro	Auto Complete	Overcast	RealEstatePro	AXOnePay
By NuSoft Solutions	By NuSoft Solutions	By GSOFT	By Dynamic Netsoft	By Dynamic Netsoft
Dynamics 365	Dynamics 365	Web apps	Dynamics 365	Dynamics 365
Provides users with alerts on any lead, account, contact or opportunity form	Auto Complete uses Bing Maps to generate addresses in a drop-down.	Get clear reports on current costs and recommended savings. It's that simple with Overcast.	The all-in-one comprehensive Management Solution for Property Rental, Leasing and Sales	A comprehensive payroll solution for your organization
Free trial	Free trial	Free trial	Contact me	Contact me

3. Check the box and Click **Continue**

4. Agree to the conditions and click **Agree**

5. Come back to **Settings > Solutions > All Solutions** records page after the installation has completed, **Map** solution file should show up in the records.

Geocode Records

For records to appear on the map, they must be geocoded. This can be done through the configuration page.

1. Go to **Settings->Solutions**.
2. Select the **Map** solution.
3. The configuration page will open. Choose the entity you wish to geocode (might take a couple of minutes to load) and the number of records to geocode. **Note:** To use the Google Maps Geocoding API, you need an API key.
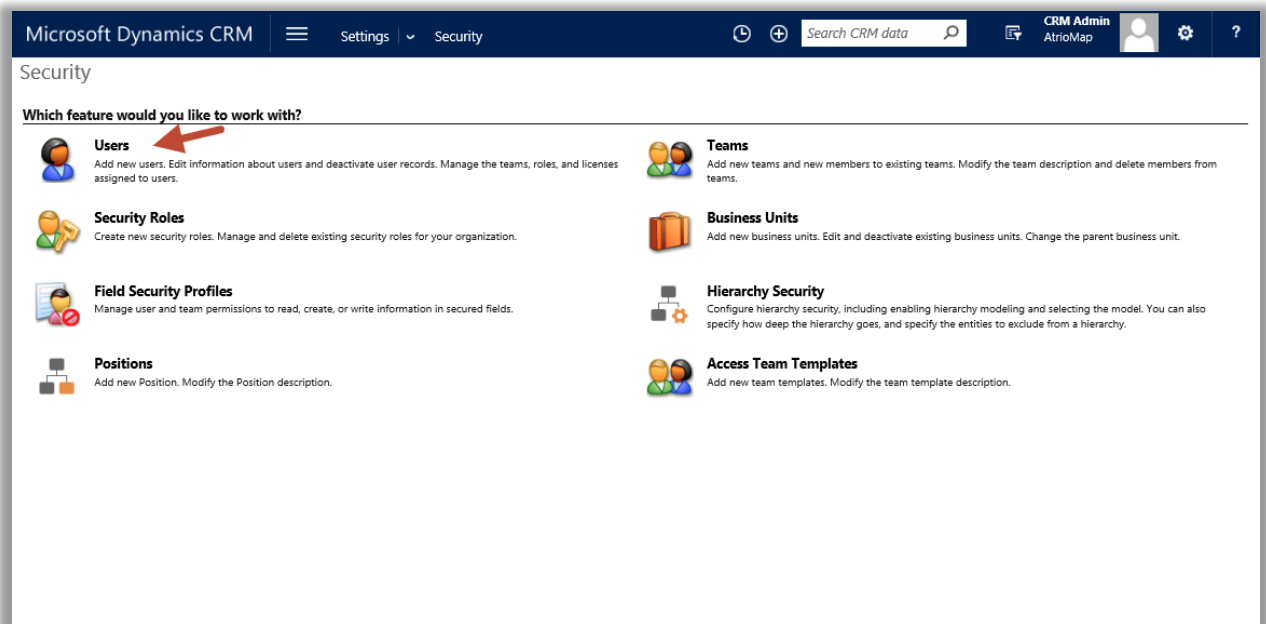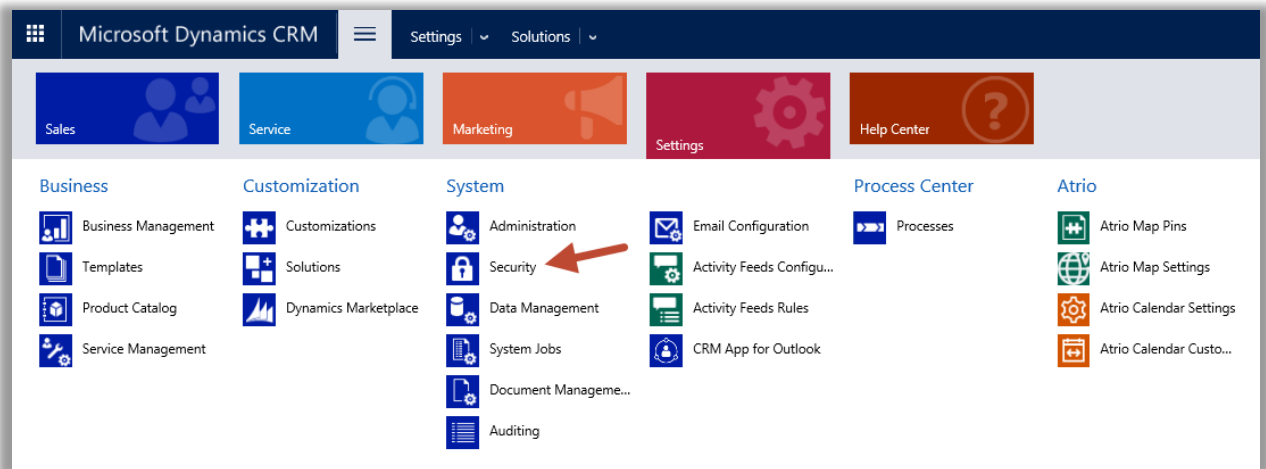

