# Maplytics™ – Maps Integration with Dynamics 365 (CRM)

# Maplytics™ – Locational Intelligence Simplified

Allowing users gain geo-spatial insight to ease the business process execution. It uses the power of Bing Maps.

Available for CRM 2016 and above, Dynamics 365 Customer Engagement, Online, On-premises, Partner Hosted, IFD

**Bing** maps **+** Microsoft Dynamics 365

# KEY FEATURES

- Geocode Data
- Visualize Data on a Map
- Search by Region & Shape
- Sales Territory Management
- Proximity Search (Distance & Time)
- Concentric Proximity Search
- Save Map Templates
- Check-In/Check-Out
- Set Default Template
- Plot Related Records
- Shape Layer Integration

- Targeted Marketing Lists
- Appointment Planner
- Route Optimization & Sharing
- Truck Routing
- Along the Route Search
- Point of Interest (POI) Search
- Create new records from Map
- Analytical Map Dashboards
- Heat Map Visualization
- Customizable Color Scale
- Summary Card

- Customizable Pushpin icons
- Visualize categorized data
- Custom Tooltip Actions
- Mass Actions
- Auto Scheduling
- Pie & Column Chart in Heat Maps
- Security Access Template
- Overlay Layer Visualization
- Area of Service
- Show/Hide Layers
- Turn-by-turn Navigation

- PCF controls
- Sort and Filter Data
- Change Owner
- Multiple Territory
- Census Data visualization
- User Level Personalization
- Live Traffic
- Data Clustering
- Default Origin & Destination
- Batch Processing
- Shape Operations

*Supported Languages: English, German, French, Spanish, Portuguese, and Turkish*

Bing maps

Microsoft Dynamics 365 Certified

Microsoft
Dynamics Certified

Available on Microsoft AppSource

# MULTI-LANGUAGE COMPATIBILITY



- **Auto detects language set in your Dynamics 365/CRM**

- **Currently available for English, Spanish, German, French, Portuguese, and Turkish**

