



Maptaskr

Installation and Configuration Guide

Version: 2.0.0.0

Registration

1. Import Maptaskr to the Solution store by navigating to Settings -> Solution or from the AppSource
2. Once installed, click on the Maptaskr solution within the Solutions page
3. Click on 'Configuration' in the left navigation

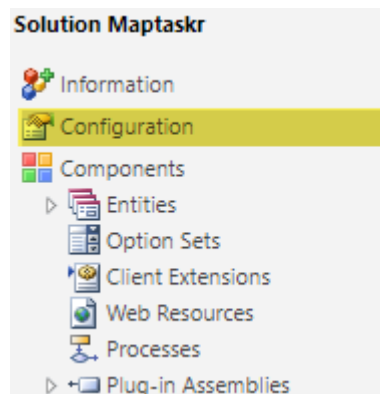


Figure 1: Configuration

4. Fill in the Registration details, select the Terms & Conditions and click the 'Register Trial' button. You will receive the license key in your email provided.

Registration

First Name *

Last Name*

Email Address*

Contact Number*

Company Name*

Country*

☐ I have read and accept the Terms of Service *

☐ Keep me updated with news and product updates

Register Trial

Figure 2: Registration

- Once you received the license key in your inbox, copy and paste the license and click 'Activate'

License

Enter the license key to activate or update the license key:

License Key

License Key

Activate

License Information
License Status
Licensed Users
License Started
License Expires

Figure 3: License Activation

Upon license activation, the license details are reflected:

License

Users

Advanced

Data Tab Action

Enter the license key to activate or update the license key:

License Key

License Key

Activate

License Information	
License Status	Active
Licensed Users	6
License Started	Mon, Mar 11, 2019
License Expires	Wed, Mar 25, 2020

Figure 4: License Details

License

Click on the 'Users' tab and click on the 'Assign License' button

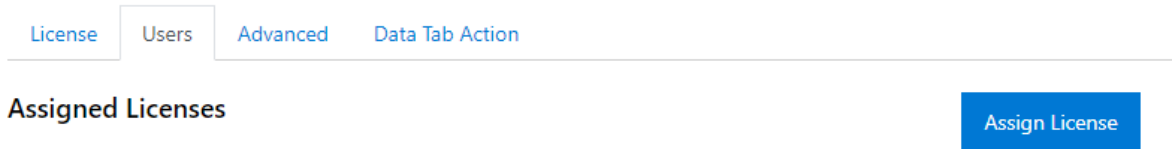


Figure 7: Assign License

6. Assign Maptaskr license type to user or group

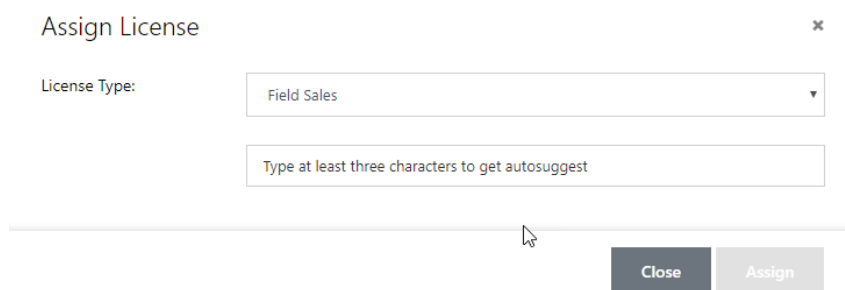


Figure 8: License Assignment

Advanced Settings

Additional options can be set in the Advanced tab.

Under **Advanced Settings** -

- a. Base Map: Select a different Base Map
- b. Base Map Type: Select a Base Map type
- c. Base Map Key: Insert Bing Map Key
Note: temporary Bing Map key is provided in the solution which may have expired.
New Bing Map key can be acquired from the [Bing Maps Portal](#) for test or production purposes.
- d. Change Geocoding type: Bing is used as default Geocoding service, to change to Google, select Google and enter Google map key.
Google Maps key can be acquired from the [Google Maps Platform](#). The key needs to include Geocoding API enabled.
- e. Default View: Select a default view of the map.
- f. Distance: Select distance type.

