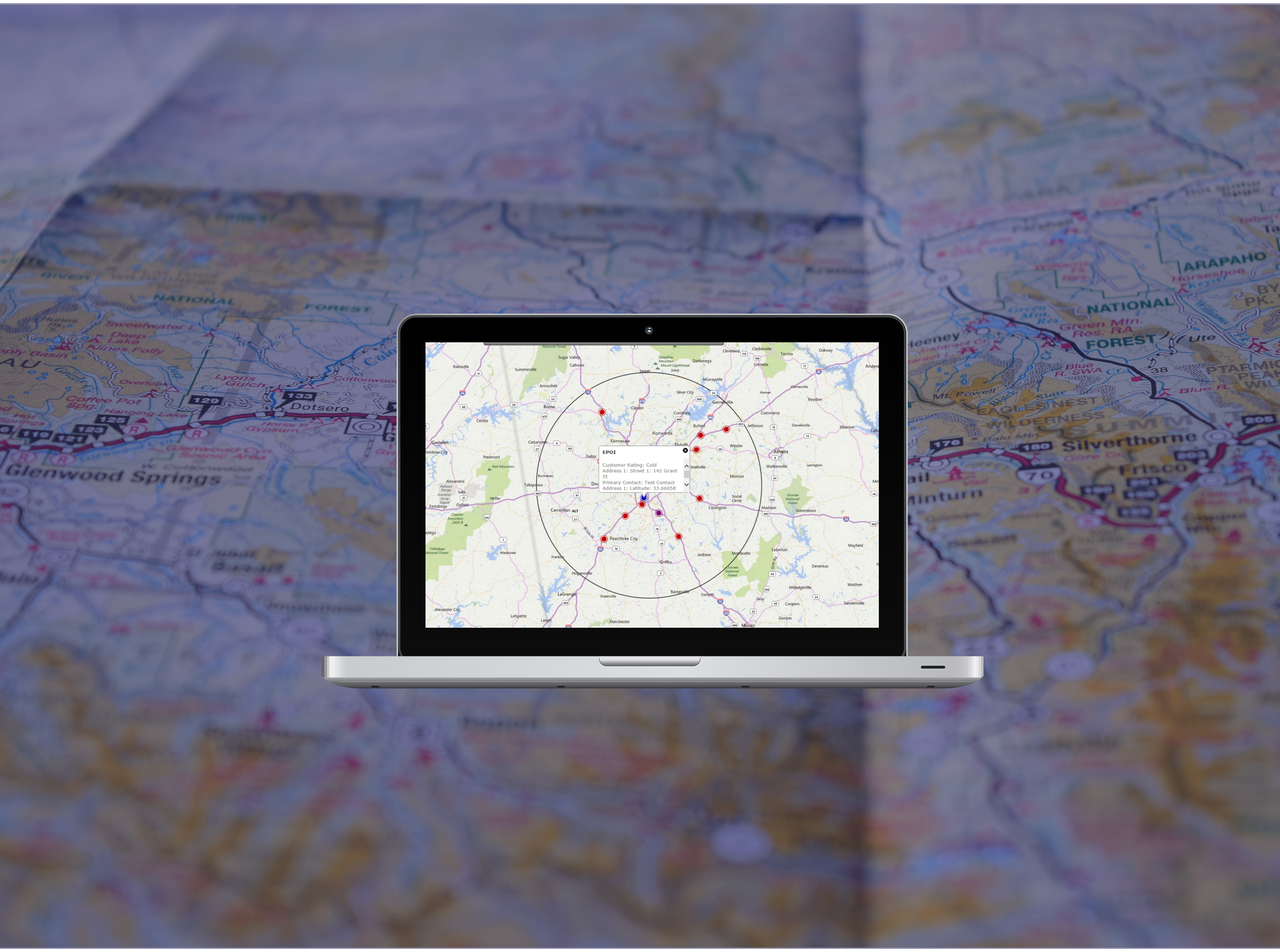
CRM SmartMap

CRM SMARTMAP DESKTOP

Installation & Configuration Manual



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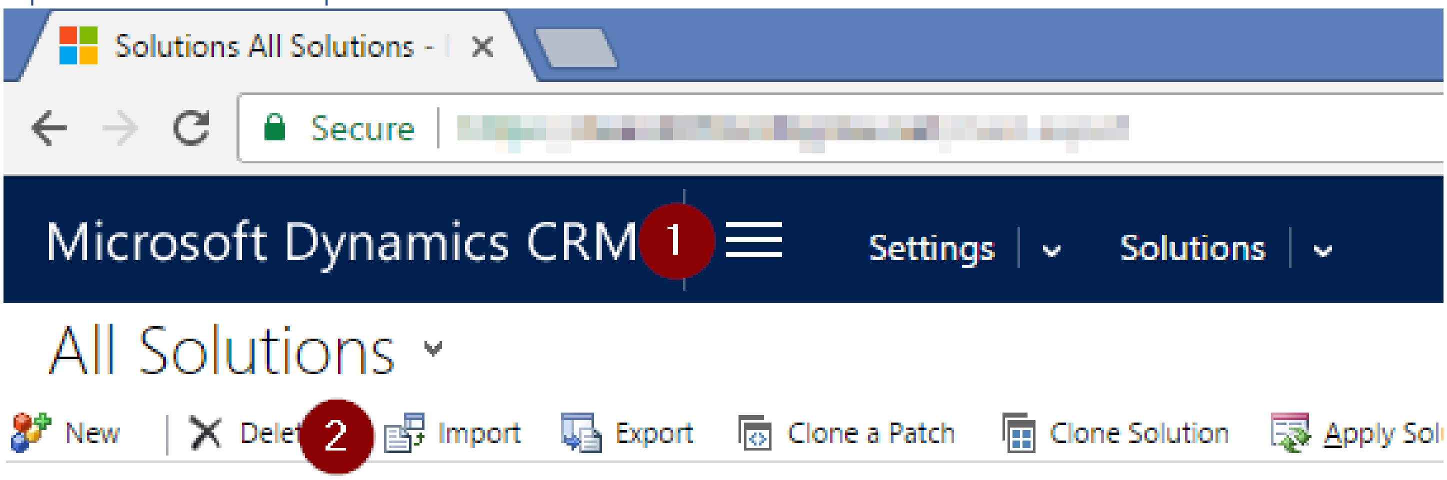
Importing the SmartMap Desktop Dynamics 365 Solution

