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 Dynamics 365 8.2 and Above, On-Premises and Online, PowerApps and CDS
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
MULTI-LANGUAGE COMPATIBILITY

- Auto detects language set in your Dynamics 365/CRM
- Currently available for English, Spanish, German, French, Portuguese, and Turkish

Hello!
Merhaba!
Hola!
Hallo!
Bonjour!
Olá!
GEOCODE DATA

- Find Latitude & Longitude of your address data
- Locate Client geographically
- Geocode Millions of CRM Records
- Easy & interactive platform for geocoding records
• 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
• 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

Action Buttons:
- Change Owner
- Open Record Form
- Plot Related Record
- Run Workflow
- Define Activity Actions
• 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
Truck Routing

- Search for Shortest Travel Distance to required records based on driving by truck
- Create optimised route for truck
AUTO SCHEDULING

- Auto schedule appointment plan in few clicks
- Set preferences for the plan in Auto scheduling card
- Save appointments and the routes created
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 Difference, Intersection, Union, Union Aggregate, and Disjunctive Union.
Census data visualization

- Analyze census data to make the analysis even more powerful
- Categorize the census data as required
SHAPE LAYER INTEGRATION

• 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
- Click on POI icons or enter keyword to search for required Geo-tagged POI locations.
PCF Map Controls

Map View Control on Form

Map View Control on Dataset

Map Edit Control on Form

Detail Map Control
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