

CRM SMARTMAP

DESKTOP

User Manual

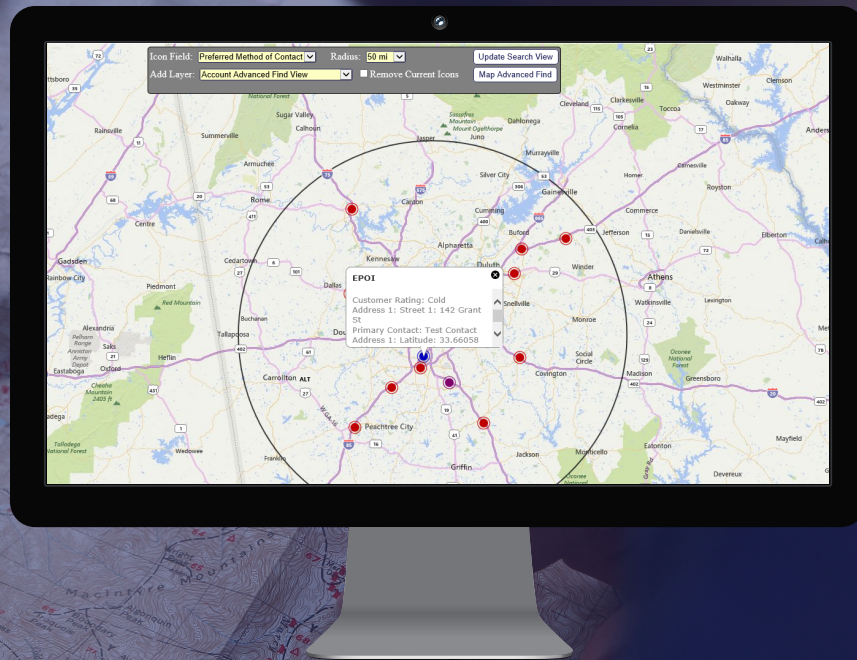




Table of Contents

Opening the SmartMap Desktop Application.....	2
Searching Options.....	2
Basic Map Navigation	3
Completed Search Options.....	5
Product Support	11

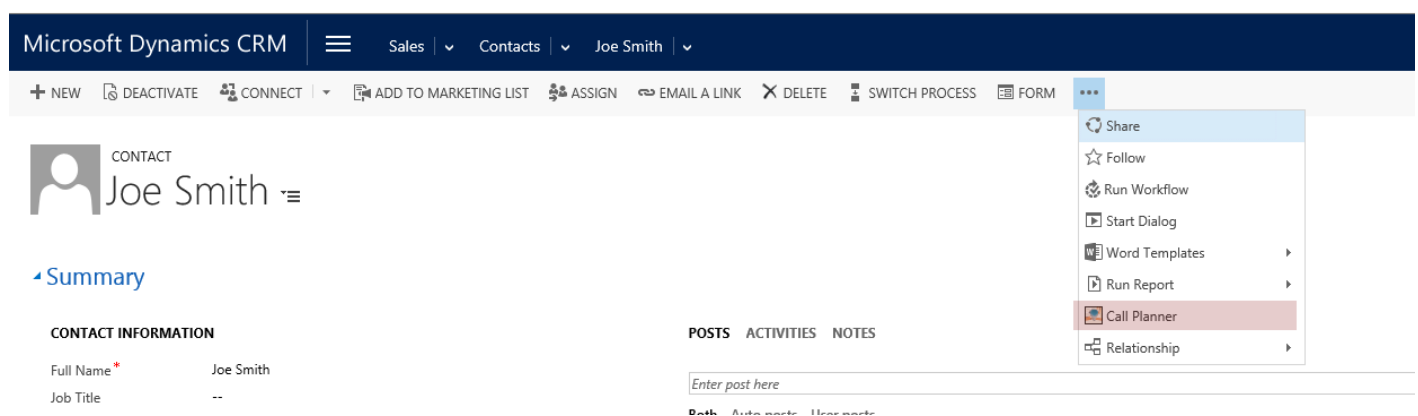


Opening the SmartMap Desktop Application

The CRM system administrator has the option of installing a ribbon button in all or one of the following records:

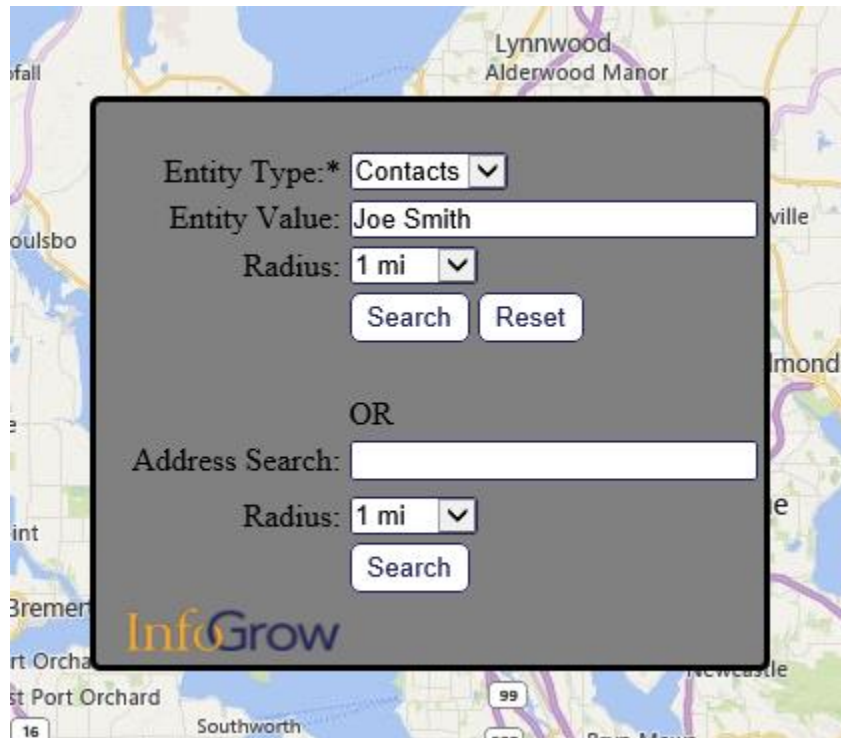
1. Contact
2. Account
3. Lead

To start the Call Planner, navigate to one of these specific records and choose the SmartMap Desktop button.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Sales', 'Contacts', and 'Joe Smith'. The ribbon menu is open, showing options like 'NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', 'ASSIGN', 'EMAIL A LINK', 'DELETE', 'SWITCH PROCESS', 'FORM', and a dropdown menu. The dropdown menu includes 'Share', 'Follow', 'Run Workflow', 'Start Dialog', 'Word Templates', 'Run Report', 'Call Planner' (highlighted), and 'Relationship'. The main content area shows the 'CONTACT' record for 'Joe Smith' with a 'Summary' tab selected. The 'CONTACT INFORMATION' section displays 'Full Name' as 'Joe Smith' and 'Job Title' as '--'. The 'POSTS' tab is also visible, showing a text input field with the placeholder 'Enter post here'.

Searching Options

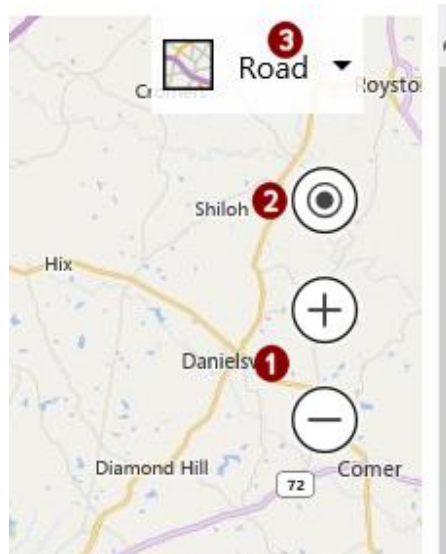
The search screen allows for two different types of search. By a specific entity and value or by using an address or location such as an airport name. The specific entities and values used for searching are setup by your CRM administrator. The following describes each option.