Under **Map Settings** -

- Display Pin's Label: Choose Yes/No
- Load Default Query: Choose Yes/No
- Load Custom Icon: Choose Yes/No
Note: on selection of No, user will get colour picker option instead of icons.
- Cluster Level: Put a number
Note: level to determine how close the cluster will be showing.

Under **Search Settings** -

- Default Set Location Within: Put a number
- Show Quick Search: Choose Yes/No
- Show Annotations Tab: Choose Yes/No
- Show Library Tab: Choose Yes/No

[License](#)
[Users](#)
[Advanced](#)
[Data Tab Action](#)

Advanced Settings

Base Map Bing	Default View Map	Geocoding Bing	Distance Miles
Bing Map Type Light	Bing Maps Key Key		

Search Settings

Default Location Within 90	Cluster Level 50	Default Tab Selection Select Tab	<input checked="" type="checkbox"/> Display Pin's Label
<input type="checkbox"/> Load Default Query	<input checked="" type="checkbox"/> Enable Quick Search	<input checked="" type="checkbox"/> Enable Region	<input checked="" type="checkbox"/> Enable Annotations Tab
<input type="checkbox"/> Load Custom Icon	<input checked="" type="checkbox"/> Enable Territory	<input checked="" type="checkbox"/> Enable Draw	<input checked="" type="checkbox"/> Enable Library Tab

Figure 9: Base Map Settings

Data Tab Actions:

Maptaskr displays data in map and data table format. The actions in the data tab include the ability to take mass actions. The actions can be turned on/off.

License Configuration Users Advanced Data Tab Action	
Data Tab Actions	
Action	Active
Add to Route	<input checked="" type="checkbox"/>
Change Owner	<input checked="" type="checkbox"/>
Add to Marketing List	<input checked="" type="checkbox"/>
Export to Excel	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>
Export to Excel	<input type="checkbox"/>
Create Activities	<input type="checkbox"/>
Execute Workflow	<input type="checkbox"/>

Figure 10: Data Tab Actions

Additional Configurations

Maptaskr comes with some default configurations which can be altered or added, if required. Entities displayed on the map, include properties and actions are configurable. Data Sources defines which entities are searchable and viewable in Maptaskr.

Data Sources

Upon installation and configuring Maptaskr, Accounts, Contacts and Leads entities are mapped by default. To add additional entities, please follow steps as described below.

1. Navigate to Settings ➔ Maptaskr ➔ Data Sources

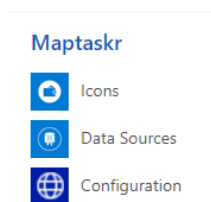


Figure 11: Maptaskr settings menu items

2. To add a new entity, click on NEW and fill the required field mappings. As you start typing autosuggest will show suggestions.

MAPTASKR DATA SOURCE : INFORMATION

New Maptaskr Data source ☰

◀ General

Entity Name *

Display Name *

Title Field Name *

Has Address? *

Is Address Required *

Address Composite Field Name

Street1 Field Name +

Street2 Field Name +

Street3 Field Name +

City Field Name +

State Field Name +

da

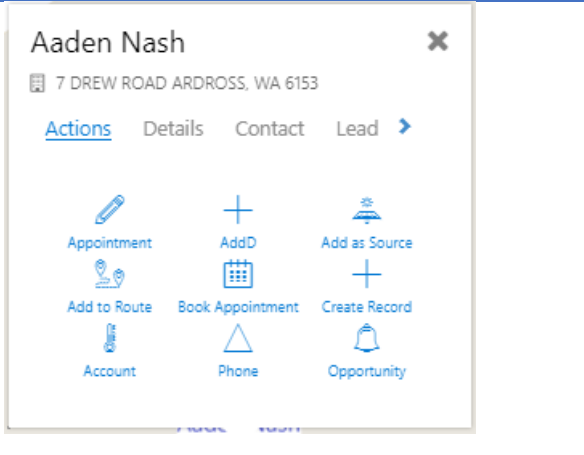
- entitydataprovder
- appmodulemetadatadependency
- importdata
- appmodulemetadata
- leadaddress
- msdyn_odatav4ds
- unresolvedaddress

