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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

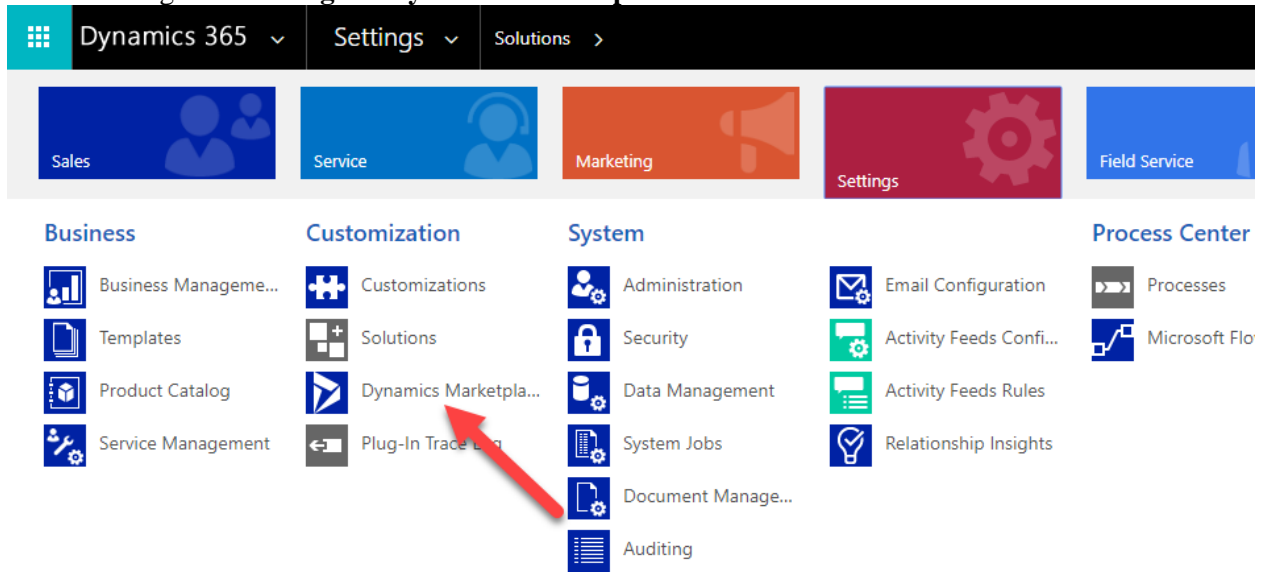
The Common solution is required to be imported into D365 for Map to load. Map is compatible with Dynamics 365 version 8.2 and version 9.

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

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App results (20)

 <p>Map By NuSoft Solutions Dynamics 365</p> <p>Data visualization on a map. A sales dashboard to create a driving route for their appointments.</p> <p>Free trial</p>	 <p>CRM for M&A Corporate By NuSoft Solutions Dynamics 365</p> <p>Manage your projects, project tasks and documents better using Office 365 Groups integration</p> <p>Free trial</p>	 <p>Calendar By NuSoft Solutions Dynamics 365</p> <p>Displays any entity record in a calendar by month, week, day or they can even be separated by owner.</p> <p>Free trial</p>	 <p>Last Contact By NuSoft Solutions Dynamics 365</p> <p>Last Contact permits to track the last activity with lead, account, contact or opportunity.</p> <p>Free trial</p>	 <p>Alert By NuSoft Solutions Dynamics 365</p> <p>Provides users with alerts on any lead, account, contact or opportunity form</p> <p>Free</p> <p>Get it now</p>
 <p>Alert Pro By NuSoft Solutions Dynamics 365</p> <p>Provides users with alerts on any lead, account, contact or opportunity form</p> <p>Free trial</p>	 <p>Auto Complete By NuSoft Solutions Dynamics 365</p> <p>Auto Complete uses Bing Maps to generate addresses in a drop-down.</p> <p>Free trial</p>	 <p>Overcast By GSOF Web apps</p> <p>Get clear reports on current costs and recommended savings. It's that simple with Overcast.</p> <p>Free trial</p>	 <p>RealEstatePro By Dynamic Netsoft Dynamics 365</p> <p>The all-in-one comprehensive Management Solution for Property Rental, Leasing and Sales</p> <p>Contact me</p>	 <p>AXOnePay By Dynamic Netsoft Dynamics 365</p> <p>A comprehensive payroll solution for your organization</p> <p>Contact me</p>

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



One more thing ...