Open the Solution Import Wizard



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

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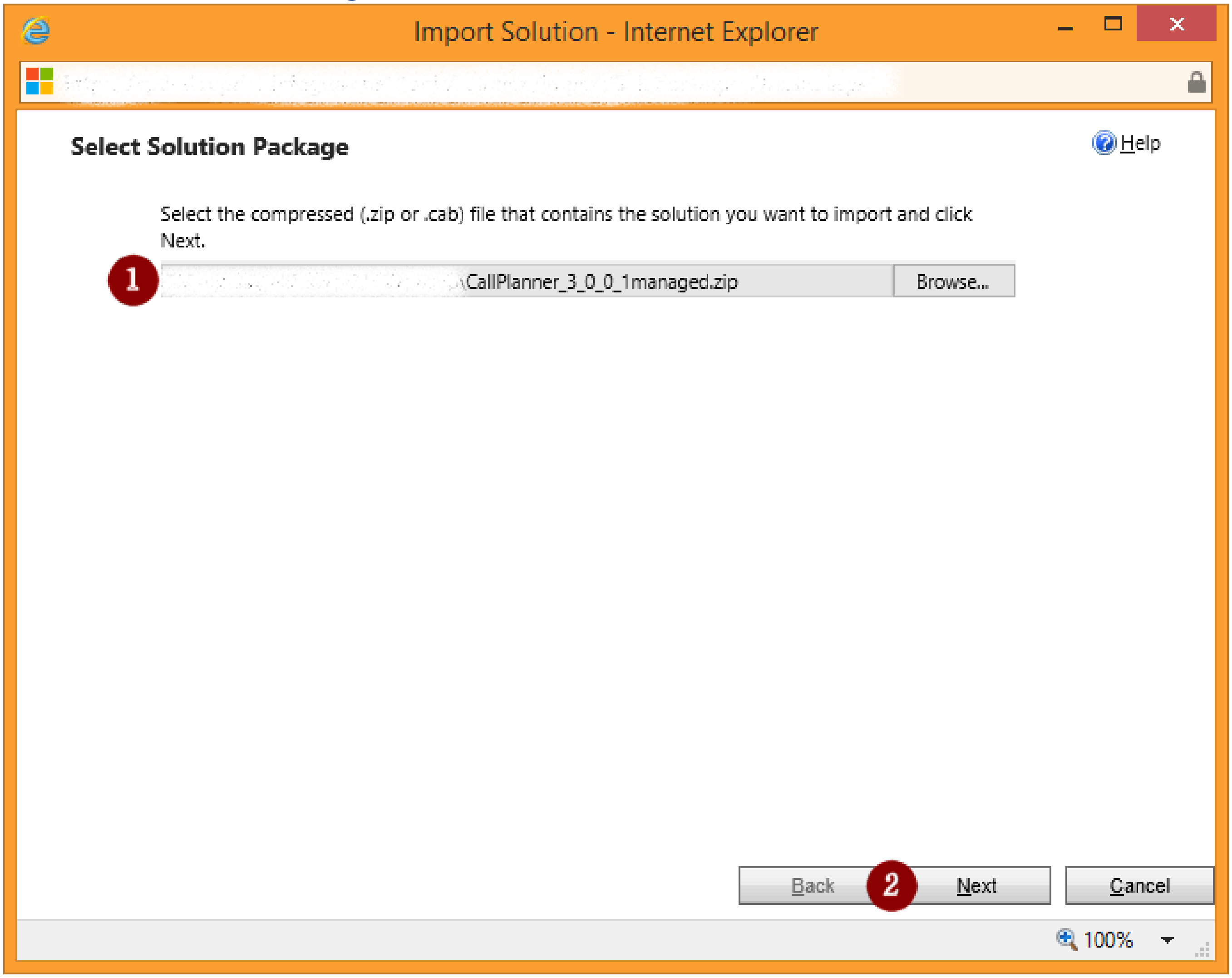
Select the Solution Package



