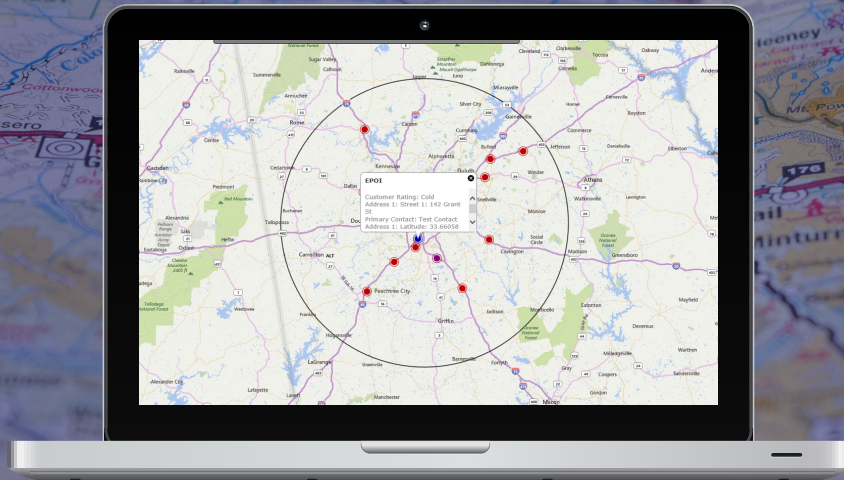


# CRM SMARTMAP DESKTOP

Installation & Configuration Manual





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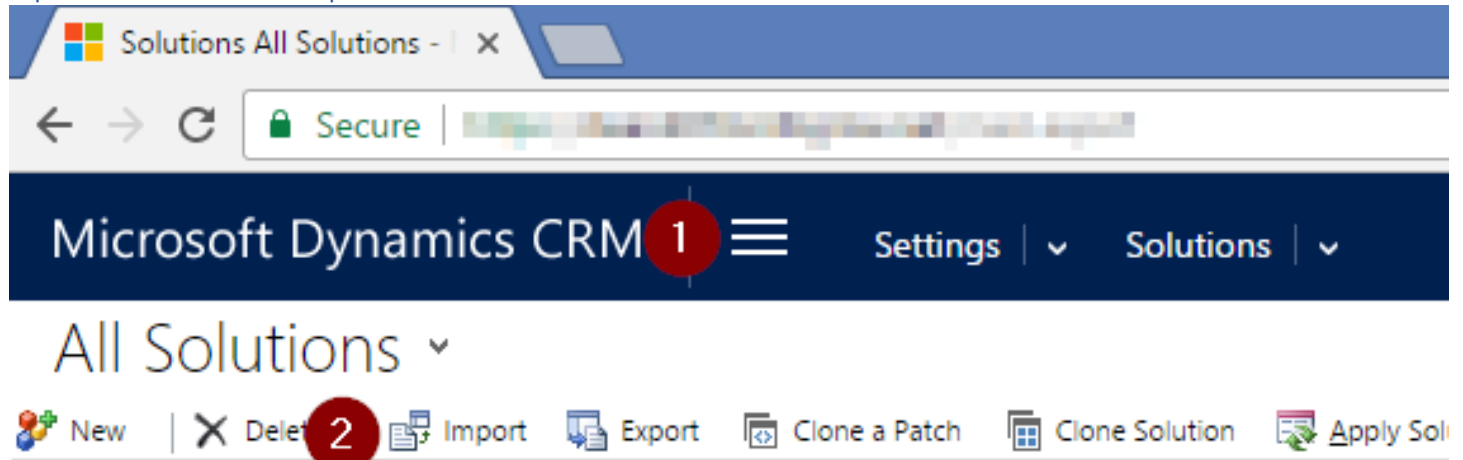
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## Importing the SmartMap Desktop Dynamics 365 Solution

