Application for Dynamics 365 Field Service Installation Guide

# Overview

This document provides information about installation and usage of the application “Glympse En Route extensions for Dynamics CRM Field Service”.

Throughout this document the term “Booking” will be used to mean a CRM “Bookable Resource Booking” record unless otherwise indicated.

# Configuration

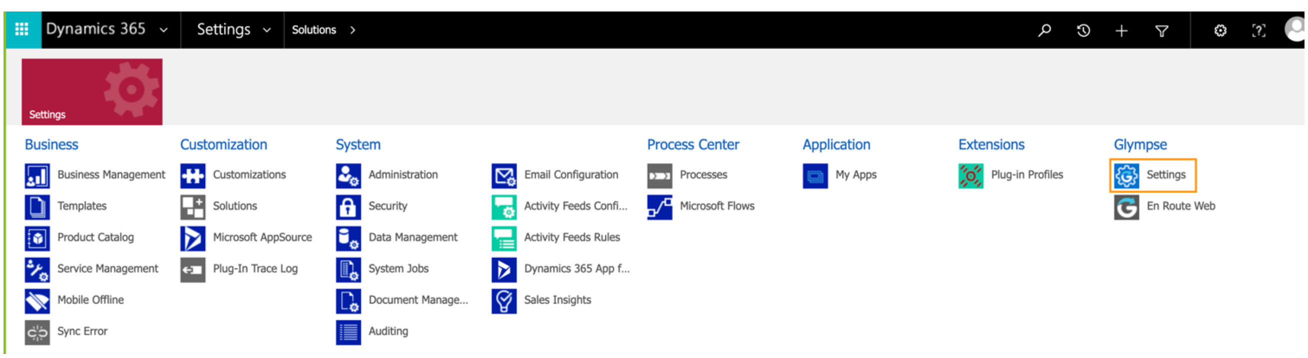
This section provides instructions for installing the application and configuring the CRM environment for Glympse.

## Install the Package

The Glympse application installs the following, confirm that they look intact:

- A modified version of the **Bookable Resource** form.
- A modified version of the **Bookable Resource Booking** form.
- A modified version of the **Booking Status** form.
- A custom **Glympse Settings** form.
- A **Glympse** button group on the application ribbon. To install the application:

1. Make a backup of your Dynamics instance before installing the Glympse application.
2. Select **Settings->Customization->Solutions** from the application ribbon, then select **Import** and browse to the Glympse application ZIP file.
3. Complete the import and ensure that no errors are shown in the dialog.
4. Confirm that a solution named **"EnRoute"** displays in the solutions list.
5. Select **Publish All Customizations** from the form ribbon.
6. Refresh the website (press Ctrl+F5 on most browsers).
7. Confirm that the entities listed at the top of this section are in CRM.



## Latitude / Longitude

The Glympse application prefers latitude and longitude values for tracking but will also discover the address in the related Work Order if there is no Latitude and/or Longitude in the Booking. See the **Glympse Task Creation** section for specific information.

To enable the capabilities of the **GeoCode** button on the Work Order form ribbon, select **Resource Scheduling->Settings->Administration->Scheduling Parameters** and make sure that **Connect to Maps** is set to "**Yes**" and the **Map Api Key** field is populated.

## Logging

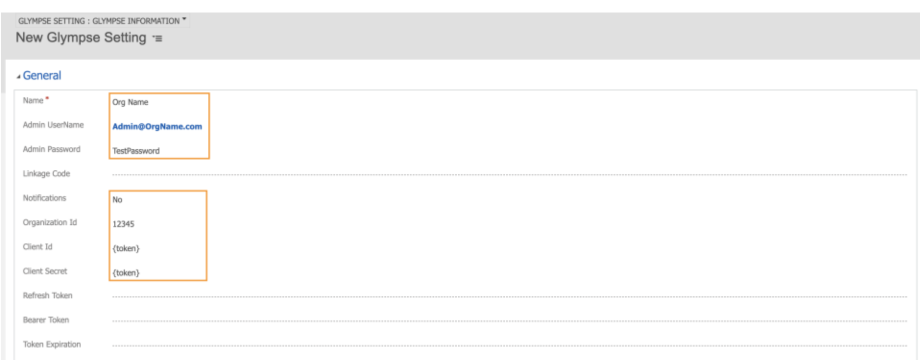
To debug any issues related to the Glympse applications, logging should be enabled as follows:

1. Go to **Settings->System->Administration->System Settings** and select the **Customization** tab
2. Open the dropdown for **Enable logging to plug-in trace log** and change to "**All**". Click **OK** to save.

