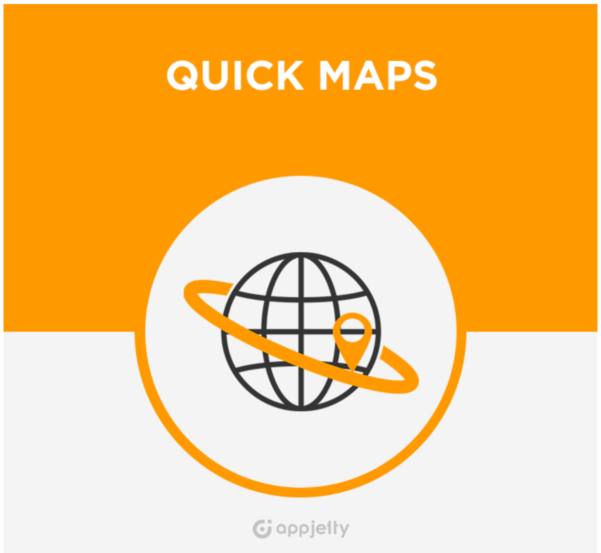
USER MANUAL



Quick Maps

Version: 4.0

Compatibility:

Dynamics 365 (v9.0) and above

TABLE OF CONTENTS

Introduction

Quick maps 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 Quick Maps

- Ease of access
- Plot any entity record on the map
- Concentric proximity Search across entities
- Build marketing list
- Qualify/Disqualify records
- Point of interest search
- Color code pushpins and heatmap
- Routing with multiple waypoints
- Ability to save & share driving directions
- 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:

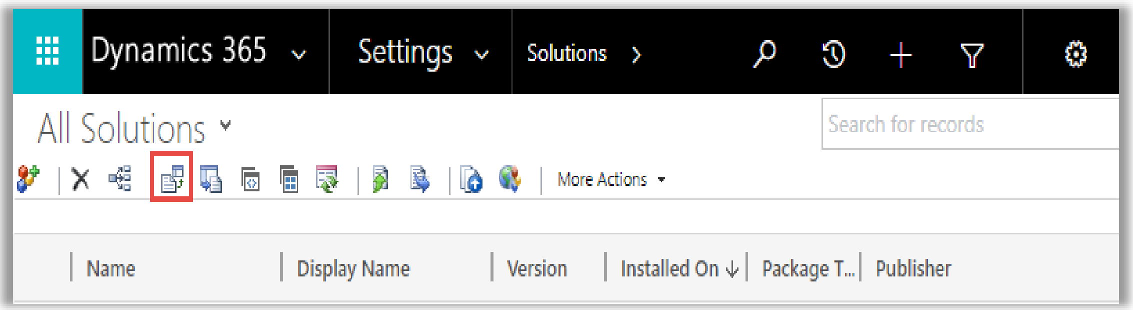
- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.
- You will have to generate Bing Map API key.

Installation & Configuration

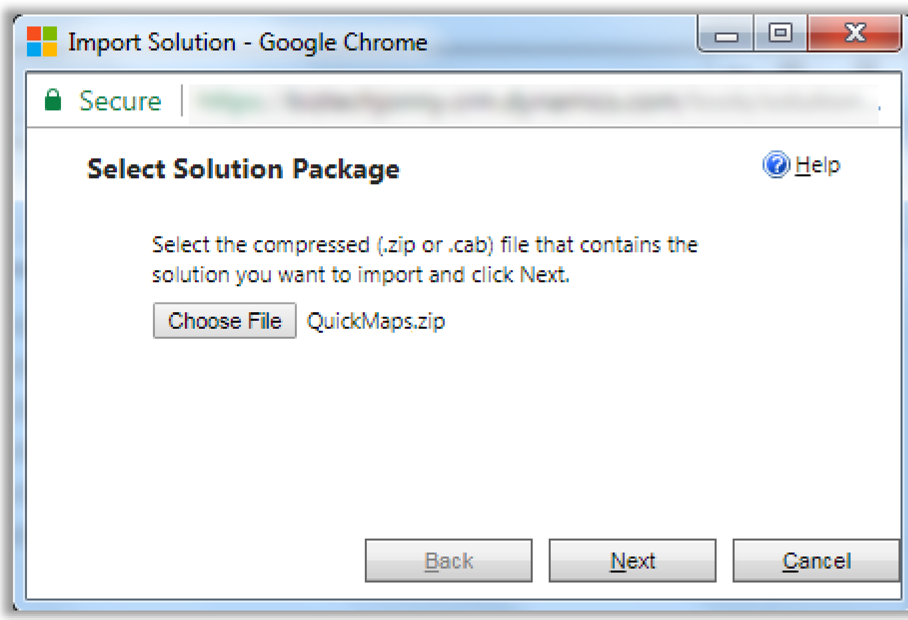
Installation Steps

To install 'Quick Maps' plugin, the following steps are to be followed:

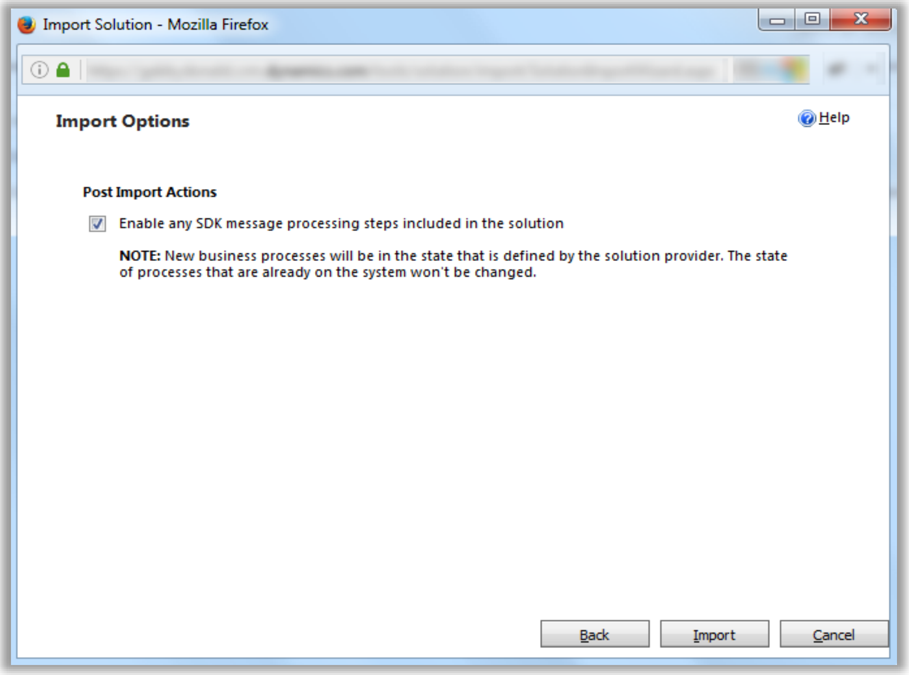
- On purchasing the plugin, you will get a zip file named "QuickMaps.zip".
- Login into your CRM Account and click **on Settings -> Solutions.**



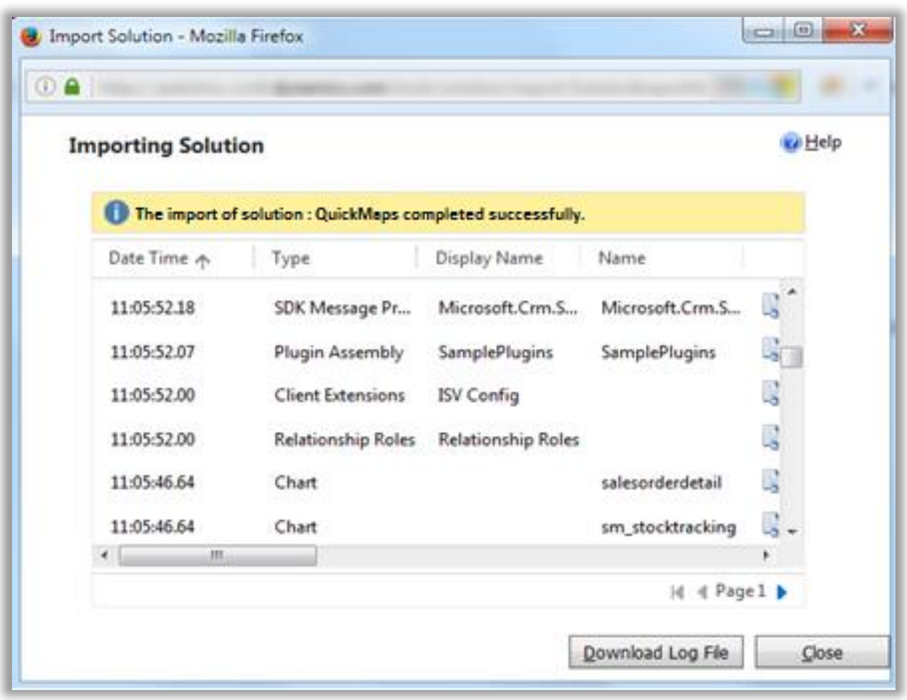
- Click on **'Import'** to upload and install the Solution.
- Click on **'Choose File'** button and choose the Package Zip File for **Quick Maps** from the Import Solution Window.



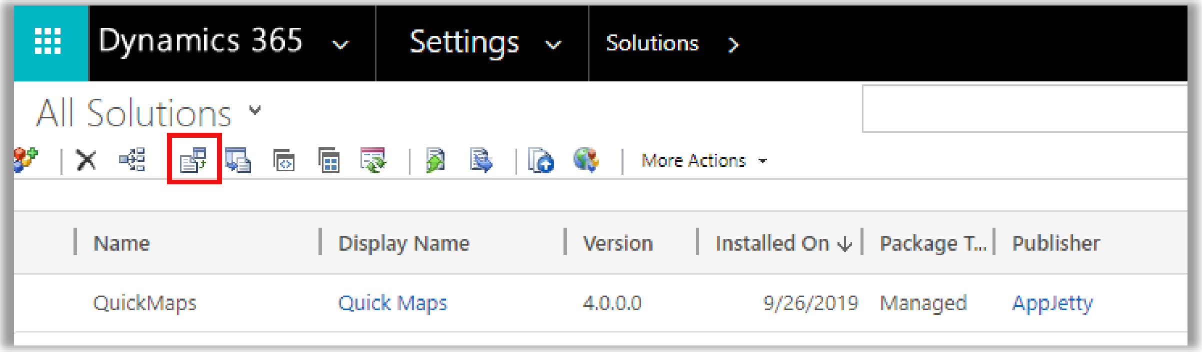
- Click on **'Next'** for further processing.



- 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.

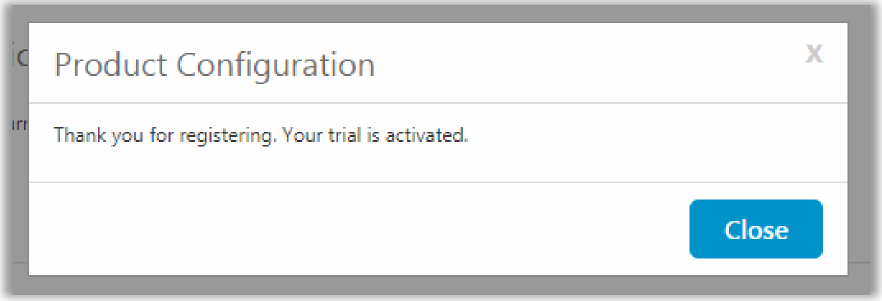


- Once you import the solution, it will be displayed in the solutions grid view.

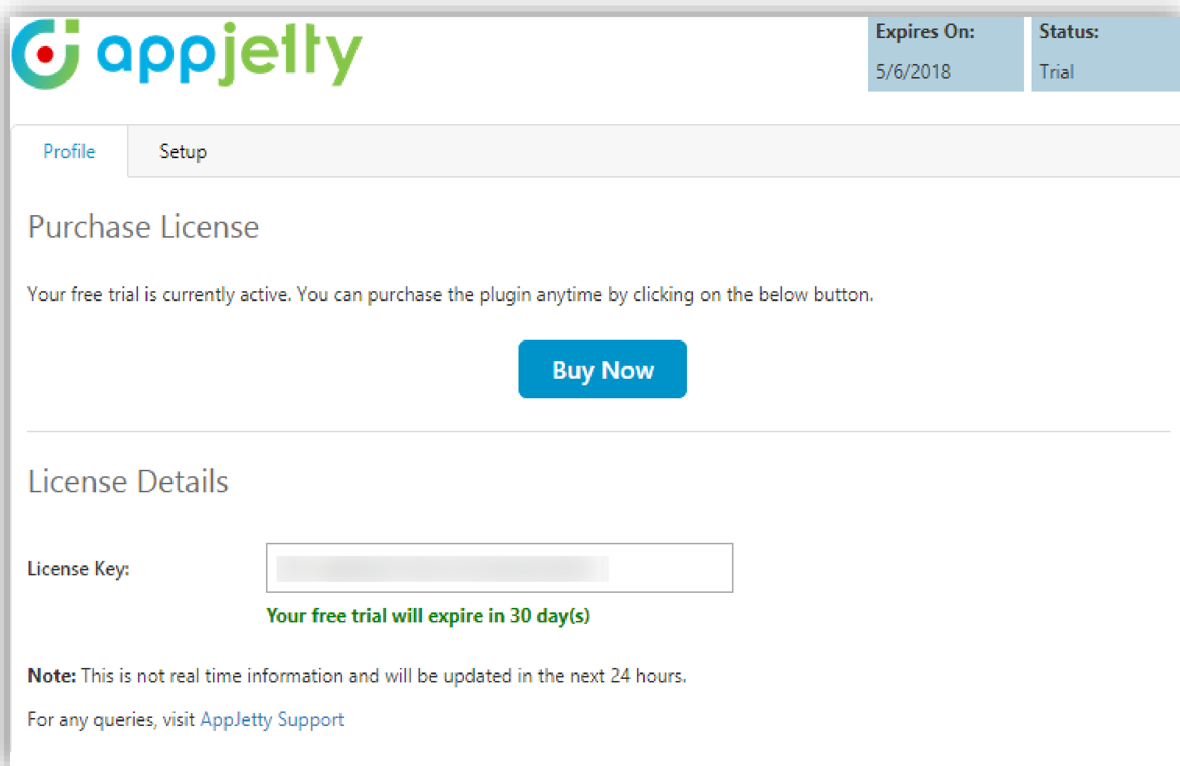
Configuration Steps

- Double click on **'Quick Maps'** 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.

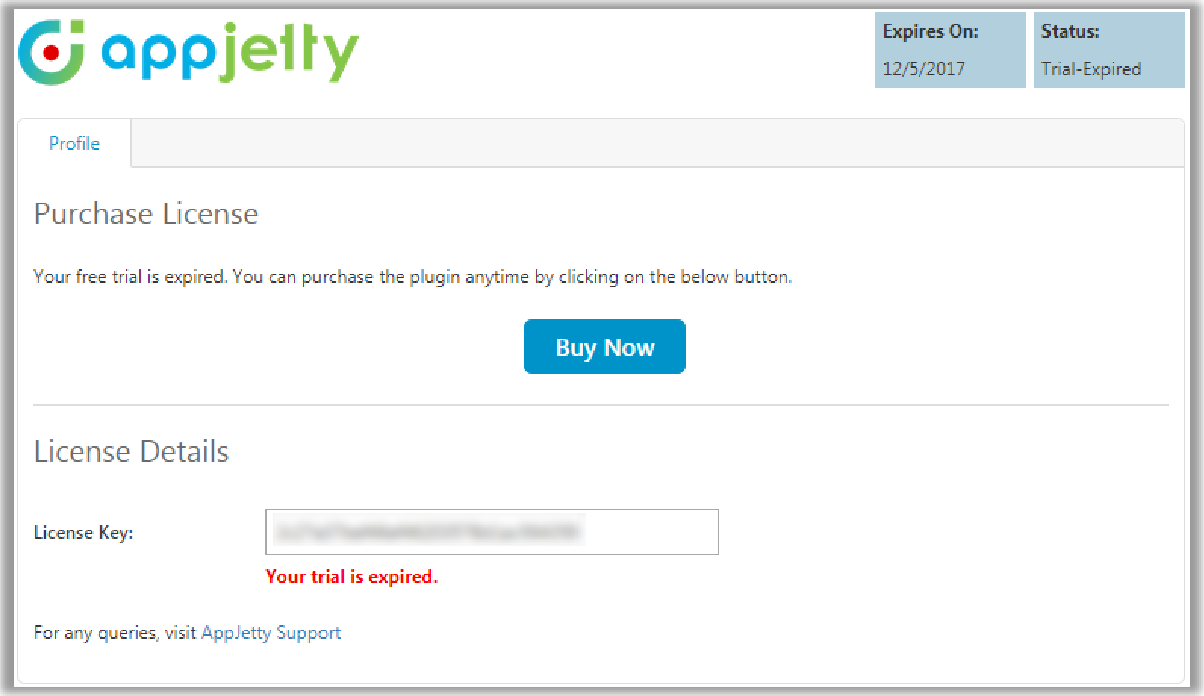
- You can activate your one-month free trial.
- To get a one-month free trial license key, fill out the details and click on **'Activate'** button.



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

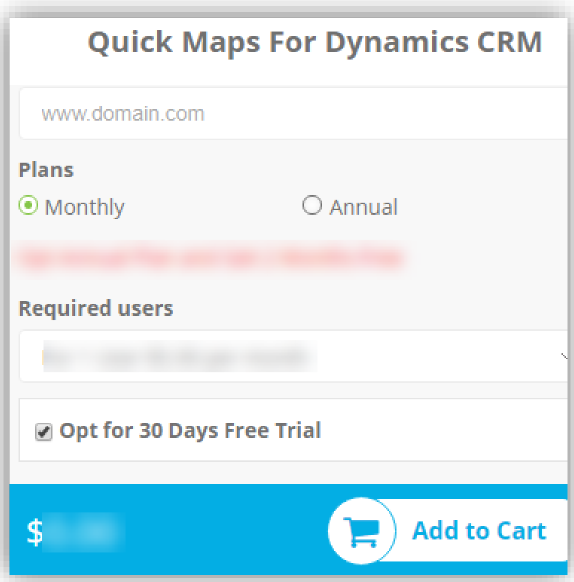


- You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

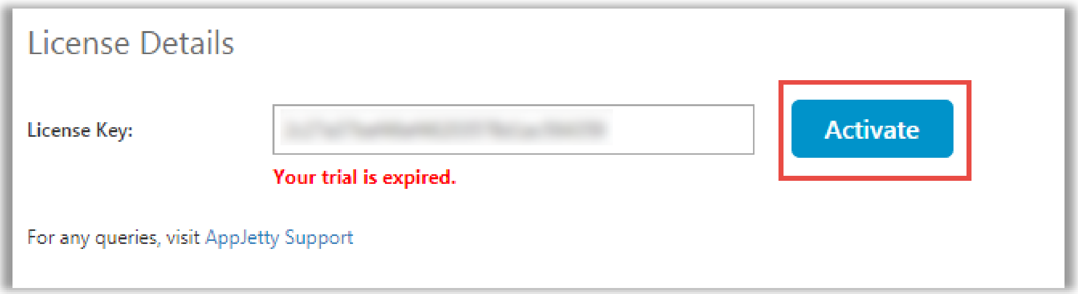


- On expiration of Trial, a message will appear that the Trial is expired. Now to purchase the license click on **'Buy Now'** button.

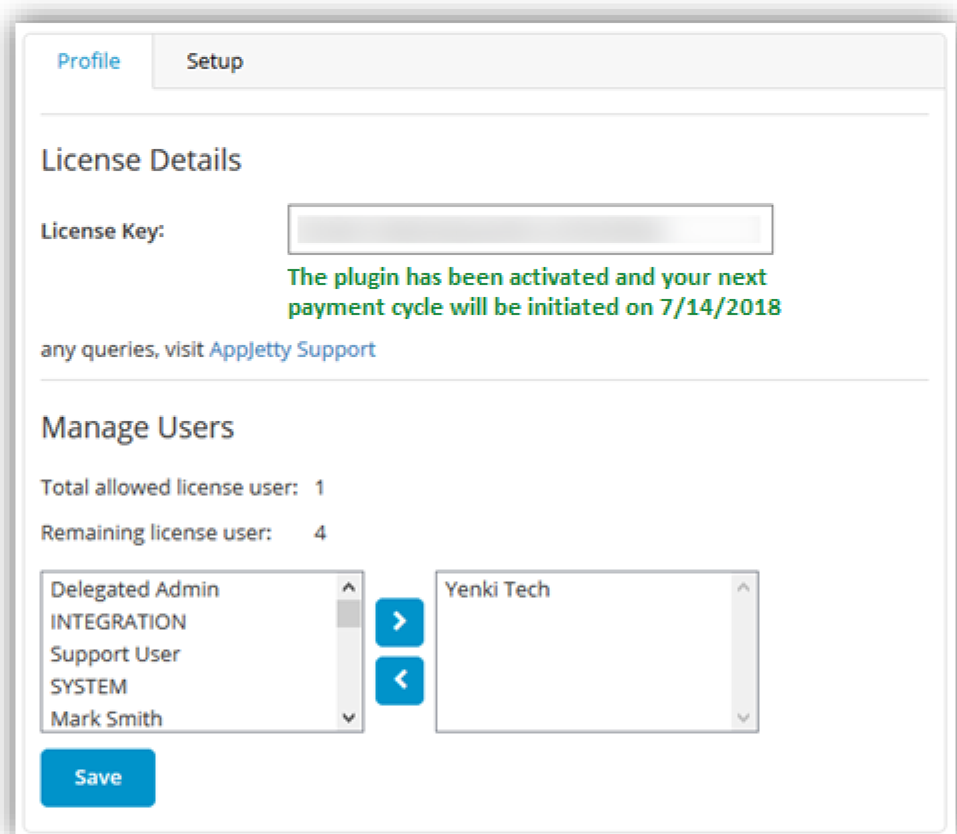
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



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

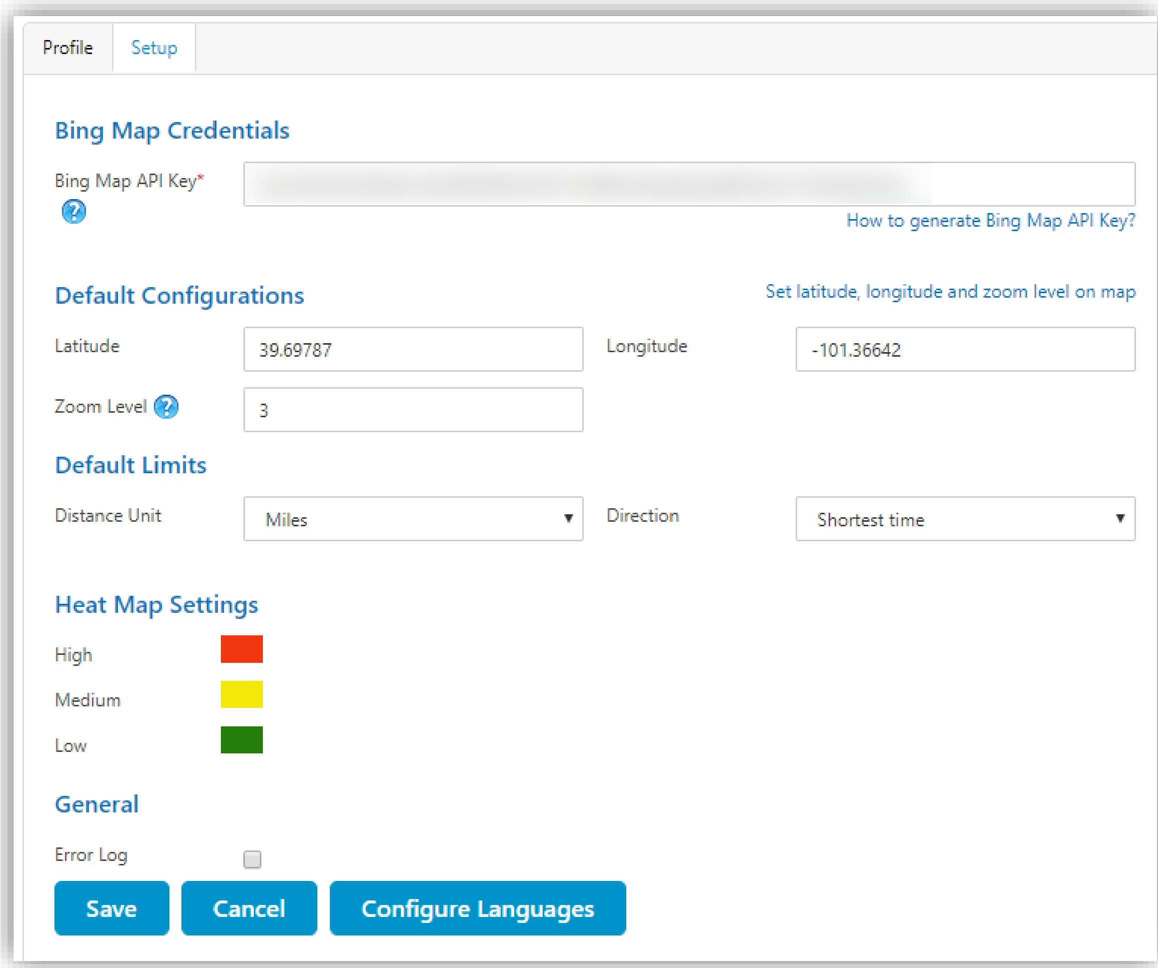


- Enter the New License key received in mail. This will enable the **'Activate'** button.
- Click on **'Activate'** button to activate your license.



- Once you activate the license, **'Setup'** tab will be displayed besides the **'Profile'** tab.
- Default settings under set up tab can be managed only if a user has **System Administrator Role**, **AppJetty Quick Maps Admin** or **AppJetty Quick Maps User role**. Or else it would show error message stating "You don't have administrative rights. Please contact administrator."

- To manage the default configuration settings, click on **'Setup'** tab and enter default configurations.



- **Bing Map API Key**: Enter Bing map API key which you have generated from https://www.bingmapsportal.com/. To assist you further, we have added a link beneath the text box that states **How to generate Bing Map API Key**.

- After that for "**Default Configurations**" set default latitude, longitude and zoom level for map when it is opened for the first time. You can set the same using the map as well by clicking on "**Set latitude, longitude and zoom level on map"** option available on the right hand corner.

- Also, 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.

- You can also enable error log option which would send error logs to the CRM.

Configure Languages:

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

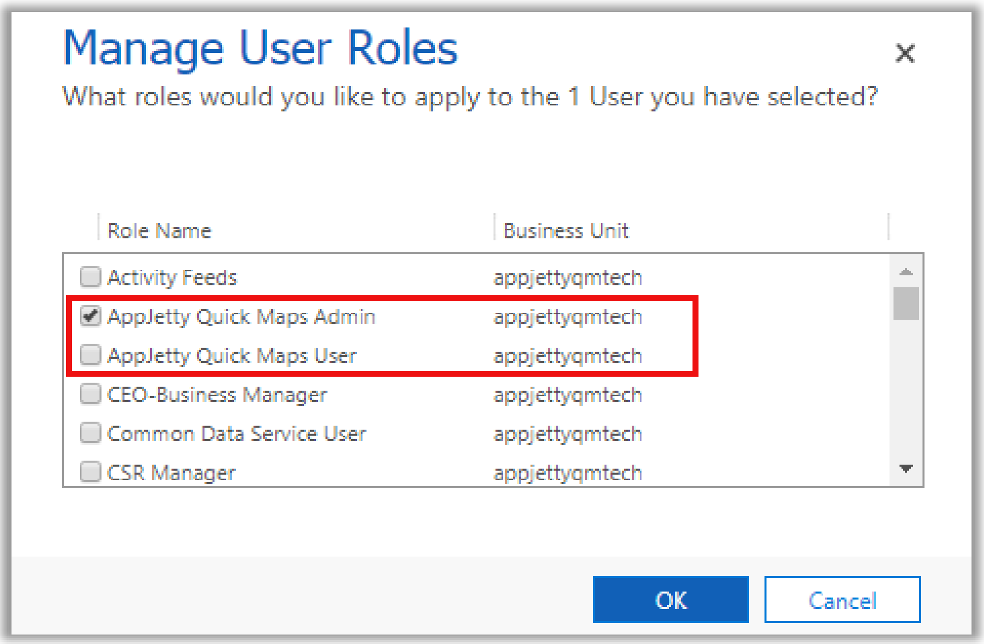
- On configure language page, select the language from dropdown that you wish to configure your messages.