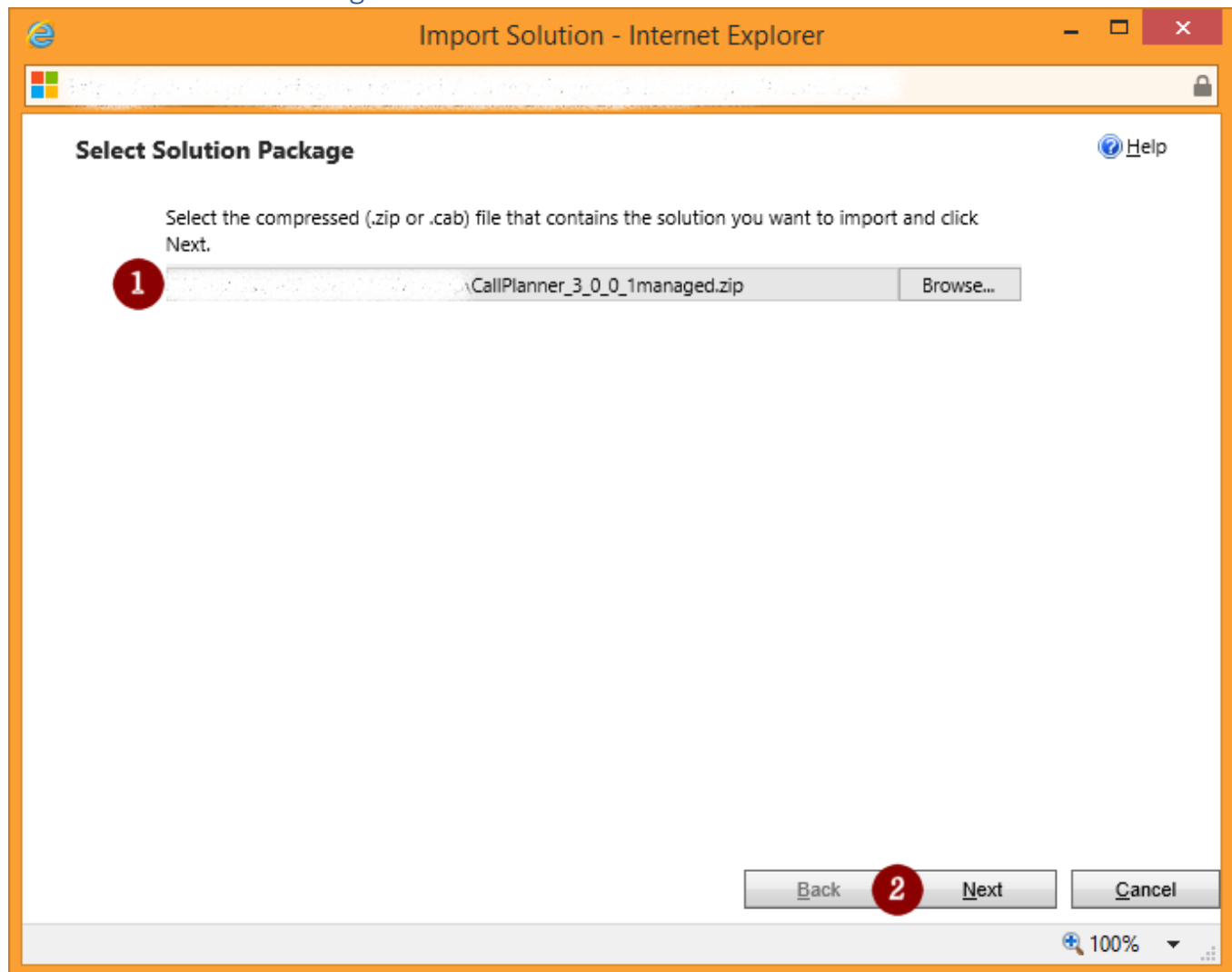
Open the Solution Import Wizard



1. Navigate to **Settings** → **Solutions**.
2. Click the **Import** button.



## Select the Solution Package



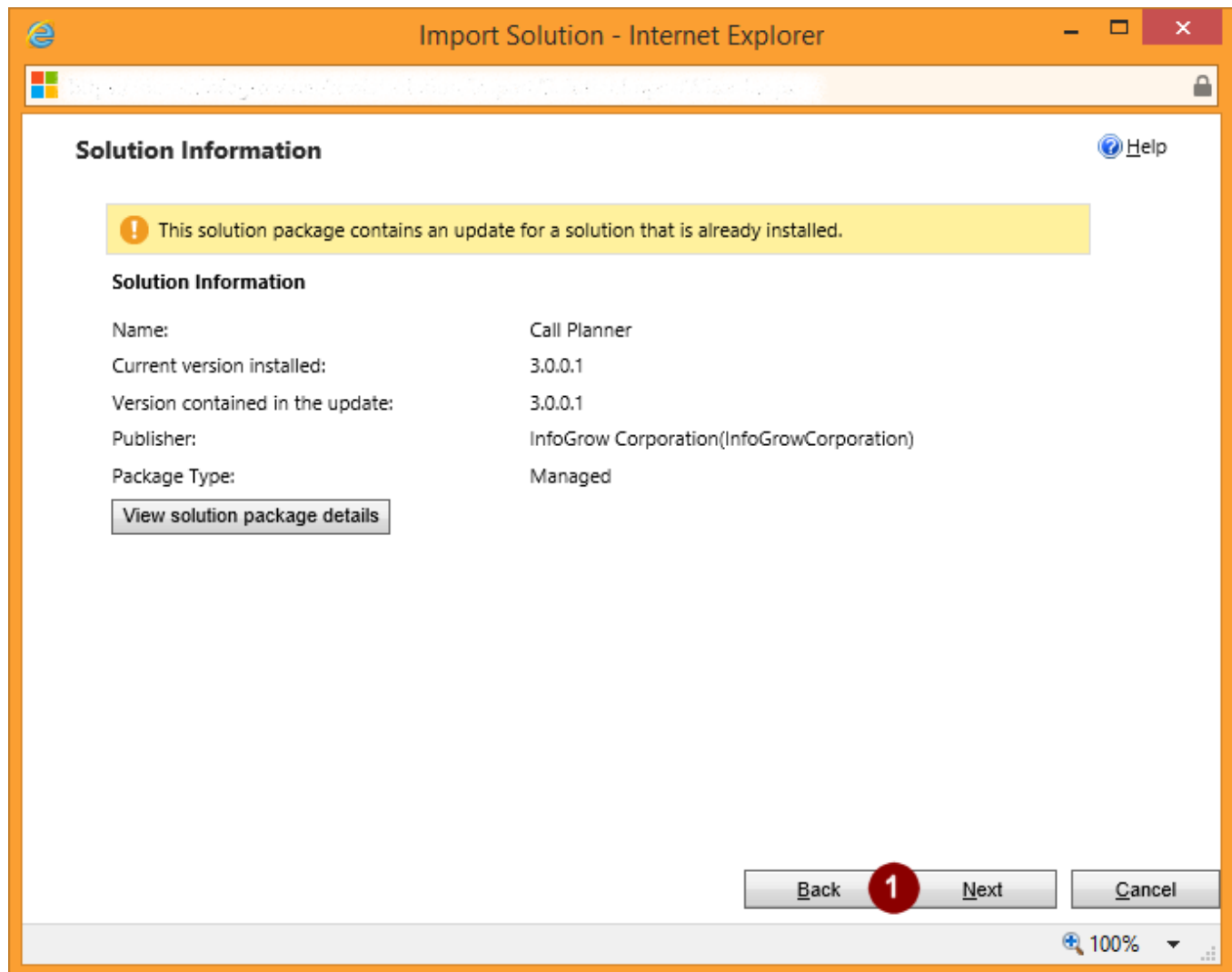
Click

the **Choose File** button and locate the SmartMap Desktop solution to import.

1. Click the **Next** button.



## Review the Solution Information



1. Click the **Next** button.

If you need assistance with any of these steps or  
have questions, please contact us at:

[support@infogrowcorp.com](mailto:support@infogrowcorp.com)



## Set the Import Options

**Import Options** [Help](#)

**!** This solution package contains an update for a solution that is already installed.

**Upgrade Solution Action**

☐ Stage for upgrade

**Previous customizations on components included in this solution**

☒ Maintain customizations (recommended)  
Selecting this option will maintain any unmanaged customizations performed on components but also implies that some of the updates included in this solution will not take effect.

☐ Overwrite customizations  
Selecting this option will overwrite any unmanaged customizations previously performed on components included in this solution. All updates included in this solution will take effect.

