Maplytics™ White Paper

Aim

Maplytics is a Geo-Mapping tool aimed to help visualizing Dynamics CRM data on map for analysis.

Target Audience

Sales Managers - Help visualize the sales and customer data through color-coded pushpins and heat maps by means of Dashboards.

Sales Staff – Assist them to identify the customer location and plan their itinerary across various customer appointments.

Marketing Team - Target customers based on their proximity to a particular location.

Available for

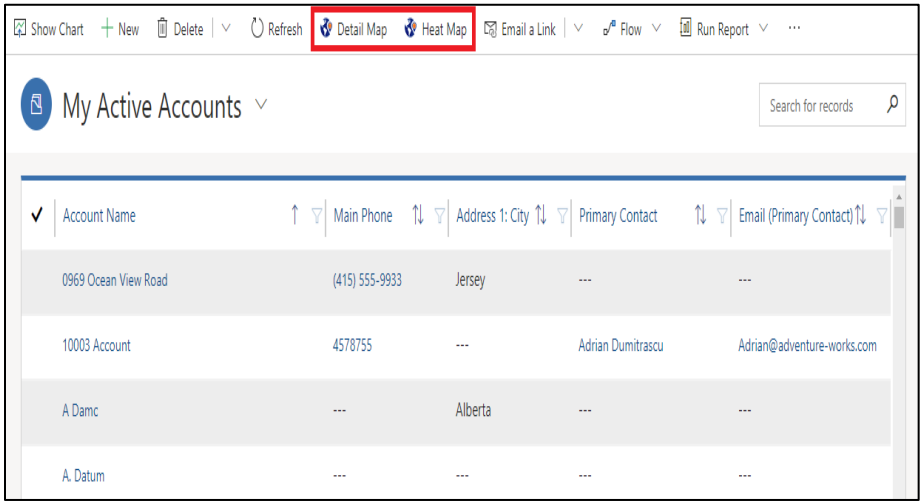
Versions: Dynamics 365 8.2 and above
Deployment Models: On-Premises and Online
Supports PowerApps and CDS
Languages: English, Spanish, German, French, Portuguese, and Turkish.

Features

- ✓ Geo Code Address field data
- ✓ Plot any entity record on the map
- ✓ Territory Management
- ✓ Auto Scheduling
- ✓ Pie chart/Column chart in Heat map
- ✓ Shape operations
- ✓ Auto Search Window
- ✓ Maplytics Security Template
- ✓ Bulk geographies upload
- ✓ Overlay
- ✓ Redesigned Drawing Toolbar
- ✓ PowerApps Component Framework
- ✓ Layer Menu
- ✓ Plot Saved Templates on individual records
- ✓ Multi-language Support
- ✓ Radius Search across multiple entities
- ✓ Concentric Proximity search
- ✓ Search nearby POI location like restaurants, hotels, airports, etc.
- ✓ Build Marketing list from Map
- ✓ Color Coding & shape of pins based on categories
- ✓ Routing using multiple waypoints
- ✓ Along the Route search
- ✓ Route Redirect for turn by turn navigation on mobiles and tablets
- ✓ Aggregate Card on Detail and Heat Map
- ✓ Heat map for data analysis
- ✓ Configurable color scale for Heat Map measure
- ✓ Geo Analytical dashboard with real time data
- ✓ Save Proximity Search parameters as Template
- ✓ Geocoding Confidence Rating
- ✓ Configurable Entity maps and Dashboards for any Dynamics CRM entity
- ✓ Plot Related(Child) records for drill-down analysis
- ✓ Snap Waypoints
- ✓ Spider Cluster and Cluster area
- ✓ Filter data by Shapes
- ✓ Territory Alignment
- ✓ Census Data visualization
- ✓ Support for CDS
- ✓ Bring your own icons
- ✓ Resizable View data grid
- ✓ Multiple category on plot card
- ✓ Multiple territory for a record
- ✓ Check-In

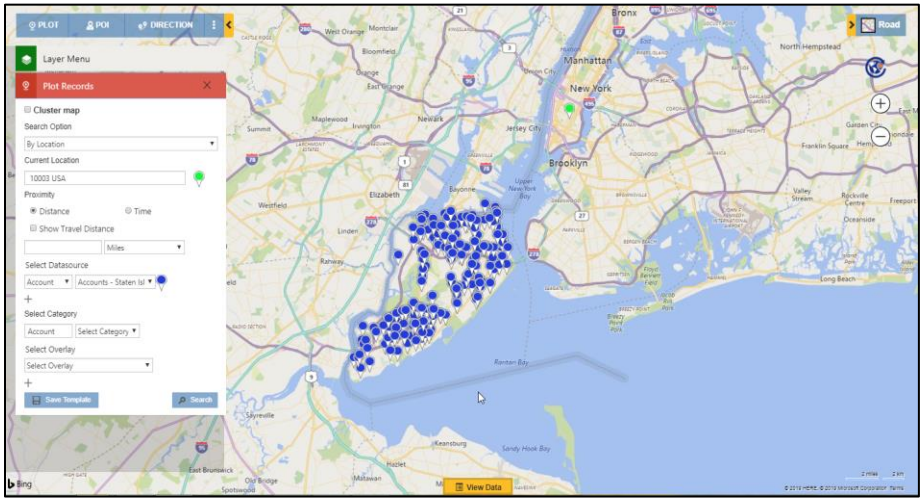
Ease of Access

Map button has been added to ribbon of all entities.



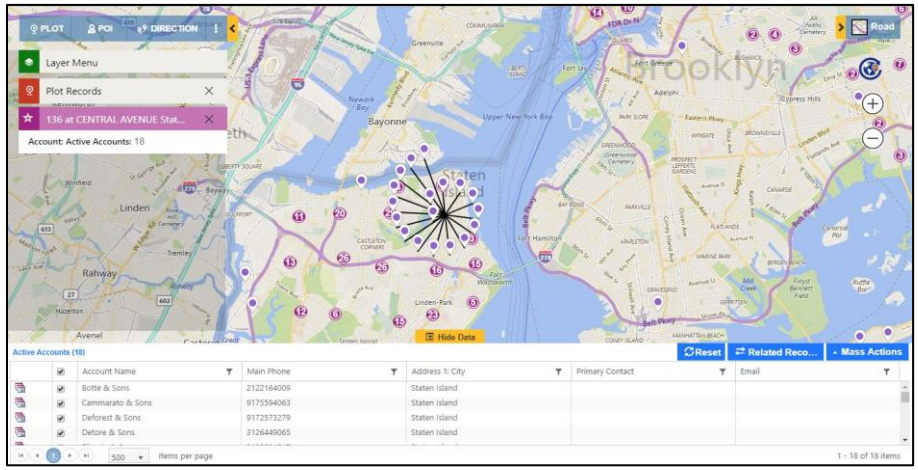
Plotting Multiple Records across Multiple Entities

Plot multiple records of desired entities specifying current location and proximity. Also, plot related records for drill-down analysis or plot nearby POI like restaurants, airports, etc.