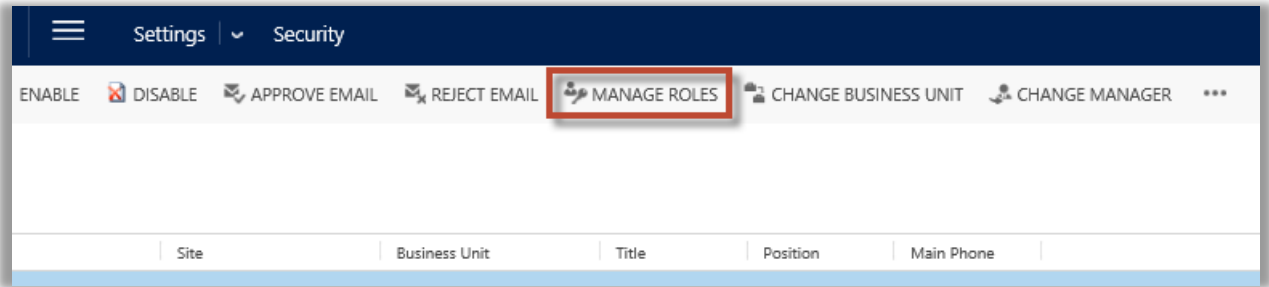4. Select **Confirm Geocode** to start the geocoding process.