# GEOCODE DATA



**Maplytics**

Everest Nivara InfoTech Park,
MIDC Main Rd, Indira Nagar,
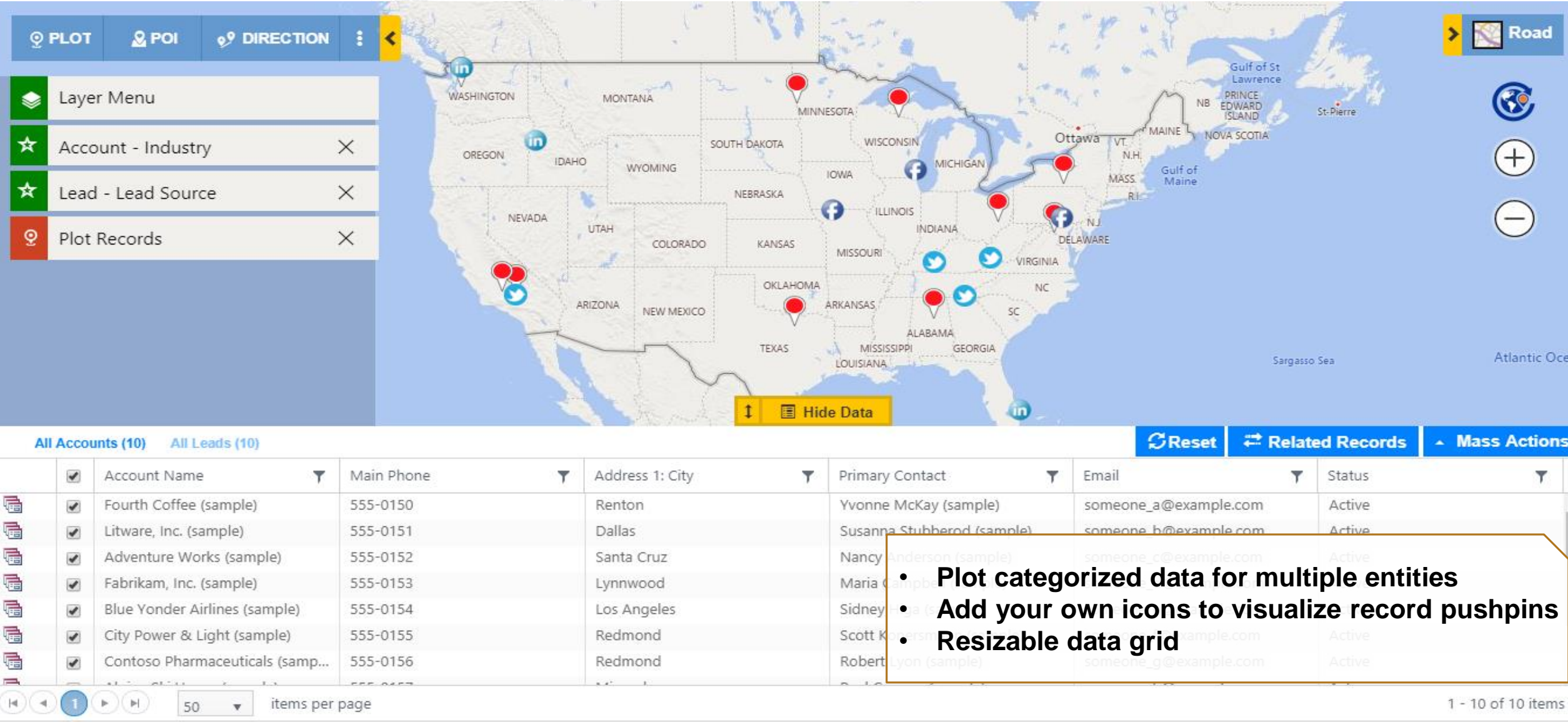Turbhe, Navi Mumbai,
Maharashtra-400705,
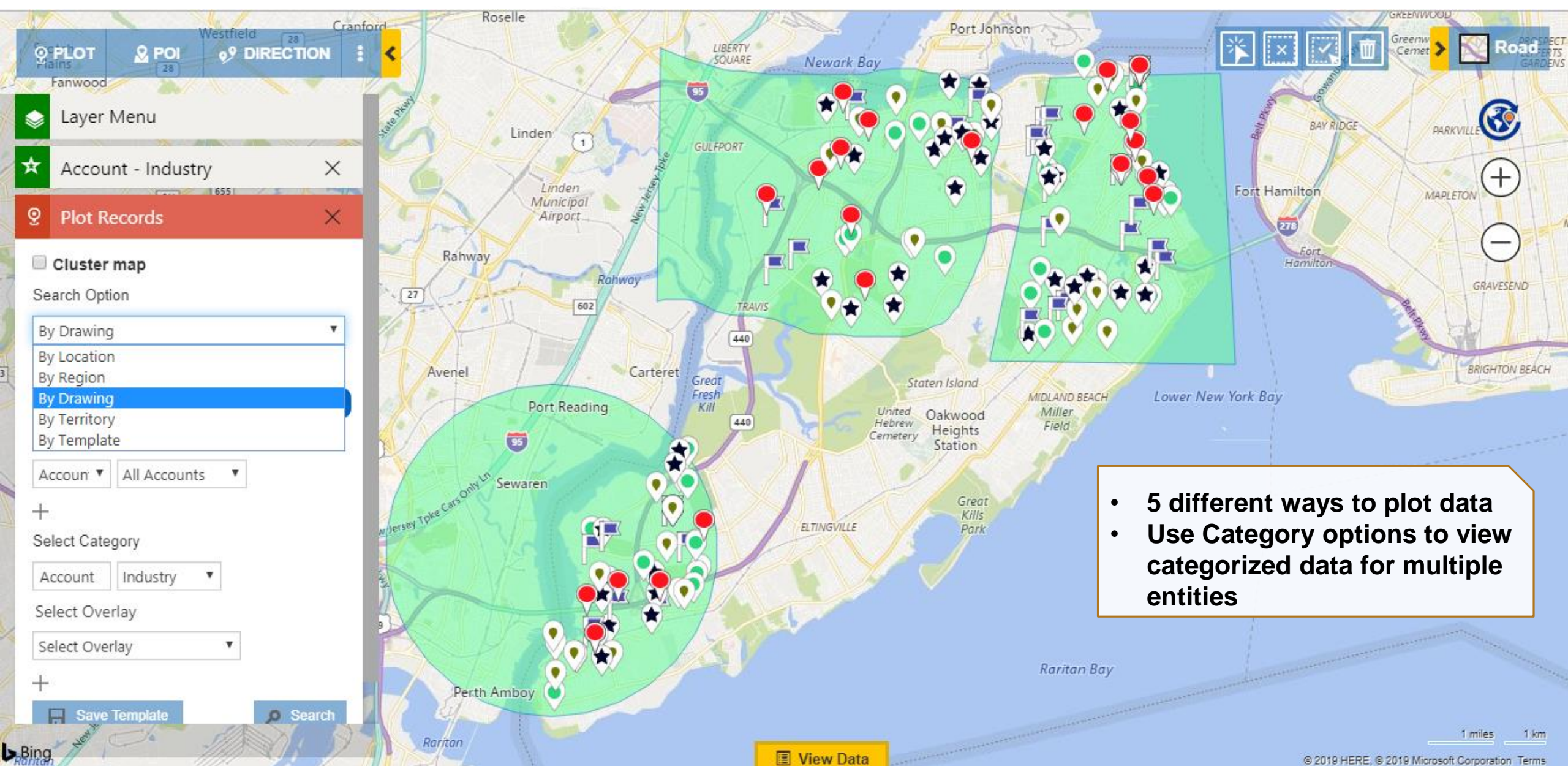India.

Directions    Search nearby    Save to map

Find Latitude
and Longitude
of your address data

India · Maharashtra · Thane · Turbhe

- **Find Latitude & Longitude of your address data**
- **Locate Client geographically**

- **Geocode Millions of CRM Records**
- **Easy & interactive platform for geocoding records**

# MAP YOUR DATA



- **Plot categorized data for multiple entities**
- **Add your own icons to visualize record pushpins**
- **Resizable data grid**