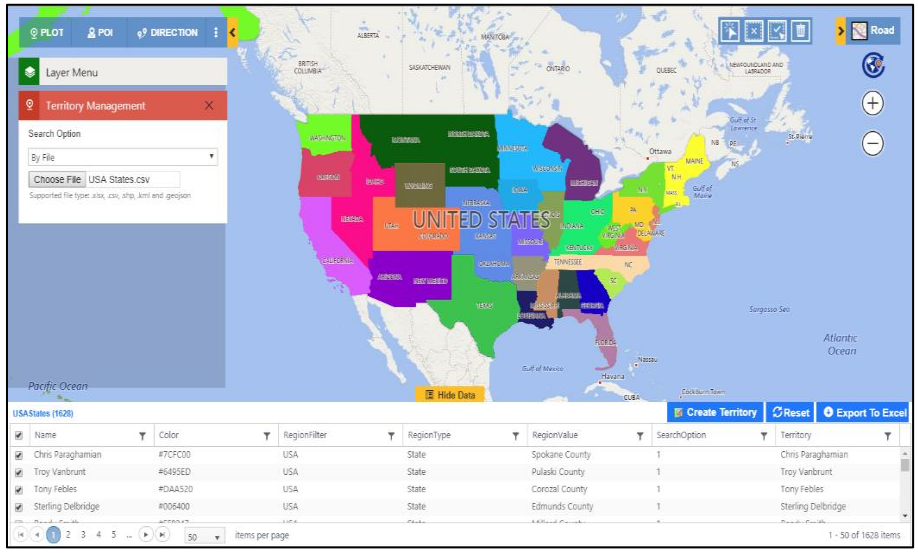
Spider cluster

User can click on any cluster to view the pushpins existing in the same in the form of a 'Spider cluster'.



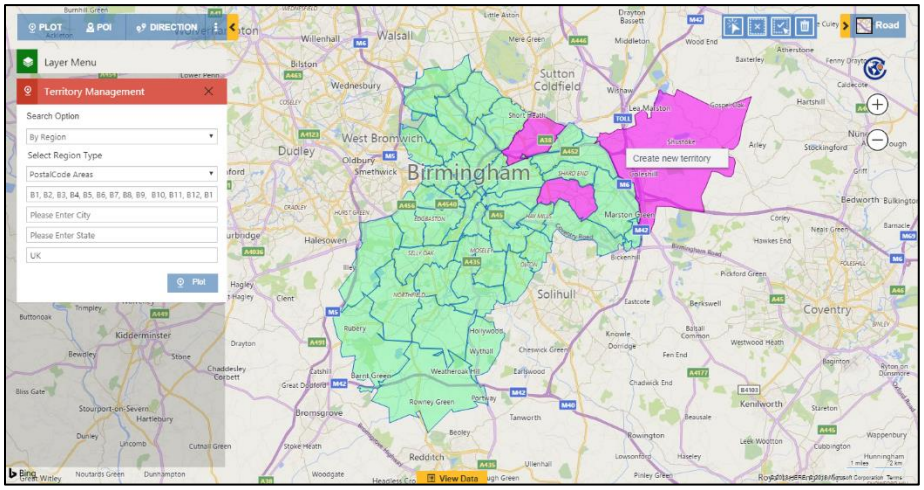
Territory Management

Users can plot shape files, excel files, and create new territories.



Territory alignment tool

This helps the user to select regions and create new territories. Users can further align existing territories.

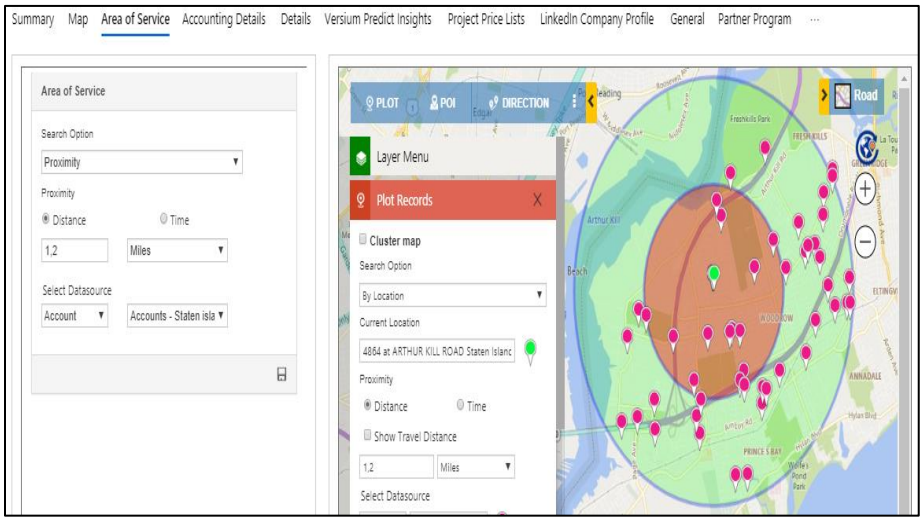


Overlay

This helps user to view the Dynamics CRM records along with shapes files and existing territories plotted on the map.

Area of Service

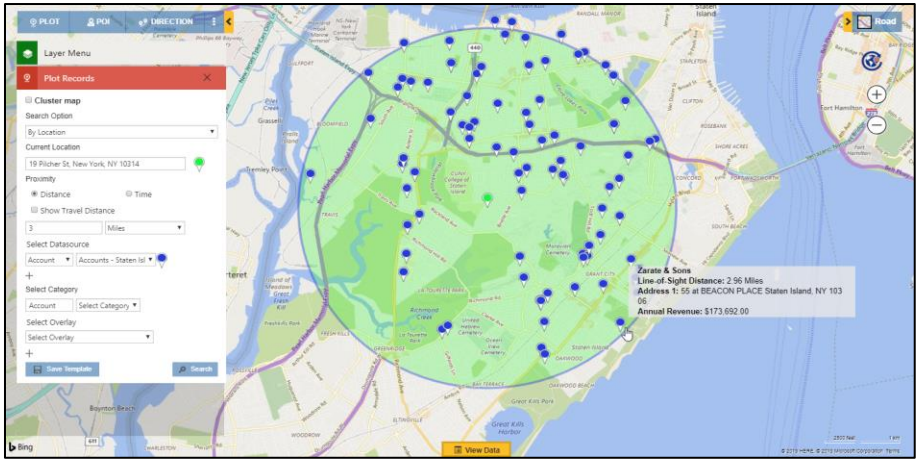
The user can view the data in a proximity or a region around an individual record as defined by the user in the Area of Service.



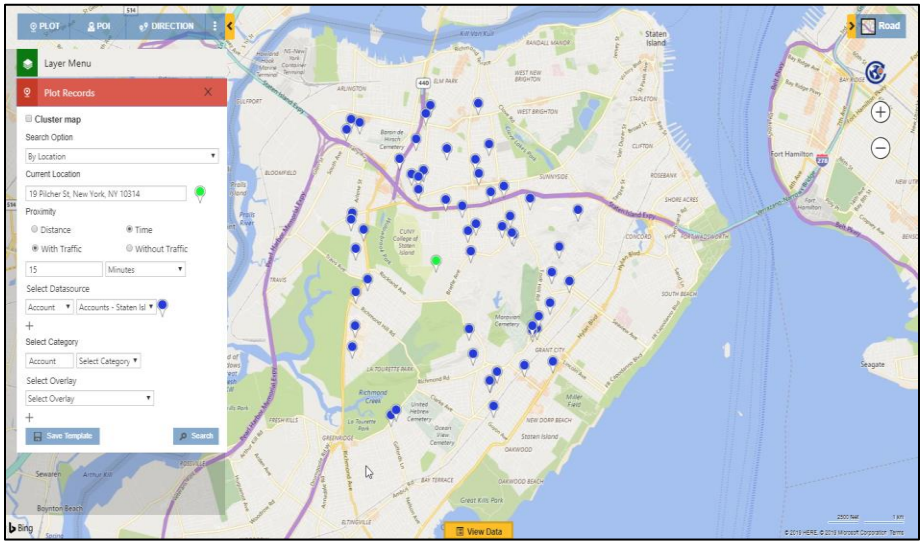
Proximity Search

Find nearby records within the defined proximity from the current location by either distance or time.