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

1. Click the **Next** button.

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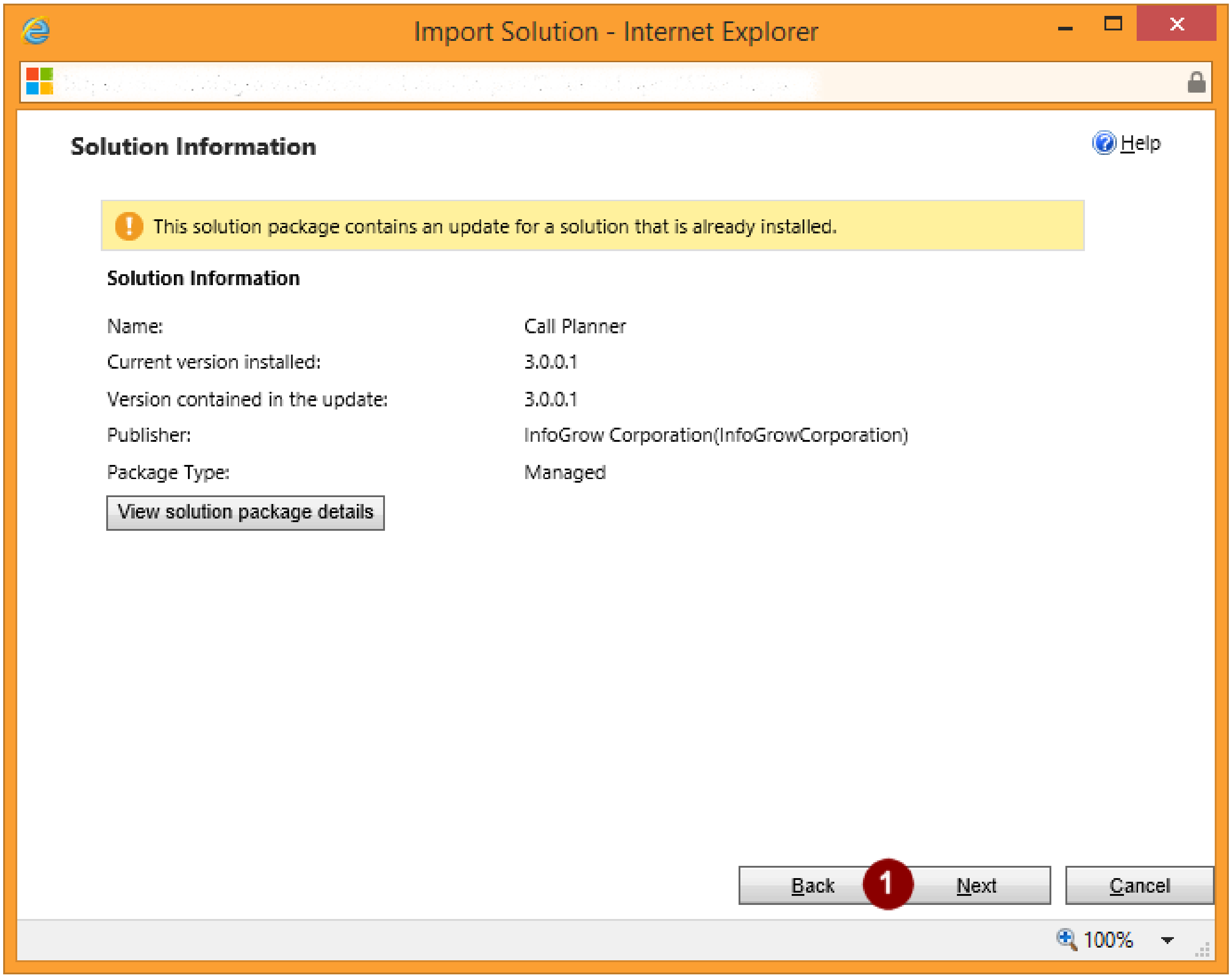
Review the Solution Information