Map	Mapa
Directions	Direcciones
Definitions	Definiciones
Locations	Ubicaciones
Configuration	Configuración
Search	Buscar
Clear	Claro

- 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 calendar.

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 up a pop up to select roles.

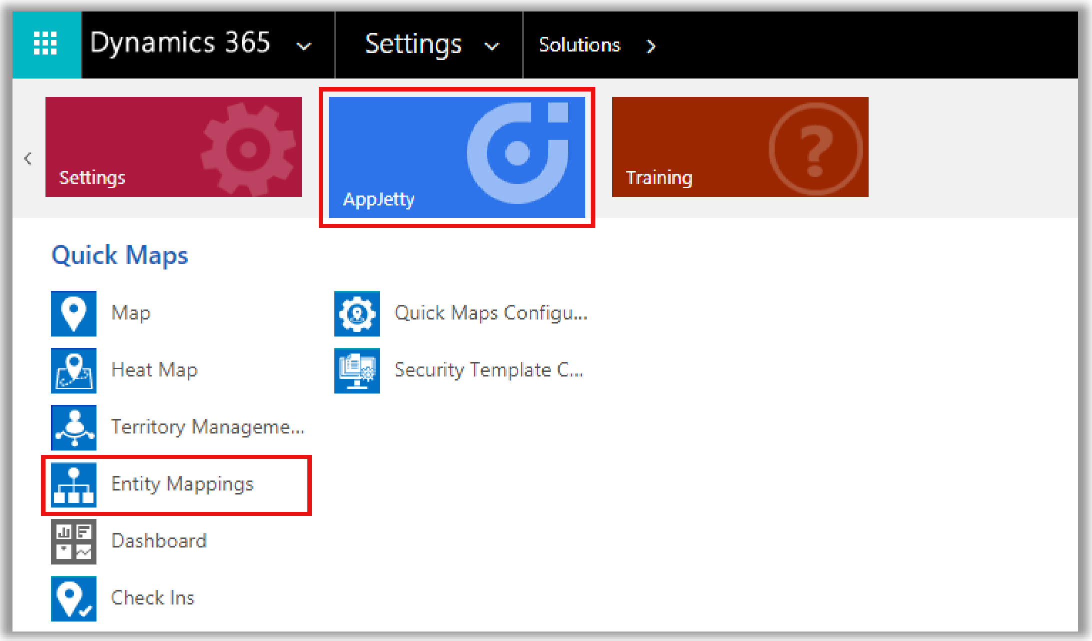


- The available roles for selection are AppJetty Quick Maps Admin or AppJetty Quick Maps User role. User with AppJetty Quick Maps Admin role can perform all the actions similar to System administrator while user with AppJetty Quick Maps User role can do all actions except delete actions.

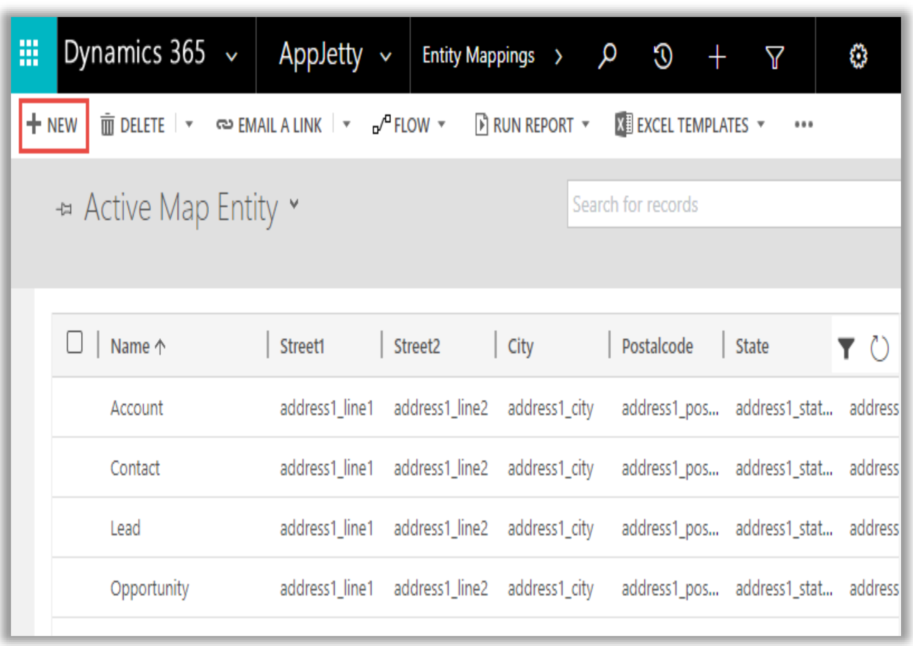
Procedure

Map Entity

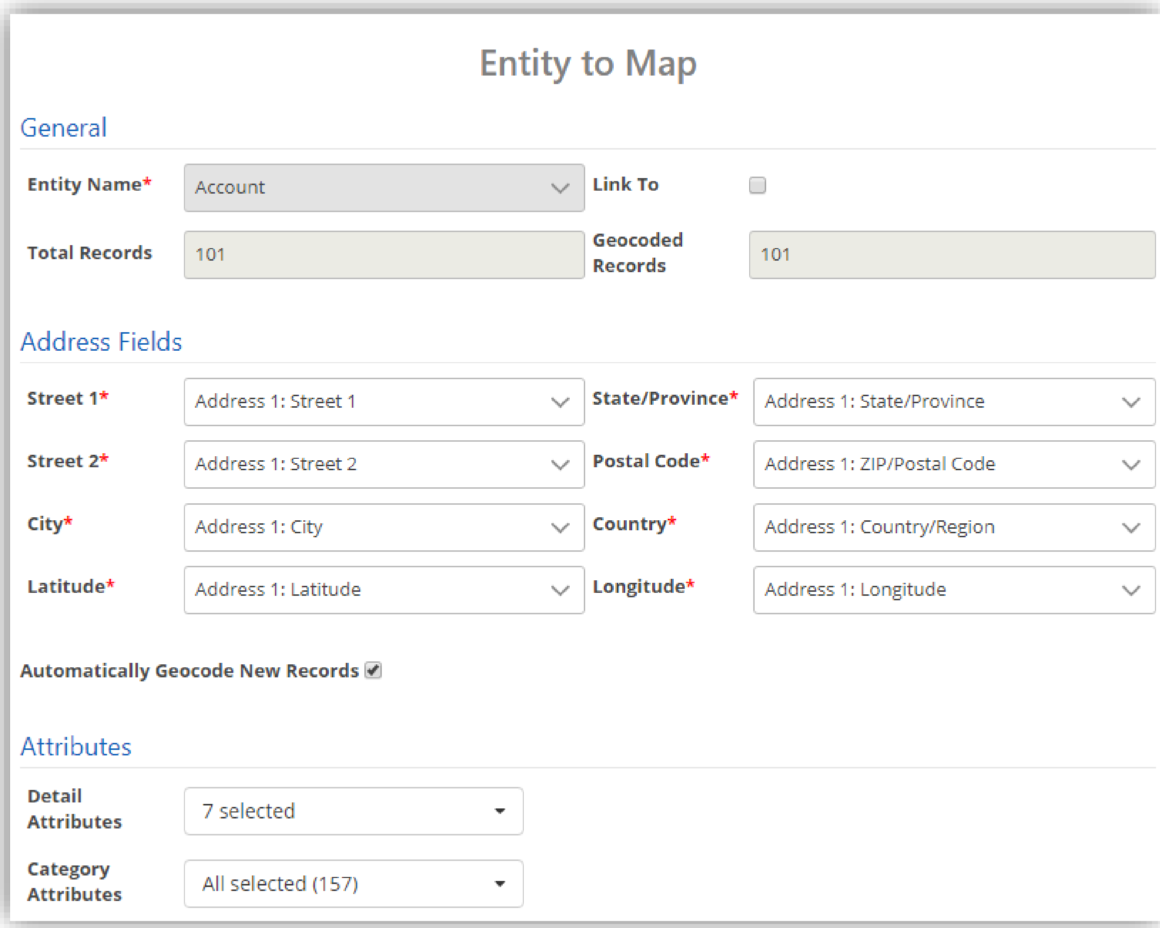
- Navigate to AppJetty tab and select Entity Mappings.



- It will list entities 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.

- 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 records automatically.

- Once you have filled all details, click on "Save" button. Entity will be mapped, and success/failure message will be displayed.

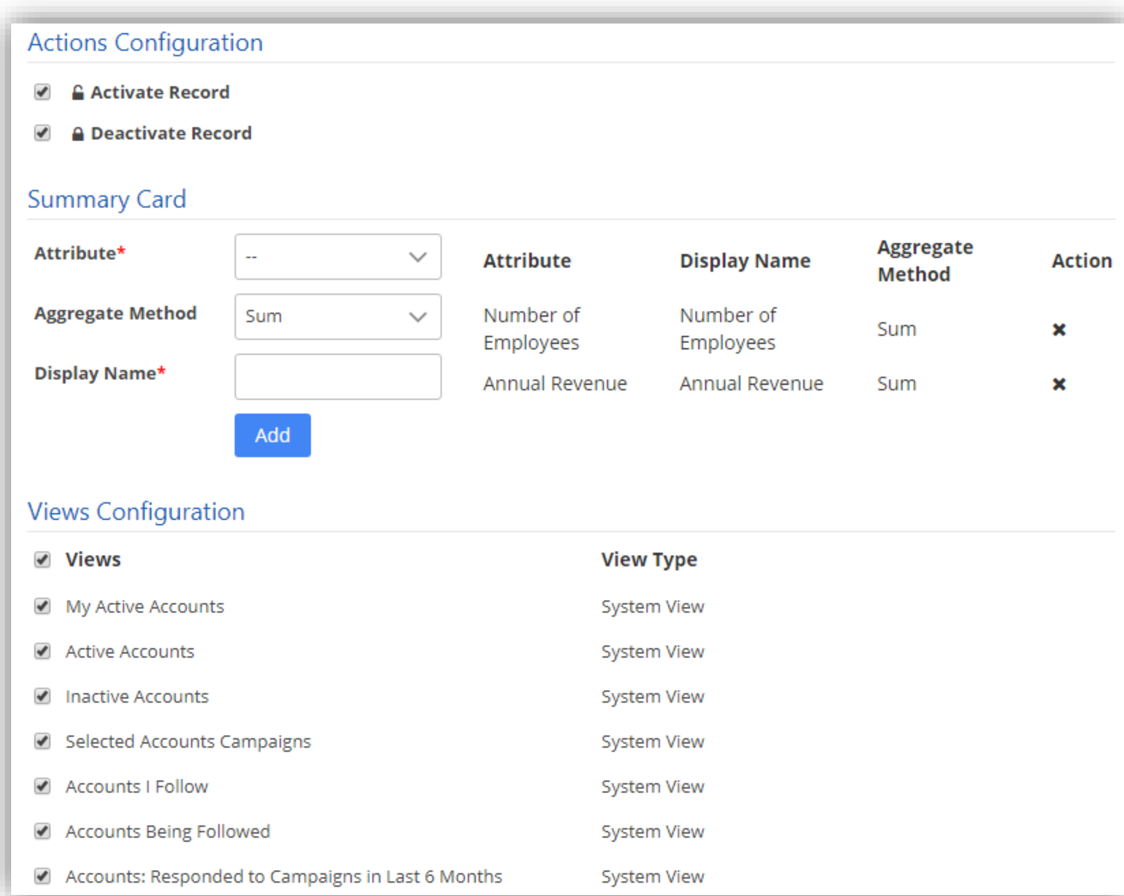
- For mapped entities, further configurations can be managed like Attributes configuration. It includes Detail Attributes and Category Attributes.

- Detail attributes are the one that appear on card upon clicking on pushpin pointer. At max 10 attributes can be selected.

- Category attributes are the one 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.



- **Summary Card Configuration**

  You can make configurations related to what you want to display on summary card.

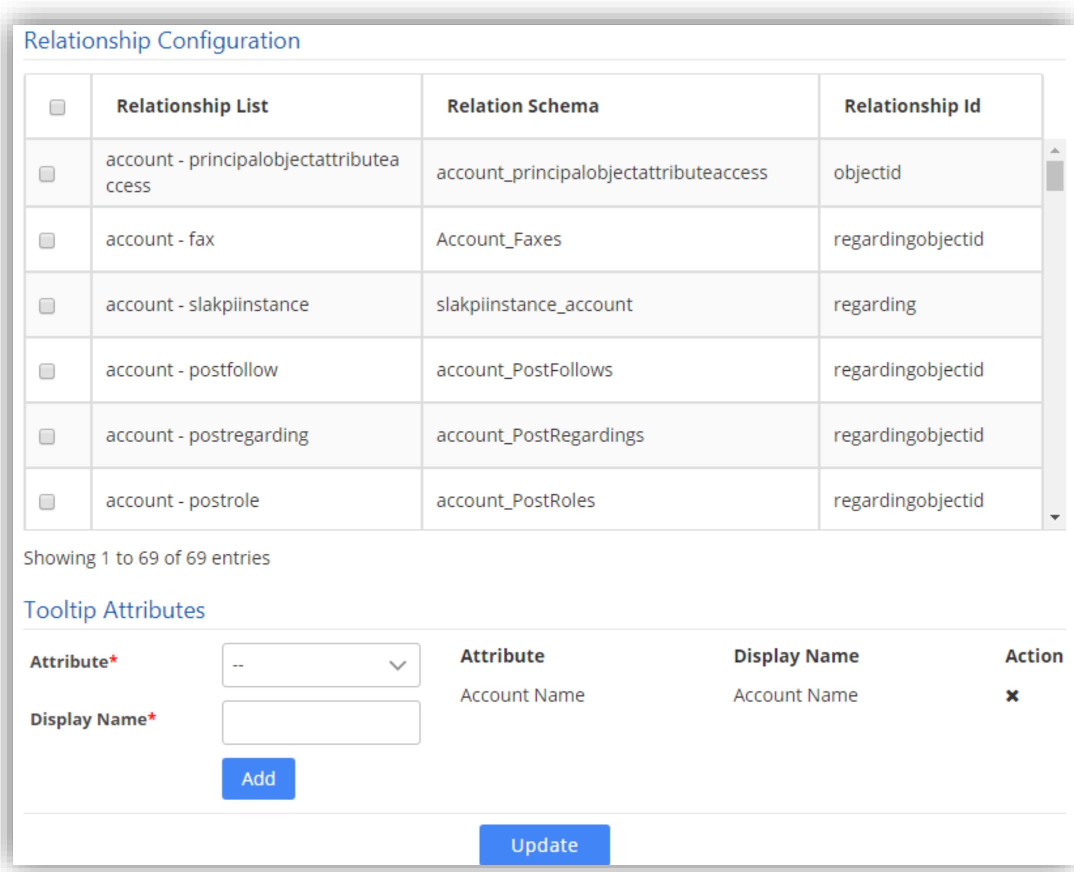
  For summary card of an entity, you can choose the attributes that you want from the dropdown list. Also, under aggregate method, you can define the way you want records to be summarized. It can be either sum or average. Also, you may define display name of the particular attribute. By default, it is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

- **Views Configuration**

  You can select all the view that you want to display on the map for selection along with particular entity.

- **Relationship Configuration**

  The selected relationship id and name gets plotted as part of related records associated with a record.



- **Tooltip Attributes Configuration**

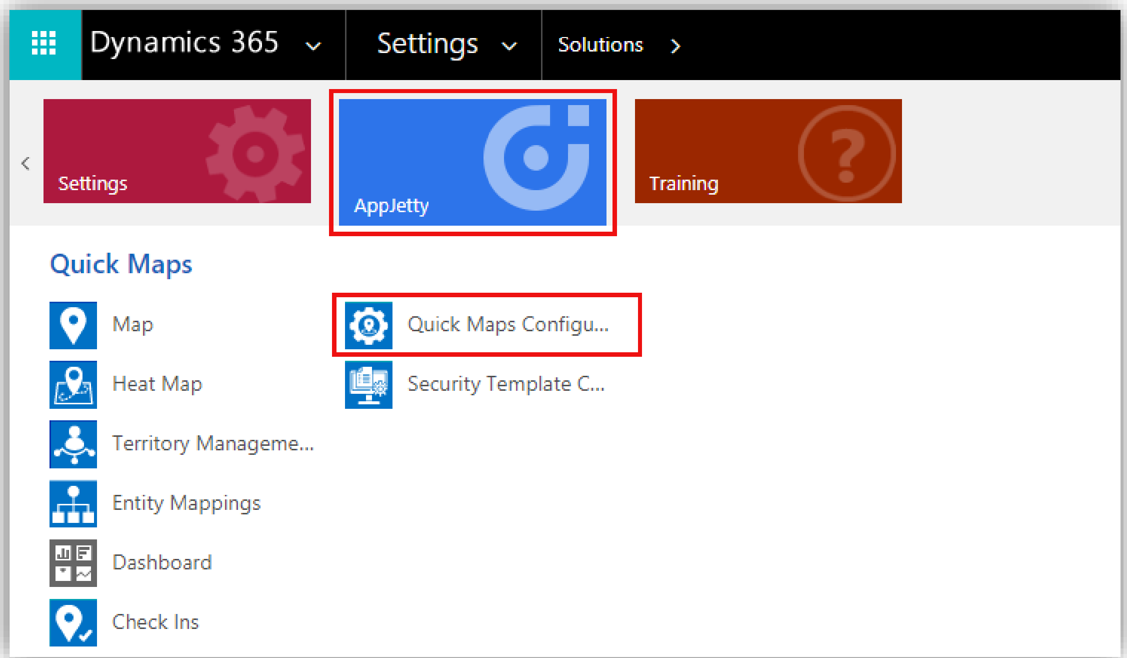
  You can make configurations related to what you want to display on tool tip when anyone hovers on the particular record.

  For that, you can choose the attributes that you want from the dropdown list. You may also define display name of the particular 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.

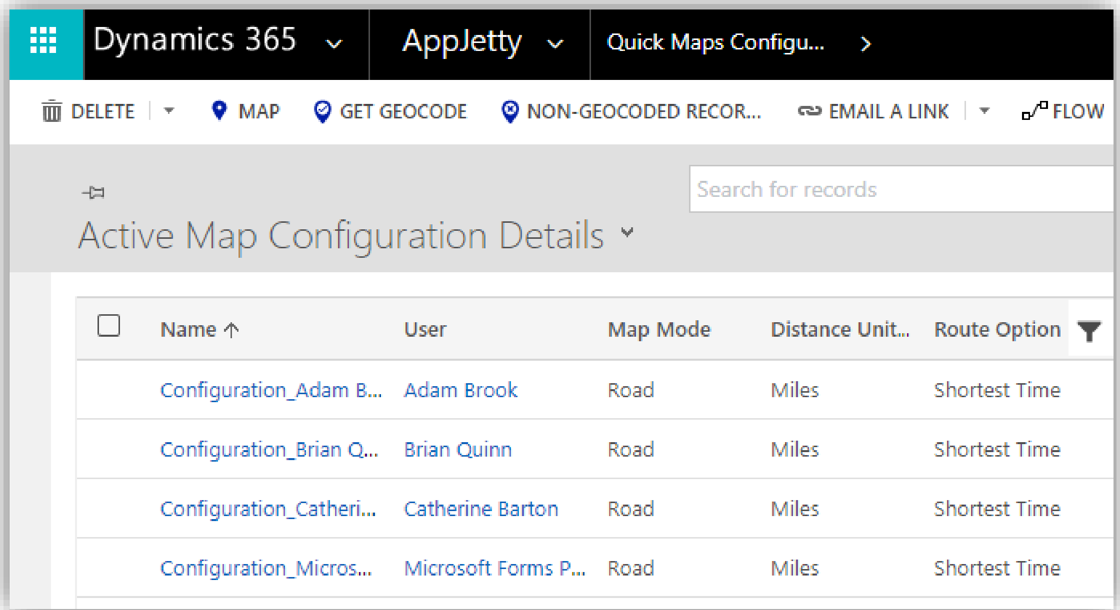
- After making all the configurations, click on Update button to complete the process.

User Wise Map Configuration

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



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



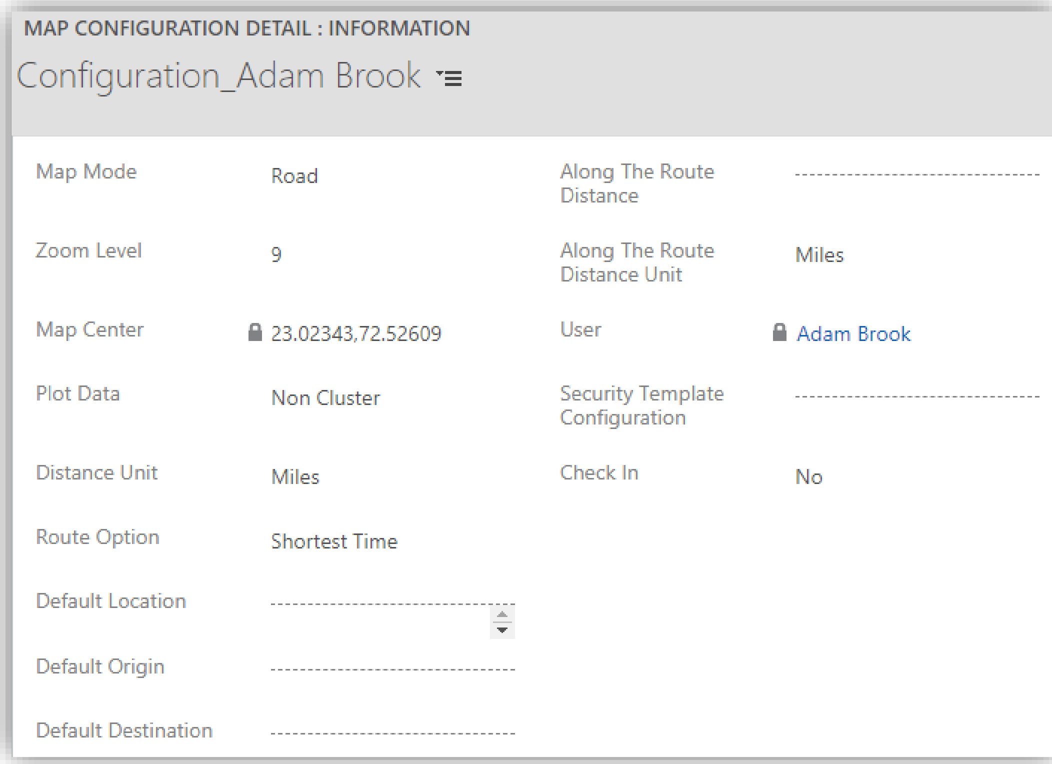
- On navigating to Quick Maps configurations, it would show configurations of all the users to admin user.

- 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.

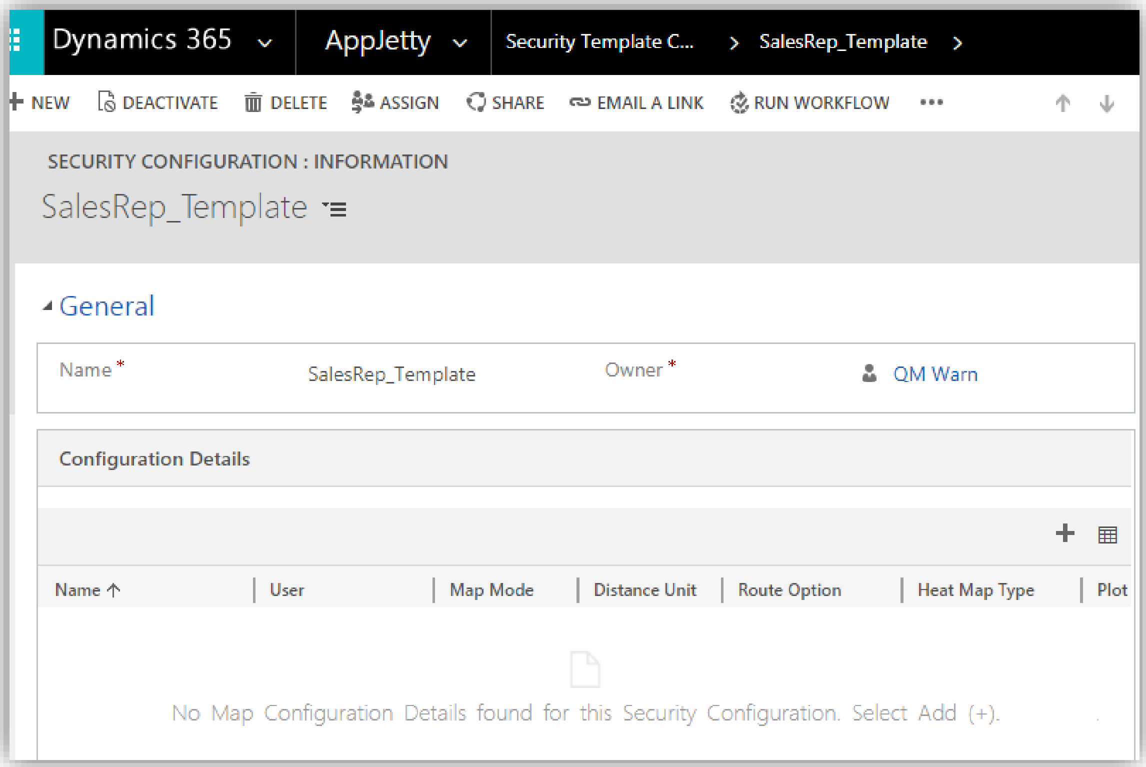
  - Plot Data: Default plotting of data can be defined. Either it can be in cluster or non-cluster format.



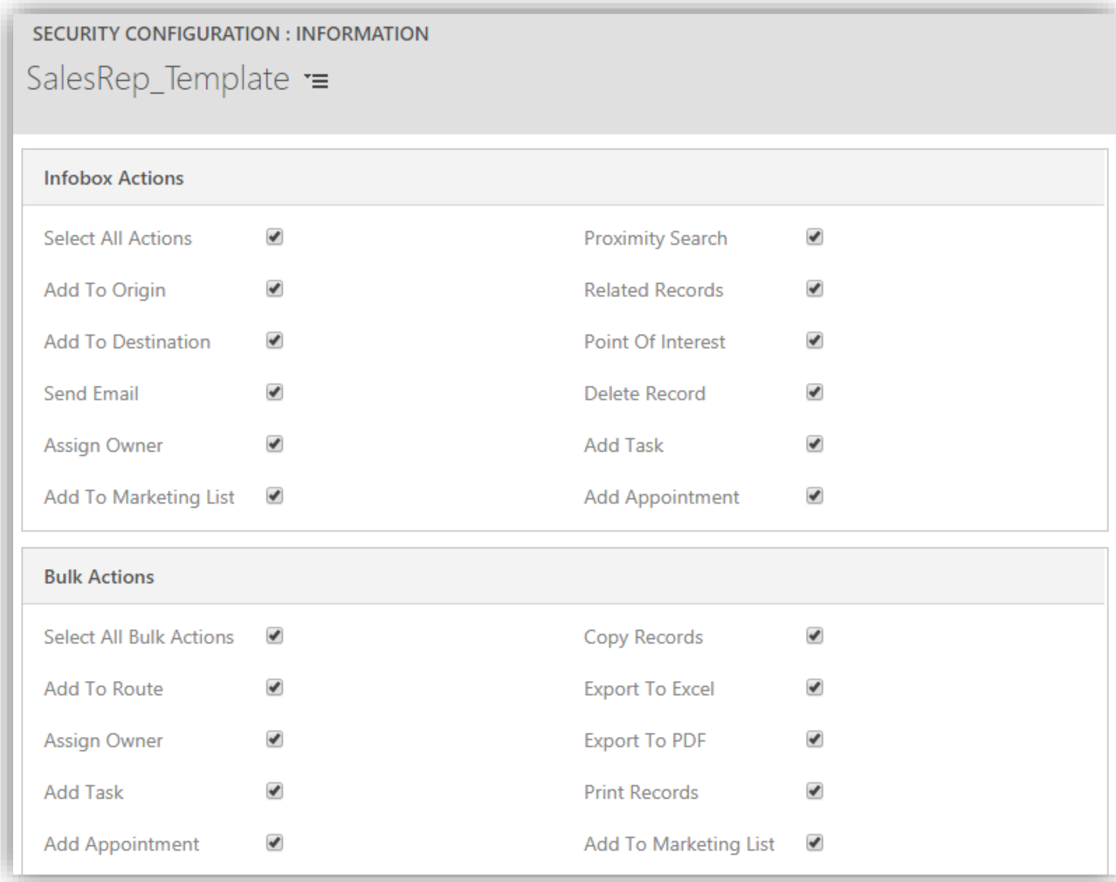
- Distance Unit: Default option for distance measuring. Either miles or kilometers.
- Route Options: You can define best way to determine route from this feature.
- Default Location: The user can define the default location using this option.
- Default Origin: The user can define the default origin using 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: Define default security template for the user if required.
- Check Ins: Enable or disable check in module.
- Check In Radius: Define geo radius that can be allowed to perform any check in.