By Distance: This will calculate the straight-line distance between the current location and all the points, which fall in the proximity parameter.

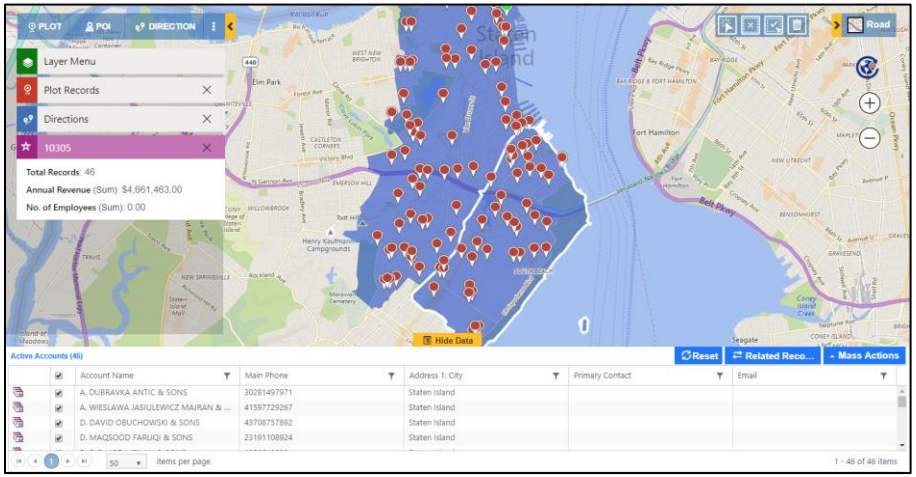


By Time: This will calculate how many points fall in ‘x’ minutes or hours of driving distance from current location.



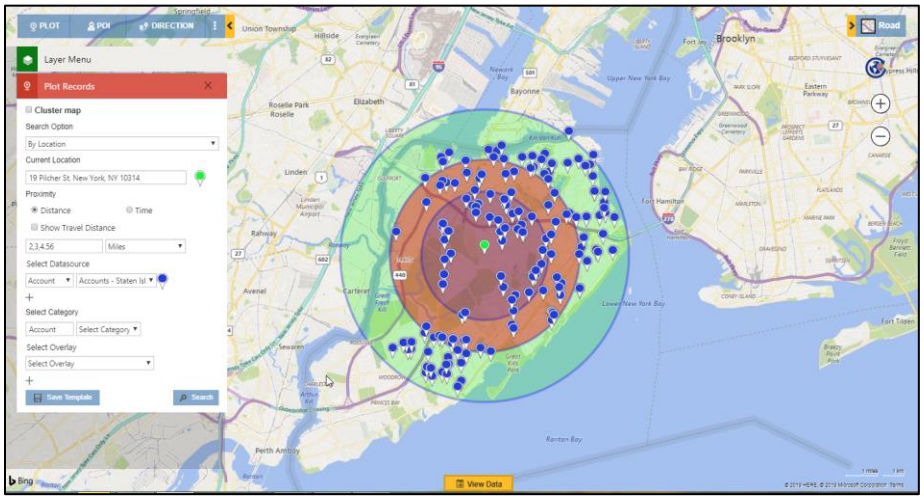
Summary Card

The user can click on any enclosed area on the Detail Map and Heat Map to get the summarized information of the records that lies in that area.



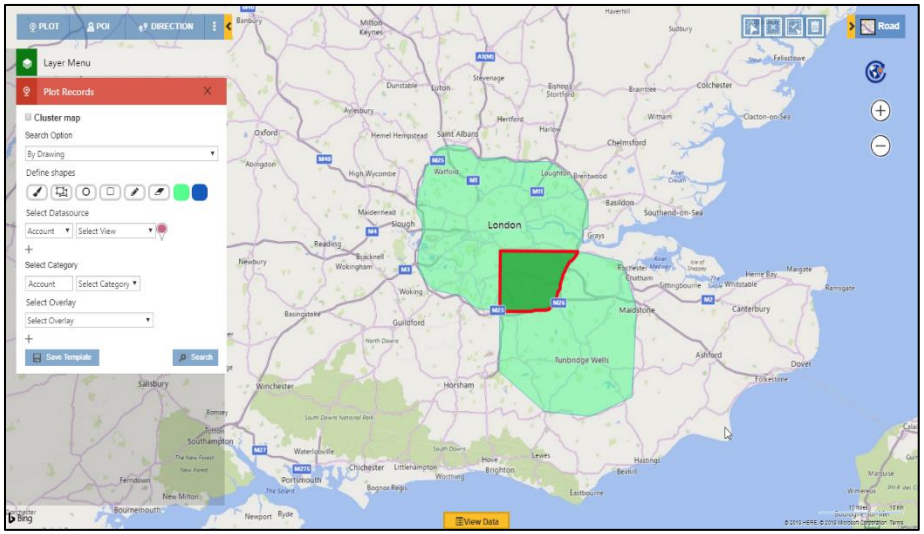
Concentric Proximity Search

The users can perform up to 3-proximity search simultaneously using Concentric Proximity Search.



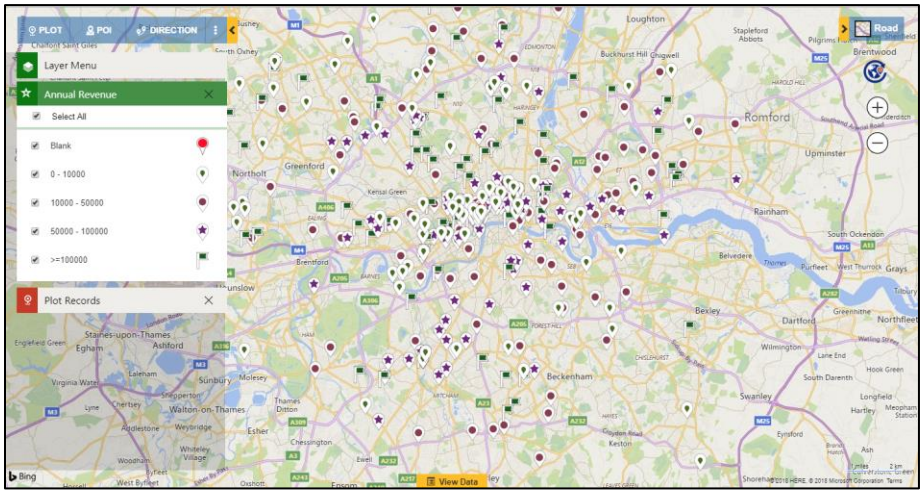
Shape Operations

Users can perform Binary operations on the shapes drawn on the map.



