# Maptaskr
# Installation and Configuration Guide

Version: 2.0.4.5

## 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
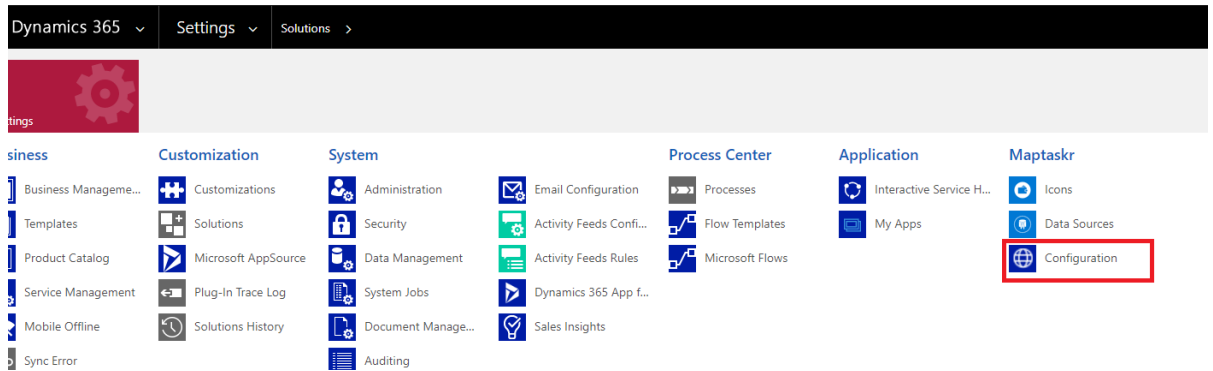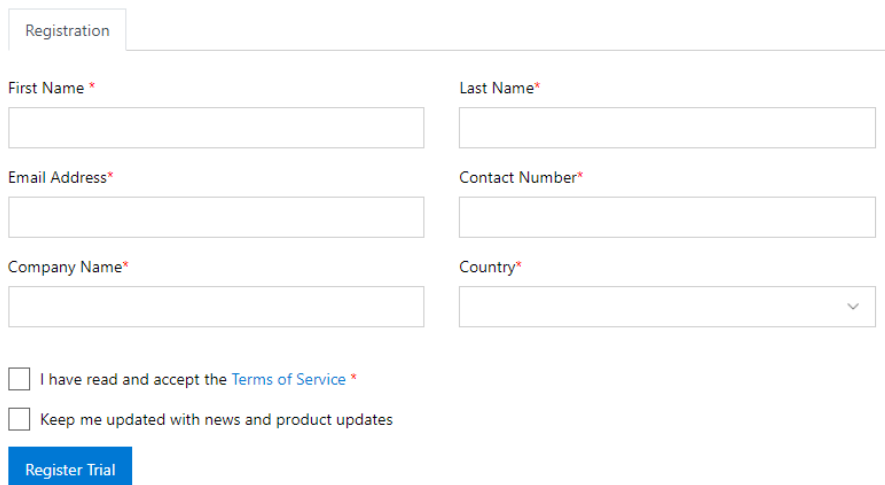3. Navigate to Settings -> Maptaskr -> Configuration

*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 the email provided.

*Figure 2: Registration*

5. Paste the license key and click 'Activate'



*Figure 3: License Activation*

Upon license activation, the license details are reflected:



*Figure 4: License Details*

# Licenses

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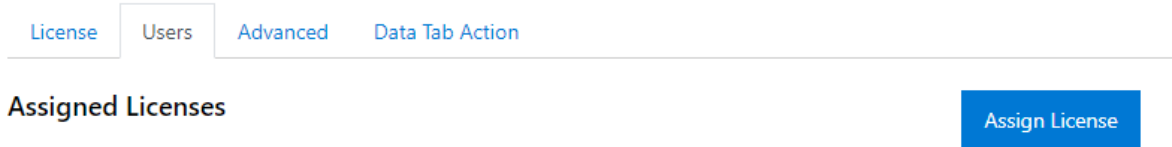


*Figure 5: Assign License*

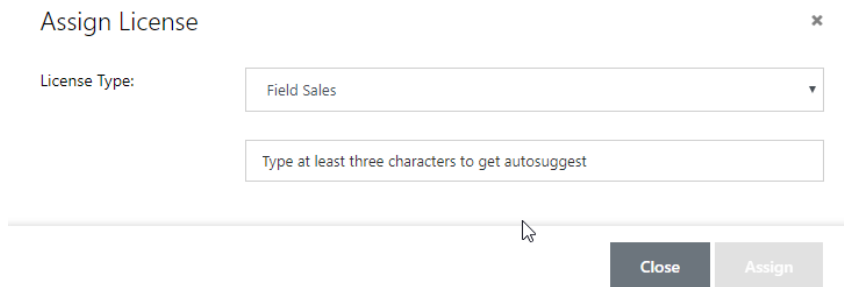1. Assign Maptaskr license type to user or group