Security Template Configuration

- Assign selected actions to different user using security templates.
- Only system administrator or user with AppJetty Quick Maps Admin role can create security template for other CRM users with AppJetty Quick Maps User role.



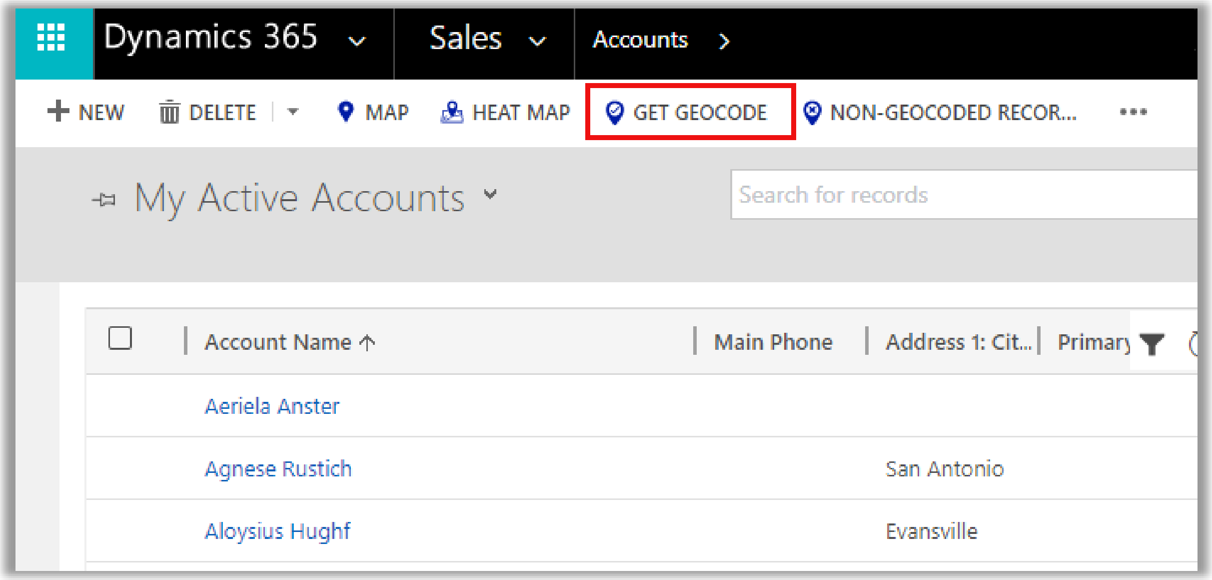
- To create security template, navigate to **AppJetty -> Security Template Configuration**. Click on New button from the action ribbon and enter template name and select all the actions that you want to make available for users with that particular template.



- Click on save button. Upon saving, it would enable Configuration details section from where you can directly assign particular template to a user.

Manually Geocode the Record

- Navigate to the record for which you want to manually set a geocode. For example, if you want to geocode any record of account, go to **Sales -> Accounts** and select a record.



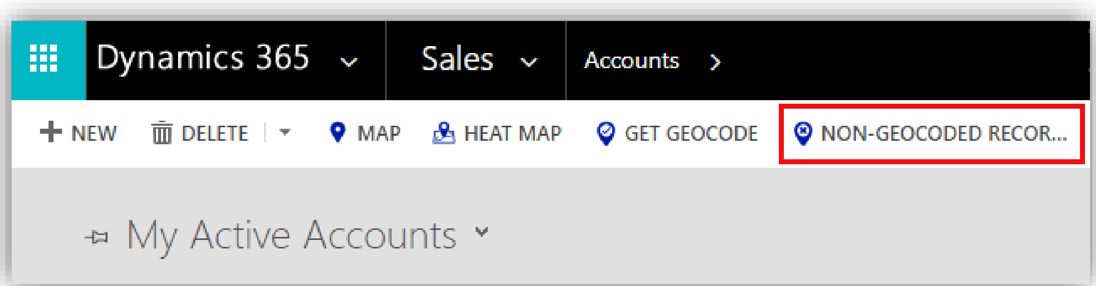
- If you have changed the address, then you need to manually geocode that record by clicking on "**Get Geocode**" button from ribbon.

- You can also select records from the list view of an entity. On clicking **"Get Geocode"** button, it performs geocoding in the background process for the selected records.

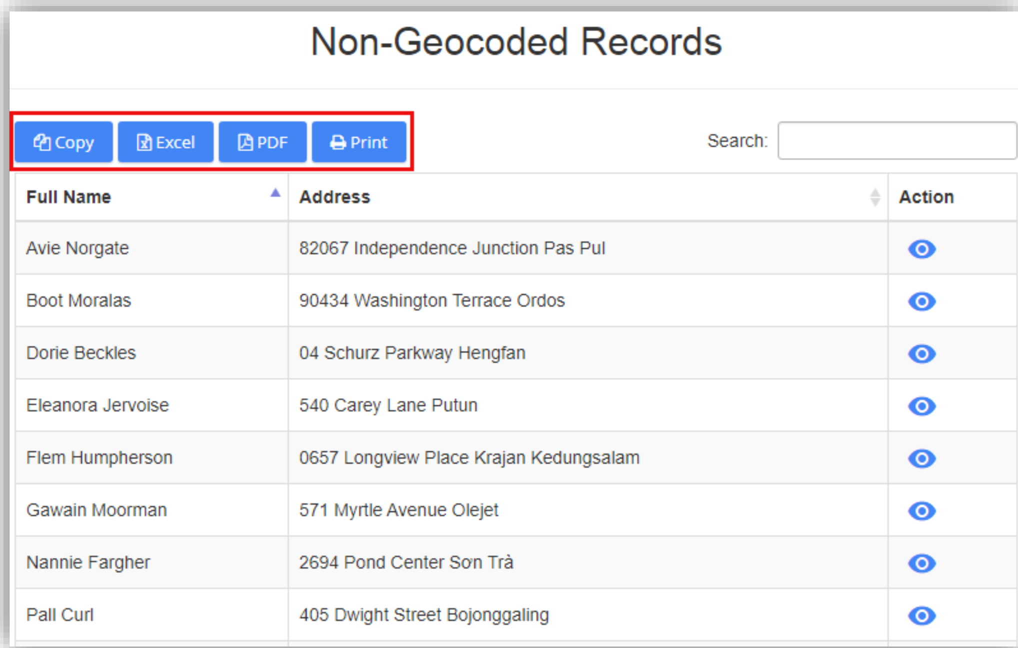
- You get option to geocode records only when that particular entity is mapped from entity mappings section.

Non-Geocoded Records

- Navigate to the entity for which you want to get a non-geocode detail. For example, if you want to get idea on non geo coded 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 button under action column.


Non-Geocoded Records

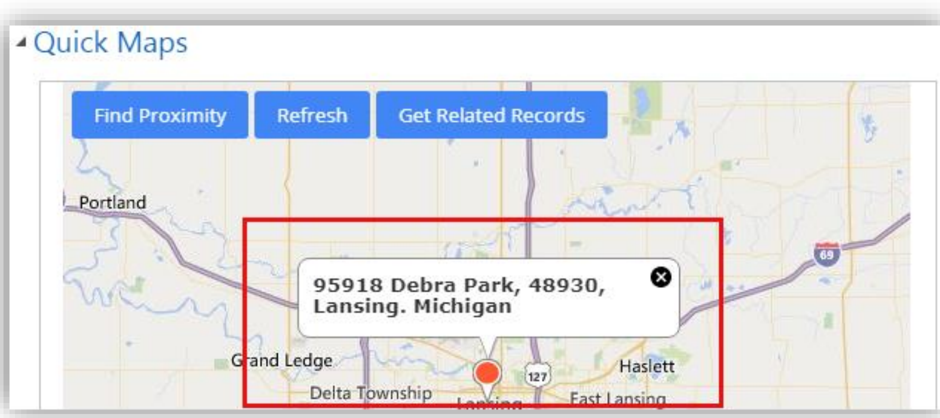
Copy Excel PDF Print Search:

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 Sơn Trà	
Pall Curl	405 Dwight Street Bojonggaling	

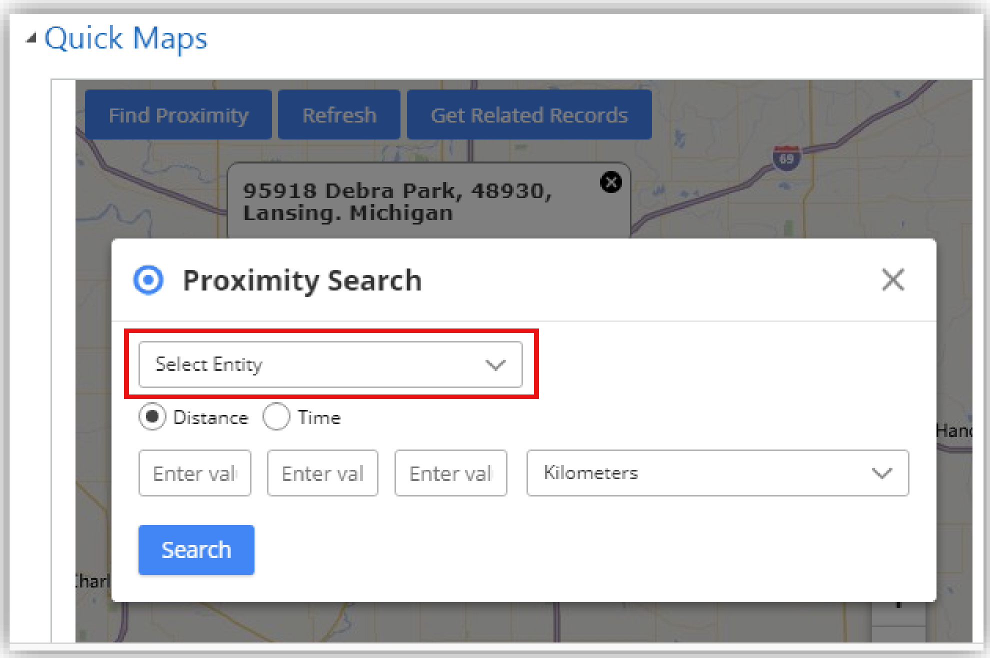
- For the list generated, you can also perform actions like **Copy, Excel, Pdf, Print** and **Search** as well.

Individual Record Map

- In detail page of record, there is a separate Quick Maps section. On map there is pin plotted based on address entered for the record. Along with that there are three action buttons like find proximity, refresh and get related records.



- Clicking on Find Proximity button, you can perform proximity search from that particular pin and find records nearby. It would show records based on entity selected from the dropdown.



- Refresh button would just refresh the map to default map type removing any action performed on map.

- Get related records action button would fetch all related records to the plotted pin based on relationship set from the configurations section.

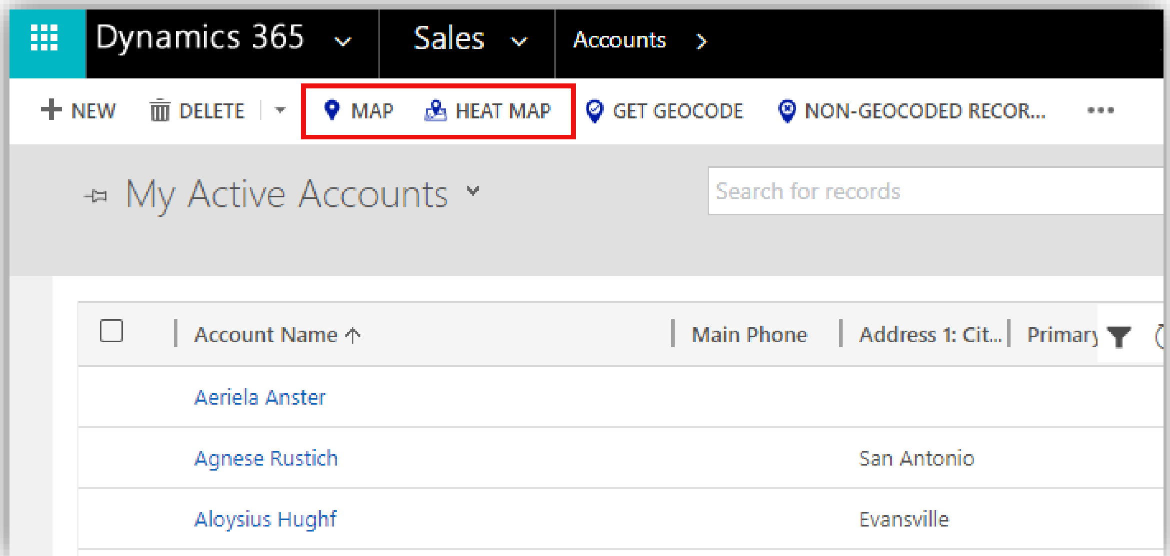
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving it would prompt a confirmation message. Click ‘**ok**’ to continue.

- You can update latitude and longitude using record map for records of Account, Contact and Lead Entities.

Individual List Map

- In list page for an entity, there is a map option provided. By clicking on that map option, you can directly navigate to maps for that particular entity.

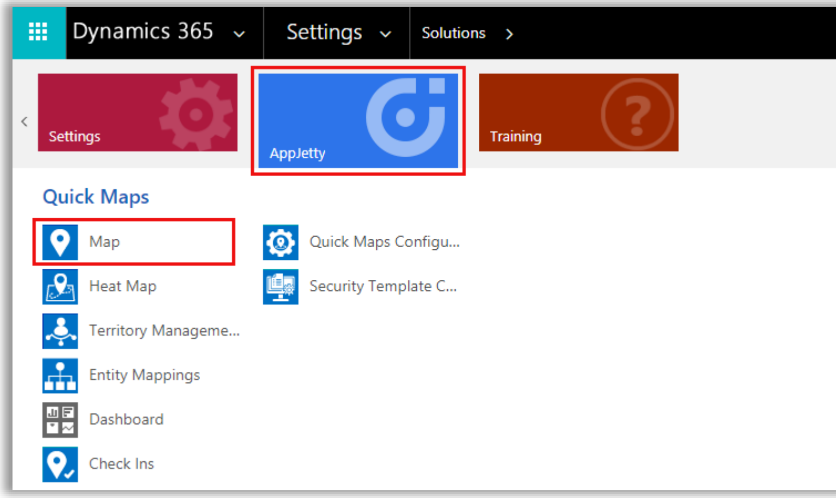
- Along with the map option, you can also navigate to Heat Map as well by clicking on Heat Map option.



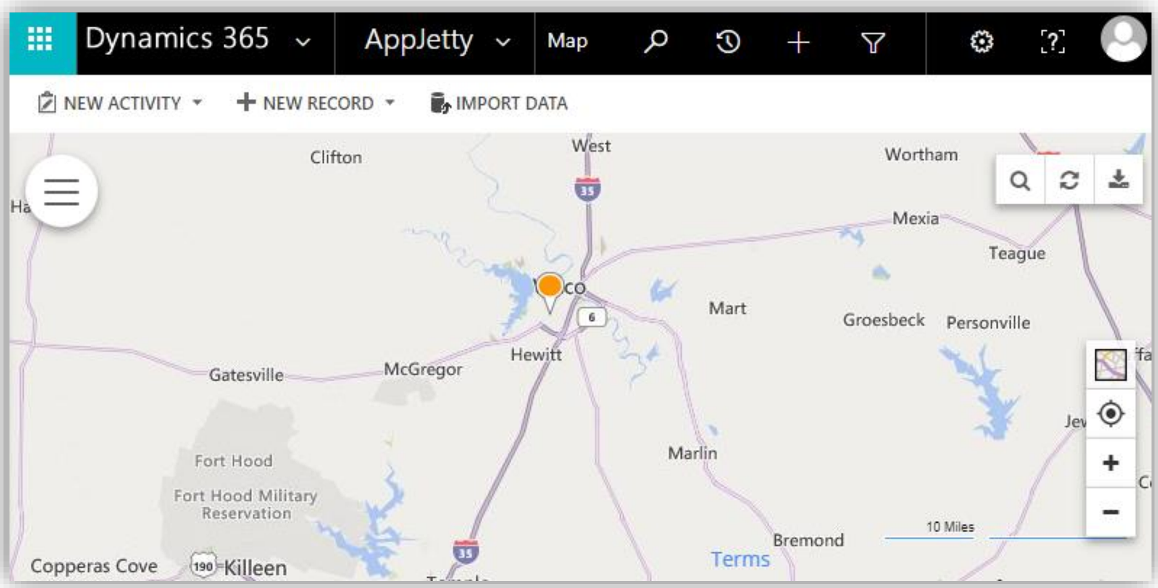
- Using Map option in marketing list, you can view all the records within marketing list on map.

Map Configurations

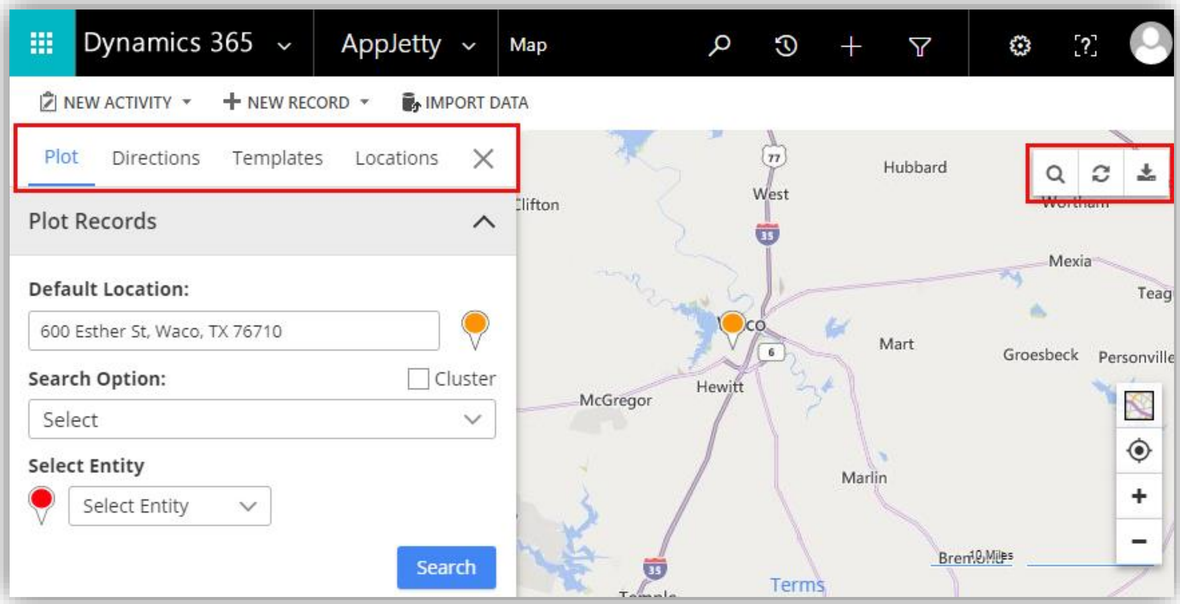
- Navigate to AppJetty tab and Select Maps.



- It will open the map with the default configurations you have set from advance settings.



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



- You will have four options to open/view records in maps.
    - Plot
    - Directions
    - Templates
    - Locations

- Along with these options, on the right-hand corner of the map you will see three options: search, refresh and download map.

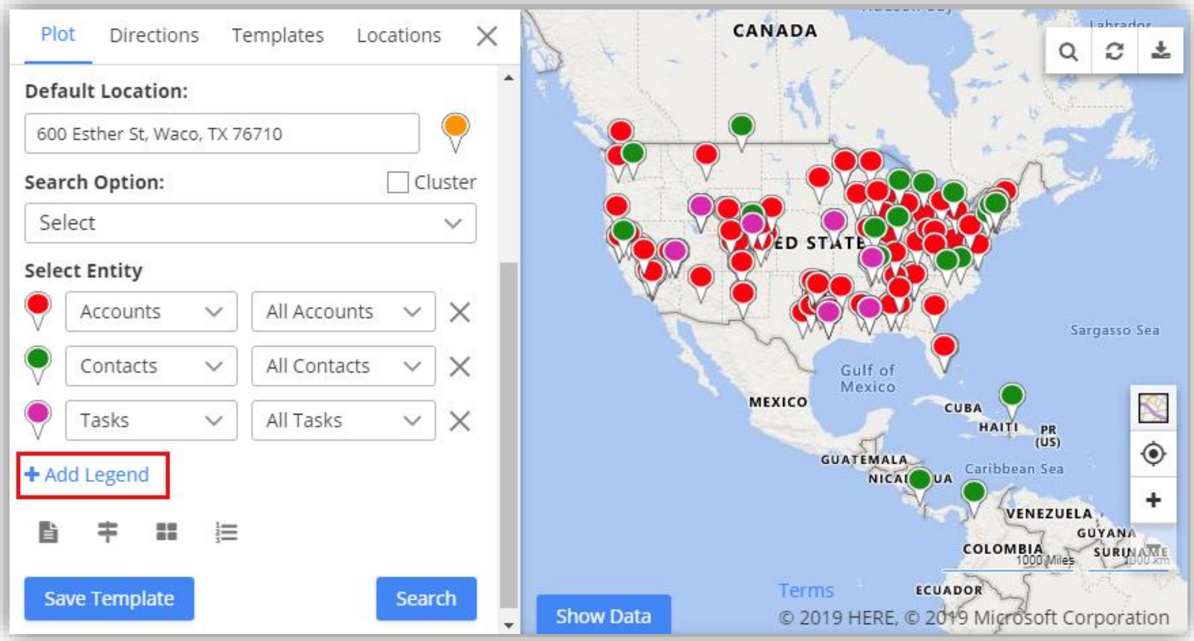
Plot

- On map, you can select entity and its view from the dropdown based on entities that you have mapped.

- After selection of entity and its view, click on Search button to plot the records.

- On selection of any customer related entity, pins get plotted based on account, contact or lead related to that entity.

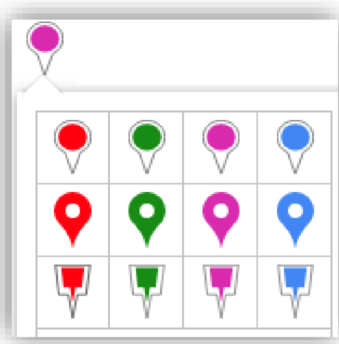
- For view selection of an entity, you will be able to select custom view as well if it is created from the CRM side.



- For Example, if "**Account**" is selected with a view of "**My Active Accounts**" then it will plot active accounts on map based on their location. And for activity entities, it will plot based on the location of the customer (account, contact or lead) record related to the entity.

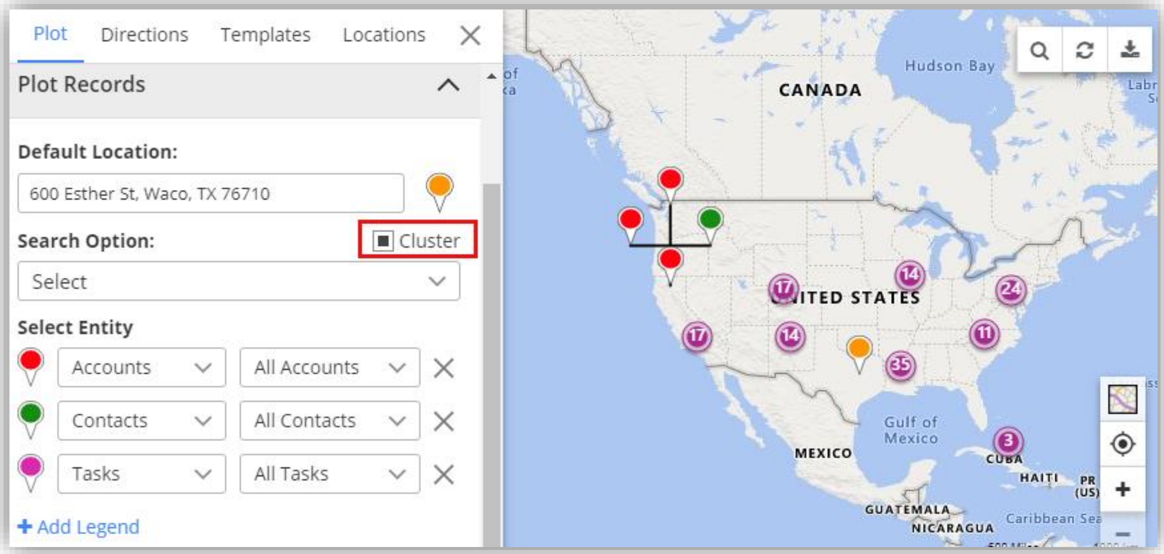
- If activity entity (Account, Contact or Lead) is mapped, only then the records of customer related entities will be plotted on map.

- Multiple legends can be added by clicking on "**Add legend**" button.



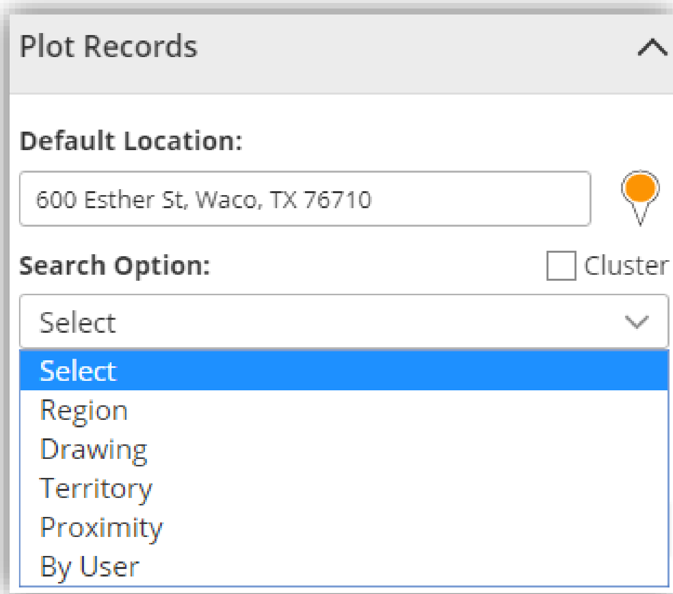
- Multiple pin options are also available to differentiate multiple legend records, options will be listed by clicking on existing pin.

- For all the pins added on the map, there is an option available to cluster them. To cluster map pointers, check the box provided under plot records section. The pointers will get clustered based on the proximity. Number on cluster indicates number of markers it contains. On clicking any cluster, it will show all the pins in spider cluster form.