**Post Import Actions**

**1** ☒ Enable any SDK message processing steps included in the solution

**NOTE:** New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

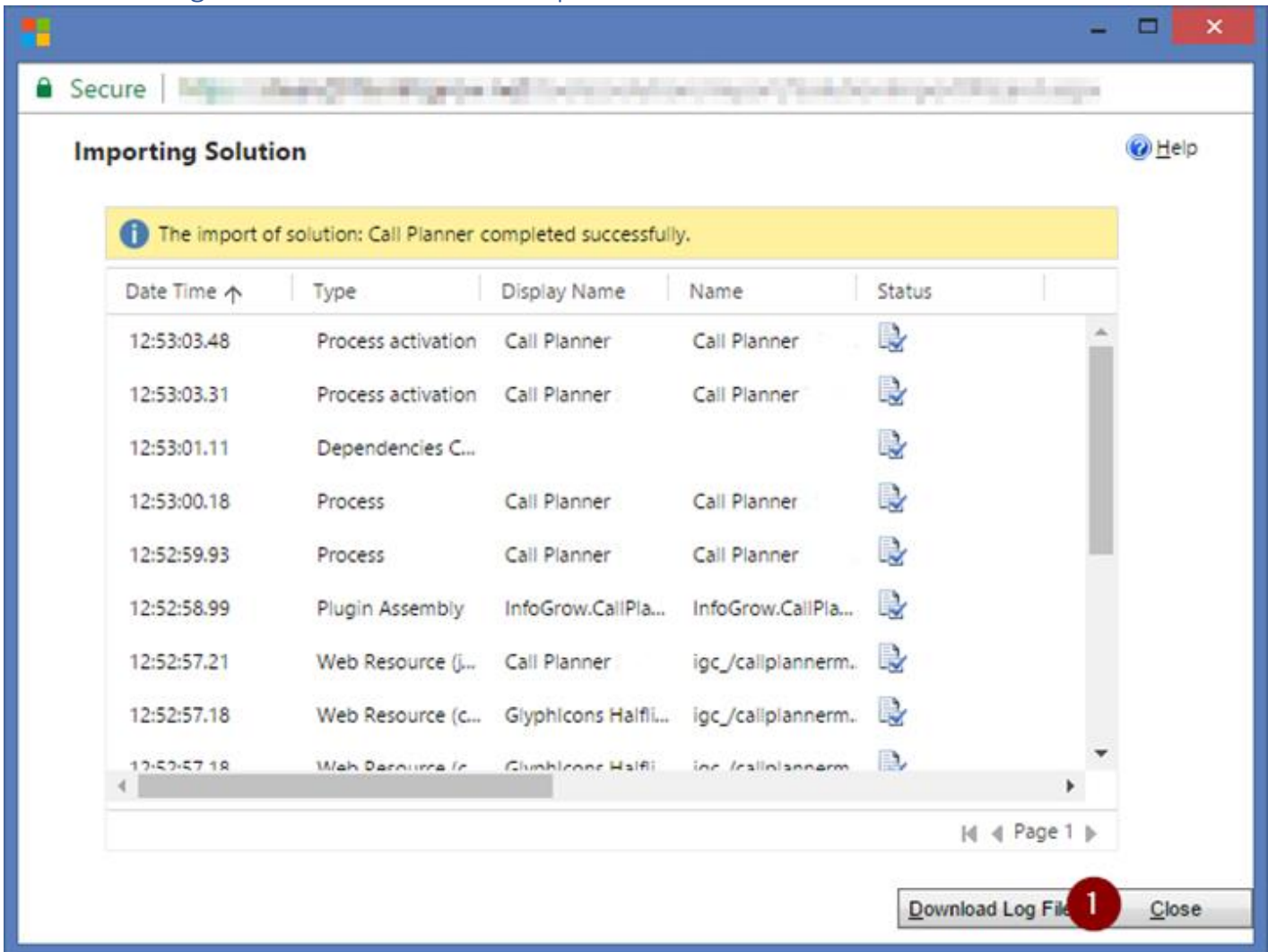
**2**

100%

1. Make sure that the **Enable any SDK message processing steps included in the solution** checkbox is checked.
2. Click the **Import** button.












## Review the Log and Close the Solution Import Wizard



**Importing Solution**

The import of solution: Call Planner completed successfully.

Date Time ↑	Type	Display Name	Name	Status
12:53:03.48	Process activation	Call Planner	Call Planner	
12:53:03.31	Process activation	Call Planner	Call Planner	
12:53:01.11	Dependencies C...			
12:53:00.18	Process	Call Planner	Call Planner	
12:52:59.93	Process	Call Planner	Call Planner	
12:52:58.99	Plugin Assembly	InfoGrow.CallPla...	InfoGrow.CallPla...	
12:52:57.21	Web Resource (j...	Call Planner	igc_/callplannerm..	
12:52:57.18	Web Resource (c...	Glyphicons Halfl...	igc_/callplannerm..	
12:52:57.18	Web Resource (c...	Glyphicons Halfl...	igc_/callplannerm..	

Page 1

[Download Log File](#) **1** [Close](#)