36 results

Figure 12: Data source – autosuggestion

The following table list the attributes for data source:

Field	Description
Entity Name	Internal name of the entity.
Display Name	The name which will be displayed in Maptaskr
Title Field Name	When the entity will be displayed in infobox, the field value will be displayed (highlighted below)

	
Has Address	<p>If the entity doesn't have an address field select yes. If yes then you need to specify a related entity which has address field. For example, you want to search appointments based on contact's location – so you would select 'Has Address' false and in '</p>
Related Entity with address	<p>If the entity doesn't have address then a related entity with address required. For example, you add a data source for appointment which doesn't have address but 'related entity with address' might be 'contact' which has address.</p>
Is Address Required	<p>If yes you need to provide address fields mapping, otherwise just longitude and latitude field required for address mapping</p>
Enabled	<p>Whether the data source is enabled or disabled</p>
Show on Dashboard	<p>Whether the entity will appear in searchable entity dropdown.</p>
Allow Relationship	<p>If yes then the data source will appear in the relationship list tab in other entities</p>

Relationship List

When an entity is displayed in Maptaskr, related entities can be accessed as well, if mapped in the 'Relation List'. The related entities can be shown as list or can be mapped based on the option selection

Infobox Actions

Actions available in Infobox is customisable. You can create new action as well as edit default actions.

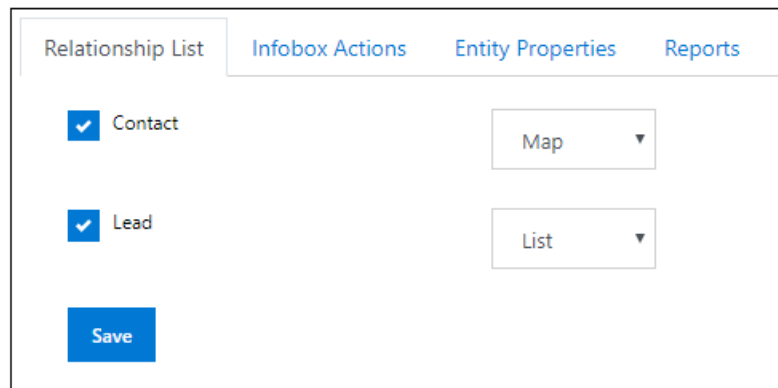


Figure 13: Data source – Relationship list

Entity Properties

Entity properties are the fields visible in detail section of One Click actions. The properties can be specific to entities.

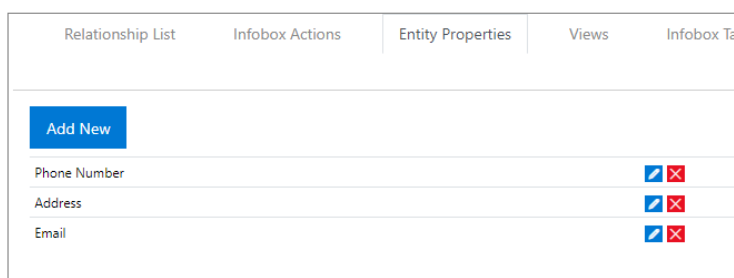
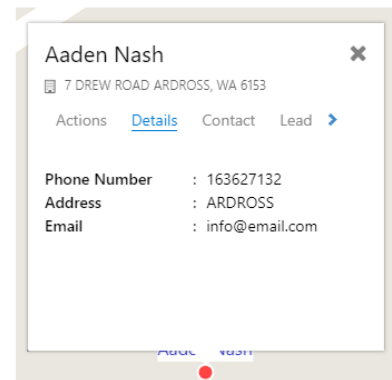