1. Click the **Next** button.

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

support@infogrowcorp.com

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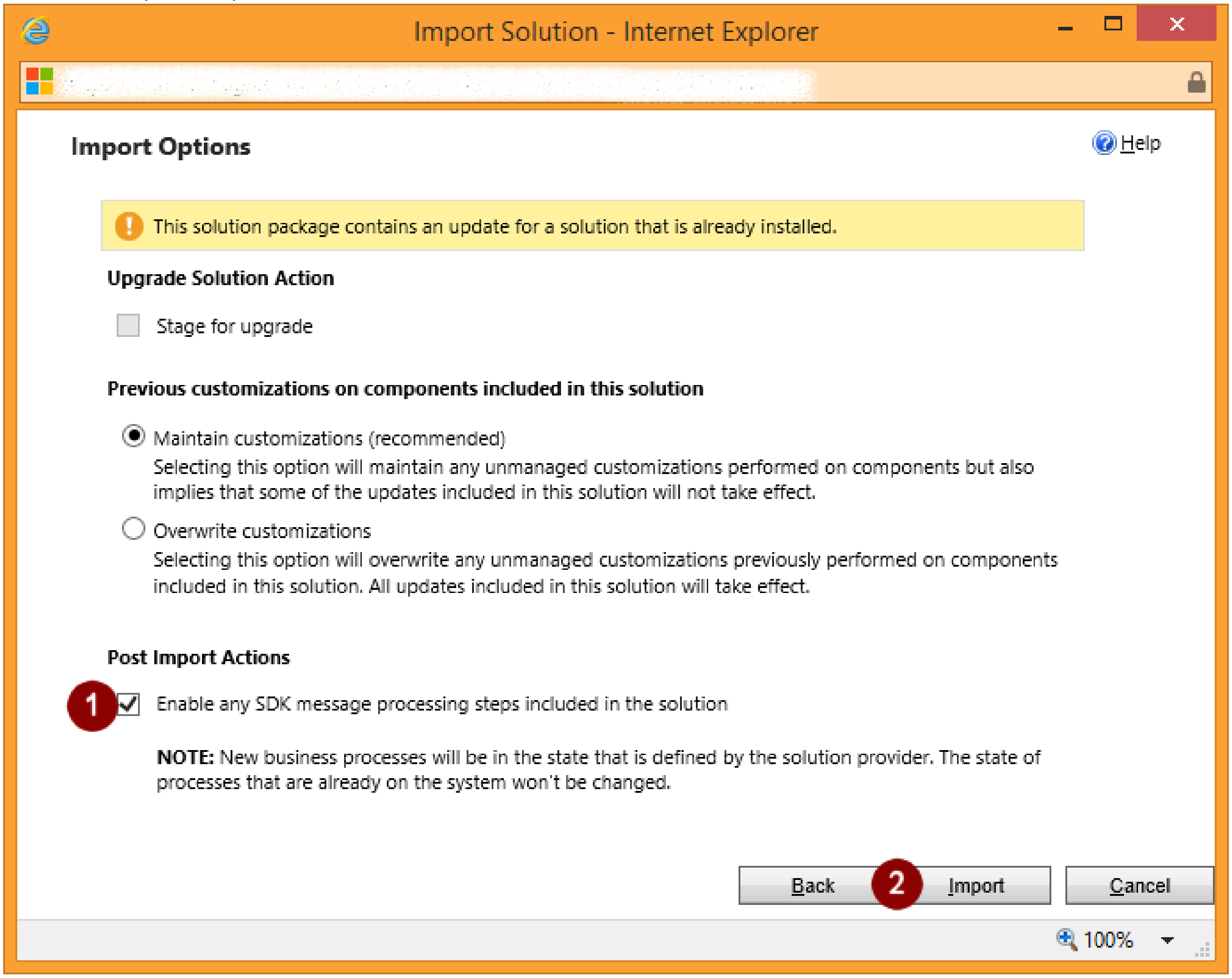
Set the Import Options