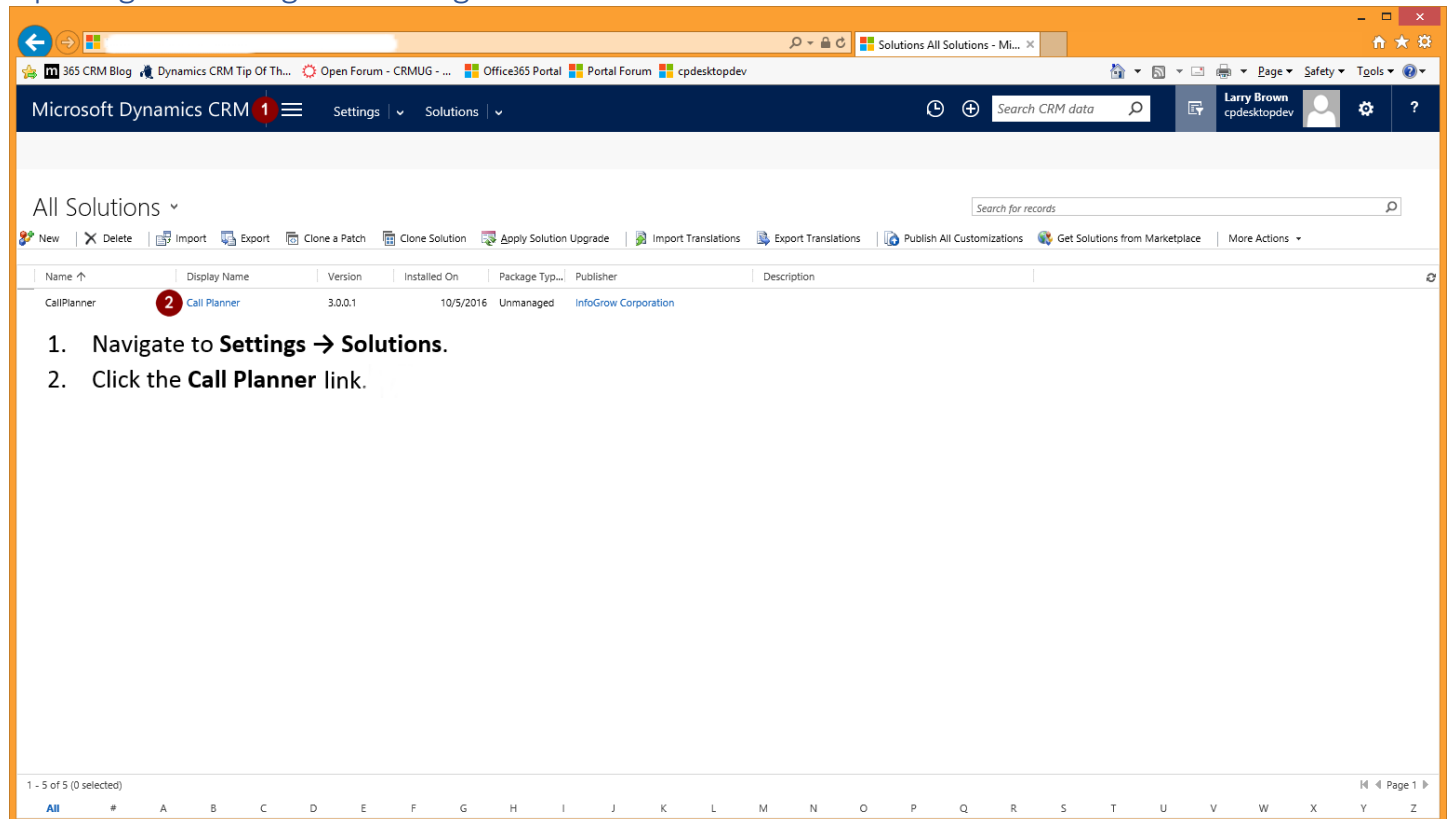
Wait for the solution to finish importing and then click the **Close** button.





## Configuring SmartMap Desktop in Dynamics 