# MULTIPLE OPTIONS TO PLOT DATA



- **5 different ways to plot data**
- **Use Category options to view categorized data for multiple entities**

www.inogic.com   www.maplytics.com   Maplytics™ by Inogic

# TERRITORY MANAGEMENT
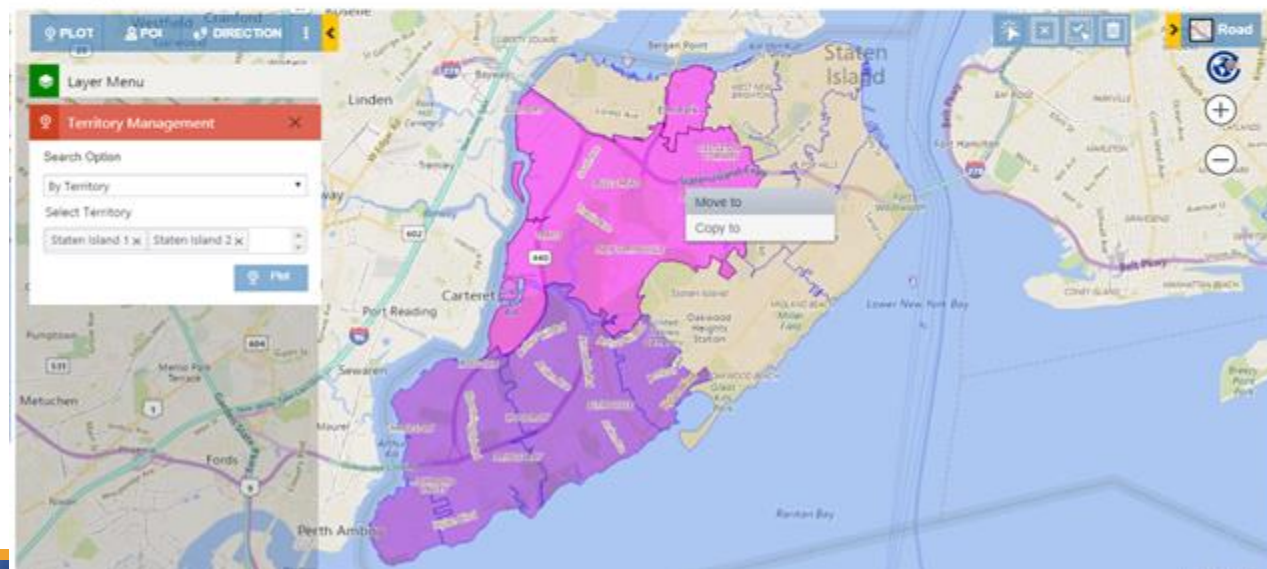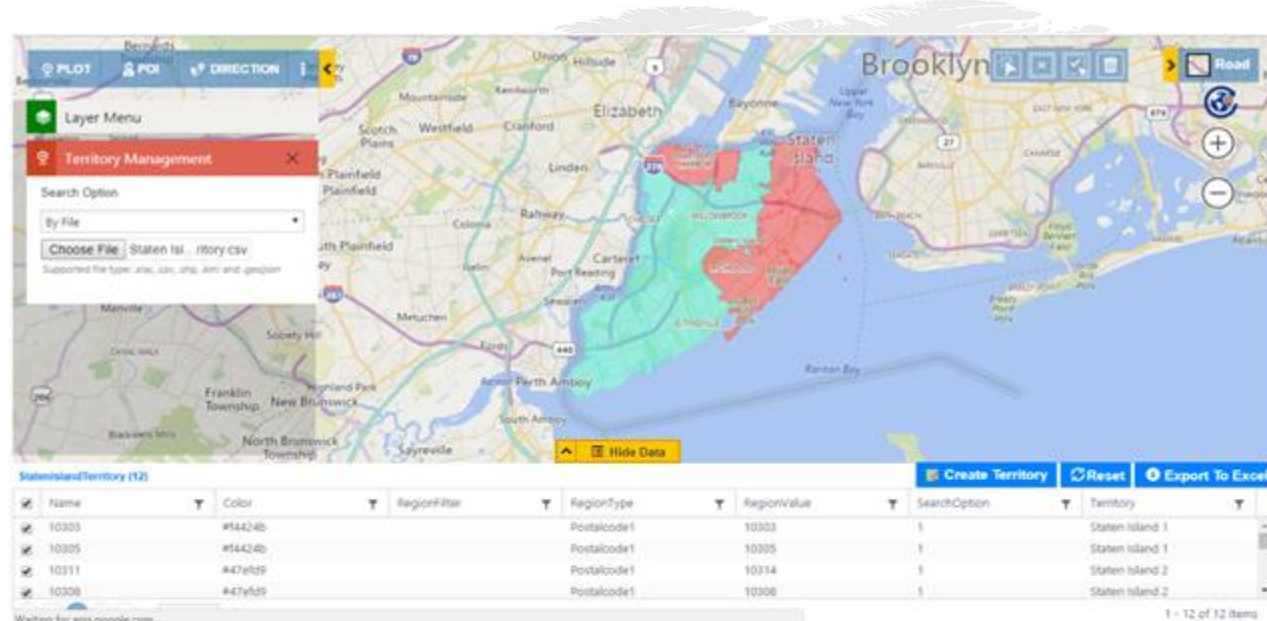


- **Create and align territories right through the map**
- **Create Multiple Geographies in one click by uploading an Excel file**
- **Assign multiple territories to a record and visualize them on map**

# PROXIMITY SEARCH



- **Quickly find nearby records by performing Proximity for distance or time**
- **Save data as a marketing list or a personal view**
- **Save searched criteria as a template in Dynamics 365/CRM**