Map
By NuSoft Solutions

- I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).


You're signed in as **Matt Vernier** (mvernier@Nusoftsolutions.com).

Continue

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



Atrio Systems



ATRIO Map

Atrio Map allows users to view data visually 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

Publisher: Atrio Systems

Add the application to Dynamics 365

Select the Dynamics 365 organization you want to add this application to.

Connect to Dynamics 365

Organization to add the application to:

Agree to Microsoft's [Legal Terms](#) and [Privacy Statement](#)

Agree to [Privacy Statement](#) and [Legal Terms](#) for importing solutions into Dynamics 365

Agree Cancel

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

All Solutions ▾

New | Delete | Show Dependencies | Import | Export | Clone a Patch | Clone Solution | Apply Solution Upgrade | Import Translations | Export Translations | Publish

Name	Display Name	Version	Installed On	Package T...	Publisher	Description
AtrioMap	Map	9.0.0.0	6/4/2019	Managed	NuSoft Solutions	9.0 Map settings should allow for at least 12 info...

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.

Solution: Map

Configuration

Map
GeoCoding and Product Key Page

Summary: Map allows users to view data visually on a map, and offers users the functionality to create a driving route for their appointments for a specific date. It displays any entity listed in a custom or system view, and features the ability to reassign records, or schedule appointments directly from the dashboard.

You currently have 29 day(s) left in your free trial.

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

Product Key:

Google Maps API Key:

For entities to appear in the Map, they first need to be geocoded for their latitude and longitude. Select the entity you wish to geocode and click "Confirm" to allow these entities on the map.

Entity to Geocode:

Number of Records to Geocode:

For product assistance or suggestions, contact support@nusoftsolutions.com.