## Configure Glympse Settings

To bind CRM to the Glympse API, you must enter API credentials from Glympse. Reach out to your Glympse representative to receive the below credentials.

1. From the CRM top ribbon, select **Settings->Advanced Settings->Settings->Glympse Settings**.
2. Select **New** from the form ribbon.
3. Enter the following Glympse Values:
   - Name (Glympse org name)
   - Admin Username
   - Admin Password
   - Organization ID
   - Client ID
   - Client Secret



4. Click **Save** on the form ribbon (not **Save and Close**) and wait for the record to save. Upon refresh, a Bearer token should appear. If not, please contact your Glympse representative.

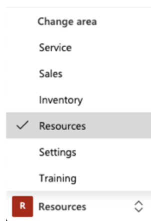
5. Glympse can optionally send email and/or SMS in-transit notifications to the contact person for the Booking (see Glympse Task Updates below). To enable this feature, set **Notifications** to "**Yes**" on this form.

6. Close the form.

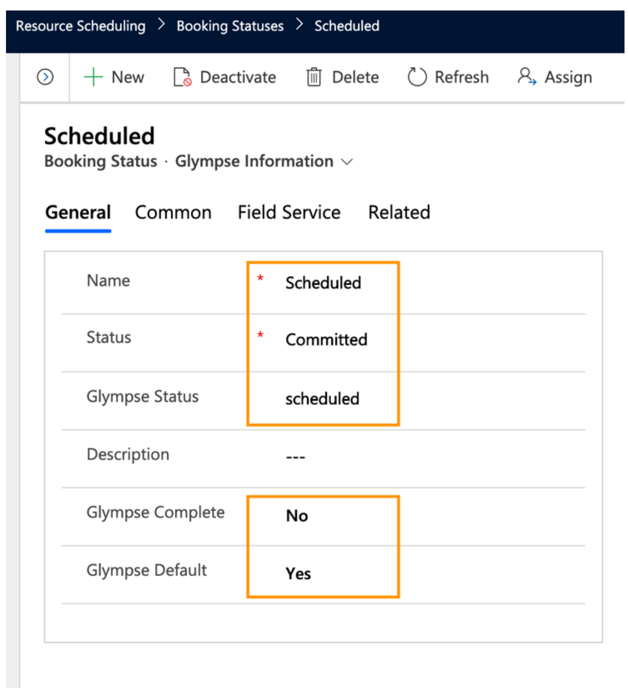
## Glympse Journey Phases

You must bind Glympse journey phases to CRM Booking Status values in order to trigger Glympse events:

1. On the application ribbon, select **Resources->Booking Statuses**.




2. Choose the appropriate **Booking Status** that will have a **Glympse Status** associated. For instance: "**Travelling**", which will normally have the Glympse status of "**live**".




3. Edit each status in the list as follows.

4. In the **Glympse Status** field, enter the string for the Glympse journey status from the table below that you want to be triggered when the status of a Booking record changes to the Booking Status shown the form. **NOTE:** There is no validation of the text entered; precise spelling is required. See the two tables that follow this list for guidance.

5. Set the **Glympse Complete** field to “**Yes**” to indicate that when this Booking Status is assigned to a Booking, the Glympse system should be notified that the journey is complete when the **Glympse Status** is sent.

6. Set the **Glympse Default** field to “**Yes**” to indicate that the **Glympse Status** you entered in this record maps to the journey phase that is set as the default for your organization; this prevents extra status change calls to the Glympse server. For example, when a new Glympse task is created on the server, your organization has assigned “**pre**” as the default journey phase. Thus, for each Booking Status record that maps to “**pre**”, you will set the **Glympse Default** field on this form to “**Yes**”. **NOTE:** Ensure that only **one Glympse Status** value is flagged as **Glympse Default**; however, that value may occur in more than one Booking Status.