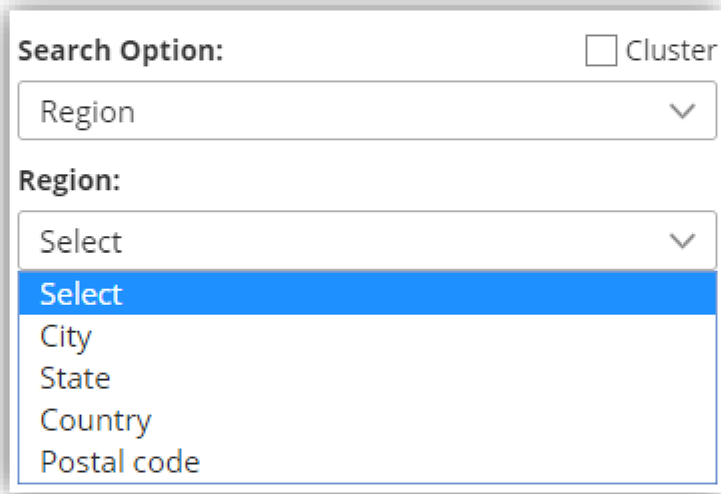
Note: On zooming in to the map, number of pins in the cluster decreases and you get to see individual markers on map. Whereas, when zoomed out, it consolidates the markers into clusters again.

- Also, you can plot records in particular entity based on different search options directly like plotting based on region, drawing, territory, proximity and by user.

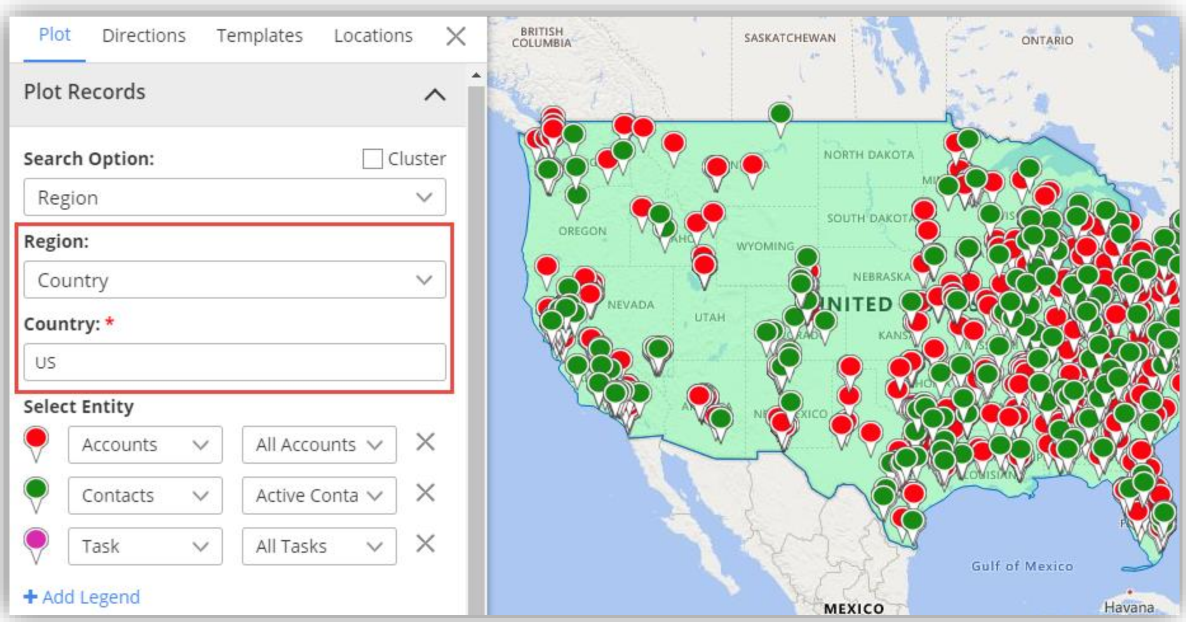


- **By Region:**

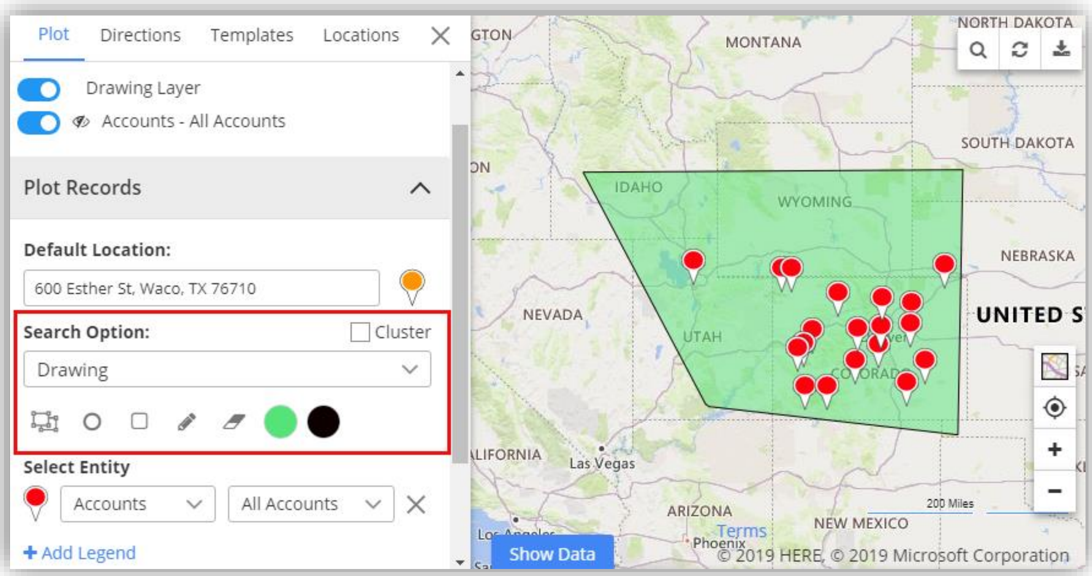
  - By region option lets you to plot records on map based on region of your choice. The various regions that you can select one from are City, State, Country, and Postal Code.



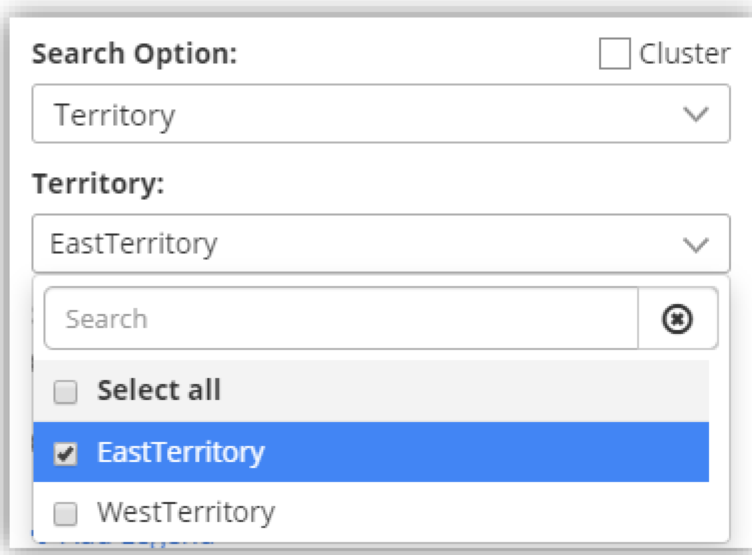
  - Here on selecting region type to be country, whole country gets highlighted on map along with plotted pins that come under that country.



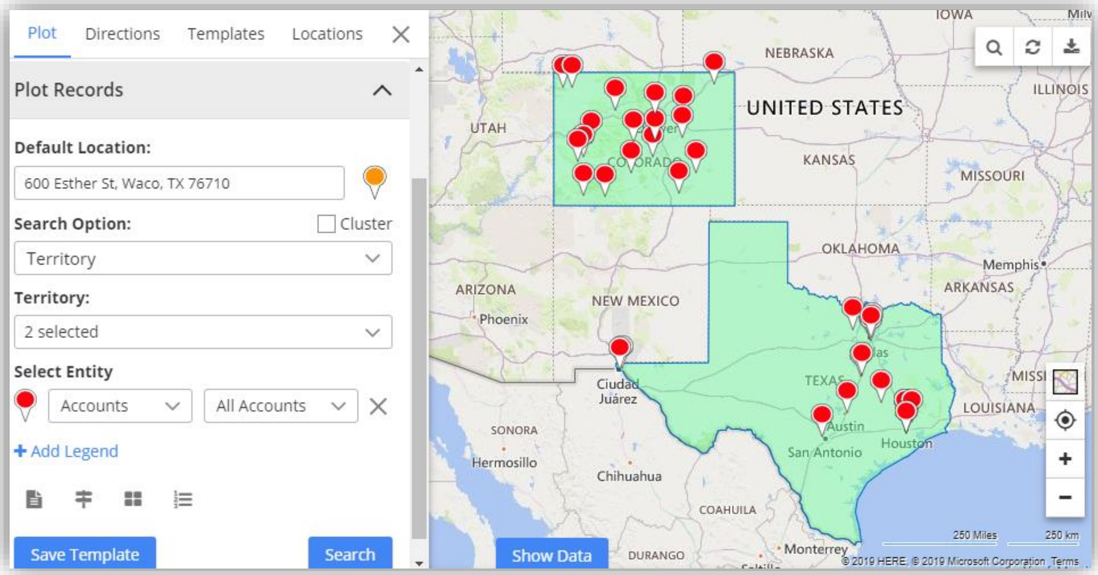
- **By Drawing:**
  - This option lets you plot details based on different shapes as drawn by you. For drawing, drawing tool is used.



- **By Territory:**
  - You can also view records on maps based on territory. In order to view records based on territory, you first need to select territory as search option. It will show all the territories in the territory dropdown. This dropdown would show those territories also that are created from shape file or one created under territory management section.

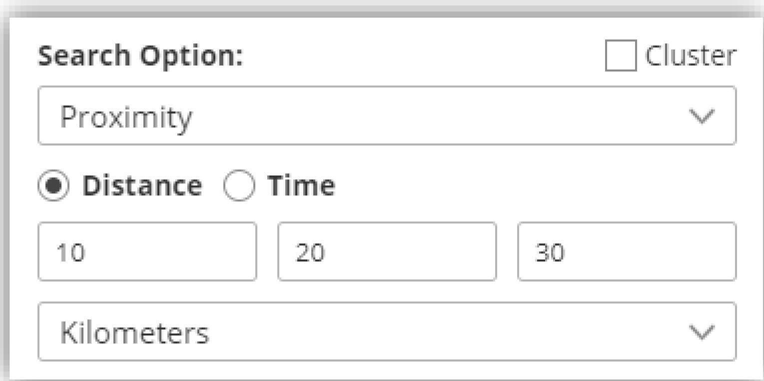


- On clicking Search, all records that fall under selected territory will be plotted on map.

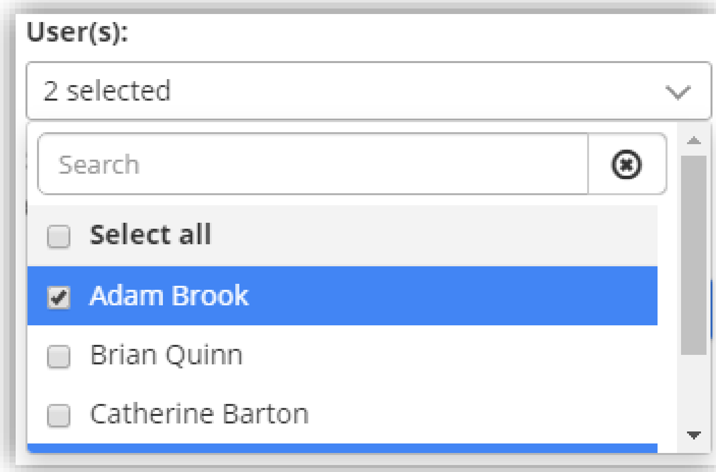


Note: In order to select territory, territories should be defined by you along with their territory manager in CRM. To manage territories, follow these steps: **Settings > Business Management > Sales Territories.** Also, territories reflect based on territories created under territory management section.

- **By Proximity:**
  - It lets you view nearby records in proximity from current location based on time or distance. You can define distance either in miles or kilometers as well as time in seconds.



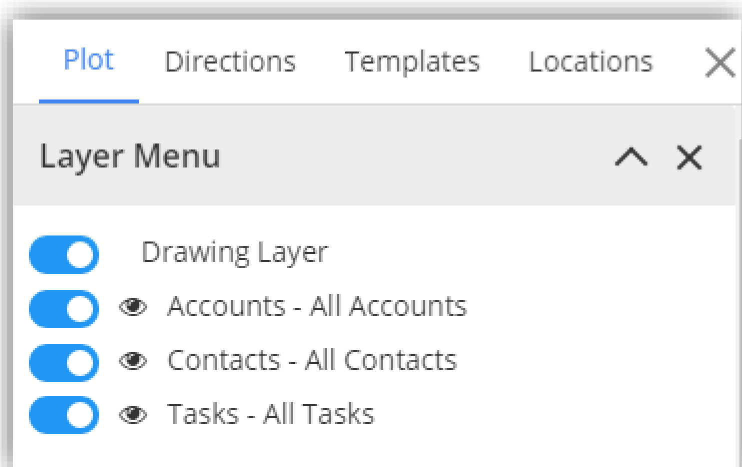
- **By User:**
  - You can plot records based on user. It would plot all records created by the selected user. This search option is available only to users with admin role.



Note: After selecting any of these search option, you need to click on the Search button to plot based on selected criteria.

Layer Menu

- With every plotting on the map, it would show each plotting as layer.

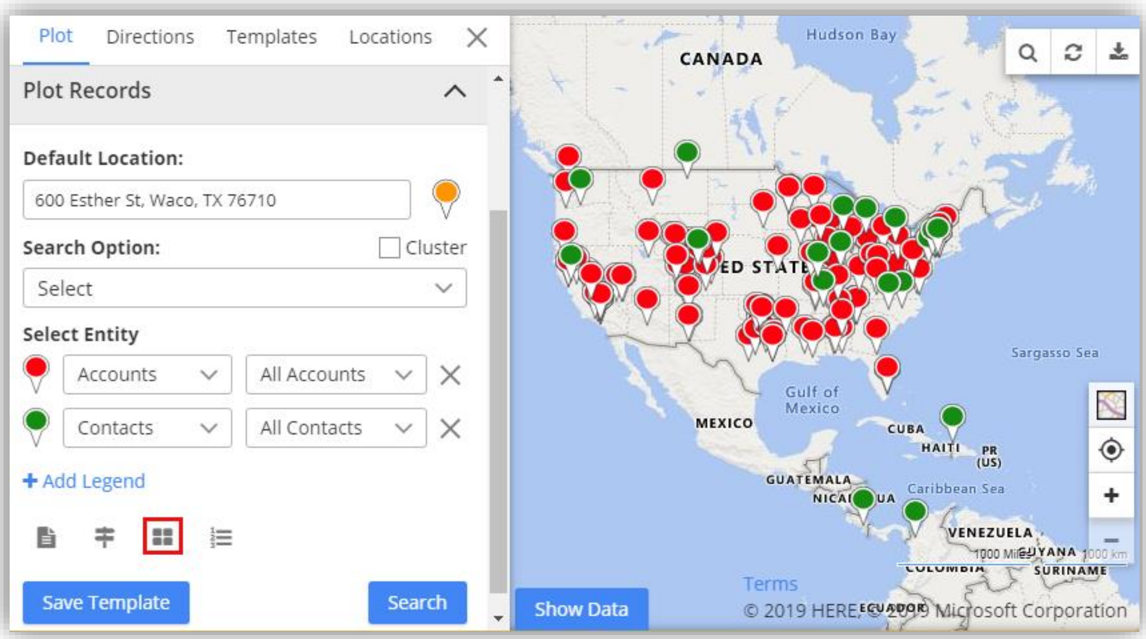


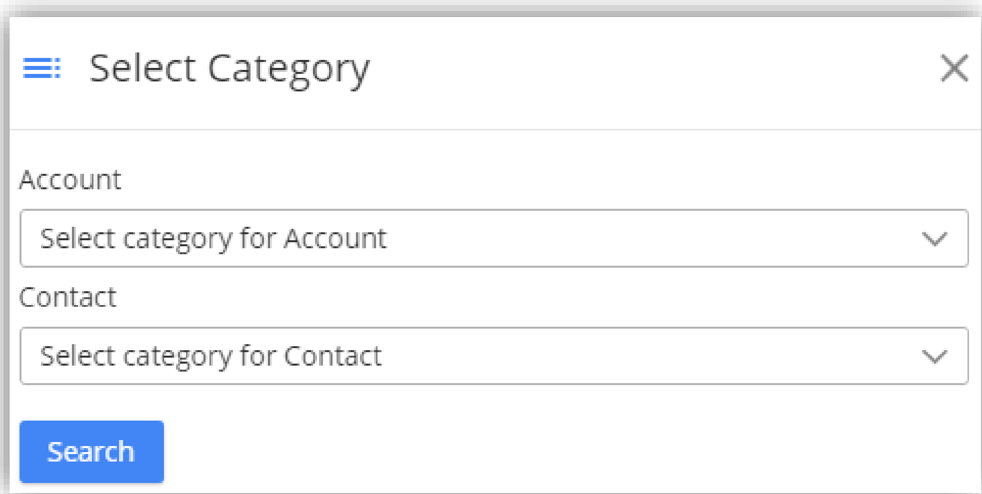
- User can select just the required data from among the plotted data on the map. To select required data, user can use toggle buttons to show or hide the layers of different plotted data.

- Also, you can click on show label button (eye icon) to view labels for the pushpins. Option of hiding/showing labels is available for every layer plotted on the data.

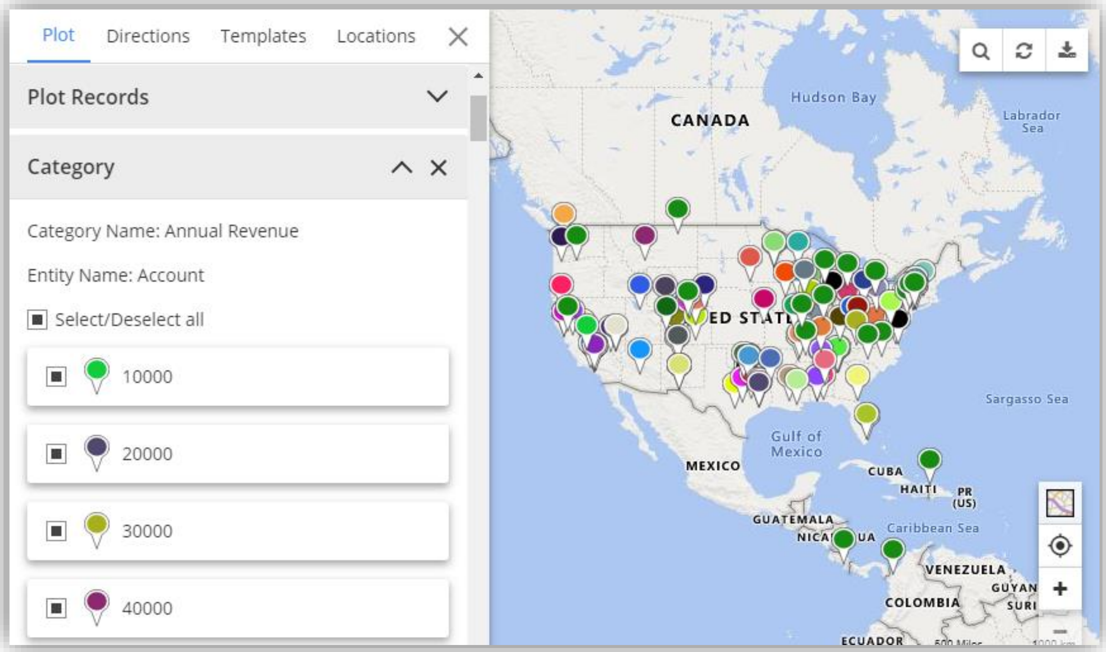
Category Search

- 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 entity configurations section.





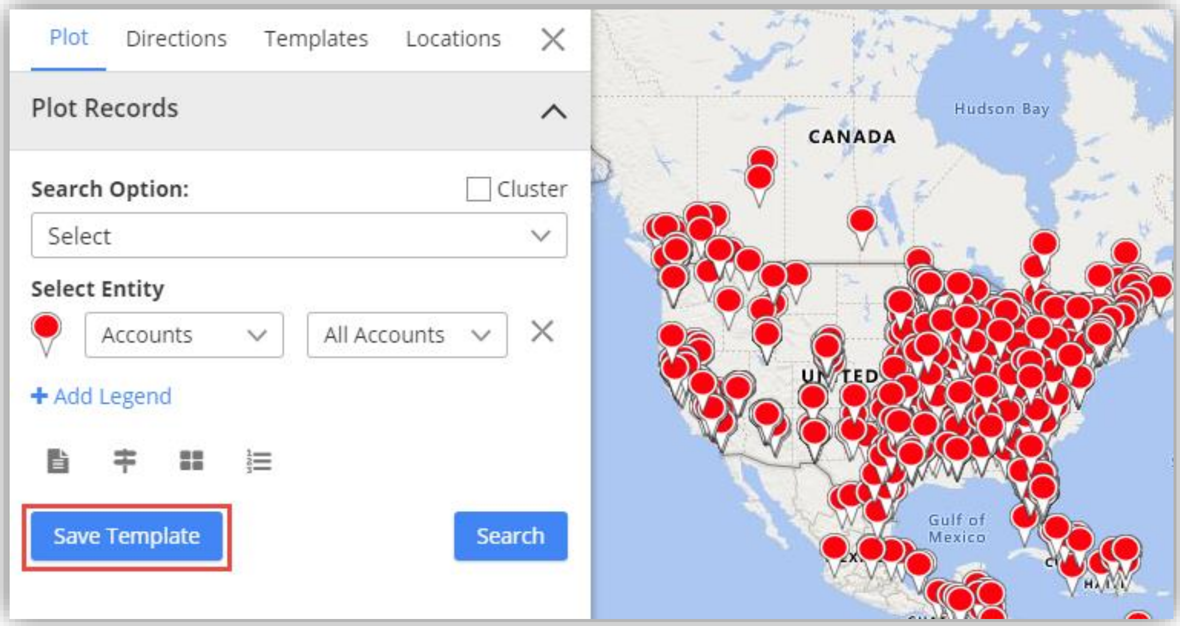
- Next user needs to select attribute based on which record should be plotted. Here, it would show dialog box for attribute selection for each entity. You may select one or many.



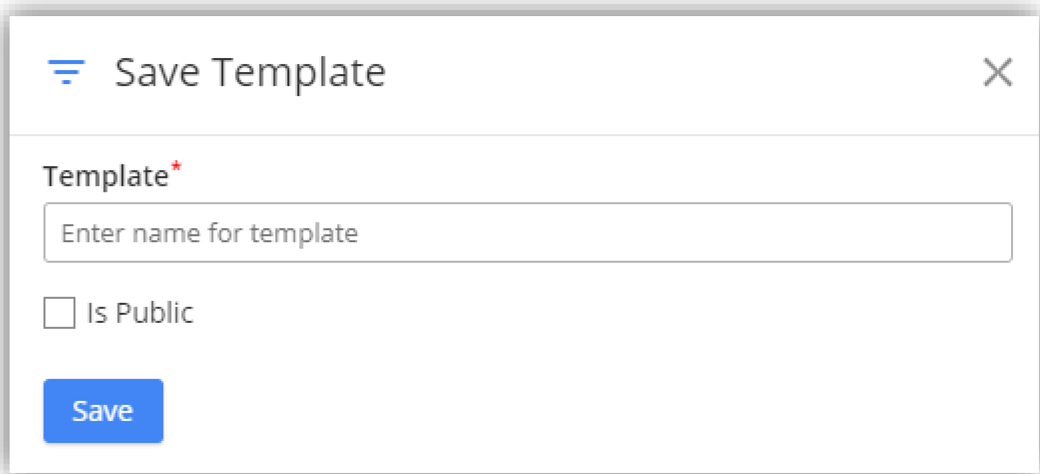
- Clicking on **'Search'** button will plot pins based on attribute selected and shall enable '**Category'** section which can be used to view category legend and from there select/unselect records based on requirement.

Save Template

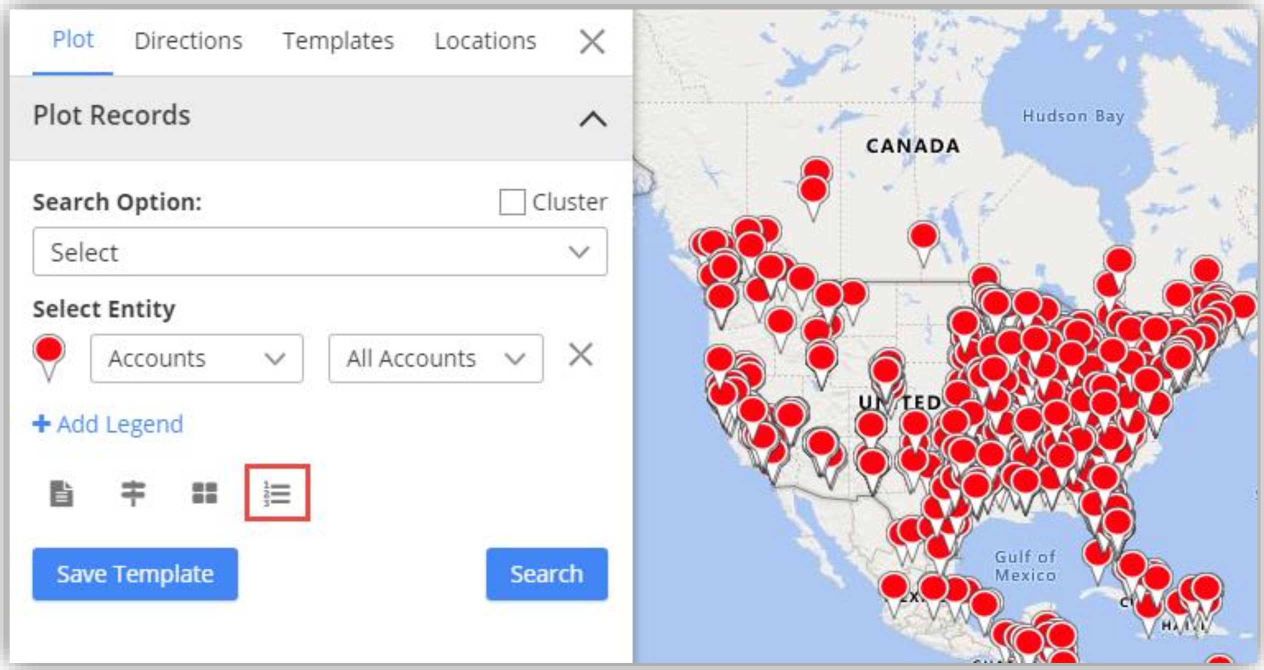
- All the plotting made along with zoom level configurations can be saved using Save Template option available.