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

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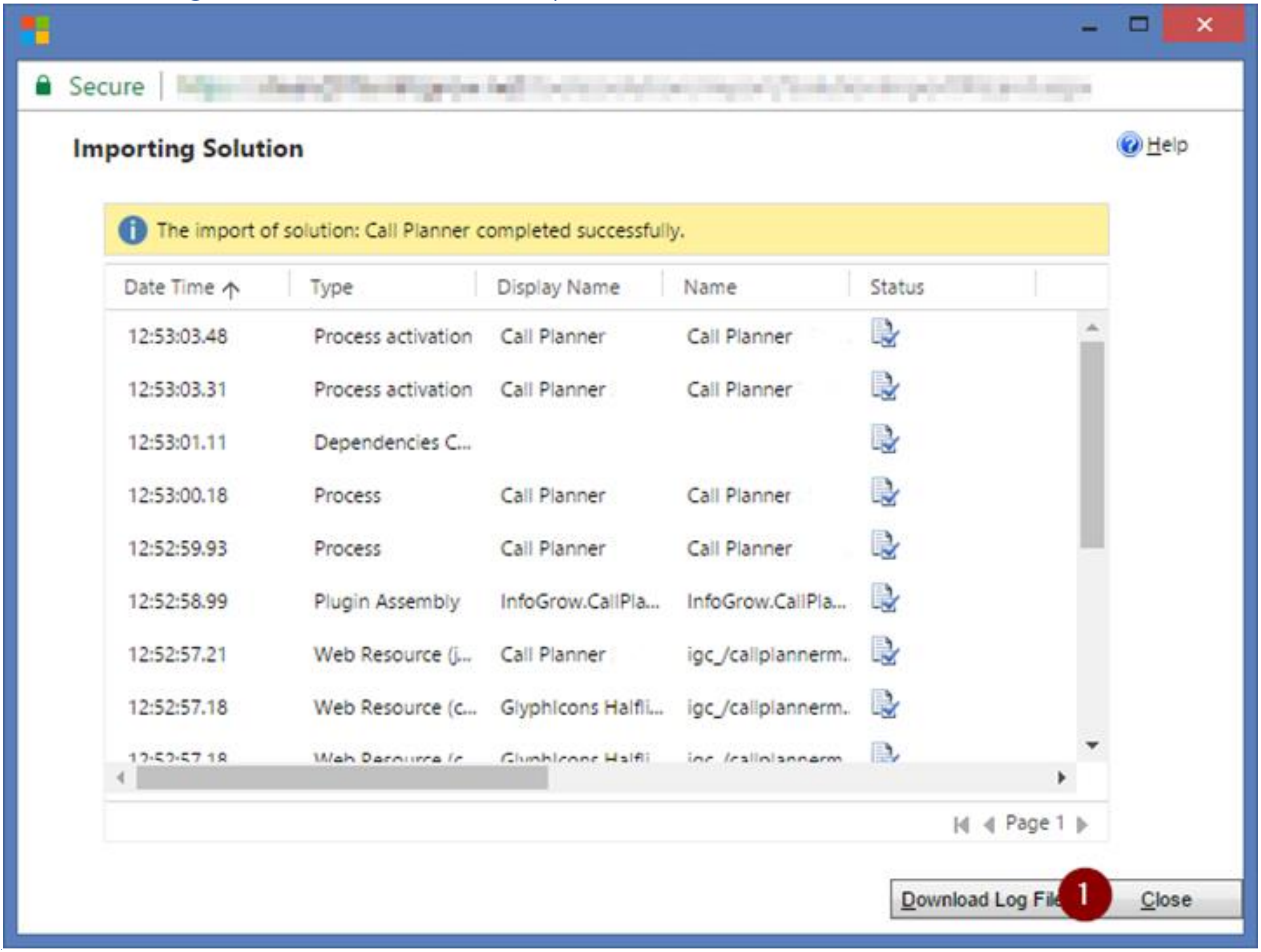
Review the Log and Close the Solution Import Wizard