These are the Glympse journey status values for the **Glympse Status** field:

- **scheduled**
  - Initial Phase, minimal information displayed to the customer. Normally for appointment confirmations
- **eta**
  - Day of Booking, prior to live location tracking
- **quasi**
  - Resource is out fulfilling Bookings, live location tracking enabled, obfuscated location of driver shared, live ETA calculations enabled
- **live**
  - Resource is on the way to specific booking, live location tracking enabled, exact location of driver shared, live ETA calculations enabled.
- **arrived**
  - Resource has arrived at the Booking destination. Location sharing disabled
- **completed**
  - Resource has completed the Booking. Feedback may be offered.
  - Check Glympse Complete
- **cancelled**
  - Booking has been cancelled. Location sharing disabled.
  - Check Glympse Complete
- **incomplete**
  - Resource was unable to complete the booking. Location sharing disabled.
  - Check Glympse Complete

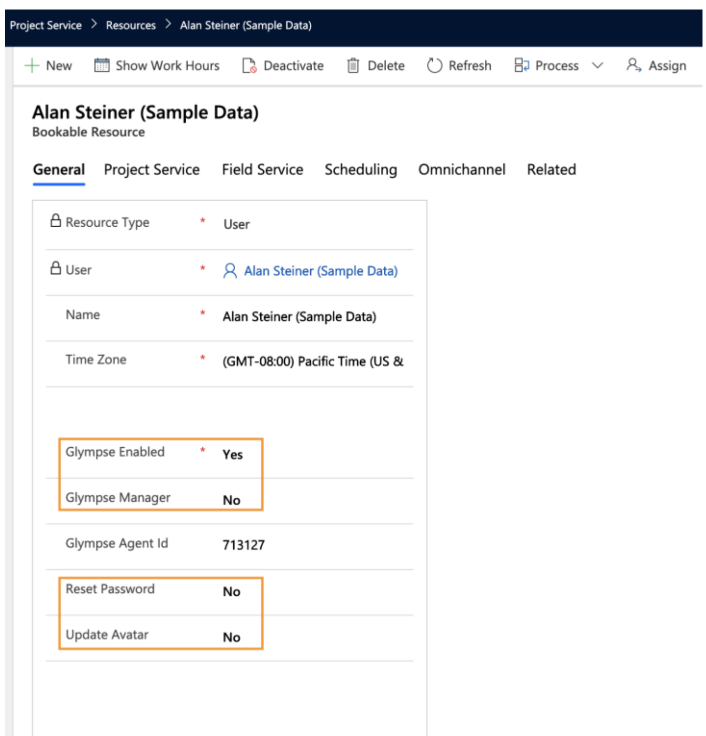
# Workflows

This section explains the workflows for the Glympse application.

## Identify Agents

A Glympse "**Agent**" is a CRM user that has been designated for tracking by Glympse, or a manager of the Glympse interaction. To configure your users for Glympse:

1. Select **Resources->Resources** from the application ribbon.
2. Edit a user or create a new resource of type "**User**".
3. Set one or both of these values to "**Yes**" to enable the user as a Glympse Agent: **Glympse Enabled** and/or **Glympse Manager**.
4. Click **Save** (not **Save and Close**) and wait for the save to complete.
5. Once saved, the **Glympse Agent Id** form field will be populated. If it is still blank after saving, an error has occurred, contact Glympse.



## Glympse Task Creation

The Glympse application communicates with the Glympse server when a Booking is created to generate a new Glympse task record. When you create and save a new Booking (either from the Schedule Board or from the Booking form directly), the application logic is as follows:

1. Gets the Agent Id (i.e. the Bookable Resource) and the delivery times (Start Time, End Time, Duration) from the Booking.