*Figure 6: License Assignment*

2. Maptaskr Admin: Users that need the ability to create Global Queries require the "Maptaskr Admin" role assigned.
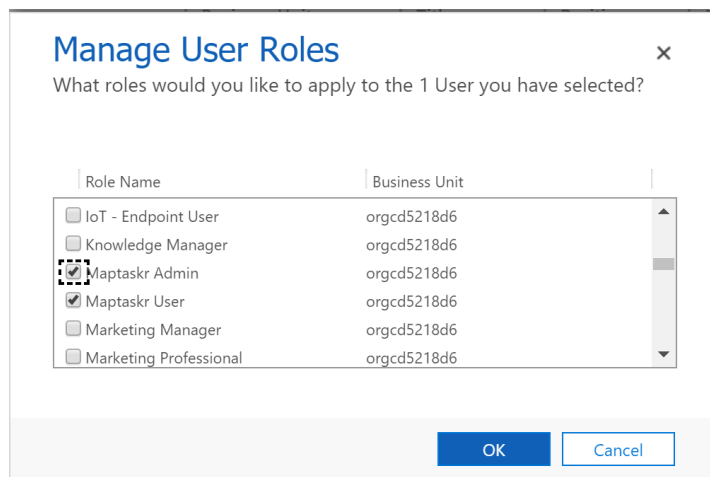


*Figure 7: Maptaskr Admin Role*

# Advanced Settings

Additional options can be set in the Advanced tab.



*Figure 8: Advanced Settings*

**Advanced Settings**:

    a.   Base Map: Select a different Base Map

    b.   Base Map Type: Select a Base Map style for Bing Map

c. Default View: Select a default view of Map or Satellite when the map is loaded

d. Base Map Key: Insert Bing Map Key
   **New Bing Map key can be acquired from the [Bing Maps Portal](#) for test or production purposes.**

e. 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.**

f. Distance: Select distance type of Kilometres or Miles.

**Search Settings**:

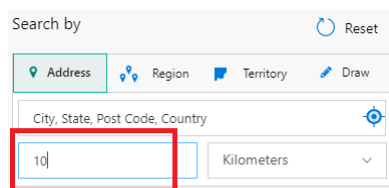a. Default Location Within: Set a default radius value when searching by current location



*Figure 9: Default Location*

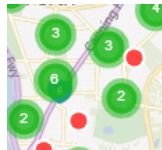b. Cluster Level: Set a value for pins when grouped at different zoom levels



*Figure 10: Cluster Level*

c. Default Tab Selection: Set the default tab to be selected when the map loads

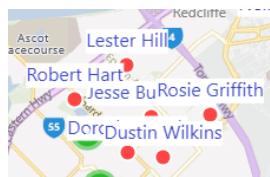d. Display Pin's Label: Select to enable Pin label's when displayed on the map



*Figure 11: Pin Labels*

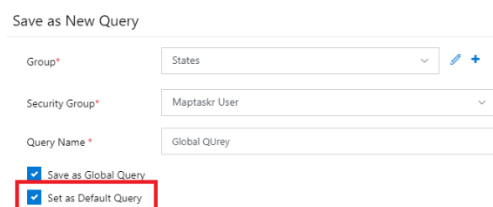e. Load Default Query: Select to enable default query option for saved global queries.



*Figure 12: Default Query*

f. Load Custom Icon: Select to enable custom icons for pins (Default option is the colour picker) – Refer to the Icons section in this document.
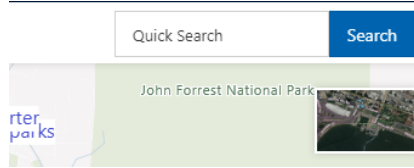
g. Enable Quick Search: Select to display Quick Search


*Figure 13: Quick Search*

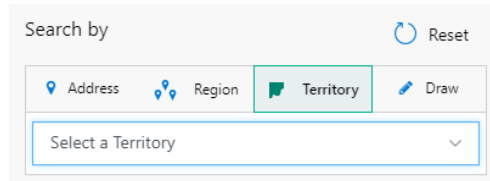h. Enable Territory: Select to enable search by Territory option


