

Dynamica Google Maps Integration Solution E2E Scenario

Primary Persona:	CRM User
Configuration Settings	Client: Web Client (Browsers: Chrome, Firefox, Edge, IE, Opera); Google Maps API; CRM: 2013 – 365;
Problem / Opportunity Statement:	<p>Google Maps is most popular mapping service. It is useful to have clear understanding where are your leads, contacts, accounts or opportunities are located, and the best way to visualize it – see the records location on the Google Map. However, there is no Dynamics 365 solution that allows to integrate with google maps and show records coordinates on the map.</p> <p>Dynamica Google Maps is easy 1-click google maps integration solution that allows to show records coordinates on the Google Map in an easy and simple way. Google maps are available on Dashboards, allows to change views and open records right from the Google Map by just clicking on record’s name. Maps are also available on the record’s form. Google Map can be also embedded either on any Dashboard or on any Form to show record’s coordinates right on the Form when the record is opened.</p>
Pain Points:	<p>Hard to visualize locations of the records knowing only their addresses without seeing it on map. Hard to understand where, how far and how many leads, contacts, accounts or opportunities do you have;</p> <p>No Dynamics 365 solution that allows to integrate with Google Maps to show records coordinates on the Google Map.</p>
User Goals:	Be able to see records coordinates on Google Maps without leaving Dynamics 365.
Business Goals:	<p>Show records coordinates on the google map to better Dynamics 365 data visualization and faster analyzing. Understand where and how far the leads, contacts, accounts or opportunities are located.</p> <p>Clear understanding on how many the leads, contacts, accounts or opportunities are in different locations</p>
Triggers:	<p>Google Map on record’s form: Open Contact, Account, Lead or Opportunity that has address specified, switch to form <Entity Type> with Google Maps and scroll down to find section with Google Map.</p> <p>Google Map on Dashboard: Go to Dashboards -> Dynamica Google Maps Dashboard. Select Entity type and view from drop-down menus.</p>

	<p>The map can be also embedded on any form with a form editor;</p> <p>The map can be embedded on any Dashboard as a chart;</p>
<p>Narrative Description (e.g., plans, evaluation, actions, objects, context, events):</p>	<p>The Trial version of the solution is limited to work with Contact entity only.</p> <p>Free Version of the solution (up to 10 users) has a notification that this is a trial or free version of the solution and Dynamica Labs logo in the upper-right corner of the map.</p> <p>Full version works with 4 entities: Lead, Contact, Account and Opportunity.</p> <p>User must generate Google Maps API key and copy it into solution's configuration.</p>
<p>Detailed Steps</p>	<ol style="list-style-type: none"> 1. <i>Install the solution;</i> 2. <i>Enable Geolocation API and Maps JavaScript API;</i> 3. <i>Copy Google Maps API key into solution's configuration page;</i> 4. <i>Open Contact Record with address specified;</i> 5. <i>Switch form to Contact with Google Maps;</i> 6. <i>Scroll down to Google Map section;</i> 7. <i>Go to Dashboards and select Dynamica Google Maps Dashboard;</i> 8. <i>Select Contact Entity and View;</i> 9. <i>In order to be able to work with Account, Lead or Opportunity entities as well – go to Settings -> Solutions -> Dynamica Licensing and from the licensing page send an email to support@dynamicalabs.com with number of users specified. After receiving a licensing key – copy it into Product License Key field of the Dynamica Licensing solution configuration page. <i>*Note: that you can get licenses for up to 10 users for free;</i></i> 10. <i>Google Map can be embedded on any form or Dashboard as a Web Resource;</i>
<p>Success Metrics:</p>	<ol style="list-style-type: none"> 1. Dashboard: coordinates of the records from the selected view are shown on the map (records must have addresses); 2. Record's Form: record's coordinates are shown on the embedded Google Map;