1. Required for search, entities that have been setup to be used within the SmartMap Desktop.
2. If using the upper search, required. The entity value allows for partial (wildcard) searching. For example, if you are searching for an Account that has the letters “lab” in its name. One can just enter lab and search and all Accounts with “lab” in them will appear for selection. This search is not case sensitive.
3. The distance to find locations surrounding the specific entity that is being searched on.
4. Search and reset the upper search parameters.
5. Required if searching by address or location.
6. Radius and search button controlling the address search.

Basic Map Navigation

SmartMap Desktop uses Bing maps by Microsoft for its base functionality. The same functionality that is provided by the control when using the Bing search engine is available when using the SmartMap Desktop.

To zoom in one can double click on any point on the map. One can also use the middle mouse scroll button to zoom in and out or the default zoom control provided by Bing. Below is the functionality of the map control:



1. Zoom in and Out
2. Move map to the current location
3. Toggle map between road, aerial and street side views.

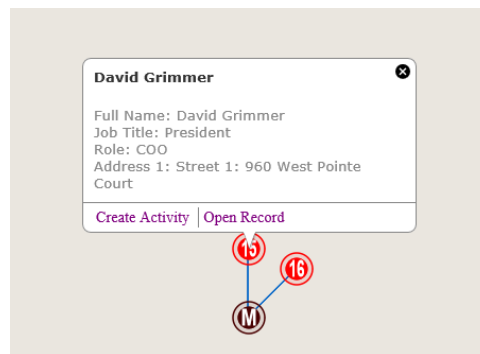
The locations of the default search layer will return two different types of icons if needed. The first is an icon, with a number on top, where just a single location appears. Icons are numbered from closest to farthest from the center search point.



There is also an icon to represent a location where multiple records within the CRM entity are located. To see the locations just click on the M on the icon to zoom in. When done click on the M again to zoom back to your previous location.



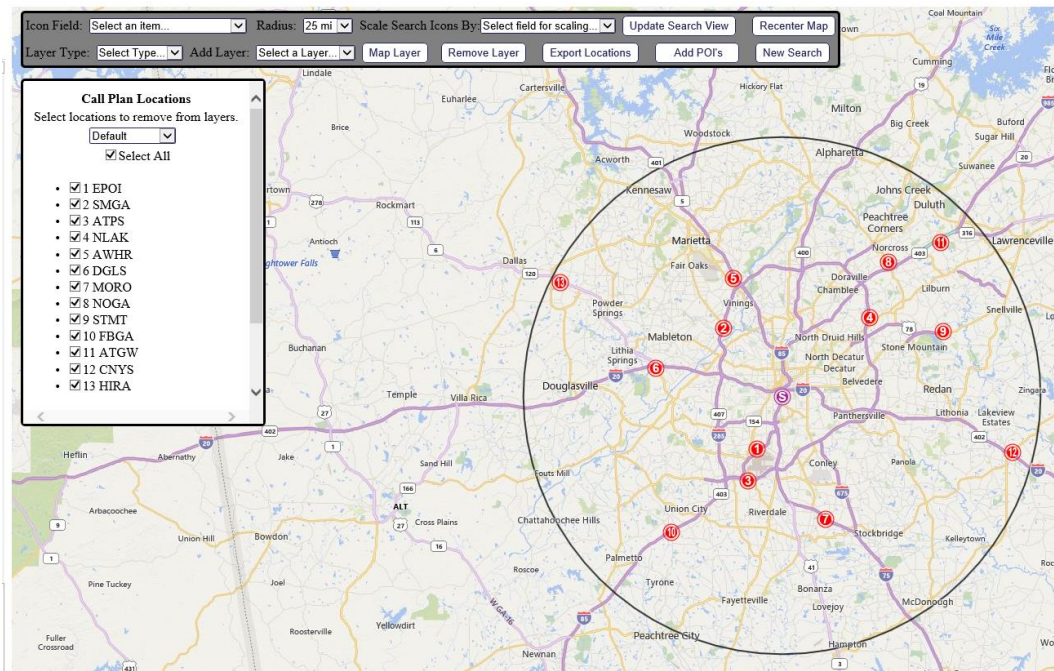
To see information on any numbered location, tap the icon to display the message box.