*Figure 14: Search by Territory*

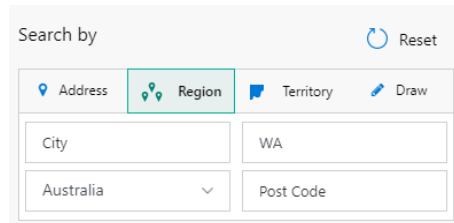i. Enable Region: Select to enable search by Region option


*Figure 15: Search by Region*
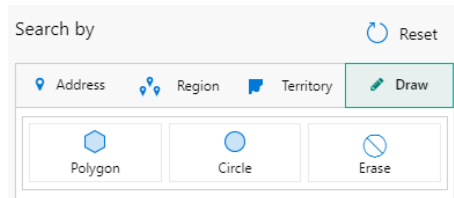
j. Enable Draw: Select to enable search by Drawing a shape


*Figure 16: Search by Draw*

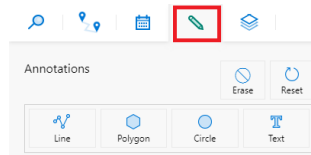k. Enable Annotations Tab: Select to enable Annotations Tab


*Figure 17: Annotations Tab*

l. Enable Library Tab: Select to enable Library Tab


*Figure 18: Library Tab*

**Infobox Settings**:

    a.    Change Appointment Style: Select to enable the display style for Appointments when displayed in Infobox. The style includes the ability to include additional properties in addition to the title.

        When enabled, the Appointment data source includes the "Appointment Tab Property" Tab, where additional properties can be added:
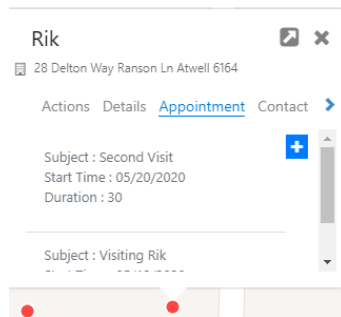




*Figure 19: Appointment Style*

**Power BI Settings**:

    a.    Add client ID to enable Power BI reports feature

**Layer Proxy Settings:**

    a.    Add Proxy URL to enable layer communication over a proxy server

# Data Tab Actions:

The following actions are visible under the data tab, that can be toggled on/off.

| Action | Active |
|---|---|
| Add to Route | ☑ |
| Change Owner | ☑ |
| Add to Marketing List | ☑ |
| Export to Excel | ☑ |
| Send Email | ☑ |
| Export to Excel | ☐ |
| Create Activities | ☐ |
| Execute Workflow | ☐ |

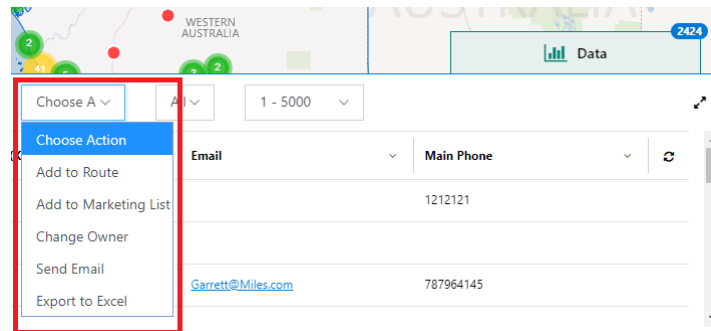*Figure 20: Data Tab Actions - Options*



*Figure 21: Data Tab Actions*

# Data Source Mappings

Data Sources are the key component within Maptaskr, that is used to set up the mapping to entities that are used for search and other activities. Maptaskr includes default data source mappings, these can be updated as required.

The default data source mapping includes Accounts, Contacts and Leads entities. To add or modify the data source mappings:

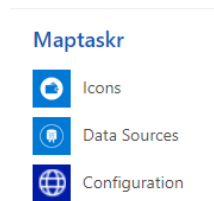1. Navigate to Settings ➜ Maptaskr ➜ Data Sources