Figure 12: Data source – Entity Properties

1. To create a property, click the “Add New” button and fill in the details

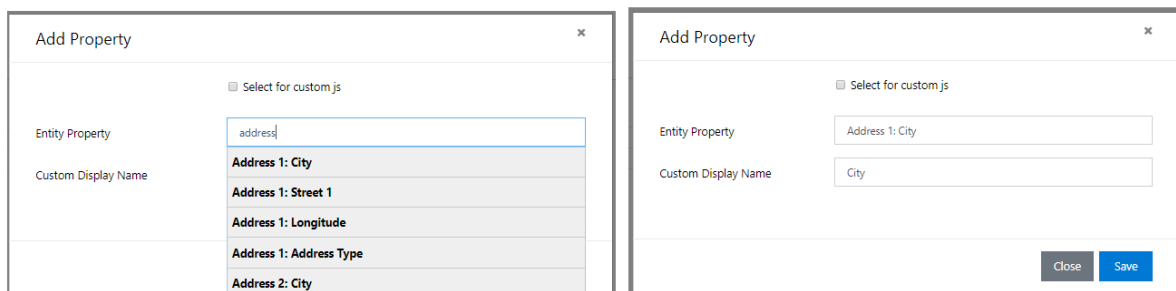


Figure 13: Add Entity Properties

2. Once added, click on the “Save” button.
3. To edit/delete the action, click on the buttons next to the property.
4. If a property is Boolean type, icon can be displayed instead of property value.

Views

To control what views are available for users, enable the required view and applicable security group.

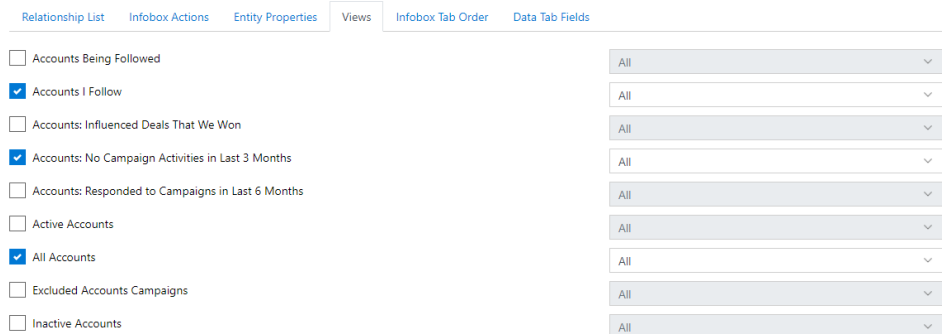
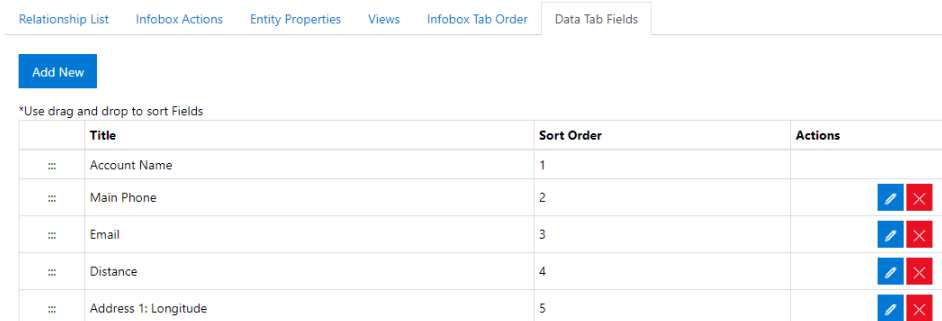


Figure 14: Views

Data Tab Fields

Data Tab includes fields visible in data tab in the Maptaskr search section. The fields are specific to the data source.











Title	Sort Order	Actions
Account Name	1	
Main Phone	2	 
Email	3	 
Distance	4	 
Address 1: Longitude	5	 

Figure 15: Data Tab Fields

Icons

Maptaskr includes default Icons for displaying entities and attributes on the map. They are categorised into:

1. **Push Pins:** used in search selection and results. Search selection is available under 'Search' in the left navigation bar.

