Dynamica Google Maps Integration V2 Solution E2E Scenario

Primary Persona:	CRM Admin, CRM User
Configuration Settings	Client: Web Client (Browsers: Chrome, Firefox, Edge); Google Maps API; CRM: 365;
Problem / Opportunity Statement:	Google Maps is the most popular mapping service. It is useful to be able to not only display the location of your contacts, accounts, leads, and opportunities on a Google map, but also configure your filters directly on the map, and save them in the system. Dynamica Google Maps Integration V2 is a functional Google map integration solution that makes it easy to display coordinates on a Google Map. Google Maps are available in the menu on the new area named Google Maps Integration V2. In this solution, you can work with all OOB entities, as well as with custom entities. You can filter entities by system and custom views, and, also by location on the map.
Pain Points:	Hard to visualize locations of the records knowing only their addresses without seeing it on map. Hard to understand where, how far and how many leads, contacts, accounts or opportunities do you have. No Dynamics 365 solution that allows to integrate with Google Maps to show records coordinates on the Google Map.
User Goals:	Be able to see and to work with the records coordinates on Google Maps without leaving Dynamics 365.
Business Goals:	Show records coordinates on the Google Map to better Dynamics 365 data visualization and faster analyzing. Understand where and how far the leads, contacts, accounts, or opportunities are located. A clear understanding of how many the leads, contacts, accounts, or opportunities are in different locations. Filter the records by the fields and coordinates on the map.
Triggers:	**Google Maps Configuration steps (Admin):** 1. Go to the **Settings** -> **Security** -> **Security Roles**. Open user role, which needs to have access to the configuration and settings (admin role). Go to the **Custom Entities** tab and give access to create, update, and delete for **Dynamica Settings** and **Saved Search** entities.

	2. *Open user role, which needs to have access only to the solution in the model-driven app (common user). Go to the **Custom Entities** tab and give access to read for **Dynamica Settings** entity and to create, update, and delete **Saved Search** entity.* *It is recommended to give access to common users to work only with their own records.* 3. *Open **Settings** -> **Solutions** and open **Dynamica Google Maps Integration V2** solution.* 4. *Go to the **Configuration** page. Copy your **Google Maps API key** into appropriate field.* 5. *Click to the **Add Google Maps to Menu** button and choose the Model-Driven application, in which you want to add the Google Maps Integration solution. Click to the **Add Menu Item** button and close the window.* 6. *Select all entities that can be searched on the map. The Search on the top of the tab can be used for searching the entities.* 7. *Select in each chosen entity 1 field with the **Longitude** and 1 field with the **Latitude**.* 8. *Select in **Part of Address** all address fields that will be searched on the map (country, city, street, etc.). Or you can choose 1 composite field, for example, Address 1.* 9. *Select in the **Map Tooltip** all the fields that you need to be displayed in the **Results**, when you click on the marker on the map.* 10. *After all entities and their parameters are selected, click on the **Run Geocoding** button.* 11. *In the modal window, that appears, the selected records and their number are visible. Click **Run Geocoding**.* 12. *After geocoding is completed, close the window.* 13. *After finishing the settings, click the **Save** button and go to the application.* 14. *Change the area to the **Google Maps V2**.*
Narrative Description (e.g., plans, evaluation, actions, objects, context, events):	The trial version works only for 1 month. Free Version of the solution (up to 10 users) has a notification that this is a trial or free version of the solution. User must generate Google Maps API key and copy it into solution's configuration.

Detailed Steps	**1. How to create the new search.** *1.1. Click to the **DNL Google Maps V2.*** *1.2. Open **Search Parameters** tab.* *1.3. Chose the **Search Entity** from the drop-down list.* *1.4. Chose the color of the marker.* *1.5. Chose the View from drop-down list.* *1.6. Add the field for filter using the **Add Search Field** button.* *1.7. Add the new **Search Entity** using the **Add Search Entity** button.* *1.8. After completing Search Parameters, click **Results.*** **2. How to create the new search and save it.** *2.1. Click to the **DNL Google Maps V2.*** *2.2. Open **Search Parameters** tab.* *2.3. Chose the **Search Entity** from the drop-down list.* *2.4. Chose the color of the marker.* *2.5. Chose the View from drop-down list.* *2.6. Add the field for filter using the **Add Search Field** button.* *2.7. Add the new **Search Entity** using the **Add Search Entity** button.* *2.8. After completing Search Parameters, click **Save.*** *2.9. Type the new name in the modal window.* *2.10. Select **Is Default Search** if needed.* *2.11. Click **Save.*** **3. How to open existing search.** *3.1. Change area to the **DNL Google Maps V2.*** *3.2. Open **Search Parameters** tab.* *3.3. Click to the **Open Existing Search button.*** *3.4. In the window on the right type the name to search or press Enter to browse.* *3.5. Chose the **Saved Search** from the list.* *3.6. Click to **Add** button.* **4. How to build a route.** *4.1. Open **Results**.* *4.2. Right-click on the markers on the map. Select **Add to Route**.* *4.3. The panel that appeared on the right contains the coordinates of the added points and buttons for copying and sending links to this route.* *4.4. To open the new route in the **Google Maps** application, click to the **Route Link**.* *4.5. To copy to the clipboard a link with this route, click on the copy icon.* *4.6. To send this route by email, click on the on the envelope.*
Success Metrics:	Coordinates of the search entities from the selected views are shown on the map by markers with the corresponding colors (records must have addresses).