# CONCENTRIC PROXIMITY SEARCH



- **Perform radius searches up to 3 radii**
- **Filter the data based on Straight line distance & proximity zones**
- **Get shortest travel distance in proximity search**

# QUICK CALL TO ACTION

- **Define quick actions to perform on individual records**
- **Visualize one to many relationship (Plot Related Records)**
- **Perform Mass actions on plotted records**

**Action Buttons**
- Change Owner
- Open Record Form
- Plot Related Record
- Run Workflow
- Define Activity Actions

# APPOINTMENT PLANNER



- Visualize all appointments on map
- Categorize your appointments by priority or other parameter

# ROUTE OPTIMIZATION & SHARING



- **Build an optimized Route**
- **Save, Print or Share these Routes via Email**
- **Quickly switch to Google Map/Waze app for turn by turn navigation**
- **Overlay data points on the route**
- **Along the route search**
- **Ability to copy and share navigation links**

# AUTO SCHEDULING



- **Auto schedule appointment plan in few clicks**
- **Set preferences for the plan in Auto scheduling card**
- **Save appointments and the routes created**

**Schedule for 09/05/2018 (7)**

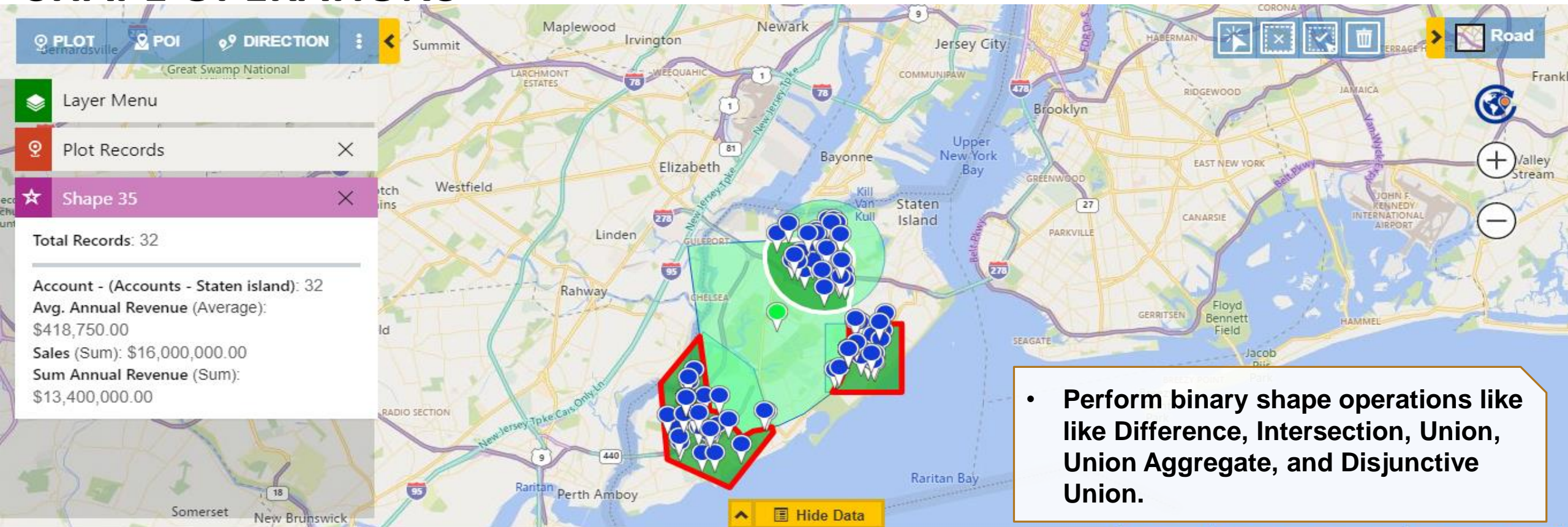| Way... | Start Date | End Date ▲ | Account Name | Main Phone | Address 1: City | Primary Contact | Email | Status |
|--------|-----------|-----------|--------------|-----------|-----------------|-----------------|-------|--------|
| B | 9/5/2018 8:25 AM | 9/5/2018 8:55 AM | A. DUBRAVKA ANTIC & SONS | 30281497971 | Staten Island | E. GHEORGHE NICOLESCU | some_6647@... | Active |
| C | 9/5/2018 9:25 AM | 9/5/2018 9:55 AM | A. ZARINA ROSS & SONS | 11073015943 | Staten Island | A. EASA MOULANA | some_15132... | Active |
| D | 9/5/2018 10:20 AM | 9/5/2018 10:50 AM | A. IDA GALEA & SONS | 32127420154 | Staten Island | Arletta Naomi | arletta_naomi... | Active |
| E | 9/5/2018 11:15 AM | 9/5/2018 11:45 AM | A. ALEXANDRA HERRERA & S... | 22486741621 | Staten Island | ). WU (WOODY) CHEN | some_6376@... | Active |

# Check-In on Field



- **Define Geofencing for Check-In/Check-Out on field**
- **Keep a track of field team's daily activities and performance**

# SHAPE OPERATIONS



- **Perform binary shape operations like like Difference, Intersection, Union, Union Aggregate, and Disjunctive Union.**

