

## USER MANUAL

### MAPPYFIELD 365



 appjetty

# MappyField 365

**Version: 5.0**

**Compatibility:**

Dynamics 365 (v9.0) and above

# **TABLE OF CONTENTS**

Introduction ..... 5

Benefits of MappyField 365 ..... 5

Prerequisites ..... 5

Installation & Activation..... 6

    Installation Steps ..... 6

    Activate Your Free Trial ..... 8

    Activation ..... 10

    Insert License Key ..... 11

Setup for Admin ..... 12

    Default Configurations (Setup)..... 12

    Configure Languages ..... 14

    Assign User Role ..... 15

    User Wise Map Configuration ..... 16

    Security Template Configuration ..... 19

Entity Mappings ..... 21

Geocode Records ..... 27

    Manually Geocode the Record..... 27

    Non-Geocoded Records ..... 29

Individual Records on Map View ..... 30

    MappyField 365 section in Record Details ..... 30

    View Map from Entity Menu ..... 32

Map View ..... 33

    Default Location ..... 35

    Plot the records on Map..... 36

        Select Entity ..... 36

        Pin selection for records..... 38

Cluster Map Records .....	39
Advance Options .....	41
Marketing List.....	41
Point of Interest (POI).....	42
Category Search.....	43
Summary Card .....	44
Search Options .....	45
By Region .....	46
By Drawing.....	47
By Territory.....	48
By Proximity.....	49
By User.....	49
Layer Menu.....	50
Save Template .....	52
Map View options .....	53
Tooltip Details .....	54
Add to Origin .....	56
Add to Destination .....	57
Send Email using Template .....	58
Assign Owner.....	58
Assign to Marketing List .....	59
Proximity Search.....	60
Add Task .....	62
Add Appointment.....	63
Point of Interest.....	64
Related Records.....	65
Delete Record .....	66
Deactivate Records:.....	67
Qualify Lead.....	67
Reactivate Lead .....	69
Direction .....	70

- Multiple Routes ..... 71
- Email Route ..... 74
- Save Route ..... 74
- SPF (Shortest Path First) ..... 76
- Templates ..... 77
- Locations ..... 79
  - Add New Location ..... 79
  - Track User ..... 80
- Data Grid ..... 81
  - Add Record to Route ..... 83
  - Assign to User/Team: ..... 84
  - Send Email using Template ..... 85
  - Manage Territory..... 85
  - Auto Schedule Records..... 86
- Auto Schedule Records ..... 86
- Check-Ins/Check-Outs ..... 90
- Contextual Menu ..... 93
- Territory Management..... 94
- Heat Map..... 98
- Analytical Dashboard ..... 101
  - MappyField 365 Reporting Dashboard ..... 101
  - MappyField 365 Reporting Dashboard ..... 102
  - MappyField 365 Sales Activity Dashboard ..... 103
  - MappyField 365 Sales Performance Dashboard ..... 103
  - MappyField 365 Service Activity Dashboard..... 104
- Uninstallation Steps ..... 106
- Contact Us ..... 107

## Introduction

**MappyField 365 Dynamics CRM** plugin provides geo-analytical solutions to CRM users and helps them to plot CRM data in maps. It lets user choose an entity, CRM or custom view to plot all individual records from that entity on the map. You can map multiple entities, address related to customer entities at a time. Also, you can save different user preferences as such map configurations, zoom levels, and views for future references.

## Benefits of MappyField 365

- Ease of access
- Plot any entity record on the map
- Concentric proximity Search across entities
- Build marketing list
- Qualify/Disqualify lead records
- Point of interest search
- Color code pushpins and heatmap
- Routing with multiple waypoints
- Auto Schedule Records
- SPF: Shortest Path First for Route
- User Tracking
- Ability to save & share driving directions
- Check-In & Check Out option for all Activities
- Sales analysis becomes easy with Opportunity and Sales Heat Map
- Dashboard support
- Seamlessly integrates within Dynamics CRM

## Prerequisites

Following point must be followed before starting the Plugin installation:

- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.
- You will have to generate **Bing Map API** key. [How to generate Bing Map API Key?](#)

# Installation & Activation

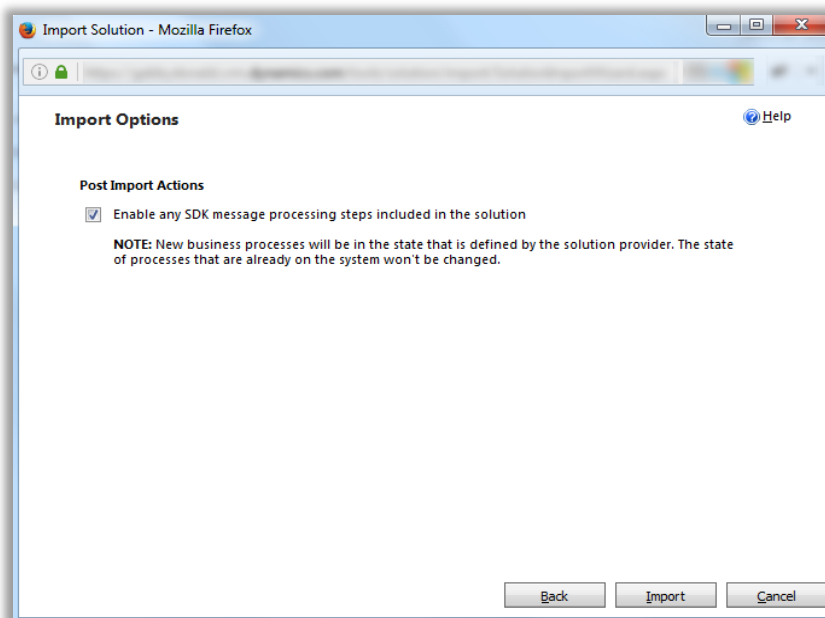
## Installation Steps

➤ To install '**MappyField 365**' plugin, the following steps are to be followed:

- On purchasing the plugin, you will get a zip file named "**MappyField 365 365.zip**".
- Login into your CRM Account and click on **Settings -> Solutions**.

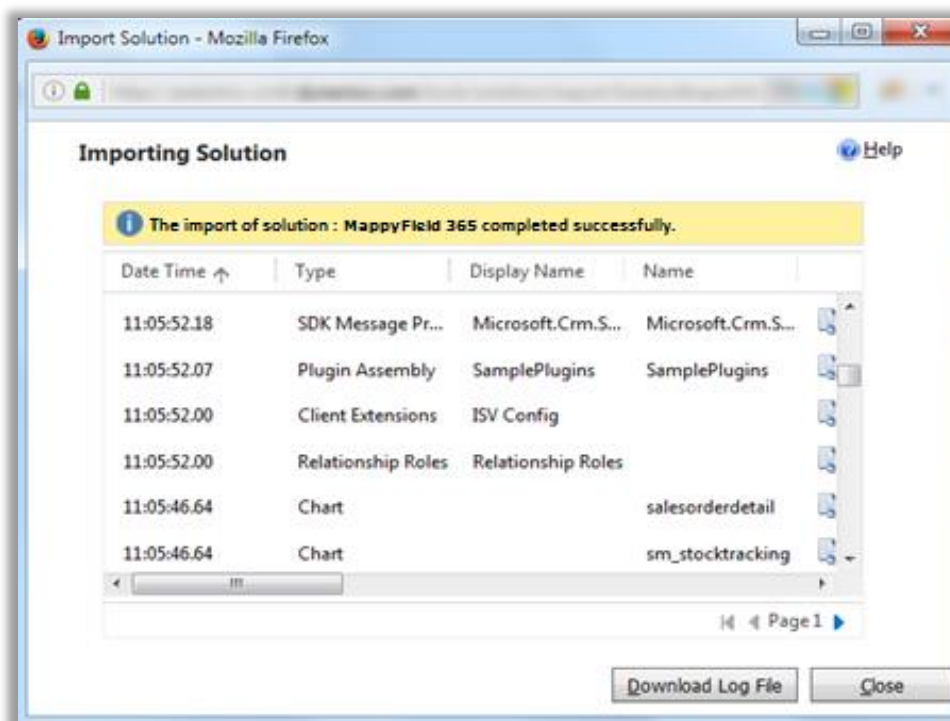


- Click on '**Import**' to upload and install the Solution.
- Click on '**Choose File**' button and choose the Package Zip File for **MappyField 365** from the Import Solution Window. Click on '**Next**' for further processing.

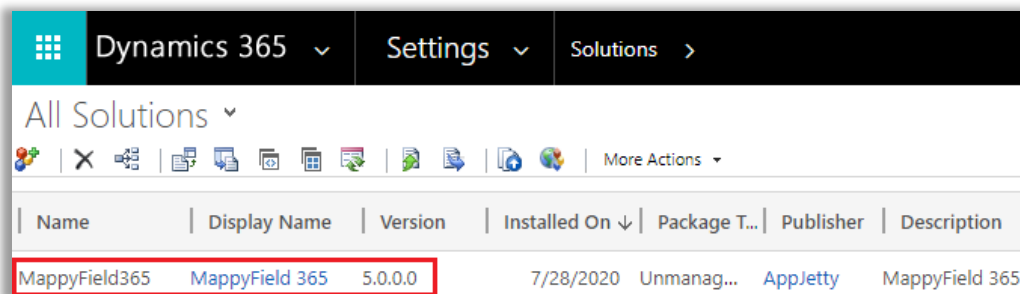


## USER MANUAL: DynamicsCRM MappyField 365

- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.



- Click on 'Close' after successful completion message is displayed.
- Once you import the solution, it will be displayed in the solutions grid view.



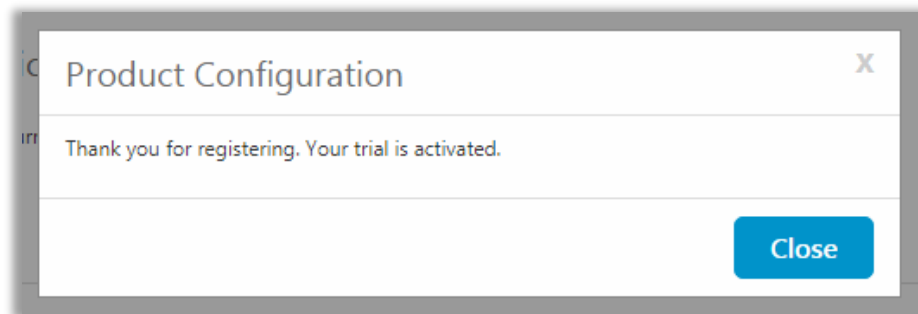
### Activate Your Free Trial

- Double click on 'MappyField 365' solution to configure the plugin with your license key.
- This will open up a new window. Click on 'Configuration' from the options provided on the left side.




The screenshot shows a web application window titled 'Appjetty'. On the left is a navigation menu with categories like Information, Configuration, Components, and Plug-in Assemblies. The main content area is titled 'Activate Your Free Trial' and contains a form with the following fields: 'First Name\*' (filled with 'Renley'), 'Last Name\*' (filled with 'Snow'), and 'Email\*' (filled with 'renleysnow251@gmail.com'). Below the form is a link 'For any queries, visit [Appjetty Support](#)' and a blue 'Activate' button. In the top right corner, there are two status boxes: 'Expire On:' and 'Status: Unregistered'.

- You can activate your one-month free trial.
- To get a one-month free trial license key, fill out the details and click on 'Activate' button.



- Your trial will get activated and expiry date will be displayed on top.





**Expires On:**  
5/6/2018

**Status:**  
Trial

[Profile](#) [Setup](#)

### Purchase License

Your free trial is currently active. You can purchase the plugin anytime by clicking on the below button.

Buy Now

---

### License Details


License Key:

**Your free trial will expire in 30 day(s)**

**Note:** This is not real time information and will be updated in the next 24 hours.

For any queries, visit [AppJetty Support](#)

- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.



**Expires On:**  
12/5/2017

**Status:**  
Trial-Expired

[Profile](#) [Setup](#)

### Purchase License

Your free trial is expired. You can purchase the plugin anytime by clicking on the below button.

Buy Now

---

### License Details

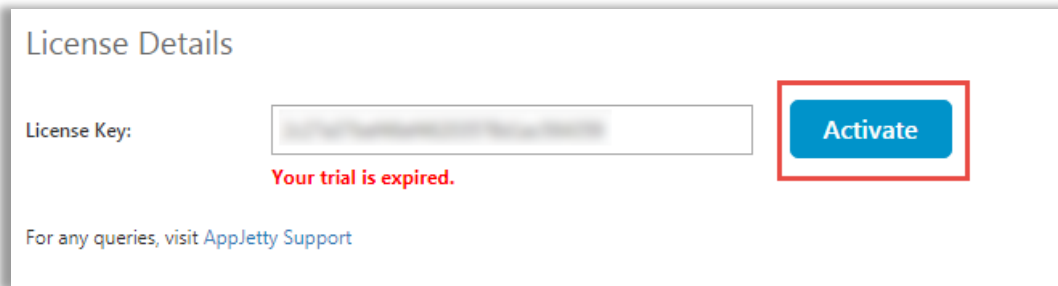
License Key:

**Your trial is expired.**

For any queries, visit [AppJetty Support](#)

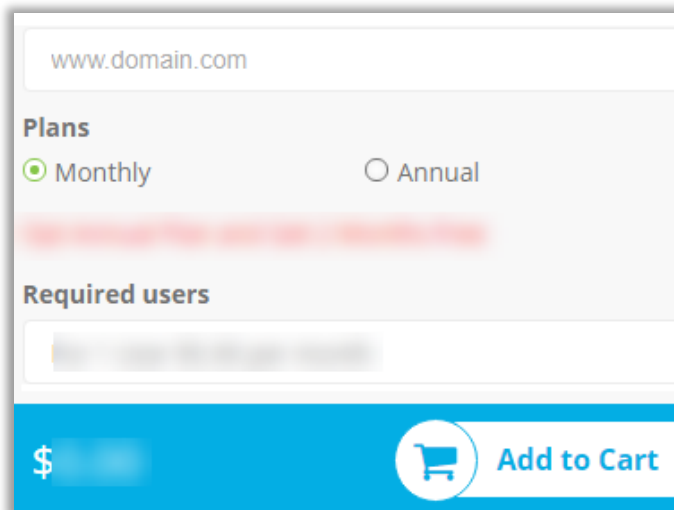
## Activation

- On expiration of Trial, a message will appear that the Trial is expired.



The screenshot shows a 'License Details' form. It includes a 'License Key:' label followed by a text input field containing a blurred license key. Below the input field, a red message states 'Your trial is expired.' To the right of the input field is a blue 'Activate' button, which is highlighted with a red rectangular border. At the bottom of the form, there is a link that says 'For any queries, visit AppJetty Support'.

- Now to purchase the license click on 'Buy Now' button.
- This will redirect you to our product page and a pop-up will appear. Click on 'Add to Cart' button and complete the purchase process.

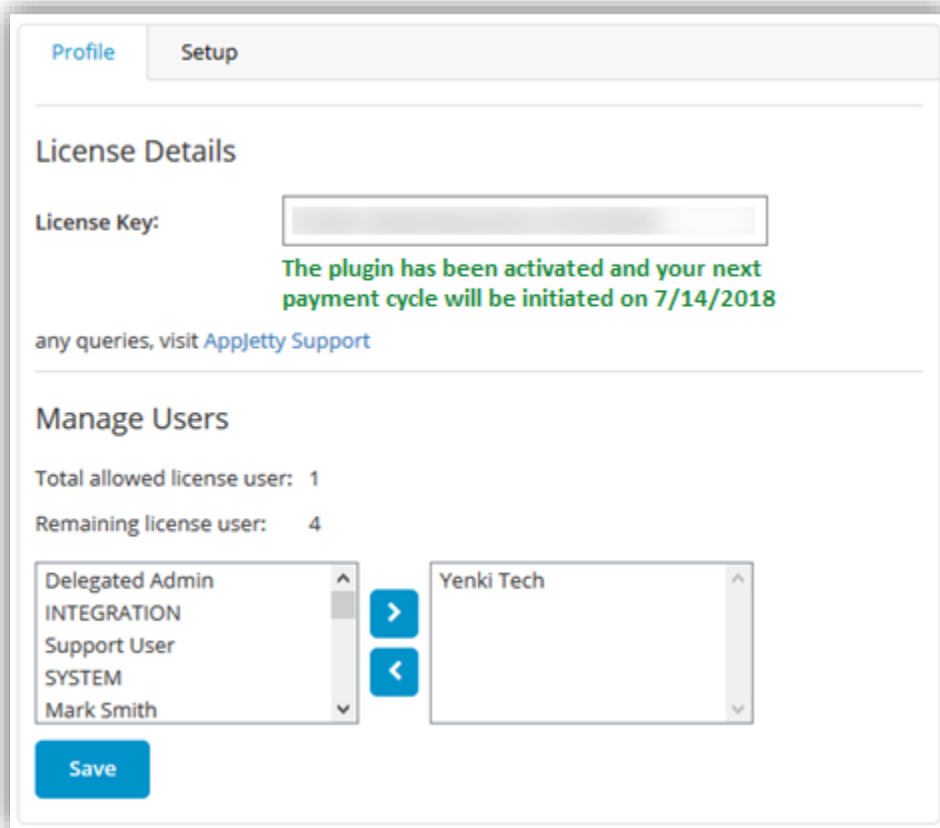


The screenshot shows a product page for 'www.domain.com'. It features a 'Plans' section with two options: 'Monthly' (selected with a green radio button) and 'Annual' (unselected with a gray radio button). Below the plans, there is a red message that is blurred. Underneath, there is a 'Required users' section with a text input field containing a blurred value. At the bottom of the page, there is a blue bar containing a price tag with a dollar sign and a blurred amount, followed by a blue circular button with a white shopping cart icon and the text 'Add to Cart'.

- On successfully completion of the purchase process, you will receive your license key via email along with steps to complete the license configuration.

## Insert License Key

- Enter the New License key received in mail. This will enable the '**Activate**' button.
- Click on '**Activate**' button to activate your license.



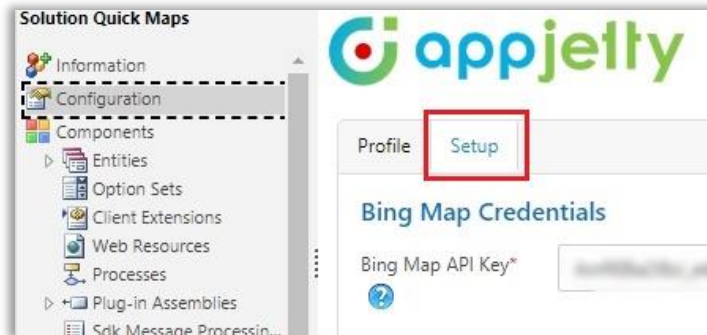
The screenshot shows the 'Setup' tab of the AppJetty interface. Under 'License Details', there is a text input field for the 'License Key'. Below it, a green message states: 'The plugin has been activated and your next payment cycle will be initiated on 7/14/2018'. A link for 'AppJetty Support' is provided. The 'Manage Users' section shows 'Total allowed license user: 1' and 'Remaining license user: 4'. It features two lists: a source list on the left containing 'Delegated Admin', 'INTEGRATION', 'Support User', 'SYSTEM', and 'Mark Smith'; and a target list on the right containing 'Yenki Tech'. Blue arrow buttons are used to move users between the lists. A 'Save' button is at the bottom left.

- Default settings under set up tab can be managed only if a user has **System Administrator Role**, **AppJetty MappyField 365 Admin**. Or else it would show error message stating “You don’t have administrative rights. Please contact administrator.”

## Setup for Admin

### Default Configurations (Setup)

- To manage the default configuration settings for Admin user, click on 'Setup' tab and enter default configurations.
- Admin user can set the default view of the map by configuring from here.



- Bing Map API Key:** Enter Bing map API key which you have generated from <https://www.bingmapsportal.com/>.

**Note:** To assist you further, we have added a link beneath the text box that states **How to generate Bing Map API Key**.

- Under "Default Configuration" option, set default **Latitude**, **Longitude** and **Zoom** level for map when it is opened for the first time.

- You can set the default location using the map as well by clicking on “**Set latitude, longitude and zoom level on map**” option available on the right-hand corner.
- By clicking on it, the map will open in new window. You can set the location by moving the icon as shown in below screenshot.



### Default Limits

Distance Unit

Miles

Direction

Shortest time

### Heat Map Settings

High

Medium

Low

### General

Enable Live Traffic

Optimize Route

Enable User Tracking

Save

Cancel

Configure Languages

- Set “Default Limits” for distance unit and direction. Distance unit can be in Kilometers or Miles and Direction can be Shortest Time or Shortest Distance.
- You can also set colors for ‘Heat Map’ configuration which would indicate the intensity of the data. *i.e.* **High**, **Medium** and **Low**.
- A user can also enable/disable **Live traffic** on Bing Maps and **Optimize** the route using SPF (Shortest Path First) feature from the configuration.
- A user can enable/disable **Live User tracking** feature from configuration to track users.

## Configure Languages

- You can also configure language of your choice by clicking on **Configure Languages** button available on Setup page.

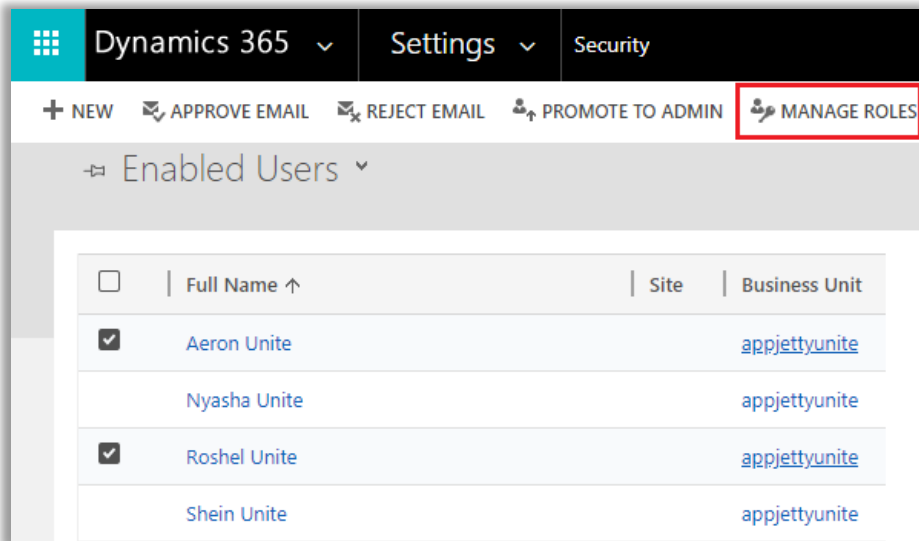


Language Configuration	
	English - United States
Map	Mapa
Directions	Direcciones
Definitions	Definiciones
Locations	Ubicaciones
Configuration	Configuración
Search	Buscar
Clear	Claro

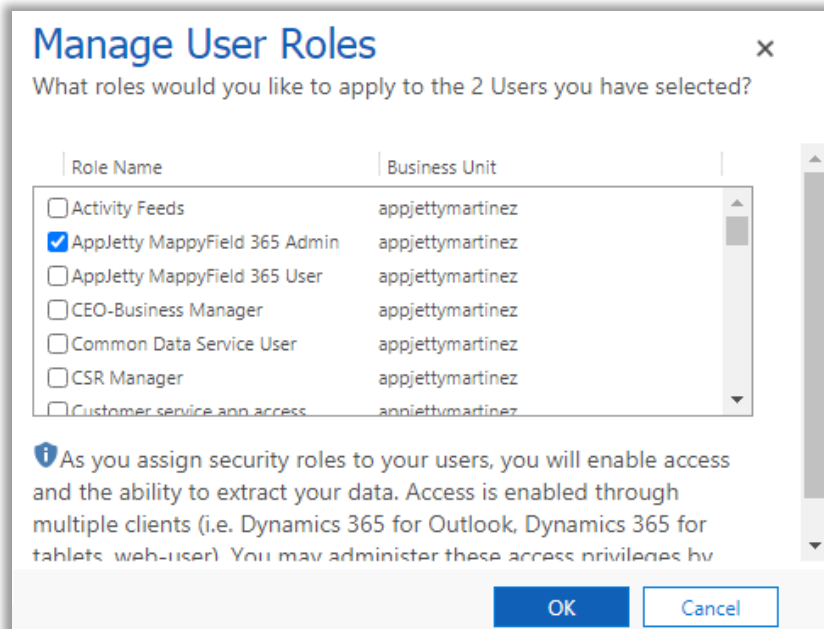
- Select the language from dropdown that you wish to configure your messages.
- Here, user needs to add translations themselves for the messages in the language of their choice.
- Click on save button to save the language translations.
- Note:** To configure languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be configured for the MappyField 365.

## Assign User Role

- To manage the user roles, navigate to **Settings -> Security -> Users**.



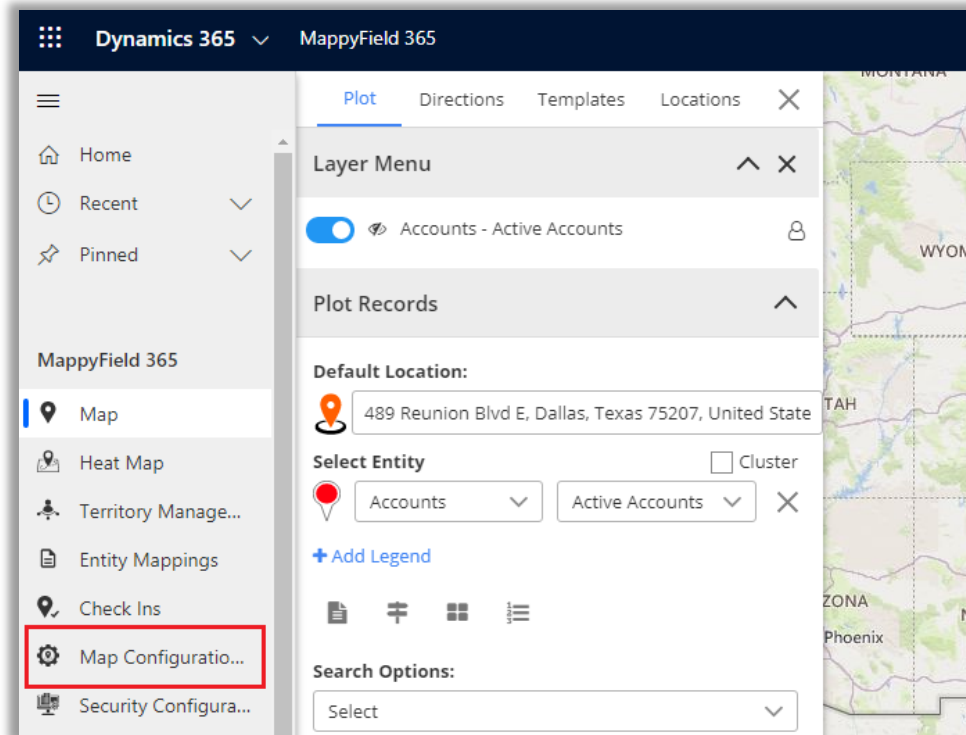
- Now select the users whose roles are to be managed and click on 'MANAGE ROLES.'
- This will open a pop up to select roles.



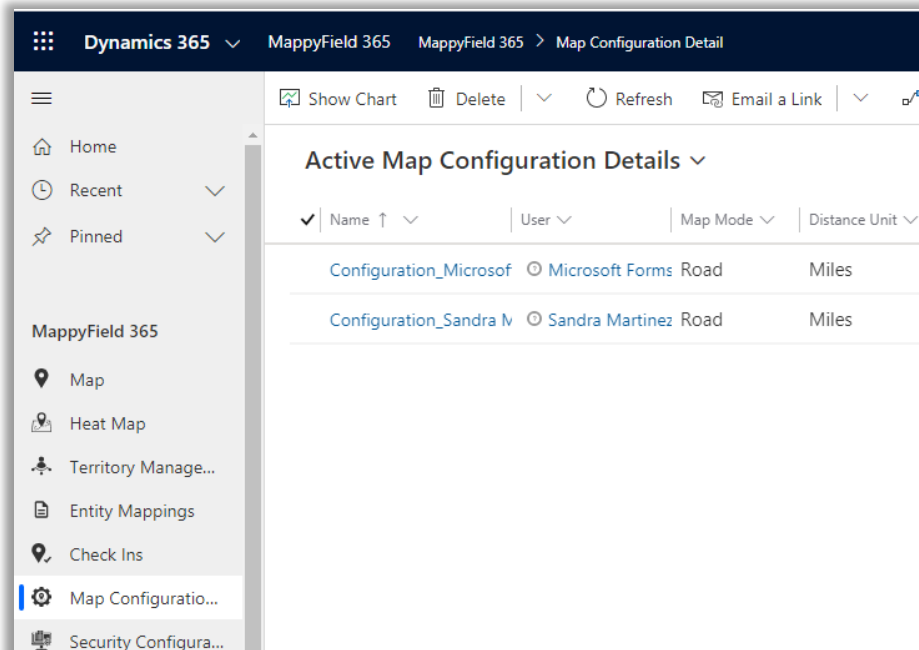
- The available roles for selection are **AppJetty MappyField 365 Admin** or **AppJetty MappyField 365 User** role.
- User with AppJetty MappyField 365 **Admin** role can perform all the actions like **System administrator** while user with AppJetty MappyField 365 User role can do all actions except **delete** actions.

## User Wise Map Configuration

- On assignment of any role like AppJetty MappyField 365 Admin, AppJetty MappyField 365 User or System Administrator role, configuration settings record must be created. This can be accessed by navigating to **Map Configuration**.



- On navigating to **MappyField 365 Configuration**, it would show list of all the users with MappyField 365 role or System Administrator.





**Note:** These configurations are default user-based configurations that will be set as default when map is loaded.

- Following are the configurations:
  - **Map Mode:** User can select default map mode. It can be road or aerial mode.
  - **Zoom Level:** User can set default zoom level for the map. It can also be managed based on settings made from the contextual menu.
  - **Plot Data:** Default plotting of data can be defined. Either it can be in cluster or non-cluster format.

MAP CONFIGURATION DETAIL : INFORMATION

Configuration\_Nyasha Unite

General

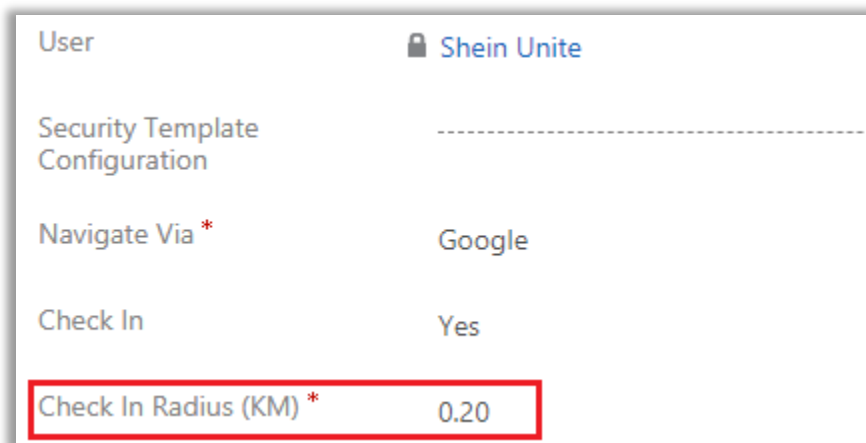
Name *	Configuration_Nyasha Unite	Owner *	Shein Unite
--------	----------------------------	---------	-------------

Defaults

Map Mode *	Road	Along The Route Distance	
Zoom Level	5	Along The Route Distance Unit	Miles
Map Center	23,72	User	Nyasha Unite
Plot Data *	Non Cluster	Security Template Configuration	Sales Reps
Distance Unit *	Miles	Navigate Via *	Google
Route Option *	Shortest Time	Check In	No
Default Location			
Default Origin			
Default Destination			

- **Distance Unit:** Default option for distance measuring. Either miles or kilometers.
- **Route Options:** You can define best way to determine route from this feature.
- **Default Location:** The user can define the default location using this option.
- **Default Origin:** The user can define the default origin using this option. It can also be managed based on settings made from the contextual menu.
- **Default Destination:** The user can define the default destination using this option. It can also be managed based on settings made from the contextual menu.
- **Along the route distance:** Define radius of along the route search.
- **Along the route distance unit:** Define default unit for along the route search.

- **Security Template Configuration:** Define the default Security Template for the user if required.  
**Note:** Here the list of the Templates will appear as per the **Security Template Configurations**.
- **Navigate via:** Select navigate to check the routes by using Google Maps, Waze Map or Apple Map.
- **Check In:** Enable or disable the 'Check In' module. If you enable the **Check In, Check In Radius (KM)**, the option will get enabled.
- **Check in Radius:** Define Geo Radius that can be allowed to perform any check in.



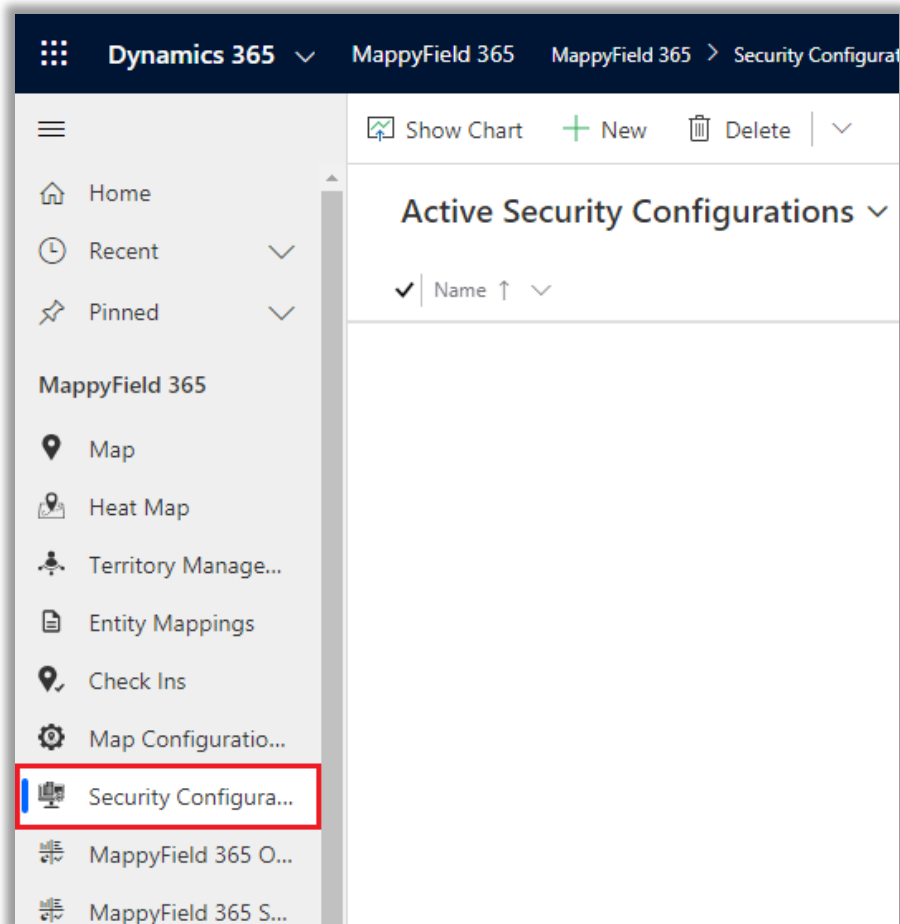
The screenshot shows a user configuration form for 'Shein Unite'. The form includes the following fields:

User	
Shein Unite	
Security Template Configuration	
Navigate Via *	Google
Check In	Yes
Check In Radius (KM) *	0.20

The 'Check In Radius (KM) \*' field is highlighted with a red border.

## Security Template Configuration

- Only **System administrator** or **User** with **AppJetty MappyField 365 Admin** role can create Security Template for other CRM users with AppJetty MappyField 365 User role.
- User admin can assign selected actions to different users using security templates.
- To create a 'security template', navigate to **AppJetty -> Security Template Configuration**.
- Click on **+ New** button from the action ribbon and enter template name and select all the actions that you want to make available for users with that template.



SECURITY CONFIGURATION : INFORMATION

General Template

◀ Action Configuration

Infobox Actions

Select All Actions	<input type="checkbox"/>	Proximity Search	<input checked="" type="checkbox"/>
Add To Origin	<input checked="" type="checkbox"/>	Related Records	<input checked="" type="checkbox"/>
Add To Destination	<input checked="" type="checkbox"/>	Point Of Interest	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>	Delete Record	<input type="checkbox"/>
Assign Owner	<input type="checkbox"/>	Add Task	<input checked="" type="checkbox"/>
Add To Marketing List	<input checked="" type="checkbox"/>	Add Appointment	<input checked="" type="checkbox"/>

Bulk Actions

Select All Bulk Actions	<input type="checkbox"/>	Copy Records	<input type="checkbox"/>
Add To Route	<input checked="" type="checkbox"/>	Export To Excel	<input checked="" type="checkbox"/>
Assign Owner	<input type="checkbox"/>	Export To PDF	<input checked="" type="checkbox"/>
Add Task	<input checked="" type="checkbox"/>	Print Records	<input checked="" type="checkbox"/>
Add Appointment	<input checked="" type="checkbox"/>	Add To Marketing List	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>	Point Of Interest	<input checked="" type="checkbox"/>
Territory Management	<input type="checkbox"/>	Category	<input checked="" type="checkbox"/>
Summary Card	<input checked="" type="checkbox"/>		

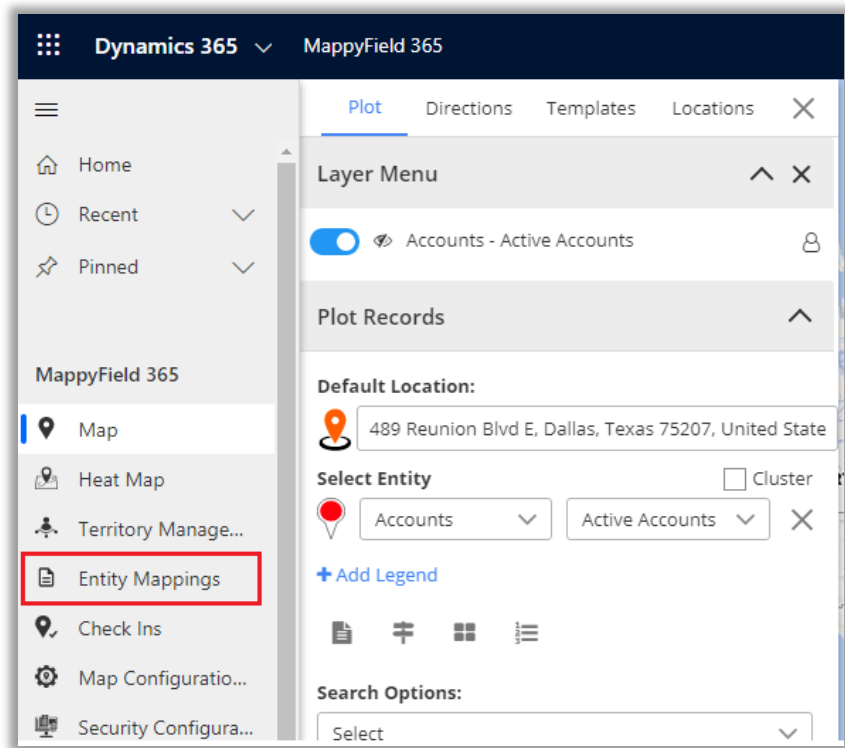
Active

Click on **Save**  icon. Upon saving, it would enable Configuration Details section from where you can directly assign that template to a user.