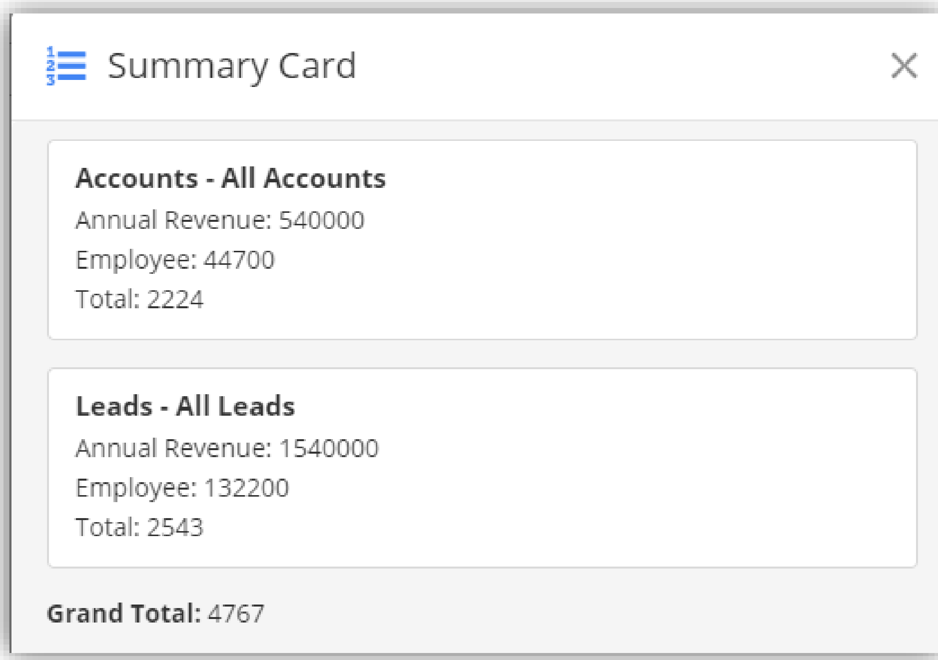
- On clicking Save Template button, a dialog box opens up for you to give a name to the template. Moreover, you can check the box "**Is Public**" to make the template public. Then click on save button to save the template for future reference.

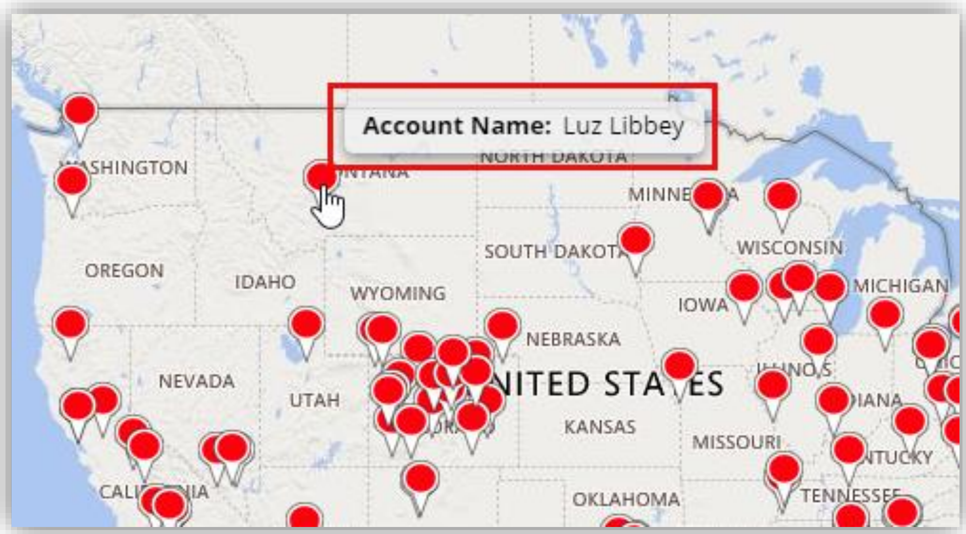


Summary Card



- 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.





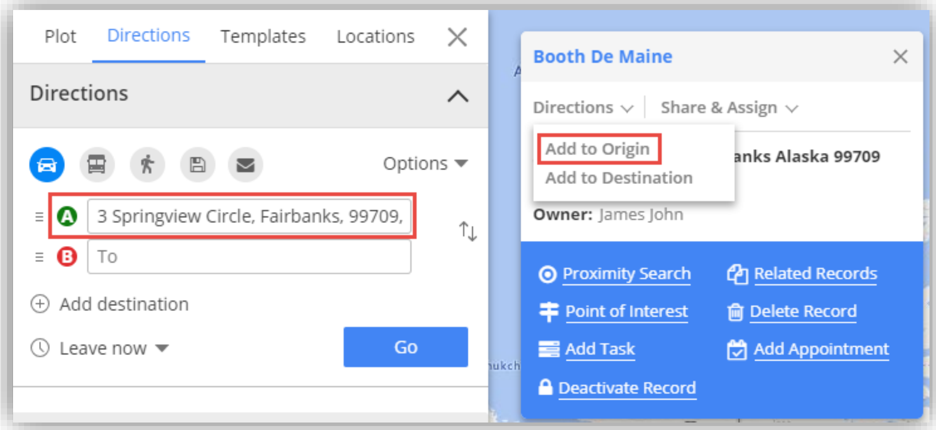
- You can view record name by hovering on any pushpin. Information shown on hover is completely customizable.

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

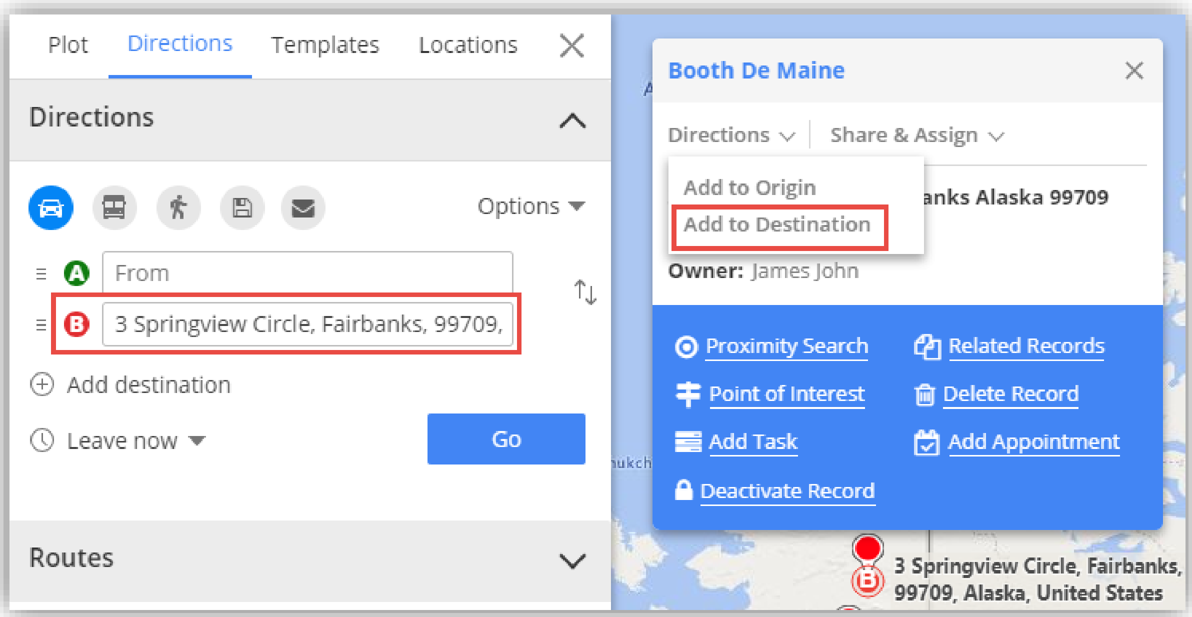
- Along with details there are actions buttons available in the pop-up. These action buttons will let you perform different actions related to Directions like: Add to origin and Add to destination while related to Share and Assign like: Send Email, Assign Owner, and Add to Marketing List. These action buttons are present by default on record of every entity and these buttons cannot be changed.

- Also, there are some other actions that can be enabled or disabled from the entity to map page under actions configuration section. They are: Proximity Search, Related Records, Point Of Interest, and Delete Record. Other than these, there are few actions buttons that are dependent on the selected entity.

- **Add to Origin:**
    - By clicking on “**Add to Origin”** option, address of particular record will be added as starting point of route under directions tab.



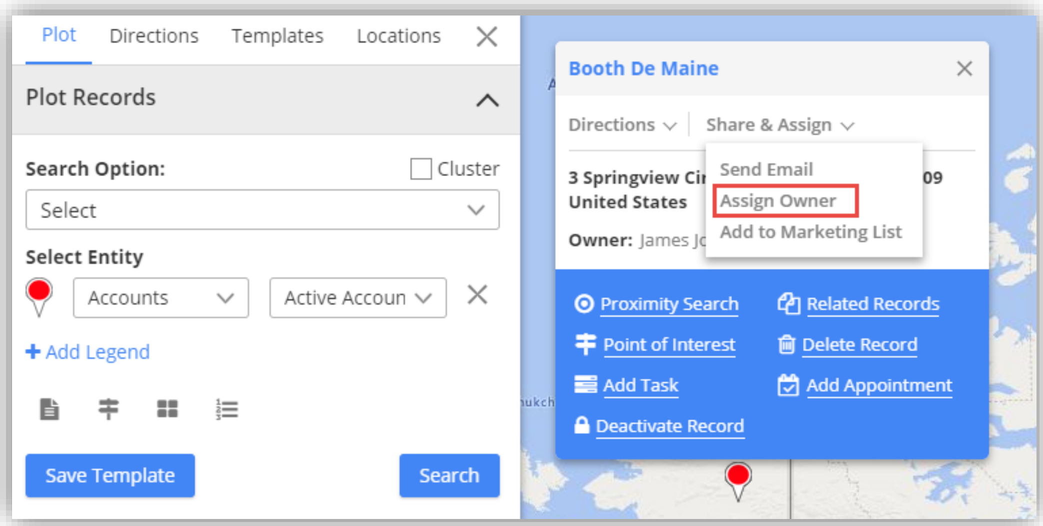
- **Add to Destination:**
    - By clicking on "**Add to destination**" option, address of particular record will be added as destination point of route under directions tab.



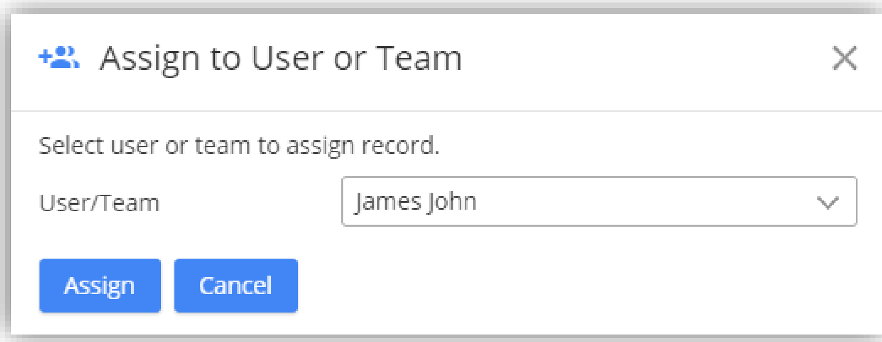
- **Send Email:**
    - To send email, click on **"Send Email"** action button. Clicking on that action button, it would prompt user to select an email template. The email templates list would have list of all the templates that are created within the CRM and custom templates as well. You may select 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:**

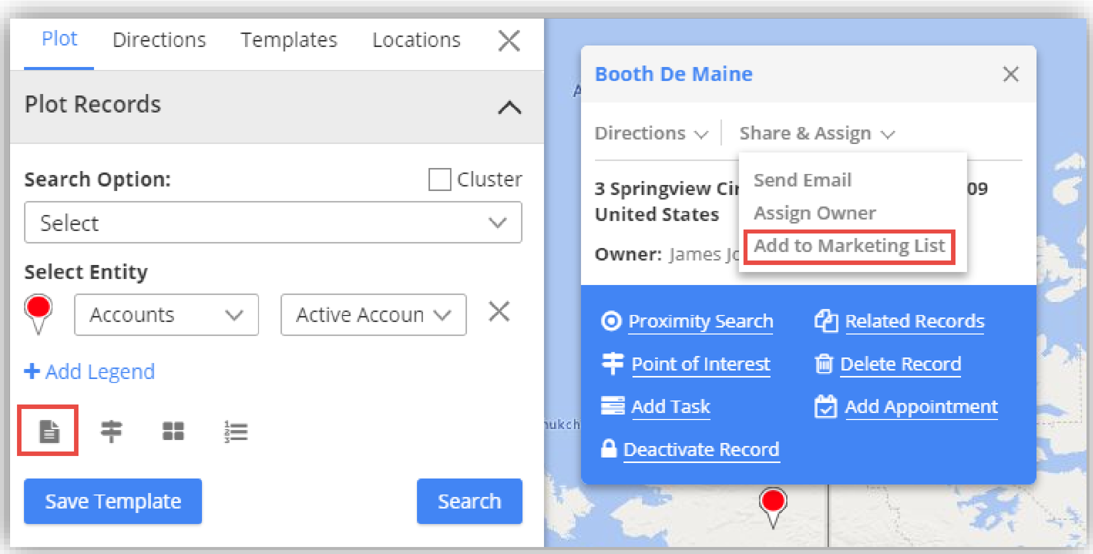


  - You can assign any record to specific user or team by clicking on **"Assign Owner"** option from specific user's details.
  - Selecting Assign Owner option, it opens a dialog box where dropdown list of all the CRM users is provided to select user or team as required. After selecting the appropriate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

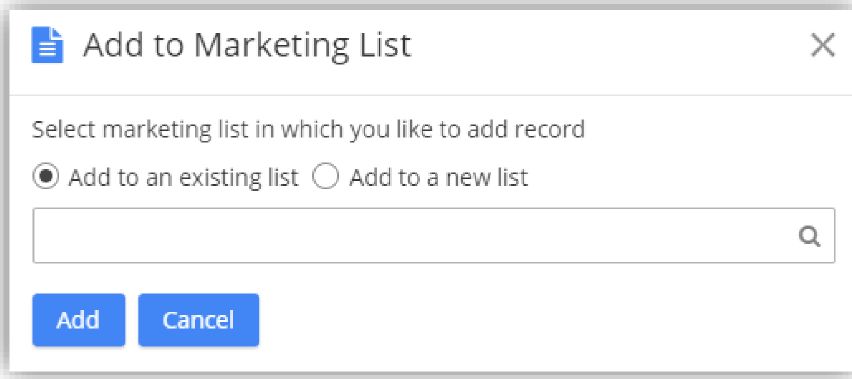


Note: When assigning record to a user or team, that particular user or team should have role assigned to it or else record won't be assigned.

- **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.

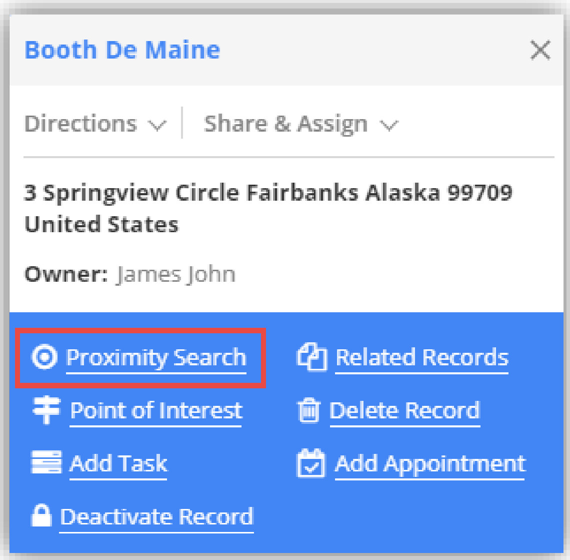


  - On clicking, you will have the option to add record either in existing marketing list or create the new one.
  - After selecting the marketing list, click on the **Add** button to complete the addition of records to the marketing list.

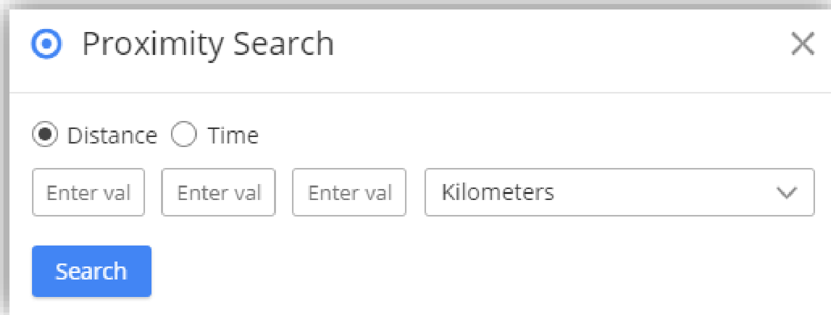


Note: Assign to marketing list icon under map section, will assign all records of particular entity to the list. Also, it will get assigned only when records of single entity are plotted on map.

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

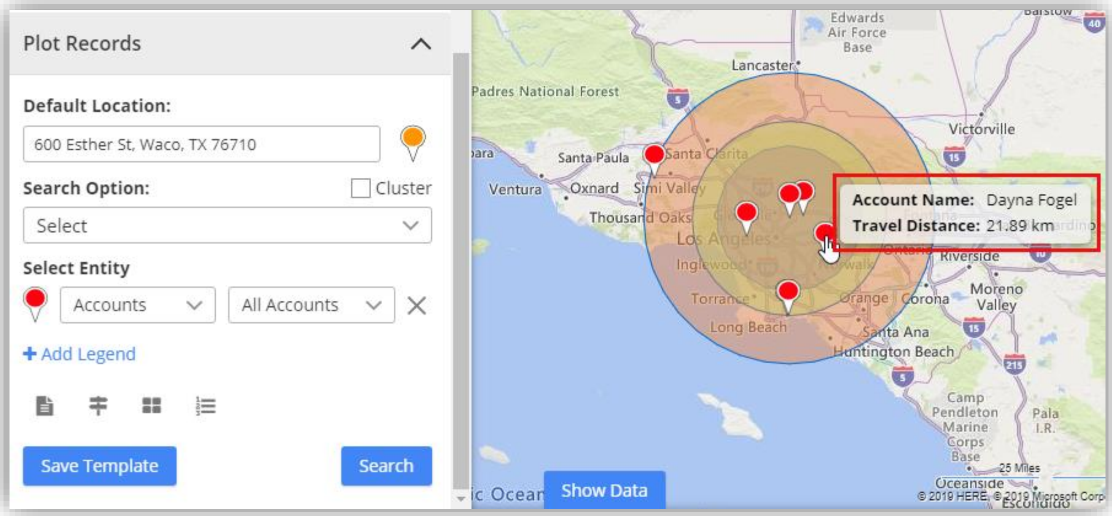


  - You can define distance either in miles or kilometers as well as time in seconds.
  - You can also perform concentric proximity search based on distance with three different values.



- 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.

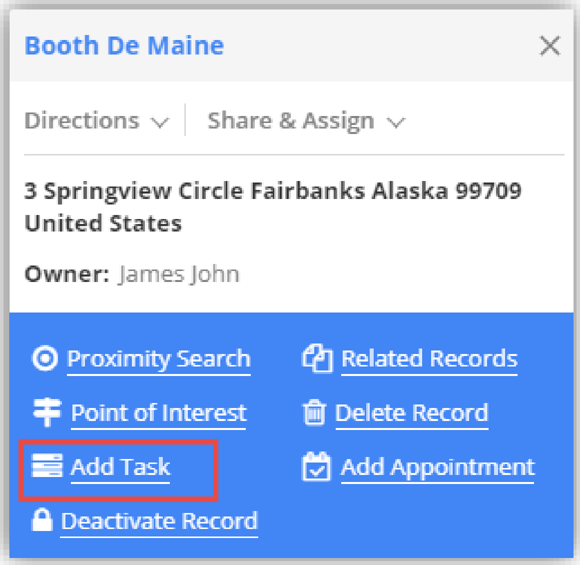
- On hovering over pin, you get details as configured along with travel distance in case of search based on distance. And travel time in case of search based on time.



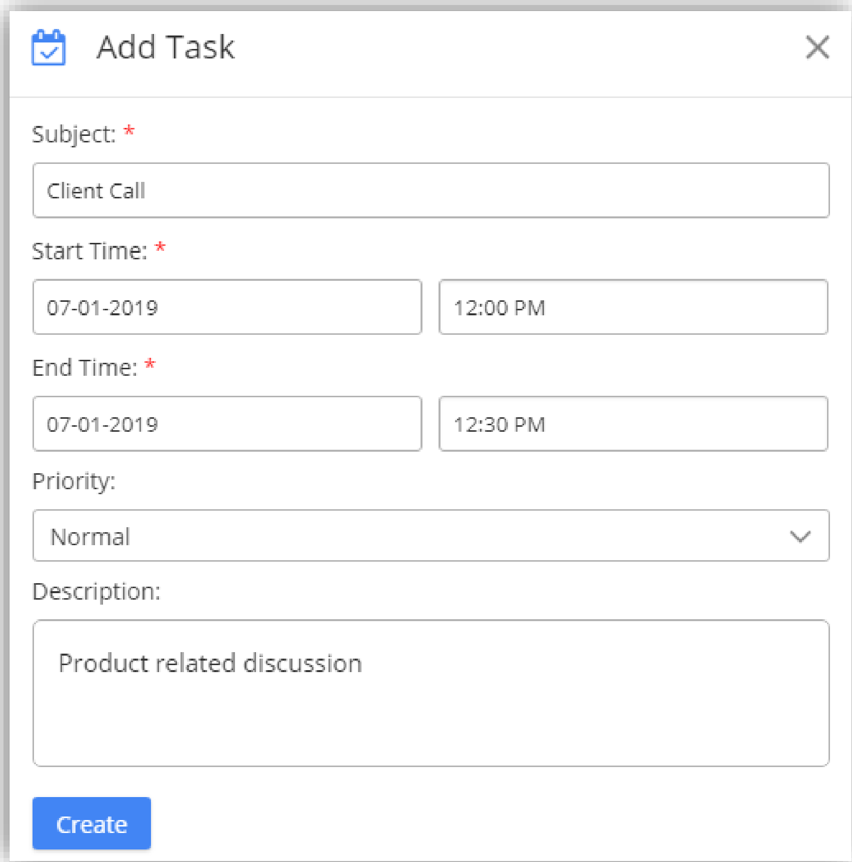
Note: When proximity search is to be done on basis of time, at max you can define 85 minutes.

- **Add Task:**

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



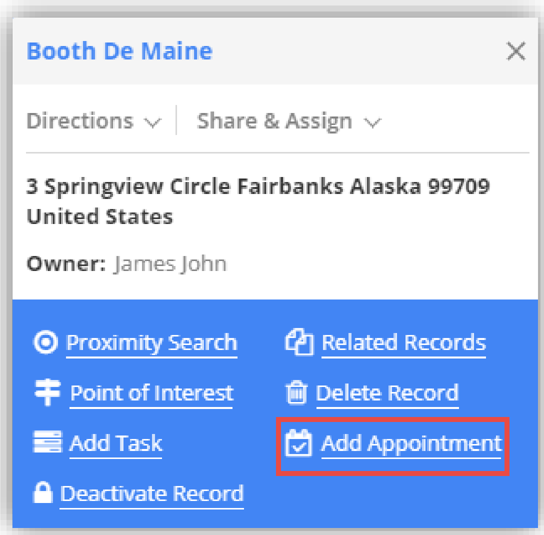
- Any task can be added for a record along with their priority such as Low, Normal, and High.



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

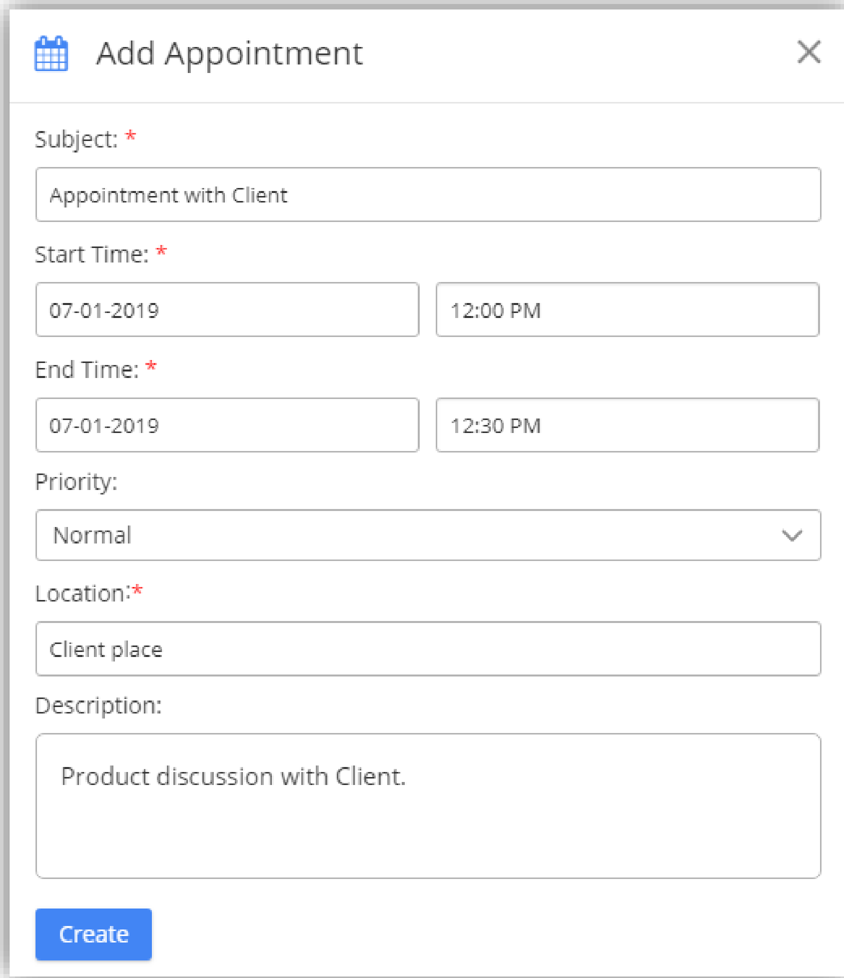
- **Add Appointment:**

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



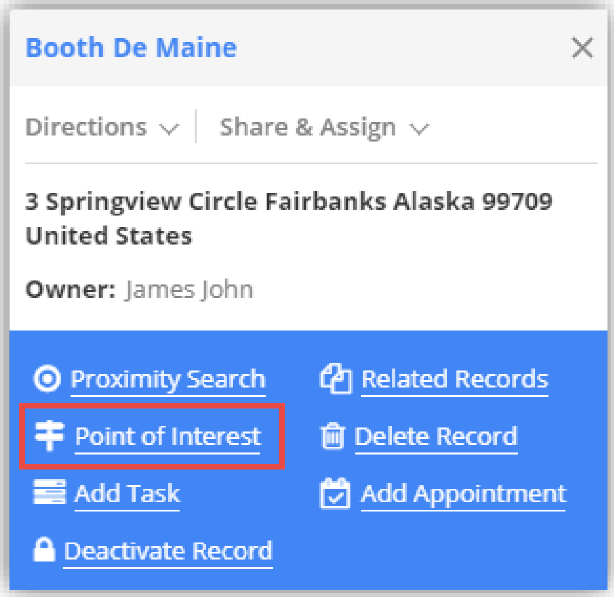
  - Appointment can be added for a record along with their priority such as Low, Normal, and High.

  - Along with priority, you can also enter the location of meeting.

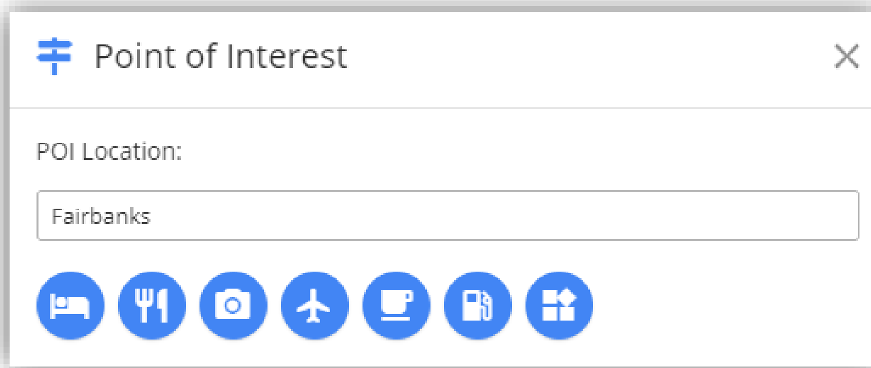


- The appointment that is added can be viewed in detailed view of record in Dynamics CRM.

- **Point of Interest:**
  - You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. by clicking on POI icon.