# Census data visualization

# SHAPE LAYER INTEGATION
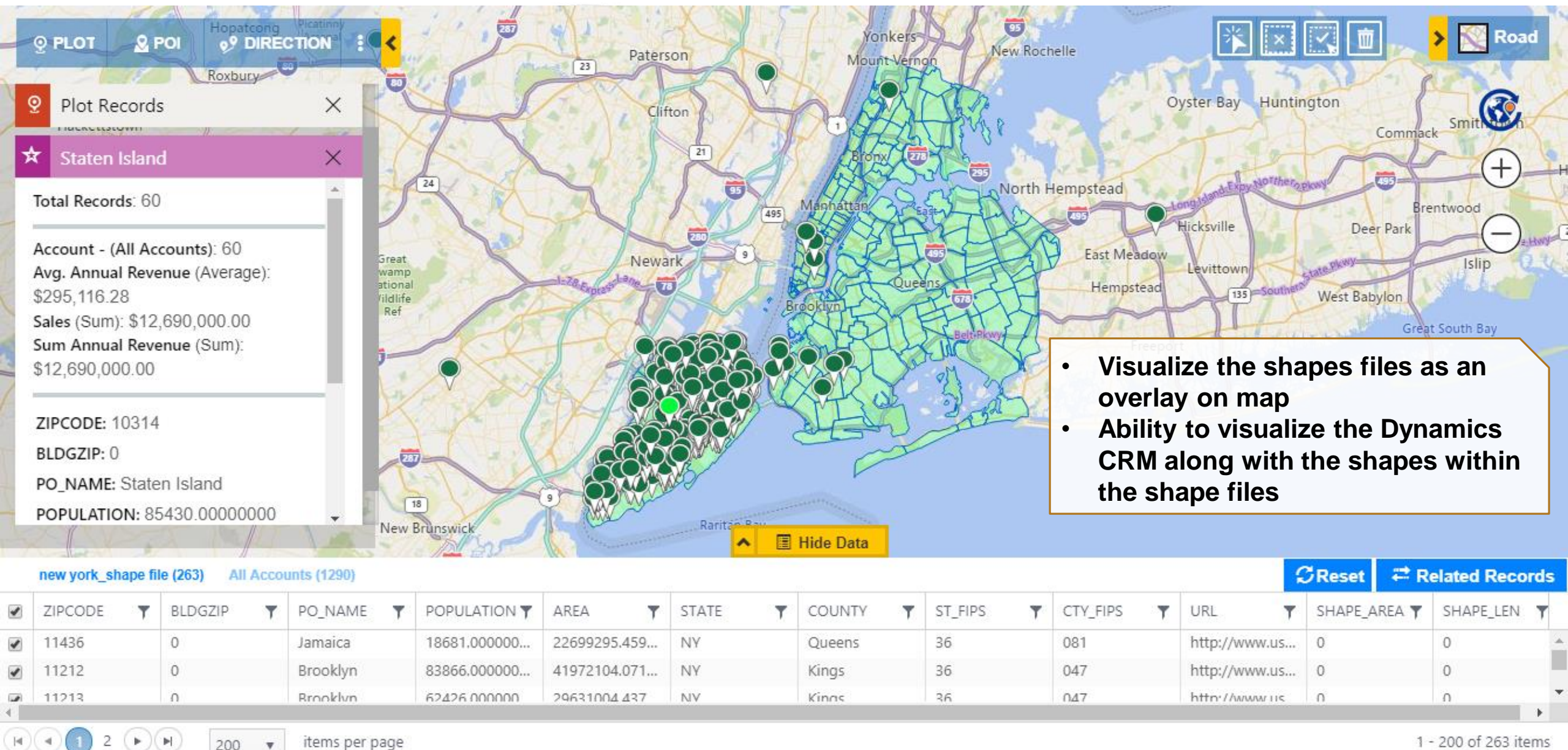


- **Visualize the shapes files as an overlay on map**
- **Ability to visualize the Dynamics CRM along with the shapes within the shape files**

# NEARBY PLACES



- **Search POI locations like Coffee shops, Hotels, etc.**
- **Add them as new accounts, leads or any custom entity records into CRM**
- **Search with own keywords**
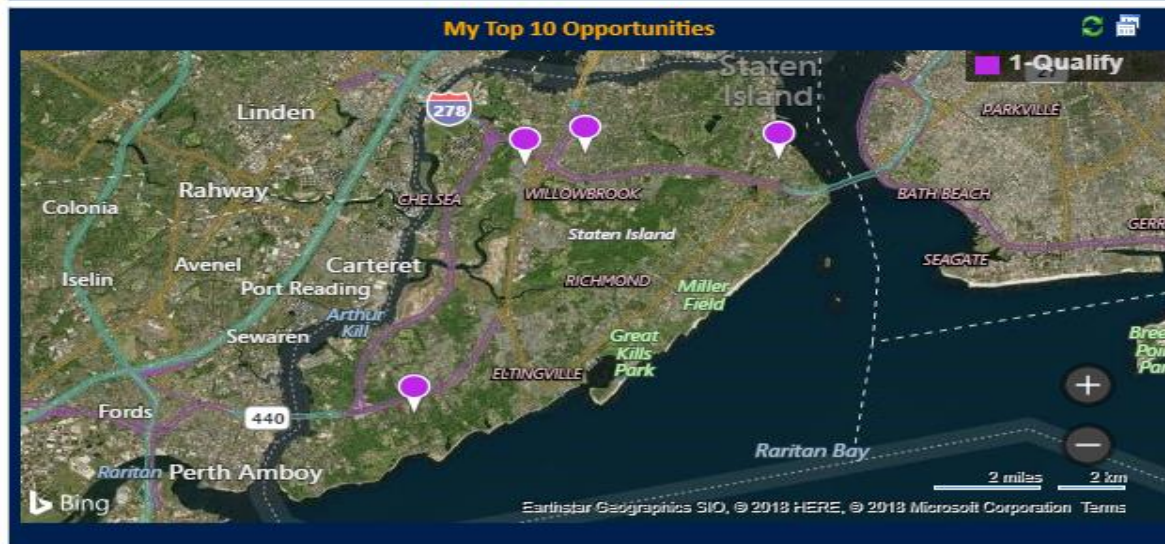
# PCF Map Controls