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

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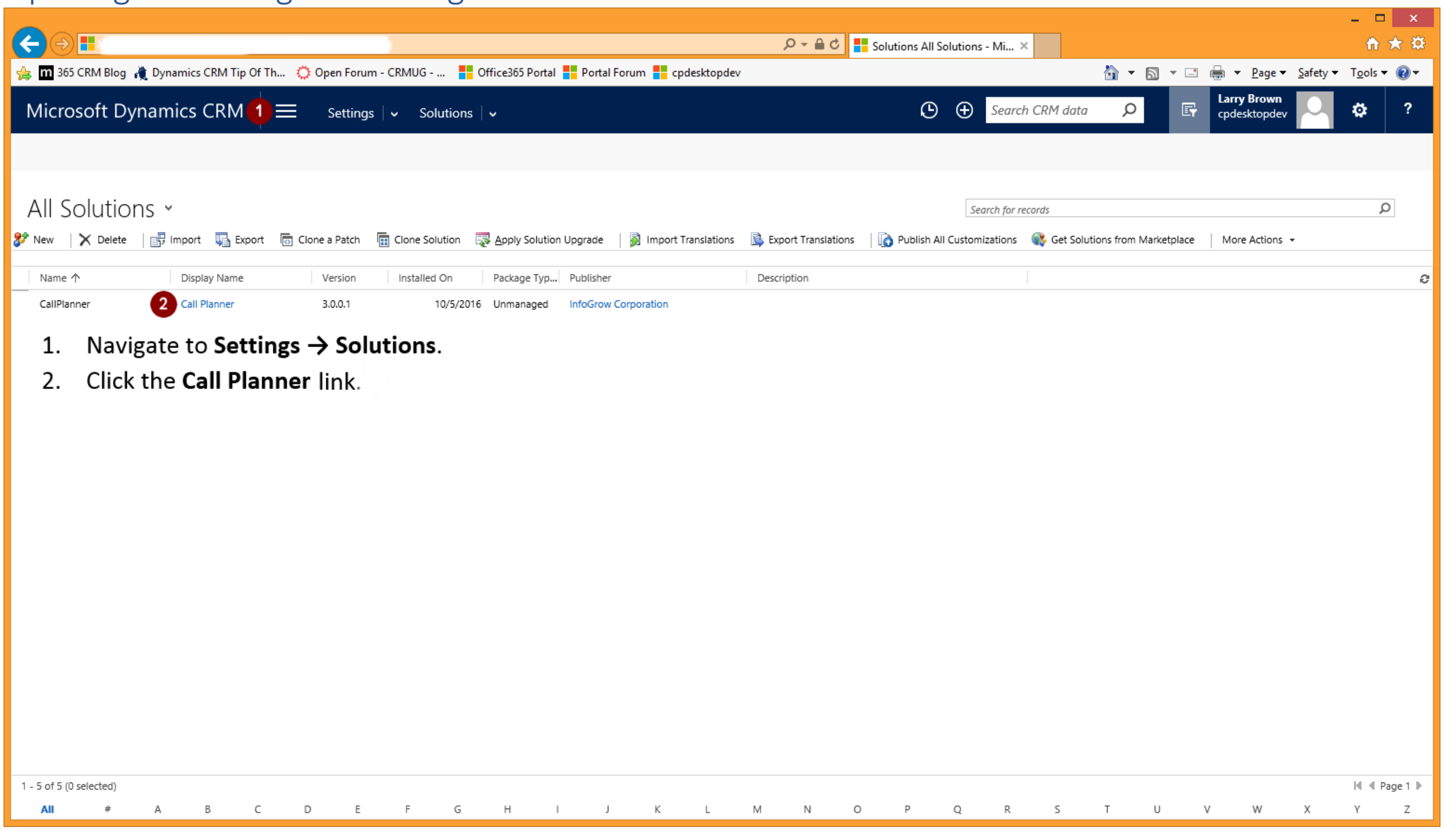
Configuring SmartMap Desktop in Dynamics 365

Opening the Configuration Page



1. Navigate to **Settings → Solutions**.
2. Click the **Call Planner** link.

3. Select the Configuration link.

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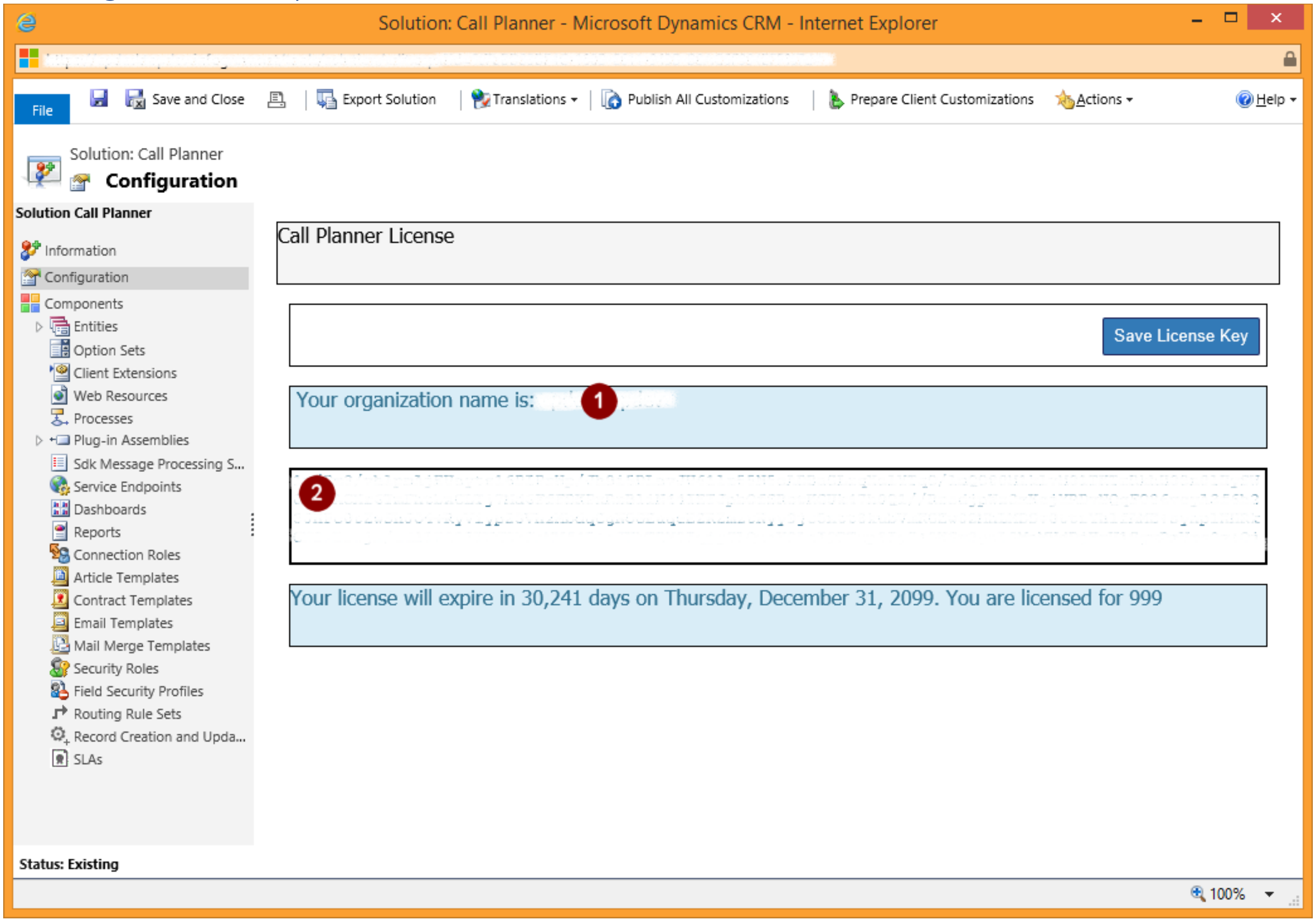
Entering a License Key