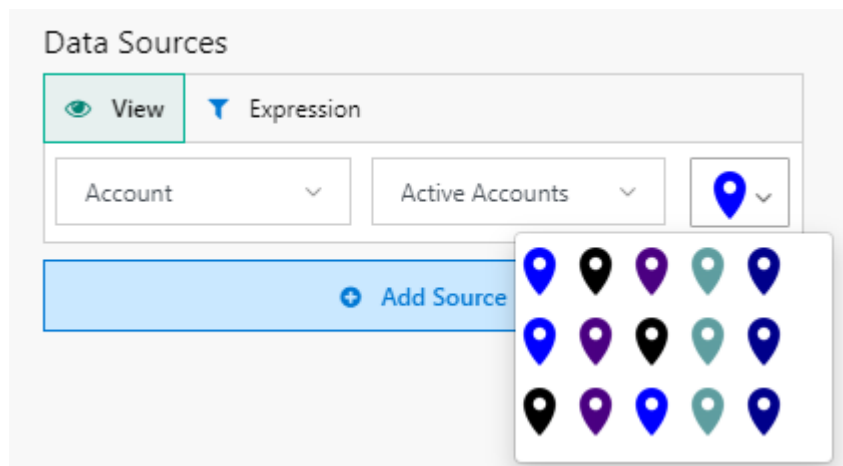


Figure 14: Push Pins

2. **Entity Properties:** are icons that can be assigned to Boolean properties and are displayed as icons with 'One Click' actions. Below screen shows the icons for the property set with the Data Source. (Refer to Data Sources -> Entity Properties)

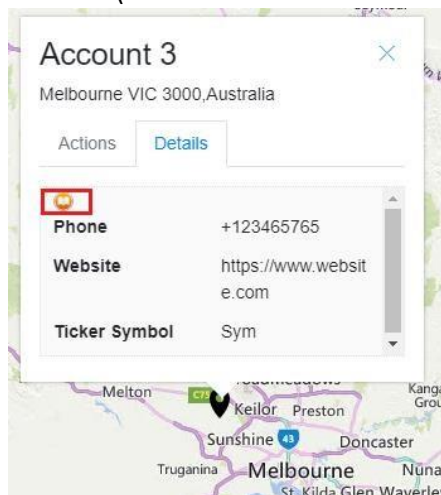


Figure 15: Entity Properties Icon

3. **Object Library:** used for annotations. Object Library is available under 'Annotations' in the left navigation bar.

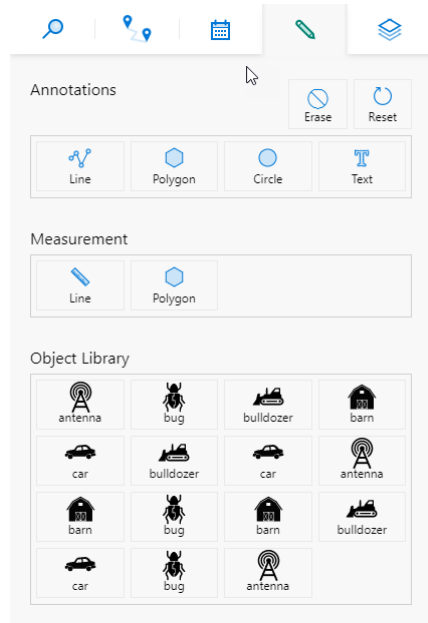


Figure 16: Object Library

Custom icons can be added to Maptaskr to indicate the above types.

1. Navigate to 'Settings' -> 'Maptaskr Icons'
2. Click on 'New' in the ribbon
3. Enter Name, Icon Type (Push Pin, Object Library or Entity Property)
4. Save the record
5. Click on the Notes field
6. Click on the Attach button and upload an image representing the icon type.