- **Map View Control on Form**
- **Map Edit Control on Form**
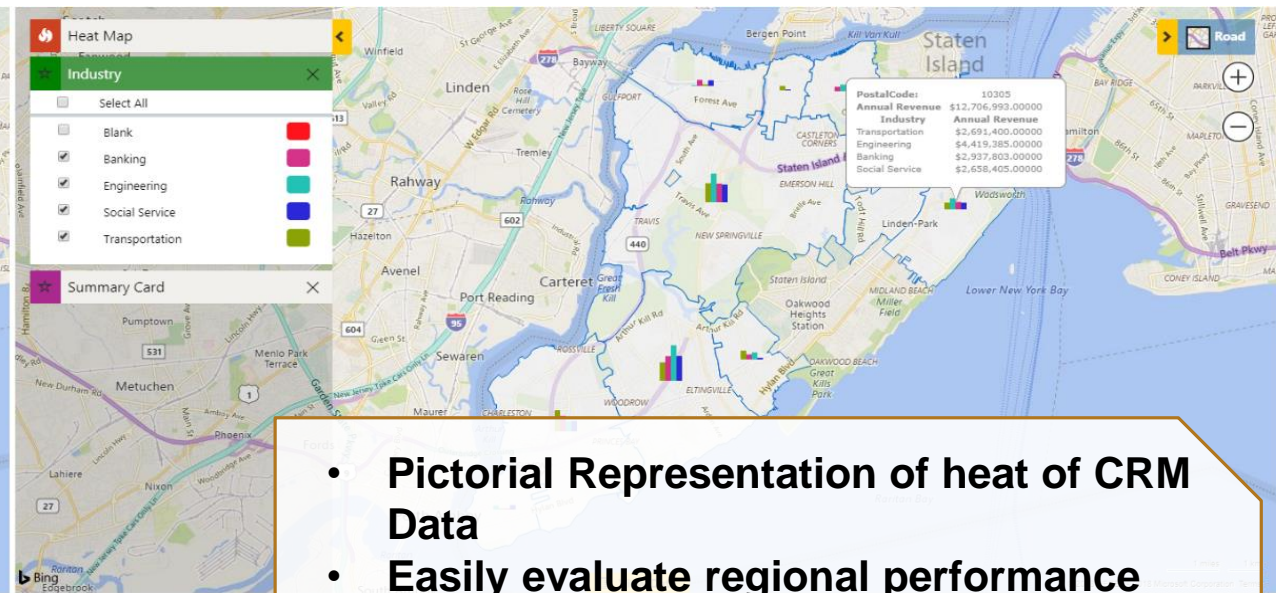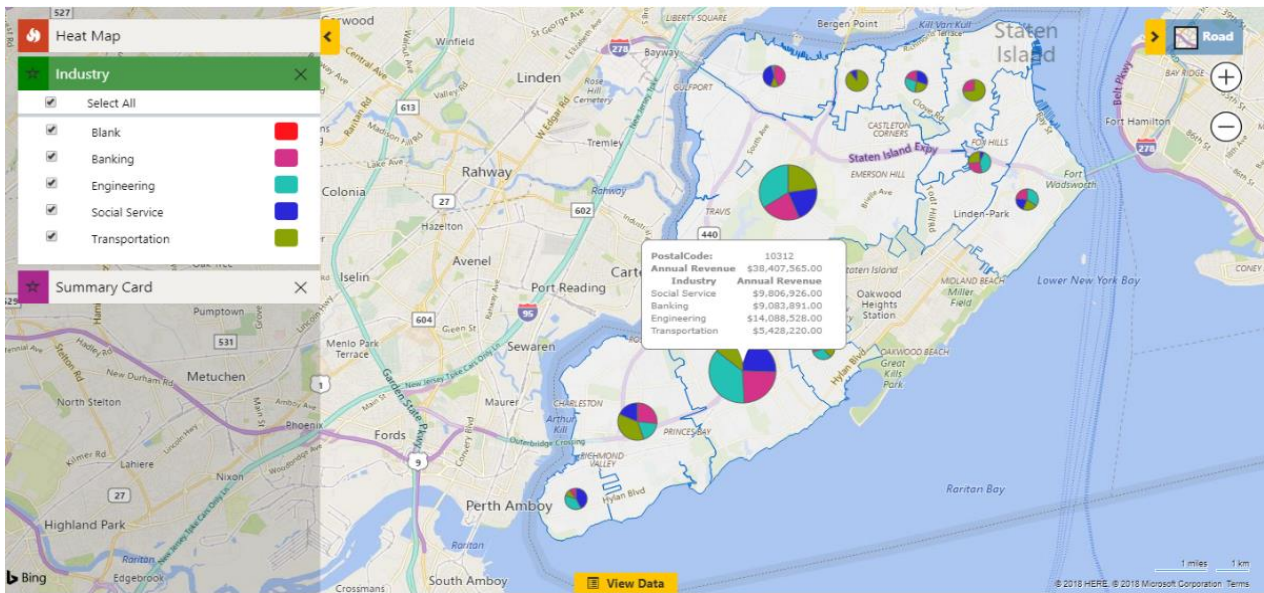- **Map View Control on Dataset**