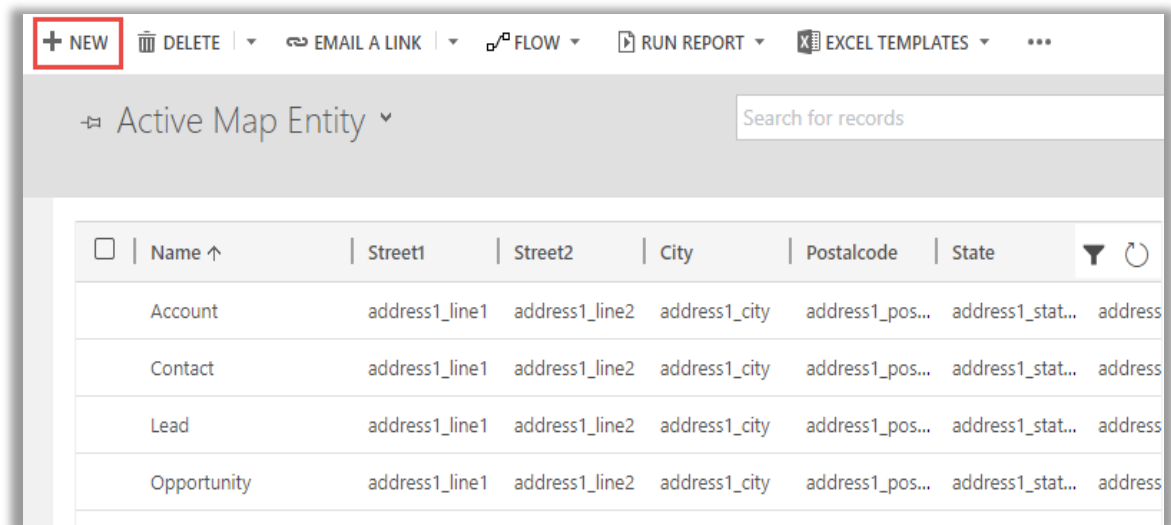
[illegible]

# Entity Mappings

- Navigate to **AppJetty -> Entity Mappings** to display the entity with its relevant details on the MappyField 365. From here you can add a new entity and configure its required details.



- By clicking on Entity Mapping, the list of entities can be seen which are already mapped.



- Click on “**New**” button, this will open a new window for mapping an entity.

- **Entity Name:** Select the entity you want to map. You can choose from all the entities that are present in the CRM by default or the custom entities created by you.
- **Link To:** Check the link to option to link the selected entity to some other entity. After checking the box, you will get a list of relationships with which you can link the selected entity.

### Entity to Map

#### General

<b>Entity Name*</b>	Account	<b>Link To</b>	<input type="checkbox"/>
<b>Total Records</b>	101	<b>Geocoded Records</b>	101

#### Address Fields

<b>Street 1*</b>	Address 1: Street 1	<b>State/Province*</b>	Address 1: State/Province
<b>Street 2*</b>	Address 1: Street 2	<b>Postal Code*</b>	Address 1: ZIP/Postal Code
<b>City*</b>	Address 1: City	<b>Country*</b>	Address 1: Country/Region
<b>Latitude*</b>	Address 1: Latitude	<b>Longitude*</b>	Address 1: Longitude

**Automatically Geocode New Records** ☒

#### Attributes

<b>Detail Attributes</b>	7 selected
<b>Category Attributes</b>	All selected (157)

- Activity Entities work only on **Account**, **Contact** or **Lead** addresses marked as regarding address.
- **Total Records:** It displays how many records the entity contains.
- **Geocoded Records:** It displays how many records are geocoded.
- **Address Fields:** Select the address fields for the entity, to be used for geocoding. By default, it will consider map's certain address fields. If needed they can be changed.
- **Automatically Geocode New Records:** If it is checked, it geocodes the record automatically as per saving configuration.
- Once you have filled all details, click on "Save" button. Entity will be mapped, and success/failure message will be displayed.

Attributes

Attributes


---

Detail Attributes

7 selected ▼

Category Attributes

All selected (157) ▼


- For mapped entities, further configurations can be managed like **Attributes**. It includes **Detail Attributes** and **Category Attributes**.
- ‘Detail attributes’ are the ones that appear on card upon clicking on ‘pushpin pointer’ . At max 10 attributes can be selected.
- ‘Category attributes’ are the ones that appear in dropdown for ‘category’ selection. You can select as many attributes as you want for category selection.


Action Configuration

- For mapped entities, you can edit action configuration section where you can check/uncheck the action buttons according to your requirement.
- This will reflect on the tooltip card. Here, only those action buttons will be shown that can be changed. Default buttons will not be shown in this configuration section.

Actions Configuration

---

☒  **Activate Record**

☒  **Deactivate Record**

## Data Grid Attributes

- From here, you can select the attributes for the **data grid**. When you plot any data in map *or* in heat map, grid data will be displayed according to attributes selected here.
- If 'Display Full Address' checkbox is checked in data grid, it will display records with full address.
- You can select maximum 8 data grid attributes.

☒ **Display full address**

Attribute\*
--

Display Name\*

Add

Attribute	Display Name	Action
Account Name	Account Name	
Owner	Owner	×
Address 1: Latitude	Address 1: Latitude	×
Address 2	Address 2	×
Description	Description	×
Address 1: City	Address 1: City	×
Address 1: Country/Region	Address 1: Country/Region	×
Account Number	Account Number	×

## Summary Card Configuration

- You can make configurations related to what you want to display on summary card.
- For summary card of an entity, you can choose the attributes that you want from the dropdown list.
- Also, under aggregate method, you can define the way you want records to be summarized. It can be either sum or average. Also, you may define display name of that attribute.
- By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.

Attribute\*
--

Aggregate Method
Sum

Display Name\*

Add

Attribute	Display Name	Aggregate Method	Action
Number of Employees	Number of Employees	Sum	×
Annual Revenue	Annual Revenue	Sum	×



## Views Configuration

- You can select the view that you want to display on the map for particular entity.

Views Configuration

☒ **Views**

☒ My Active Accounts  
☒ Active Accounts  
☒ Inactive Accounts  
☒ Selected Accounts Campaigns  
☒ Service Account  
☒ Accounts I Follow  
☒ Accounts Being Followed  
☒ Customers  
☒ Vendors  
☒ Accounts: Responded to Campaigns in Last 6 Months  
☒ All Accounts  
☒ My Connections  
☒ Accounts: No Orders in Last 6 Months  
☒ All Accounts (not available)  
☒ Accounts: Influenced Deals That We Won  
☒ Accounts: No Campaign Activities in Last 3 Months  
☒ Excluded Accounts Campaigns

**View Type**  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View  
System View

## Relationship Configuration

- The selected relationship id from the Relation List and the name gets plotted as part of related records associated with a record.
- In 'Relationship Configuration', Default Relationship 'radio button' is given to display the Default relationship at the time of loading the record map.

Relationship Configuration

<input type="checkbox"/>	Relationship List	Relation Schema	Relationship Id	Default Relationship ?
<input type="checkbox"/>	account - customerrelationship	account_customer_relationship_customer	customerid	<input type="radio"/>
<input type="checkbox"/>	account - userentityinstancedata	userentityinstancedata_account	objectid	<input type="radio"/>
<input type="checkbox"/>	account - socialactivity	SocialActivity_PostAuthorAccount_accounts	postauthoraccount	<input type="radio"/>
<input type="checkbox"/>	account - duplicaterecord	Account_DuplicateBaseRecord	baserecordid	<input type="radio"/>
<input type="checkbox"/>	account - socialactivity	SocialActivity_PostAuthor_accounts	postauthor	<input type="radio"/>
<input type="checkbox"/>	account - syncerror	Account_SyncErrors	regardingobjectid	<input type="radio"/>

Showing 1 to 114 of 114 entries

## Tooltip Attributes Configuration

Tooltip Attributes

Attribute\*

--

Display Name\*

Add

Attribute	Display Name	Action
Account Name	Account Name	
Owner	Owner	×

Update

- You can make configurations related to what you want to display on 'tool tip' when anyone hovers on that record.
- For that, you can choose the attributes that you want from the dropdown list. You may also define display name of that attribute. By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.
- After making all the configurations, click on Update button to complete the process.

## Enable Check-In

- You will get Check-In & Check Out options for all activity entities along with **Add Notes** and **Attachment** options.
- To enable the **Check In** option for the activities like etc., tick the **Enable Check In** option.

Entity to Map

General

Entity Name\*

Appointment

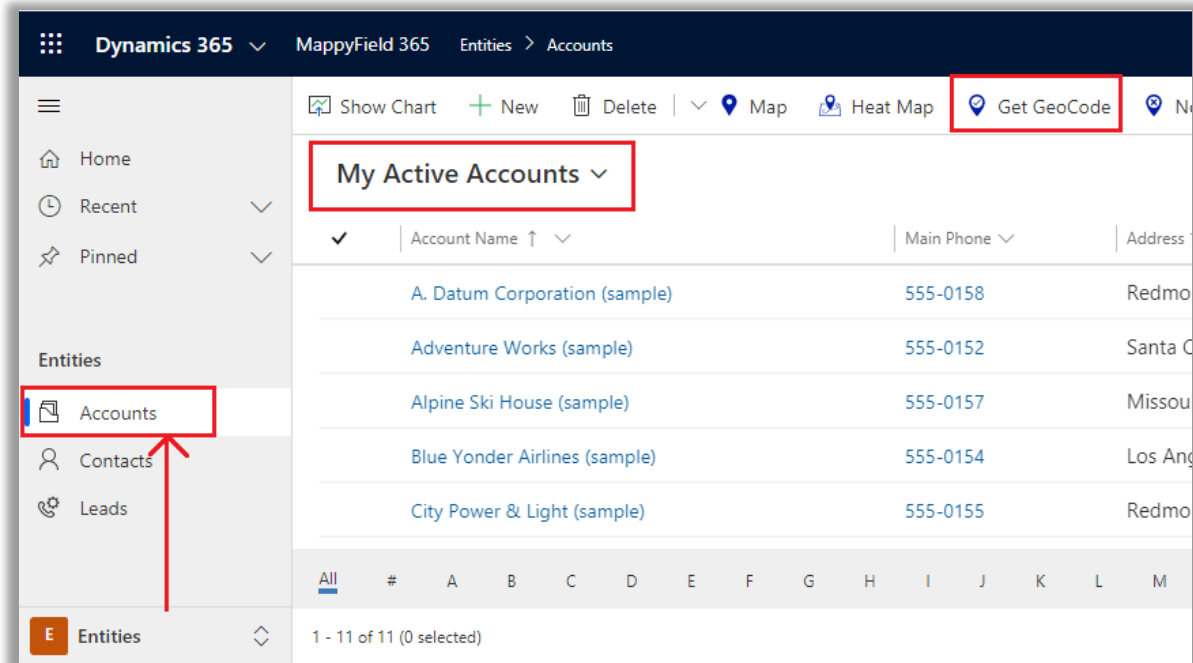
Enable Check In ☒

- By checking it, you will get the **Check-In & Check-Out** features for your activity.

## Geocode Records

### Manually Geocode the Record

- Navigate to the record for which you want to manually set a geocode: Latitude & Longitude.



- You will get the Geocode as per your selection of view. Here you get the Geocode for “My Active Accounts”. If you have not selected any record, it will get Geocode for all the Records.

**Ex.** If you want to geocode any record of account, go to **Sales -> Accounts** and select a record.

ACCOUNT

A. Datum Corporation

Summary

ACCOUNT INFORMATION

Account Name \* A. Datum Corporation (sample)

Phone 555-0158

Email someone9@example.com

Fax

Website http://www.adatum.com/

Parent Account

Ticker Symbol

Address 1: Latitude 40.60443

Address 1: Longitude -79.18019

Geo Confidence Medium

- After selecting a record and clicking on **Get Geocode**, the “Latitude” & “Longitude” will get updated as per the address details.
- If you check, the account details, the Geocode: Latitude & Longitude is updated as shown in the screenshot.

**Note:** You get option to geocode records only when that particular entity is **mapped** from Entity Mappings configuration.

+ NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE FORM GET GEOCODE

ACCOUNT

Blue Yonder Airlines (sample)

Annual Revenue US\$10,000

9068 Muir Road  
Los Angeles, KA 20593  
U.S.

Street 1 9068 Muir Road

Street 2

Street 3

City Los Angeles

State/Province KA

ZIP/Postal Code 20593

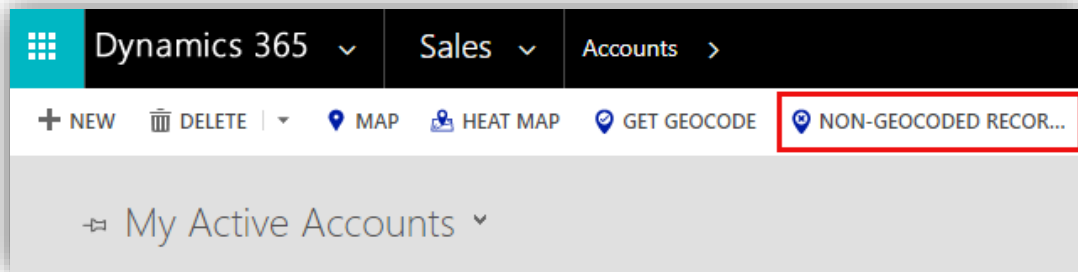
Country/Region U.S.


Done

- If you changed the address, then you need to manually geocode that record by clicking on the “Get Geocode” button from the menu.

## Non-Geocoded Records

- Navigate to the entity for which you want to get a non-geocode detail.
- For example, if you want to check the Non-Geo Coded records from the multiple records of an account entity, go to **Sales -> Account**.



- Click on **Non-Geocoded Record** button, it would show listing of all the non-geocoded records along with their address.
- You can also view details of the record by clicking on view icon  under action column.

Non-Geocoded Records

Copy

Excel

PDF

Print

Search:

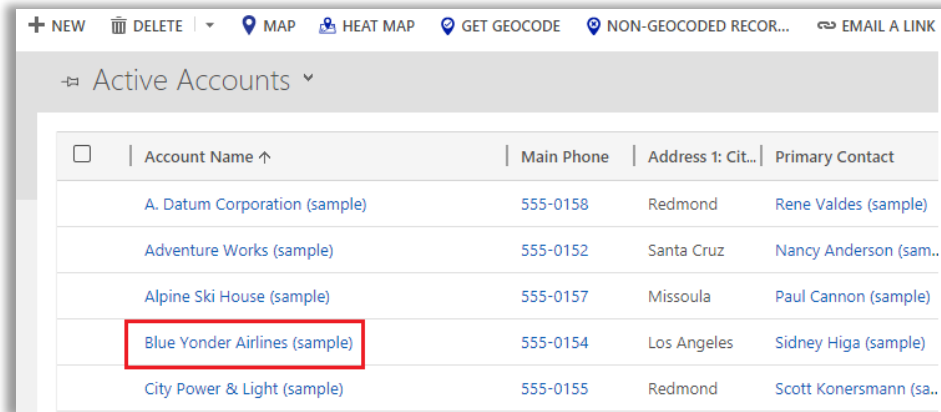
Full Name	Address	Action
Avie Norgate	82067 Independence Junction Pas Pul	
Boot Moralas	90434 Washington Terrace Ordos	
Dorie Beckles	04 Schurz Parkway Hengfan	
Eleanora Jervoise	540 Carey Lane Putun	
Flem Humpherson	0657 Longview Place Krajan Kedungsalam	
Gawain Moorman	571 Myrtle Avenue Olejet	
Nannie Fargher	2694 Pond Center Son Trà	
Pall Curl	405 Dwight Street Bojonggaling	

- For the list generated, you can also perform actions like **Copy, Excel, Pdf, Print** and **Search** as well.

## Individual Records on Map View

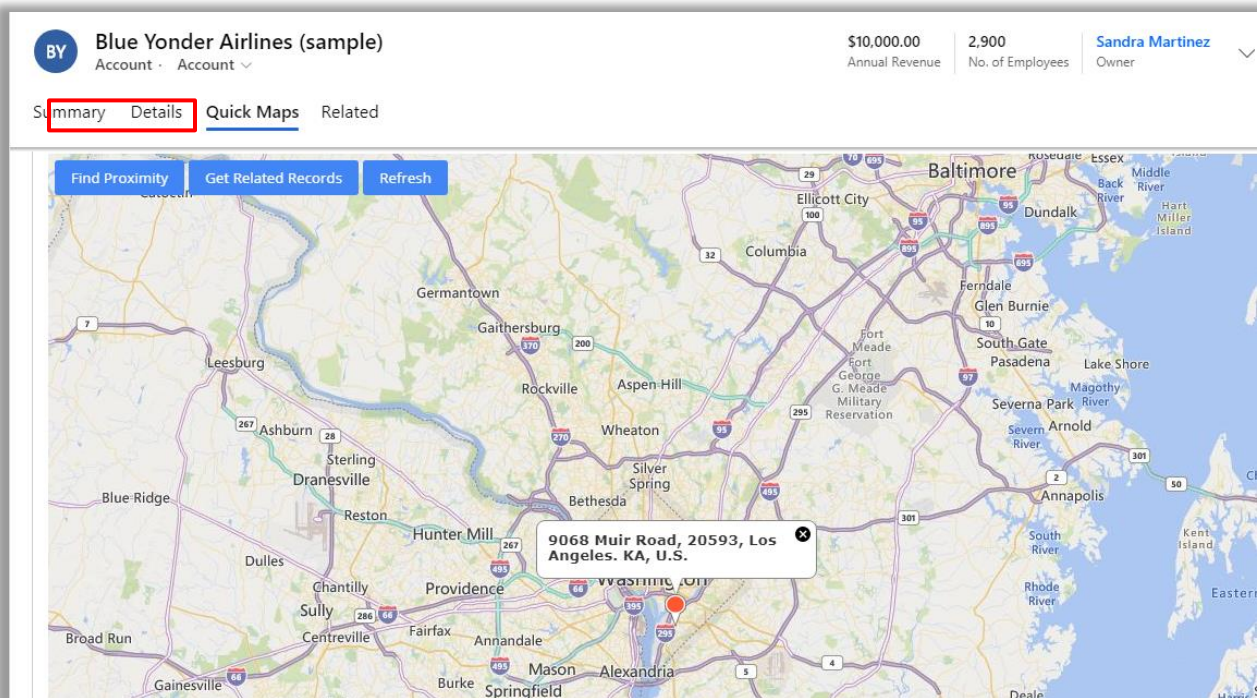
### MappyField 365 section in Record Details

- MappyField 365 is separately provided in the **Details** page of any record of all the mapped entities.
- Click on any record of account entity.



<input type="checkbox"/>	Account Name ↑	Main Phone	Address 1: Cit...	Primary Contact
	A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)
	Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sam..
	Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)
	Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)
	City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sa..

- By clicking on the account name, you will get the summary and the details of that account and by scrolling down, you will get the separate 'MappyField 365' section.




**Blue Yonder Airlines (sample)**  
Account - Account ▾

**\$10,000.00** Annual Revenue    **2,900** No. of Employees    **Sandra Martinez** Owner ▾

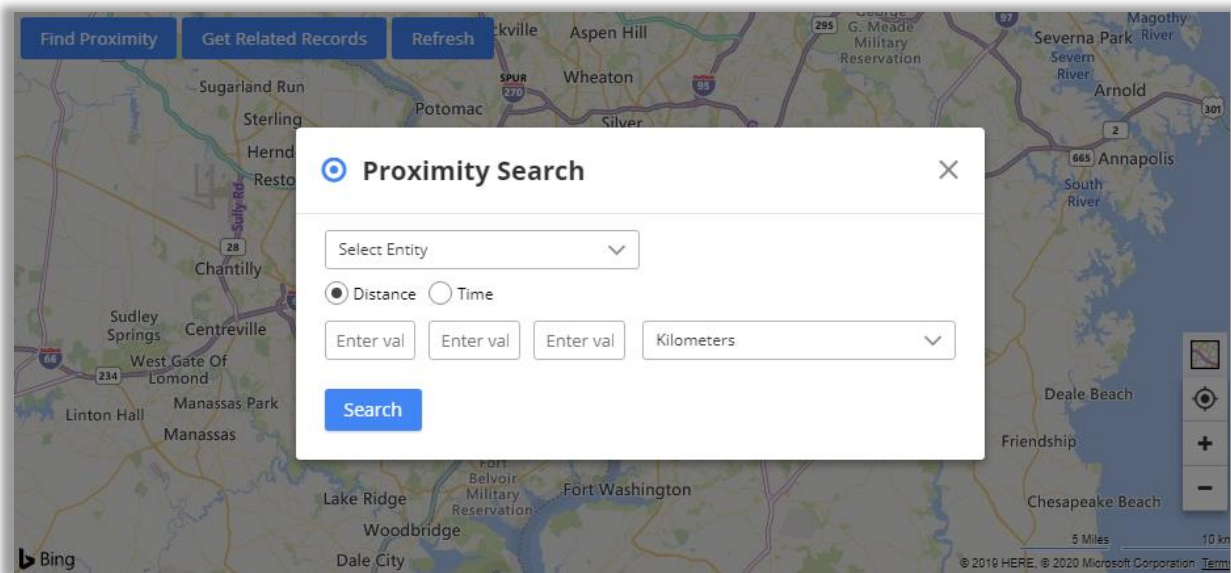
Summary **Details** Quick Maps Related

Find Proximity Get Related Records Refresh

9068 Muir Road, 20593, Los Angeles, CA, U.S.

- On map there is a pin  plotted based on the address entered for the record.
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving, it would prompt a confirmation message. Click **OK** to update and continue.



- You can update latitude and longitude using record map for records of Account, Contact and Lead Entities.
- Along with that there are three action buttons: **Proximity**, **Get Related Records** and **Refresh**.
- **Find Proximity**: Clicking on it, you can perform proximity search from that pin and find records nearby. It would show records based on entity selected from the dropdown.

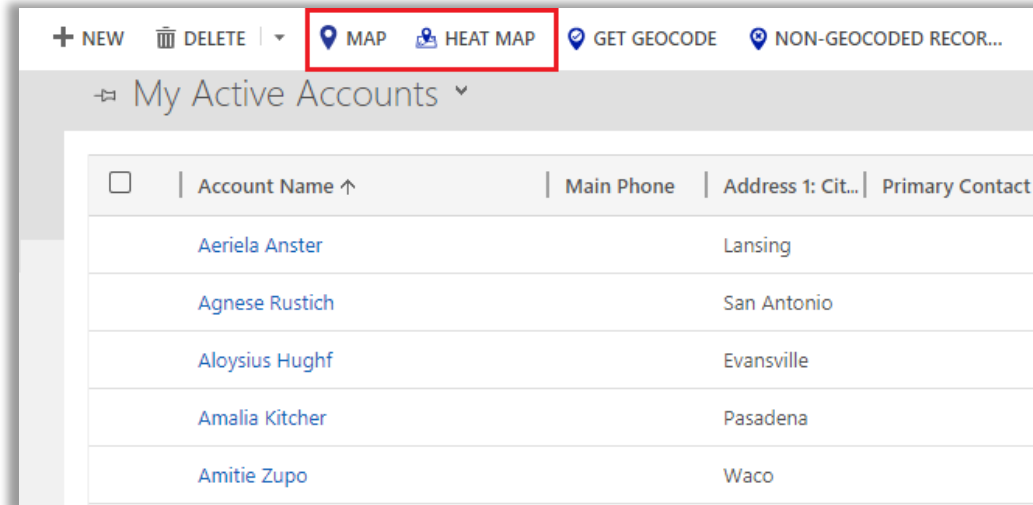


- **Get Related Records**: This action button would fetch all related records to the plotted pin based on relationship set from the configurations section.
- **Refresh**: This button would just refresh the map to default map type removing any action performed on map.

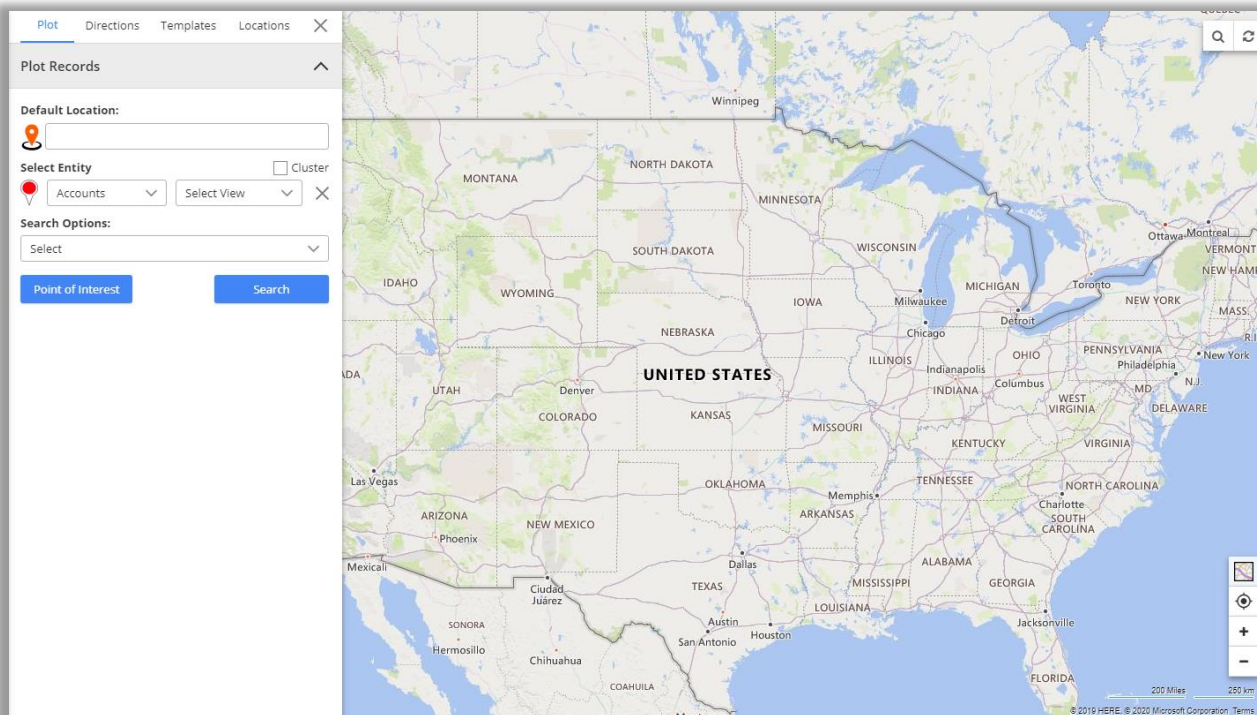


## View Map from Entity Menu

- The map options are provided in all the entities on the header.
- You can access the  **Map** and  **Heat Map** from the Entity.



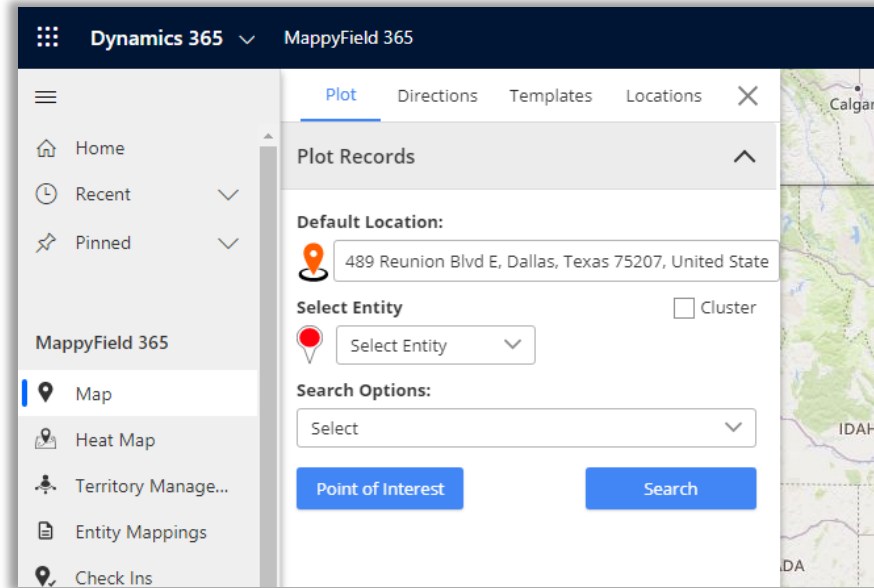
- By clicking on 'Map' or 'Heat Map', you will be redirected to the details of the Maps for that particular entity.



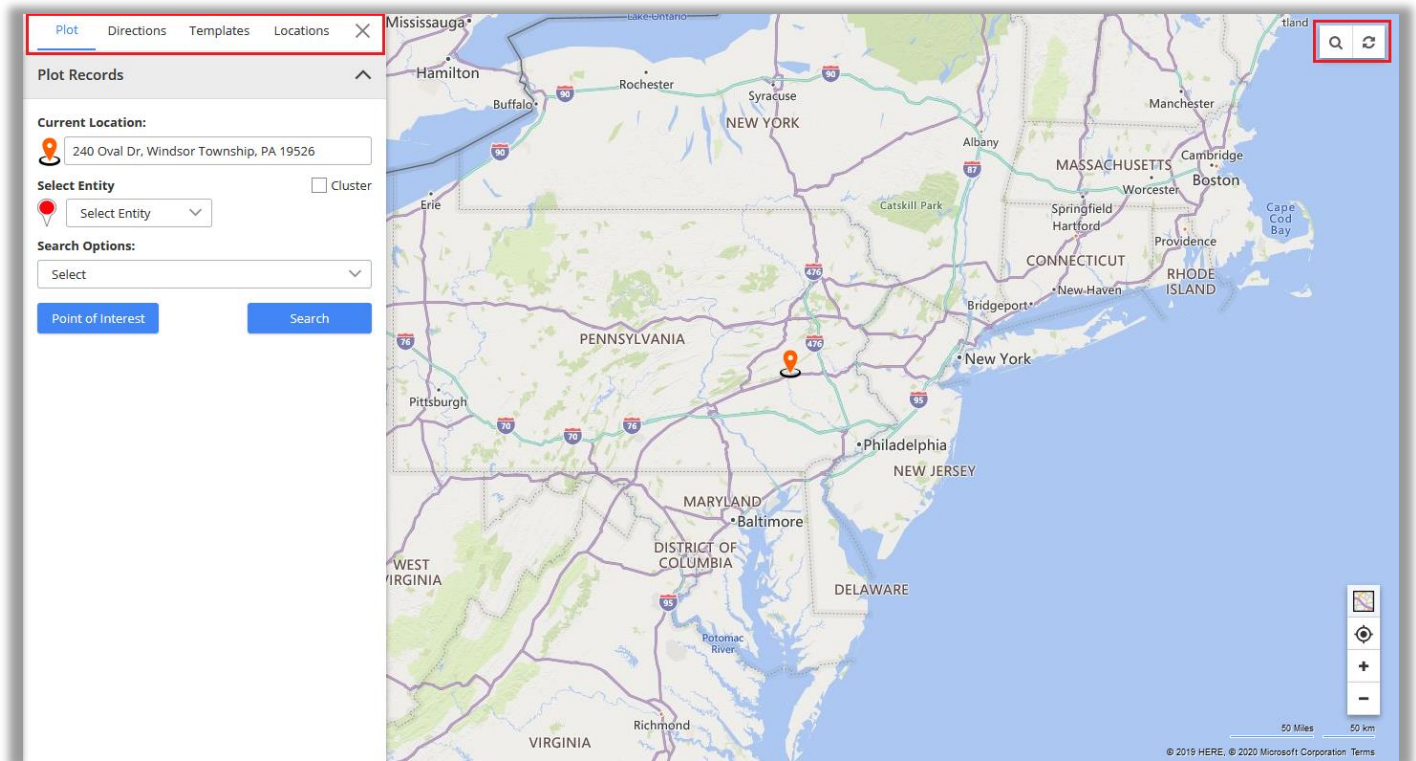


## Map View

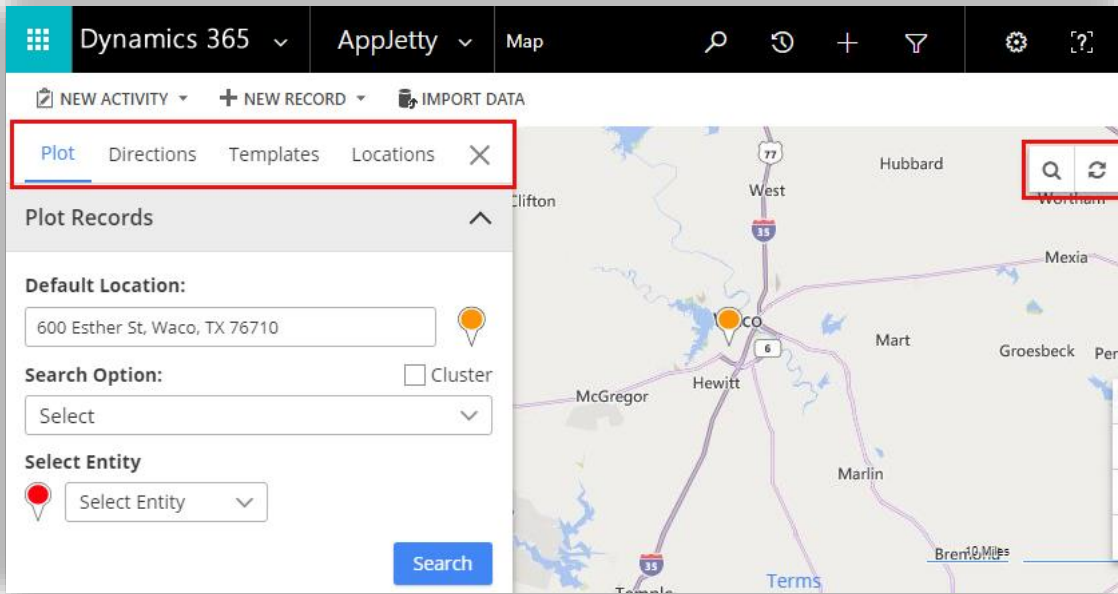
- Navigate to **Maps**. You can perform all the activities and search options from the Map view of MappyField 365.





- By clicking on **Map**, Map page will open with all default configurations and fill up with all the entities which are already configured in **Entity To Map**.



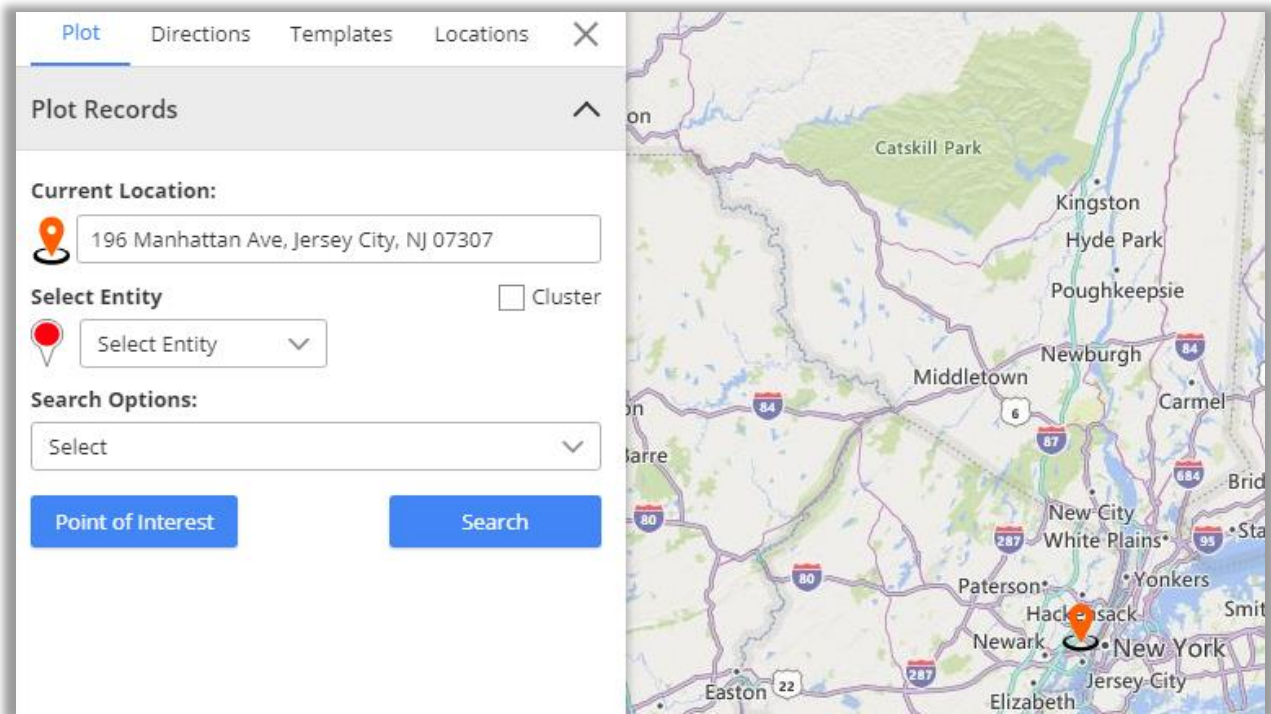
- Select  icon on the left to navigate to the map configurations page.



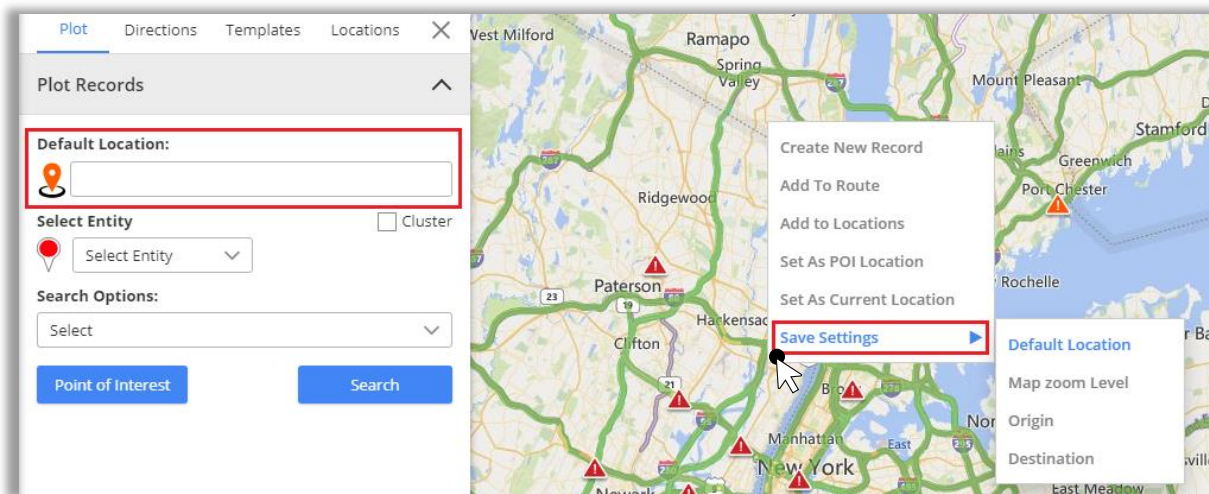
- You will have four Tabs to view the records by selecting the fields and options on MappyField 365.
  - Plot
  - Directions
  - Templates
  - Locations
- Along with these options, at the right-hand corner of the map, you will see two options: Search  and Refresh .
- By clicking on the **Search** icon, you can search the details.
- By clicking on the **Refresh** icon, you can refresh the details of the page.