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

1. Contact InfoGrow Corporation at support@infogrowcroporation.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.

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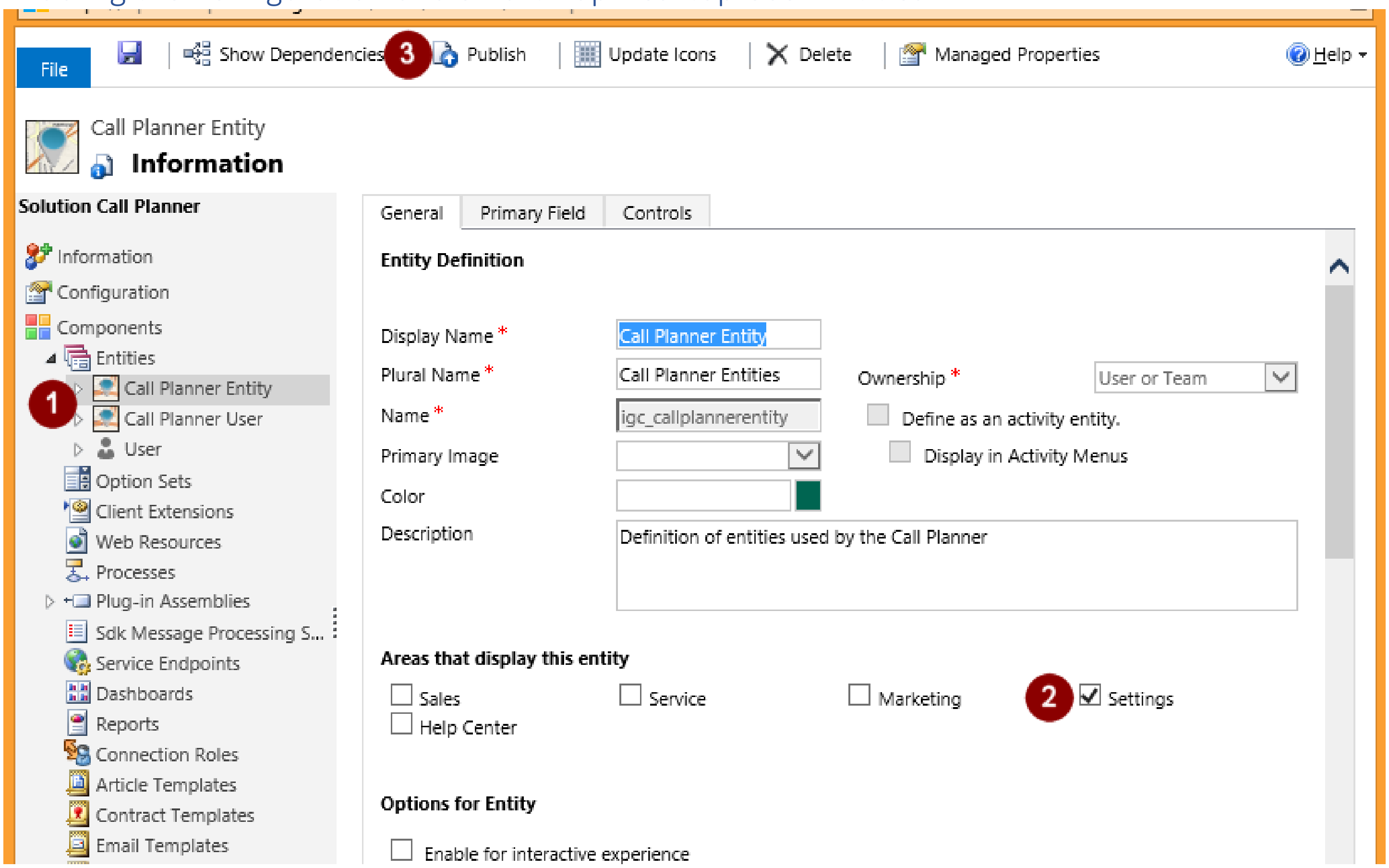
Enabling the Configuration and SmartMap Desktop User Entities



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.