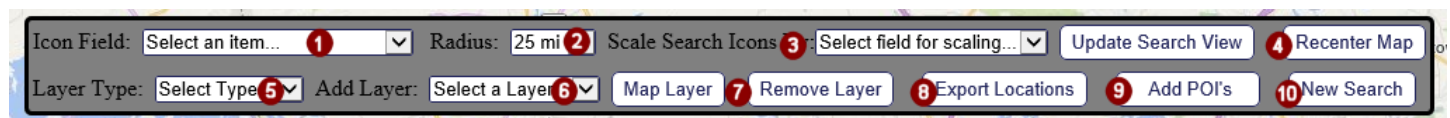
Once the message box is open the user has the option to create a CRM activity or open the specific record.

Completed Search Options

After searching, as described in the above section, the application will pull all locations found within the selected radius.

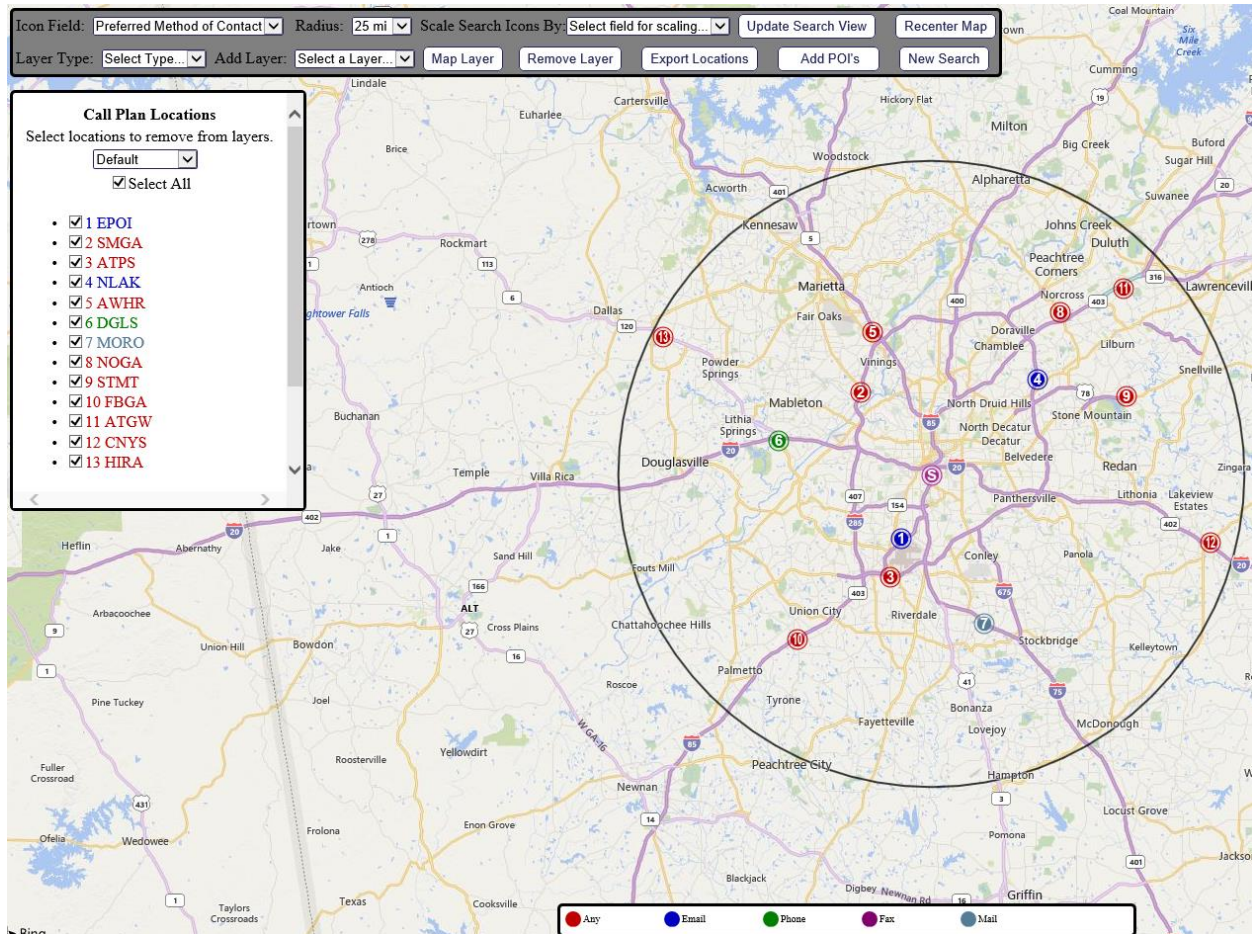


The grey top toolbar options pertain to the current searches and allow for the following choices outlined below.