### Default Location

- You will get the default location with the pin on the map as per the set up in **MappyField 365 Configuration** by User *or* as per the current location.




- You can set the default location from the Map by right-clicking on your location. As you right-click, the menu with options will appear.

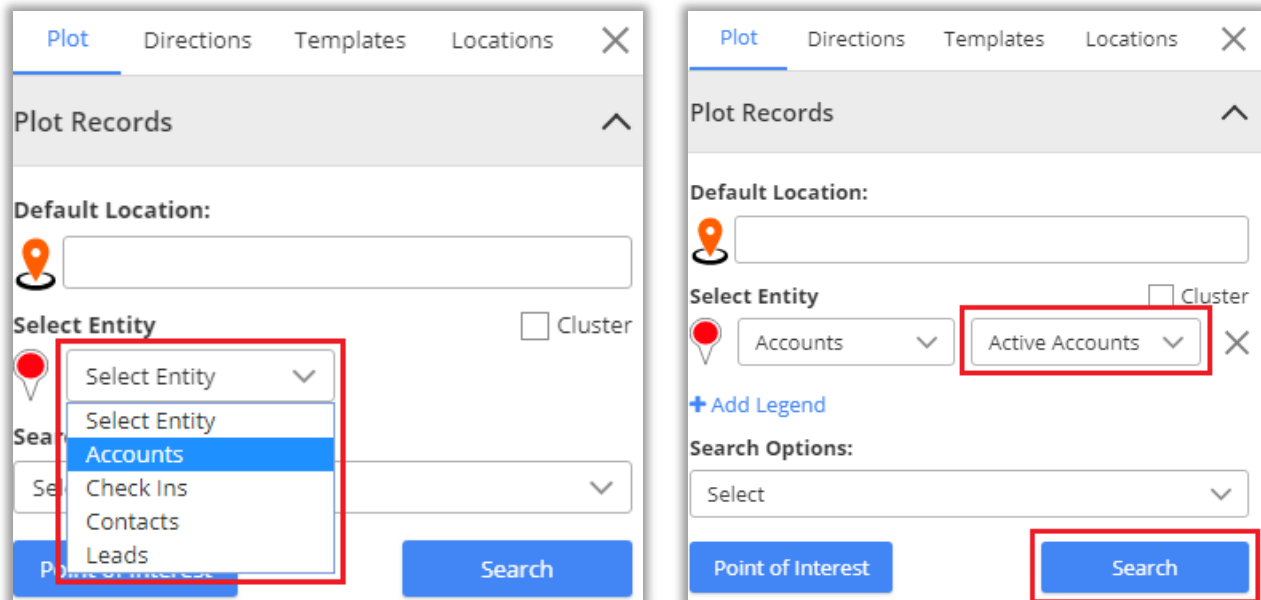


- Click on Save Settings -> **Default Location**. On clicking, the default location will be saved and as you refresh the page *or* when you open the map again, you will get the address of default location and see the **pin** on the map of default location.

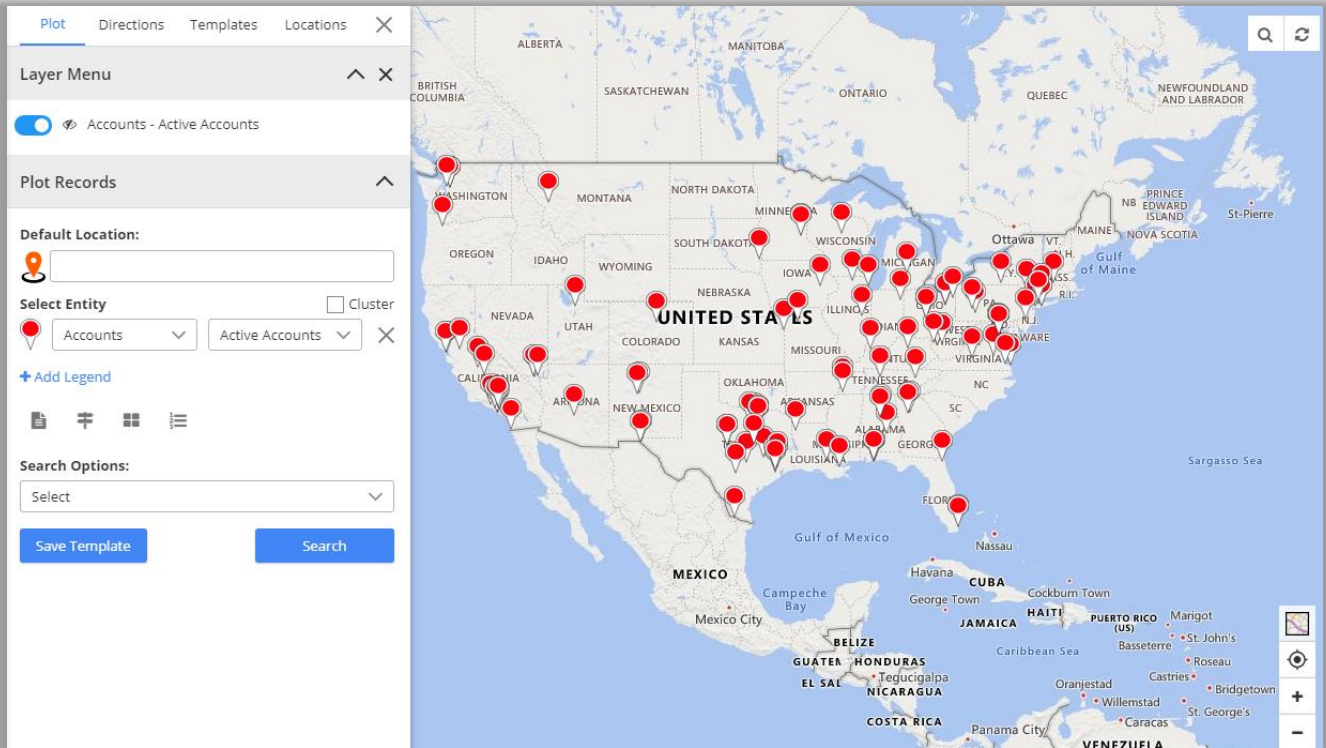
## Plot the records on Map

### Select Entity

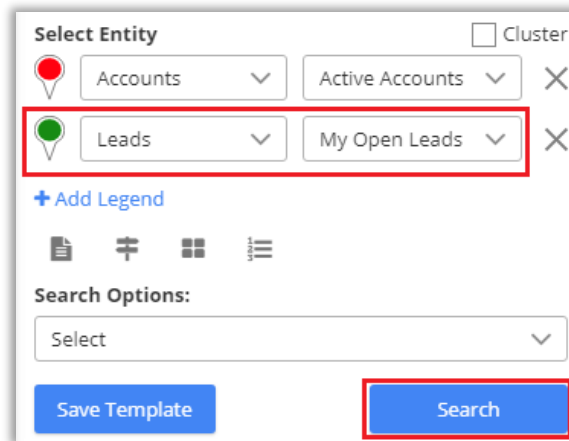
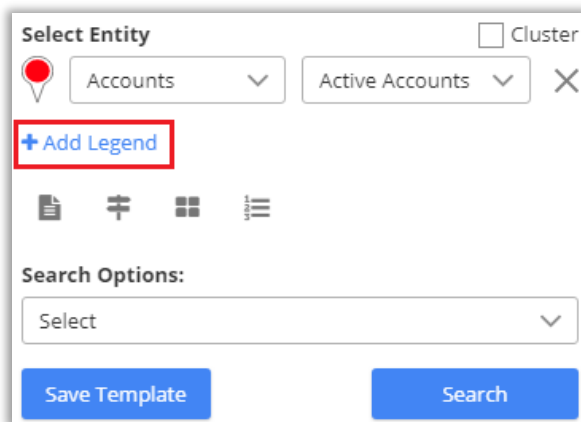
- First, select **Entity** from the dropdown option. You will get the dropdown list of entities as per mapped in  **Entity Mappings** configuration. (left image)



- After selection of **Entity** and its **View**, click on **Search** button to plot and view the records on map. (right image)
- Now, you can see all the Accounts are plotted on the Map.

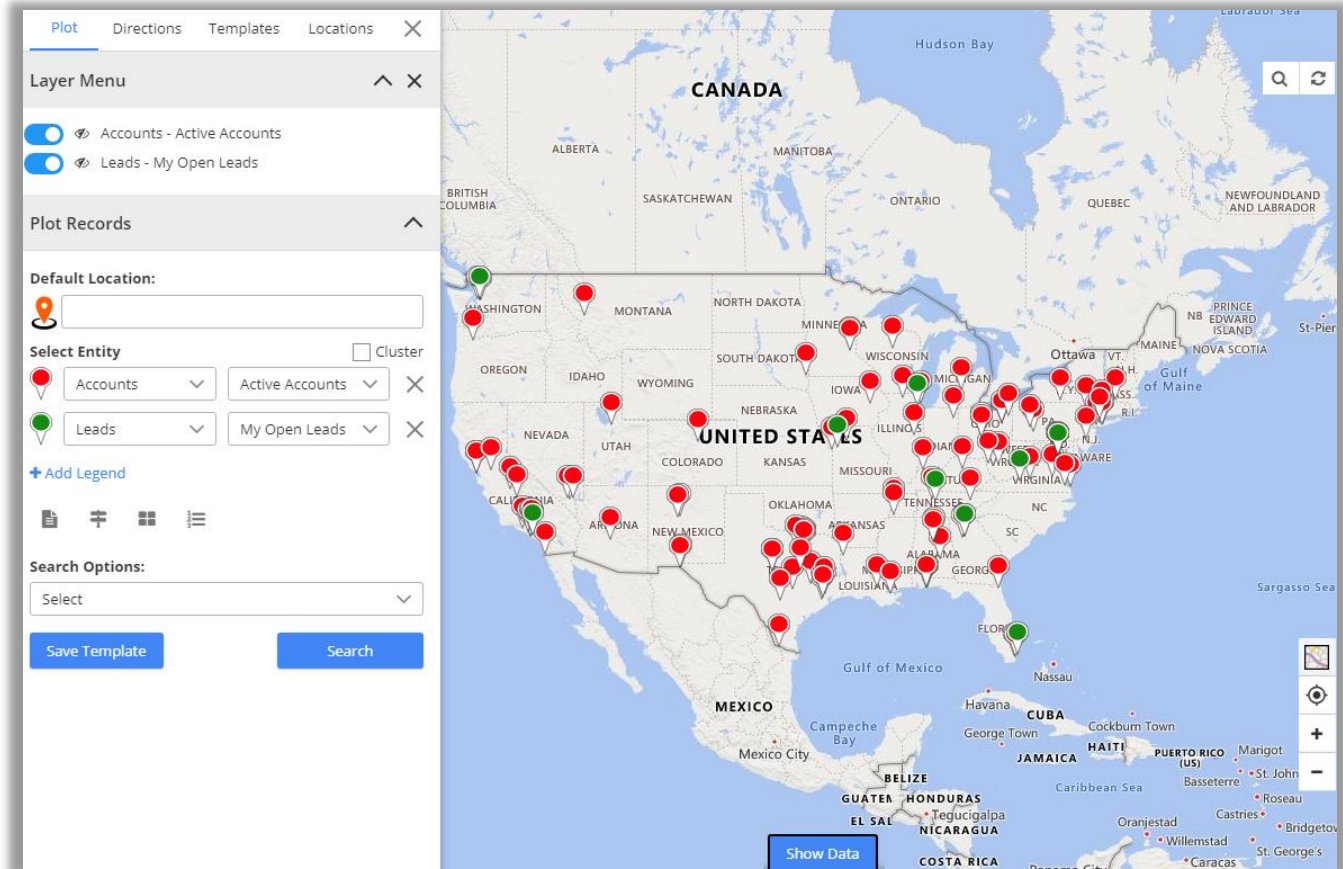






- The multiple Entities selection option is also given to plot and view the **multiple records** on the map.
- To select another Entity, click on **+ Add Legend** text caption. As you click on it, the “Select Entity” option will be added.




- Now, select another **Entity** and select its **View** then click on **Search** button.
- You can add maximum **5 Entities**.

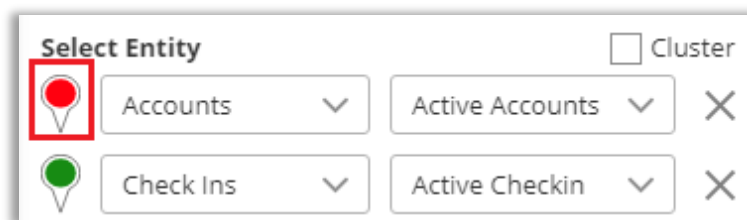





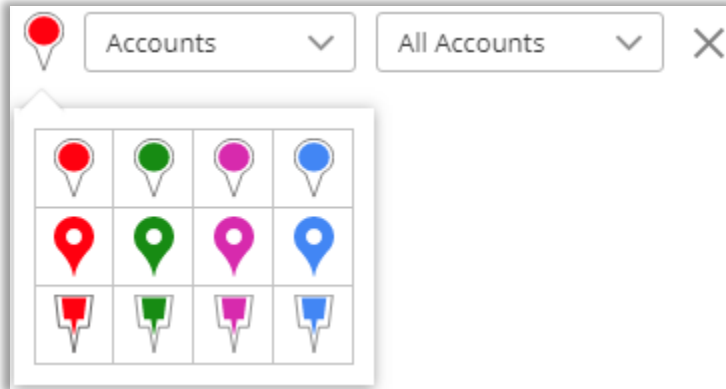
- On selection of more than one entity, pins with different colors   get plotted based on the records of entities. On map, Accounts are plotted in red pin  and Leads are plotted in green pin .
- If entities like Account, Contact or Lead are mapped, only then the records of activity entities will be plotted on the map.

### Pin selection for records

- Every time when you add a new entity the **pin** will be added with different color.
- Multiple pin  options are also available to differentiate multiple entity (legend) records, options will be listed by clicking on existing pin.



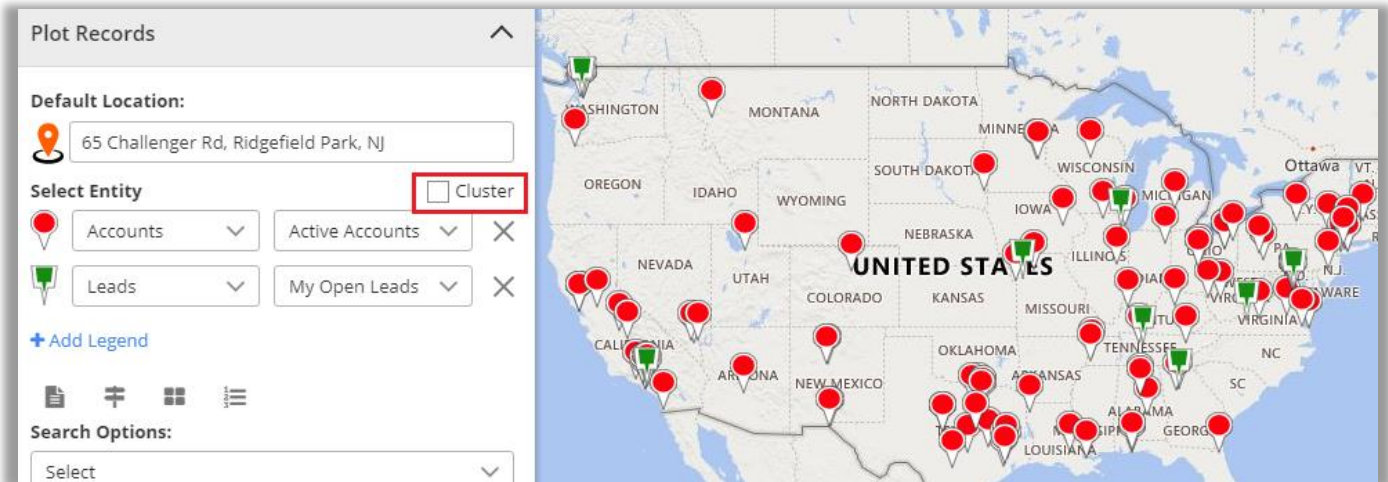
- You can change the pin **color** and its **shape** by clicking on the pin  of any entity.



- Select different pins for the multiple entities to differentiate the records on the map.

### Cluster Map Records

- For all the pins added on the map, there is an option available to **cluster** them.



- By ticking the **Cluster** option, the pins will get clustered based on the proximity. It will make a group of nearby pins indicating the number of markers.

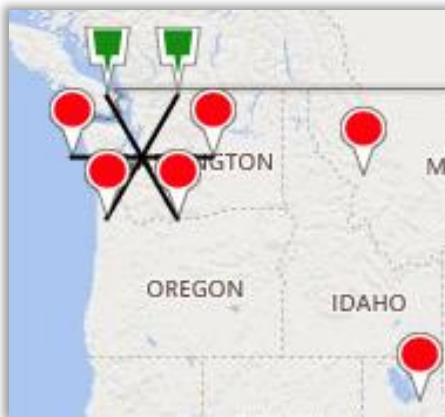



**Note:**

- On **zooming in** to the map, number of pins in the cluster **decreases** and you get to see individual markers on map. (left image)



- Whereas, when zoomed out, it consolidates the markers into clusters again. (right side image)

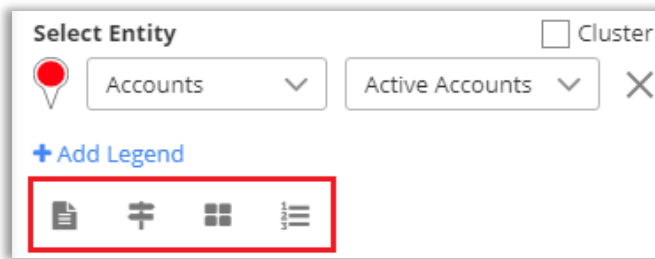


- On clicking any cluster (no. of groups), it will show all the pins in **spider cluster** form .



## Advance Options

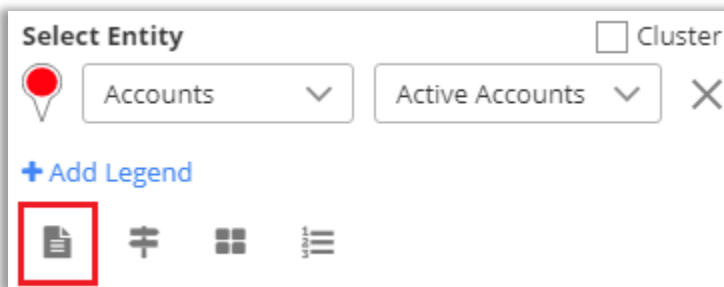
- Below the “Select Entity” option, there are four options are given related to records on the map.





- Marketing List
- Point of Interest
- Select Category (Category Search)
- Summary Card

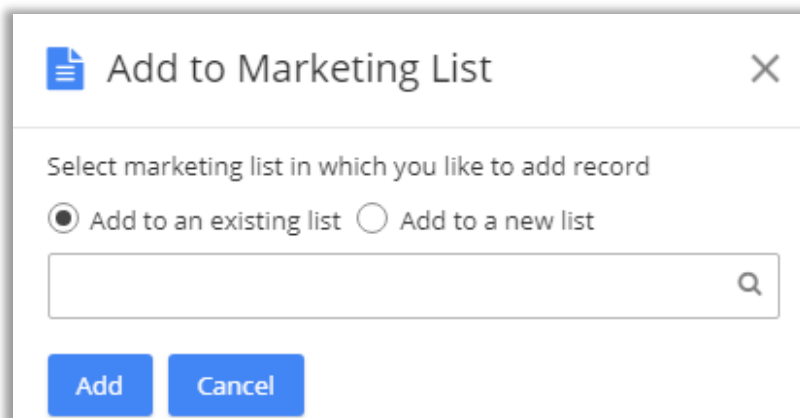
## Marketing List

- Marketing list contain the members like Account, Contact or Lead records. You can add the MappyField 365 data in any marketing list to market the specific segments more effectively.

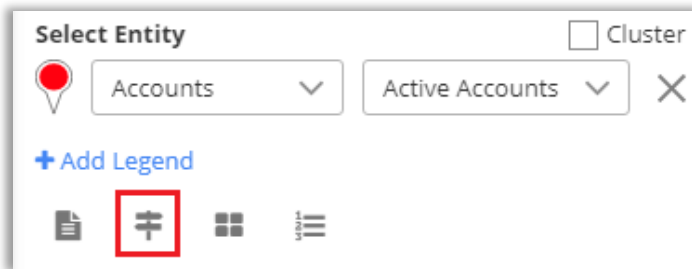


- By clicking on ‘Marketing List’ icon  under the “Select Entity” option, you will get the **Add to Marketing List** popup window.

- You can get the “Marketing List” by clicking on **Search** icon  if it has already been created in **Marketing -> Marketing List** or you can Add to a new list.

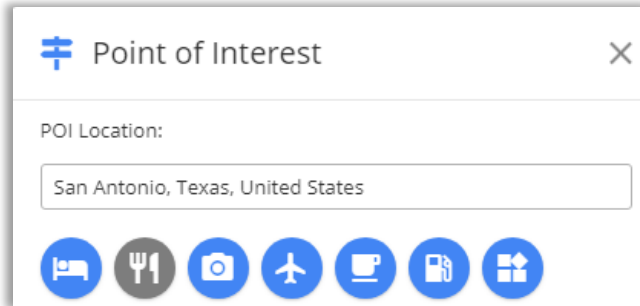
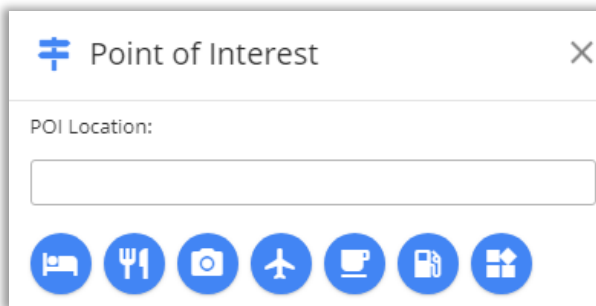


## Point of Interest (POI)

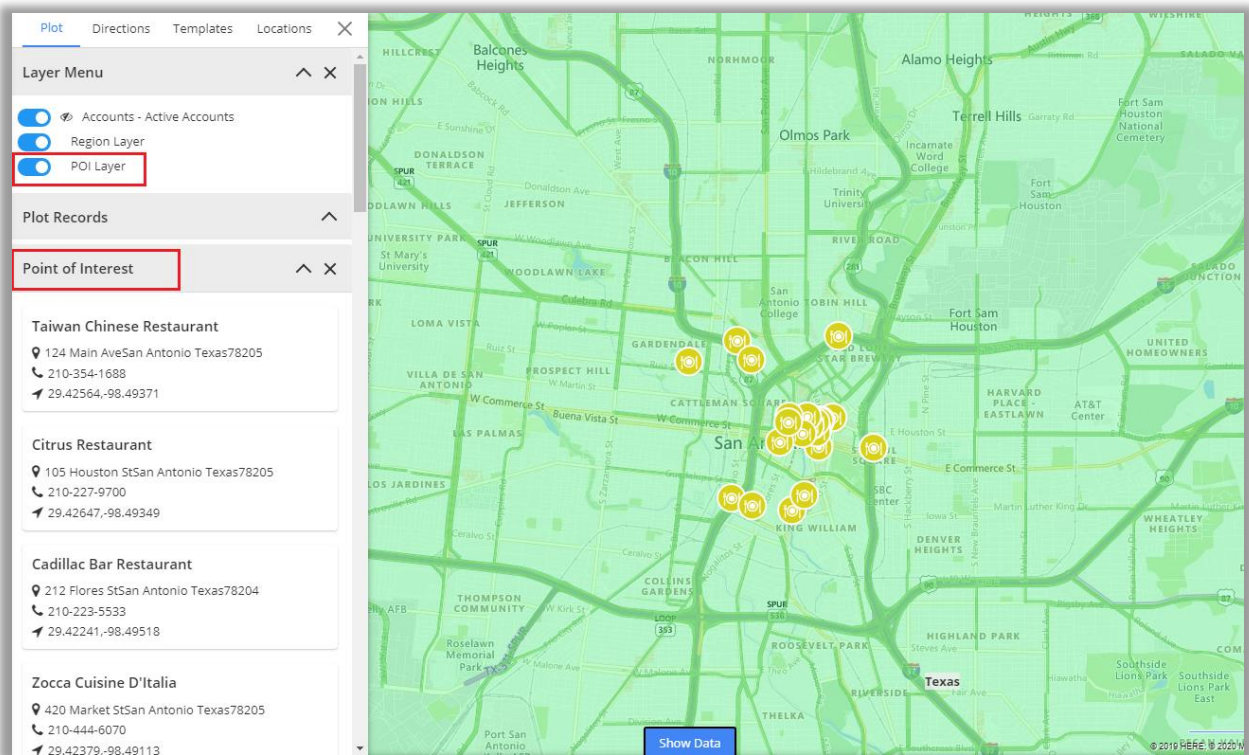


- If you want to search specific locations like restaurant, coffee shops, hotels, airport, gas station, etc. near the plotted records, click on **POI** icon.

- By clicking on the 'POI' icon you will get the **Point of Interest** popup window. (left screenshot)



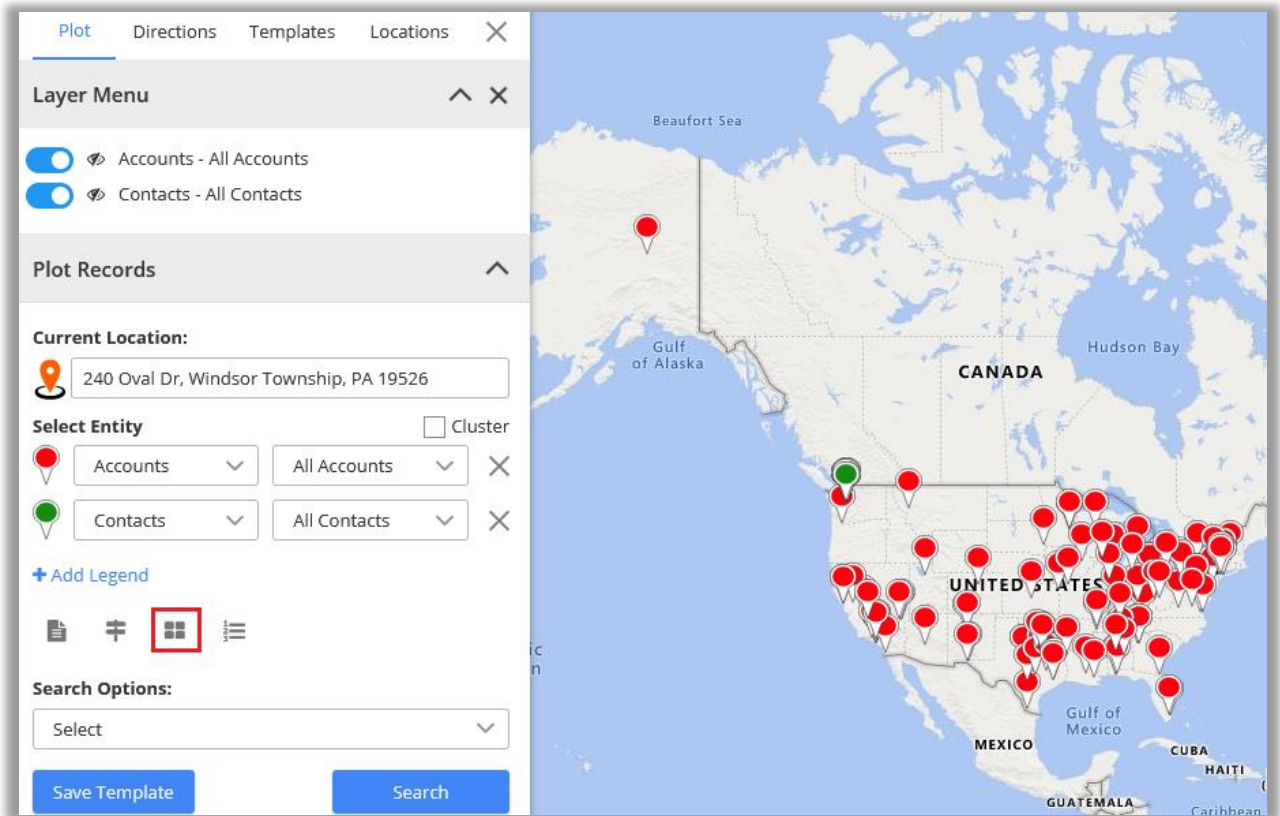
- Insert the Location. As you insert it, the autofill dropdown will appear. (right screenshot)
- After inserting the POI Location, click on location type. Suppose, by clicking on restaurant icon, the restaurant record will be plotted on the map based on the POI Location.



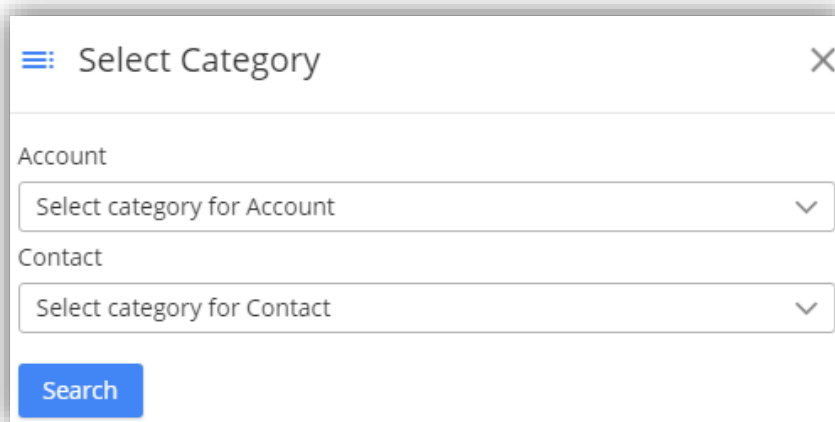
- From the left side panel, you will get the list under the Point of Interest with the details.

## Category Search

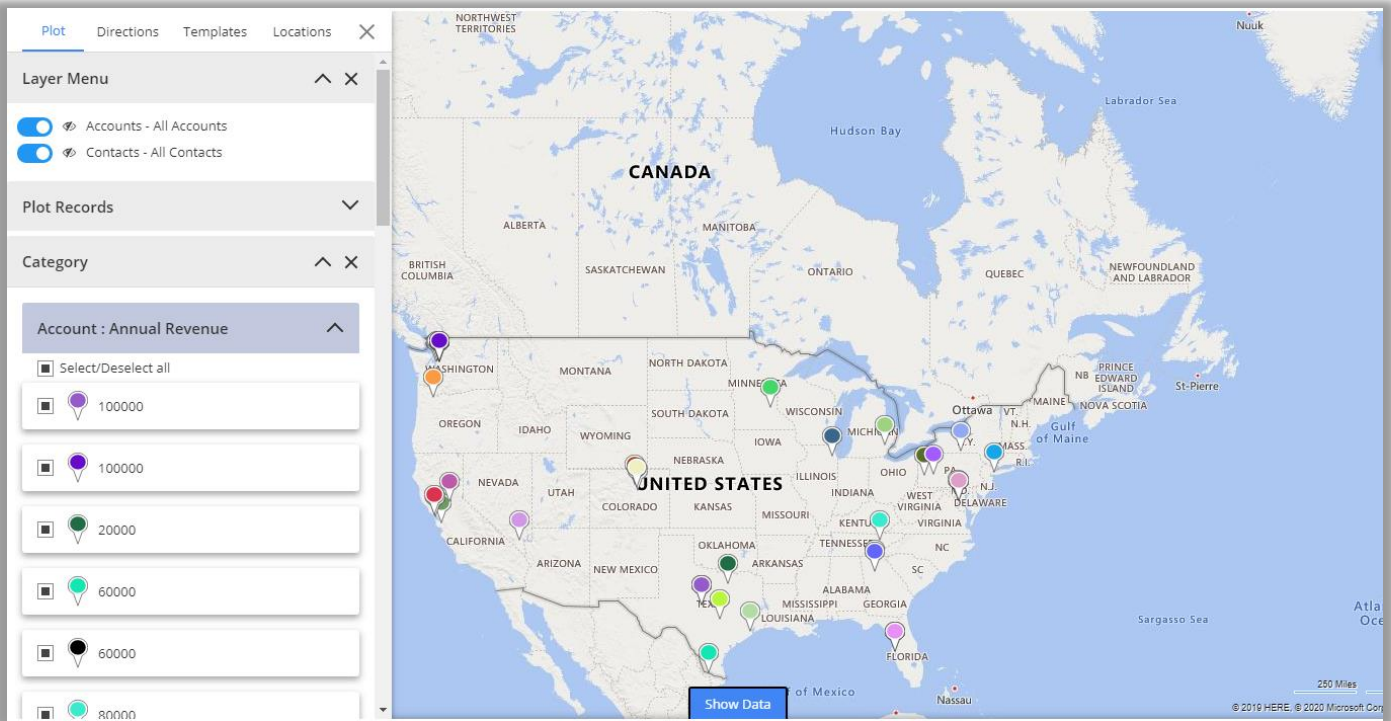
- You can perform Category Search on single as well as multiple entities.
- Performing this search will list out all attributes of the selected entity. These attributes visible in the category listing dropdown can be managed under the **Entity Configurations** section.



- Next, the user needs to select attribute based on which record should be plotted. Here, it would show dialog box for attribute selection for each entity. You can select one or many.

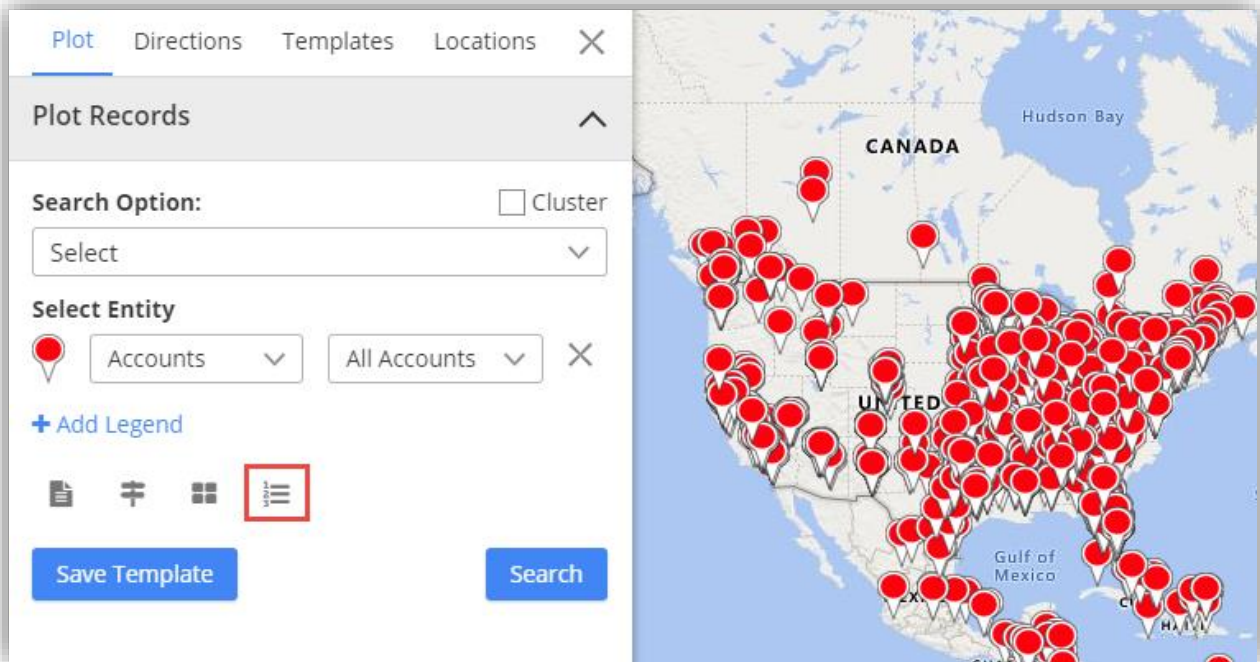


- Clicking on 'Search' button, the data will plot pins as per selection of attributes.



The 'Category' section will be enabled which can be used to view category legend and from there select/unselect records based on requirement.

### Summary Card



- Clicking on 'Open Summary Card' button, you can view total number of records and other entity related details plotted on map as configured from the back end.

Summary Card

Accounts - All Accounts

Annual Revenue: 540000

Employee: 44700

Total: 2224

Leads - All Leads

Annual Revenue: 1540000

Employee: 132200

Total: 2543

Grand Total: 4767

## Search Options

- You can plot the records of particular entity based on different **Search Options**.
- You can plot the records based on **five** Search Options: Region, Drawing, Territory, Proximity and by User.

Plot Records

Default Location:

65 Challenger Rd, Ridgefield Park, NJ

Select Entity

Accounts

Active Accounts

Leads

All Leads

Cluster

+ Add Legend

Search Options:

Select

Select

Region

Drawing

Territory

Proximity

By User



By Region

- **By region** option lets you plot records on the map based on the region of your choice.
- The various regions that you can select one from are **City, State, Country, and Postal Code**.

**Search Options:**

Region ▼

**Region:** i

Select ▼

Select

City

**State**

Country

Postal code

- User can also plot **multiple regions** in map by adding **comma (,)** separated values. For example Texas, Tennessee.
- Here by selecting 'State' under the Region, only the inserted states get highlighted on map along with plotted pins that come under that states.

**Select Entity** Cluster

Accounts Active Accounts ×

+ Add Legend

Search Options:

Region ▼

**Region:** i

State ▼

**State:** \*

Texas, Tennessee

Save Template Search

Show Data

- By clicking on any shape, it will display summary card for selected shape and data will be updated in DataGrid accordingly.