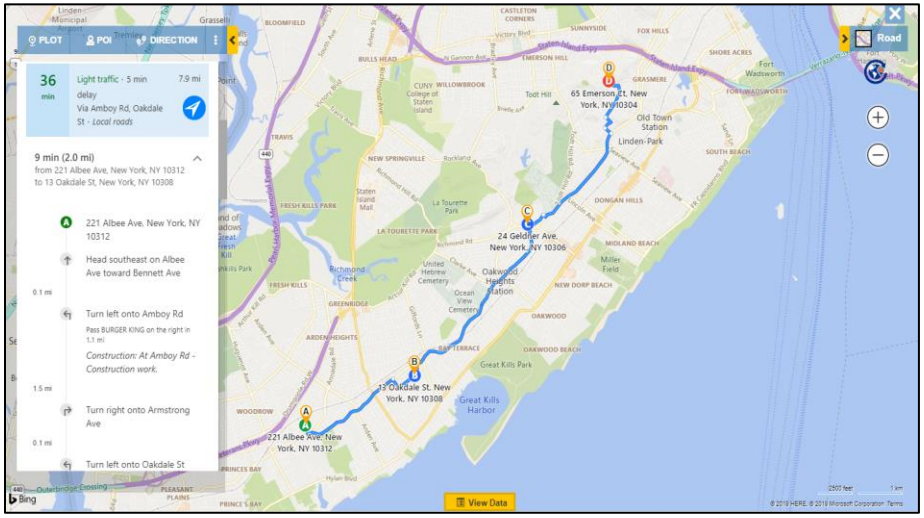
Color-coding of Pushpins

Color-coding and shape of pushpin based on categorizations.



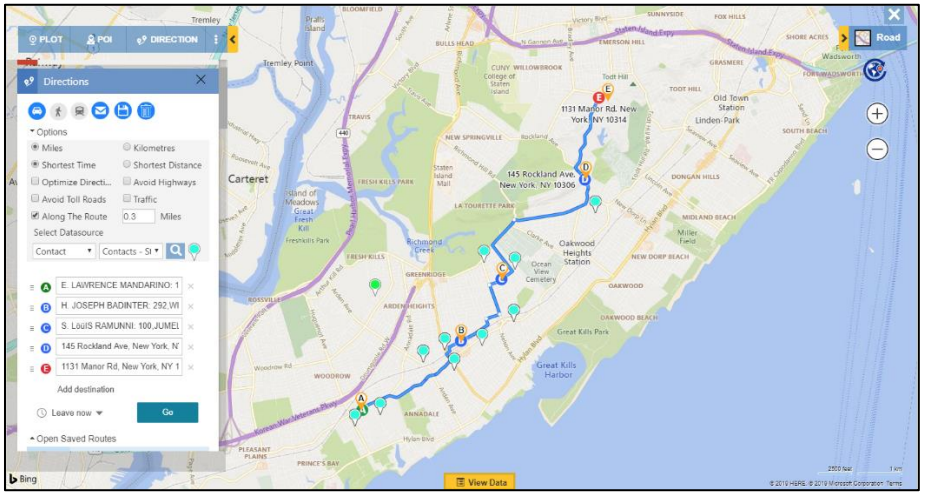
Detailed Directions to the location

Get the route details between multiple waypoints with the ability to search for the optimum route between various waypoints provided.



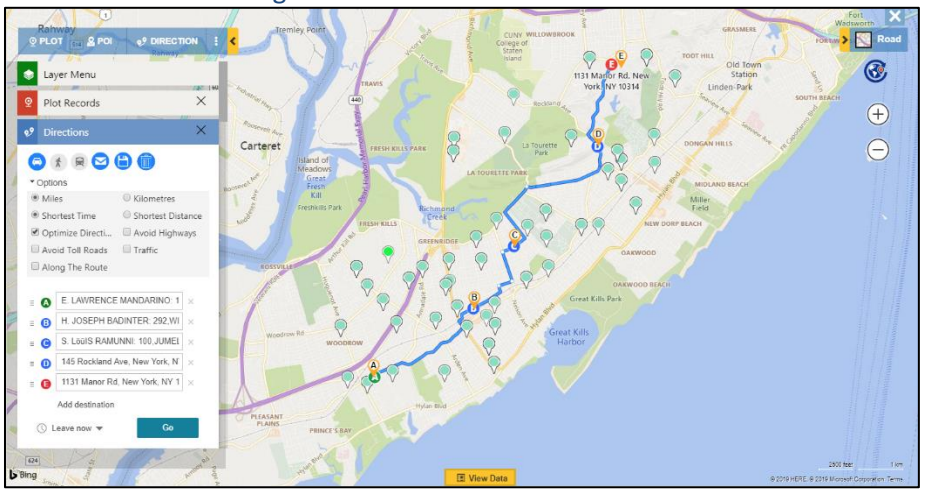
Along the Route Search

Search the records that falls in the defined proximity along the route.



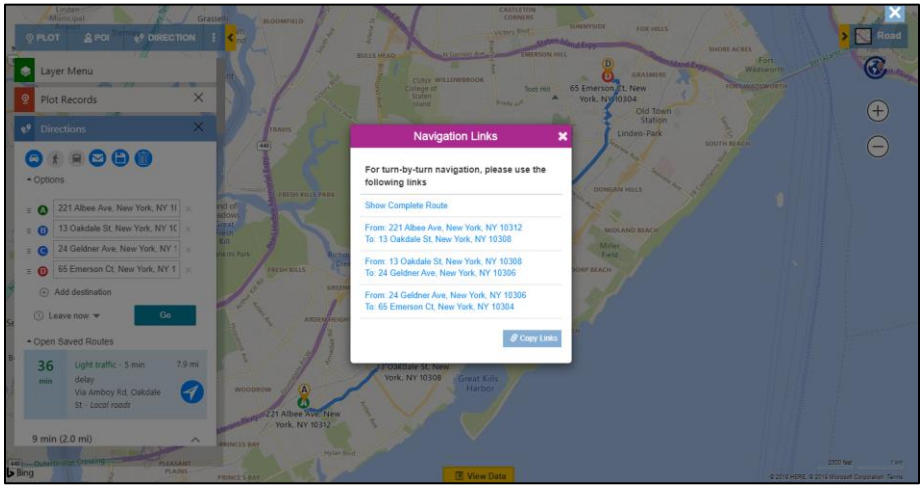
Merged Route and Plot View

Users can now create route and have the plotted data on the same map screen as well. This makes it easy for the user to add more waypoints to the route without switching between Plot and Directions card.



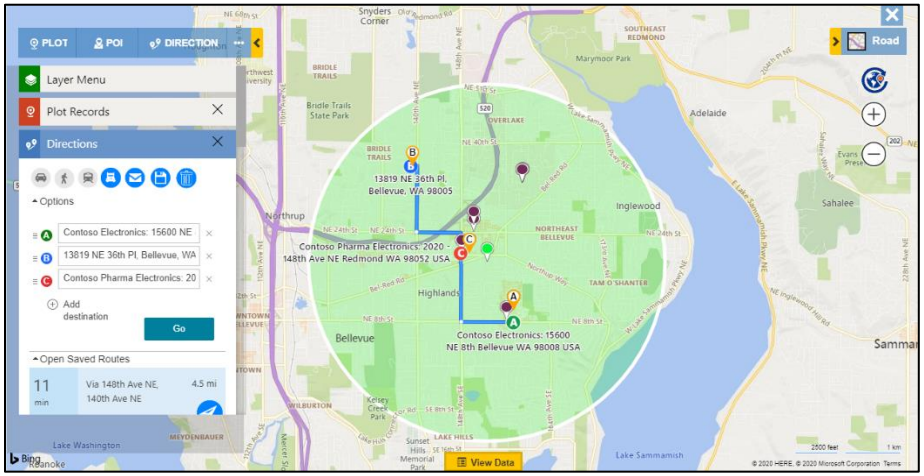
Route Redirect and Copy Navigation Links

The user can click on individual links for turn-by-turn navigations from point A – B, B – C, and so on. The links redirects on the Google Maps site on desktop and Google Maps App on Phones and Tablets.