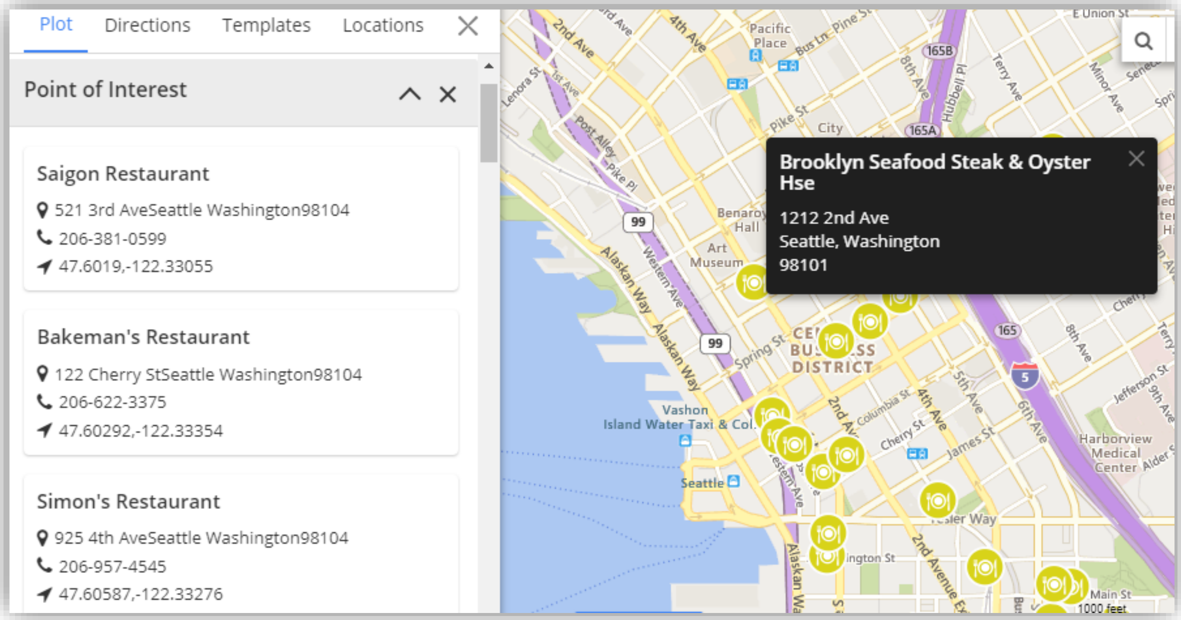


- Clicking on POI icon from particular pin, will take address of that particular record as POI location to search nearby places.

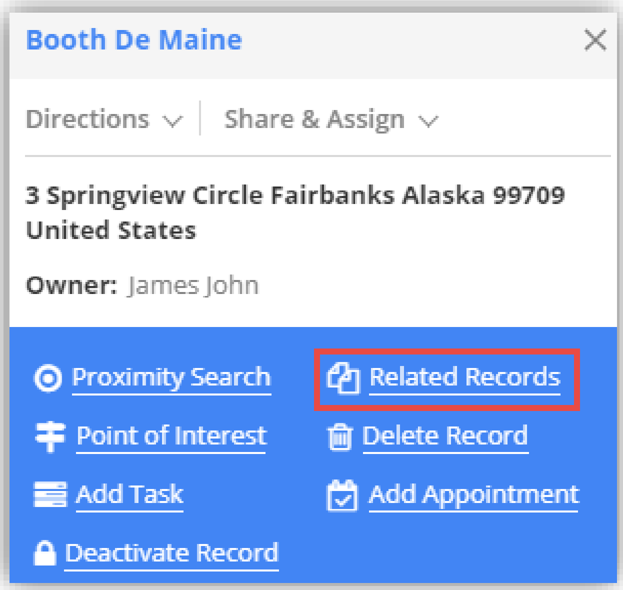


- Clicking on POI under maps tab will let you search for locations from any location that you enter.

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

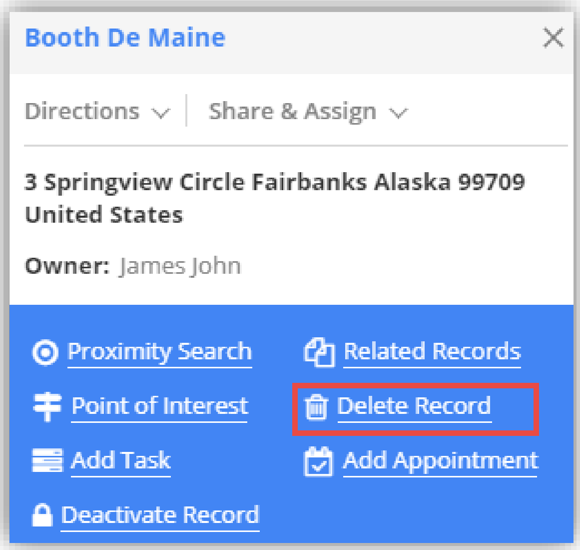


- **Related Records:**
  - By clicking on "**Related Records"** icon, all related records to the plotted record get plotted on map.

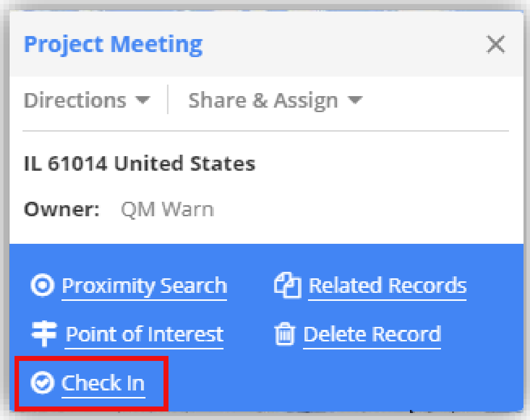


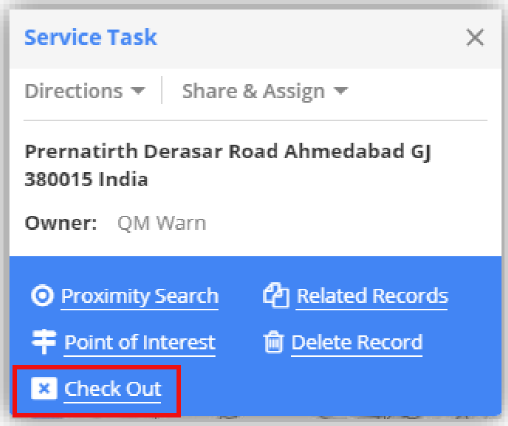
- Here, as there were three contacts associated with the account, all three of them will get plotted on the map.

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

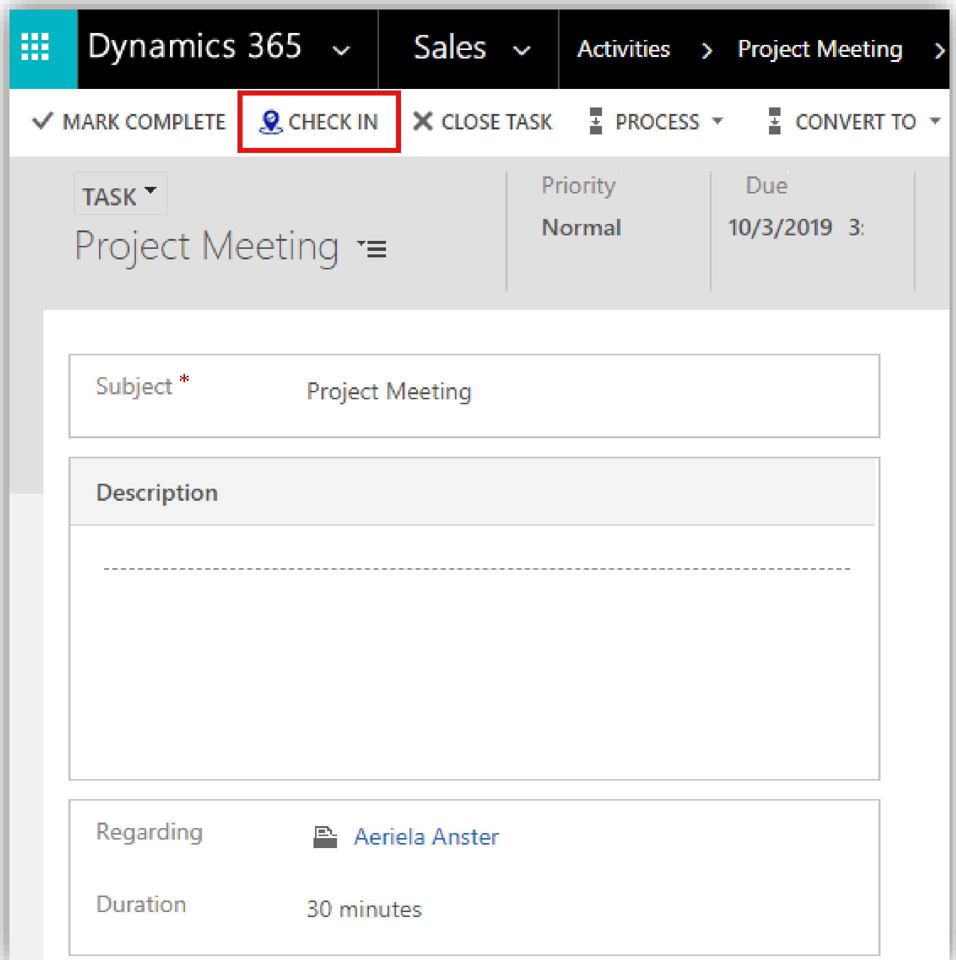


- **Check In/Check Out**
    - Users can check in to the activities like phone call, appointment, task and service activity.
    - To perform check in, click on check in icon available on the info card of an activity.

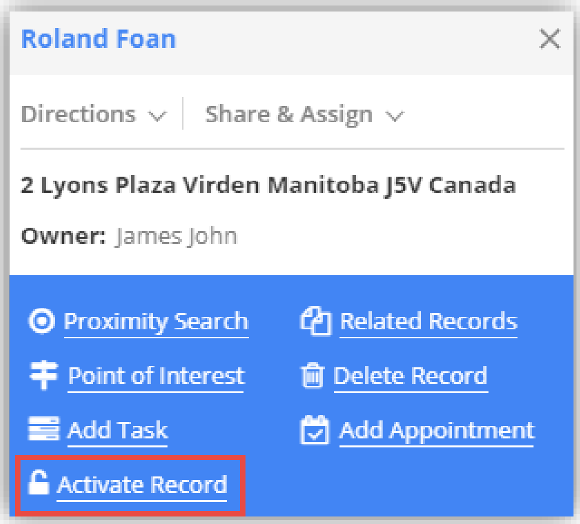




    - Once checked in, it would show action button to check out.
    - You can also perform check in from the detail view of the record by clicking on check in button available.

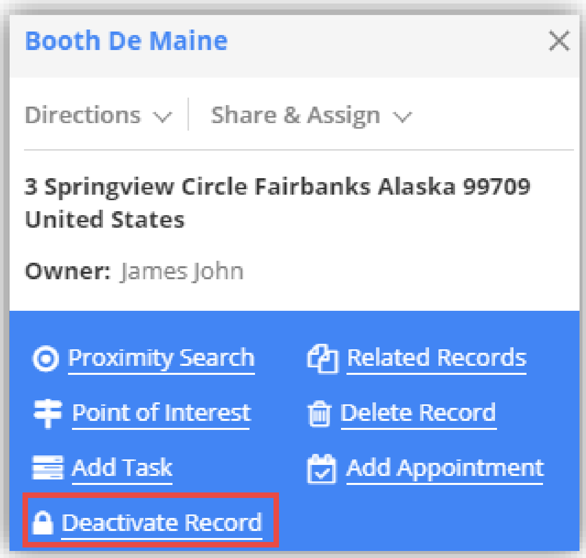


- **Activate Records:**
    - By clicking on '**Activate Records'** icon, status of the particular record gets updated to activated state. It will be available for records of only Account or Contact entity.



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.

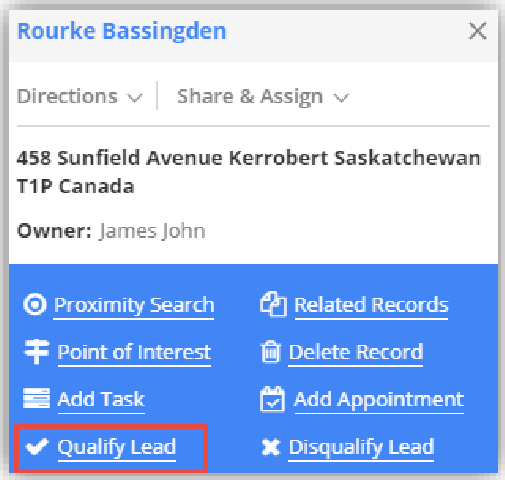


  - On clicking deactivate icon, you will get warning message regrading deactivation. Click Ok to continue.

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

- **Qualify Lead:**

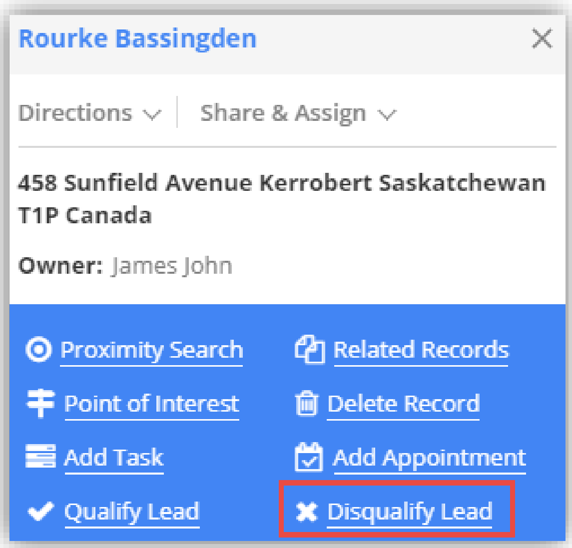
- By clicking on "**Qualify Lead**" icon, status of lead will get updated to close state and user will be redirected to opportunity page from the map. It is available only for record of lead entity.



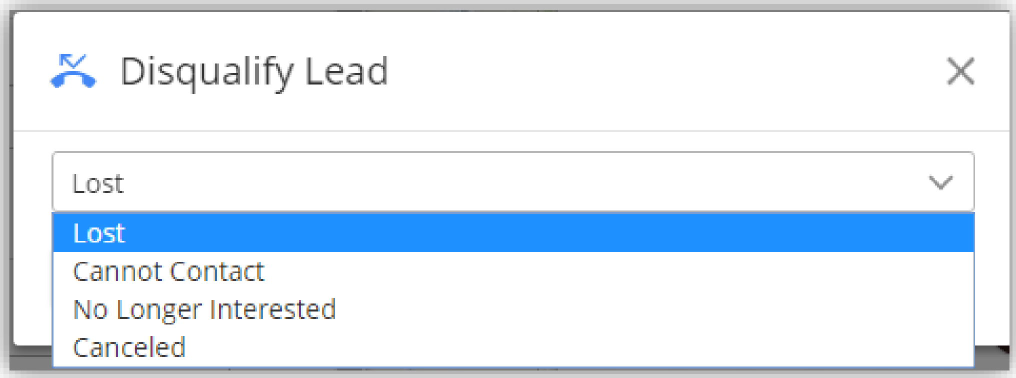
Note: Open leads will display option to qualify/disqualify lead. Once leads are qualified, those leads will be shown in Closed Leads view.

- **Disqualify Lead:**

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

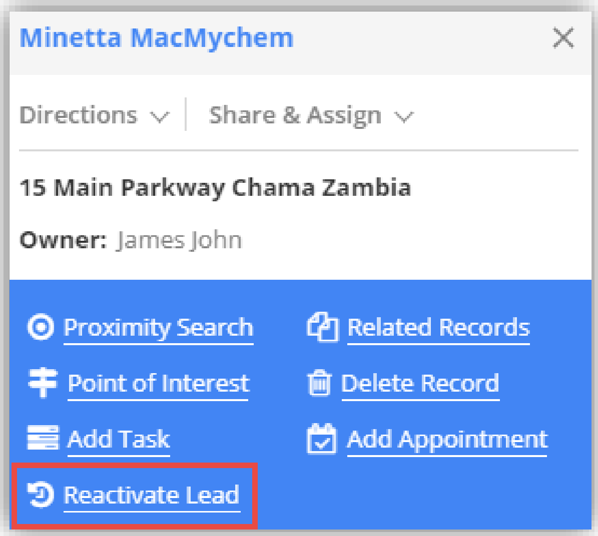


  - Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Cancelled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.



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

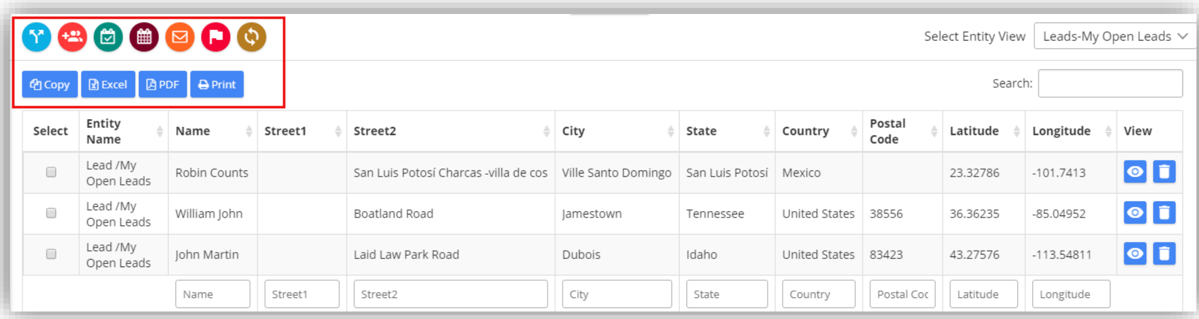
- **Reactivate Lead:**
  - By clicking on "**Reactivate Lead"** icon, leads will be reactivated, and its status will be changed to Open.



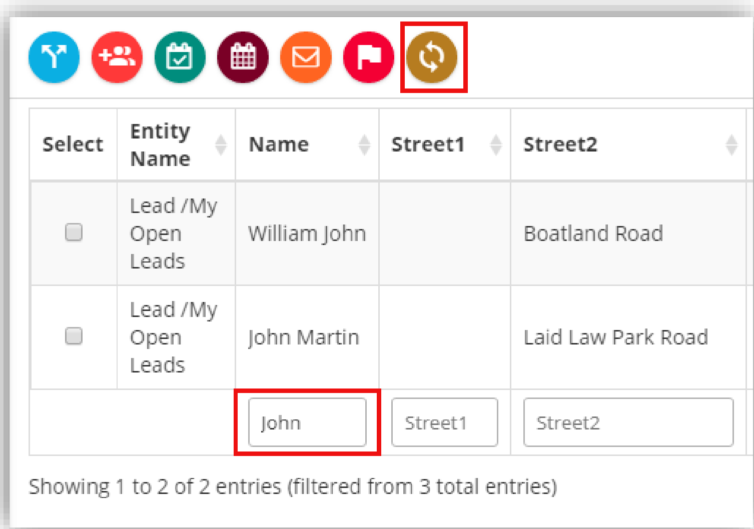
Note: On reactivating lead, view of lead will get updated from closed leads to open leads.

Data Grid

Data grid provides listing of records which are plotted on the map. To view data grid, click on **"Show Data"** tab and you can view it and also perform multiple actions like add to route, change owner, add task, add appointment, send mail and manage territory.

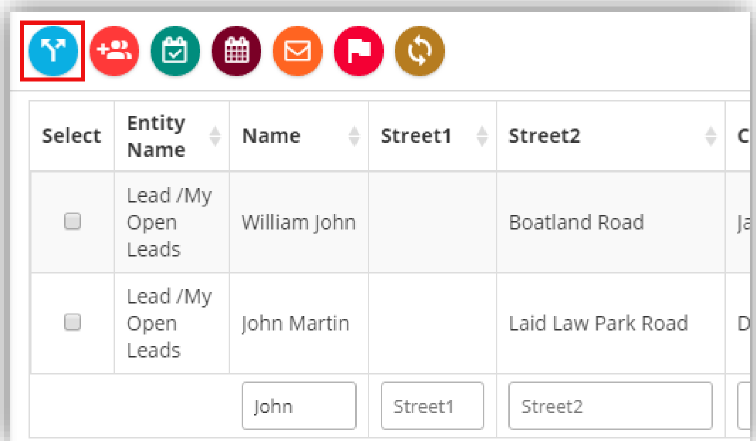


- **Copy:** By clicking on Copy button, all or selected records are copied onto the clipboard to be pasted anywhere you want.
- **Excel:** Clicking on excel button, downloads all or selected records that are available in data grid in xlsx file format.
- **PDF:** Clicking on pdf button, all or selected 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.
- Clicking on view icon, particular record will get opened in CRM. By clicking on delete icon, it deletes the respective record from the CRM.
- Data in data grid is displayed according to entity selected in the dropdown. Based on selected entity, data will be updated in grid as well as the pin color of that entity will be highlighted on map.

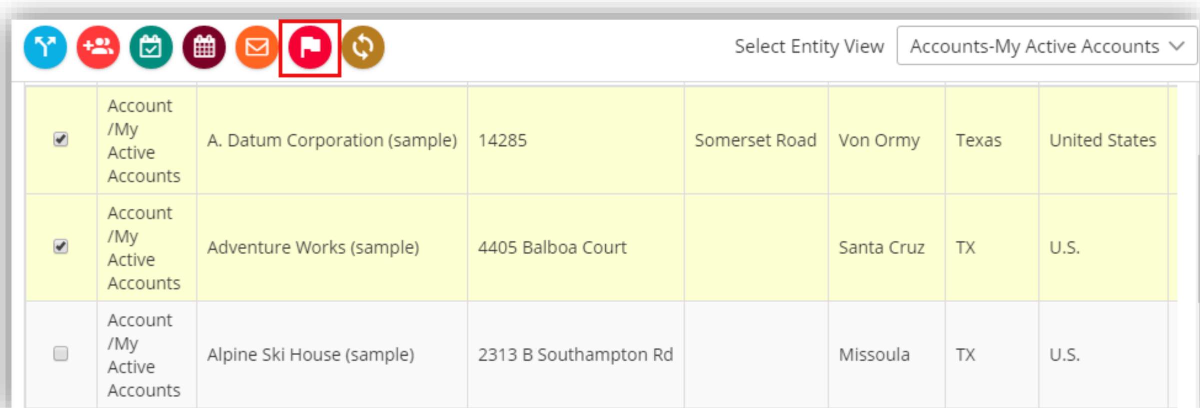


- Data filtration is also available for data present in grid. To reset the filters applied, click on reset icon.

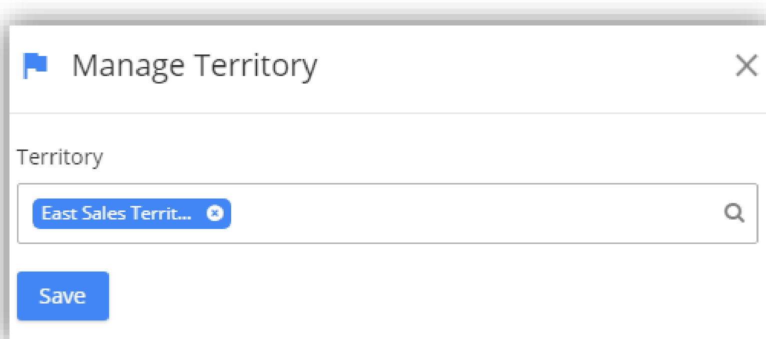
- Other actions like add to route, change owner, add task, add appointment, send email can also be performed by selecting records within the data grid.



- You can select a record and add address of that record to the route by clicking on Add to Route icon. Added address can be viewed under directions tab.



- You can directly add selected records to the territory using the "**Manage Territory"** icon.

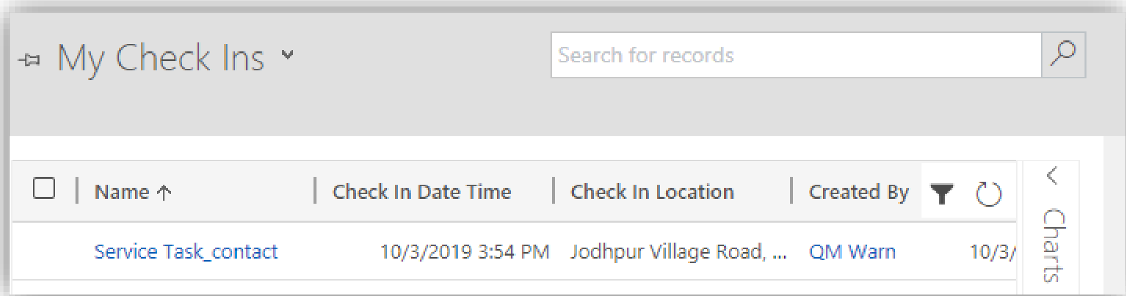


Note: To perform any action from data grid, it is mandatory to select at least one record.

Check Ins/Check Outs

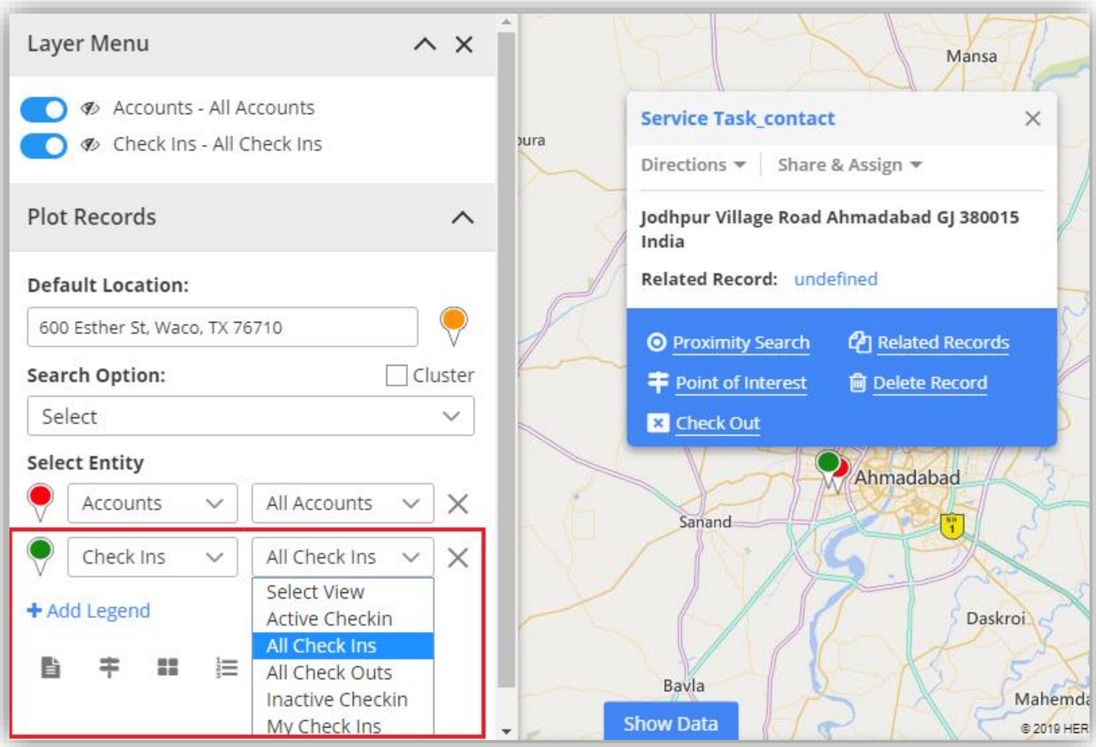
- Check In feature enables admin/user to keep track of exact time spent behind an activity. With the help of check in/check out button, you can tag geocoordinates of the location and time while starting and completing an activity.

- Navigate to AppJetty tab and select Check Ins. It will list all the check in records.