*Figure 22: Maptaskr settings menu items*

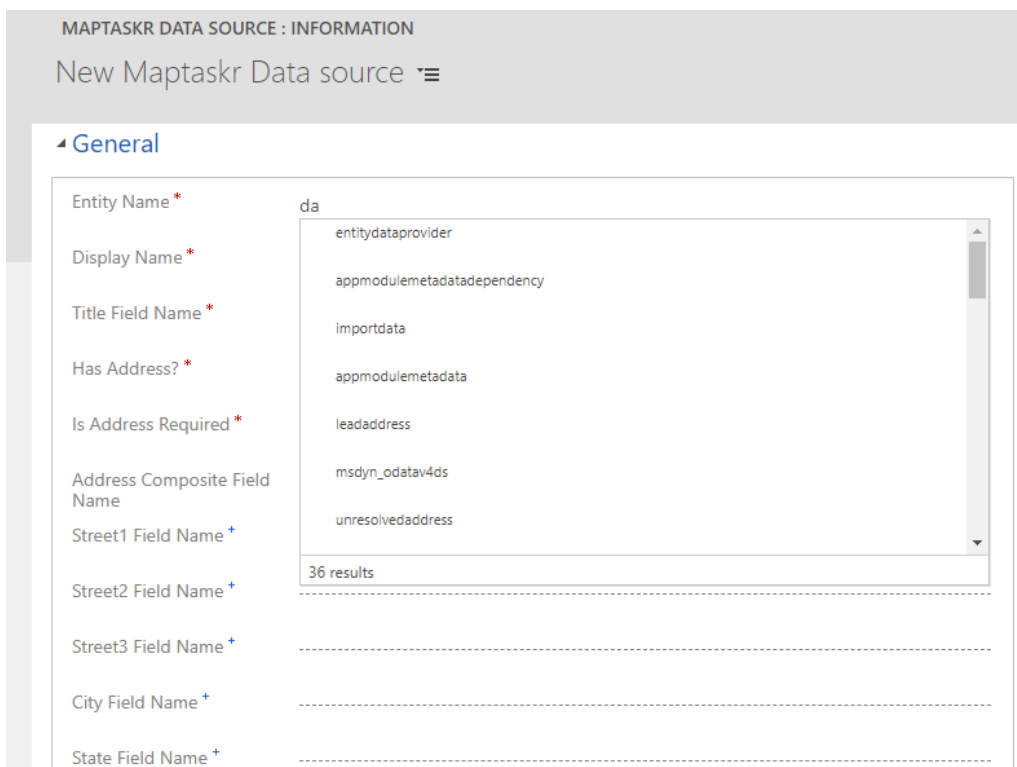2. To add a new entity, click on NEW and fill the required field mappings.
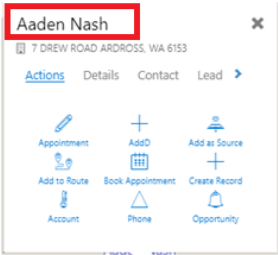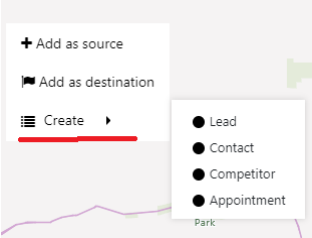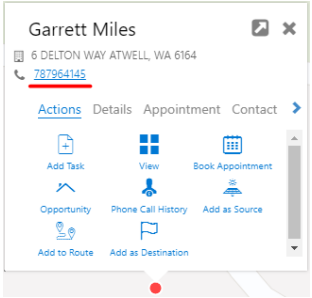


*Figure 23: New Data source*
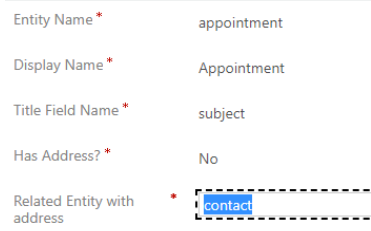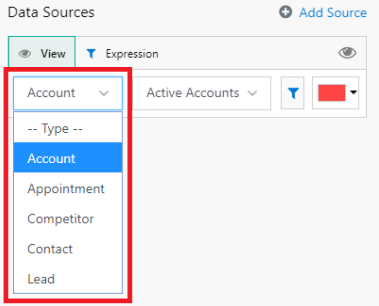
The following table list the attributes for data source:

| Field | Description |
| --- | --- |
| **Entity Name** | The internal name of the entity. |
| **Display Name** | The display name for the data source |
| **Title Field Name** | The Title field displayed in the Infobox  |
| **Has Address** | The option to determine whether the entity has address attributes. If the entity doesn't have address fields select No.<br><br>If No the related entity with address can be selected. For example, you want to search appointments based on contact's location, set the Has Address to No and select Contact in the "Related Entity with Address"  |
| **Related Entity with address** | Refer above |
| **Is Address Required** | Entities that have full address attributes like Street, City can be mapped. For custom entities that do not have address attributes, the field can be set to no. |
| **Enabled** | Whether the data source is enabled within Maptaskr search |