1. Icon Field – When choosing a field from this drop-down the map will color the icons based upon their values. A legend will also appear showing the colors and the values they represent. To display the location by type, select a field then click the update search view button. Icons that do not have a value for the selected field will display a magenta color for their icon. Note only certain fields that meeting the application requirements will appear in this drop-down (option sets with twenty or less choices).



2. Radius – Allows a user to change the radius of their initial search. By clicking the update search view button with a new radius, the application will execute the search based on the original parameters that were passed into this view.
3. Scaling Field – By selecting a field from here the icons will scale by size based upon the field.
4. Re-center Map – Will center the map and zoom based upon the original search.
- 5 – 7 – Items 5 through 7 are based upon advanced find views that the user has rights to execute. Note the options that will appear for these are controlled by the CRM system administrator. Any entity that has been configured for the SmartMap Desktop and has a system or user view will be available.
5. Select Type – Allows the user to select a type of entity to select a view from, and adds the saved views to 6.
6. Select a Layer – Any saved or system views available to the user based on the entity selected in 5.



- Icon Field: Radius: Scale Search Icons By:

Layer Type: Add Layer:

Call Plan Locations

Select locations to remove from layers.

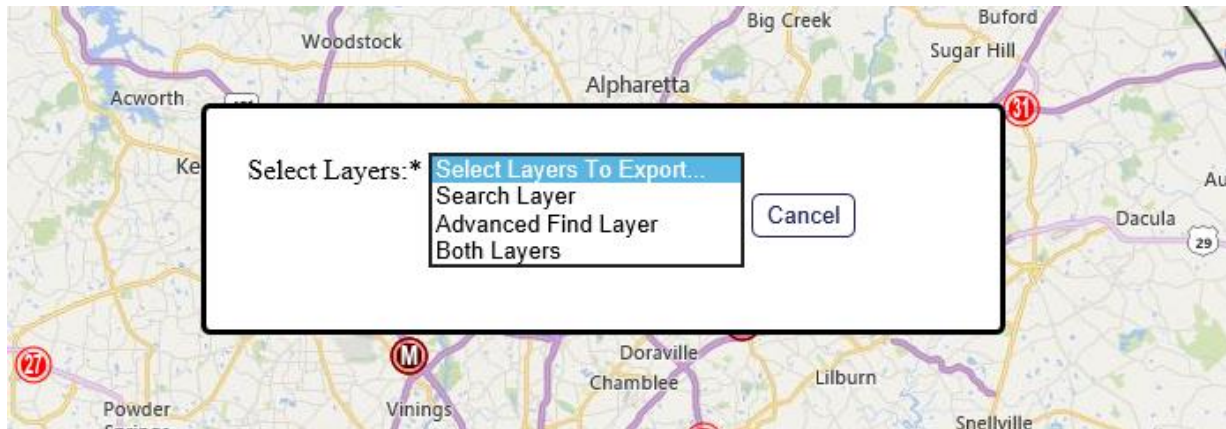
Default

☒ Select All

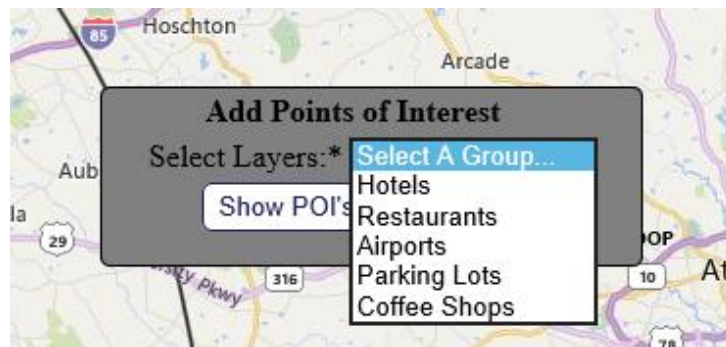
 - ☒ 1 Jeff Sanson
 - ☒ 2 Philip Cajka
 - ☒ 3 David A Princic
 - ☒ 4 Teresa Curtis
 - ☒ 5 Christopher Forslund
 - ☒ 6 Jim Heilmeier
 - ☒ 7 Ronald Friedman
 - ☒ 8 Joseph L Rizzi Sr
 - ☒ 9 Nathan Offenberg
 - ☒ 10 Gary Bunge
 - ☒ 11 Jeff Berkes
 - ☒ 12 Rob Minster
 - ☒ 13 Laura Mc Phee
 - ☒ 14 David Grimmer

Legend: CEO (red circle), COO (blue circle), CSO (green circle)

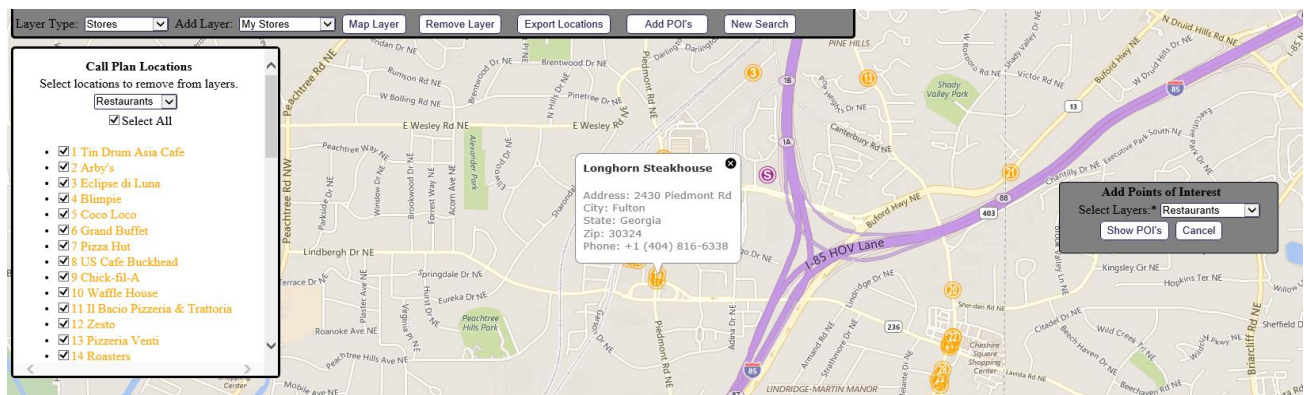
8. **Export Locations** – Allows the users to export locations based on the initial search or the added layer. The output of the file format is csv. The columns exported will be the fields defined in the location's rollover.



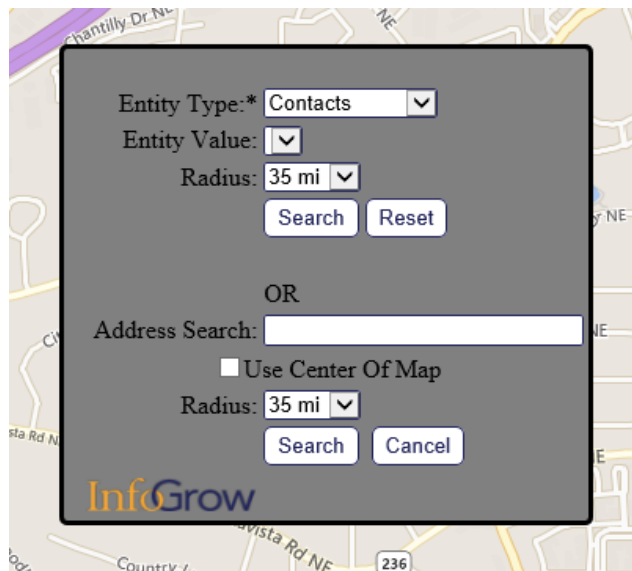
9. POI (Points of Interest) – Allow a user to add different layers of interest that they may need for their trip.