Assign User Roles

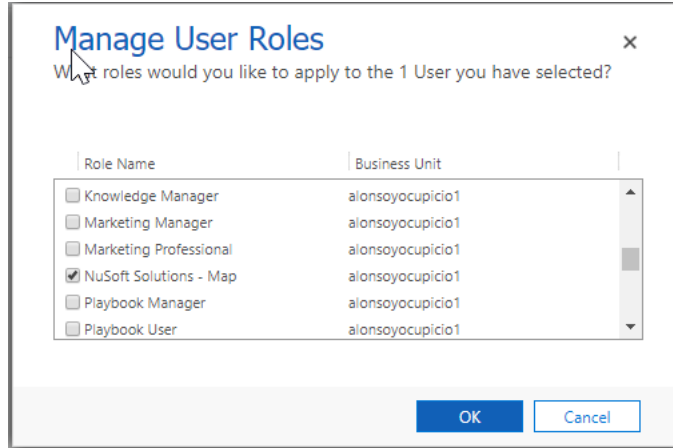Anyone who needs to see Map needs the **NuSoft Solutions – Map** User role.

1. Navigate to **Settings->Security->Users**.

2. Select the users whom you wish to use Map.
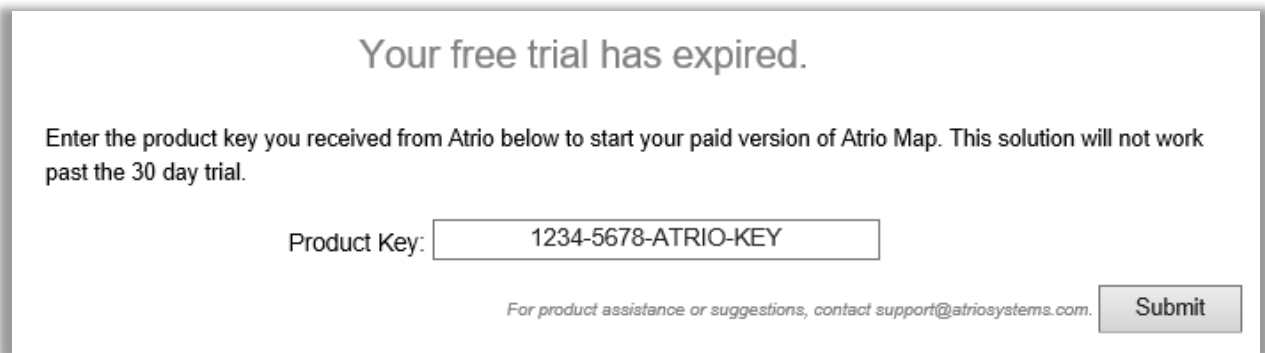3. Select **Manage Roles** in the ribbon.

4. Choose the **NuSoft Solutions – Map** role and select **OK**.

Product Key

After 30 days of use, Map will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open the **Map** solution.
2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from us and click **Submit**. If you do not have a product key, contact at support@nusoftsolutions.com to receive one.

Your free trial has expired.

Enter the product key you received from Atrio below to start your paid version of Atrio Map. This solution will not work past the 30 day trial.

Product Key: 1234-5678-ATRIO-KEY

For product assistance or suggestions, contact support@atriosystems.com. Submit

Google Maps API Key

Map uses Google Maps to display geocoded points over a map. Google Maps APIs are no longer available without API key, so you need to enter a Google Maps API Key following steps in this section.
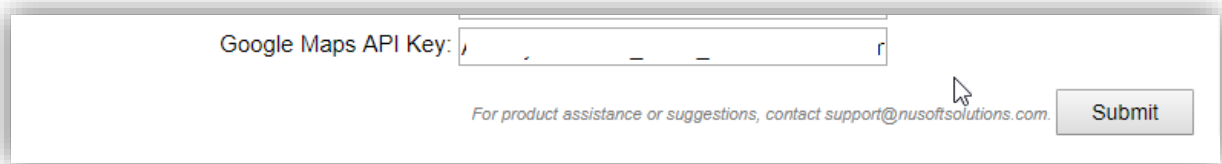
1. Navigate to the **Solutions** page again and open the **Map** solution.
2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the Google Maps API Key. Type it there and click **Submit**. If you do not have a Google Maps Key you can use the Google Cloud Platform Console to manage projects, get API keys, and add API key restrictions.

Support

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

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