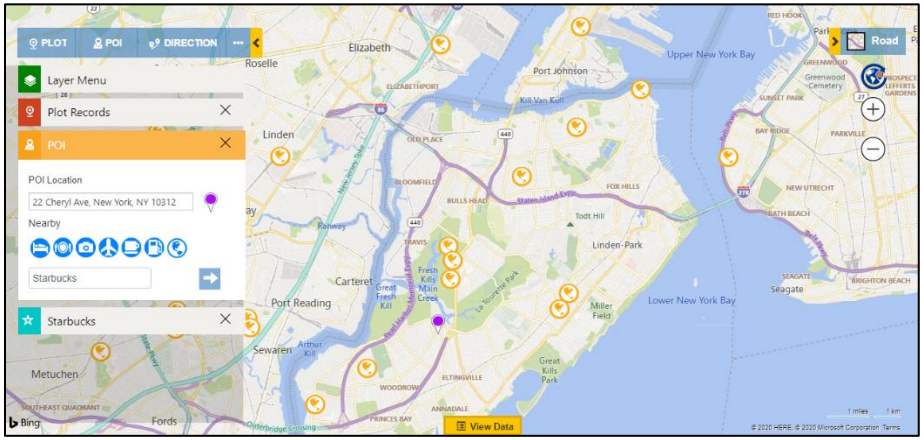
Truck Route

User can search for Shortest Travel Distance to required records based on driving by truck as well as create an optimized route for truck.



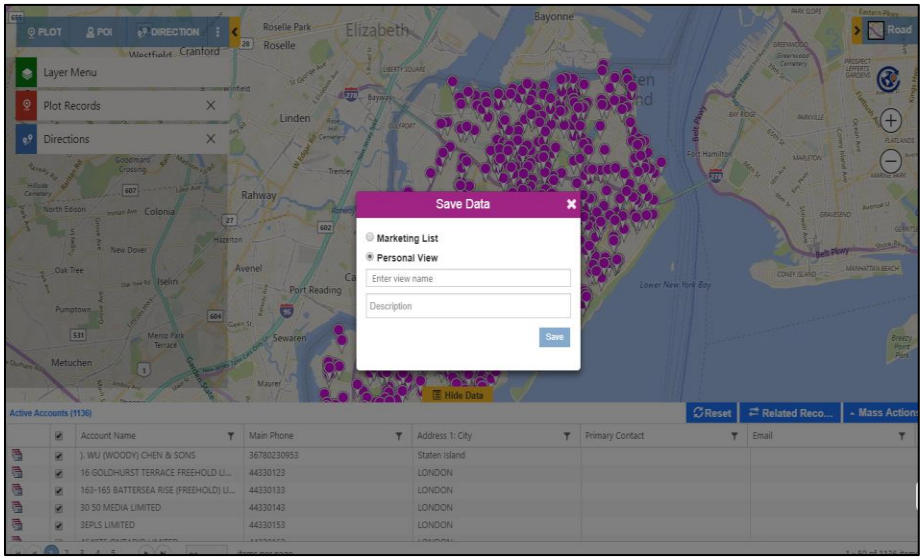
Point of Interest (POI) Search

Ability to search for any points of interest (POI) like ATMs, restaurants, hotels, etc. in the vicinity. This will be plotted alongside the CRM data. Users can enter a keyword to search for required POI locations.

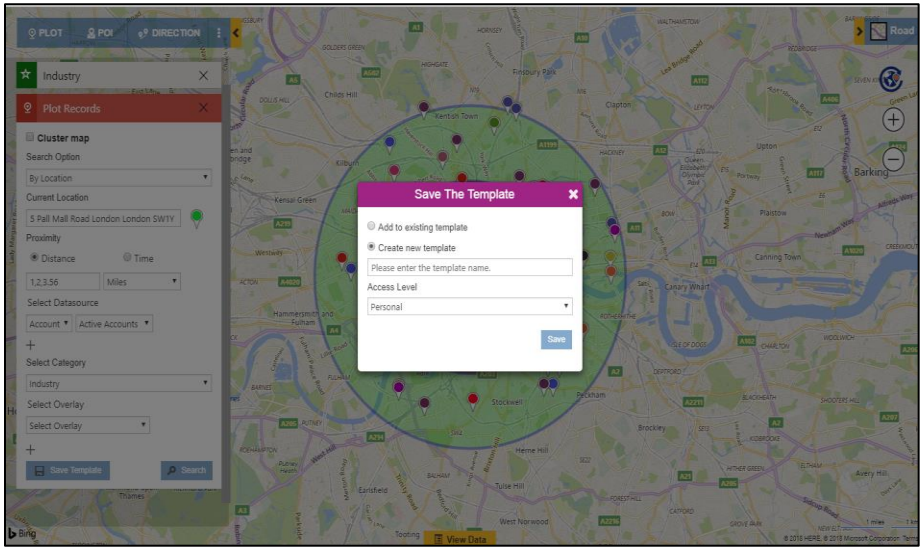


Listing of the Search Results

Ability to save the search results as static personal view or marketing list.

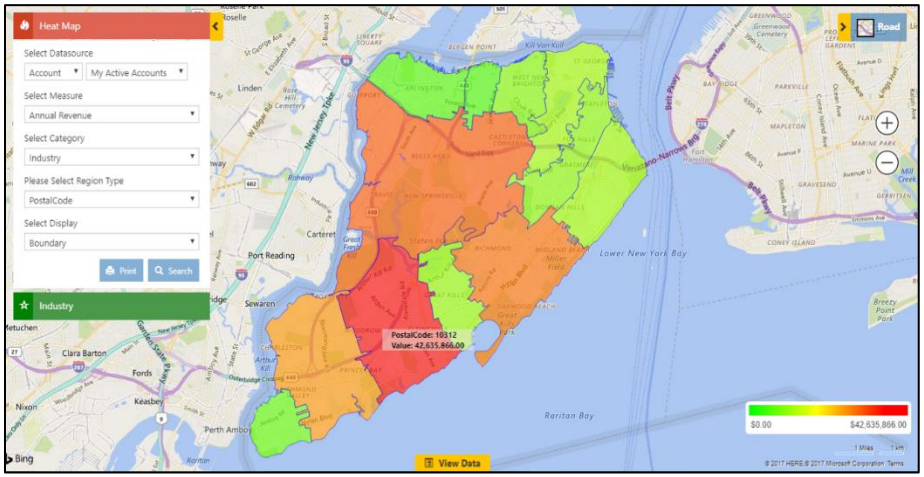


Users can also save search criteria as a template.