| | |
|---|---|
| **Allow Relationship?** | Enable this option to set up the relationship between configured data sources. E.g. Accounts with Appointments |
| **Allow in Content Menu?** | Enable this option if the data source needs to be visible in the context menu<br><br> |
| **Allow Invalid Address?** | Enable to include results that do not have valid address attributes (latitude & longitude). Invalid results are included in the data tab results |
| **Show Phone Number in Infobox?** | Enable to include the phone number (if exists) below the main header in the Infobox.<br><br> |
| **Show Notes** | Enable to include Notes (if exists) as a tab within the Infobox |
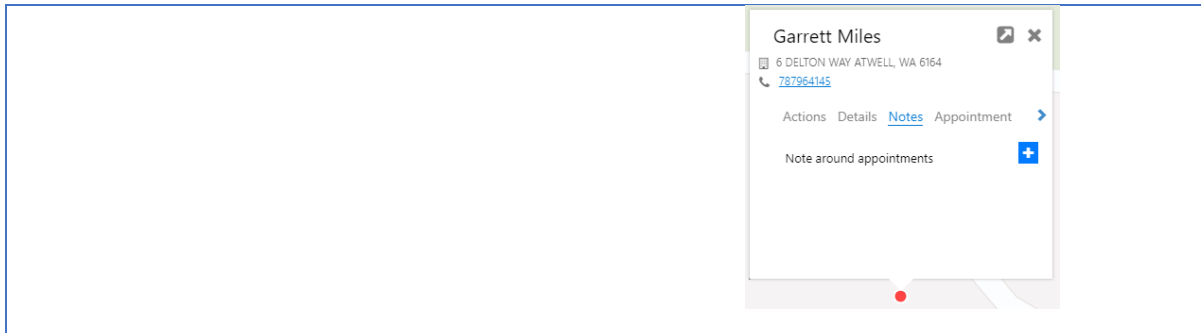
## Relationship List

When the "Allow Relationship" setting (above) is enabled, entities can be configured to include related entities.

The related entities can be set to list that is included as a tab in Infobox or can be set map that requires the "Related Records" action to be enabled in the Infobox Actions
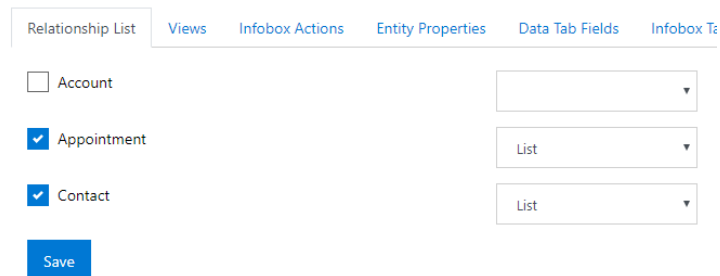


*Figure 24: Data source – Relationship list*

## Views

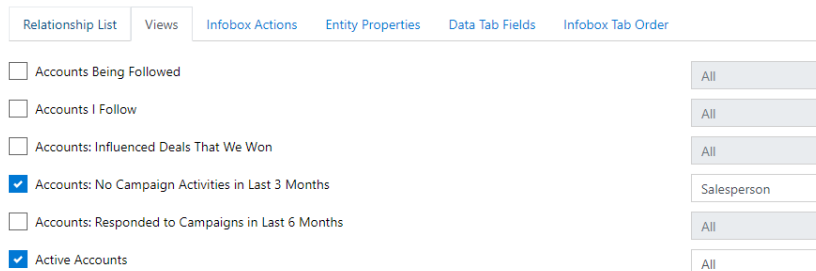The views tab is used to configure the Views that are available for users, this includes setting the view for specific security groups.



*Figure 25: Views*

## Infobox Actions

Data sources can include specific actions that the user can take on individual records. The Infobox actions tab is used to configure the actions, including adding new ones.

*Figure 26: Infobox Actions*

## Entity Properties

Entity properties are the fields visible in the detail tab in the Infobox. New properties can be added that are specific to the entity and can be for specific security groups.



*Figure 27: Data source – Entity Properties*

## Data Tab Fields

Data Tab includes fields visible in the data tab section within Maptaskr. New properties can be added that are specific to the entity and can be for specific security groups.