365

### Opening the Configuration Page



1. Navigate to **Settings** → **Solutions**.

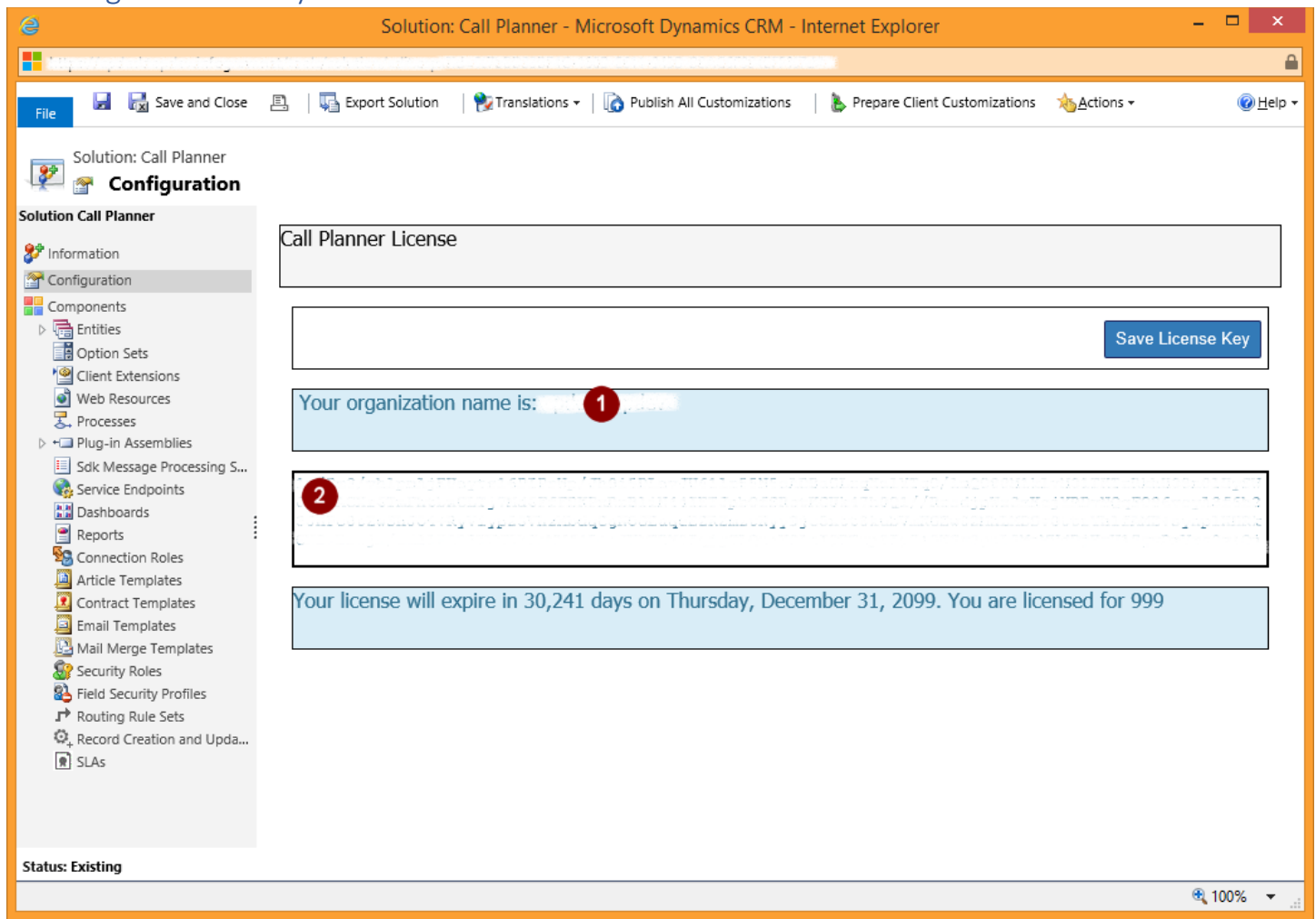
2. Click the **Call Planner** link.