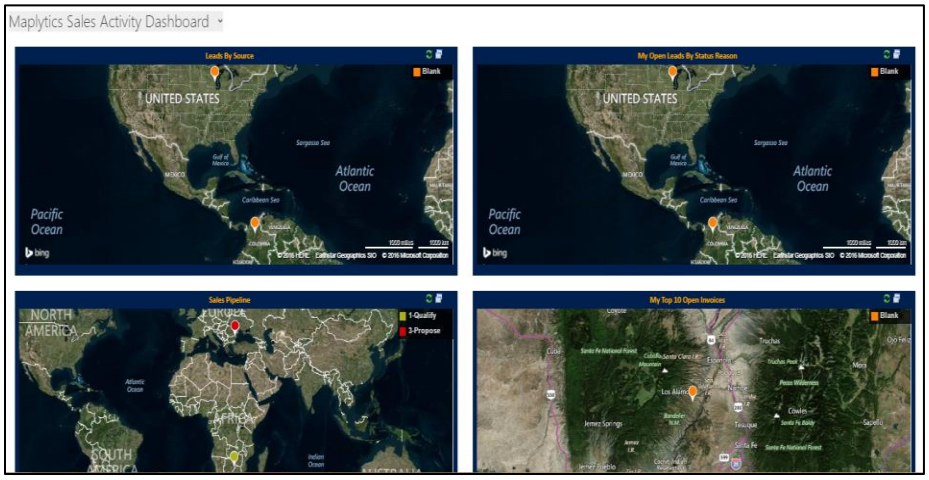
Heat Map Visualizations

Visualize your customer and sales data as Heat Maps to get a better understanding of your customer/sales distribution across geography.



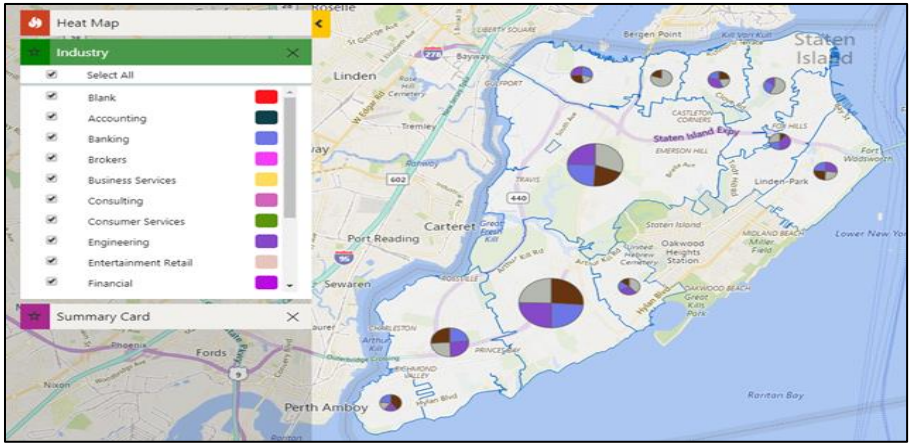
Dashboard Support

Users can include Maplytics component as a Dashboard web resource. Dashboard queries are configurable.



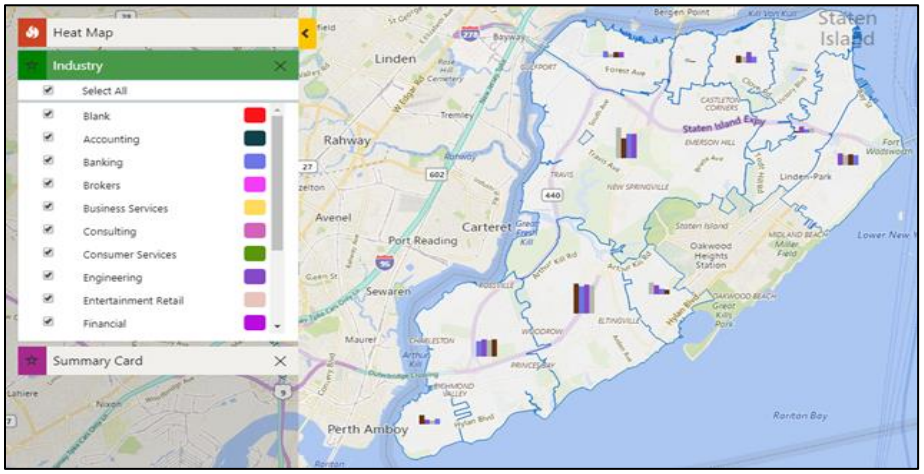
Pie Charts in Heat Map

Users can view the data in the form of Pie charts based on the heat of the attribute selected in the Measure and Filter.



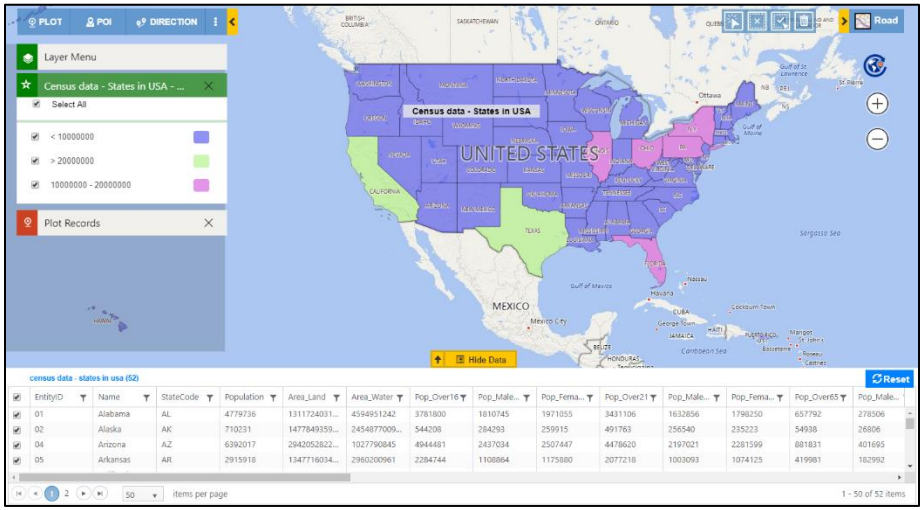
Column Charts in Heat Map

Visualize the data in the form of column charts plotted on the basis of the heat of the attribute selected in the Measure and Filter.



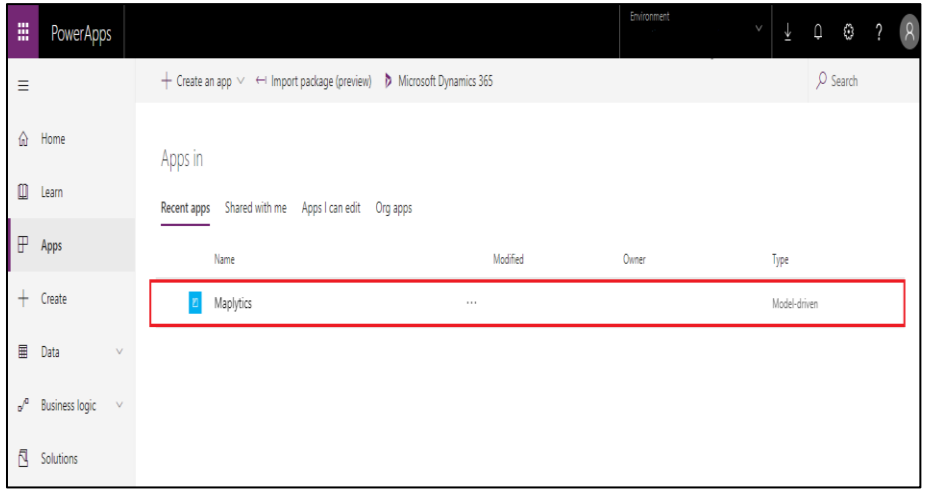
Census Data Visualization

Visualize census data on map within your Dynamics CRM. We have provided few census data for USA by default.



