

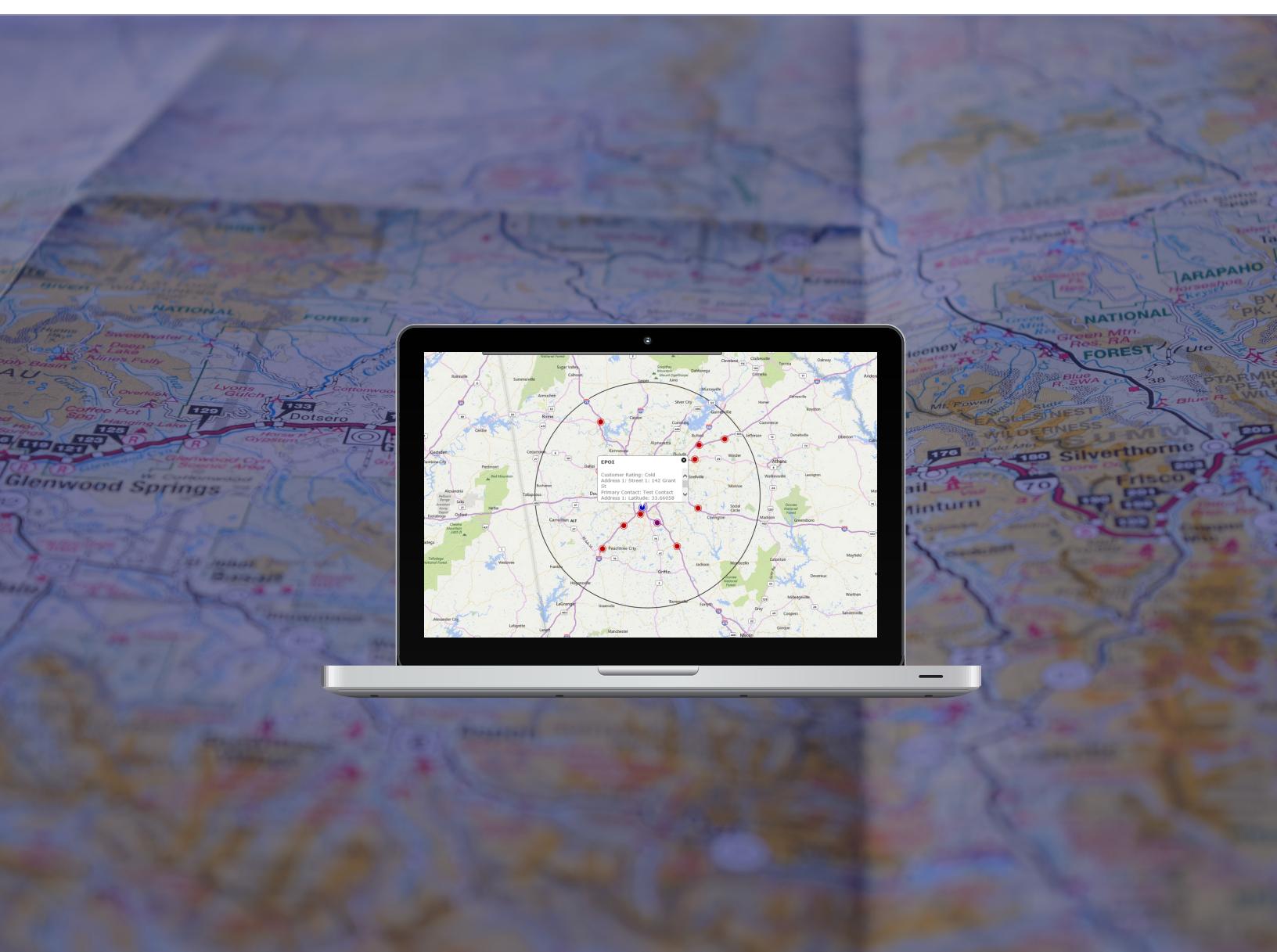


CRM SmartMap

CRM SMARTMAP

DESKTOP

Installation & Configuration Manual



InfoGrow

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Importing the SmartMap Desktop Dynamics 365 Solution