*Figure 28: Data Tab Fields*

## Icons

Push Pins:

Maptaskr by default includes the colour picker when searching/displaying results on the map.
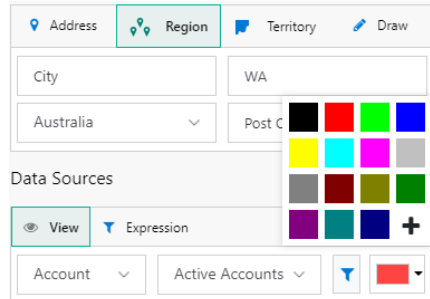


*Figure 29: Colour Picker*

This can be changed under Maptaskr Configuration -> Search Settings -> "Load Custom Icon". When enabled the colour picker is replaced with default push pins included in the Icons library.
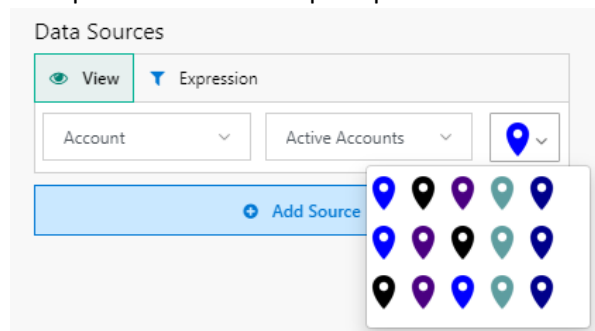


*Figure 30: Push Pin*

To add custom icons to the collection

1. Navigate to Settings -> Maptaskr -> Icons
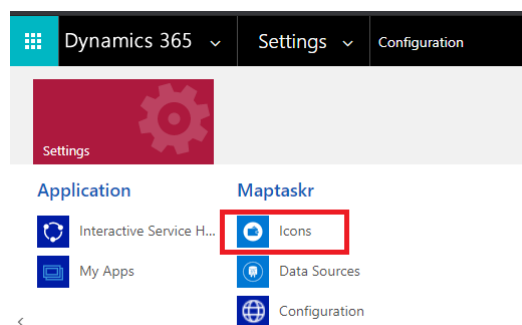


*Figure 31: Icons*

2. Click on 'New' in the ribbon
3. Enter Name, Icon Type -> Push Pin

15

4. Save the record
5. Select the Icon Size
6. Click on the Notes field
7. Click on the Choose File button and upload an image representing the icon type.

**Entity Properties:**

Icons with type set as "Entity Property" are available for properties that are Boolean type and are displayed as icons with Details section of the Infobox.
E.g. The below property has the option of "Badge", upon selection, the Icons of type Entity Property can be selected.



*Figure 32: Entity Properties Icon*

**Object Library**:
Icons with type set as "Object Library" are available under Annotations tab -> Object Library.
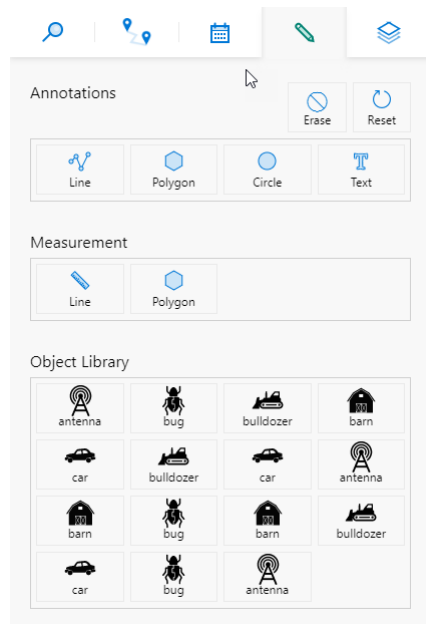


*Figure 33: Object Library*

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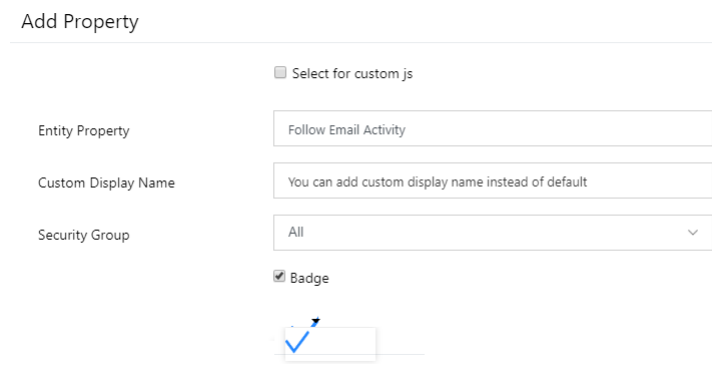
To run geocoding on existing addresses, navigate to the Entity, select one or more records, click on 'More Commands' and 'Run Workflow'