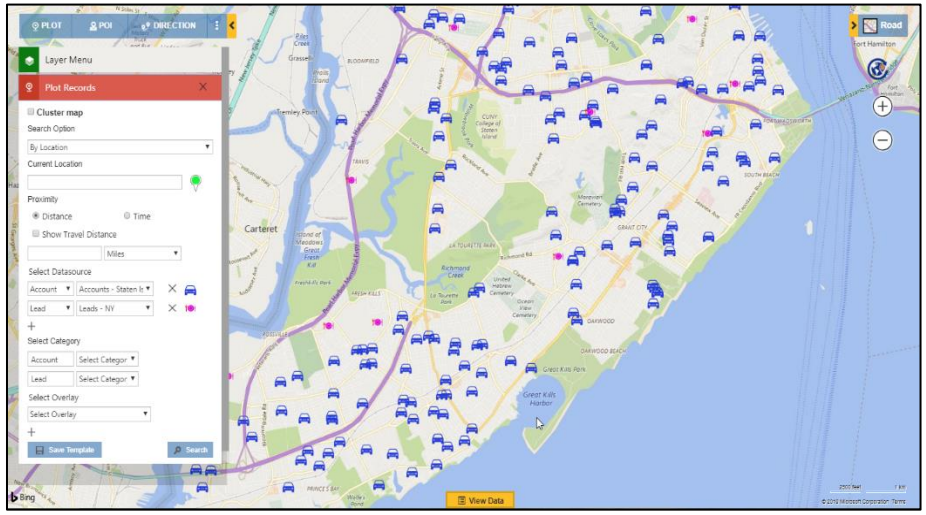
Support for CDS

Deploy Maplytics on PowerApps now. All the base Entities are supported.



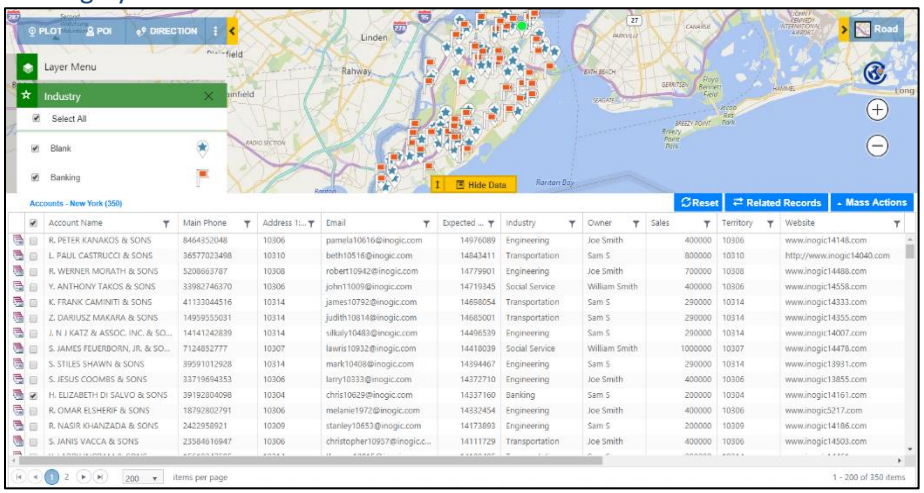
Bring your own icons

Users can use their personalized icons for pushpins. This makes the representation of pushpins even more relatable.



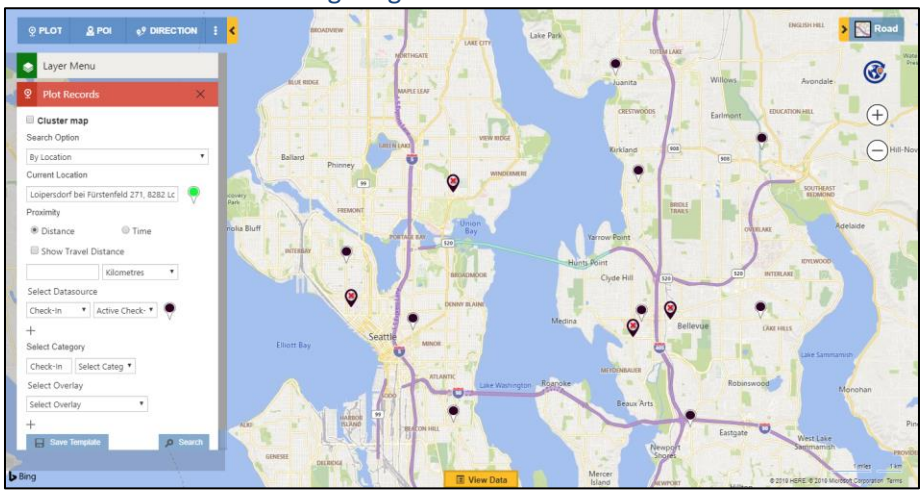
Resizable View data grid

Data grid can be dragged and expanded as well as collapsed for better viewing by users.



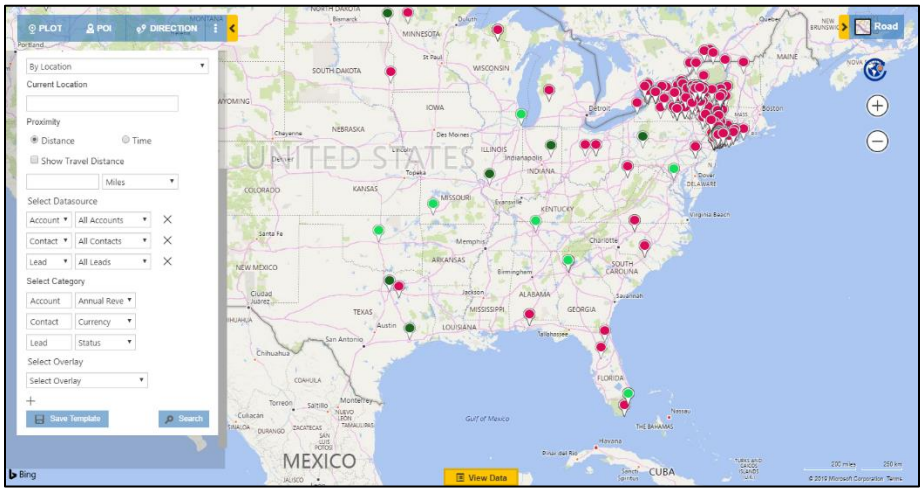
Check-In

Check-In feature enables users to register their arrival and departure time for the Check Points while navigating on field.