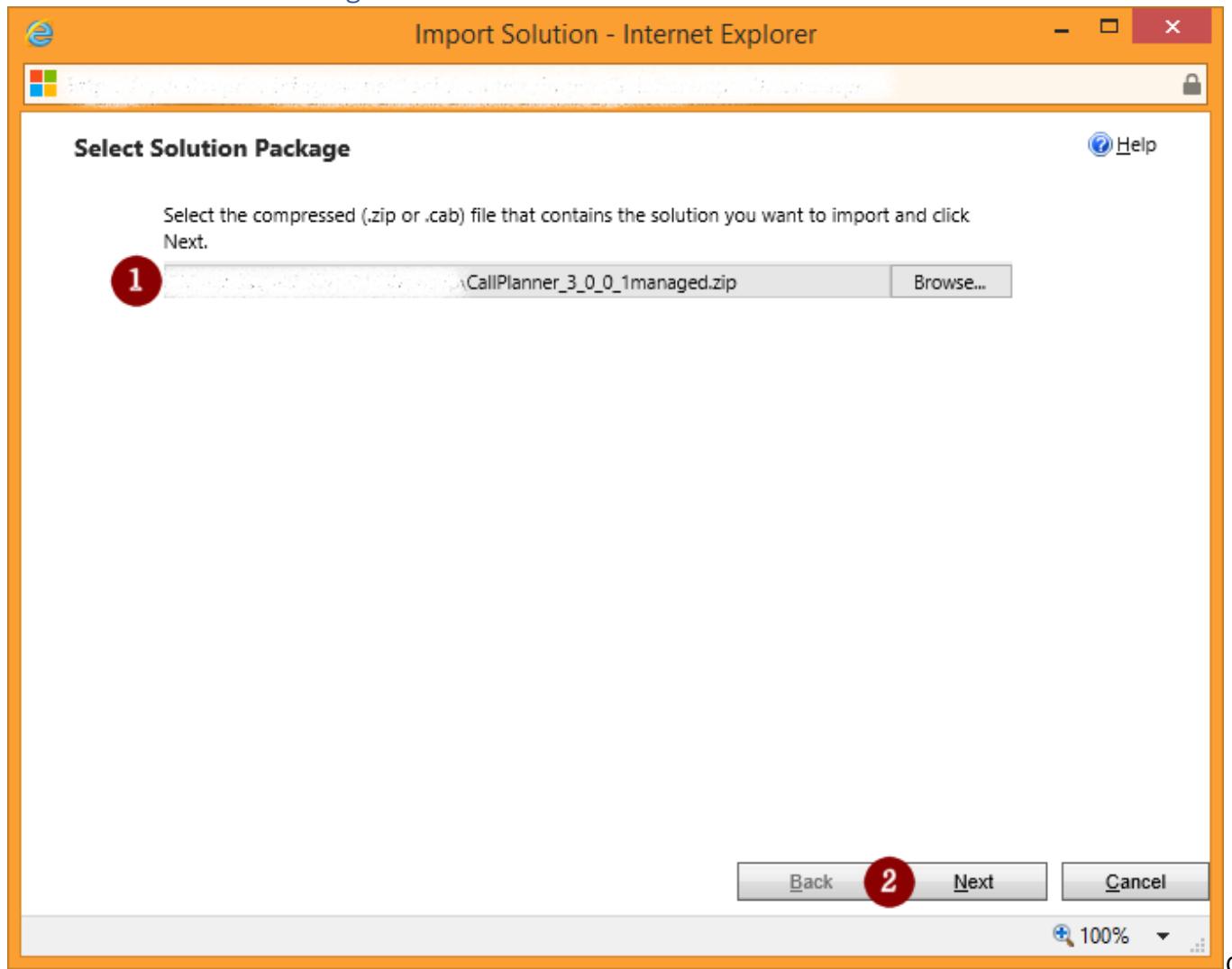
Open the Solution Import Wizard

A screenshot of the Microsoft Dynamics CRM 'Solutions' page. The top navigation bar shows 'Solutions All Solutions -'. Below it is a toolbar with icons for New, Delete, Import (which is circled in red with the number 2), Export, Clone a Patch, Clone Solution, and Apply Sol. The main area title is 'Microsoft Dynamics CRM' with a red circle containing the number 1 over the '1' in 'CRM'. To the right are 'Settings' and 'Solutions' dropdown menus. The bottom navigation bar says 'All Solutions' with a dropdown arrow. The overall interface is dark-themed.