Summary Card ×

**Accounts - Active Accounts**


Number of Employees(Sum) : 24600

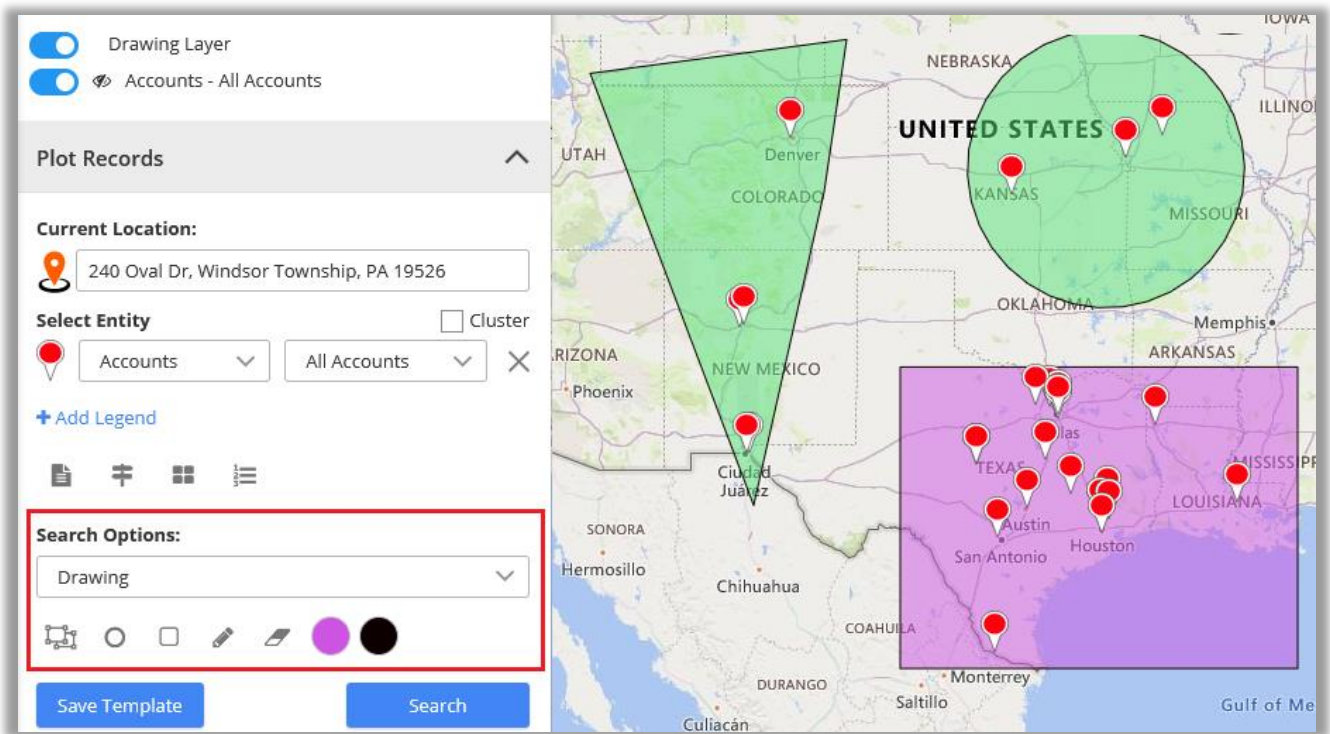
Annual Revenue(Sum) : 270000


Total: 21

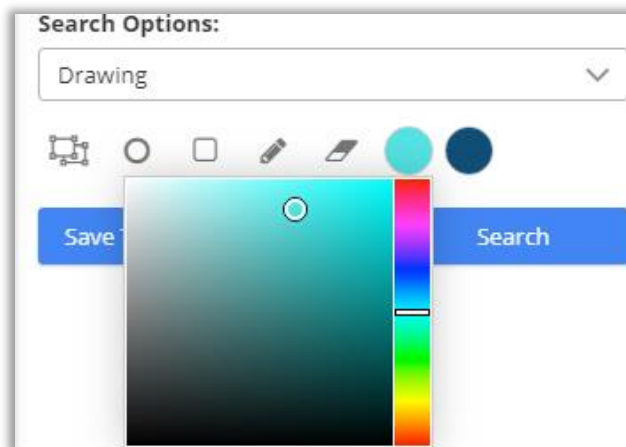
**Grand Total: 21**

## By Drawing

- You can plot the data by defining your own shapes. By selecting the **Drawing** search option, the drawing tool will enable you to draw the following shapes: **Polygon**, **Circle** and **Square**.
- You can edit the drawn shape by selecting 'Edit'  icon. After selecting Edit icon, you can move the shape and increase/decrease the area of the shape.



- You can remove the drawn shape by selecting "Erase"  icon and then click on the shape.
- You can change the **fill color** and the **outline color** of the shape.
- The color picker option is given to change the color of both.



## By Territory

- You can also view records on maps based on **Territory**. By selecting the 'Territory' in search option , you will get the list of Territories in dropdown.

**Search Options:**

Territory

**Territory:**

2 selected

Search

☐ Select all

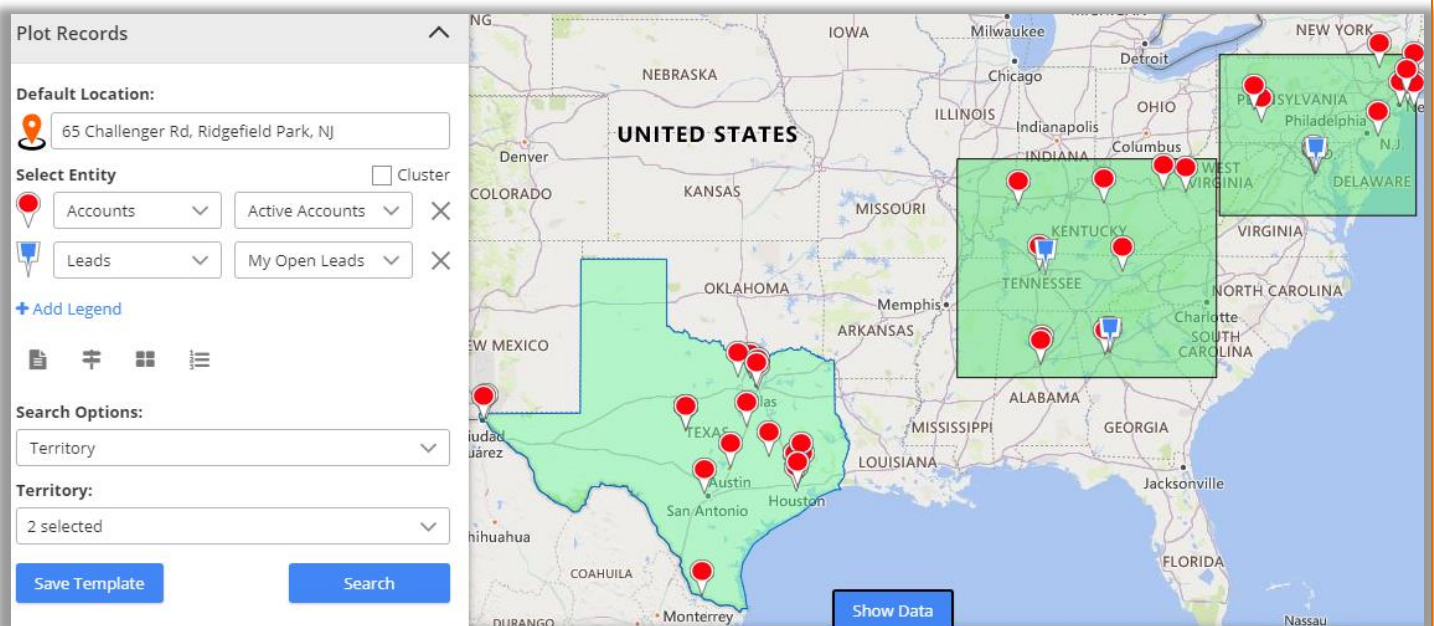
☐ Demo as per Telephonic Inquiry

☒ New Sales

☒ Sales Demo

☐ Sales Reps

- Select the Territory/Territories the records of which you want to display on the map.
- Now, on clicking **Search** button, all records that fall under the selected territory will be plotted on map.
- Note: This dropdown would show those territories also that are created from created under **Territory Management** section or from Settings -> Sales Territory



**Note:** In order to select territory, territories should be defined by you along with their territory manager in CRM.

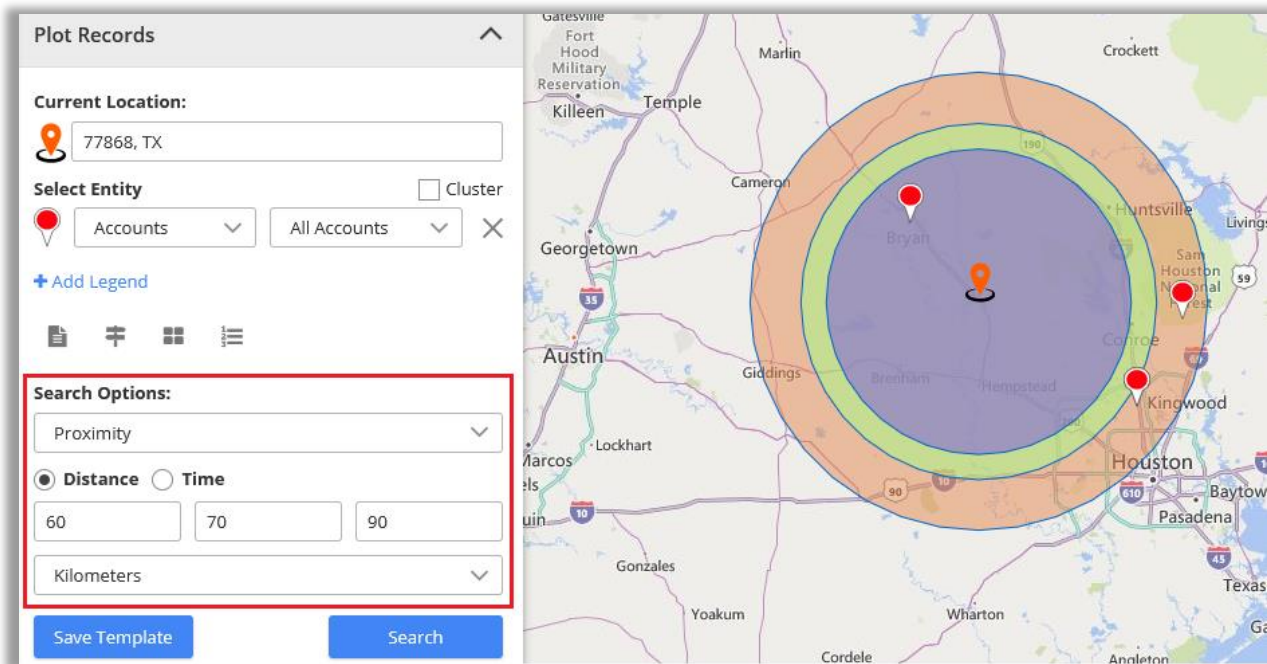
To manage territories, follow these steps: **Settings > Business Management > Sales Territories**.

Also, territories reflect based on territories created under territory management section.

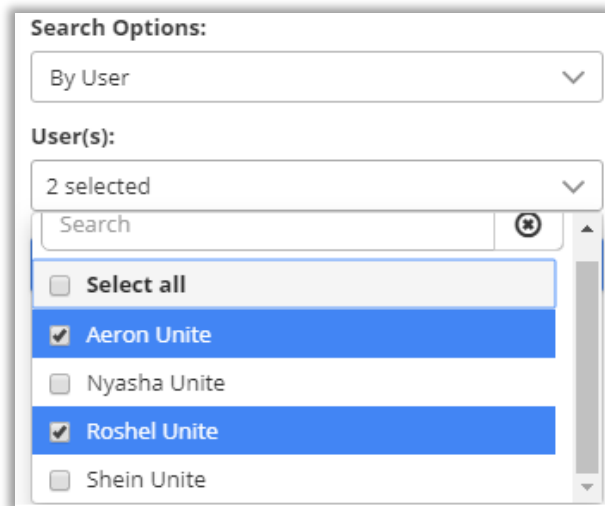


## By Proximity

- It lets you view nearby records in proximity from **current location** based on Distance *or* Time.
- You can define distance either in **miles or kilometers** as well as time in minutes.



## By User

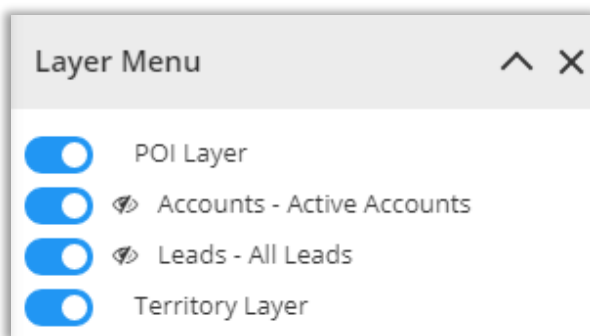
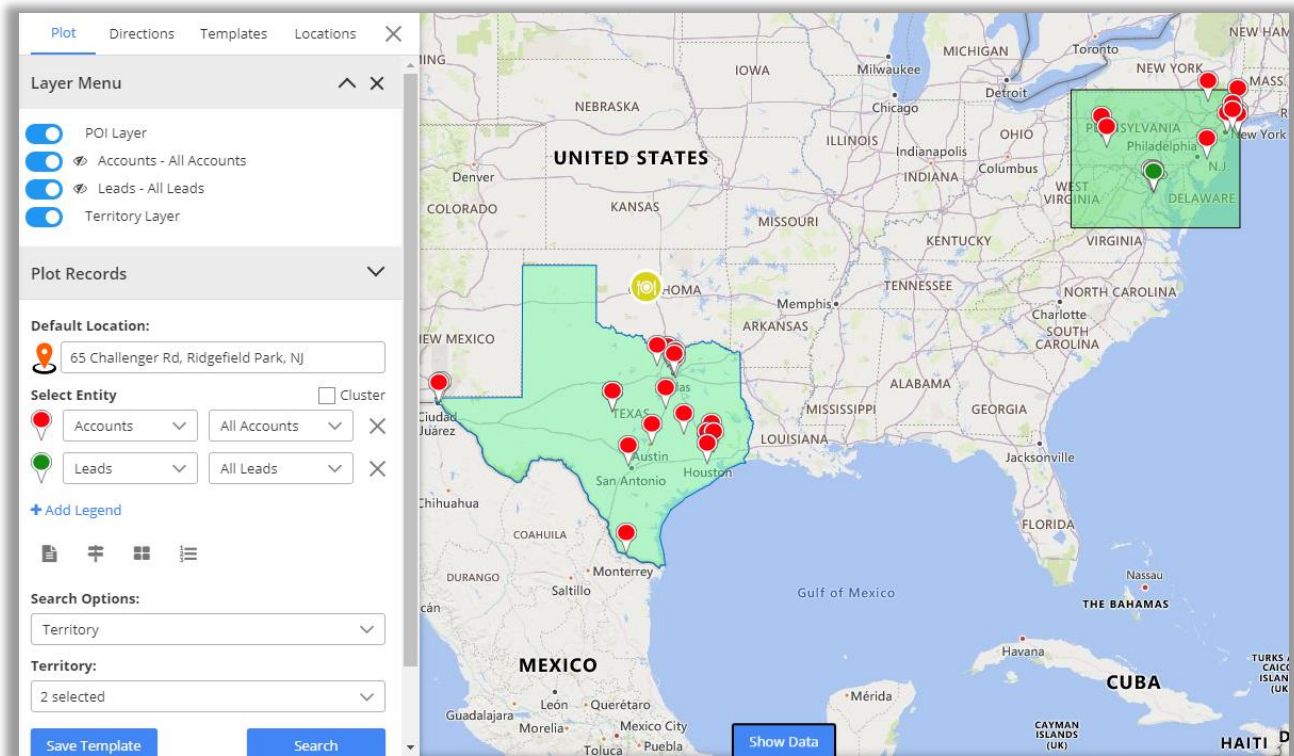



- You can plot records based on **user**. It would plot all records created by the selected user.
- By clicking on **Search** button, the records of the selected user will be plotted on the map.

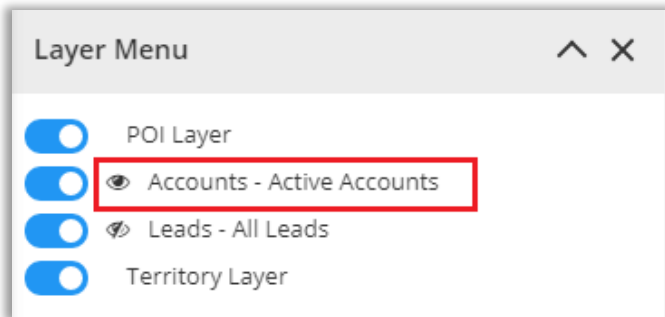
**Note:** This search option is available only to users with admin role.


## Layer Menu

- With every plotting records on the map, it would show each plotting as **Layer**.
- **Layer Menu** displays all plotted Record types in one place. From here, you can **hide/show** the records on the map and **visible/invisible** the 'labels' of the push pins.
- As shown in screenshots below, you can see the layers as per the plotted data: POI Layer, Accounts, Leads and the Territory Layer.

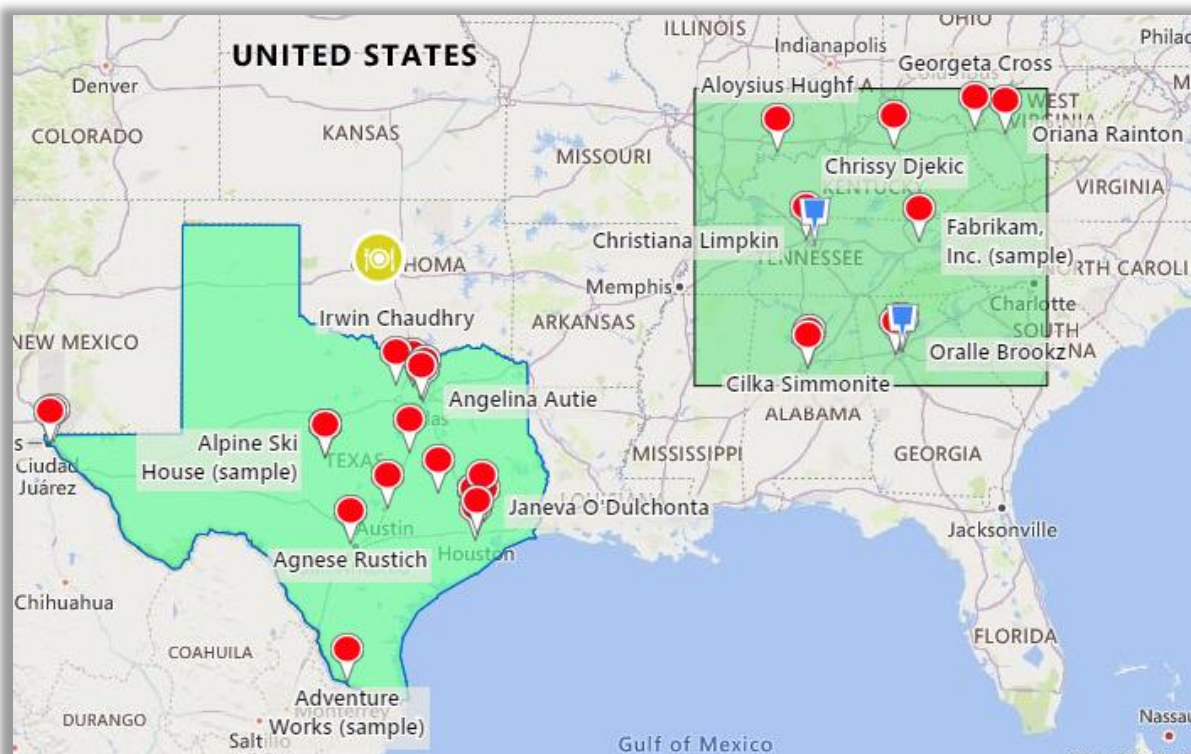


- User can select just the required data among the plotted data on the map from the **Layer Menu**.
- To show or hide the layers of different plotted data to view on the map, User can use 'toggle' buttons.
- By clicking on Invisible icon  (eye icon), you can view **labels** for the **pushpins**.



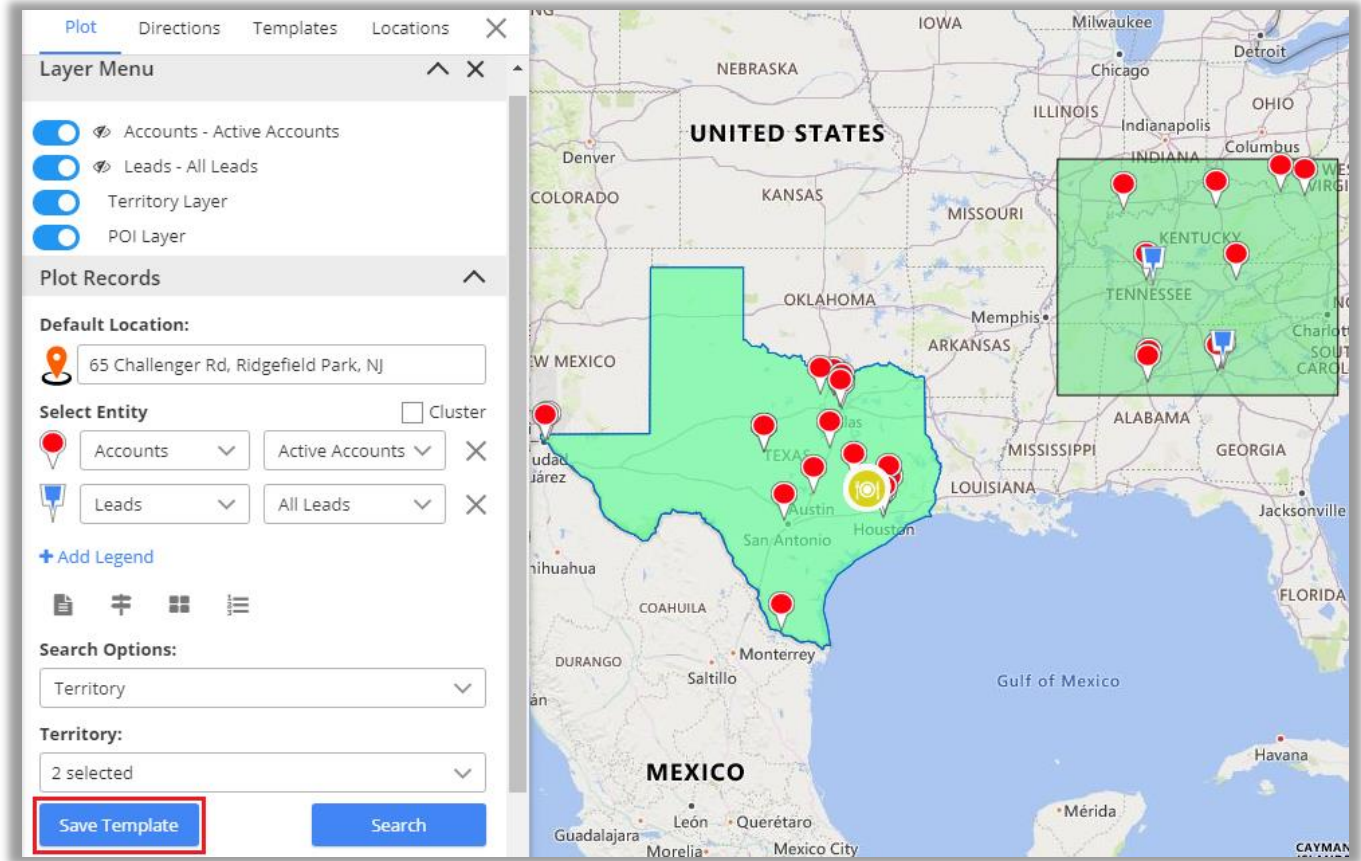
- Suppose by clicking on  (eye icon) of **Accounts – Active Accounts**, the label (name) of the accounts will be visible on the map.

- You can see the label (name) of all the accounts.

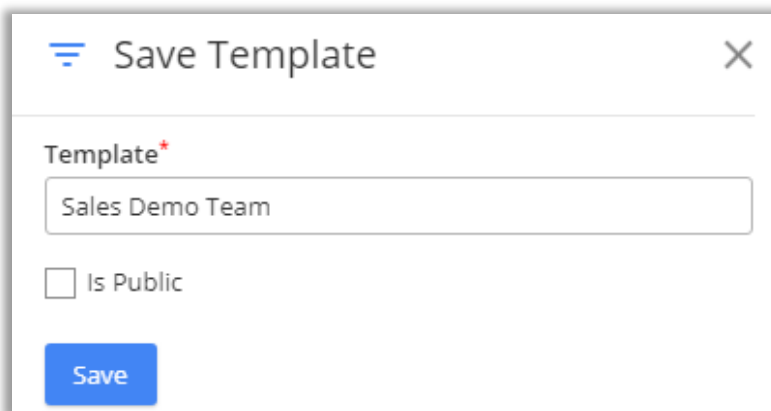


## Save Template

- All the plotting data made along with zoom level configurations can be saved as Template.



- By clicking on **Save Template** button, a dialog box opens to give a name to the template. Moreover, you can 'tick' the box **Is Public** to make the template public.

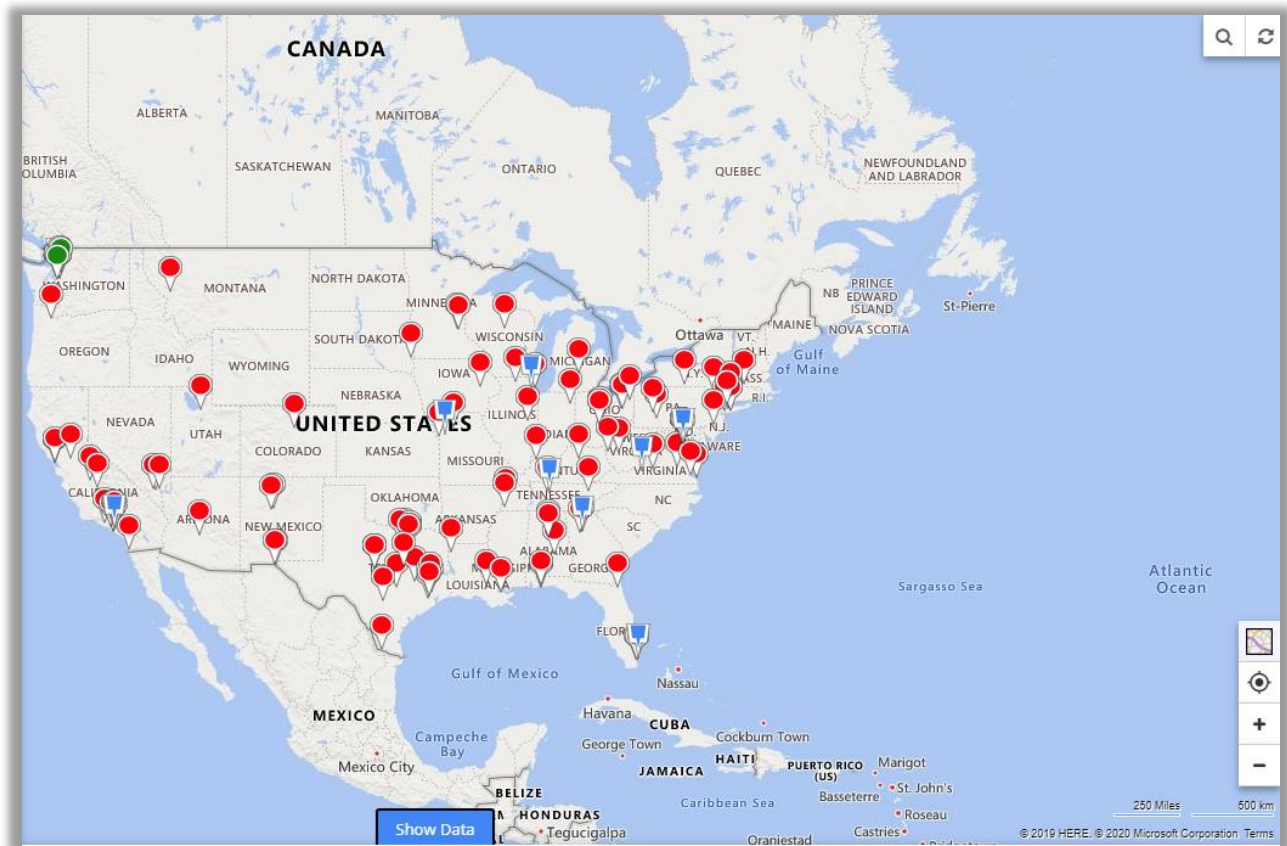


- After inserting the Template name, click on **Save** button to save the template for future reference.



## Map View options

- There are many options and actions provided to manage the map records easily from the Map View.



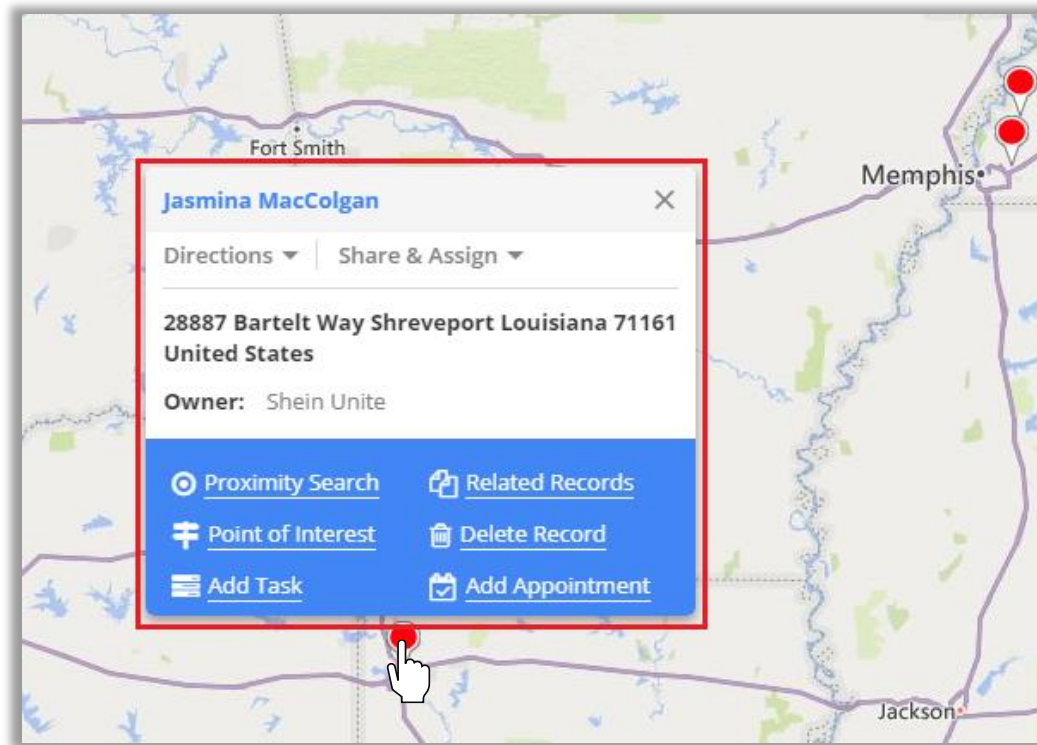
### Details on Hover

- You can view record name by hovering on any pushpin. Information shown on hover is completely customizable from the Entity Mapping.

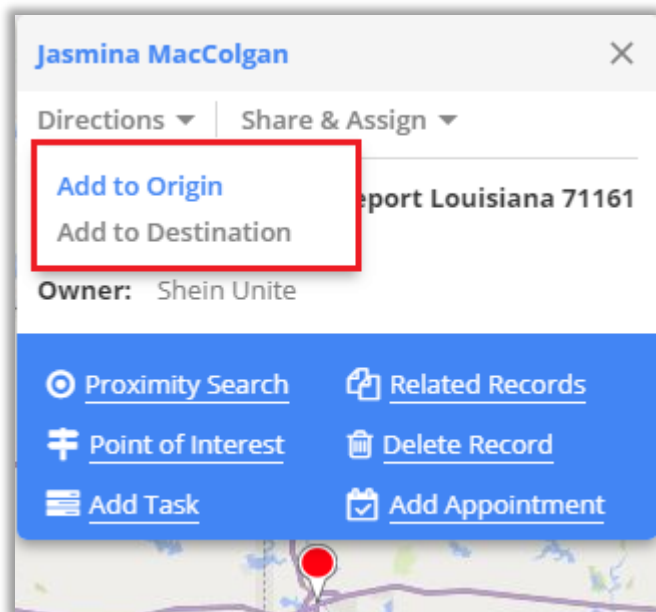


## Tooltip Details

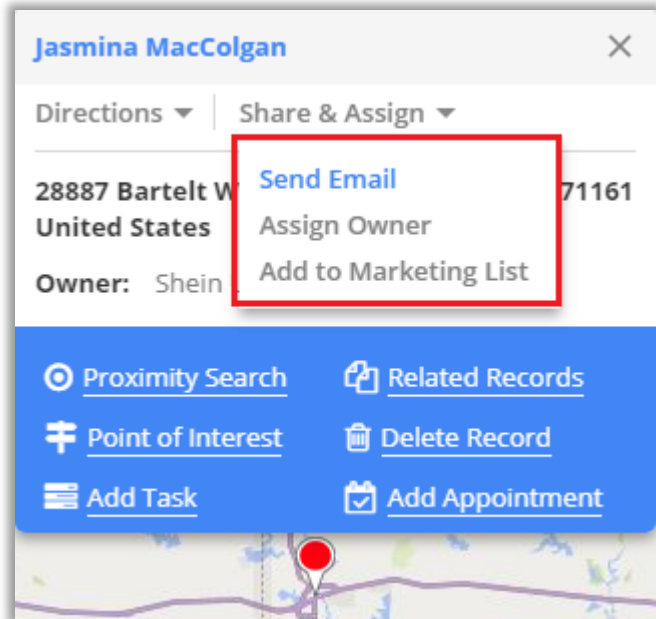
- By clicking on any particular pin, you will get details related to that record based on configurations done from the backend.



- Along with details there are **actions buttons** available in the pop-up.
- These action buttons will let you perform different actions related to **Directions** like:
  - > Add to Origin
  - > Add to Destination

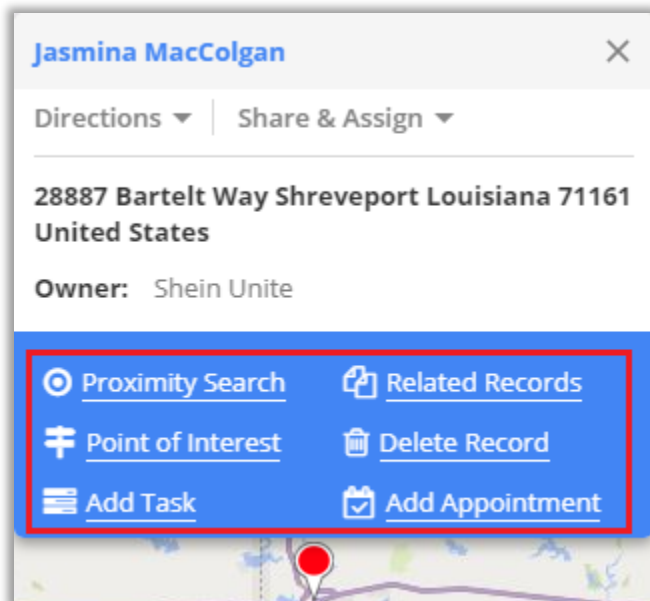


- While related to **Share & Assign** like:
  - > Send Email
  - > Assign Owner
  - > Add to Marketing List



**Note:** These action buttons are present by default on record of every entity and these buttons cannot be changed.

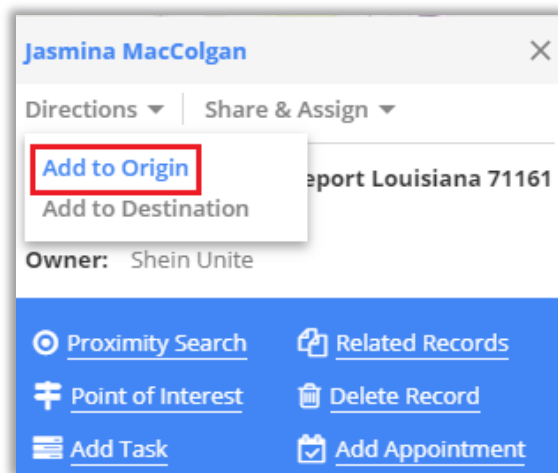
- There are some **other actions** that can be enabled/disabled from the **Security Template** configuration.
- Other Actions:
  - > Proximity Search
  - > Related Records
  - > Point of Interest
  - > Delete Record
  - > Add Task
  - > Add Appointment



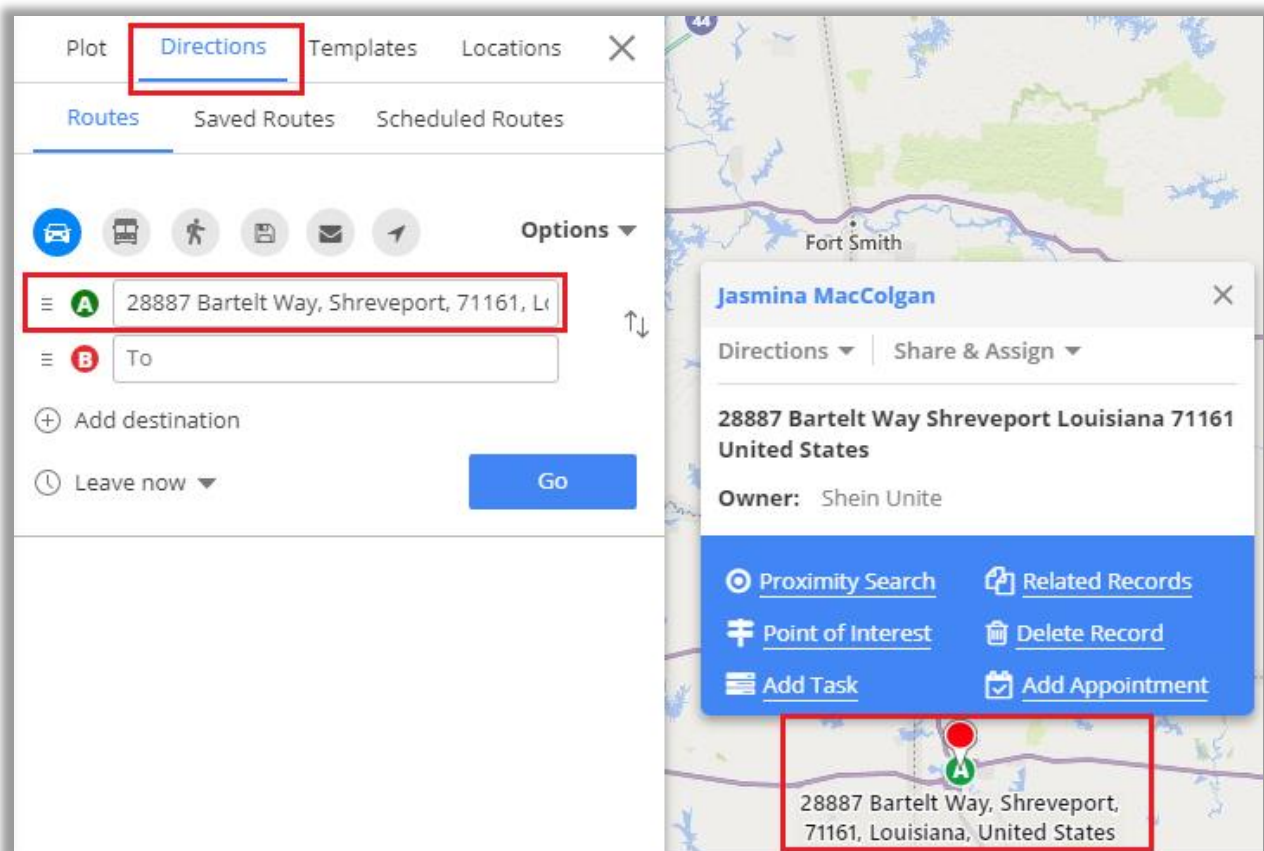
**Note:** Other than these, there are few actions buttons like **Add Task** and **Add Appointment** that are dependent on the selected entity.