MATASKR ICON : INFORMATION

New Mataskr Icon

General

Name * icon1

Icon Type * Push Pin

Owner * Entity Property

Note Text

NOTES

Figure 17: Maptaskr Icons

Geocoding

Maptaskr supports Bing Maps and Google Maps for geocoding. Bing is used as default and can be changed to Google in Maptaskr settings (refer to the Installation section above).

Geocoding is triggered automatically for Accounts, Contacts and Leads. Any time a record is created or edited, Maptaskr validates and geocodes the address.

To run geocoding on existing addresses, navigate to the Entity, select one or more records, click on 'More Commands' and 'Run Workflow'

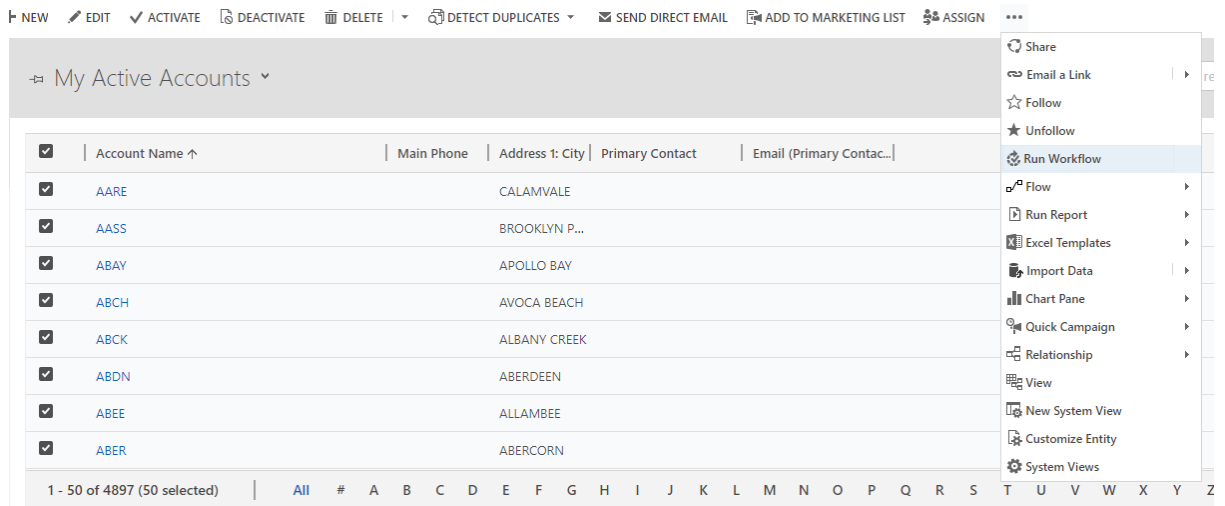


Figure 28: Geocoding - Run Workflow

Select the 'Maptaskr Geocoder' workflow if not selected and click on the Add button to the run the geocoding on the records.