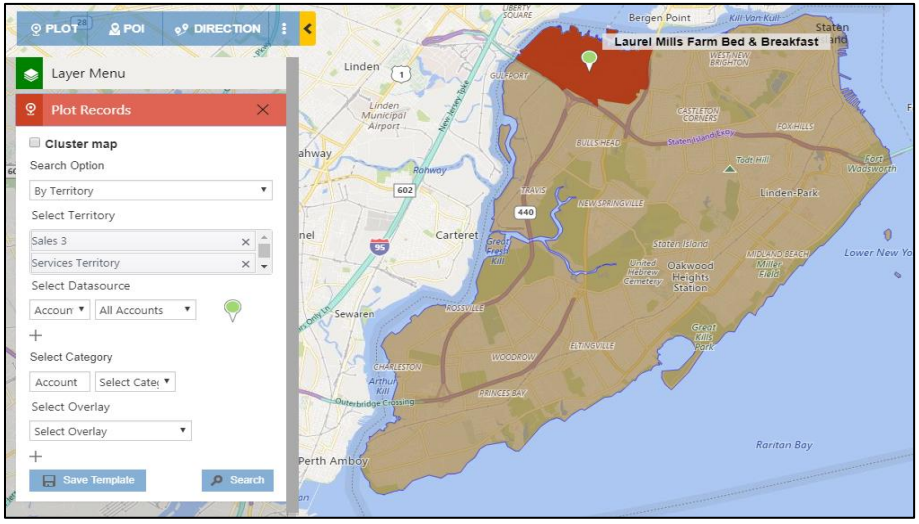
Multiple category

More than one category is supported. Users can choose one category each for three individual Entities.



Multiple Territory

Multiple territories can be assigned to a single record.

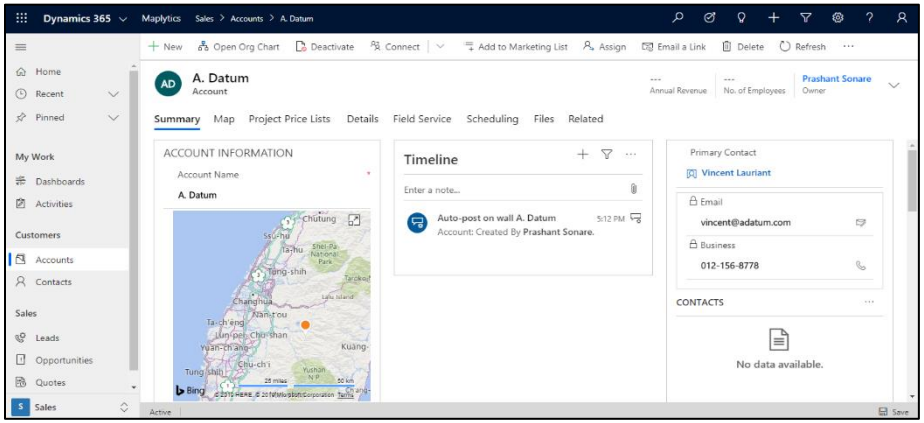


PowerApps Component Framework

User can add custom controls on fields or grids, which will help the user to view the respective records on the map on the record form or the entity grid.

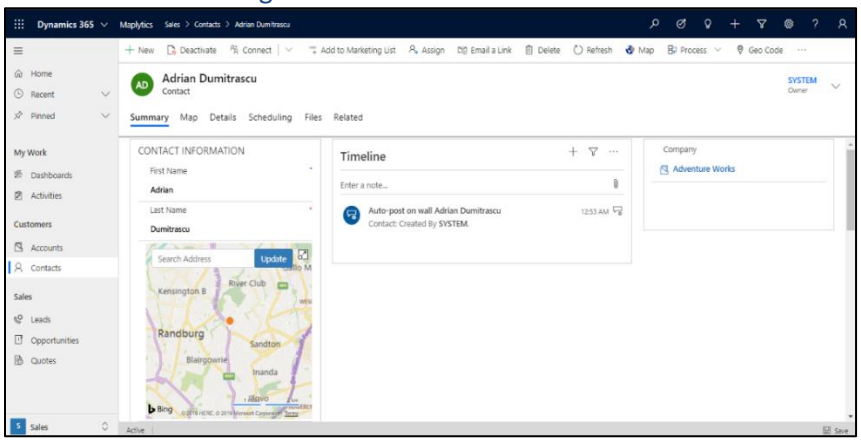
Map View Control for Record

User can view the respective record plotted on the map within the form. User can also view the Address and geo-coordinates on the hover of the pushpin.



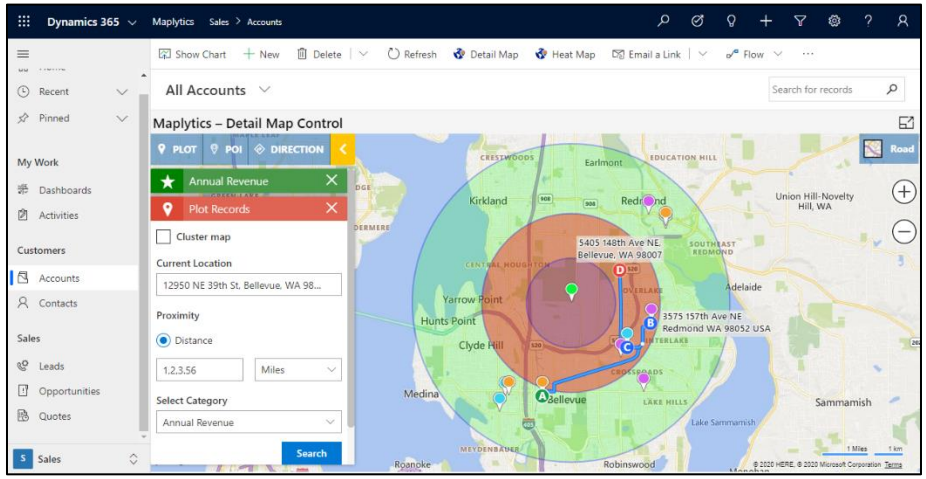
Map Edit Control for Record

User can view the respective record plotted on the map within the form. User can further drag the pushpin around and drop it on location to update the new Address and the geo-coordinates for the record.



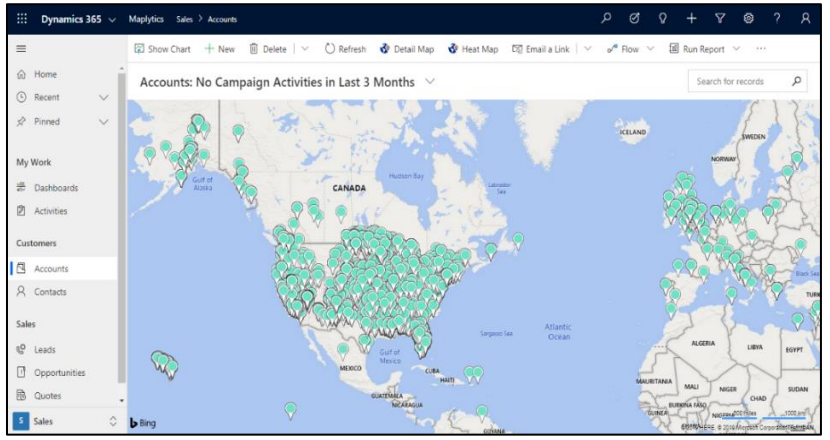
Detail Map Control

User can add this control to any entity or dashboard to visualize all of the records on a map. User can also perform Maplytics features like Proximity, Routing etc. using the plot card.



Map View Control for Dataset

User can visualize all of the records of the view or sub-grid on a map. User can further hover on the pushpins to view the information regarding the records.



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