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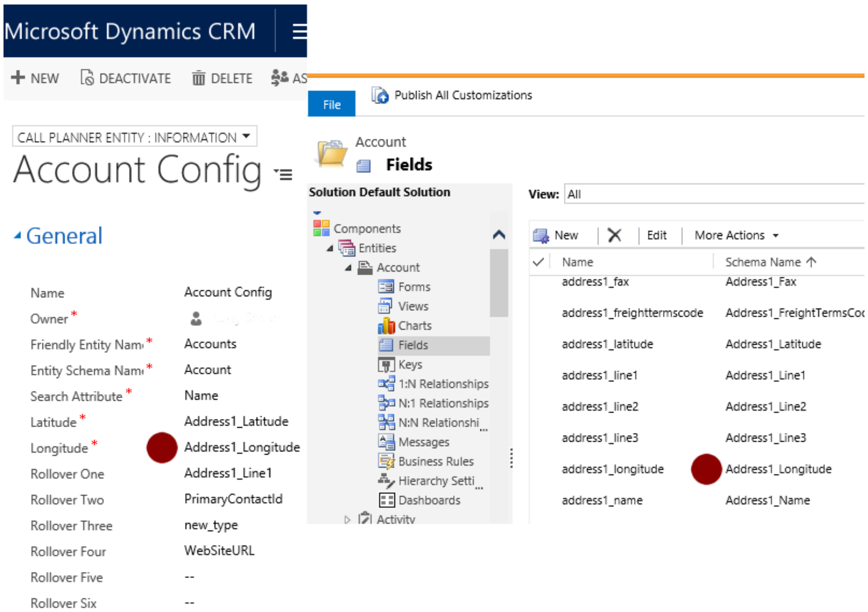
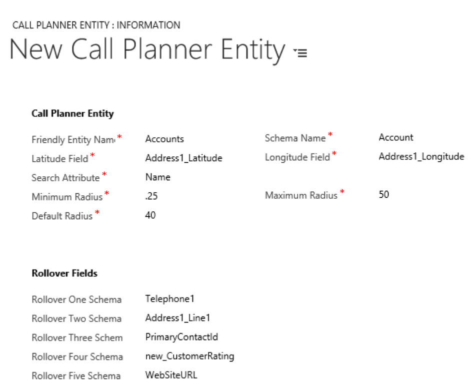
3. Friendly Entity Name – Required, name that will appear to the users in the application.
4. Entity Schema Name – Required, use schema name, case sensitive. Used for querying in the application.



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.



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Adding SmartMap Desktop Users

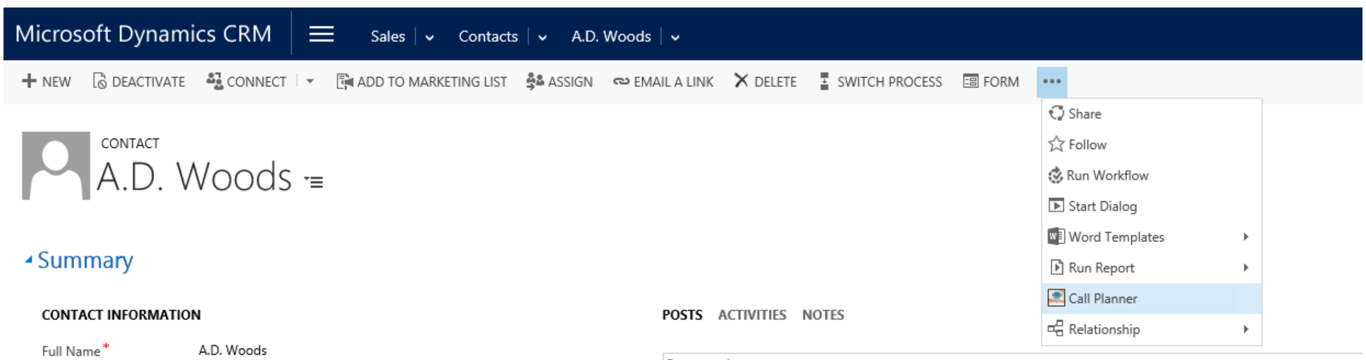
To enable users to use the SmartMap Desktop Application do the following:

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. 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.

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