## Add to Origin

- By clicking on **Add to Origin** option, address of that record will be added as starting point of route under **Directions** tab.



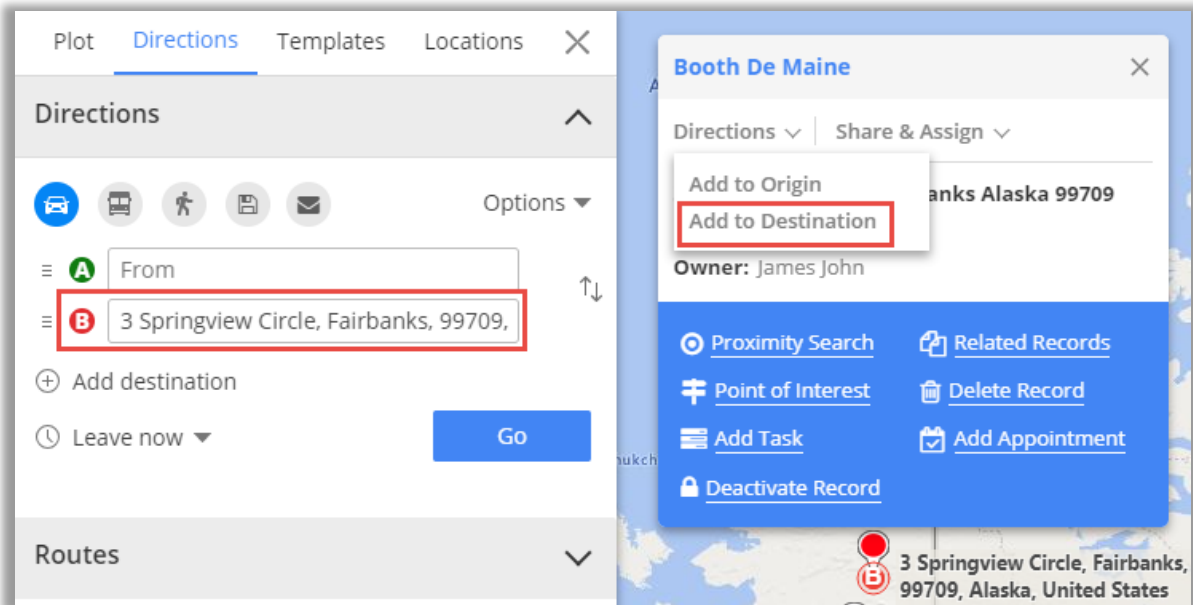
- From **Directions** tab you can get route from any location to your customer's location.
  - On the map, the 'Starting Point' will be assigned as **A** with the address of that record displayed.



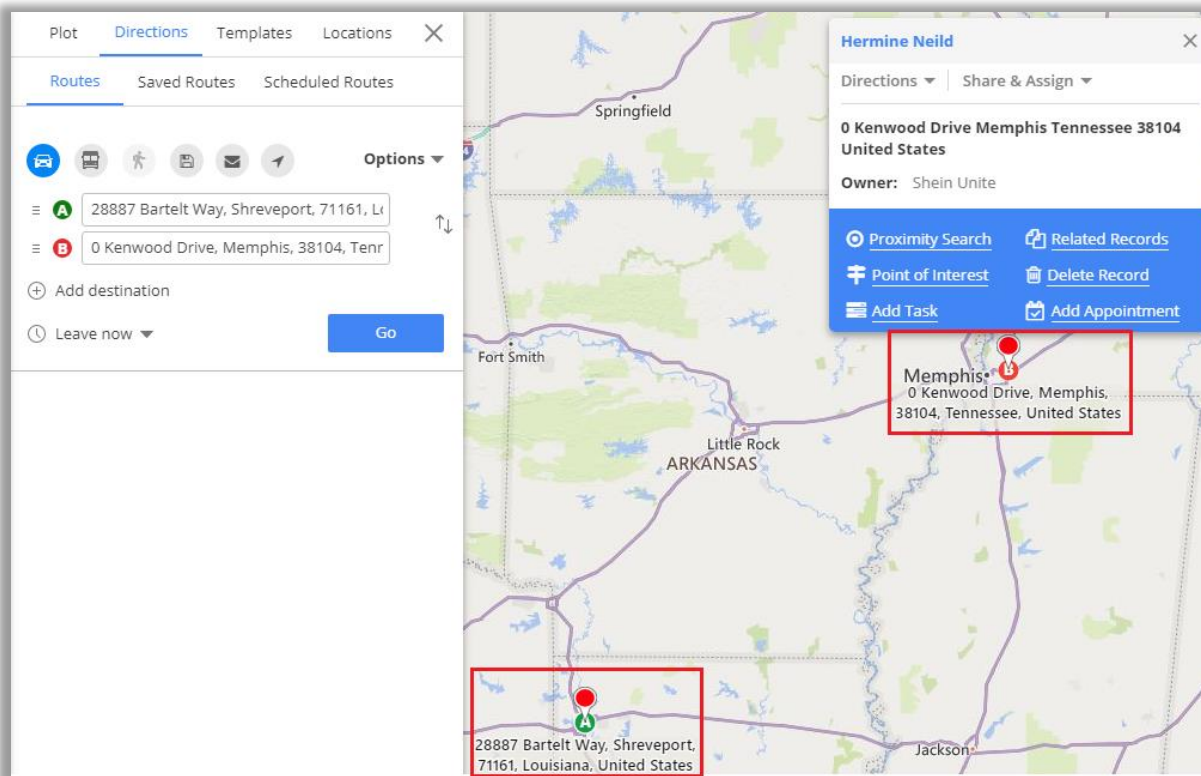


## Add to Destination

- By clicking on the **Add to Destination** option, the address of that record will be added as destination point of route under **Directions** tab.



- You can select the **Origin** and the **Destination** between the plotted records from the **Directions** option and manage your route based on that direction.



- Click on the **GO** button to check the routes between selected **Origin** and **Destination** on the Map.

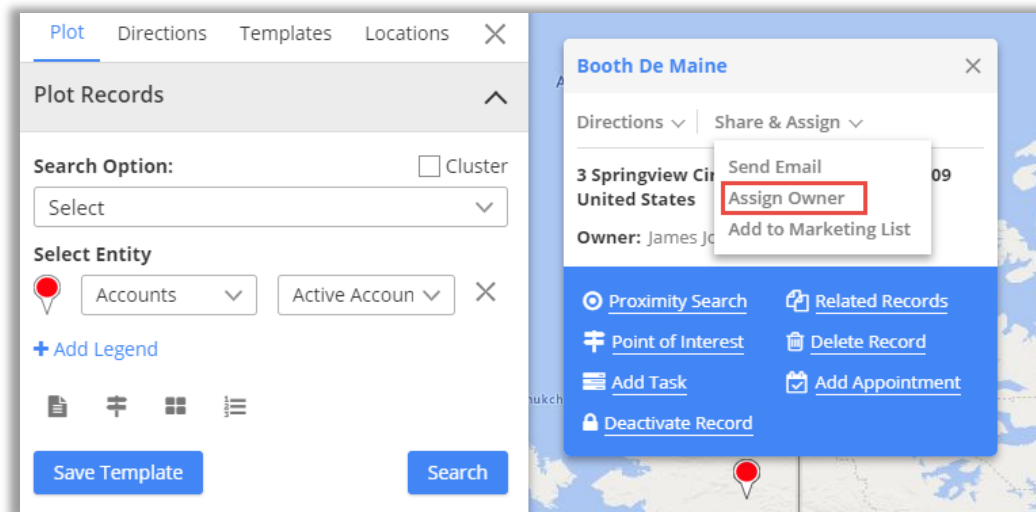
### Send Email using Template

- To send email, click on **“Send Email”** action button. Clicking on that action button, it would prompt user to select an email template.
- The email templates list would have list of all the templates that are created within the CRM and custom templates as well. You may select from the list or select New email to create a new one. Selecting template would directly perform the mail action if email id is available. While creating a new one would redirect to CRM email screen.

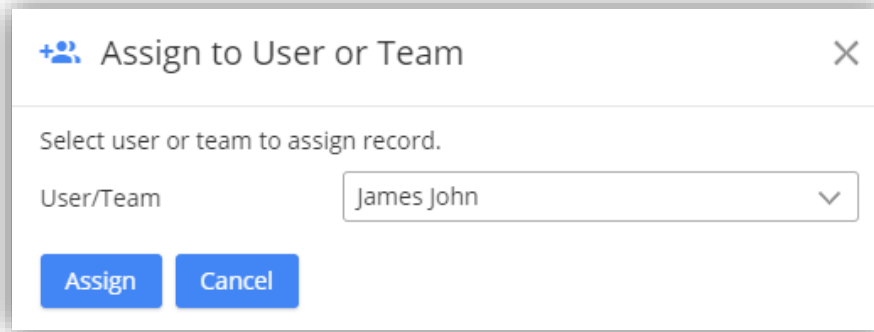


**Note:** If user to whom the mail is being sent isn't operating the email address, then the mail won't be sent and an error message stating that record's email address is not active will be displayed.

### Assign Owner



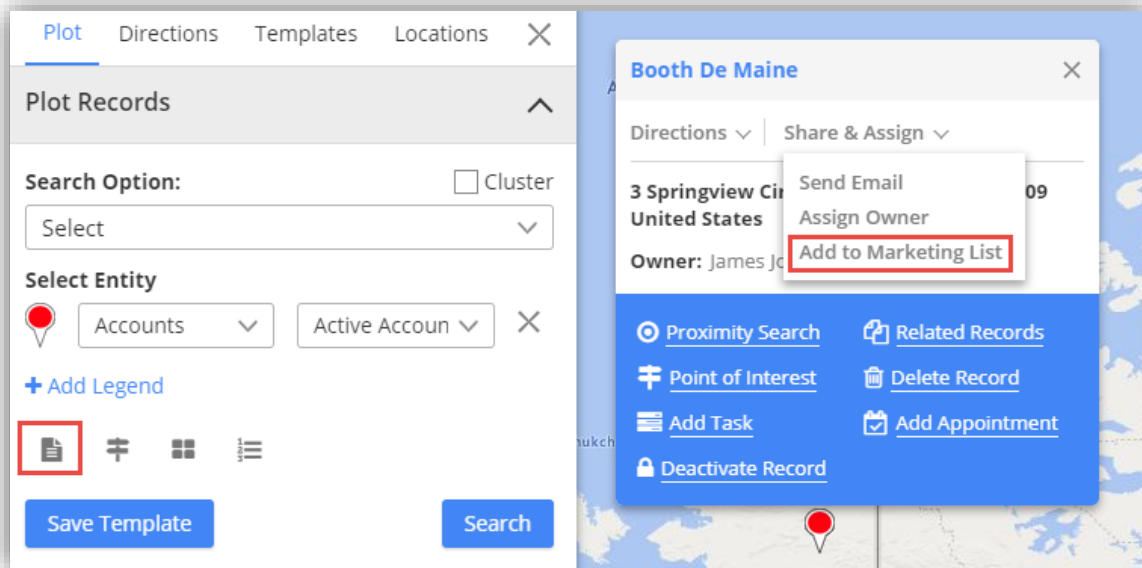
- You can assign any record to specific user or team by clicking on **“Assign Owner”** option from specific user's details.
- Selecting Assign Owner option, it opens a dialog box where dropdown list of all the CRM users is provided to select user or team as required. After selecting the appropriate User/Team, click on Assign button.



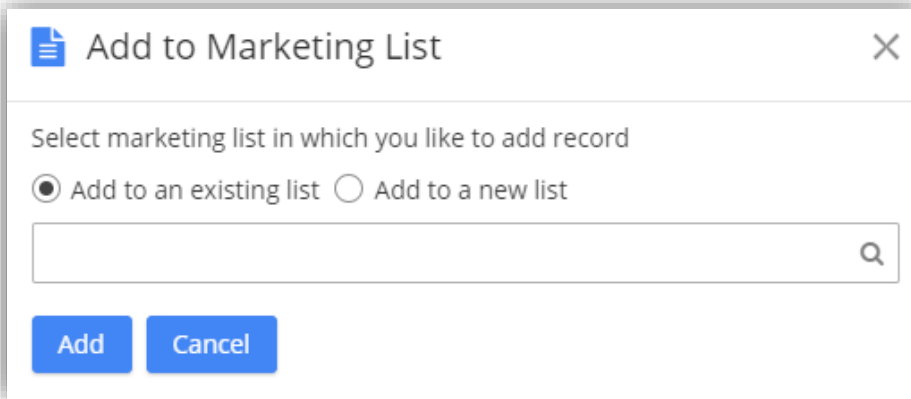
**Note:** When assigning record to a user or team, that particular user or team should have role assigned to it or else record won't be assigned.

### Assign to Marketing List

- You can assign any account, contact or lead record to marketing list by clicking on “Assign to Marketing list” icon under map section or by clicking on “Assign to Marketing list” option from specific user’s details.



- On clicking, you will have the option to add record either in existing marketing list or create the new one.
- After selecting the marketing list, click on the **Add** button to complete the addition of records to the marketing list.



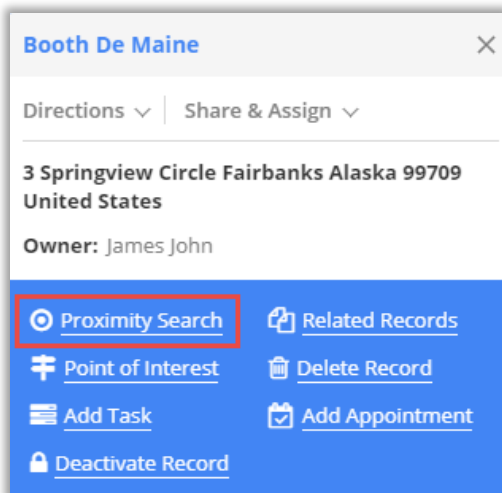
**Add to Marketing List**

Select marketing list in which you like to add record

☒ Add to an existing list ☐ Add to a new list

**Note:** Assign to marketing list icon under map section, will assign all records of particular entity to the list. Also, it will get assigned only when records of single entity are plotted on map.

### Proximity Search



**Booth De Maine**

Directions ▾ | Share & Assign ▾

**3 Springview Circle Fairbanks Alaska 99709  
United States**

**Owner:** James John

☒ Proximity Search ☐ Related Records

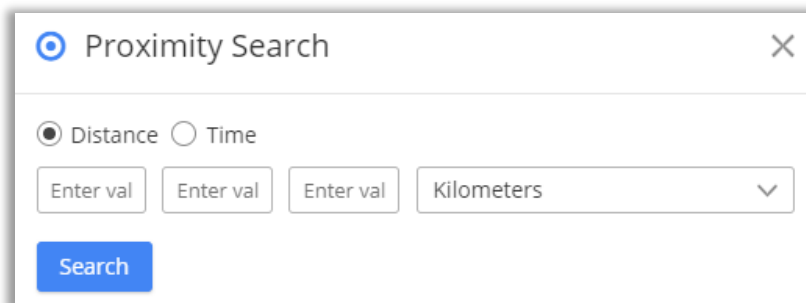
☐ Point of Interest ☐ Delete Record

☐ Add Task ☐ Add Appointment

☐ Deactivate Record

- It lets you to view nearby records in proximity from current record based on time or distance.

- You can define distance either in miles or kilometers as well as time in minutes.
- You can also perform concentric proximity search based on distance with three different values.

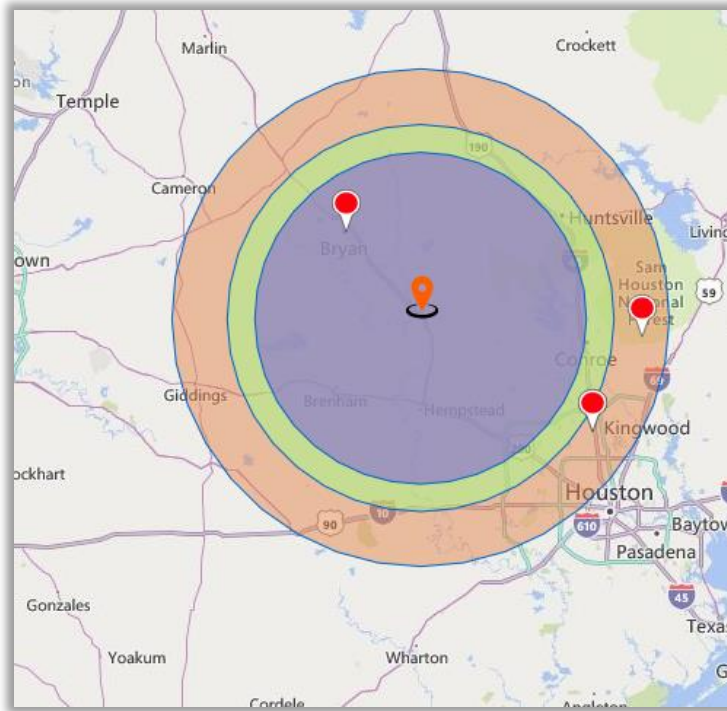


**Proximity Search**

☒ Distance ☐ Time

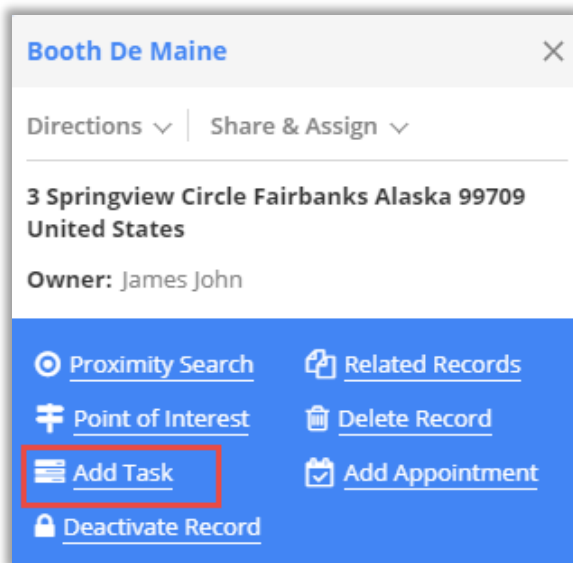
- Here on defining search criteria of 10,20,30 Km, it will plot records situated in 10,20,30 Km area from current pin location. Also, you can search in proximity from single entry as well.

- On hovering over pin, you get details as configured along with travel distance in case of search based on distance. And travel time in case of search based on time.



**Note:** When proximity search is to be done on basis of time, at max you can define 85 minutes.

## Add Task







**Booth De Maine** ✕



Directions ▾ | Share & Assign ▾


**3 Springview Circle Fairbanks Alaska 99709 United States**

Owner: James John

 Proximity Search    Related Records

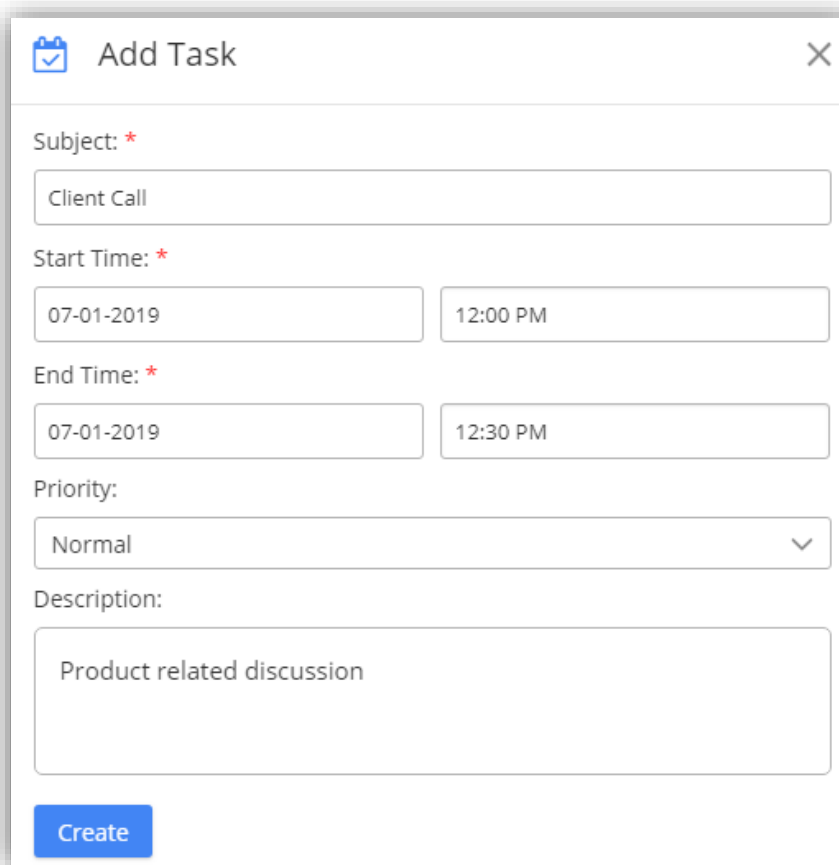
 Point of Interest    Delete Record


 **Add Task**    Add Appointment

 Deactivate Record

- You can add task for a record directly from map itself by clicking on “Add task” icon associated with particular record.

- Any task can be added for a record along with their priority such as Low, Normal, and High.



 **Add Task** ✕

Subject: \*

Start Time: \*

End Time: \*

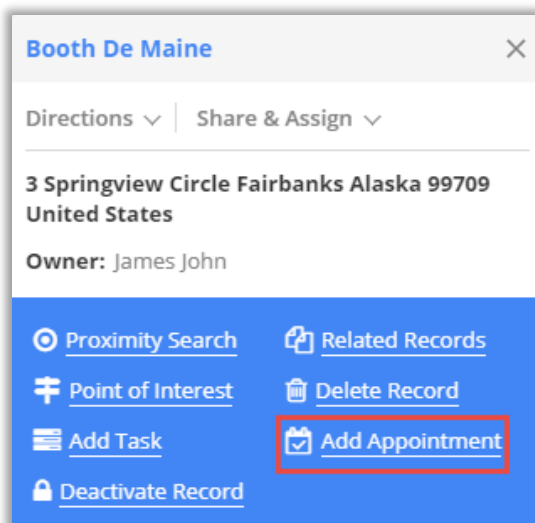
Priority:  
 ▾

Description:

**Create**

- The task that is added can be viewed in detailed view of record in Dynamics CRM.

## Add Appointment

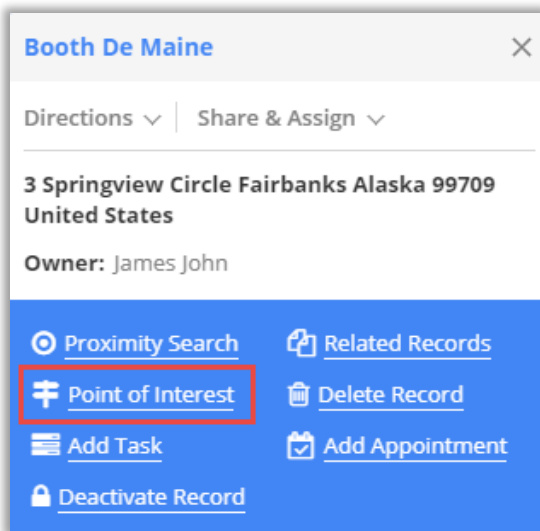


- You can schedule an appointment for a record by clicking on “**Add appointment**” icon associated with particular record.

- Appointment can be added for a record along with their priority such as Low, Normal, and High.
- Along with priority, you can also enter the location of meeting.

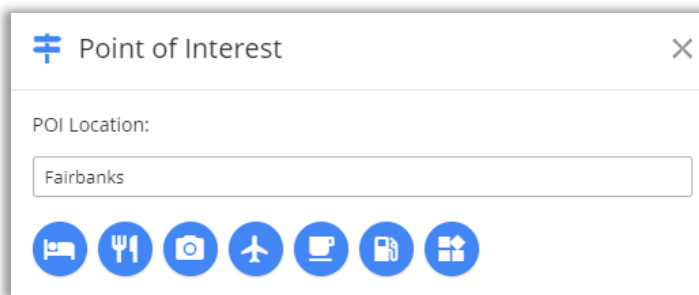
- The appointment that is added can be viewed in detailed view of record in Dynamics CRM.

## Point of Interest

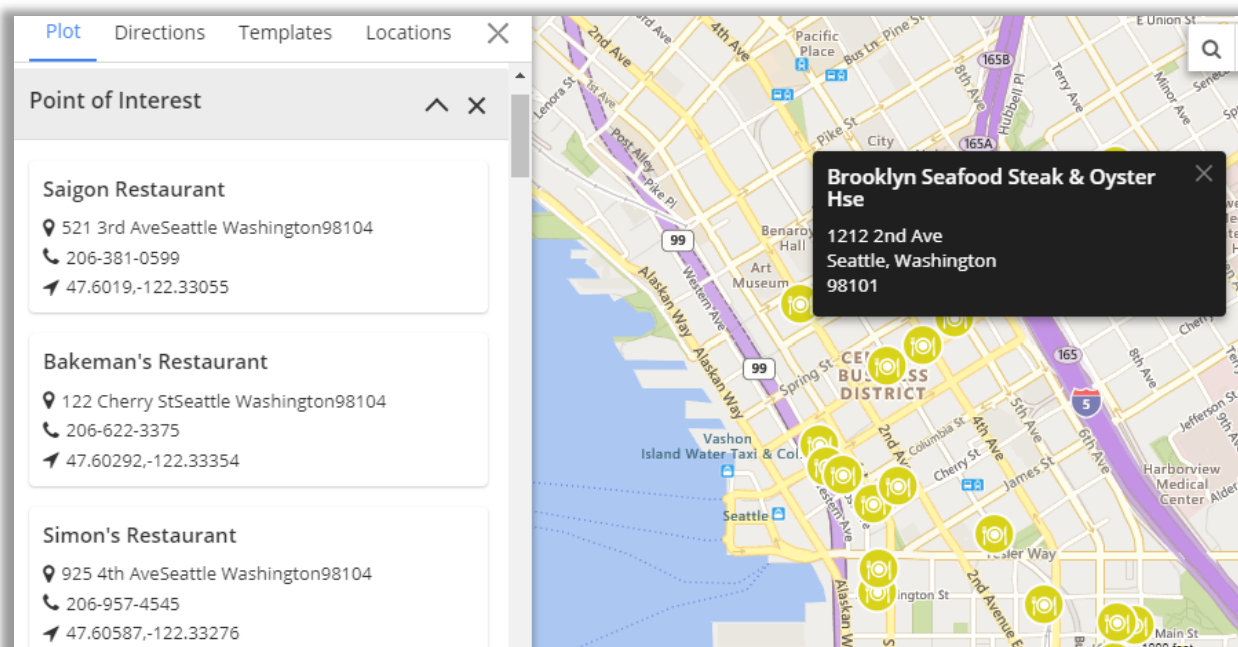


- You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. by clicking on POI icon.
- Clicking on POI icon from particular pin, will take address of that particular record as POI location to search nearby places.

- Clicking on POI under maps tab will let you search for locations from any location that you enter.



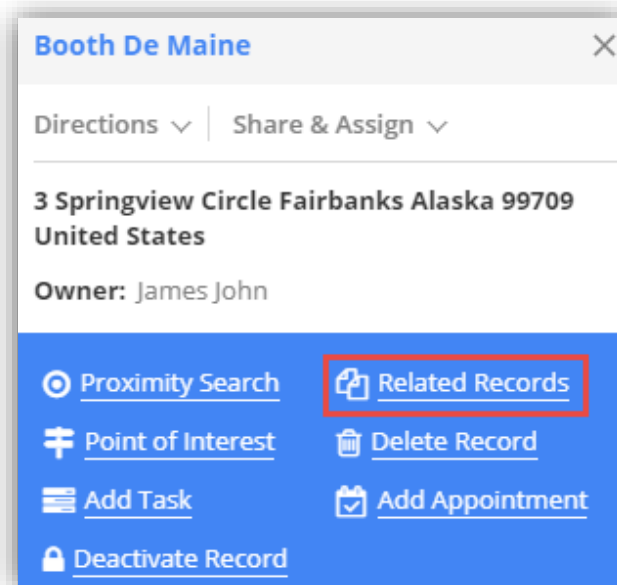
- When you click on 'Point of Interest' section on the left, will show all the plotted point of interest locations.





## Related Records

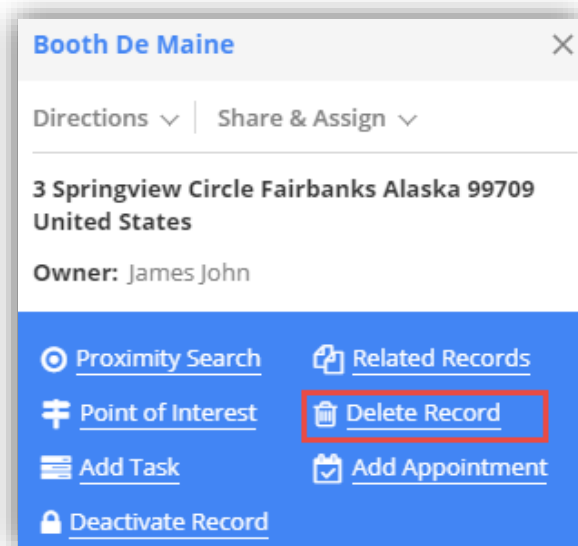
- By clicking on “**Related Records**” icon, all related records to the plotted record get plotted on map.



- Here, as there were three contacts associated with the account, all three of them will get plotted on the map.

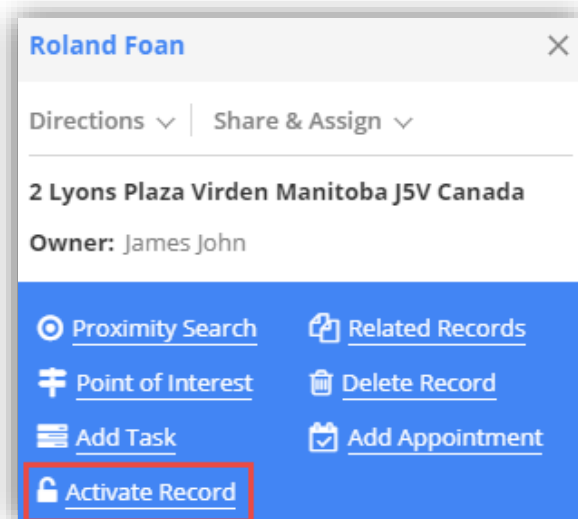
## Delete Record

- By clicking on delete button, selected record from map gets deleted from the CRM.



## Activate Records

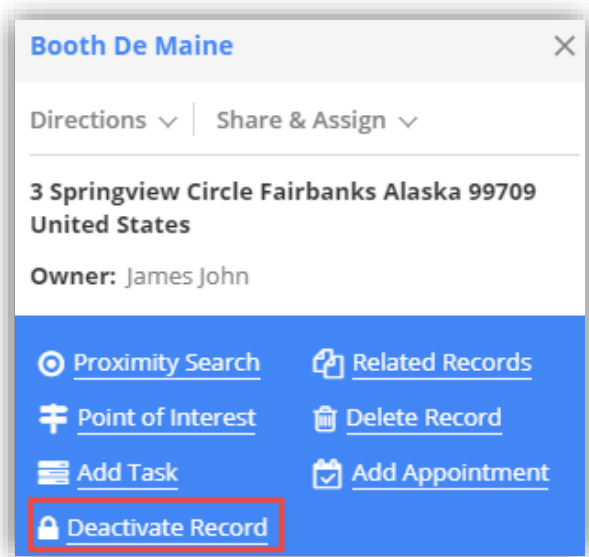
- By clicking on 'Activate Records' icon, status of the particular record gets updated to activated state. It will be available for records of only Account or Contact entity.



**Note:** Inactive records will show activate button. Once activated, they will be shown in active view.

Deactivate Records:

- By clicking on “Deactivate Records” icon, status of the particular record gets updated to deactivate state. It is available for records of only account or contact entity.

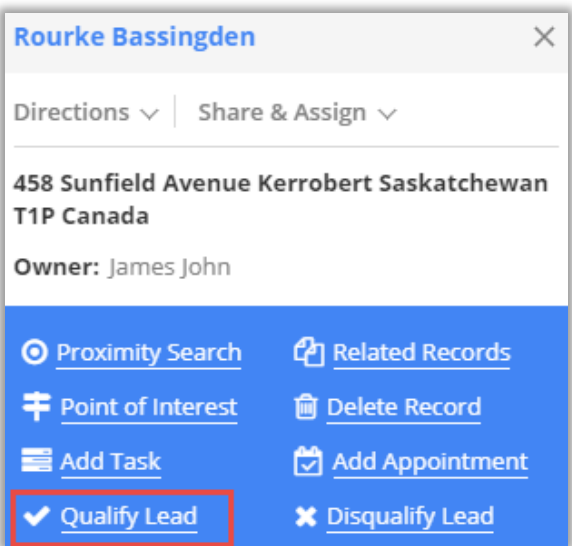


- On clicking deactivate icon, you will get warning message regarding deactivation. Click Ok to continue.

**Note:** Active records will show deactivate button and on deactivating record, deactivated records will be shown in inactive view.

Qualify Lead

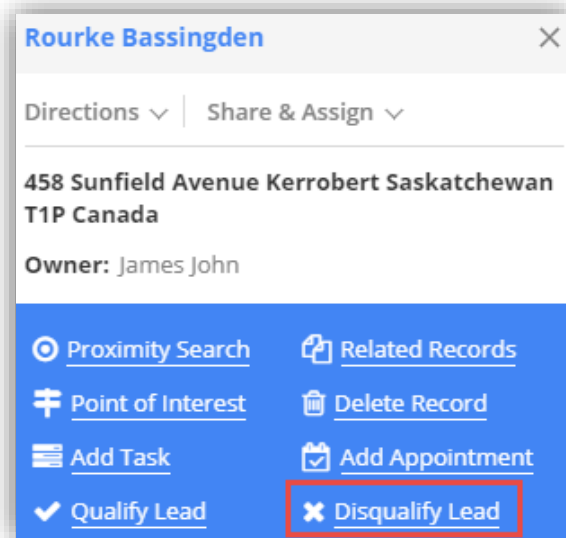
- By clicking on “Qualify Lead” icon, status of lead will get updated to close state and user will be redirected to opportunity page from the map. It is available only for record of lead entity.



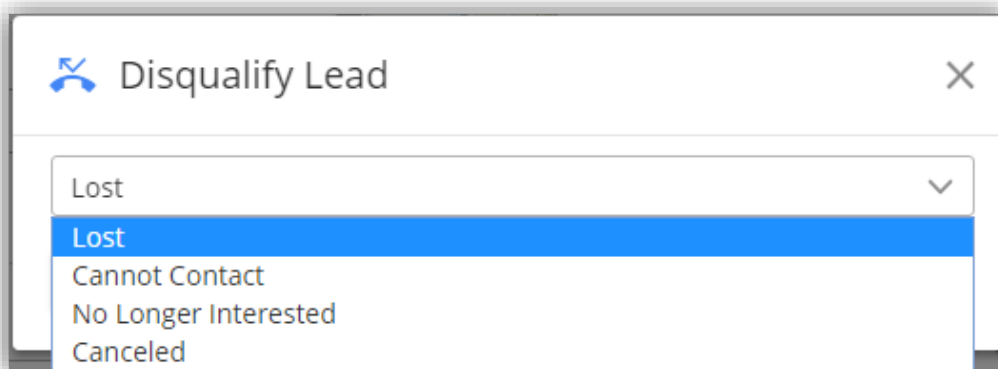
**Note:** Open leads will display option to qualify/disqualify lead. Once leads are qualified, those leads will be shown in Closed Leads view.

## Disqualify Lead

- By clicking on “Disqualify Lead” icon, leads will get disqualified and its status will be changed to close.



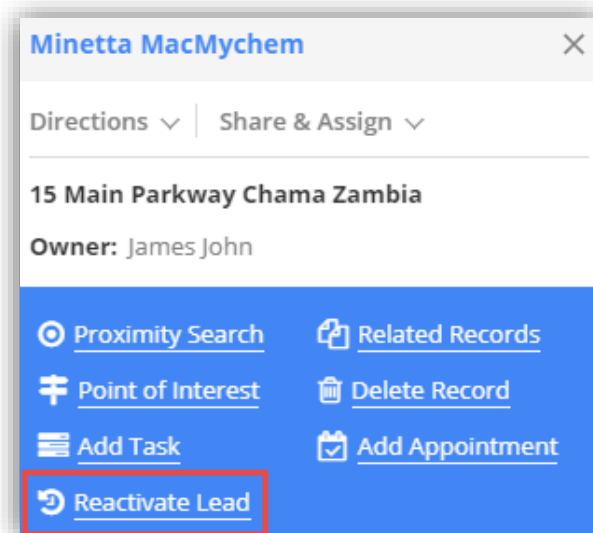
- Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Canceled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.



- Disqualified leads can be reactivated by clicking on Reactivate Icon present with closed lead record.

## Reactivate Lead

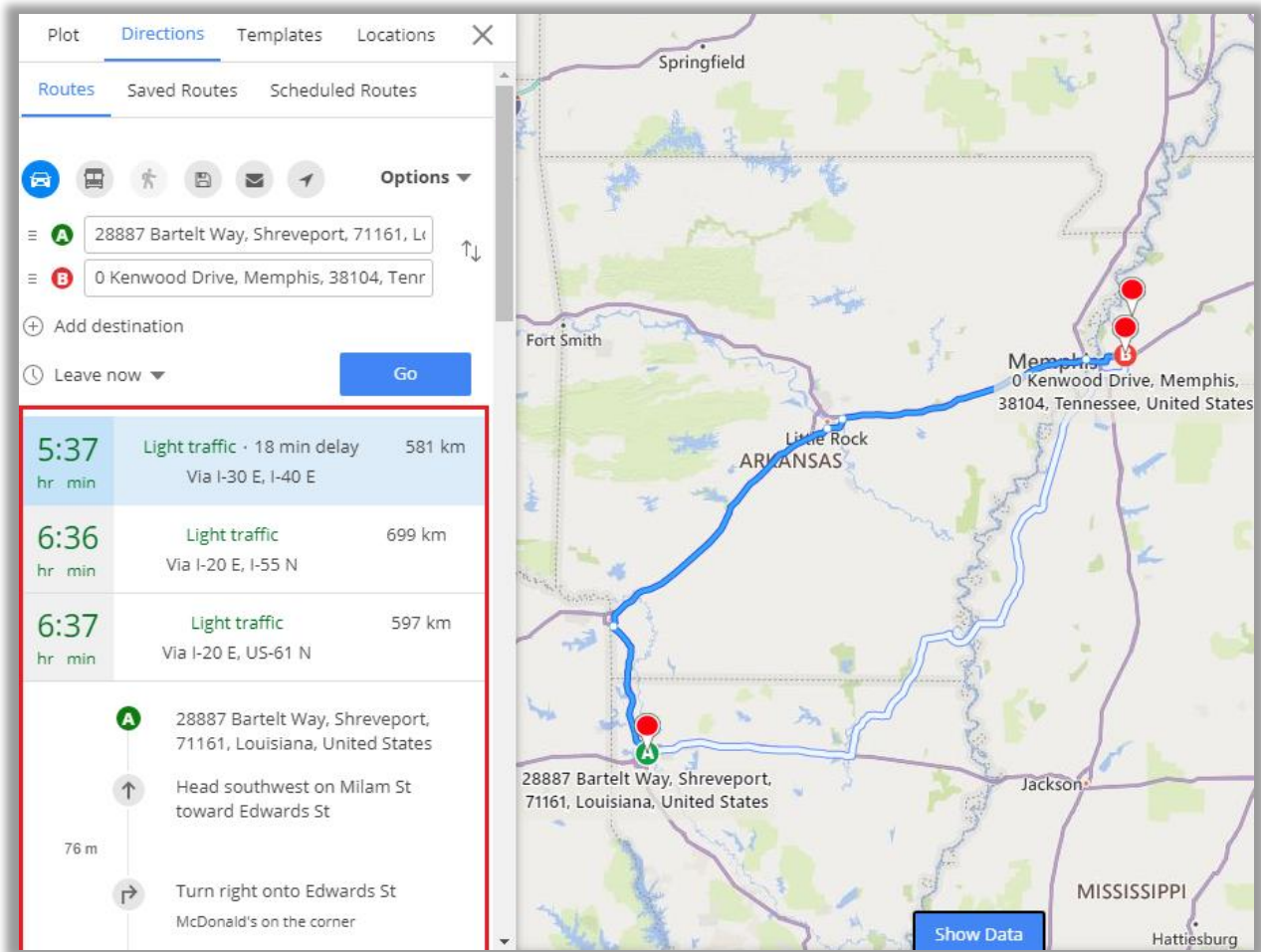
- By clicking on “**Reactivate Lead**” icon, leads will be reactivated, and its status will be changed to Open.