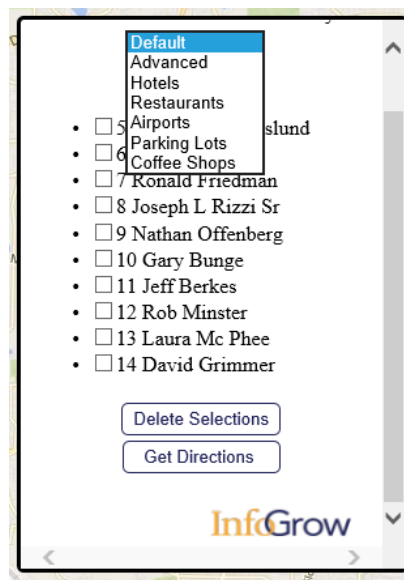
When enabling this feature the application will use the center of the map to return the closest fifty types of each POI. Each of the selections will be available as a layer to add to the trip plan.



10. New Search – This button will remove all current layers and allow the user to begin again with a new search.

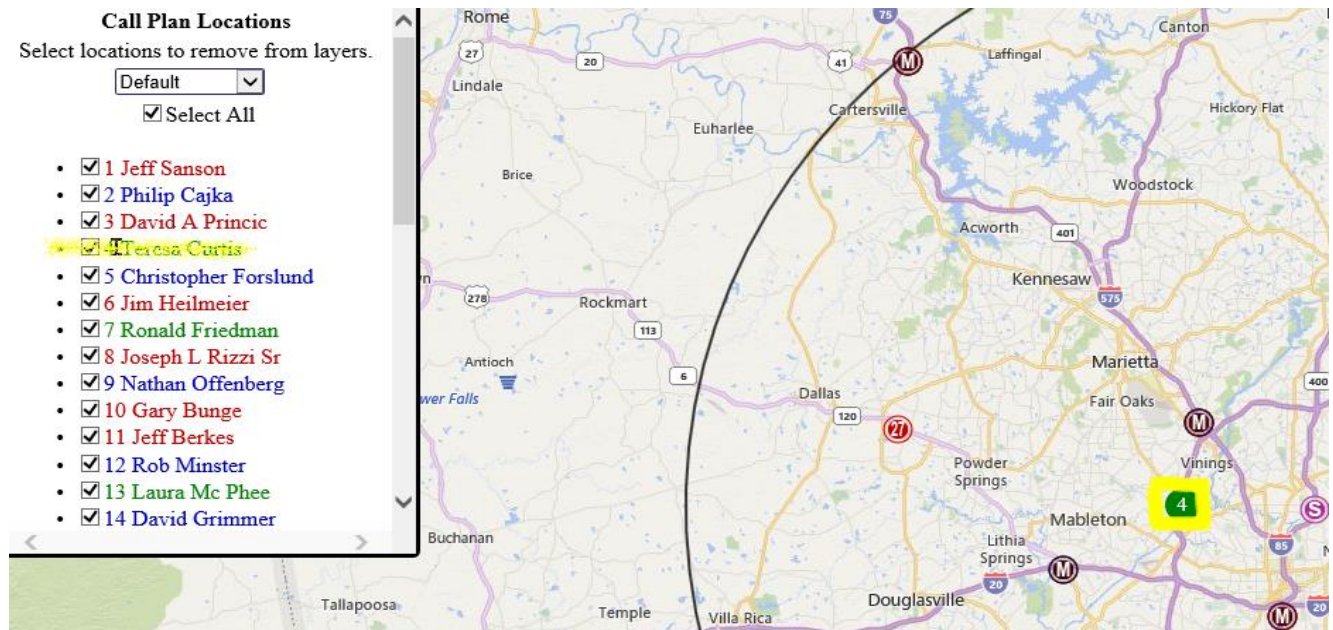
The left-hand location control allows users to control locations used in their call plan and to get directions/send to device.



The control allows users to select a specific layer then remove the locations that are not of interest for the current call plan. To remove locations, select the specific location layer, check the box next to them and click the delete selections button. This button only deletes locations from the currently selected layer.