3. Select the Configuration link.





## Entering a License Key



Solution: Call Planner - Microsoft Dynamics CRM - Internet Explorer

File Save and Close Export Solution Translations Publish All Customizations Prepare Client Customizations Actions Help

Solution: Call Planner

**Configuration**

Solution Call Planner

- Information
- Configuration
- Components
  - Entities
  - Option Sets
  - Client Extensions
  - Web Resources
  - Processes
  - Plug-in Assemblies
  - Sdk Message Processing S...
  - Service Endpoints
  - Dashboards
  - Reports
  - Connection Roles
  - Article Templates
  - Contract Templates
  - Email Templates
  - Mail Merge Templates
  - Security Roles
  - Field Security Profiles
  - Routing Rule Sets
  - Record Creation and Upda...
  - SLAs

Call Planner License

Save License Key

Your organization name is: 1

2

Your license will expire in 30,241 days on Thursday, December 31, 2099. You are licensed for 999

Status: Existing

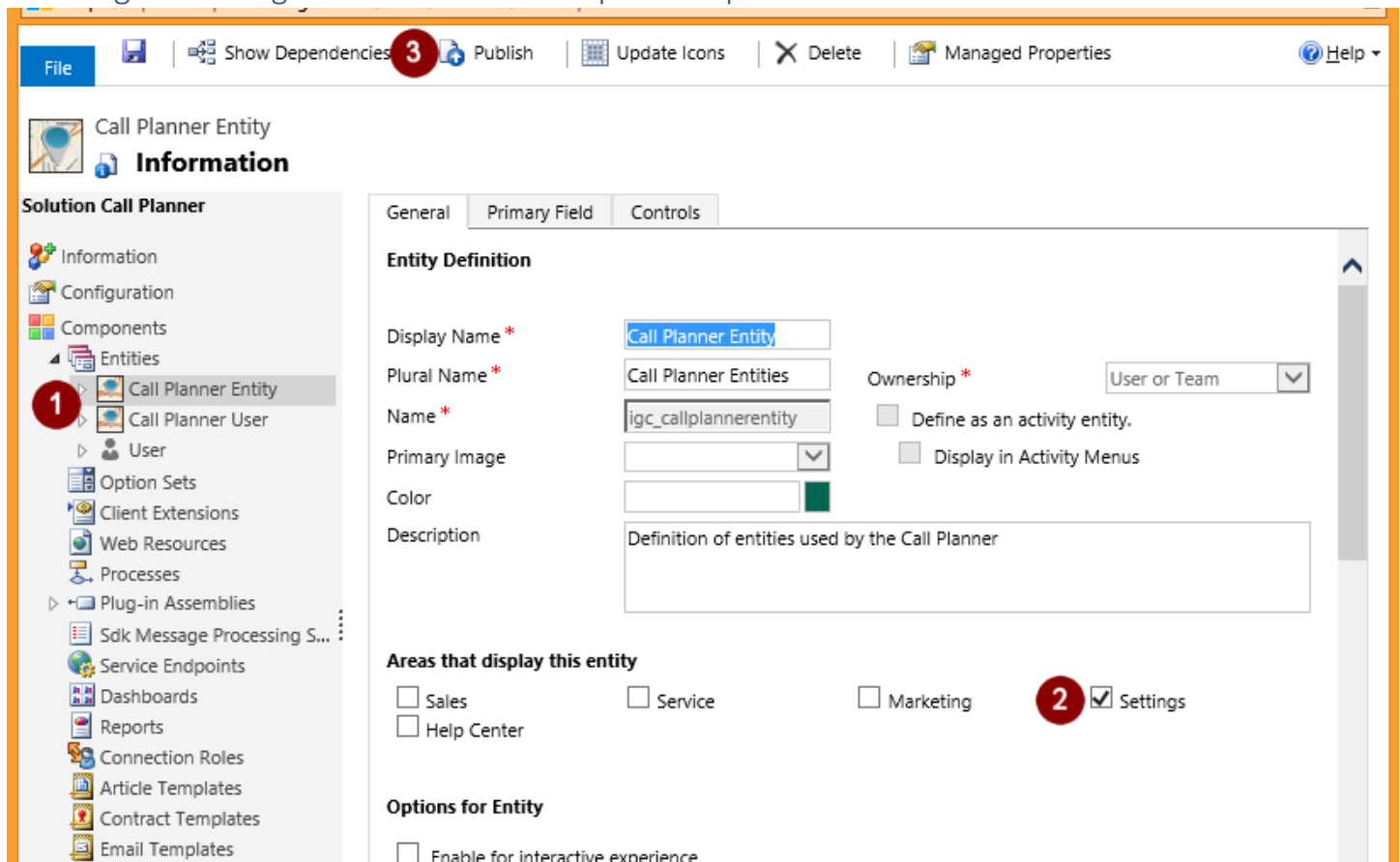
100%

Your license information is available in the **License Key** section of the configuration.

1. Contact InfoGrow Corporation at [support@infogrowcorporation.com](mailto:support@infogrowcorporation.com) for a license key.  
**Be sure to provide us with your unique organization name and the product you are wishing to license.**
2. Once you receive your license key copy and paste it into the **License Key** text box and click Save License Key.



## Enabling the Configuration and SmartMap Desktop User Entities



The screenshot shows the 'Call Planner Entity' configuration window. The left sidebar lists various system components, with 'Entities' expanded and 'Call Planner Entity' selected (marked with a red circle 1). The main panel has tabs for 'General', 'Primary Field', and 'Controls'. The 'General' tab is active, showing the 'Entity Definition' section. Fields include 'Display Name' (Call Planner Entity), 'Plural Name' (Call Planner Entities), 'Name' (lgc\_callplannerentity), 'Ownership' (User or Team), 'Primary Image', 'Color', and 'Description' (Definition of entities used by the Call Planner). Below this is the 'Areas that display this entity' section, where the 'Settings' checkbox is checked (marked with a red circle 2). The 'Options for Entity' section has an unchecked 'Enable for interactive experience' checkbox. A red circle 3 highlights the 'Publish' button in the top toolbar.

1. Browse to Settings→Customize the system and do the following steps for both the SmartMap Desktop Entity and SmartMap Desktop User.
2. In the “Areas that display this entity” check the Settings box.
3. Publish your changes for both entities.
4. Close the Customization dialog box and refresh your browser by typing F5.
5. Both Entities will be available to configure under Settings→Extensions.

## Configuring Entities

To make entities available in the SmartMap Desktop application they need to be added to the SmartMap Desktop Entities entity in Settings→Extensions. Note, only entities that can be geocoded (have address information) should be added to this group. To add select the new button and fill in the following:

1. Name – Name of the entity, friendly name that users will recognize.
2. Owner – filled in by default with user creating the configuration.



3. Friendly Entity Name – Required, name that will appear to the users in the application.
4. Entity Schema Name – Required, use schema name, case sensitive. Used for querying in the application.