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

Solution Information

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

Solution Information

Name:	Call Planner
Current version installed:	3.0.0.1
Version contained in the update:	3.0.0.1
Publisher:	InfoGrow Corporation(InfoGrowCorporation)
Package Type:	Managed

[View solution package details](#)

Back **1** Next Cancel

1. Click the **Next** button.

If you need assistance with any of these steps or have questions, please contact us at:
support@infogrowcorp.com





Set the Import Options

Import Options

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.

[Back](#) **2** [Import](#) [Cancel](#)

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

The screenshot shows a Windows application window titled "Importing Solution". A yellow message bar at the top states: "The import of solution: Call Planner completed successfully." Below this is a table listing the import history:

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 Halfli...	igc_callplannerm...	
12:52:57.18	Web Resource (c...	GlyphIcons Halfli...	igc_callplannerm...	

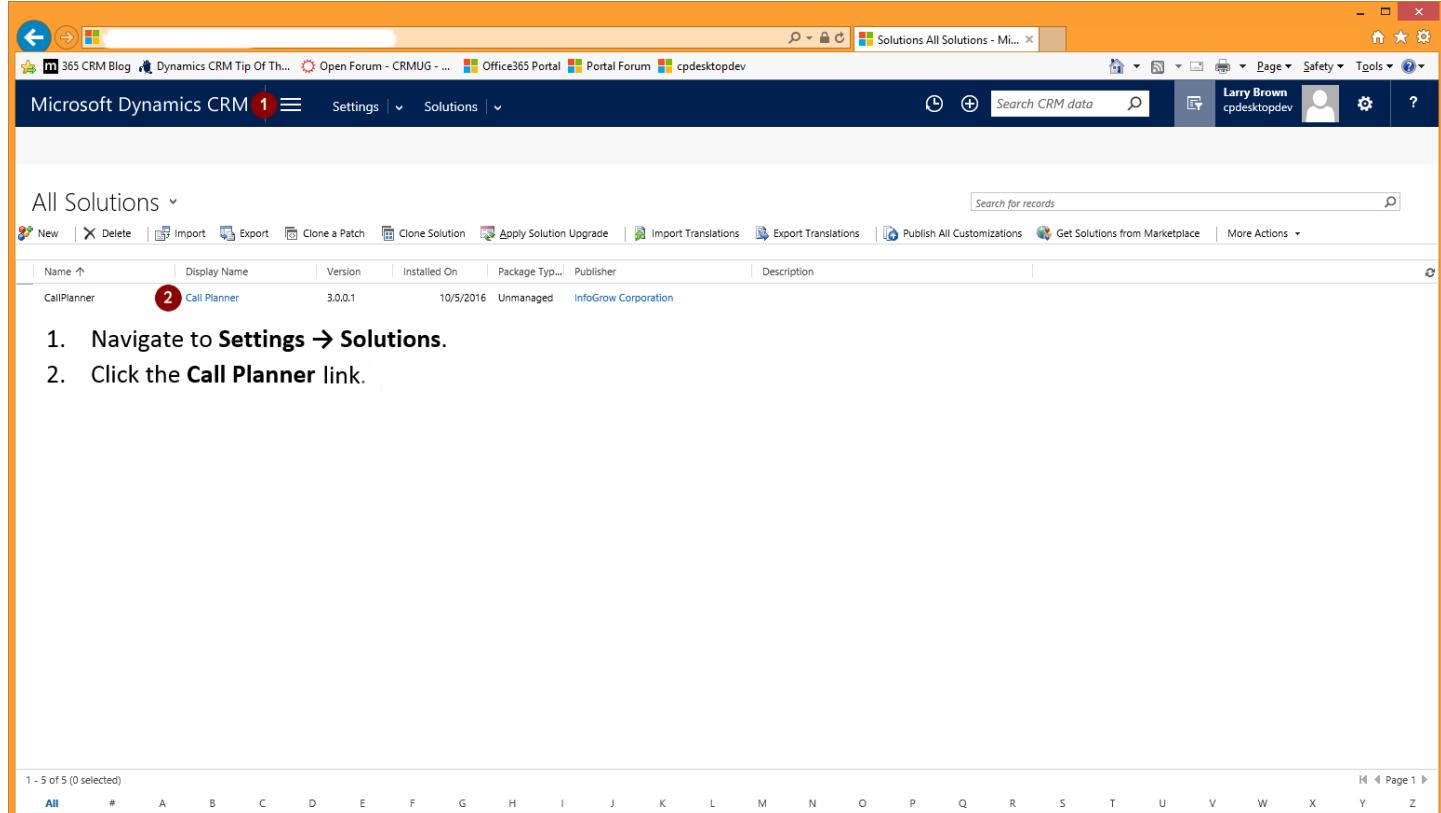
At the bottom right, there are buttons for "Download Log File" (with a red circle containing the number 1) and "Close".