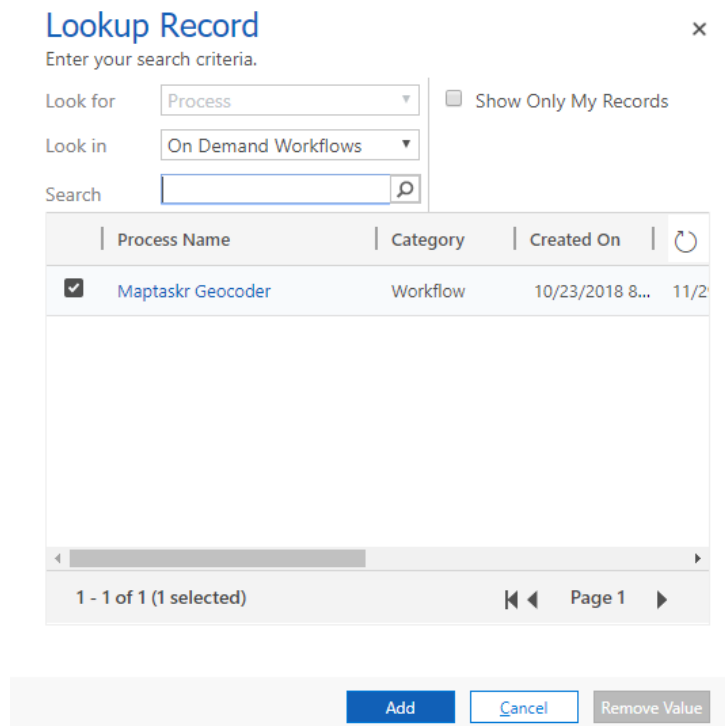


Figure 19: Geocoding Workflow

Geocoding Custom Entities

Maptaskr Geocoding workflow that can be used for additional/custom entities.

Follow the below steps to configure Custom Entities:

- a. Create a new Workflow Process:

Navigate to → Settings → Processes and click on the New button or by creating a new empty Solution and then navigating to Processes.

- b. Enter the process name, select category as Workflow, and select the Entity you wish to design workflow and click OK.

Create Process

Define a new process, or create one from an existing template. You can create four kinds of processes: business process flows, actions, dialogs, and workflows.

Process name: *

Geocode Locations

Category: *

Workflow

Entity: *

Locations

☒ Run this workflow in the background (recommended)

Type:

☒ New blank process

☐ New process from an existing template (select from list):

Template Name ↑

Primary Entity

Owner

Properties

OK

Cancel

Figure 3: Create Process

- c. Set the Properties:

Set the Scope as an organization and in Start when: select “Record is created” and “Record fields change”

For the “Record fields change” option, select all of the address fields that require geocoding when any of the address fields are changed:

Click on Add Step and select the Maptaskr.Plugins (1.0.0.0) → Maptaskr.Plugins.GecodeActivity

The screenshot shows the 'Add Step' dropdown menu in the Power Automate interface. The menu is open, displaying a list of activities. The 'Maptaskr.Plugins (1.0.0.0)' activity is selected, and its sub-menu is open, showing two options: 'Maptaskr.Plugins.BulkWorkOrder' and 'Maptaskr.Plugins.GeocodeActivity'.

Activity Name	Sub-menu Item
Stop Workflow	
Microsoft.Dynamics.Service.Workflows.Entitle...	
Microsoft.Dynamics.Service.Workflows.Contr...	
Microsoft.Dynamics.Service.Workflows.Other	
Microsoft.Dynamics.Service.Workflows.Contr...	
Microsoft.Crm.ActionCardRankingActivity	
Maptaskr.Plugins (1.0.0.0)	Maptaskr.Plugins.BulkWorkOrder
Microsoft.Dynamics.Marketing.Workflows (9....	Maptaskr.Plugins.GeocodeActivity

Figure 4: Select Process

- d. Set the address parameter by clicking on Set Properties for the workflow and save and close the window.

Process: Geocode Locations

Set Custom Step Input Properties

Property Name	Data Type	Required	Value
Address Line 1	Single Line of Text	Optional	<input type="text"/>
Address Line 2	Single Line of Text	Optional	<input type="text"/>
Address Line 3	Single Line of Text	Optional	<input type="text"/>
City	Single Line of Text	Optional	<input type="text"/>
State/Province	Single Line of Text	Optional	<input type="text"/>
Zip/Postal Code	Single Line of Text	Optional	<input type="text"/>
Country	Single Line of Text	Optional	<input type="text"/>

Working on solution: Default Solution

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Set to

Look for:

Locations

Latitude

Add

X | ↑ ↓

Default value:

OK

Figure 5: Select Properties

- e. Click on Add Step and add Update Record.
- f. As per the entity that the workflow is being configured, click on Set Properties. Set the Latitude and Longitude to the output parameters returned by the workflow, save and close the window.

Process: Geocode Locations

Update Locations

General

Name

Owner

Latitude

Longitude

Additional Fields

Status

Form Assistant

Dynamic Values

Dynamic Values

Operator:

Look for:

Locations

Add

X | ↑ ↓

Figure 6: Set Outputs

Once the workflow is activated, the geocoding workflow will trigger on creation and update of address fields.