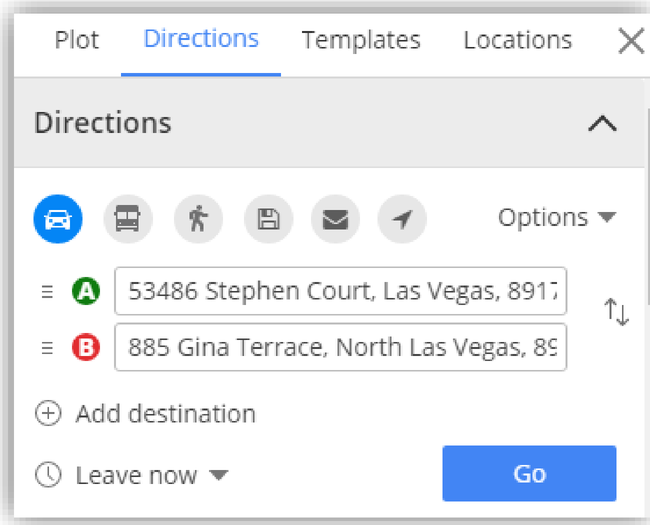
- Check in takes the address of the record regarding an activity and lets you perform check in only when address is found. The user will only be able to check in if they are in the check in radius as configured by the admin.

- On map as well, you can plot check in entity and its corresponding view to have idea of all check ins.

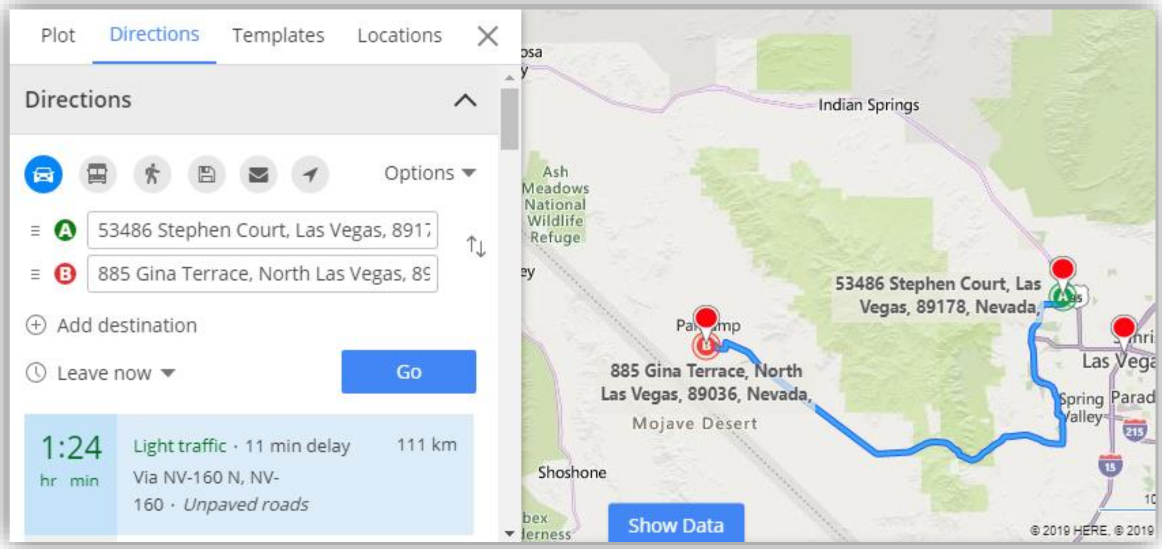


Directions

- From **"Directions"** you can get route from any location to your customer's location.
- Navigate to directions tab and add the Starting and Destination point.



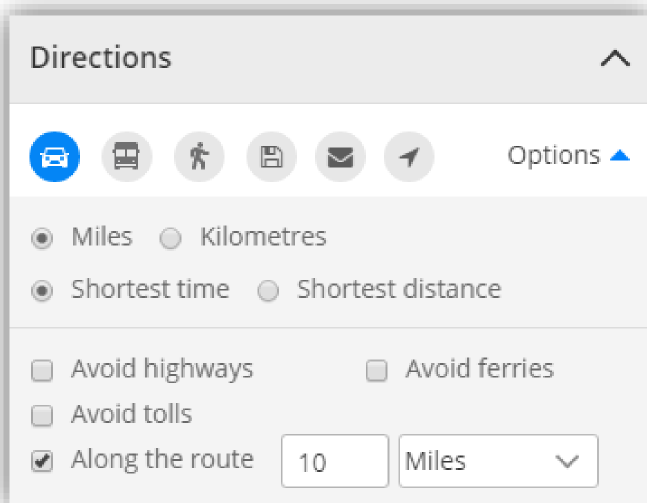
- Click on '**Add Destination'** to add multiple way points. You can maximum add 25-way points.
- Once you have added the starting and ending points, click on "Go" button and you will get the route details.
- Also, you can select the time at which the generated route is going to be used by you. It can be Leave now, Leave at and Arrive by. For these options, you need to select date and time.
- For all the waypoints added in the route, each way point can be dragged to reorder their position in the route.



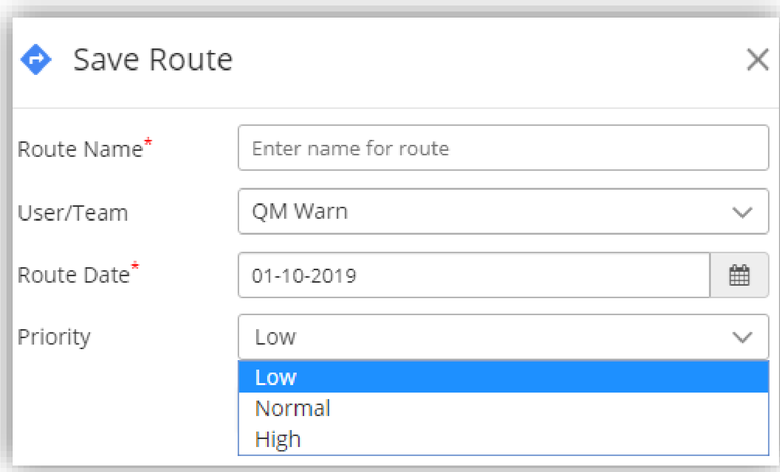
- It will list all possible route and highlight the optimized route. Also, you can get directions based on means of transport like driving, walking and transit.

- You can also apply various filters on route by clicking on "Options" dropdown. Various filters related to Distance are: Miles/KM, Directions: Shortest time/Shortest Distance, Avoid Highways, Avoid Tolls, Avoid Ferries and 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.



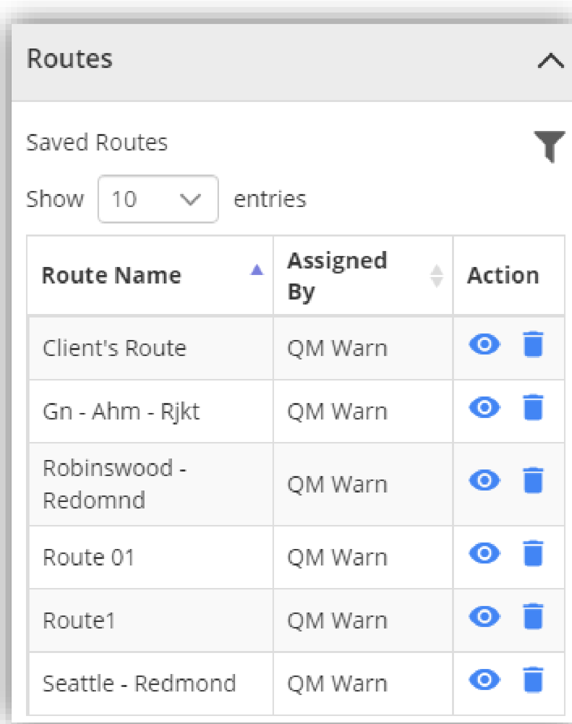
- Also, particular route can be saved for future reference. To save route, click on the save icon available on the top of the pop-up. It opens a dialog box where you need to provide name to the route and user/team name to whom the route is being assigned. Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.



- You can also share route in email using link.

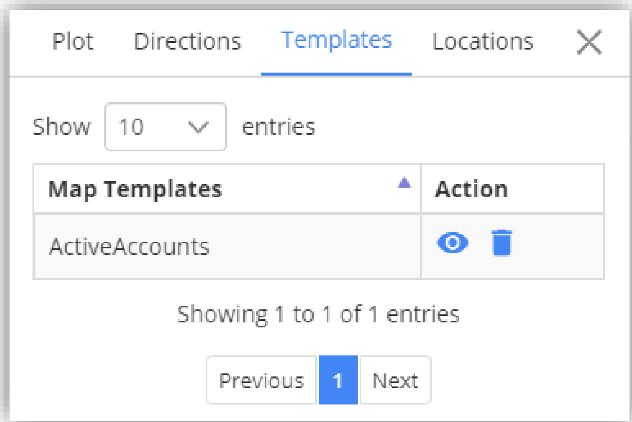
Route

- Under route section, you can view all saved routes. Also, actions such as preview and delete can be performed for a route.
- Routes can also be filtered based on Start date and End date.



Templates

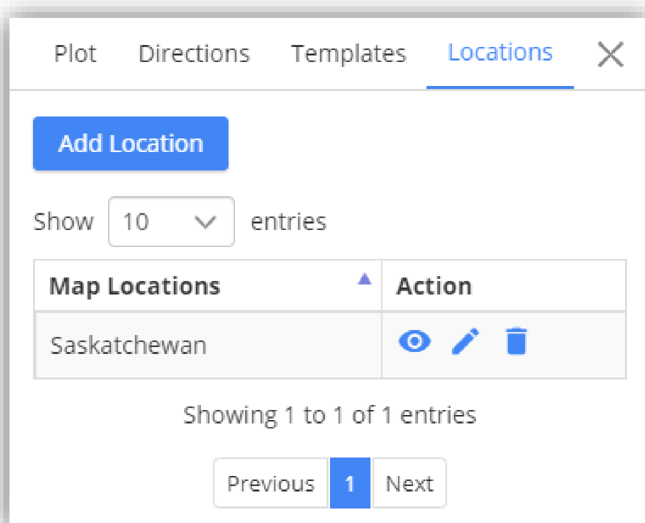
- Templates feature helps you save map configurations so that you can come back to them later and tweak them according to requirement.
- Under Templates section, logged in users can see all the templates created by them or the templates that are made public.
- For the list of templates shown, the templates can be previewed or deleted.



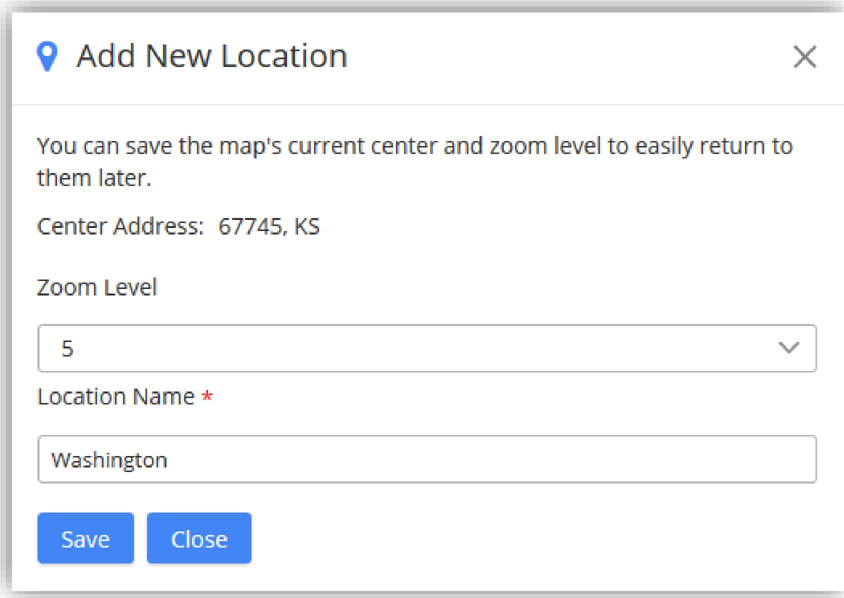
Note: If template is not public, only admin and the user who created that template will be able to view it.

Locations

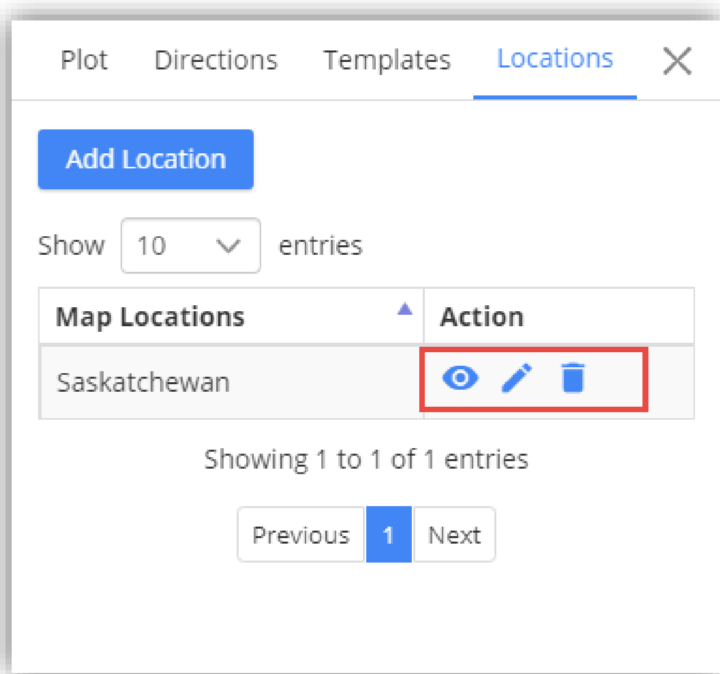
- In locations user can save particular location, so that later they can come back when required.
- For adding location, navigate to Locations tab.



- Click on **"Add Location"** button to add new location.



- Select zoom level and enter location name and click on **"Save"** button to add location.



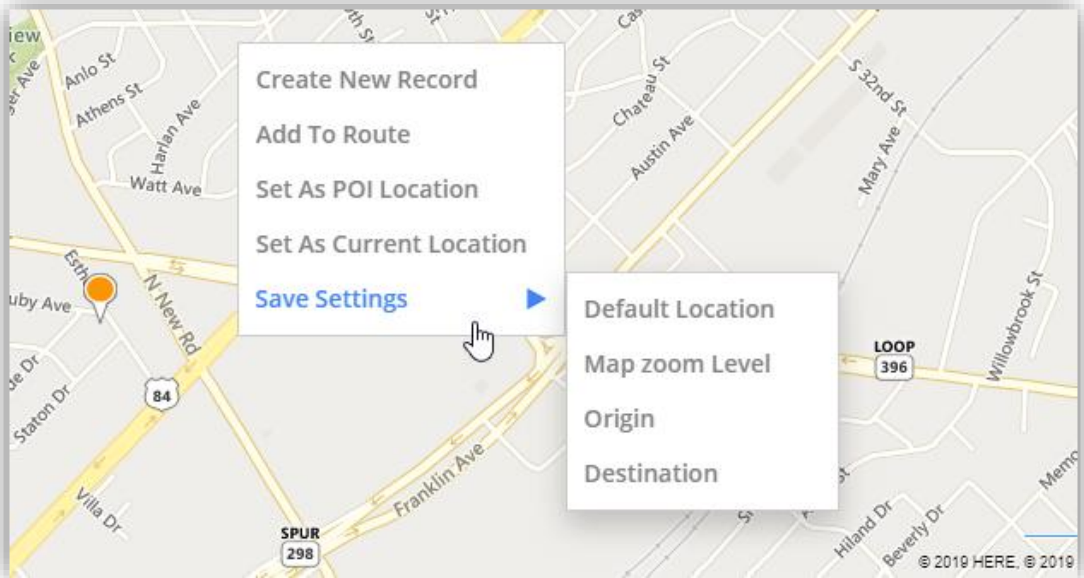
- You can also view, edit or delete location from action tab in location listing.

- By clicking on locate me icon, you can know your current location.

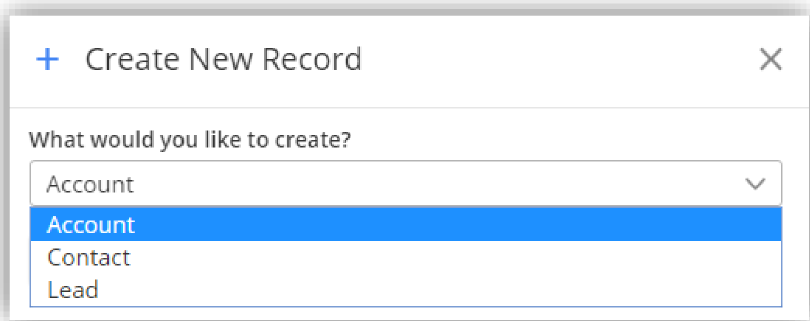
Contextual Menu

- Right click on to map to open Contextual Menu. It provides options like creating new record, Add to route, Set as POI Location, and Set as Current Location. Also, for logged in user, default settings like default location, map zoom level, origin and destination can be managed by selecting save settings.

- These settings directly get saved under Quick Maps Configuration record for particular user.

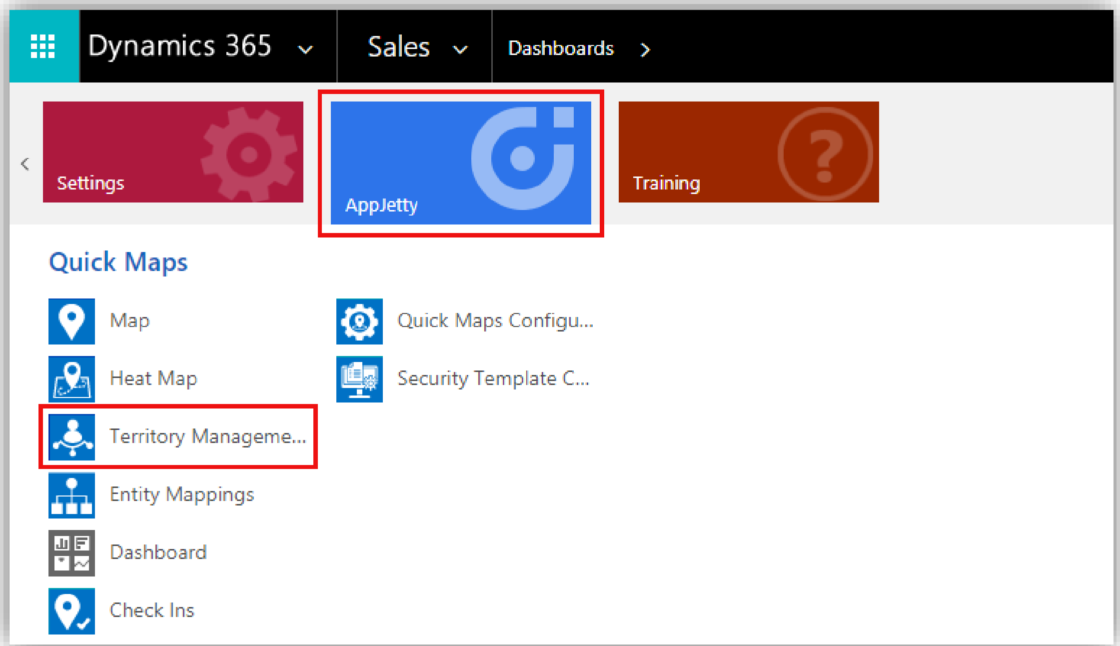


- Selecting create new record option, opens a dialog box to select record type. It can be Account, Contact or Lead. Upon selection of the option, you are redirected to particular entity page of record creation.

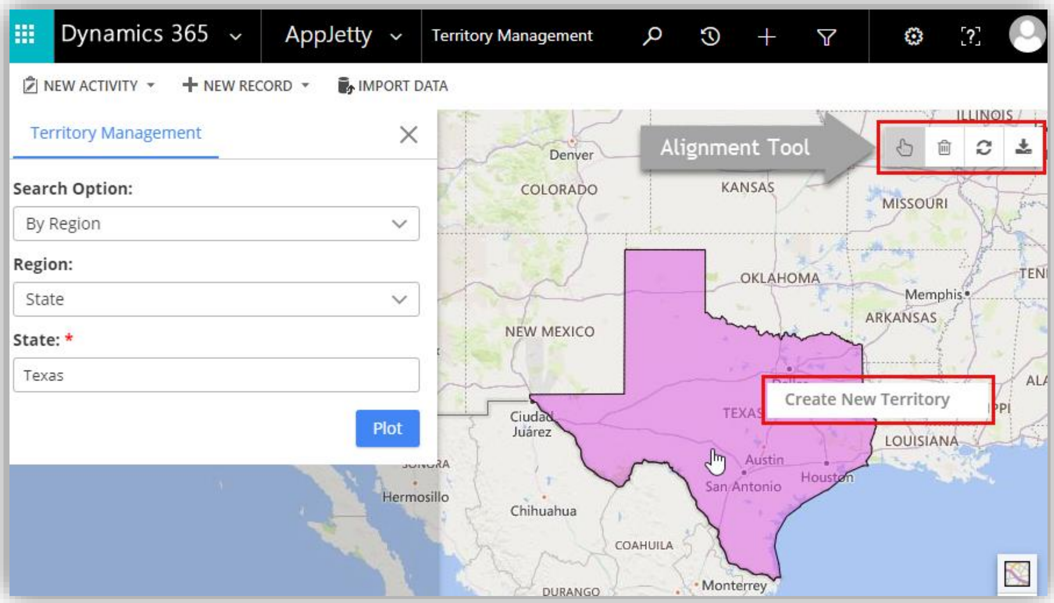


Territory Management

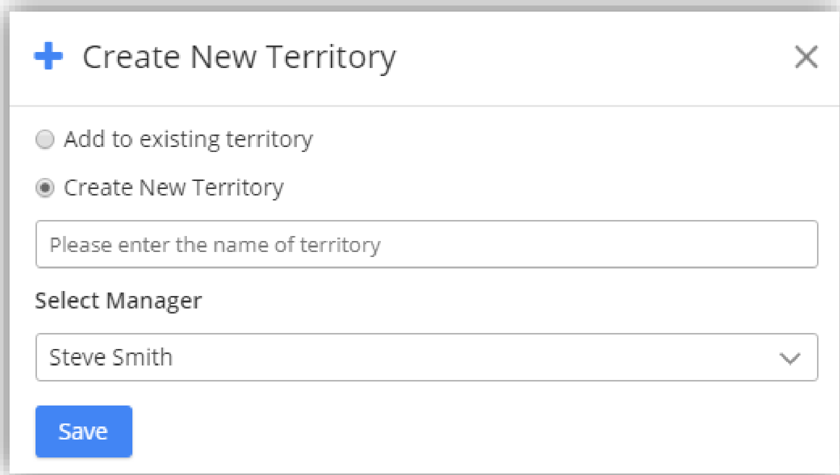
- Using territory management, you can create new territories or manage existing territories directly from the map itself. You can plot regions on map based on files, by location of regions, and by drawing. Based on plotted regions, you can use the Alignment tool to select the required regions and create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



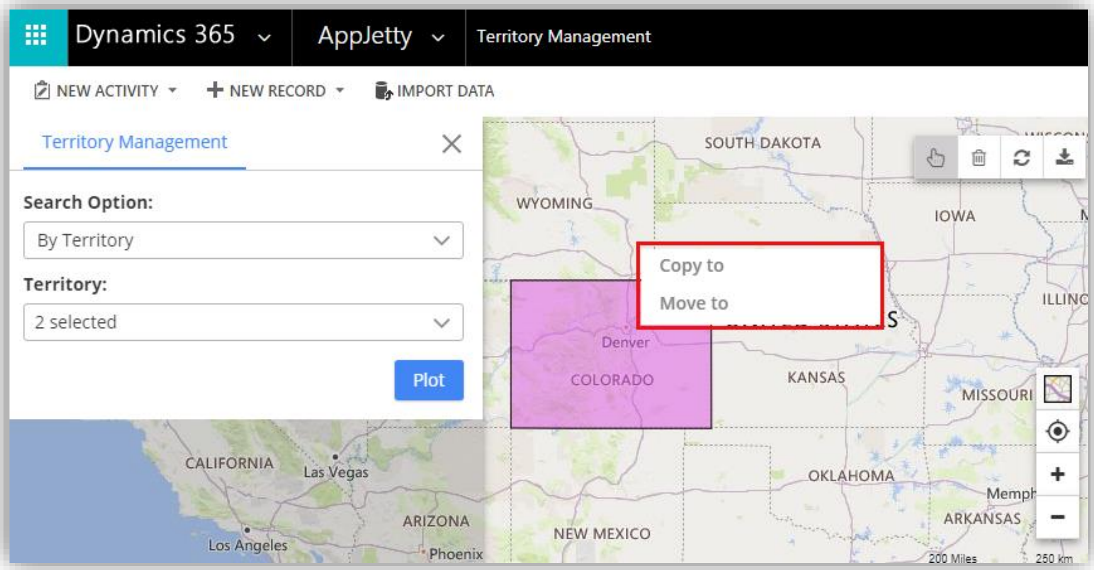
- To perform territory management, navigate to **AppJetty -> Quick Maps -> Territory Management**.
- Different search options available are By Region, By Drawing, By Territory, By File.
- By Region: This option helps users to search for regions on the map i.e. City, State, Country and Postal Code.
- By Drawing: This lets you draw a shape using custom drawing tool.
- 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



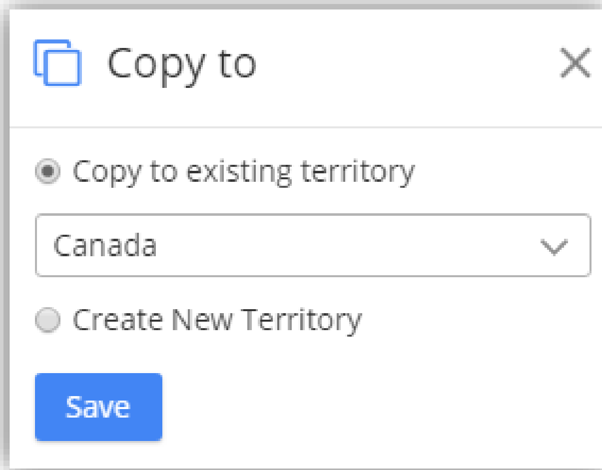
- **Create New Territory**: Select region/shape and right clicking on selected region, it would show option to create new territory.

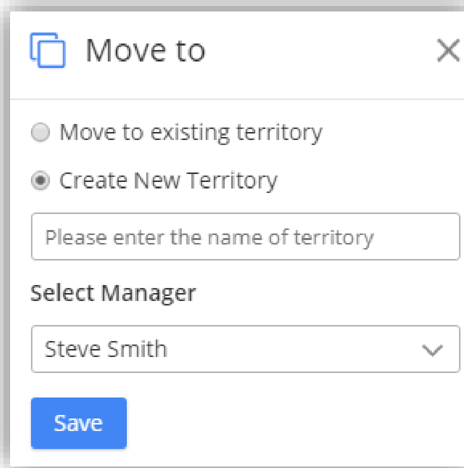


- Clicking on **Create New Territory** would open a dialog box to enter territory name and select manager for a territory. User can also choose to add the new territory within existing territory by selecting **Add to existing territory** option.