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



Configuring SmartMap Desktop in Dynamics 365

Opening the Configuration Page



The screenshot shows the Microsoft Dynamics CRM Solutions page. At the top, there's a navigation bar with links like '365 CRM Blog', 'Dynamics CRM Tip Of The Day', 'Open Forum - CRMUG - ...', 'Office365 Portal', 'Portal Forum', and 'cpdesktopdev'. Below that is the main header with 'Microsoft Dynamics CRM' and a user profile for 'Larry Brown cpdesktopdev'. The main content area is titled 'All Solutions' and contains a table with one row:

Name	Display Name	Version	Installed On	Package Type	Publisher	Description
CallPlanner	2 Call Planner	3.0.0.1	10/5/2016	Unmanaged	InfoGrow Corporation	

A red circle with the number '2' is placed over the 'Call Planner' link in the table. Below the table, there's a note: '1 - 5 of 5 (0 selected)' and a grid of letters from A to Z for filtering.

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

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

Status: Existing

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

1. Contact InfoGrow Corporation at 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 'Entity Definition' section of the customization dialog. On the left, a navigation tree highlights 'Entities' under 'Components'. A red circle labeled '1' is placed over the 'Call Planner Entity' node. In the main area, the 'Display Name' field is set to 'Call Planner Entity'. The 'Plural Name' field is set to 'Call Planner Entities'. The 'Name' field contains 'igc_callplannerentity'. The 'Ownership' dropdown is set to 'User or Team'. Two checkboxes are present: 'Define as an activity entity.' (unchecked) and 'Display in Activity Menus' (unchecked). The 'Description' field contains 'Definition of entities used by the Call Planner'. Below this, the 'Areas that display this entity' section shows 'Settings' checked (red circle labeled '2'). Other areas like Sales, Service, Help Center, and Marketing are unchecked. The 'Options for Entity' section has 'Enable for interactive experience' unchecked.

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.

The screenshot shows the Microsoft Dynamics CRM interface with the title bar "Microsoft Dynamics CRM". Below the title bar is a toolbar with buttons for "+ NEW", "DEACTIVATE", "DELETE", and "AS". The main area is titled "CALL PLANNER ENTITY : INFORMATION" and contains a sub-section titled "Account Config". On the left, there is a "General" configuration pane with fields like "Name" (set to "Account Config"), "Owner" (set to "Accounts"), "Friendly Entity Name" (set to "Accounts"), "Entity Schema Name" (set to "Account"), "Search Attribute" (set to "Name"), "Latitude" (set to "Address1_Latitude"), "Longitude" (set to "Address1_Longitude"), and several "Rollover" fields (One, Two, Three, Four, Five, Six) each set to a different schema name. To the right of the configuration pane is a navigation pane titled "Solution Default Solution" which lists "Components", "Entities", and "Account". Under "Account", there are links for "Forms", "Views", "Charts", "Fields", "Keys", "N:N Relationships", "N:N Relationships", "Messages", "Business Rules", and "Dashboards". The "Fields" link is currently selected. A list of fields is displayed on the right, including "address1_fax", "address1_freighttermscode", "address1_latitude", "address1_line1", "address1_line2", "address1_line3", "address1_longitude", and "address1_name". The "address1_longitude" field is highlighted with a red circle.

- 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			
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.

The screenshot shows the Microsoft Dynamics CRM interface for a Contact record named "A.D. Woods". The top navigation bar includes links for Sales, Contacts, and A.D. Woods. The ribbon bar has several buttons: NEW, DEACTIVATE, CONNECT, ADD TO MARKETING LIST, ASSIGN, EMAIL A LINK, DELETE, SWITCH PROCESS, FORM, and three dots. A context menu is open on the right, listing options like Share, Follow, Run Workflow, Start Dialog, Word Templates, Run Report, Call Planner (which is highlighted), and Relationship.

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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