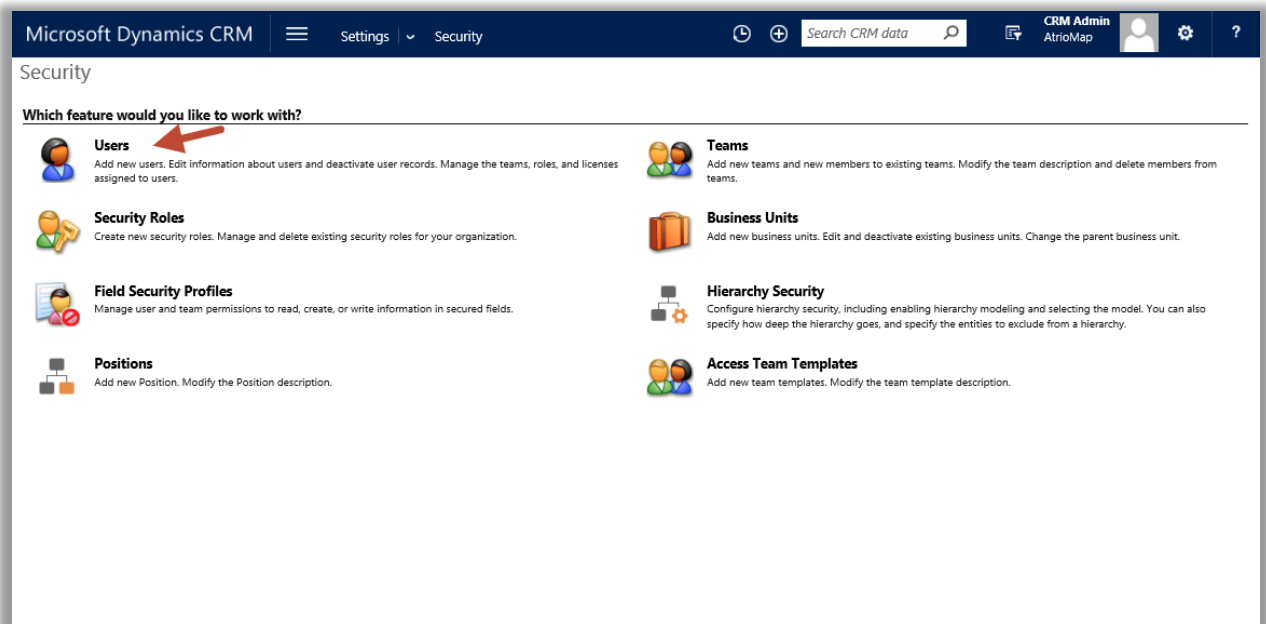
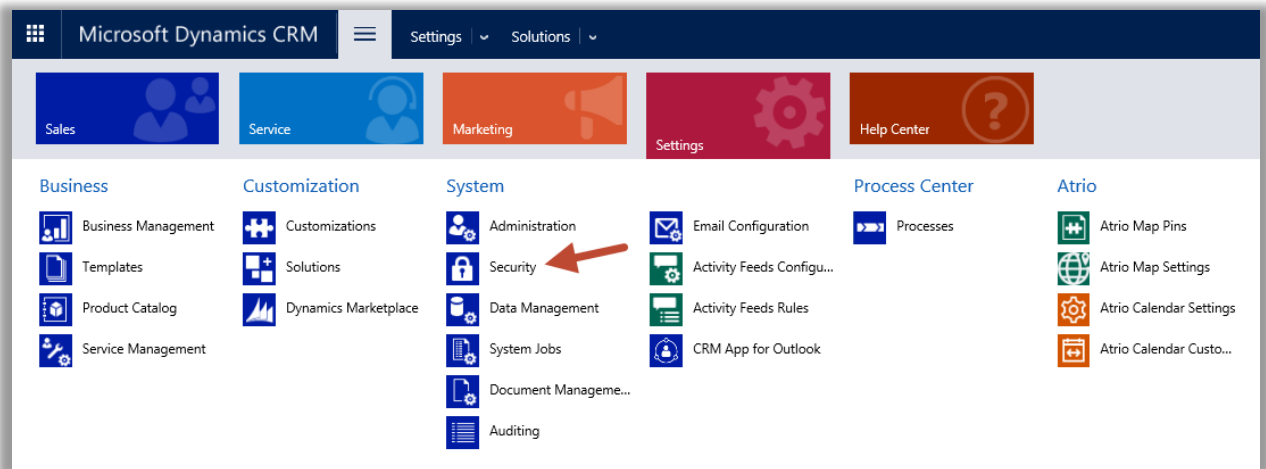
Status: Existing