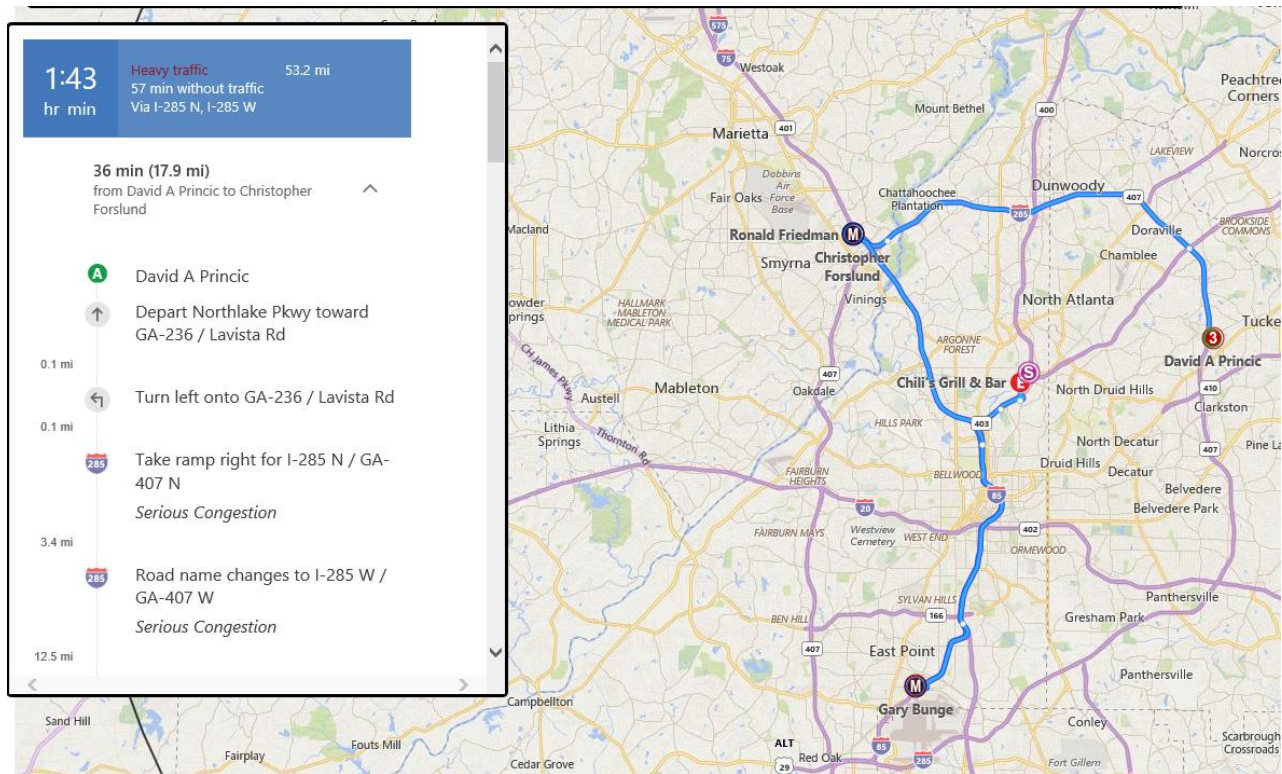
A specific feature for the default and advanced layers when working in a desktop environment is to highlight icons on the map when moving the mouse cursor over an item in the list. Also, if the Icon Field is used the text in the layer control will also match the type and color of icon.



When done editing and planning a trip the user will then select the Get Directions button. The next screen allows the user to set the order of travel for their locations. This screen also allows the user to add the initial search location to their trip. Please note, there is a limit of twenty locations that can be used for any specific call plan.



Once the order is correct the user selects the Get Directions button again to preview their daily route.



At the bottom of the user layer the user has the option to send the Call Plan to their mobile device (coming soon to Android and iPhone devices.) This option allows the user to execute their call plan on their phone or mobile device and receive turn by turn vocal directions while driving. To use this option please have your system administrator install the CRM SmartMap Desktop Mobile solution.

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.

330-929-1353

www.infogrowcorp.com

InfoGrow

© 2017 InfoGrow Corporation