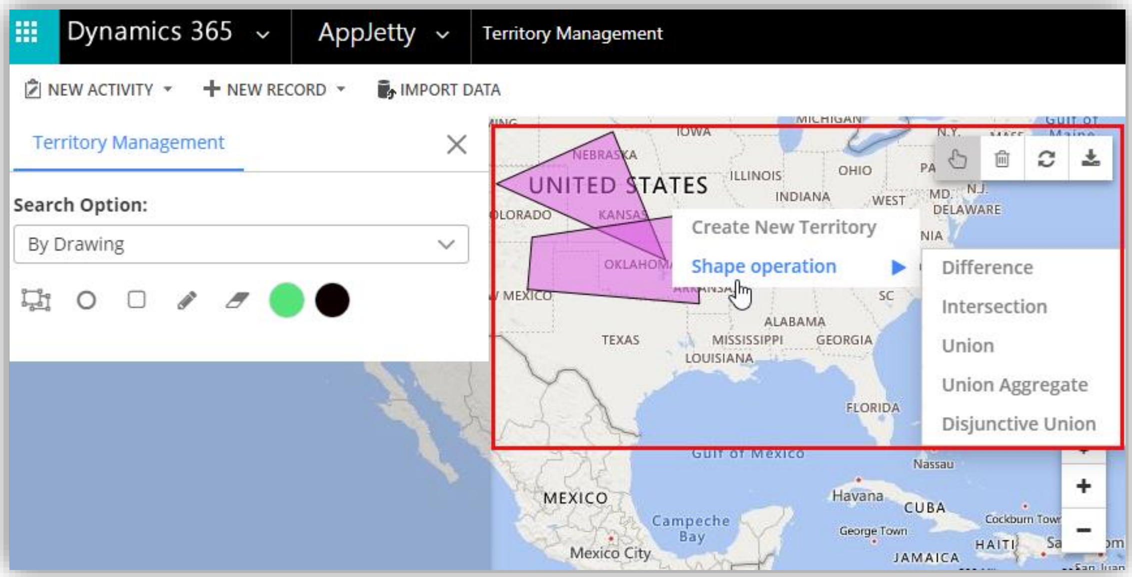
- **Copy/Move Territory:** Right clicking on selected region/shape that is an existing territory, it would show option to copy or move territory.





- 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.

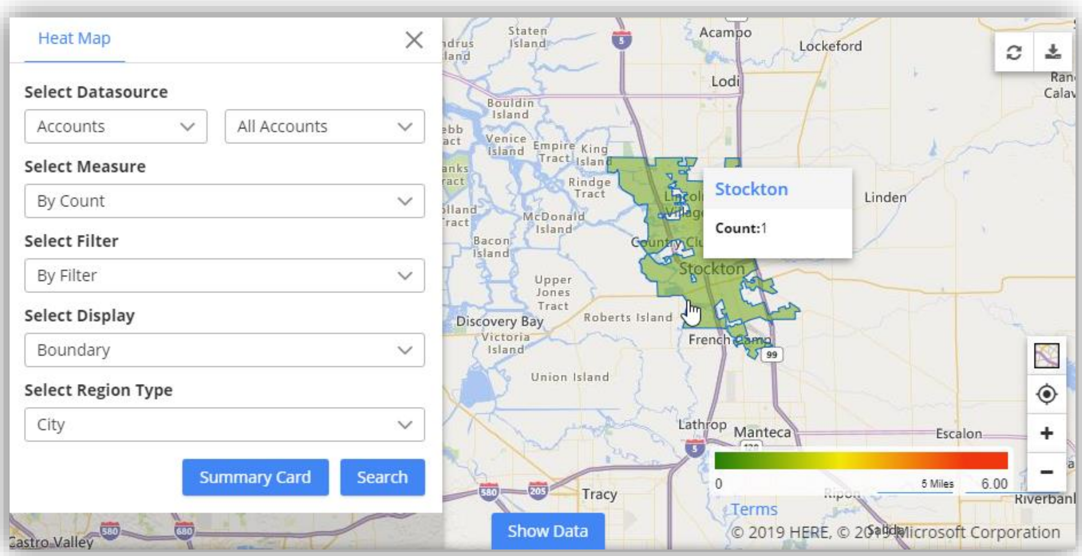


Note:

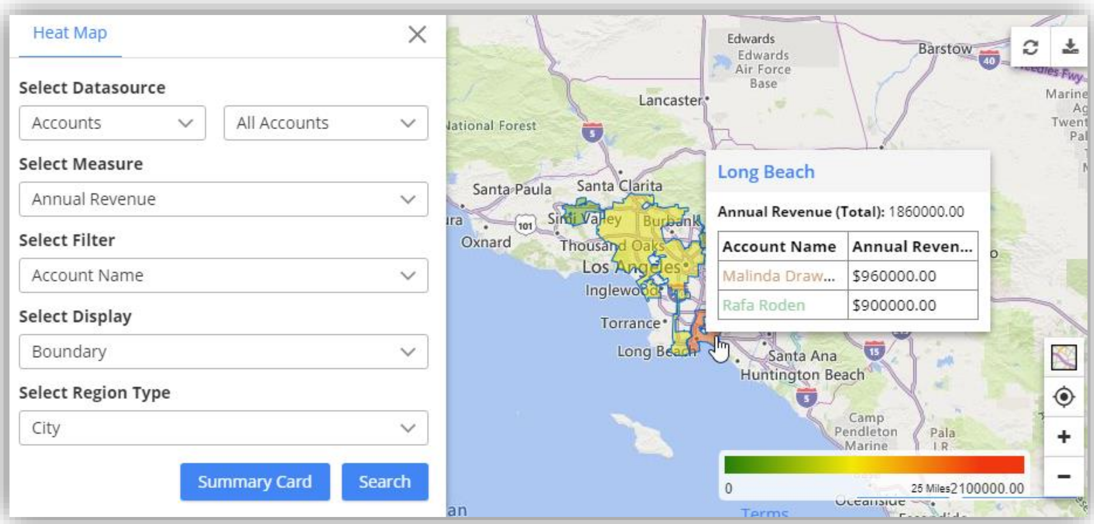
1. Shapes should overlap each other for performing shape operations. In order to perform binary operation, shapes should be selected.
2. Move To/Copy To works on shapes of plotted territories.

Heat Map

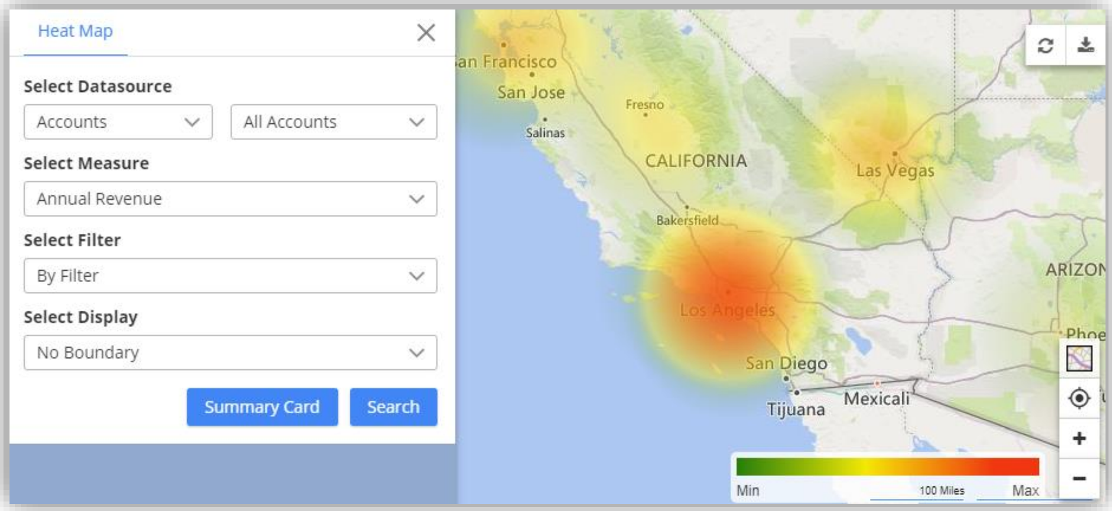
- Navigate to AppJetty tab and Select Heat Map.



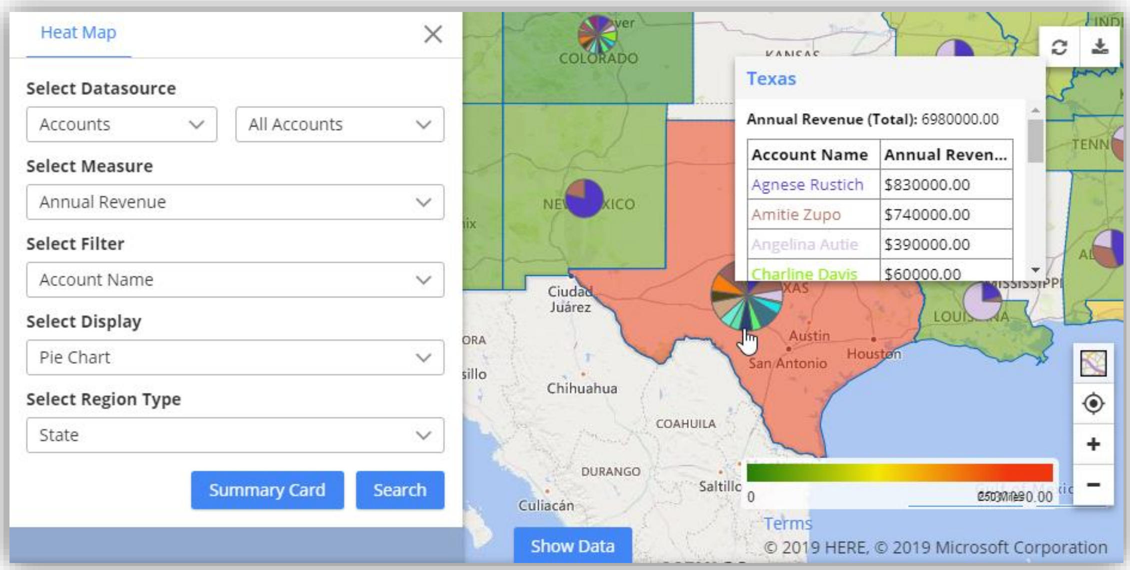
- It would open a map for you to select further map options. Here, it would list all those entities that are configured under Entity Mappings.
- Different options are:
- Select Data source: Choose entity and its view to analyze data.
- Select Measure: Select the aggregation method to be used to color 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 and filter.

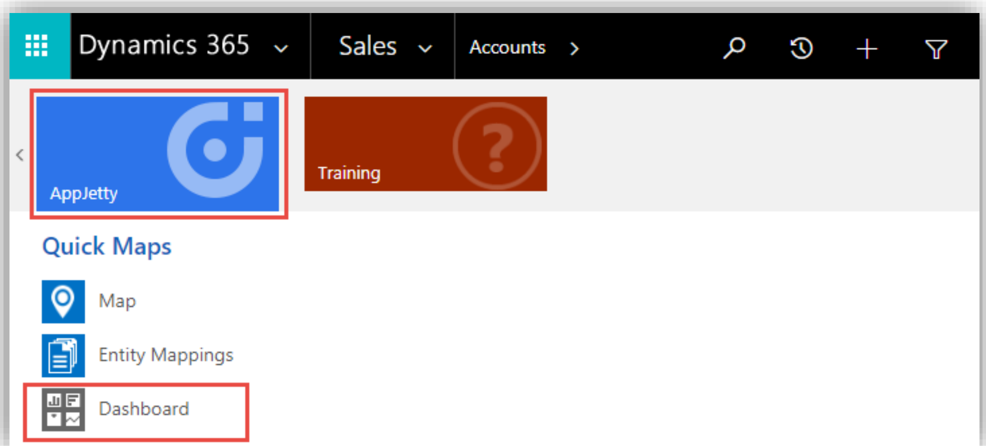


- Column Chart: View data in form of column charts based on attributes selected in measure and filter
- Select Region Type: Define geography level of aggregation. It can be any from the city, state, country and postal code.

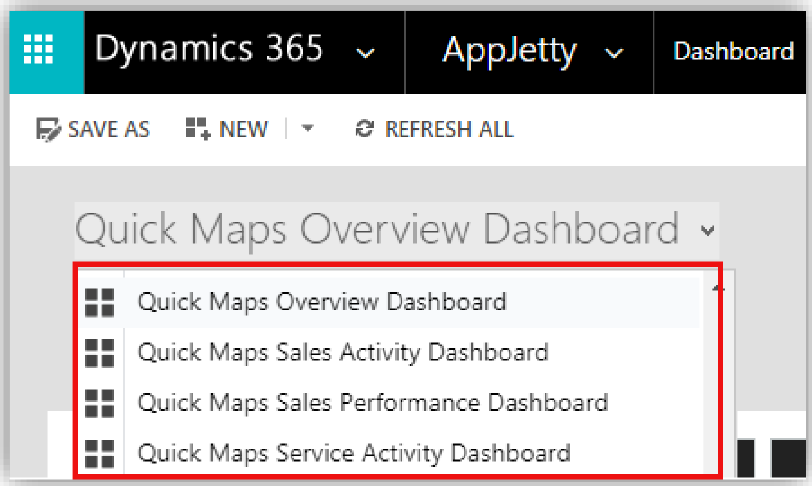
Note: On hover, it shows details of the boundary, pie chart or column chart attributes and clicking on particular highlighted region shows up the summarized information for the same.

Analytical Dashboard

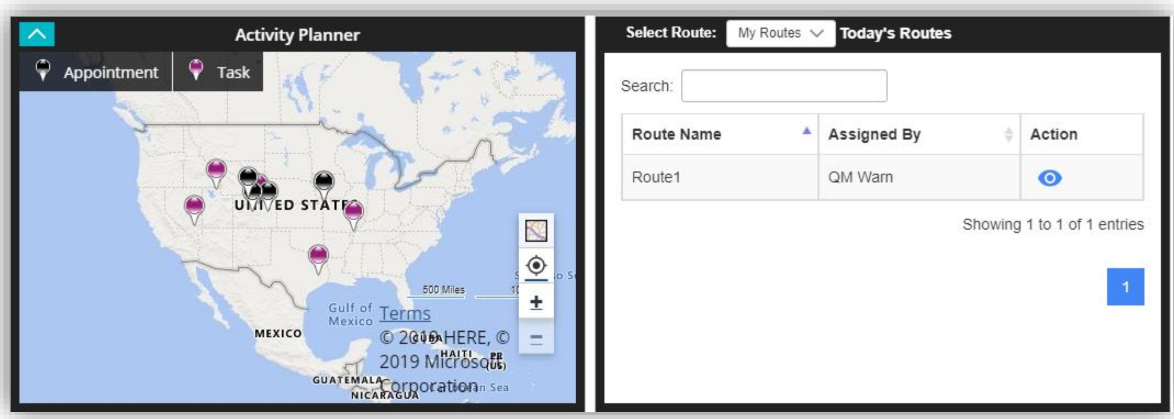
- To access dashboard, navigate to **AppJetty -> Quick Maps -> Dashboard**.



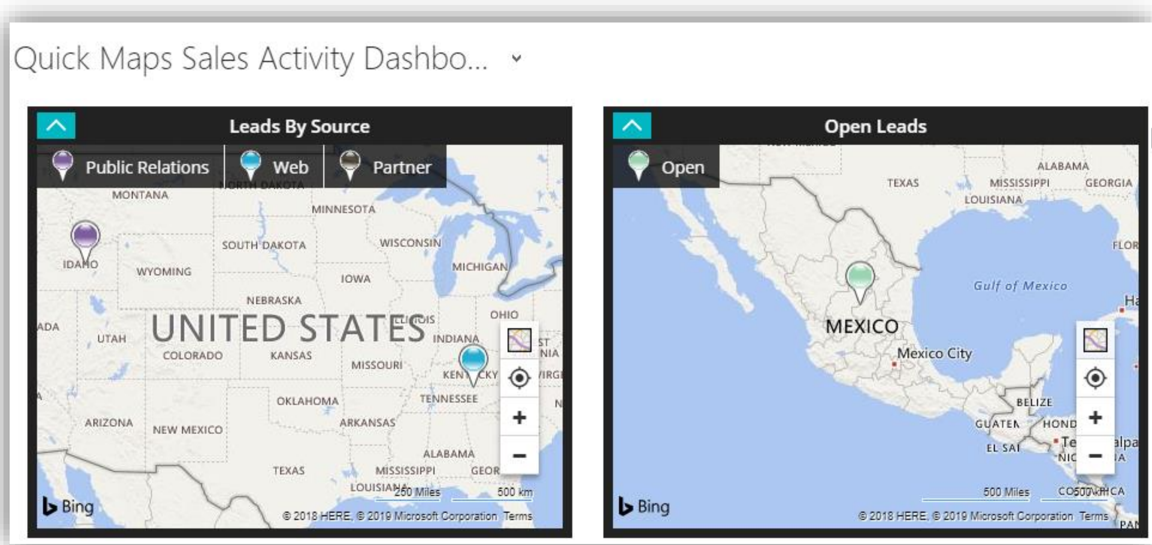
- There are four different dashboards available in the list for user to select from:

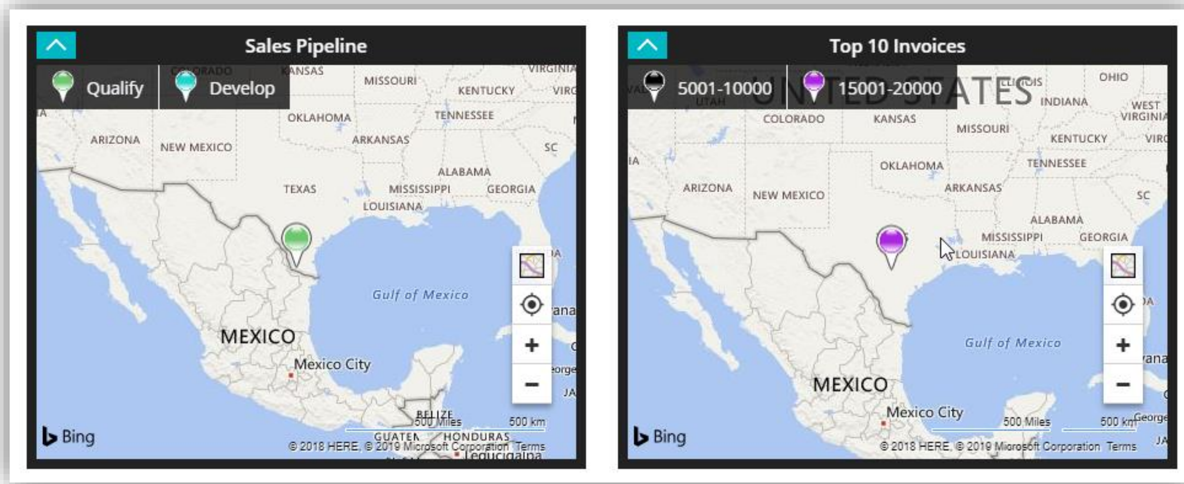


- Quick Maps Overview Dashboard

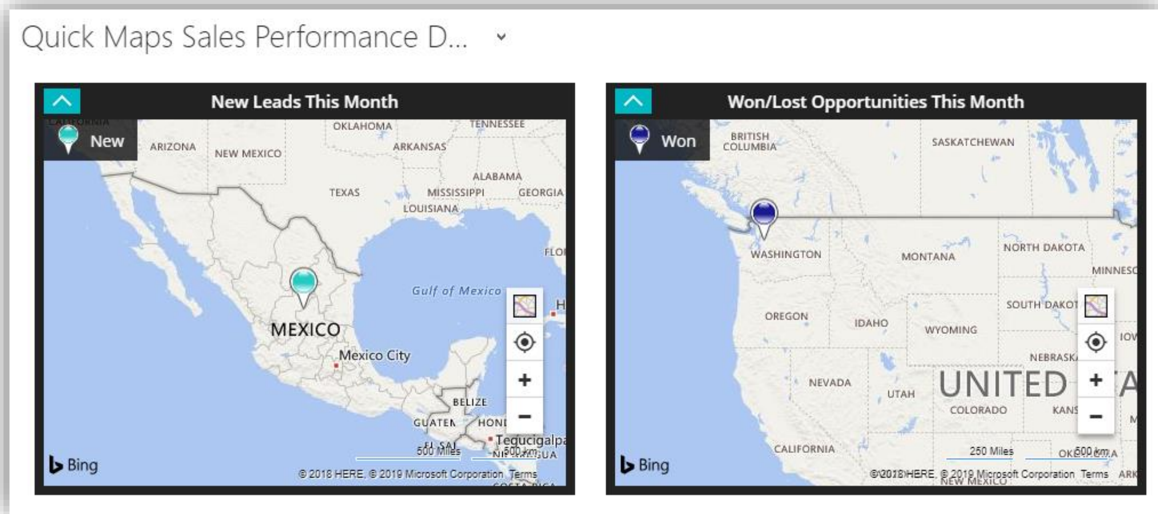


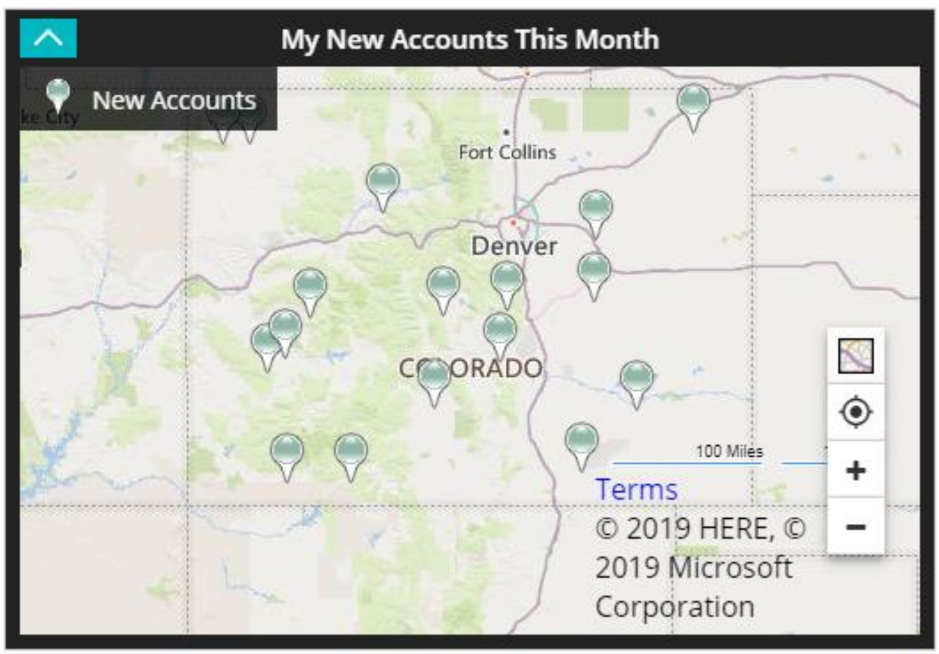
- **It includes following dashlets:**
  - **Activities Planner:** It displays activities like Task, Appointment, Service Activity of current month in map related to activities related to customer.
  - **Follow Up Cases by Priority:** It displays all the cases that are to be followed upon for the current day.
  - **Top 10 Opportunities:** It plots top 10 opportunities based on revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.
  - **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.
- Quick Maps Sales Activity Dashboard:





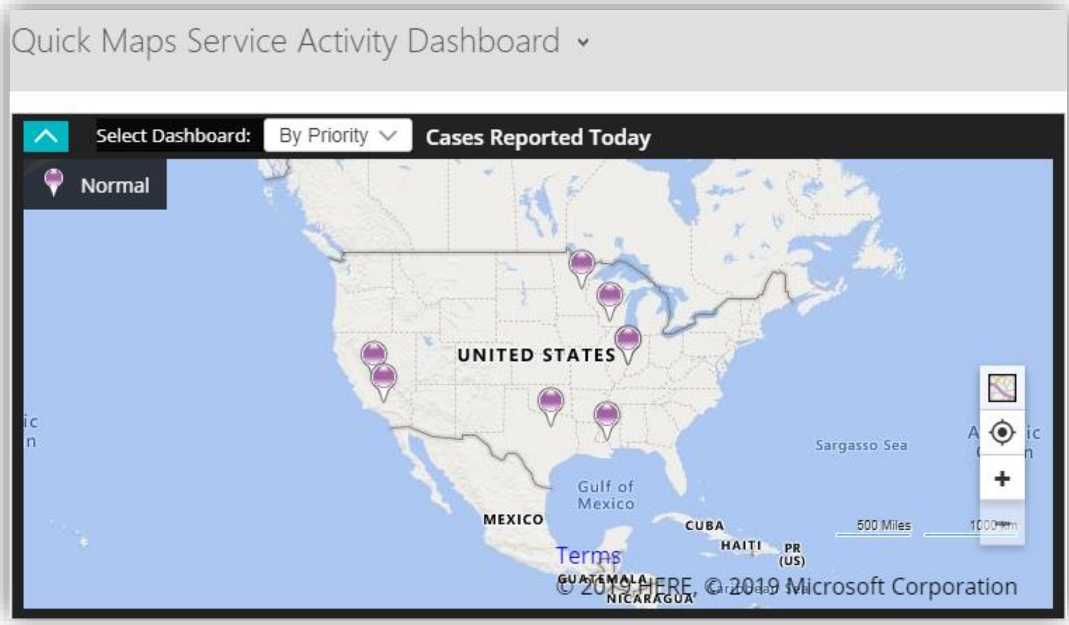
- **It includes following dashlets:**
    - **Leads by Source:** It will display all open leads based on their source creation. It can be an Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, Web, Word of Mouth and Other.
    - **Open leads:** It will 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 Open Invoices:** It will display Top 10 Invoices with respect to total amount of the invoice.
- Quick Maps Sales Performance Dashboard





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

- Quick Maps Service Activity Dashboard:



- **It includes following dashlets:**

  - **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.

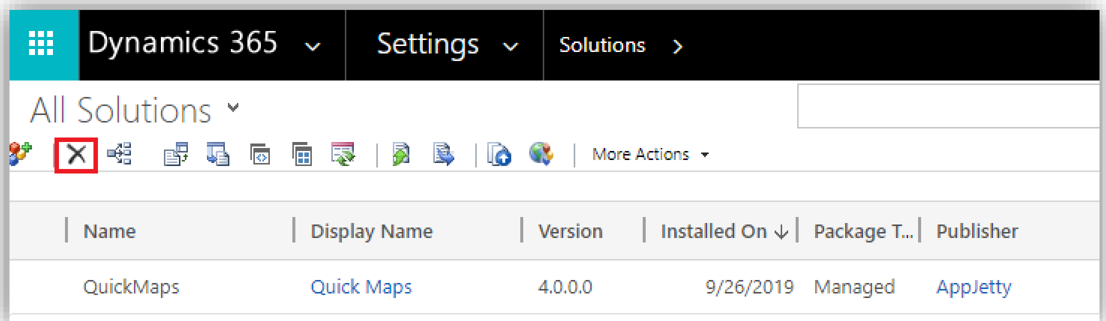
  - **Cases Resolved Today:** This dashlet would show all the cases resolved on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.

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.

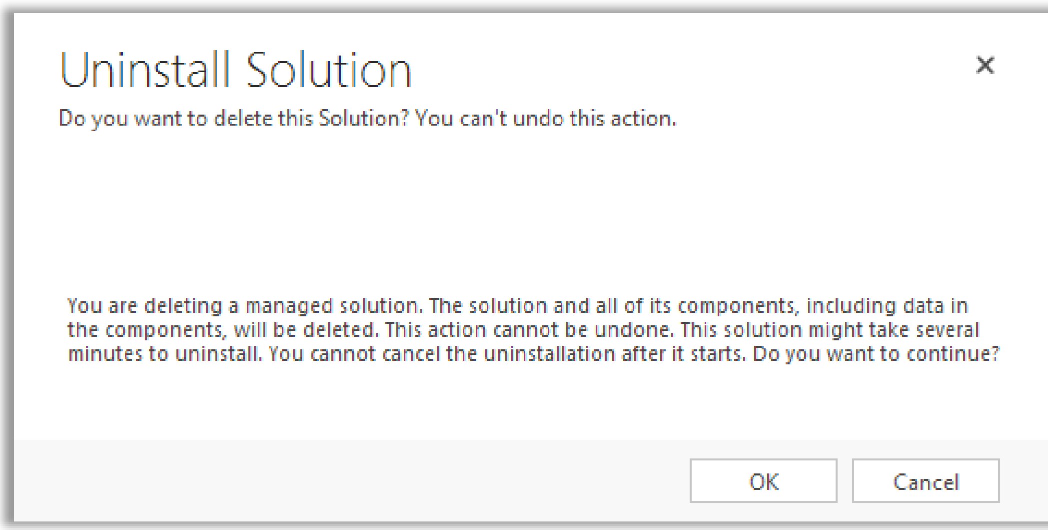
Uninstallation Steps

- 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.



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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/dynamicscrm-quick-maps.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 or you can login to your account @ 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 Quick Maps**, please write to sales@appjetty.com