Microsoft Dynamics CRM

NEW DEACTIVATE DELETE AS

File Publish All Customizations

CALL PLANNER ENTITY : INFORMATION

### Account Config

**General**

Name	Account Config
Owner*	
Friendly Entity Name*	Accounts
Entity Schema Name*	Account
Search Attribute*	Name
Latitude*	Address1_Latitude
Longitude*	Address1_Longitude
Rollover One	Address1_Line1
Rollover Two	PrimaryContactId
Rollover Three	new_type
Rollover Four	WebSiteURL
Rollover Five	--
Rollover Six	--

**Solution Default Solution**

- Components
  - Entities
    - Account
      - Forms
      - Views
      - Charts
      - Fields
      - Keys
      - 1:N Relationships
      - N:1 Relationships
      - N:N Relationships
      - Messages
      - Business Rules
      - Hierarchy Settings
      - Dashboards
      - Activity

**View: All**

Name	Schema Name
address1_fax	Address1_Fax
address1_freighttermscode	Address1_FreightTermsCode
address1_latitude	Address1_Latitude
address1_line1	Address1_Line1
address1_line2	Address1_Line2
address1_line3	Address1_Line3
address1_longitude	Address1_Longitude
address1_name	Address1_Name

- 5.
6. Search Attribute – Required, use schema name, case sensitive. Used by the application as the default search type.
7. Latitude - Required, use schema name, case sensitive.
8. Longitude - Required, use schema name, case sensitive.
9. Minimum Radius – Required, will be the smallest radius value available for users to search.
10. Maximum Radius - Required, will be the largest radius value available for users to search.
11. Default Radius - Required, will be the selected radius value available for users when searching.
12. Rollover One – Required, use schema name, case sensitive. This will be the information that appears when the users tap an icon on the map.
13. Rollover Two – Six – not required, use schema name, case sensitive.

Below is an example of a configuration of the Account entity. Note your fields may differ.

CALL PLANNER ENTITY : INFORMATION

### New Call Planner Entity

**Call Planner Entity**

Friendly Entity Name*	Accounts	Schema Name*	Account
Latitude Field*	Address1_Latitude	Longitude Field*	Address1_Longitude
Search Attribute*	Name		
Minimum Radius*	.25	Maximum Radius*	50
Default Radius*	40		

**Rollover Fields**

Rollover One Schema	Telephone1
Rollover Two Schema	Address1_Line1
Rollover Three Schema	PrimaryContactId
Rollover Four Schema	new_CustomerRating
Rollover Five Schema	WebSiteURL
Rollover Six	Fax



## Adding SmartMap Desktop Users

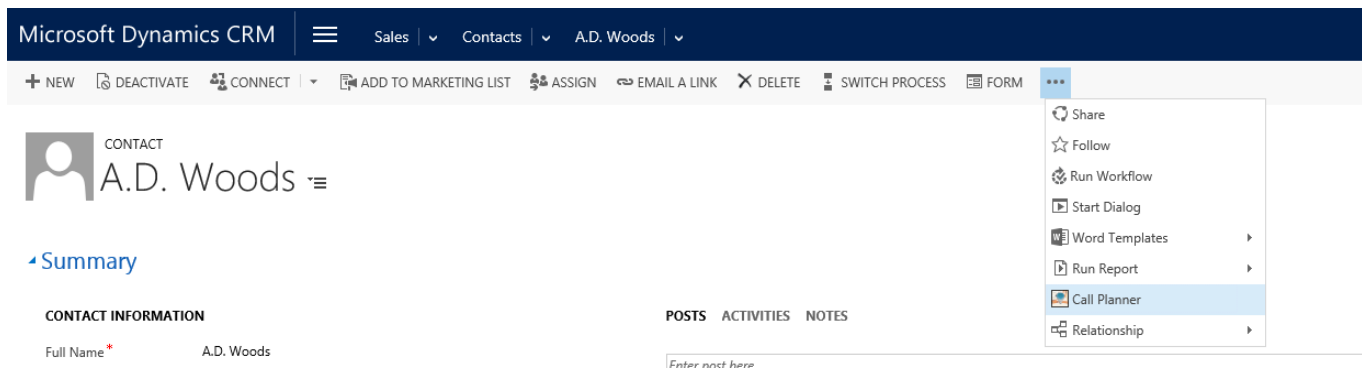
To enable users to use the SmartMap Desktop Application do the following:

- 1) Navigate to Settings→Extensions→SmartMap Desktop Users
- 2) Add each user as a new record.
- 3) Each new user will also need to be given the SmartMap Desktop security role.

## Adding SmartMap Desktop Buttons

Three buttons are available in the download. These provide a way for users to open the SmartMap Desktop from either the Contact, Account or Lead ribbon bar. Either one or all of the buttons can be installed depending on the organizations preferences. To install the solutions, do the following:

- 1) Navigate to Settings→Solutions
- 2) Import then publish the button solutions that are needed.
- 3) Refresh the browser for the buttons to appear on the imported entity.



## Product Support

The organization's CRM Administrator is entitled to unlimited email support through [support@InfoGrowCorp.com](mailto:support@InfoGrowCorp.com).

Maintaining the CRM Administrator's contact information, including an email address, with InfoGrow will make it possible for us to share product update information, usage tips, and end user training videos.

330-929-1353

[www.infogrowcorp.com](http://www.infogrowcorp.com)

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