# ANALYTICAL DASHBOARD
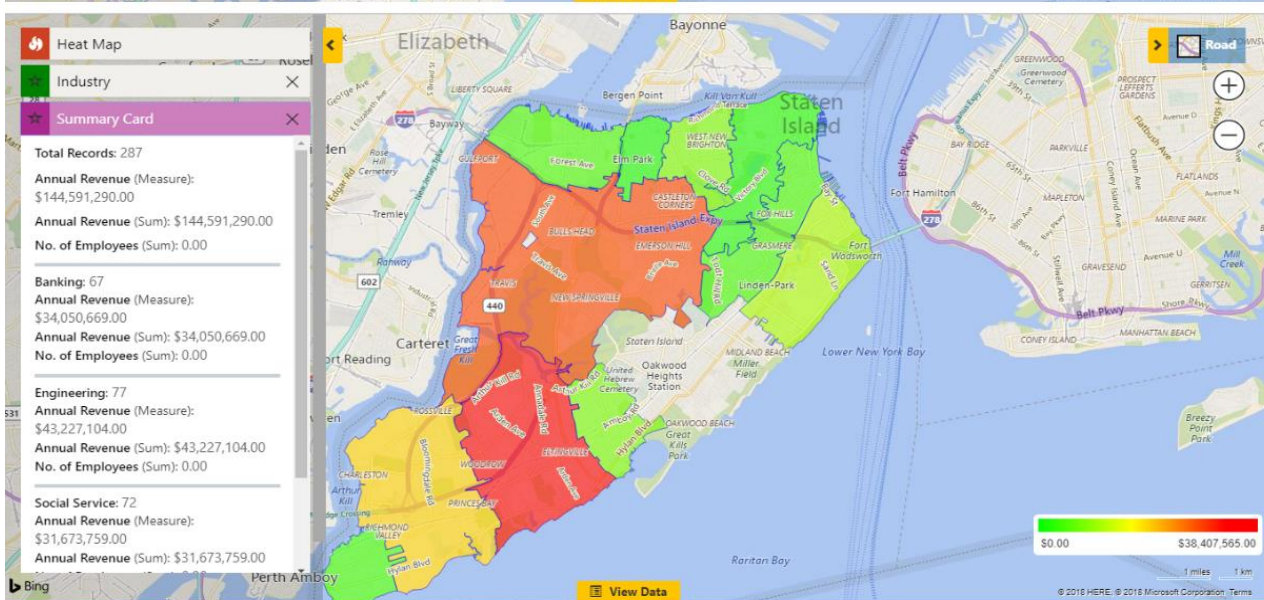
- **Easy way to visualize & analyze data**
- **Easily create & configure dashboard views**
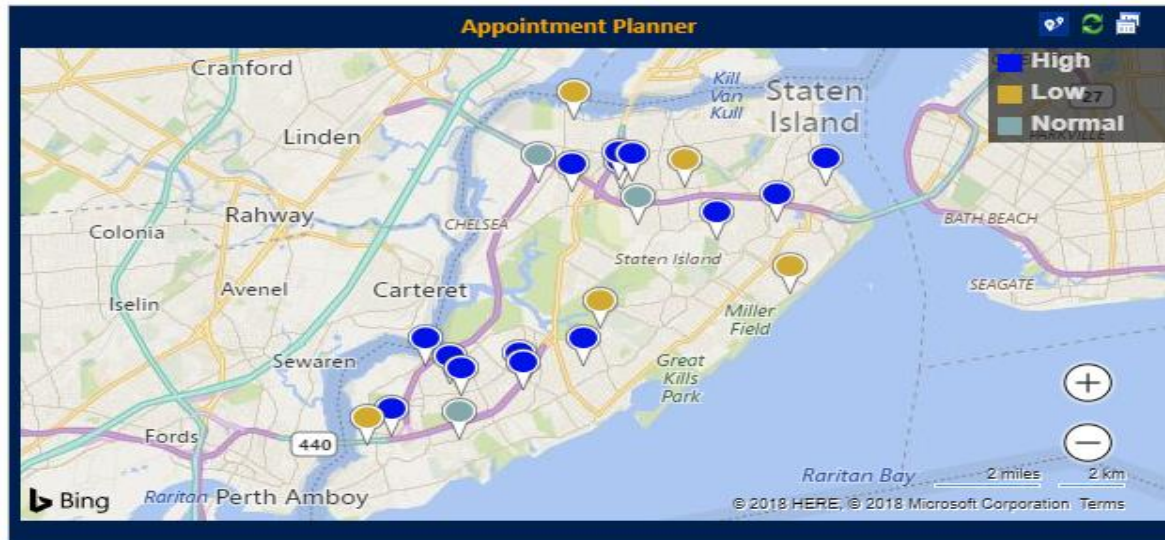
# HEAT MAPS



- **Pictorial Representation of heat of CRM Data**
- **Easily evaluate regional performance**
- **Hands on filters for better analysis**
- **Summary Card for aggregate information of each region**
- **Pie charts and Column charts for advance analysis**
- **Resizable grid**

# Common Use Cases

➢ Setting up/ realigning Sales Territories on basis of geography for your field professionals

➢ Reducing travelling expenses through optimized automated schedules

➢ One of my client has cancelled his meeting, search for near-by clients.