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

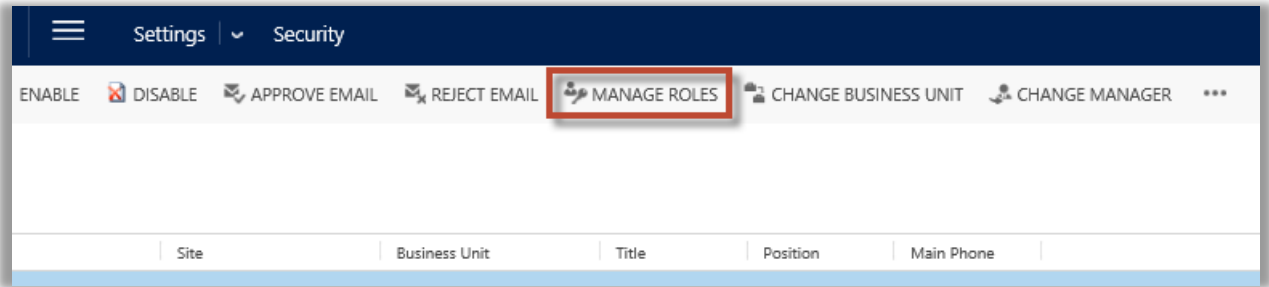
Assign User Roles

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

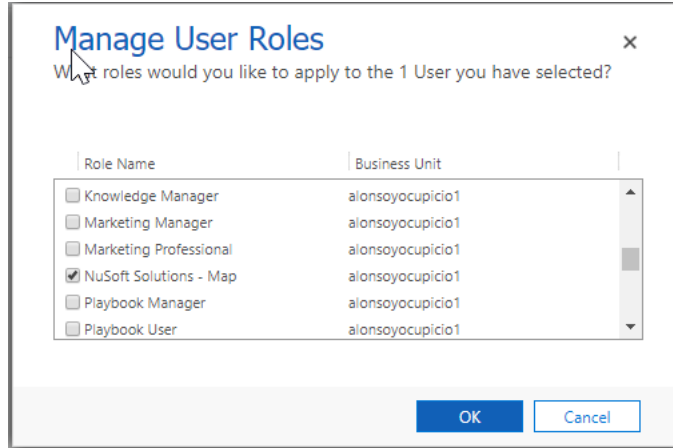
1. Navigate to **Settings->Security->Users**.



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



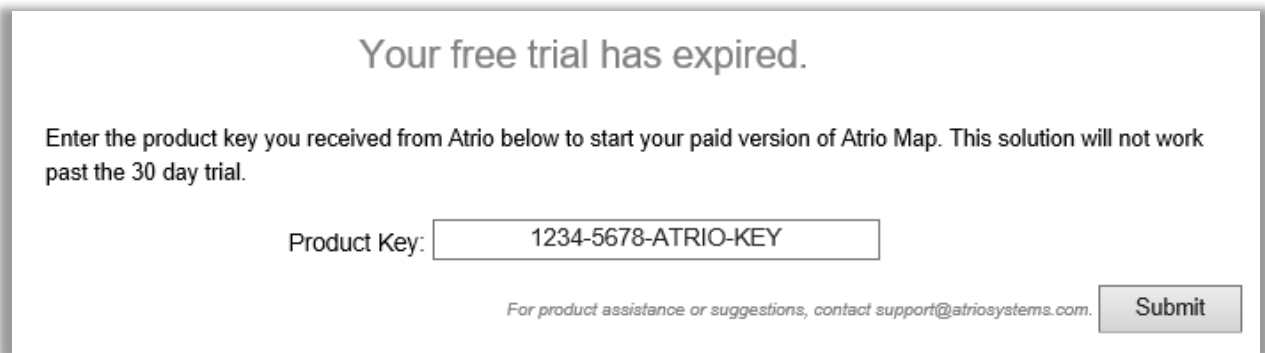
4. Choose the **NuSoft Solutions – Map** role and select **OK**.



Product Key

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

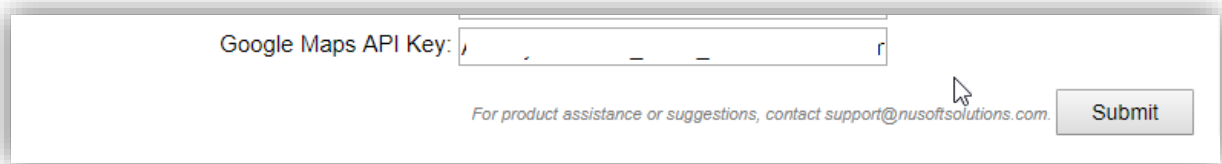
1. Navigate to the **Solutions** page again and open the **Map** solution.
2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from us and click **Submit**. If you do not have a product key, contact at support@nusoftsolutions.com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



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.



The screenshot shows a configuration form for the Google Maps API Key. It features a text input field with the label "Google Maps API Key:" and a "Submit" button. Below the input field, there is a small text link: "For product assistance or suggestions, contact support@nusoftsolutions.com." A mouse cursor is visible over the "Submit" button.

Support

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

Disclaimer

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