**Note:** On reactivating lead, view of lead will get updated from closed leads to open leads.

## Direction

- In the **Directions** tab, you will get the route navigation with details. On the Map, you will get directions based on Driving including alternate direction if any.



- In **Direction** tab, you can also add multiple address and get directions. You can reverse the direction by clicking on this icon .
- You can add multiple way points by clicking on 'Add Destination'. You can add a maximum of **25-way points**.

## Multiple Routes

- By clicking on any location or plotted records, click on 'Add to Destination' to add multiple way points. As you add all the required location and click on GO button, you will get the routes based on the location of multiple way points

The screenshot displays the DynamicsCRM MappyField 365 interface for route planning. The left sidebar contains a list of destinations labeled A through D, each with a location and state. Below the list are buttons for 'Add destination', 'Leave now', and 'Go'. The main map area shows a blue route connecting these points across Louisiana, Tennessee, and Alabama. A 'Show Data' button is at the bottom right.

The screenshot shows the 'Directions' tab in the DynamicsCRM MappyField 365 interface. It lists the same four destinations as the previous screenshot, but in a different order: A (28887 Bartelt Way, Shreveport, 71161, La), B (0 Kenwood Drive, Memphis, 38104, Tenr), D (91 Glendale Junction, Birmingham, 35211), and C (5814 7th Alley, Nashville, 37235, Tennes).

- For all the waypoints added in the route, each way point can be dragged to reorder their position in the route.
- After reordering the route, it will immediately reflect on the map also.



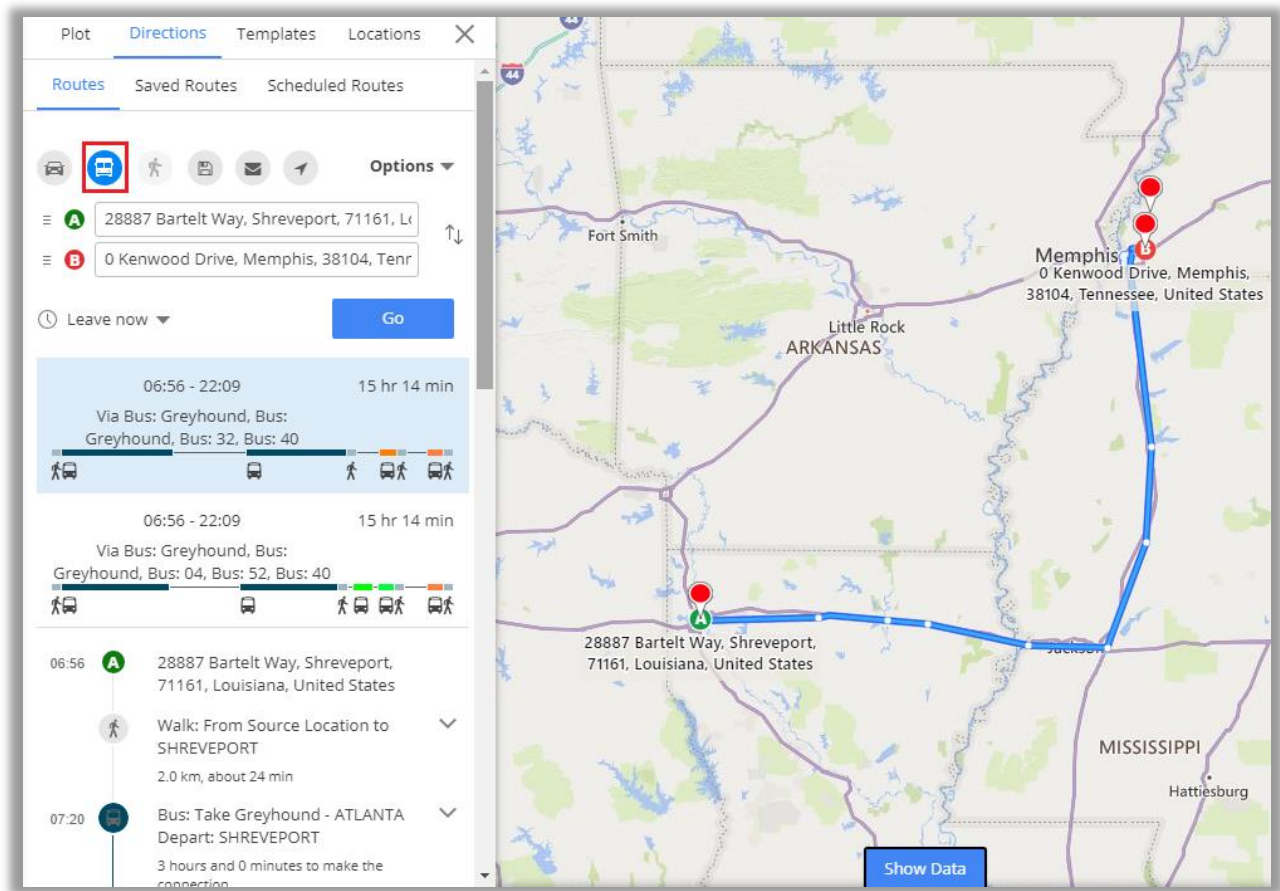
- You can select the time at which the generated route is going to be used by you.
- For that click on **Leave now** option.

- By clicking on **Leave Now**, you will get **Leave now**, **Leave at** and **Arrive by** options.
- Select the date and time when you want to travel.

- **Arrive by** option is only available when there are only **Origin** and **Destination** locations set.



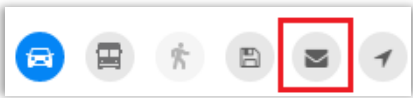
- After selecting the location between **Origin** and **Destination**, it will list all possible routes and highlight the optimized route.



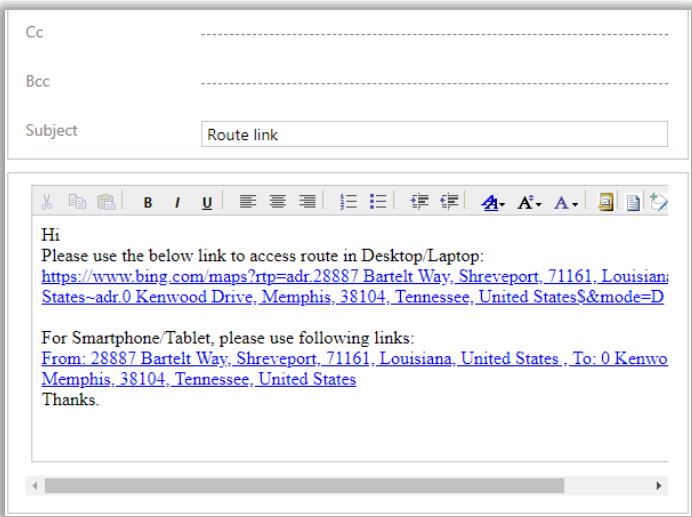
- You can also get directions based on means of transport like **Public Transit** and **Walking**.

Email Route


- You can share a route in mail by clicking on Email  icon.

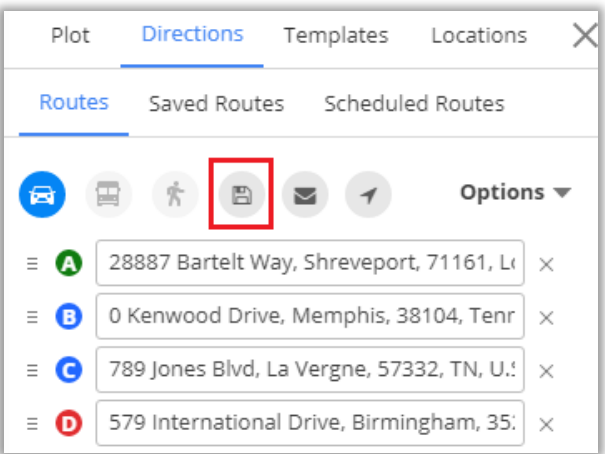




- As you click on it, the **Email** page will open with the **link of selected route**.



Save Route

- Also, the selected route can be saved for future reference.
- To save a route, click on the Save  icon available on the top.




 Save Route 


Route Name \*

Kyle's Route (Sales Demo)


User/Team

Shein Unite 


Route Date \*

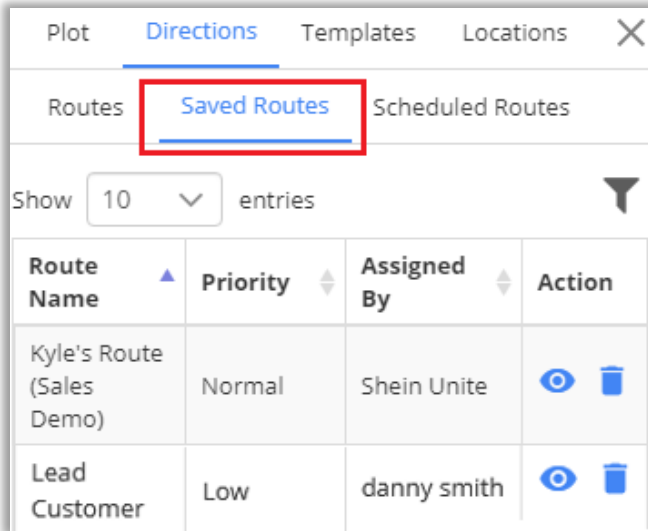
05-02-2020 

Priority

Normal 

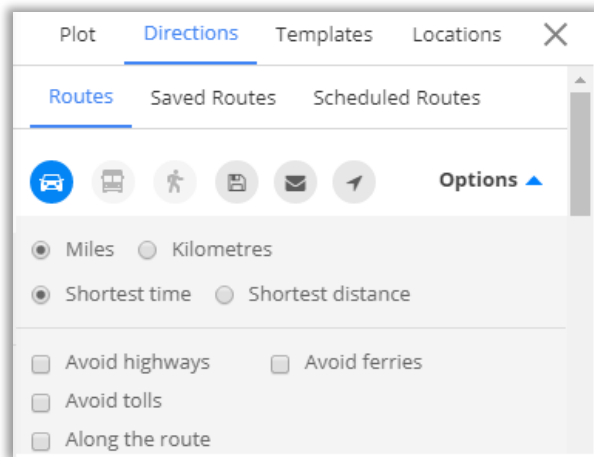
Save

- By clicking on Save  icon, it opens a dialog box where you need to provide a name to the route and user/team name to whom the route is being assigned.
- Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.



- Under “Direction” section, you can view all **Saved Routes**.
- You can preview the routes and delete any if it is not required.
- Routes can also be filtered based on Start date and End date.

- You can also apply various filters on route by clicking on “Options” dropdown. Various filters related to Distance are:



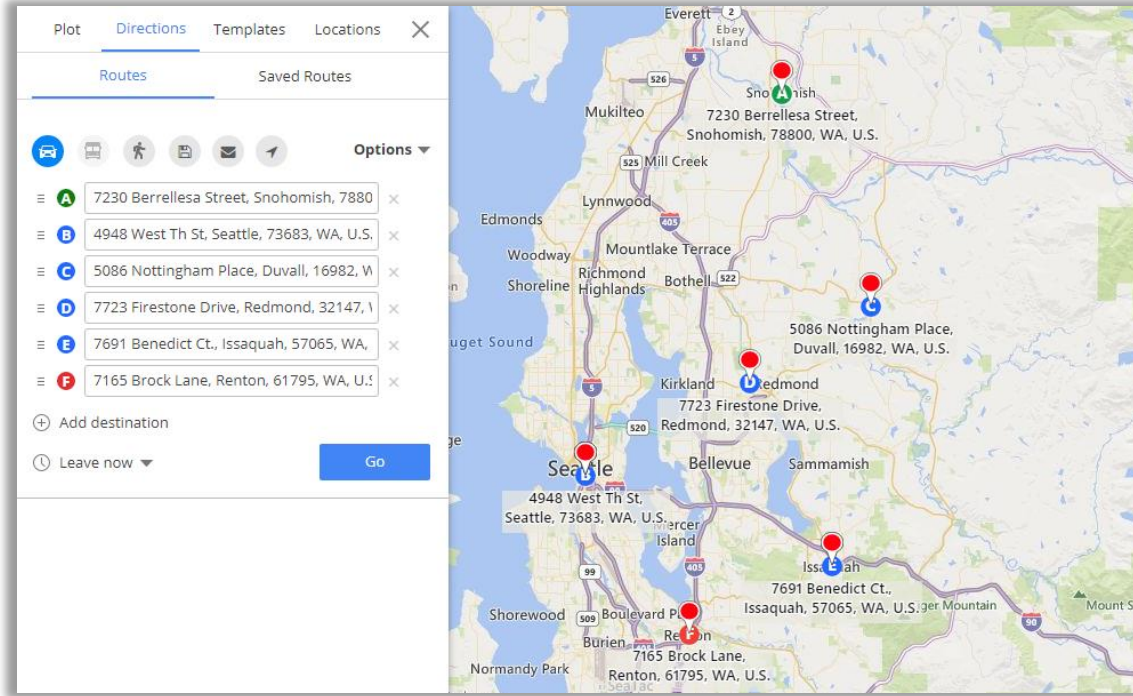
- Miles/KM
- Directions: Shortest Time/ Distance
- Avoid Highways
- Avoid Tolls
- Avoid Ferries
- Along the Route Search

- Selecting **along the route** search option prompts user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of plotted route and displays pin in different colors than that which are within the route.

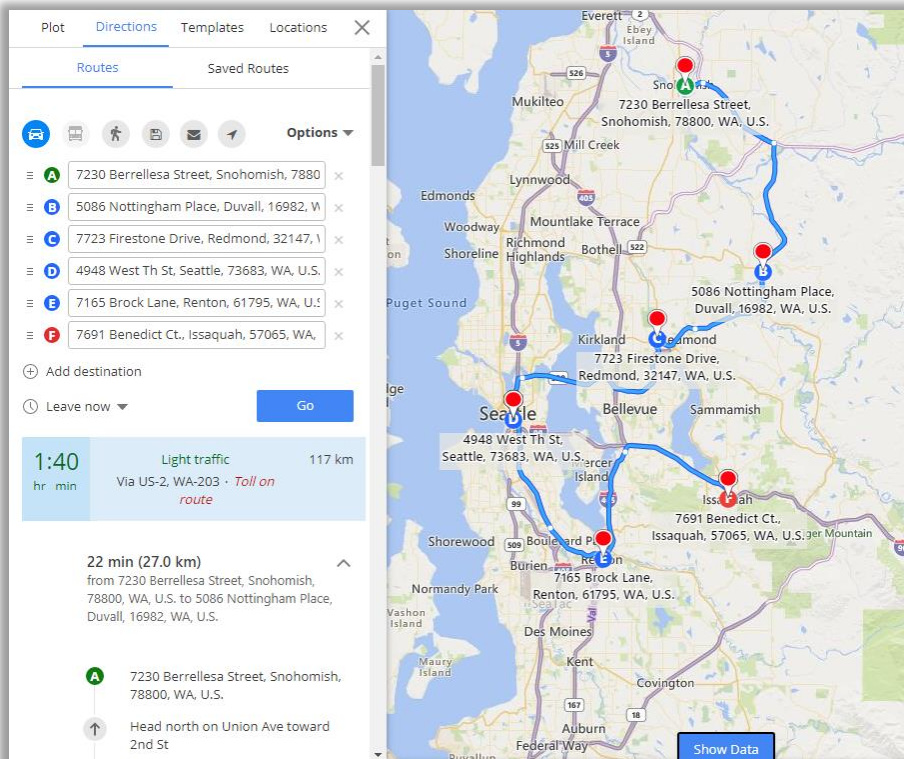
## SPF (Shortest Path First)

- If Route optimization is enabled from Configuration, then it will sort the added routes with SPF algorithm. It can rearrange route according to their distance from each other.

### Before SPF



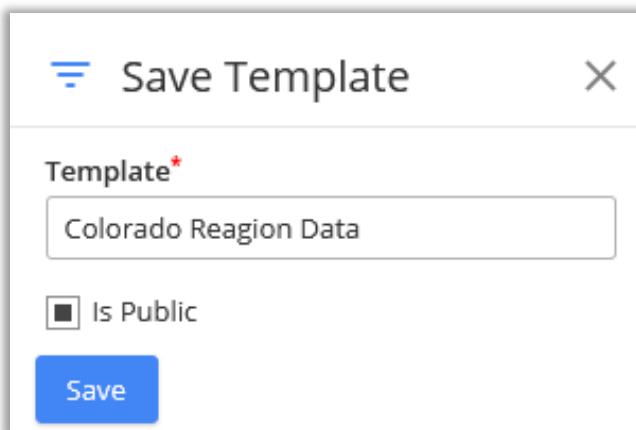
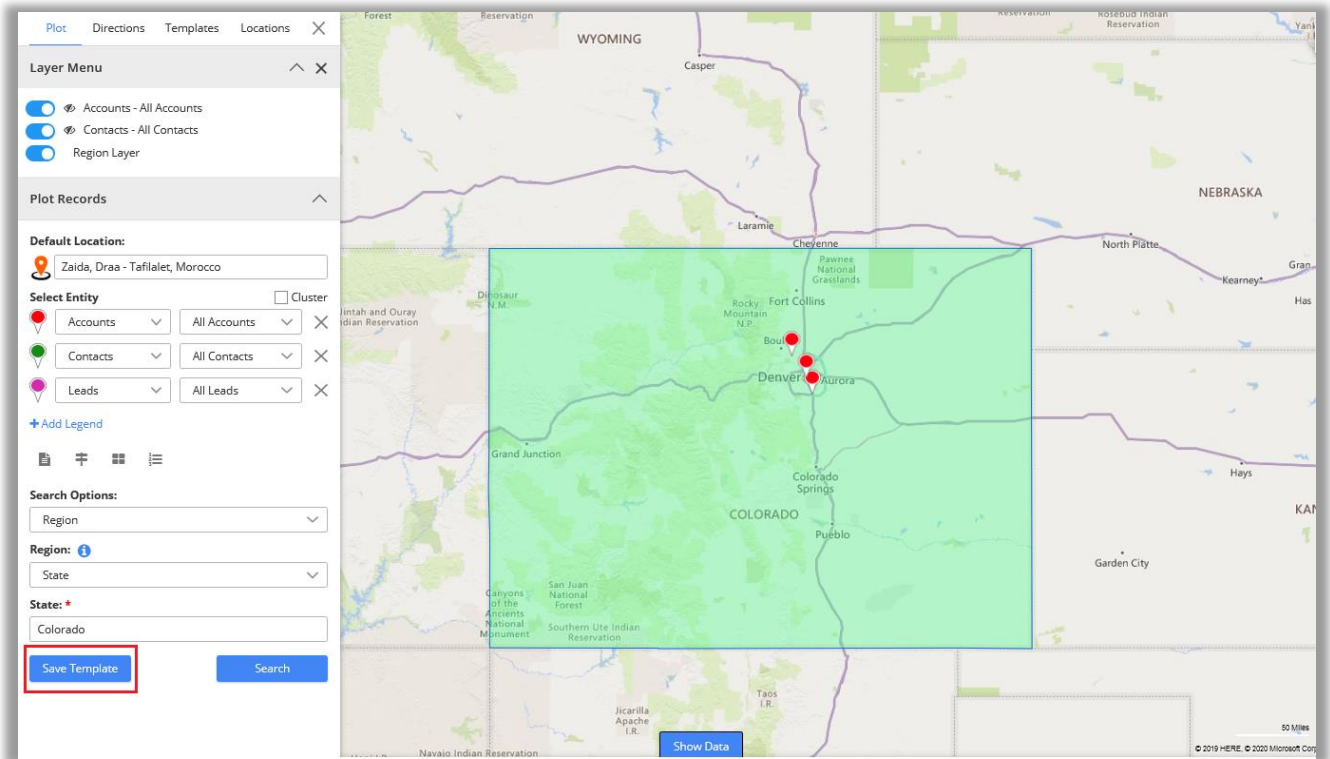
### After SPF



**Note:** If you have enabled the SPF from the Default Configuration, only then SPF algorithm gets applied on the route.


## Templates

- Templates feature helps you save map configurations so that you can come back to them later and tweak them according to requirement.



- If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

**Note:** If template is not public, only admin and the user who created that template will be able to view it.

- Under Templates section, logged in users can see all the templates created by them or the templates that are made public.
- The templates can be previewed by clicking on View icon  or You can delete as per your requirement.



Plot

Directions

Templates

Locations







✕

Show

10


▼

entries

Map Templates	Action
Coloradio Region Data	 
Texas Region Data	 
Washington Region Data	 

Showing 1 to 3 of 3 entries

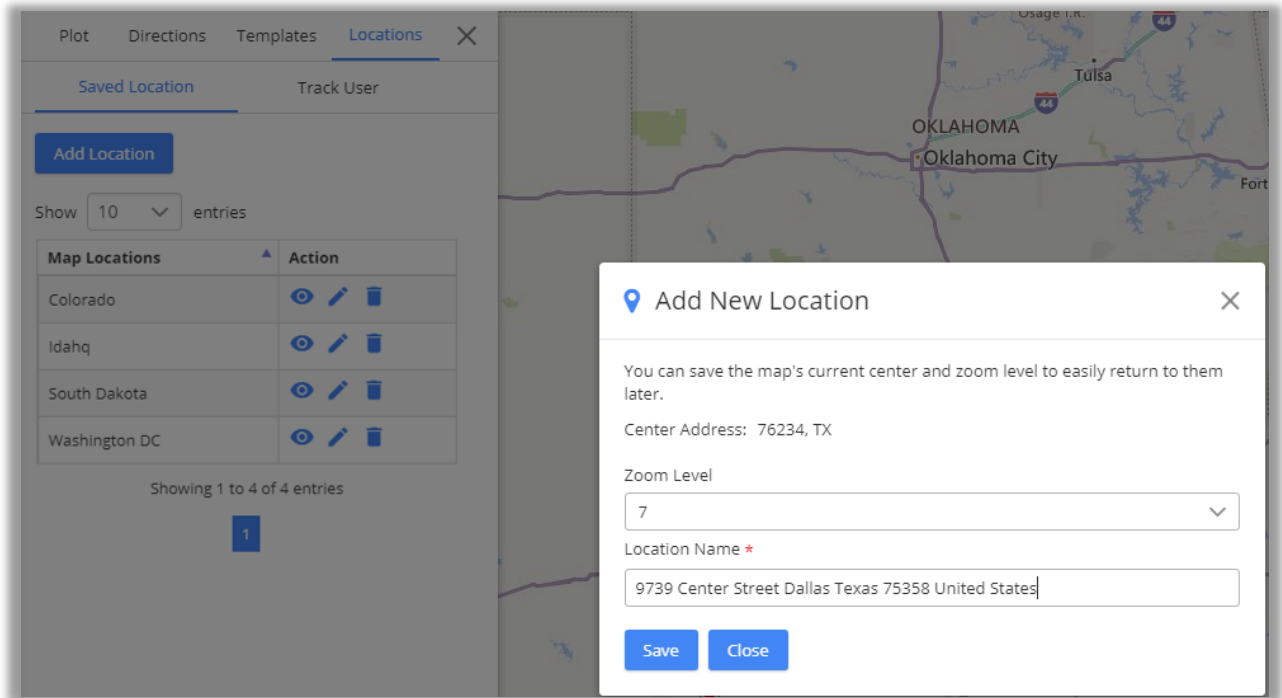
1



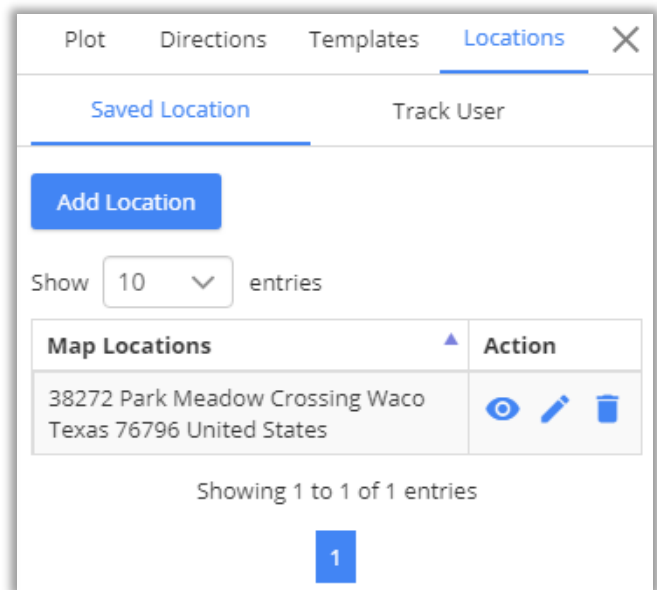
## Locations

### Add New Location

- From the “Locations” tab, the user can save the current location by clicking on the **Add Locations** button. So that later they can come back when required.



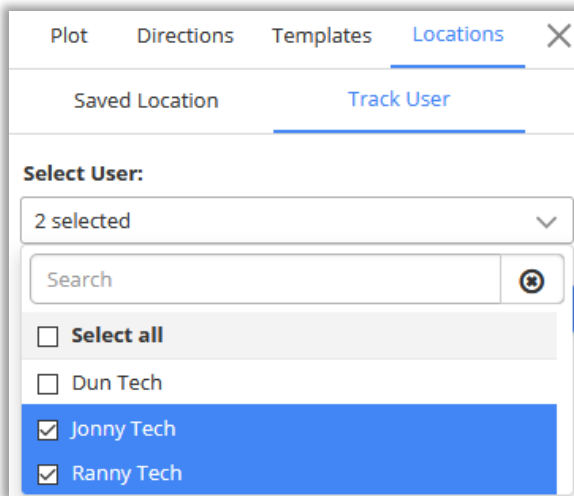
- By clicking on the Add Location button, Add New Location popup will appear.
- The Zoom level will be selected as per the Map view and enter **Location** Name. Click on “**Save**” button to add location.



- Later, the user can also View, Edit or Delete location from action tab in location listing.



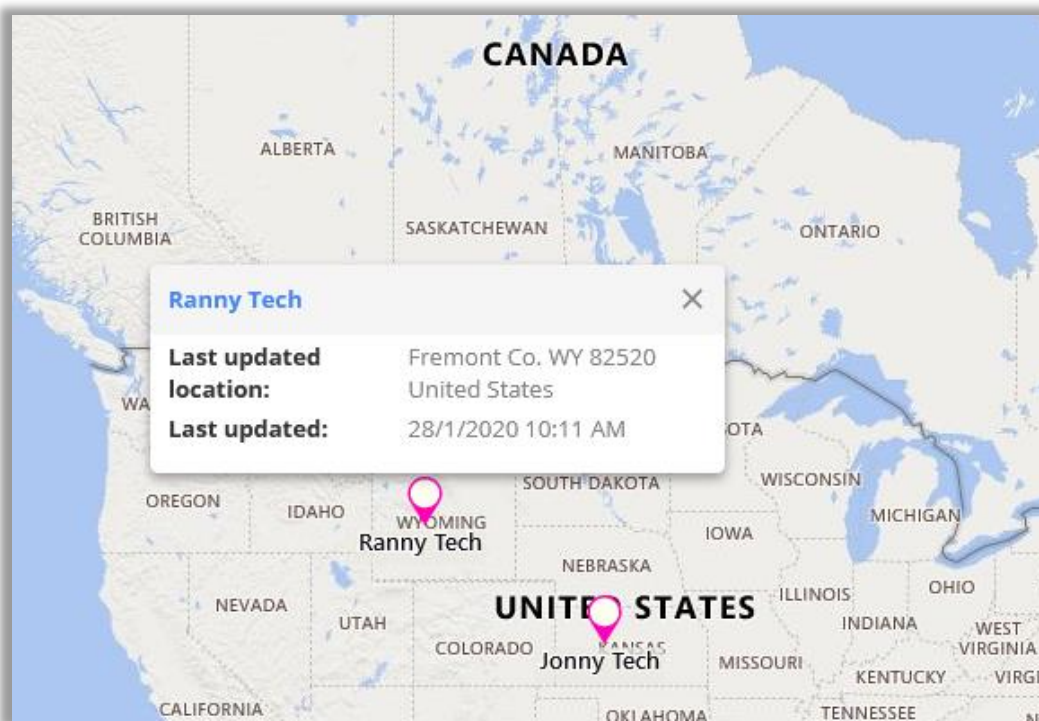
### Track User



- You can track all CRM users which are logged in on MappyField 365.
- Select the users to track them.
- By selecting the Users and click on **Search** button, User tracking details can be seen on the map.

**Note:** Track User Option only visible to admin user.

- You can get the details of **Last updated location** and **time** by clicking on Pin.

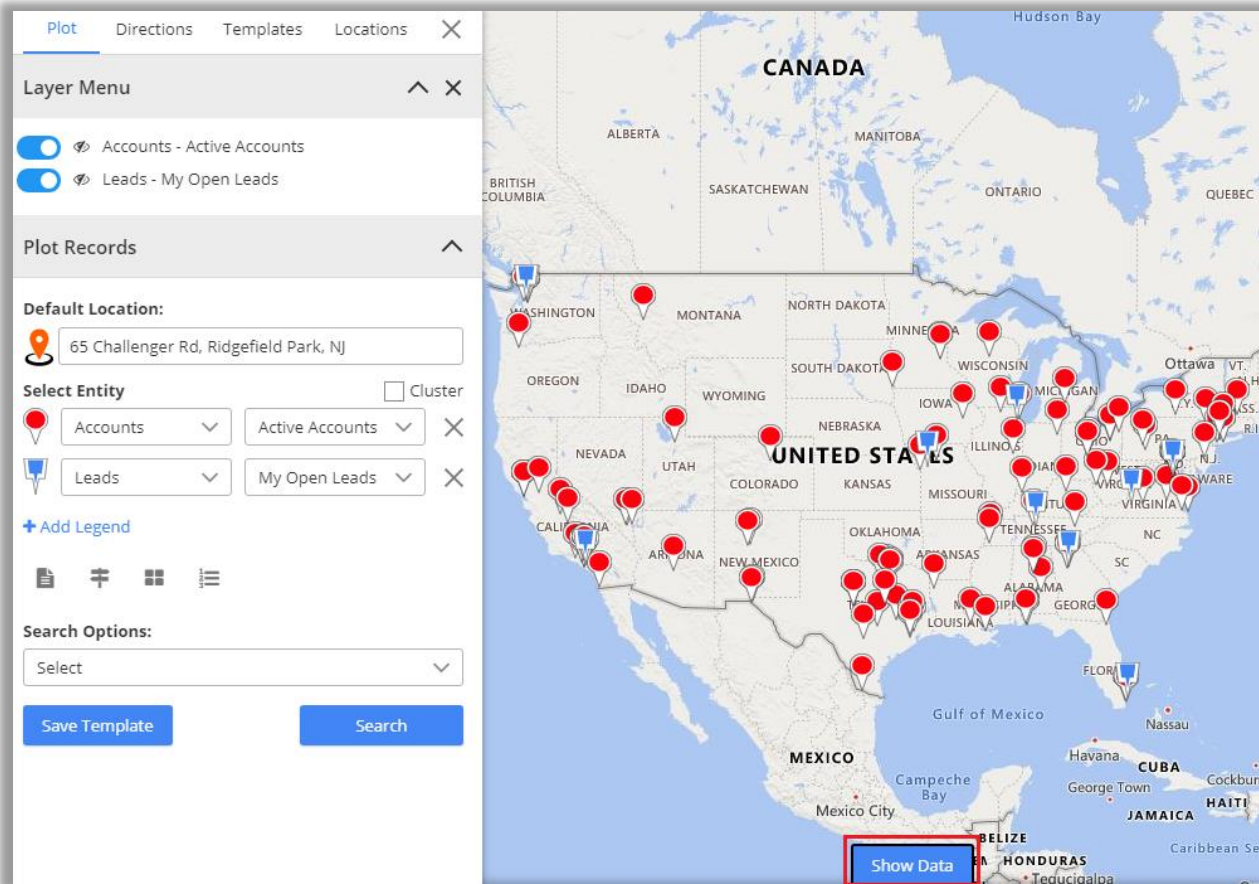


**Note:** Following conditions needs to be fulfilled in order to track user's location

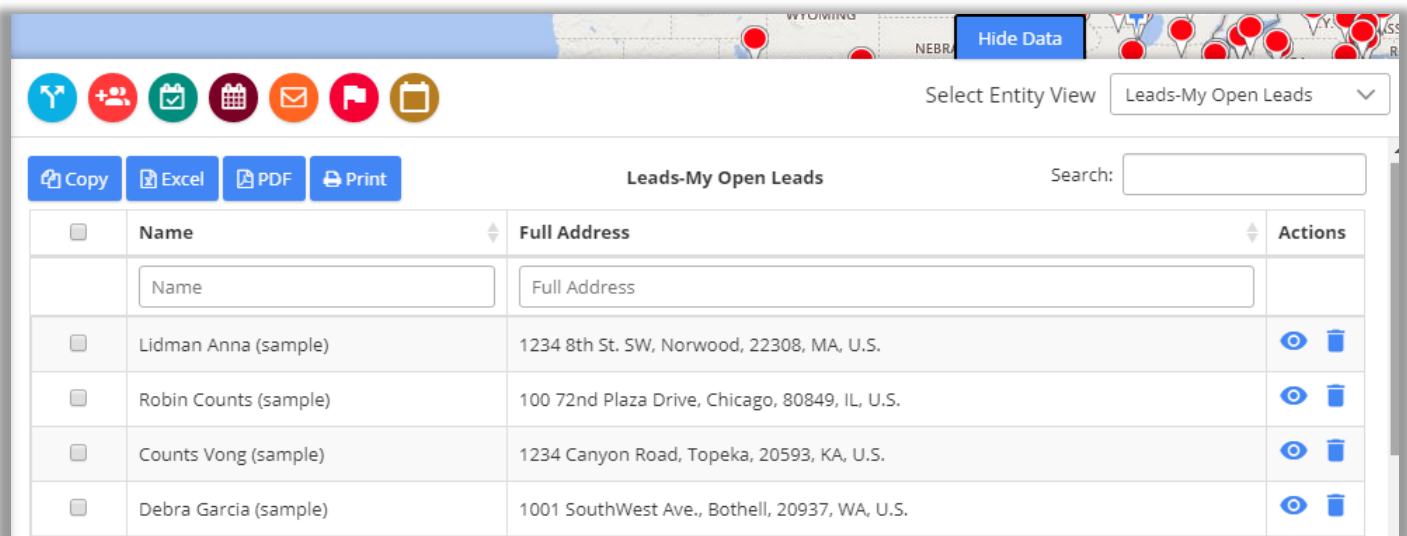
- Enable user tracking must be enabled from default configuration.
- User must have MappyField 365 role *or* able to access MappyField 365 and must be logged in to MappyField 365.
- User must allow location access from mobile *or* web through which user is using MappyField 365.
- MappyField 365 must be open in order to track user's location.
- In Every 5 Mins, Users' location will be updated.

## Data Grid

- **Data Grid** provides listing of records which are plotted on the map.
- To view data grid, click on **Show Data**.



- By clicking on **Show Data**, a slider will open. You can view the plotted data as per selection of Entity.



- You can perform different actions by selecting the data grid records:

> Add Record To Route      > Change owner      > Add Task      > Add Appointment  
> Send Email      > Manage Territory      > Schedule Records

Select Entity View: Leads-My Open Leads

Copy Excel PDF Print

	Name	Full Address	Actions
	Name	Full Address	
<input checked="" type="checkbox"/>	Lidman Anna (sample)	1234 8th St. SW, Norwood, 22308, MA, U.S.	
<input checked="" type="checkbox"/>	Robin Counts (sample)	100 72nd Plaza Drive, Chicago, 80849, IL, U.S.	
<input type="checkbox"/>	Counts Vong (sample)	1234 Canyon Road, Topeka, 20593, KA, U.S.	
<input type="checkbox"/>	Debra Garcia (sample)	1001 SouthWest Ave., Bothell, 20937, WA, U.S.	

- Data in **Data Grid** is displayed according to entity selected in the dropdown. Based on selected entity, data will be updated in grid. In the dropdown list, you will get only those entities which are selected to plot the record on map.

Select Entity View: Leads-My Open Leads

Copy Excel PDF Print

	Name	Full Address	Actions
	Name	Full Address	
<input checked="" type="checkbox"/>	Lidman Anna (sample)	1234 8th St. SW, Norwood, 22308, MA, U.S.	
<input checked="" type="checkbox"/>	Robin Counts (sample)	100 72nd Plaza Drive, Chicago, 80849, IL, U.S.	
<input type="checkbox"/>	Counts Vong (sample)	1234 Canyon Road, Topeka, 20593, KA, U.S.	
<input type="checkbox"/>	Debra Garcia (sample)	1001 SouthWest Ave., Bothell, 20937, WA, U.S.	

- Copy:** By clicking on the Copy button, all or selected records are copied onto the clipboard to be pasted anywhere you want.
- Excel:** Clicking on Excel button downloads all or selected records available in data grid in xlsx file format.
- PDF:** By clicking on **PDF** button, all or selected records present in grid are downloaded in PDF file format.
- Print:** Print button helps you to take print of selected or all records present in data grid.
- By clicking on **View** icon , that record will get opened in CRM. By clicking on **Delete** icon , it deletes the respective record from the CRM.

- You can perform actions by **selecting records** within the data grid as shown below:

Add Record to Route

- Select the records and click on the “Add Record to Route” icon to add the records to the route.