2. Gets the Latitude and Longitude from the Booking.

3. Finds the parent Work Order for the Booking, if any.

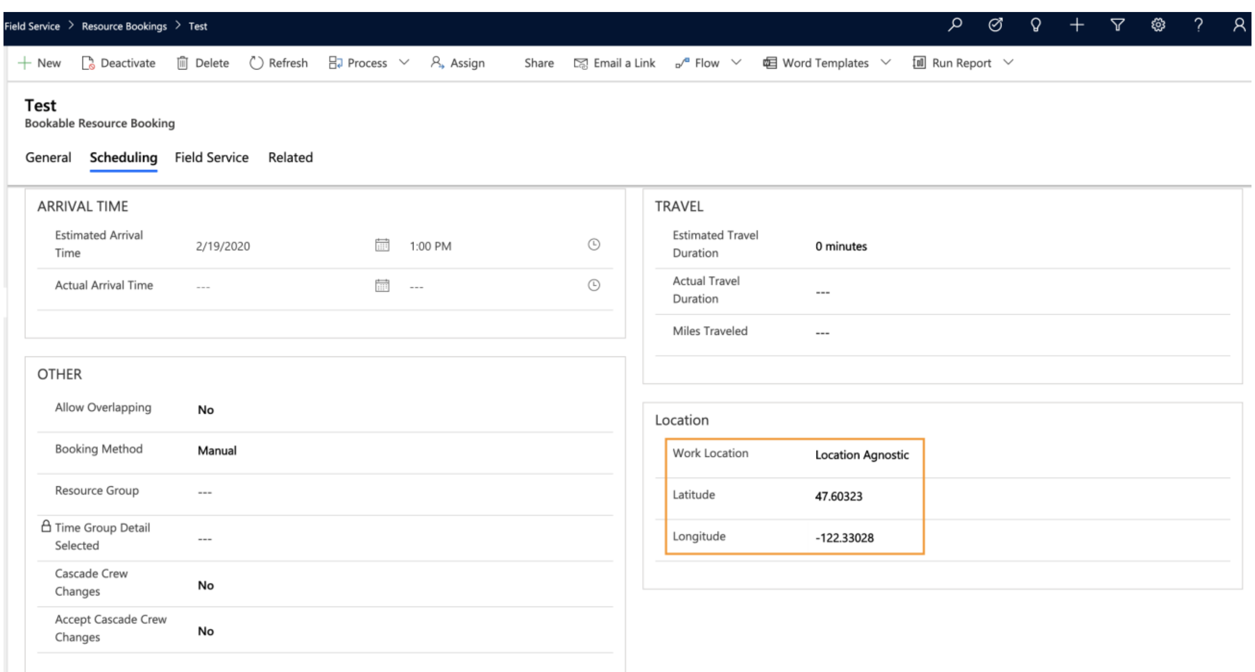
4. Gets Address 1 from the Work Order, if any.

5. Gets the Latitude and Longitude from the Work Order, if any, and uses them to replace the values from step 1 above.

6. Sends these values to the Glympse API to create a Glympse Task.

7. Returns the Glympse Task Id and Glympse URL if successful, saves these values in the Booking record, and displays them on the Booking form.

**NOTE:** After Address 1 or Latitude and Longitude from the Work Order are sent to the Glympse server, changes to these values will not be propagated to the Glympse task. However, you can edit the Latitude and Longitude directly in the Booking form, which will update these values in the Glympse Task.



In order for a new Booking record to create a new Glympse task, all of these requirements must be met:

1. The Booking must be assigned to a CRM user that is identified as a Glympse Agent (see the Identify Agents section).

2. The Booking record must have a value in the **Name** field. This field is populated automatically from the Schedule Board, but for a Booking created with the form it must be entered manually, it is not a required field for CRM.