*Figure 34: 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 35: Geocoding Workflow*

![maptaskr logo]
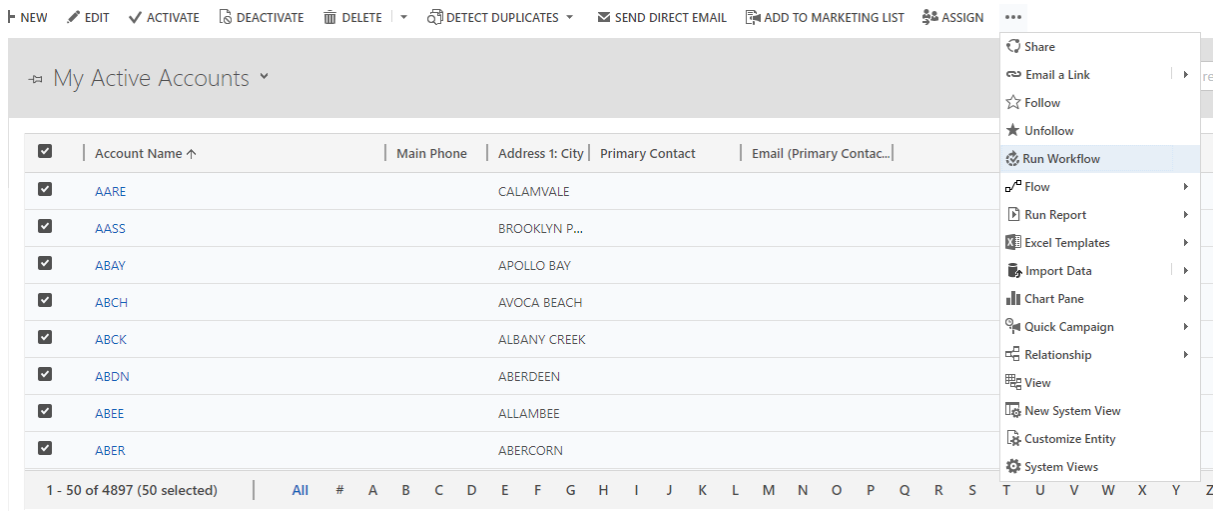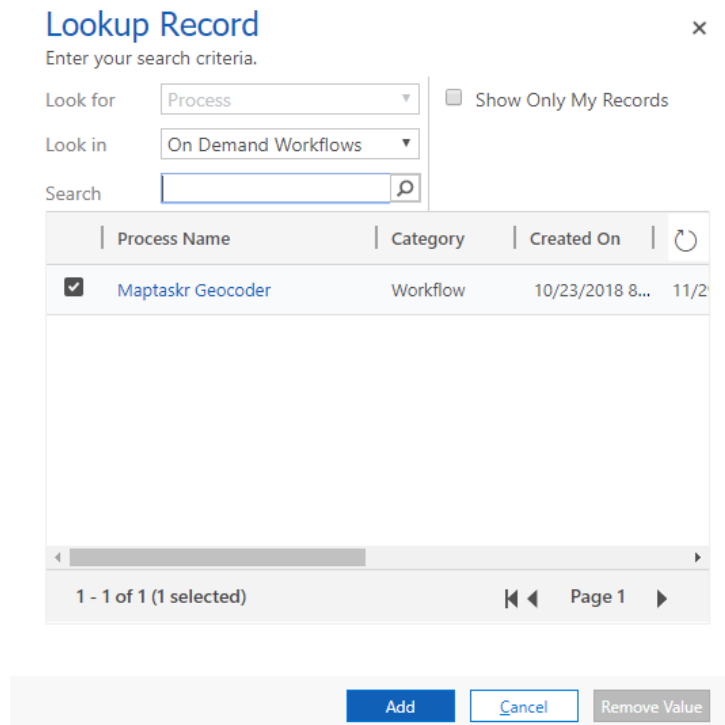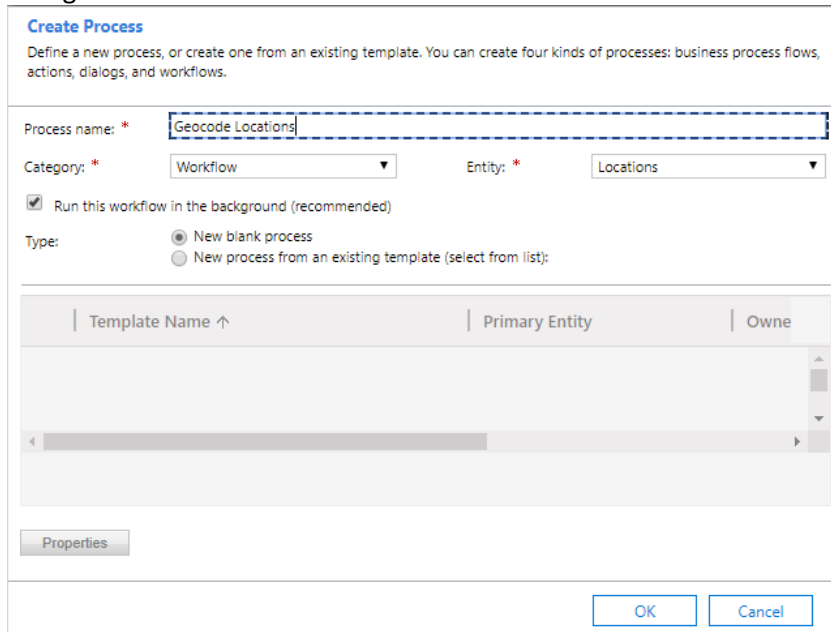
## Geocoding Custom Entities