	Account Name	Full Address	Owner	
<input checked="" type="checkbox"/>	Alpine Ski House (sample)	2313 B Southampton Rd, Missoula, 58047, TX, U.S.	Aeron Unite	
<input type="checkbox"/>	Amalia Kitcher	61224 Briar Crest Court, Pasadena, 91125, California, United States	Shein Unite	
<input checked="" type="checkbox"/>	Amitie Zupo	38272 Park Meadow Crossing, Waco, 76796, Texas, United States	Shein Unite	
<input checked="" type="checkbox"/>	Analiese Gadman	46 Vahlen Parkway, Pensacola, 32526, Florida, United States	Shein Unite	
<input checked="" type="checkbox"/>	Angelina Autie	9739 Center Street, Dallas, 75358, Texas, United States	Shein Unite	

Showing 6 to 10 of 109 entries 7 rows selected

Previous 1 2 3 4 5 ... 22 Next

Plot **Directions** Templates Locations

Routes Saved Routes Scheduled Routes

Options

A 2137 Birchwood Dr, 78214, Redmond, W ×

B 46 Vahlen Parkway, 32526, Pensacola, Fl ×

C 9739 Center Street, 75358, Dallas, Texas, ×

D 38272 Park Meadow Crossing, 76796, W ×

E 2313 B Southampton Rd, 58047, Missoul ×

F 90406 Hoffman Way, 78250, San Antonic ×

G 4405 Balboa Court, 95486, Santa Cruz, T ×

+ Add destination Go

- By clicking on that icon, the Menu tab on the left appear opening the Direction Tab.
- The locations will be added based on the record selection in Data Grid.

**Note:** If you proceed to perform any action from data grid without selecting any record, you will get the **Alert** message that will prompt you to select the record.

### Assign to User/Team:



**Assign to User or Team**

Select user or team to assign this record

User/Team: Aeron Unite

Assign Cancel

Search

**Users**

- ☒ Aeron Unite
- ☐ Nyasha Unite
- ☐ Roshel Unite
- ☐ Shein Unite

- You can directly assign the selected record to the User / Team.
- As you click on that icon, the **Assign to User or Team** popup window will open to select the User/Team.
- After selecting User/Teams, click on **Assign** button.

### Add Task:



**Add Task**

Subject: \*

Urgent Sales Demo

Start Time: \*

05-02-2020 06:33 PM

End Time: \*

05-02-2020 07:03 PM

Priority:

High

Description:

Sales Demo as per their Business Type.

Create

- You can add the Task of selected records by clicking on **Add Task** icon.
- As you click on that icon, the **Add Task** popup window will open to insert the Task related details.
- After clicking on **Create** button, Task will be added.

- Similarly, you can add the Appointment of selected records by clicking on **Add Appointment** icon.



## Send Email using Template

A white popup window titled "Send Email" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Select Email Template" containing a dropdown menu with "New Email" selected and a downward arrow. At the bottom of the window is a blue button labeled "Send Email".

- Send **Email** by selecting the records.
- As you click on Email icon, the Send **Email** popup window will open. You need to select the Email Template.
- By selecting an email template, you can send the Email on the email ids of the selected records.
- By clicking on **Send Email** button the email page will be redirected.

## Manage Territory

A white popup window titled "Manage Territory" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Territory" containing a dropdown menu with "Demo as per Telephonic Inquiry" selected and a downward arrow. Below the dropdown is a search bar with the text "Search" and a magnifying glass icon. Below the search bar is a list of options: "Demo as per Telephonic Inquiry" (selected with a blue background and a radio button), "New Sales", "Sales Demo", and "Sales Reps".

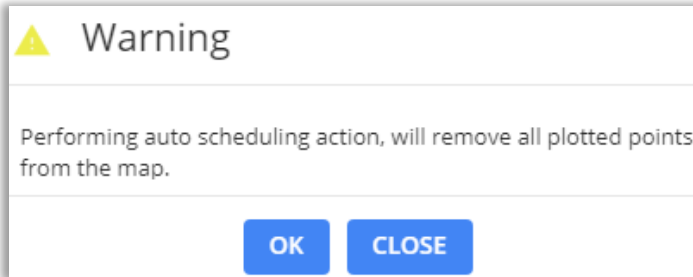
- From the Data Grid, you can add your selected records in the particular Territory.
- As you click on Territory icon, the **Mange Territory** window will open.
- You need to select the Territory and after that click on **Save** button.
- Here you will get the dropdown list of the Territories as per Adding and Managing Territories.



## Auto Schedule Records



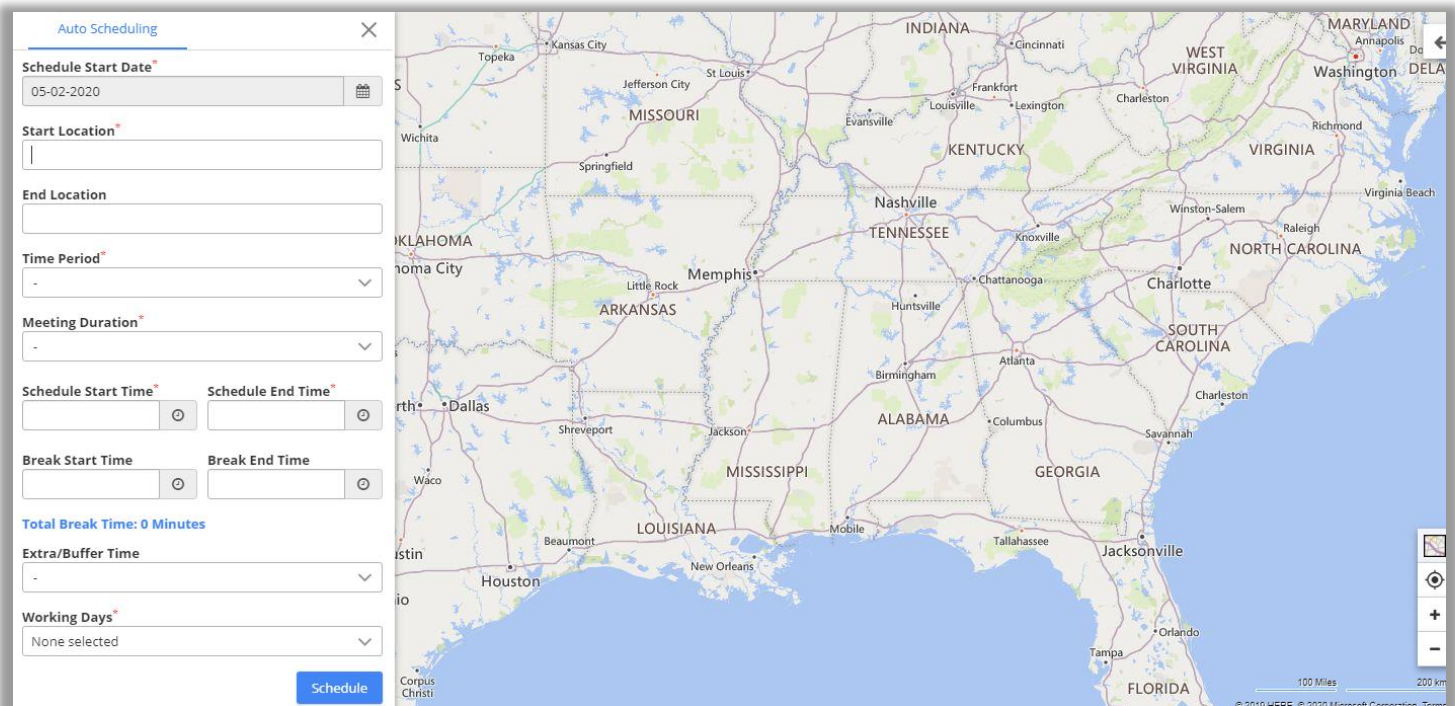
- You can **auto schedule** the selected records by clicking on this icon.



- As you click on it, the warning message will appear that just inform that the plotted records will be cleared on the map.

## Auto Schedule Records

- You will find the **Auto Schedule Records** option in Data Grid only. Select the required data from the Data Grid and click on **Auto Schedule** icon.
- You will be redirected to Auto Scheduling with its slider in left side. In map configuration Auto scheduling configuration will be there according to set values. In configuration, data will be filled in Auto scheduling popup.





**Auto Scheduling**

**Schedule Start Date\***  
06-02-2020

**Start Location\***  
38272 Park Meadow Crossing, Waco, 76796, Texas, United States

**End Location**  
90406 Hoffman Way San Antonio Texas 78250 United States

**Time Period\***  
5 Day

**Meeting Duration\***  
60 Minutes

- **Time Period:** Select Time duration, Total working days/week/month. (Mandatory field)
- **Start Location:** Insert your starting location from where you want to start the schedule. (Mandatory field)
- **End Location:** Insert your ending location where your scheduling end.
- **Time Period:** Select day/days for Auto Schedule.
- **Meeting Duration:** Select the time for each plotted record for meeting or appointment.

- **Schedule Start Time:** Select Starting Time of the day.
- **Schedule End Time:** Select Ending Time of the day.
- **Break Start Time:** Select Break Start time in between scheduled time.
- **Break end time:** Select Break End time in between scheduled time.
- **Extra/Buffer Time :** Select time for a day for extra work.

**Schedule Start Time\***  
9:00 AM

**Schedule End Time\***  
5:00 PM

**Break Start Time**  
12:30 PM

**Break End Time**  
1:16 PM

**Total Break Time: 46 Minutes**

**Extra/Buffer Time**  
20 Minutes

**Working Days\***

4 selected

☐ Select all

☐ Sunday

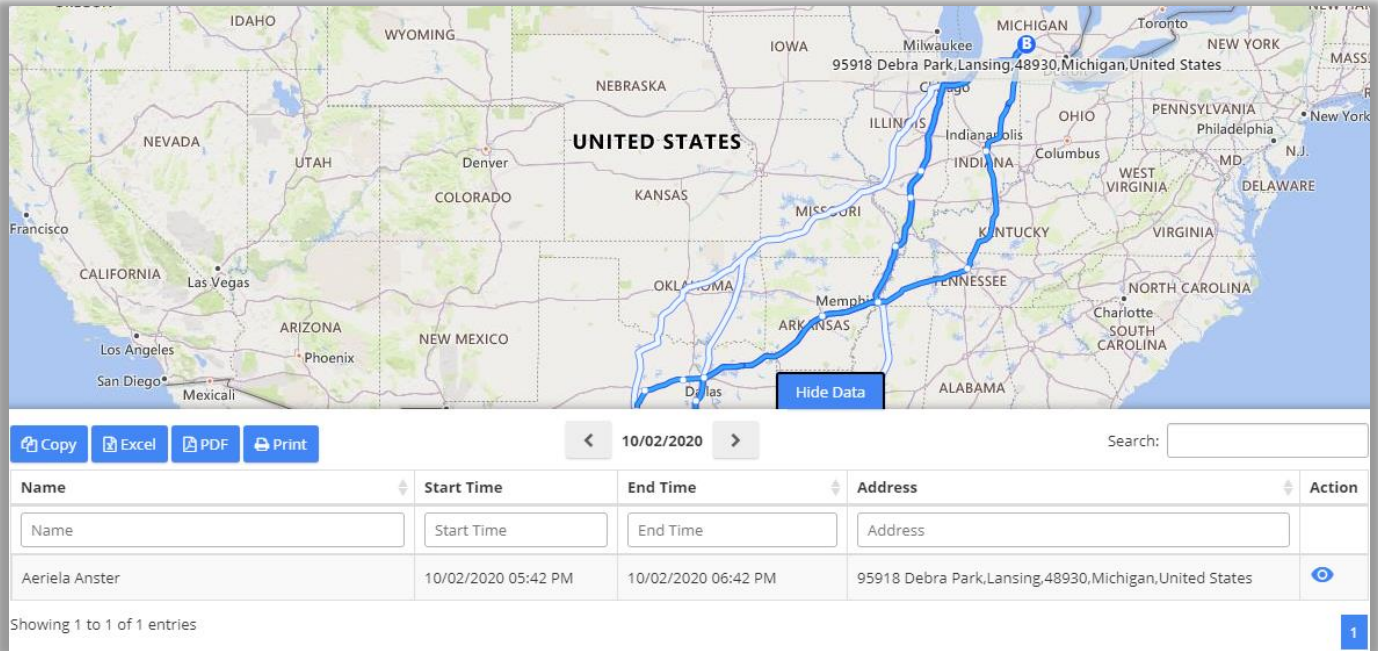
☒ Monday

☒ Tuesday

☐ Wednesday

☒ Thursday

- **Working Days:** Select days for working.  
You will get the date wise schedule as per selection of Time Period and you will get the date wise schedule as per selected days.



- If your activity is starting from date of **6<sup>th</sup> Feb** (Thu.), Time period is **5 days** and selected **Days** are: Monday, Tuesday, Thursday and Friday. You will get the date as per the selection of the days. Wednesday will be skipped.

**Meeting Duration\***

30 Minutes

**Schedule Start Time\*** 9:00 AM

**Schedule End Time\*** 5:00 PM

**Break Start Time** 12:30 PM

**Break End Time** 1:16 PM

**Total Break Time: 46 Minutes**

**Extra/Buffer Time**

20 Minutes

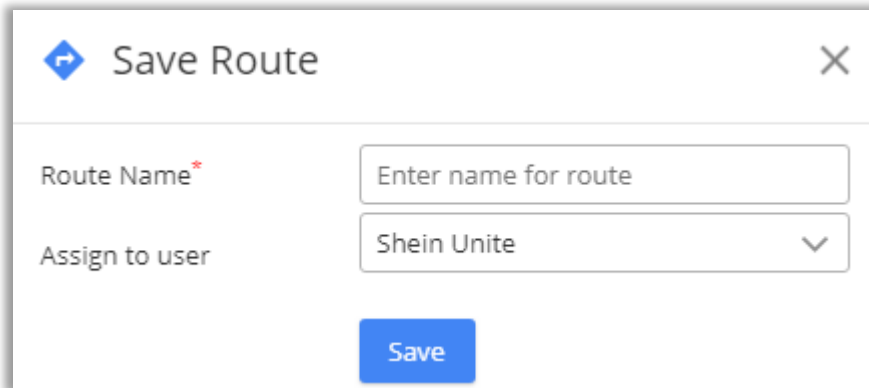
**Working Days\***

4 selected

**Save schedule** **Schedule**

- You can save the schedule by clicking on **Save Schedule**.

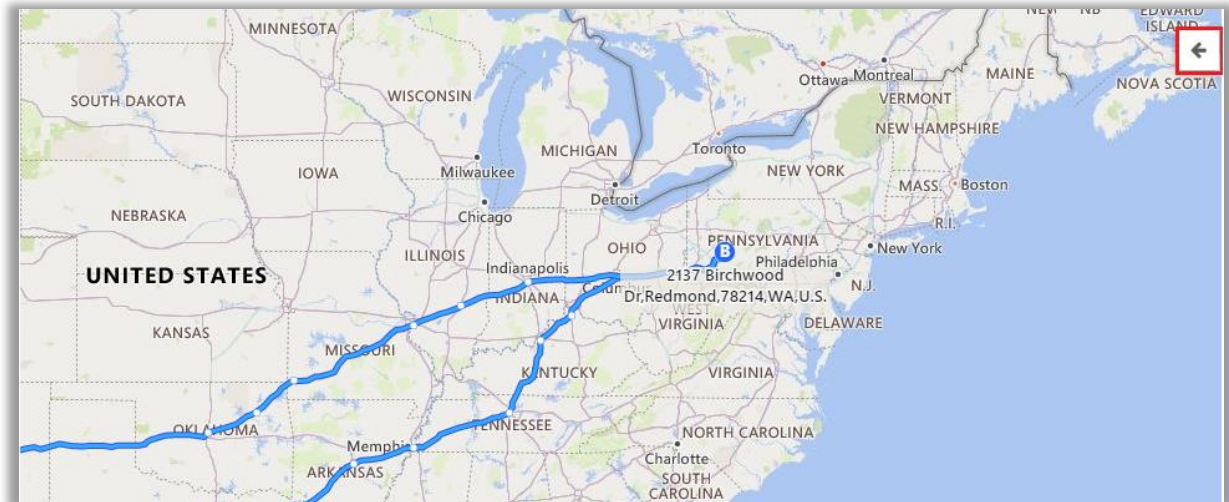
- As you click on Save Schedule button, the **Save Route** popup will appear. Enter 'Route Name' and 'assign' it to user by selecting user from the dropdown.










The 'Save Route' popup form contains the following fields:

- Route Name\***: A text input field with the placeholder text 'Enter name for route'.
- Assign to user**: A dropdown menu currently showing 'Shein Unite'.
- Save**: A blue button at the bottom.

- Now you can redirect to main page of map by clicking on 'left arrow' icon.

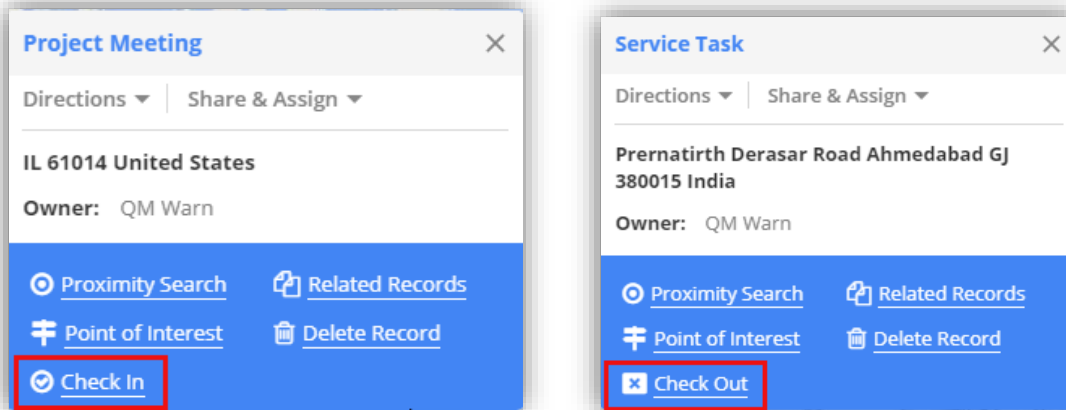


Plot	Directions	Templates	Locations
Routes	Saved Routes	Scheduled Routes	
Show	10	entries	
Route Name	Route Date	Assigned By	Action
Sales Demo	2/6/2020	Shein Unite	 
Sales Demo	2/10/2020	Shein Unite	 
Sales Demo	2/7/2020	Shein Unite	 
Showing 1 to 3 of 3 entries			
1			

- You will get the Saved **Scheduled Routes** under the **Direction** tab.
- You can view the Routes by clicking on view  icon.
- Here, you will get the direction based on SPF algorithm.

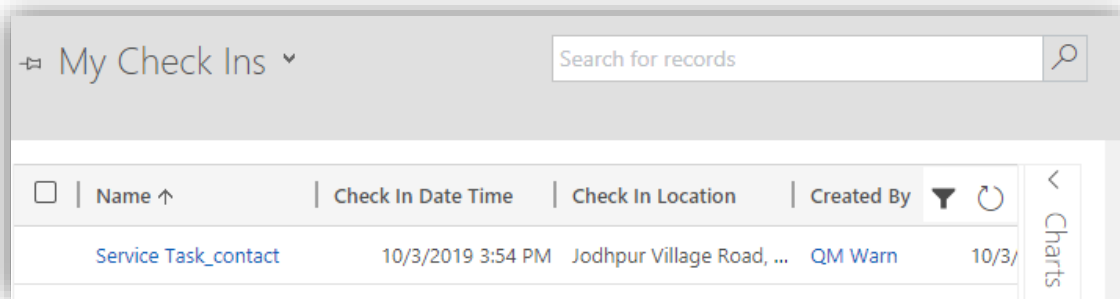
## Check-Ins/Check-Outs

- You can use **check-in** and **check-out** features in the **all activity** entities.
- Check-In feature enables admin/user to keep track of exact time spent behind an activity.
- With the help of check in/check out button, you can tag geo-coordinates of the location and time while starting and completing an activity.
  - To perform check in, click on check in icon available on the info card of an activity.

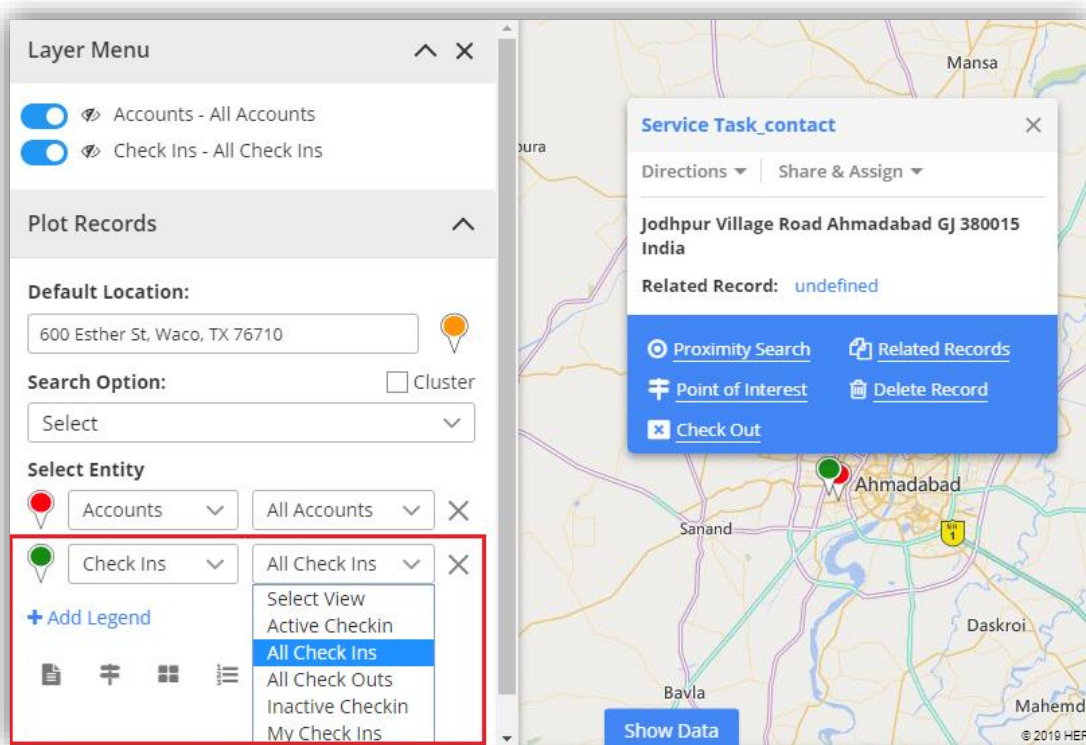


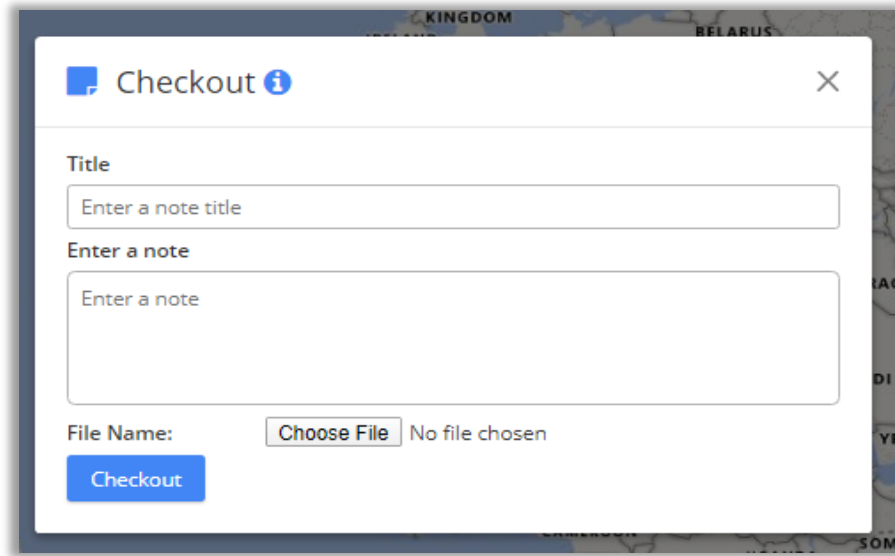
- Once checked in, it would show action button to check out. User can insert the Notes at the time of Check-Out.
- User can Check-In *or* Check-Out from the map by clicking on the activity *or* from the detail view of activities by clicking on the title activity name.

- To check all the Check-Ins record, navigate to **AppJetty tab -> Check Ins**. It will list all the check in records.



- Check-in takes the address of the record regarding an activity and lets you perform check in only when address is found. The user will only be able to check in if they are in the check in radius as configured by the admin.
- On map as well, you can plot check in entity and its corresponding view to have idea of all check ins.

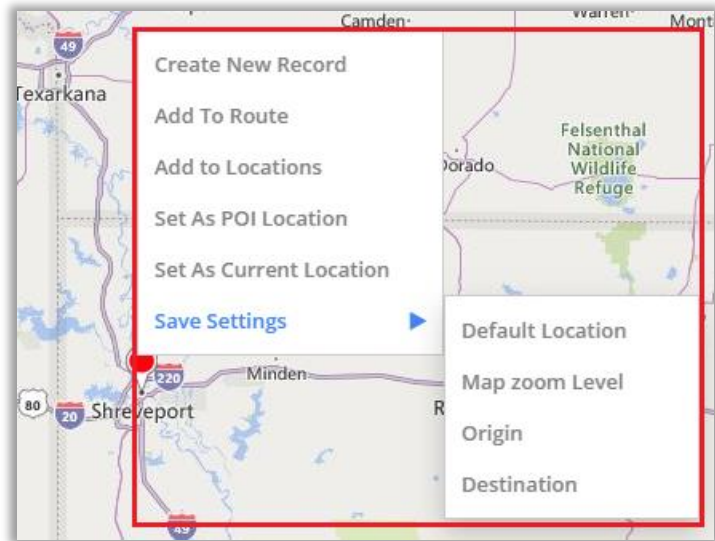




- User can add note and upload the attachment while checking out from the activity.
- You can check the Notes in the Check-Ins module within the Check-Out view from **Note** section.
- It will list all possible route and highlight the optimized route. Also, you can get directions based on means of transport like Driving, Walking and Transit. You can also share route in email using link.

## Contextual Menu

- 'Right click' on to map to open Contextual Menu.



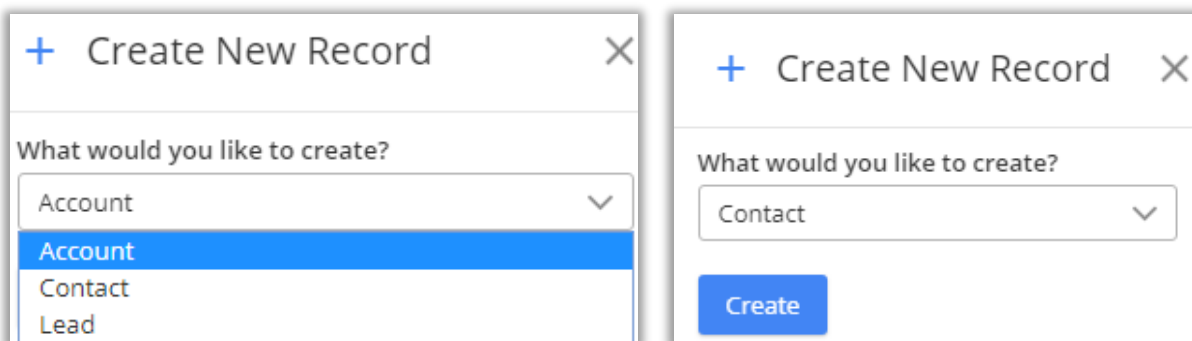
- It provides options as below:

> Create New Record > Add to Route > Add to Locations > Set as POI Location  
> Set As Current Location.

You (or logged in user) can also set default settings by hovering on 'Save Settings' option:

> Default Location > Map zoom level > Origin > Destination.

- These settings directly get saved under MappyField 365 Configuration record for logged in user.
- By selecting Create New Record Option, open a dialog box to select record type.
- It can be Account, Contact or Lead. Upon selection of the option, you are redirected to a particular entity page of record creation.

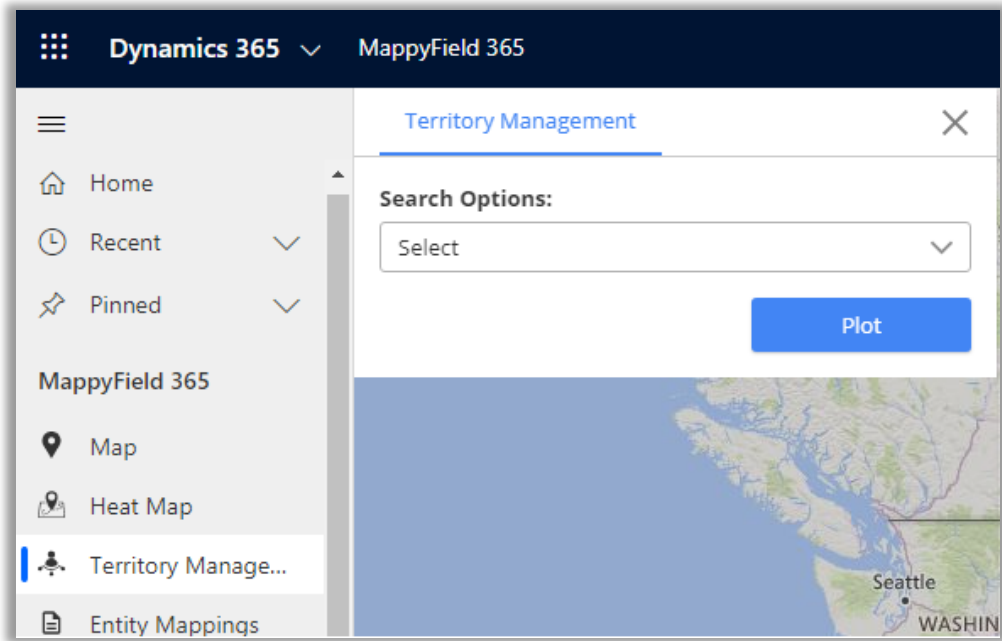


- Similarly, you can perform map view and map records related other actions directly from here.

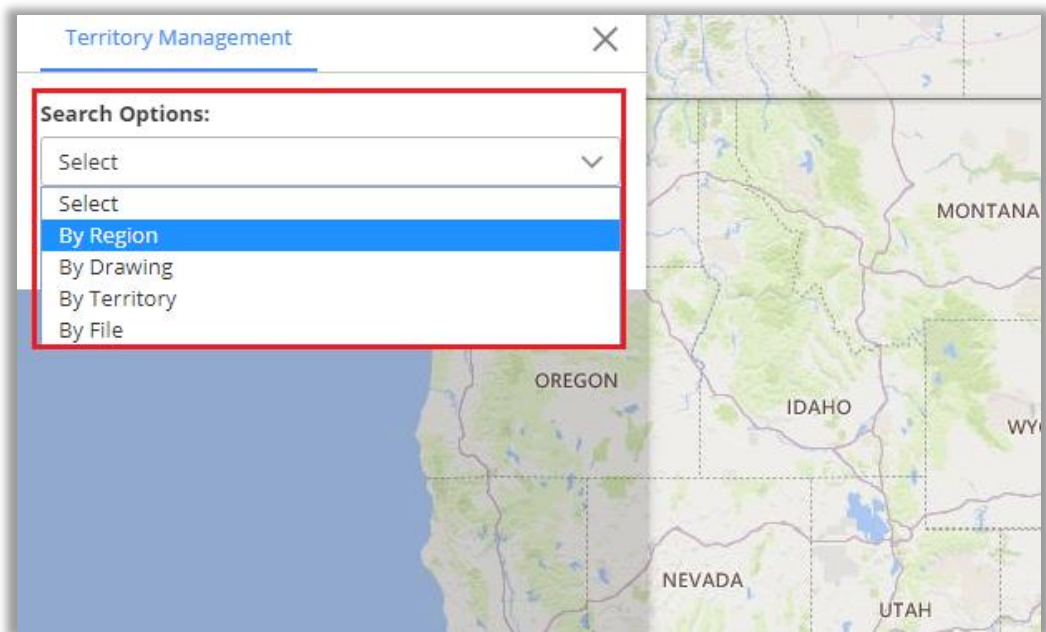


Territory Management

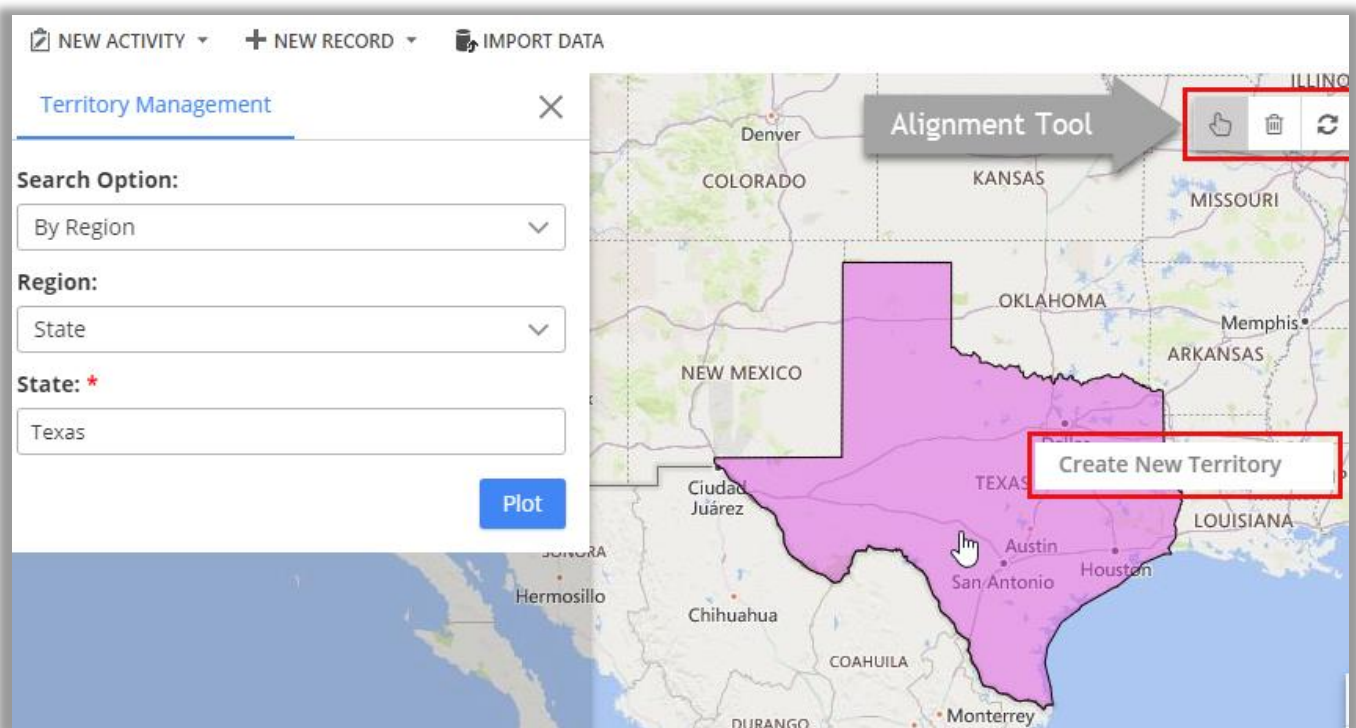
- Using territory management, you can create new territories or manage existing territories directly from the map itself.
- You can plot regions on map based on files, by location of regions, and by drawing. Based on plotted regions, you can use the Alignment tool to select the required regions and create new territories. Also, you can plot the existing territories and copy or move them as required.
- To perform territory management, click on the **Territory Management**.



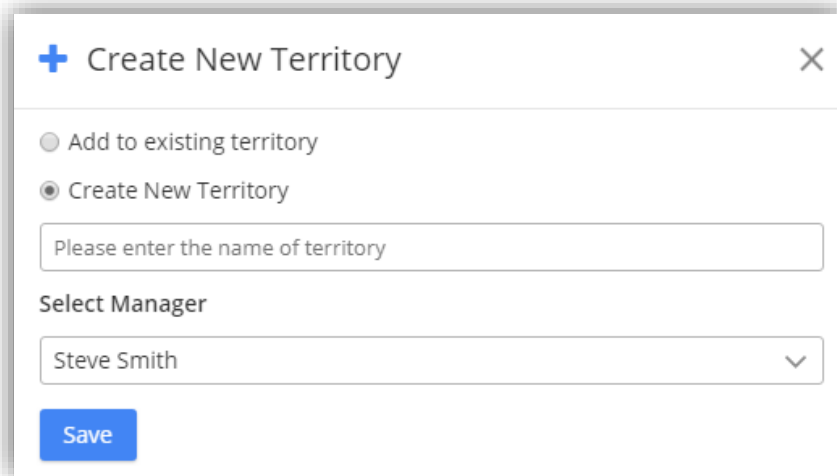
- Different search options available are **By Region, By Drawing, By Territory, By File**.



- **By Region:** This option helps users to search for regions on the map i.e. City, State, Country and Postal Code.
- **By Drawing:** This lets you draw a shape using custom drawing tool: Union, Union Aggregate, Difference, Intersection, Disjunctive Union. You can perform the actions like: Undo, Reset and After performing shape operation user can create new territory of that resulted shape.
- **By Territory:** Using this option, you can plot existing territories on the map.
- **By File:** This option helps in plotting shape files. Supported file types are .shp, .kml, and .geojson.
- After plotting, using territory alignment tool, you can select/deselect territories as required on the map. Using alignment tool, you can select/deselect, remove selection or refresh and download map.

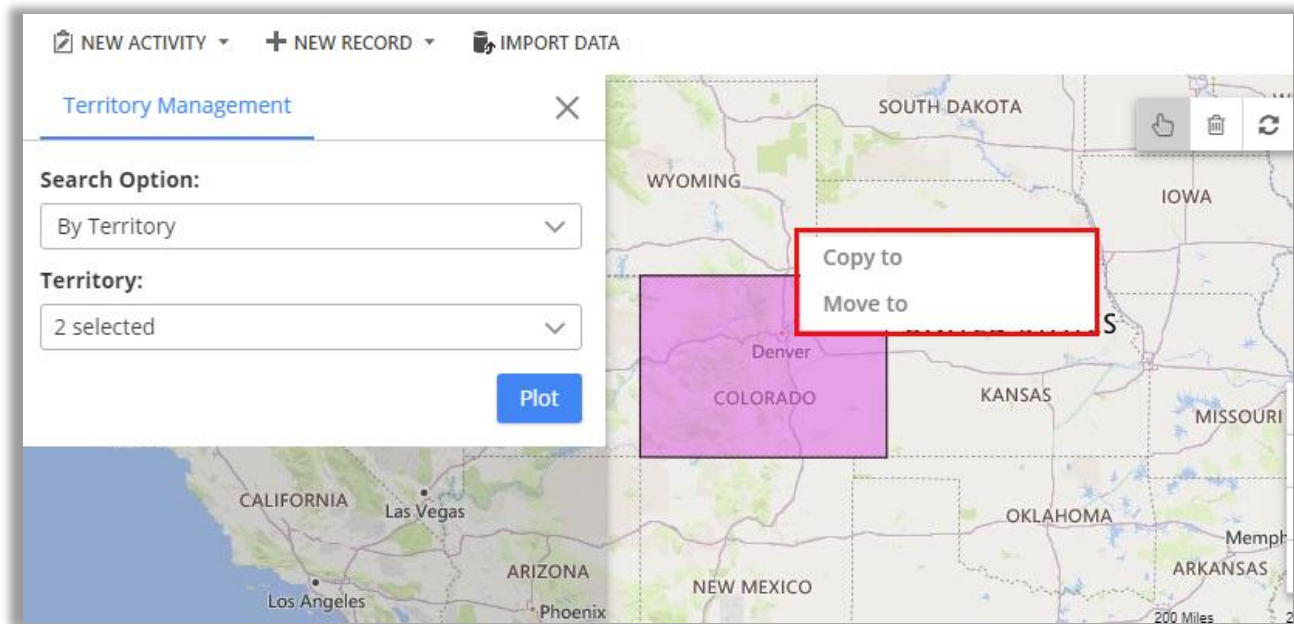


- **Create New Territory:** Select region/shape and right clicking on selected region, it would show option to create new territory.