3. As described in the logic flow above, one of these must be available in the Booking data:

- **Work Order Address1**

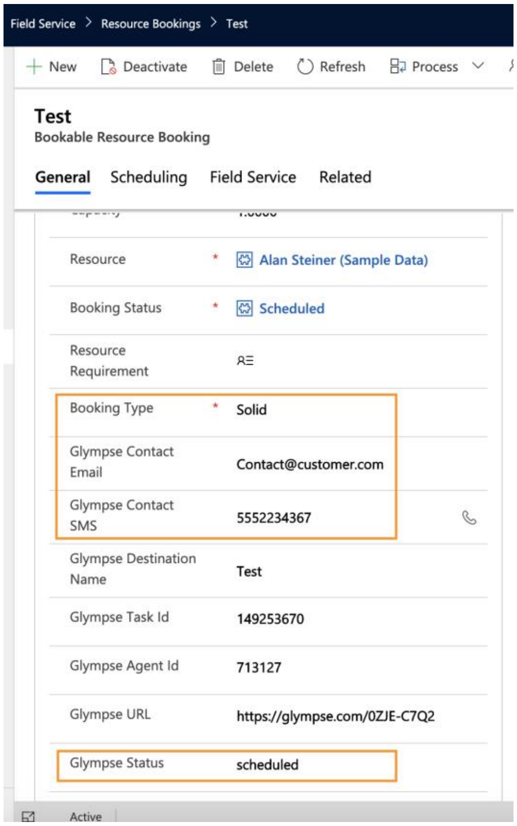
- **Work Order Latitude / Longitude**

- **Booking Latitude / Longitude**

If the three preceding criteria are met and a Booking record has been saved (automatically on the Schedule Board or manually on the form), the application will add these values to the Booking record if contact with the Glympse server was successful: **Glympse Destination Name, Glympse Task Id, Glympse Agent Id, Glympse URL,** and **Glympse Status**. If these are still blank after saving, an error has occurred, contact Glympse.

If notifications are enabled (see Glympse Linkage Code and Settings above), the Glympse server will automatically send email and/or SMS notifications to the contact person for the Booking as specified in the **Glympse Contact Email** and/or **Glympse Contact SMS** fields.

The **Glympse URL** field is populated by the application with the link to the Glympse journey map; this link can be used to track the journey while the agent is traveling.



## Glympse Task Updates

The Glympse journey status is updated based upon changes to a Booking record using the correlation between a **Booking Status** and a **Glympse Status** journey phase (see Journey Phases above).
The Glympse server is notified and the Glympse task updated whenever one of these values in the Booking is changed and saved:

- **Start Time**
- **End Time**
- **Duration**
- **Resource**
- **Booking Status**
- **Latitude**
- **Longitude**

Updates to the **Booking Status** field in the form or on the Schedule Board will send an updated journey phase to the Glympse server as defined in Glympse Task Updates.

# Maintenance

There are two maintenance tasks available for a Glympse Agent.

## Agent Password

To reset the password for the agent in the Glympse system:

1. Open the **Bookable Resource** form for the agent.
2. Change the **Reset Password** field to "**Reset**" and save.
3. The user will receive a password reset email.
4. The **Reset Password** field will be reset back to "**No**" by the application when the save is complete. If it is still showing "**Reset**" after saving, an error has occurred, contact Glympse.

## Agent Avatar

NOTE: These steps assume that a user has already been assigned an avatar image on the user's profile under **Settings->System->Security->Users**.

To add or change an avatar image for an agent on the Glympse server:

1. Open the **Bookable Resource** form for the agent.

2. Change the **Update Avatar** field to “**Update**” and save.

3. The **Update Avatar** field will be reset back to “**No**” by the application when the save is complete. If it is still showing “**Update**” after saving, an error has occurred, contact Glympse.

## En Route Mobile Application

Once a Glympse task is created, started, and assigned to a Glympse Enabled resource, the resource will be able to change the Booking Status via Resco Mobile or a similar solution allowing them to do so. Once the status has been changed to a status mapped to Glympse’s Live phase, the Resource will be able to power the Glympse Live Map by using En Route Mobile. To install En Route Mobile:

1. Download En Route Mobile via iTunes or Play Store

2. Log in using the Glympse credentials that are sent via the Glympse Enable action in Dynamics

3. Ensure that location settings are set to share with Glympse En Route Mobile

There is no need to use the En Route Mobile Application to manage Glympse tasks that appear in the application as they will be controlled by Booking Status changes made by a mobile CRM application.