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.



*Figure 36: 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
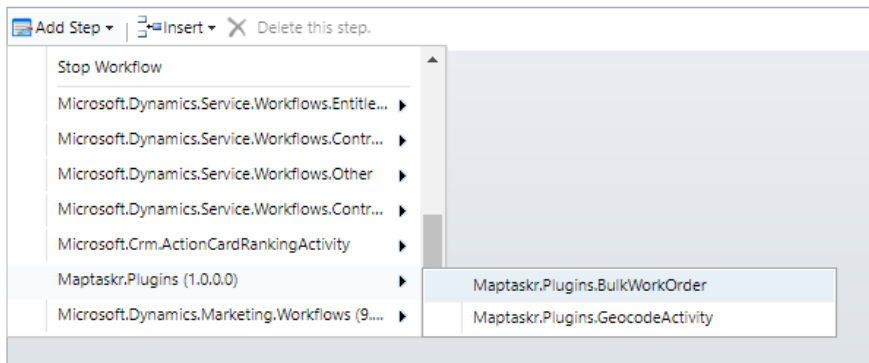
*Figure 37: Select Process*

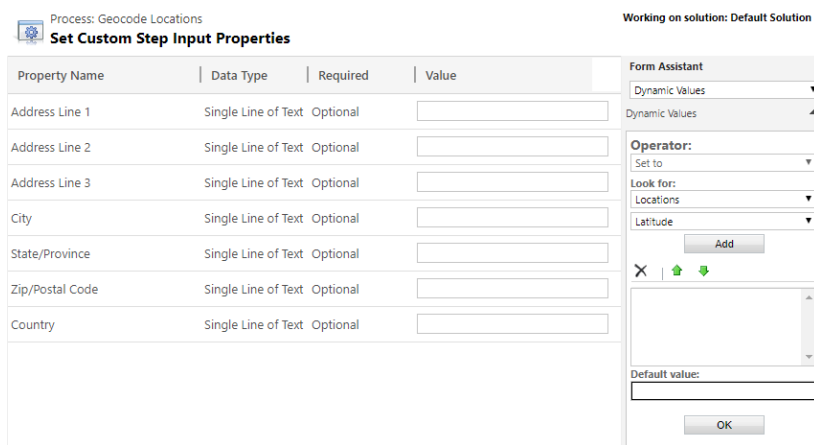d. Set the address parameter by clicking on Set Properties for the workflow and save and close the window.



*Figure 38: 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.
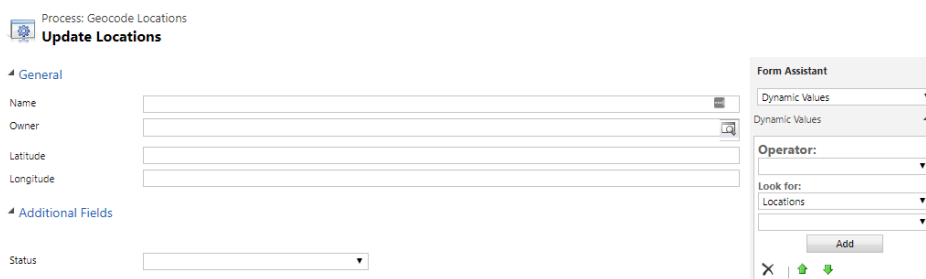


*Figure 39: Set Outputs*

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