➢ Ideal location for my next marketing event?

➢ Analyse shape files along with the records on the same map

➢ Provide selective access of geo-mapping to your users

➢ View my lost leads in last 6 months in analytical dashboards

➢ Which region is performing well in terms of sales?

➢ Analyse the population for a particular region with Census data

# Device Compatibility

**Desktop**
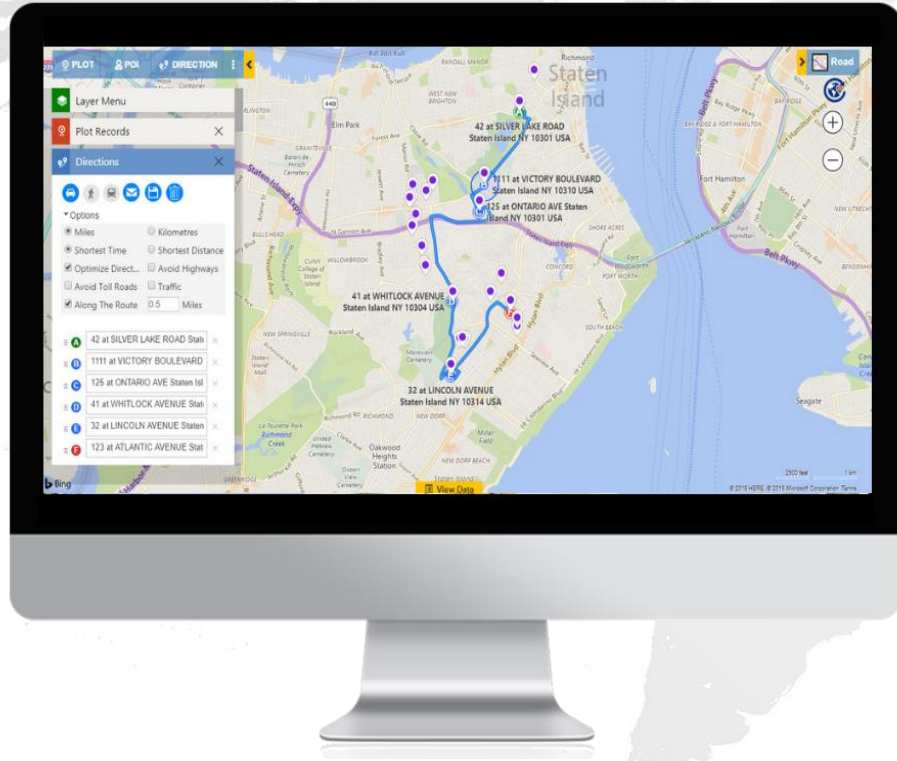
**Tablet**
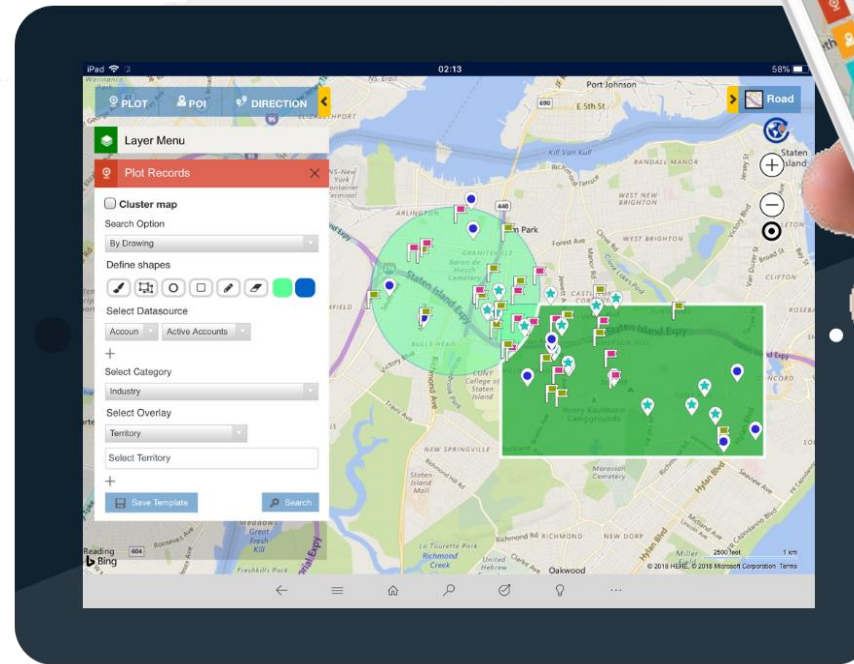
**Mobile**

THANK YOU

Email us on crm@inogic.com

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