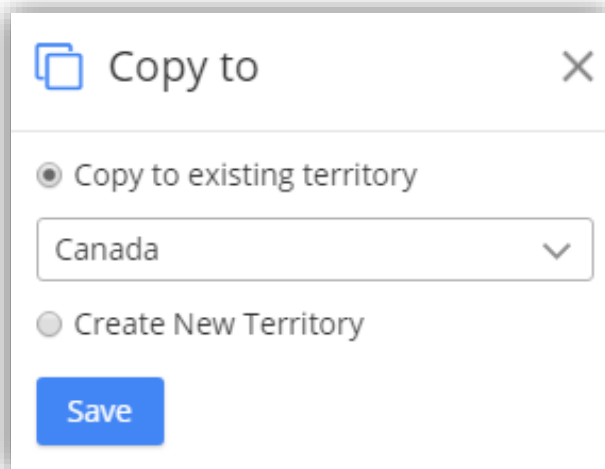


A dialog box titled "Create New Territory" with a close button (X) in the top right corner. It contains two radio buttons: "Add to existing territory" and "Create New Territory", with the latter selected. Below is a text input field with the placeholder "Please enter the name of territory". Underneath is a "Select Manager" section with a dropdown menu showing "Steve Smith" and a downward arrow. At the bottom is a blue "Save" button.

- Clicking on **Create New Territory** would open a dialog box to enter territory name and select manager for a territory. User can also choose to add the new territory within existing territory by selecting **Add to existing territory** option.



- Copy/Move Territory:** Right clicking on selected region/shape that is an existing territory, it would show option to copy or move territory.



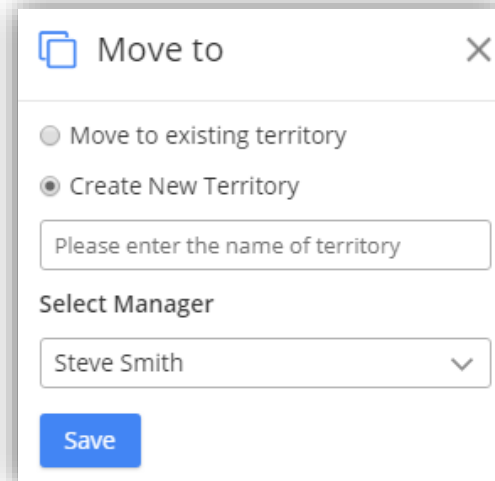
**Copy to**

☒ Copy to existing territory

Canada

☐ Create New Territory

Save



**Move to**

☐ Move to existing territory

☒ Create New Territory

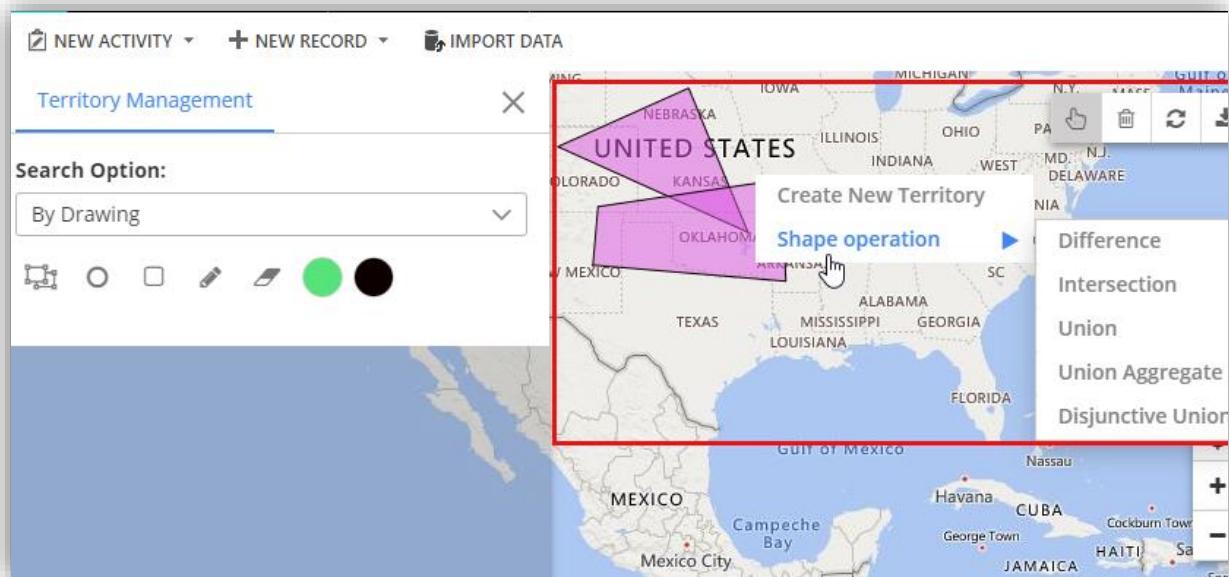
Please enter the name of territory

Select Manager

Steve Smith

Save

- Clicking on **Copy to/Move to** would open a dialog box to select if territory has to be copied/moved to an existing territory or create a new one. In case of new one, it would ask to enter territory name followed with manager selection for the territory.
- Shape Operations:** For drawing shapes plotted on map, user can select shapes that are drawn using drawing tool and right click on them to select binary operations. Five different shape operations available are: Difference, Intersection, Union, Union Aggregate and Disjunctive Union.

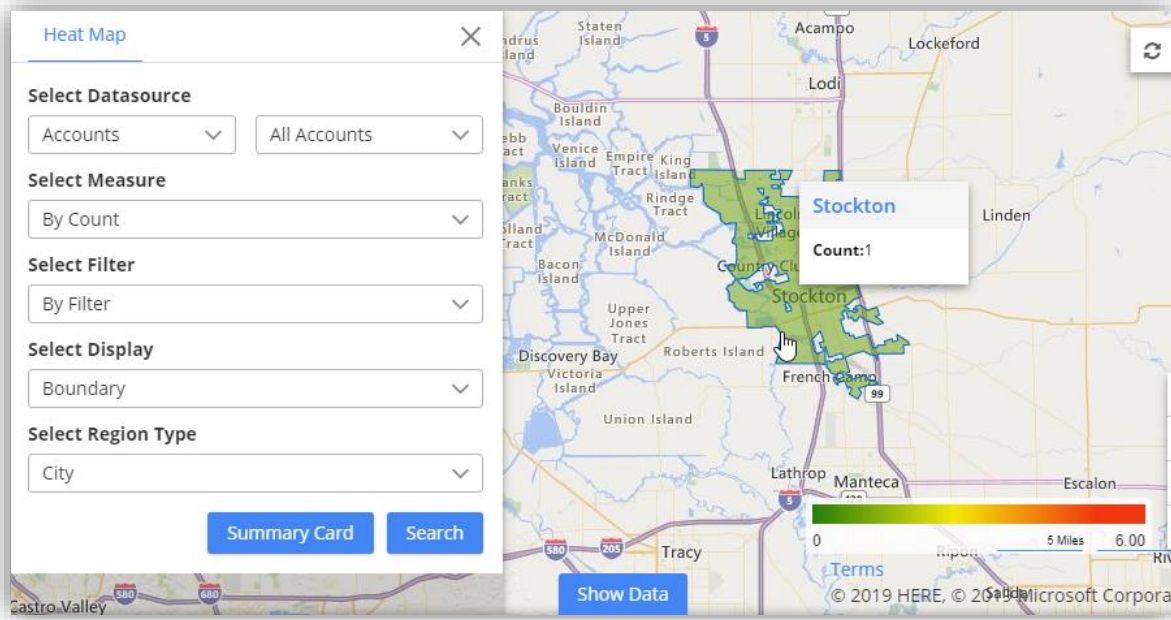


**Note:**

- Shapes should overlap each other for performing shape operations. In order to perform binary operation, shapes should be selected.
- Move To/Copy To works on shapes of plotted territories.

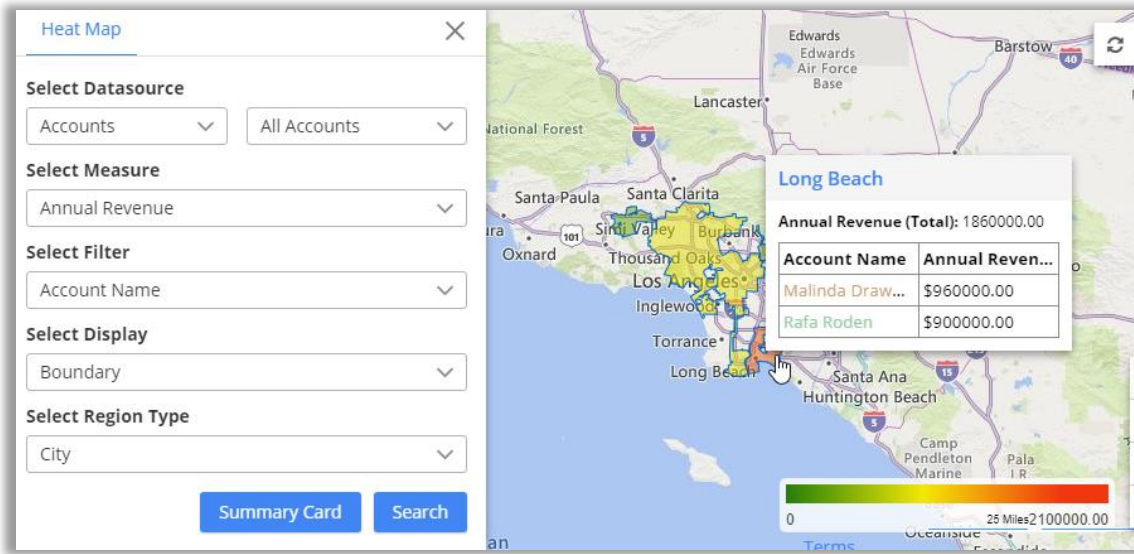
## Heat Map

- Navigate to **AppJetty -> Heat Map**.
- By clicking on Heat Map, Heat Map page will be open with all default configurations and fill up with all the entities which are already configured in “Entity To Map”.

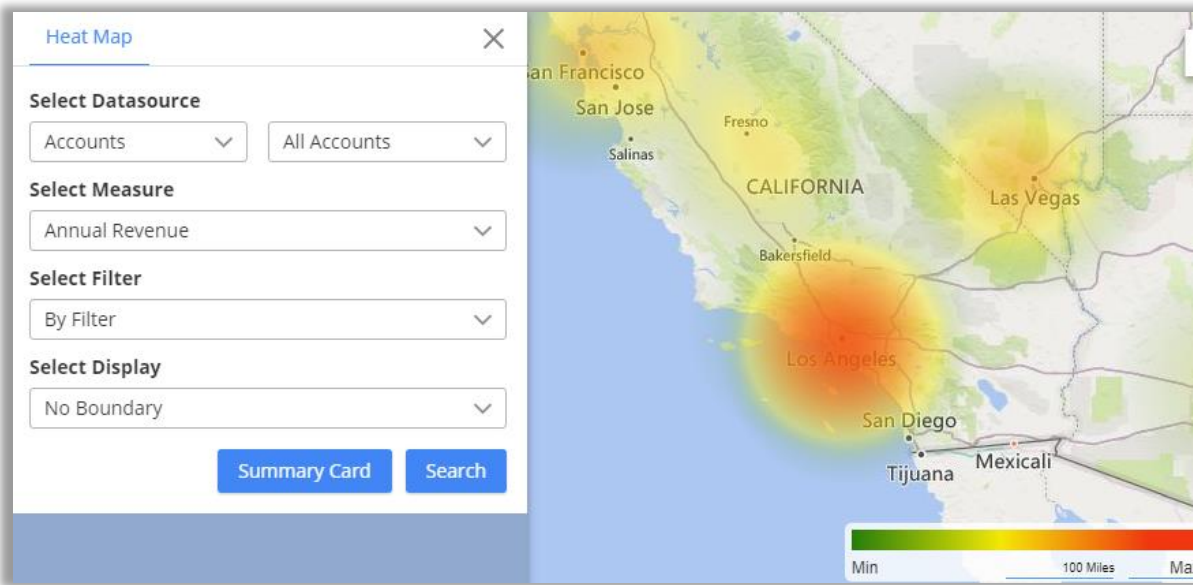


- It would open a map for you to select further map options. Here, it would list all those entities that are configured under Entity Mappings.
- Different options are:
  - **Select Data source:** Choose entity and its view to analyze data.
  - **Select Measure:** Select the aggregation method to be used to color code the region. By default, it would be based on number of records.
  - **Select Filter:** This option lets you select category to filter data results.
  - **Select Display:** You get four different options to analyze data on heat map. Options are:
    - **Boundary:** This creates heat map based on selected region type.

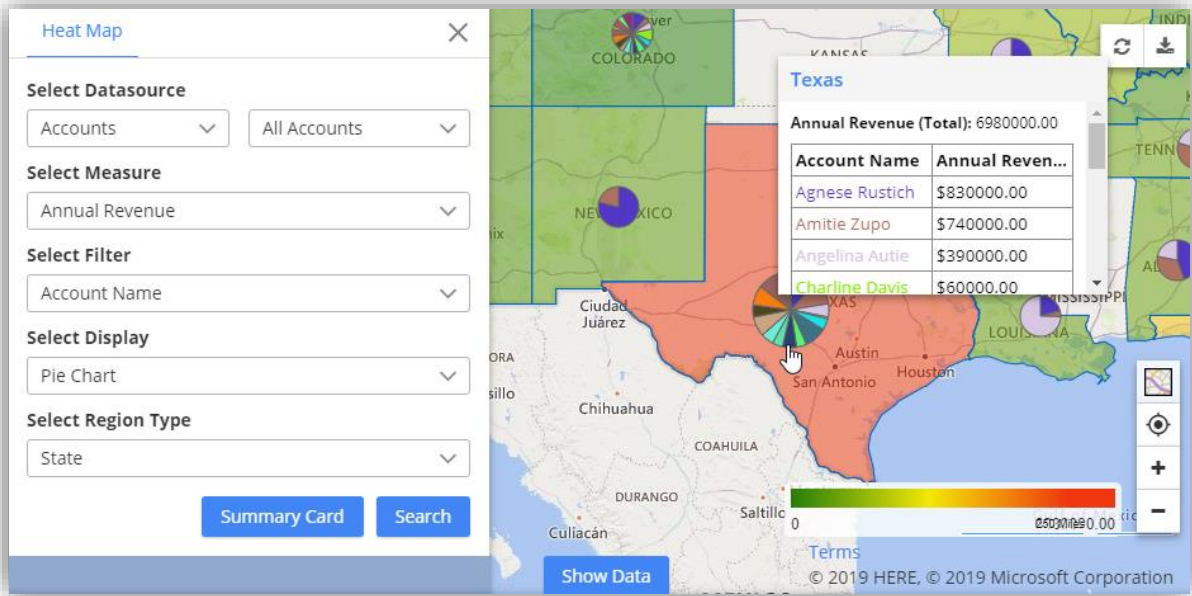




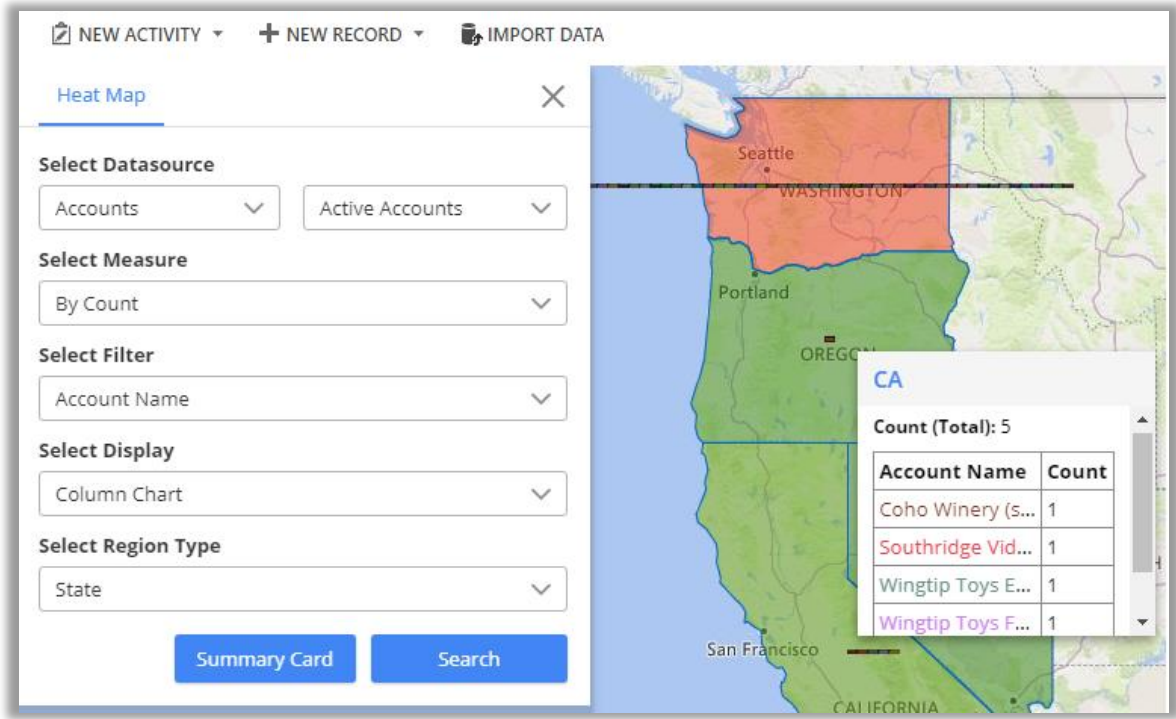
- **No Boundary:** This option creates heat map based on density of the measure selected without geographical boundaries.



- **Pie Chart:** View data in form of pie charts based on attributes selected in measure & filter.



- **Column Chart:** View data in form of column charts based on attributes selected in measure and filter.



- **Select Region Type:** Define geography level of aggregation. It can be any from the city, state, country and postal code.

**Note:** On hover, it shows details of the boundary, pie chart or column chart attributes and clicking on particular highlighted region shows up the summarized information for the same.



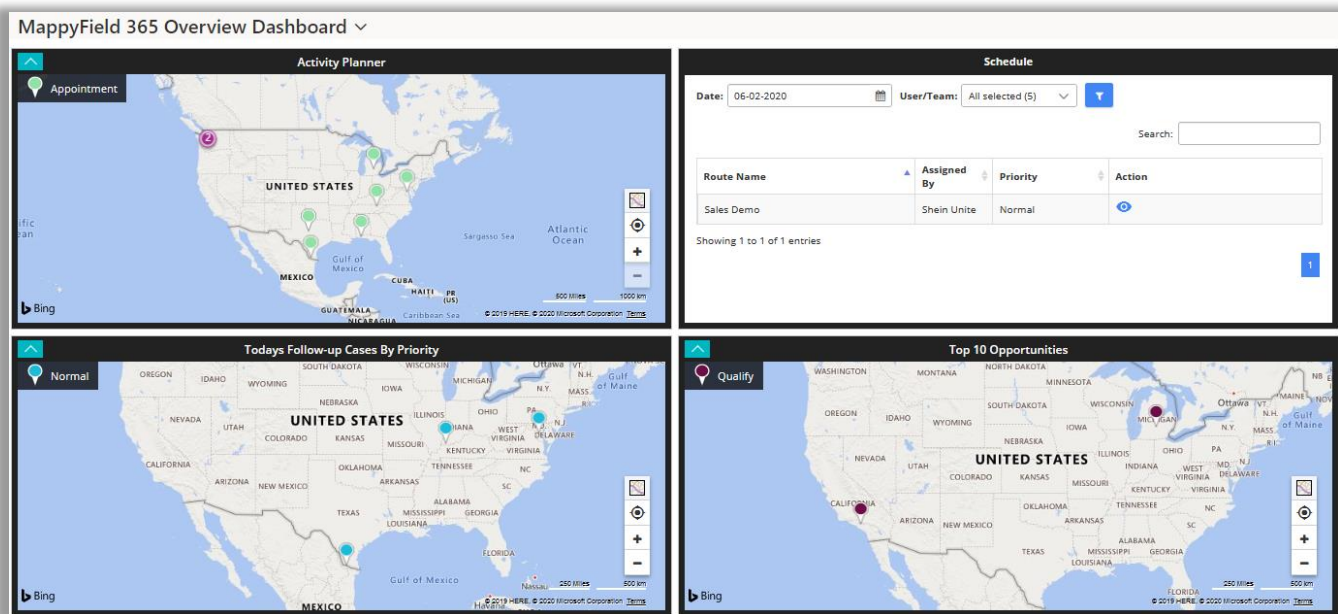
## Analytical Dashboard



- The dashboards are provided in the left navigation panel at the end.

### MappyField 365 Reporting Dashboard

- By clicking on **Dashboard**, you will get the **MappyField 365 Overview Dashboard** with following dashlets:
  - > Activity Planner
  - > Schedule
  - > Today's Follow-up Cases By Priority
  - > Top 10 Opportunities



- Activities Planner:** It displays activities like Task, Appointment, Service Activity of current month in map related to activities related to account/customer.
- Schedule:** It displays all saved auto scheduled routes with date filter. By default, you can see the schedule route as per the current. Users filter is only available for admin users.
- Follow Up Cases by Priority:** It displays all the cases that are to be followed upon for the current day.

- **Top 10 Opportunities:** It plots top 10 opportunities based on revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.

- ☰ MappyField 365 Overview Dashboard
- ☰ MappyField 365 Reporting Dashboard
- ☰ MappyField 365 Sales Activity Dashboard
- ☰ MappyField 365 Sales Performance Dashboard
- ☰ MappyField 365 Service Activity Dashboard

- There are **five** different **dashboards** available in the list for user to select from.
- You can check other **four** Dashboards with different dashlets by clicking on MappyField 365 Overview Dashboard drop down.

### MappyField 365 Reporting Dashboard

- By clicking on **MappyField 365 Reporting Dashboard**, you will get the Dashboard with following dashlets:

> Activity Summary      > My Routes or All Routes

MappyField 365 Reporting Dashboard ▾

#### Activity Summary

**From:** 09-01-2020 **To:** 09-01-2020 **Activity Status:** All selected (4) **User/Team:** Danny Smith 🔍 🔄

Search:

	Activity Type	Activity Count	Activity Duration
+	Phone Call	1	0 Min
+	Task	2	0 Min

Showing 1 to 2 of 2 entries

#### My Routes

**Select Route:** My Routes ▾ **Date:** 09-01-2020 **Status:** All selected (3) 🔍 🔄

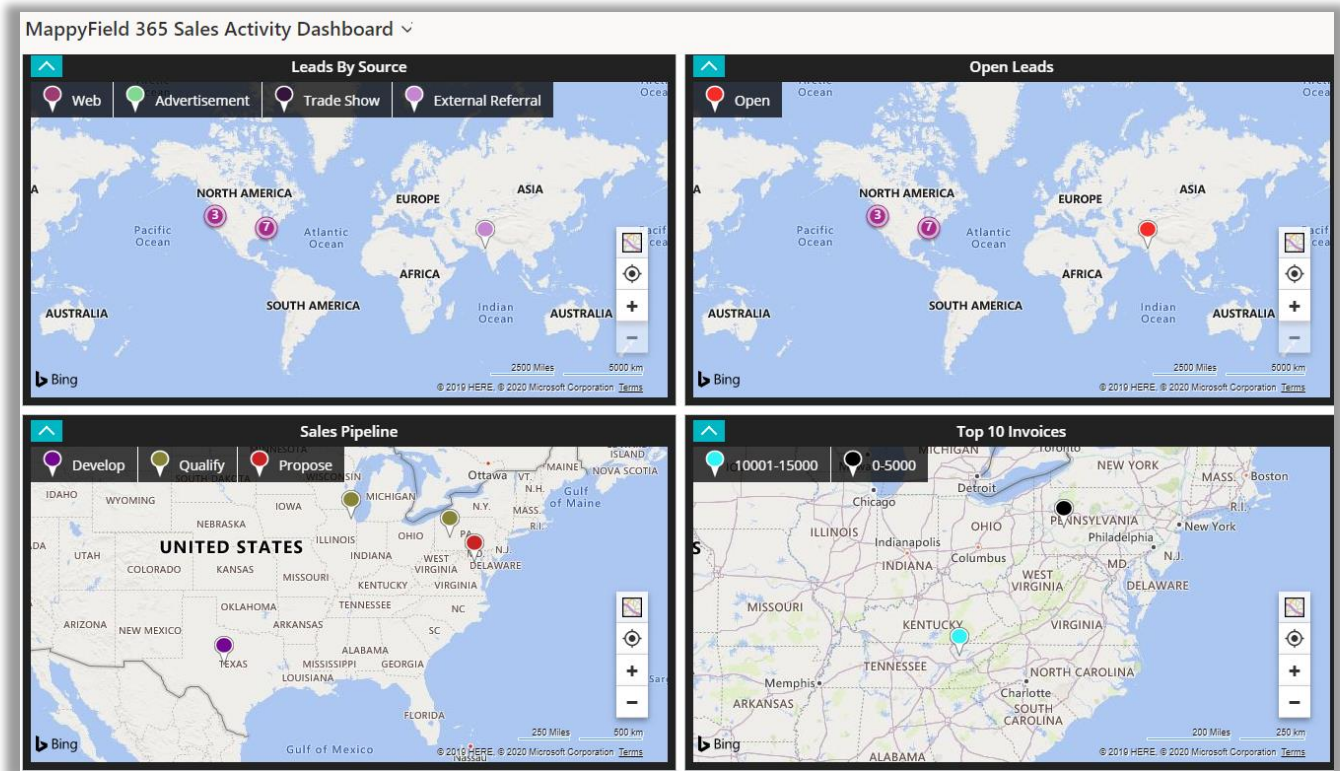
Search:

Route Name	Assigned By	Priority	Travel Distance	Status	Action
Angles Industry customers Route	Danny Smith	High	5.88 Km	Open ▾	👁️ ⚙️
Lead Customer	Danny Smith	Normal	5.88 Km	Open ▾	👁️ ⚙️
Route for Alan Steriner for Meeting	Danny Smith	Low	5.88 Km	Open ▾	👁️ ⚙️

- **Activities Summary:** It displays summary of all the activities like Task, Phone calls Appointment, Service Activity of current day in list view. You can search the record as per inserting Dates. You can check the user wise Summary. Only a user who has Admin rights will get the Filter option.
- **My Routes:** It shows list of all routes for the particular day. For normal user, it shows routes assigned to them or created by them while admin user can view routes of all users. You can check your Route or All Routes by selecting from the drop down of **Select Route**. You can update the Status like Completed/Cancelled along with that you can view the Route and reschedule it.

## MappyField 365 Sales Activity Dashboard

- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
  - > Lead By Source
  - > Open Leads
  - > Sales Pipeline
  - > Top 10 Invoices



- Leads by Source:** It will display all open leads based on their source creation. It can be an Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, Web, Word of Mouth and Other.
- Open leads:** It will display all open leads for the current month.
- Sales Pipeline:** It will display all open opportunities based on the revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.
- Top 10 Invoices:** It will display Top 10 Invoices with respect to total amount of the invoice.

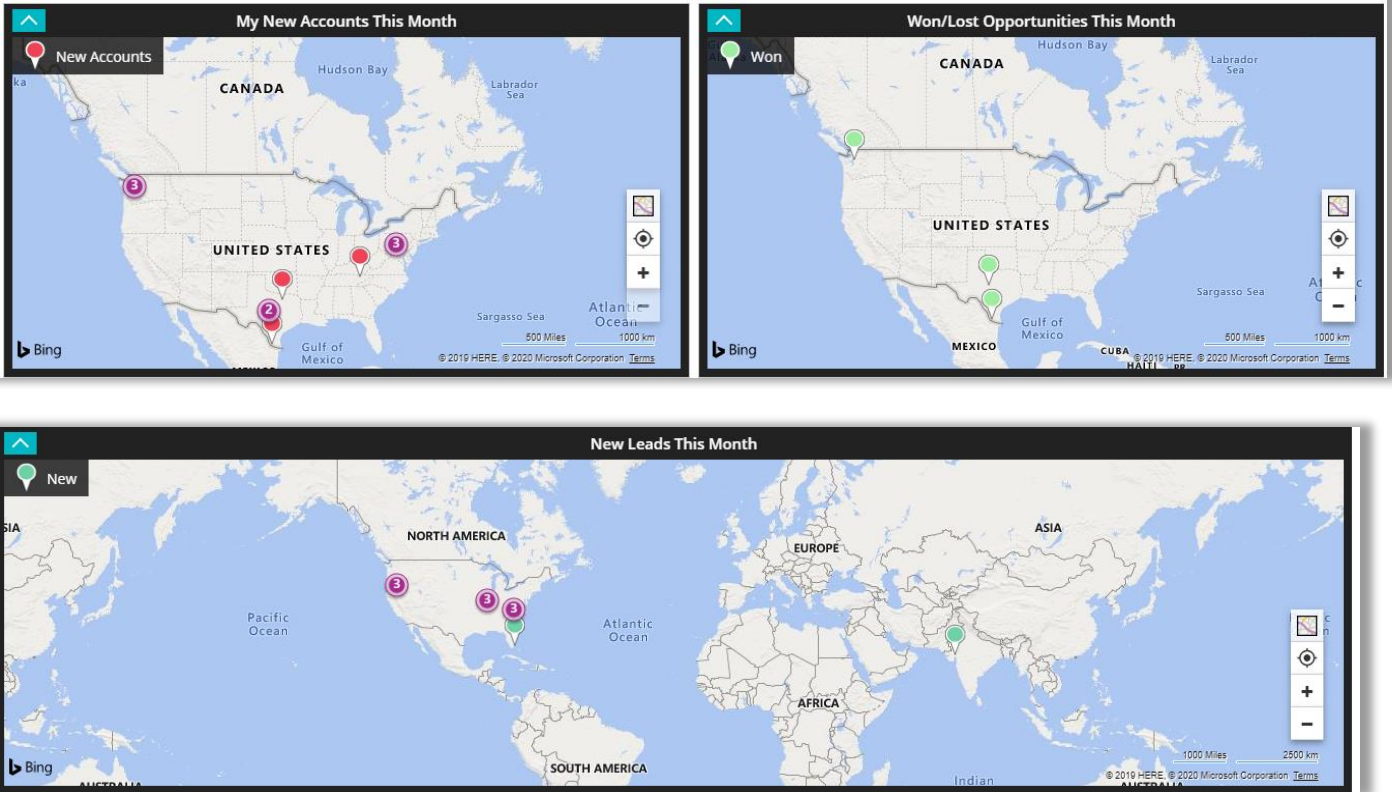
## MappyField 365 Sales Performance Dashboard

- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
  - > My New Accounts This Month

> Won/Lost Opportunities This Month

> New Leads This Month

### MappyField 365 Sales Performance Dashboard ▾

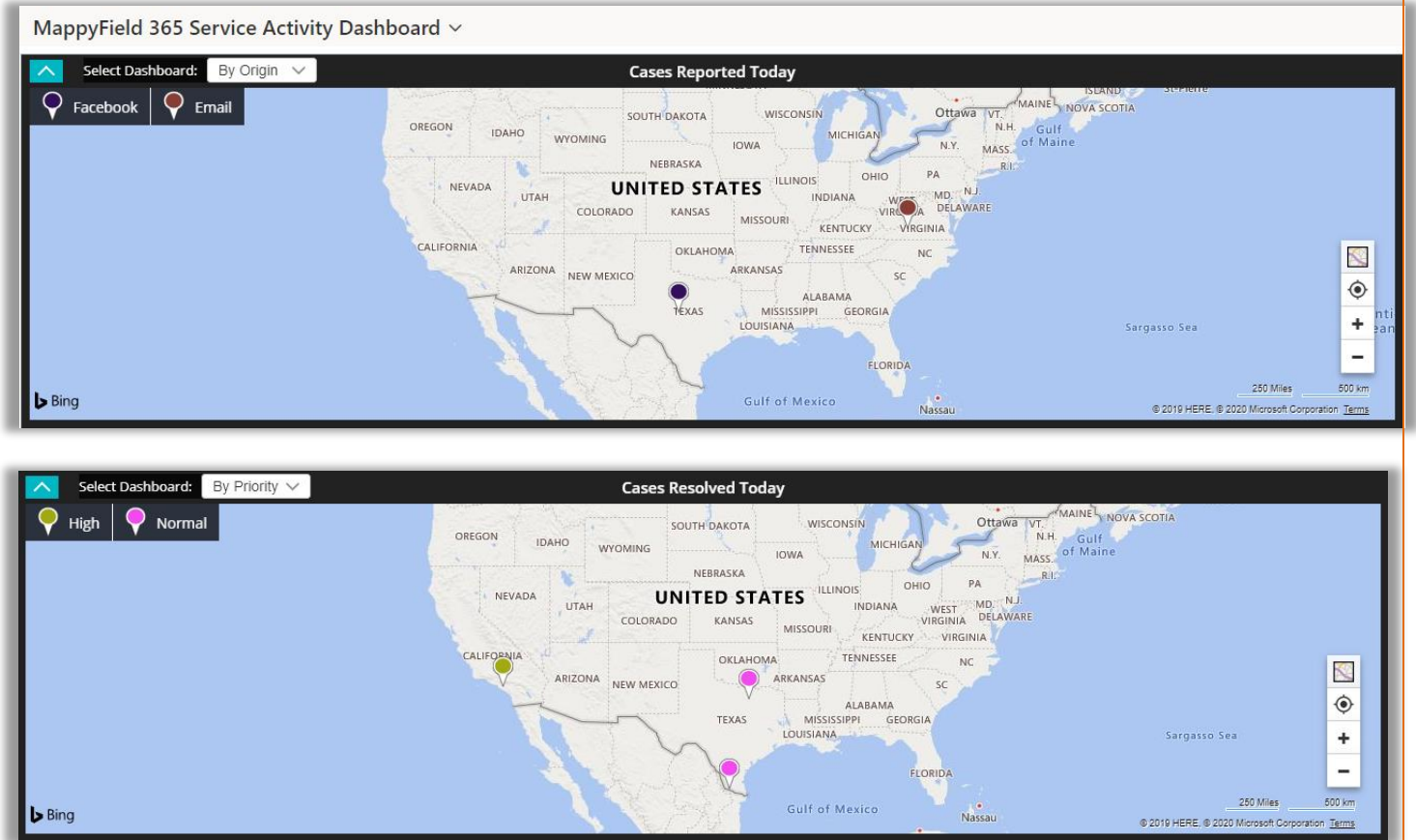


- **My New Accounts This Month:** It will display all open leads created this month.
- **Won/Lost Opportunities This Month:** It will display all Won/Lost opportunities this month.
- **New Leads This Month:** It will display new accounts created for the month.

## MappyField 365 Service Activity Dashboard

- By clicking on **MappyField 365 Service Activity Dashboard**, you will get the Dashboard of Service Activities with following dashlets:
  - > Cases Reported Today
  - > Cases Resolved Today



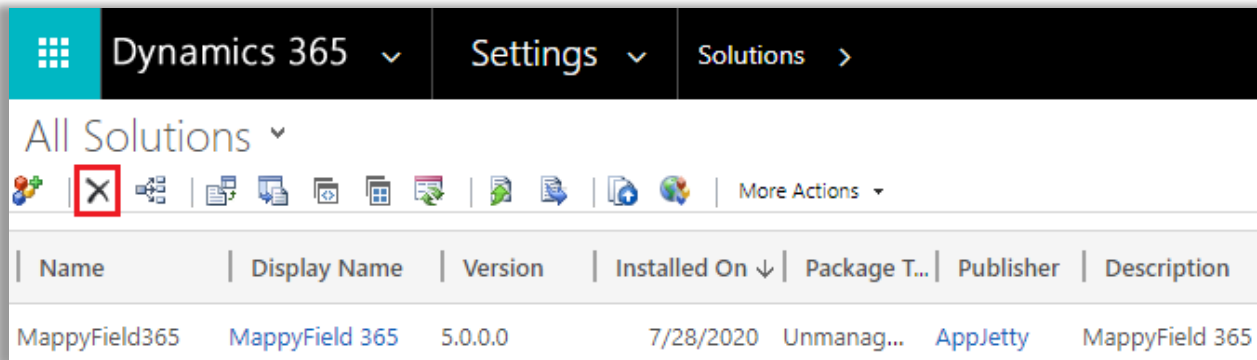


- **Cases Reported Today:** This dashlet would show all the cases reported on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.
- **Cases Resolved Today:** This dashlet would show all the cases resolved on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.

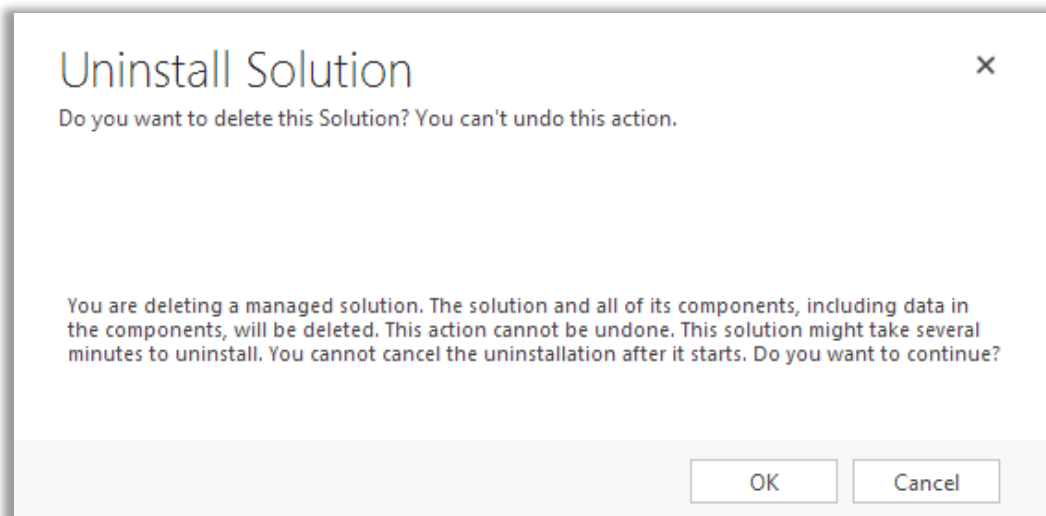
Note: Dashboard will show data only if respective entity is mapped and has records. In case of customer related entities, it is mandatory to map accounts or contacts entity to view records in map. User can redirect to records directly from the dashboard.

## Uninstallation Steps

- To uninstall the Solution, navigate to **Settings - > Solutions**.
- Check on the Plugin Name and click on **'Delete.'**



- Click on **'OK'** to Delete and uninstall the solution from CRM.



## Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamics365-mappyfield-365.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@appjetty.com](mailto:support@appjetty.com) or you can login to your account @ [www.appjetty.com](http://www.appjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM MappyField 365**, please write to [sales@appjetty.com](mailto:sales@appjetty.com)