Dynamica Google Maps Integration V2 User Guide

Contents

Overview

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.

Dynamic Google Maps 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.
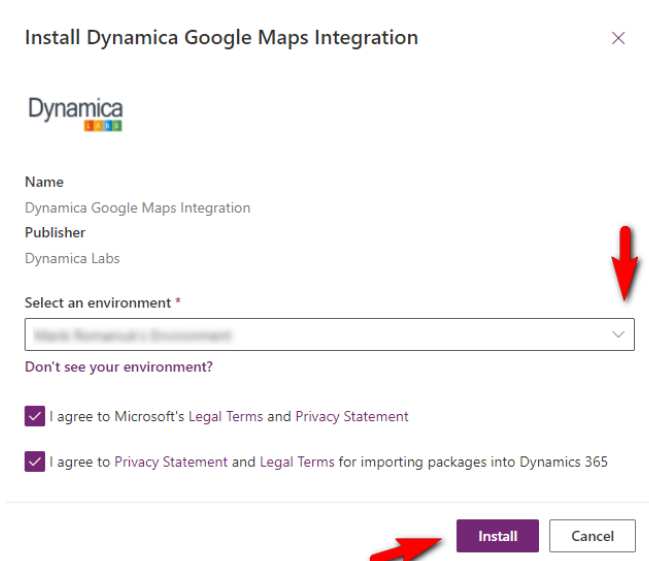
Dynamica Google Maps Integration solution installation

There are a few simple steps you need to take to install **Dynamica Google Maps Integration V2** solution on your Dynamics:

1. Press "Get it now" button.
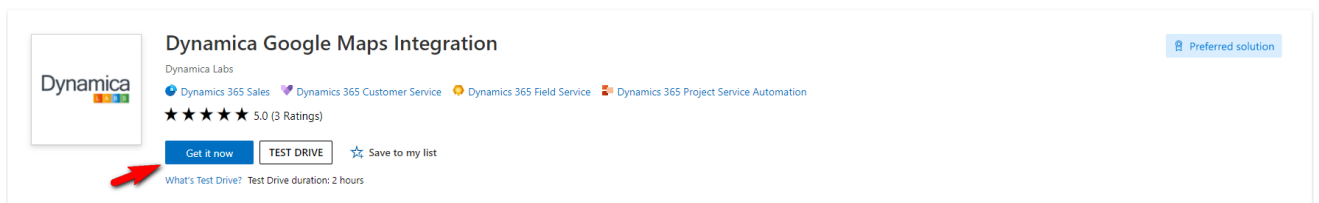
2. Select your environment and press "Install" button.

Google Maps API Configuration

In order to use Google Maps in Dynamics 365 - Google Maps **Directions API, Geocoding API** and **Maps JavaScript API** must be enabled. Then **Google Maps API Key** can be generated.

To do that:

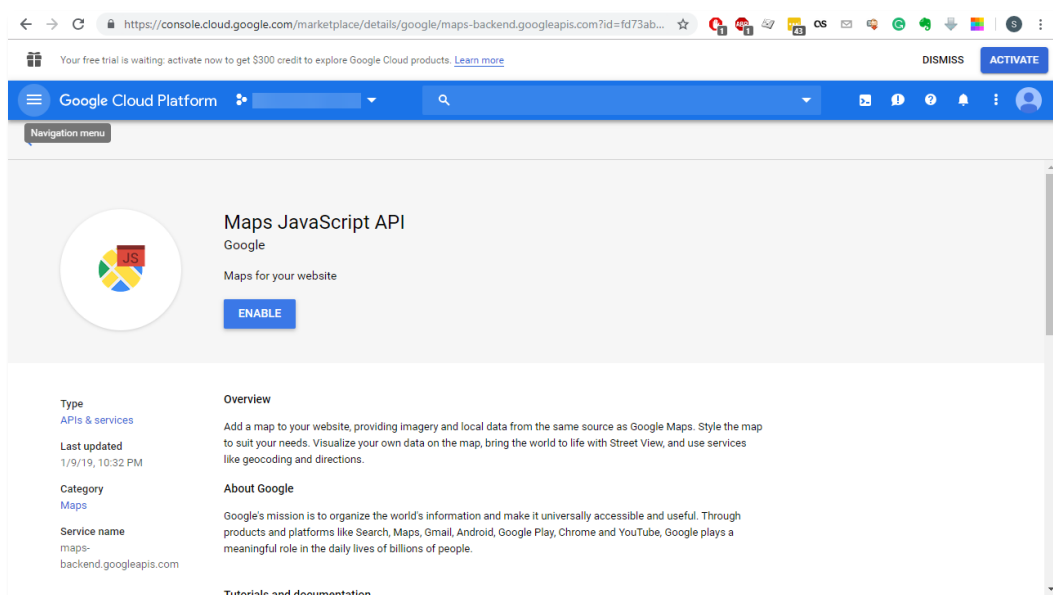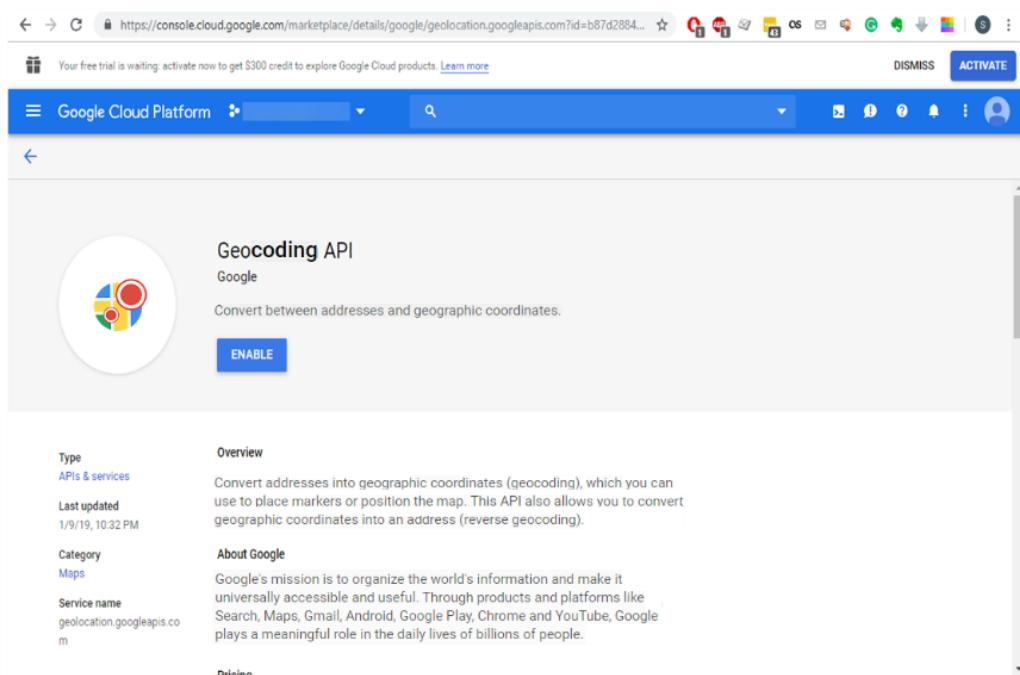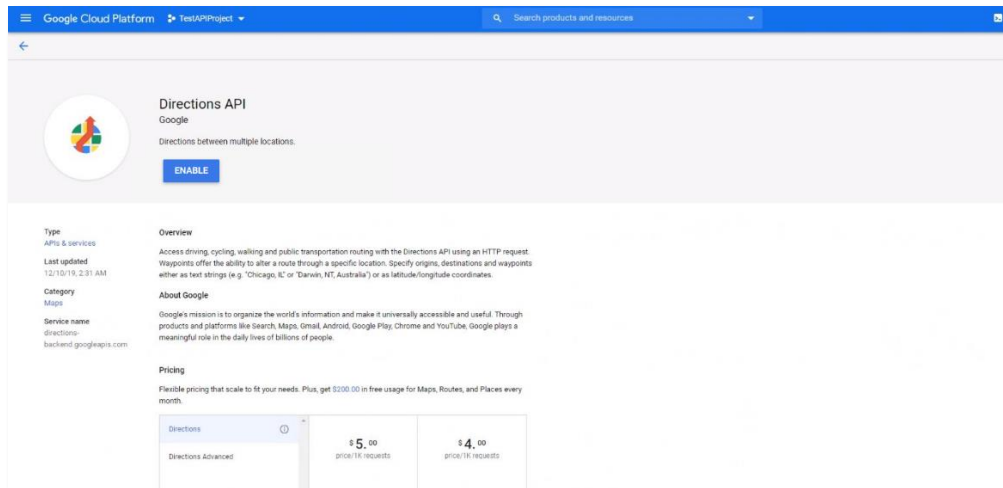1. Go to https://console.cloud.google.com and scroll to the bottom of the left-side menu
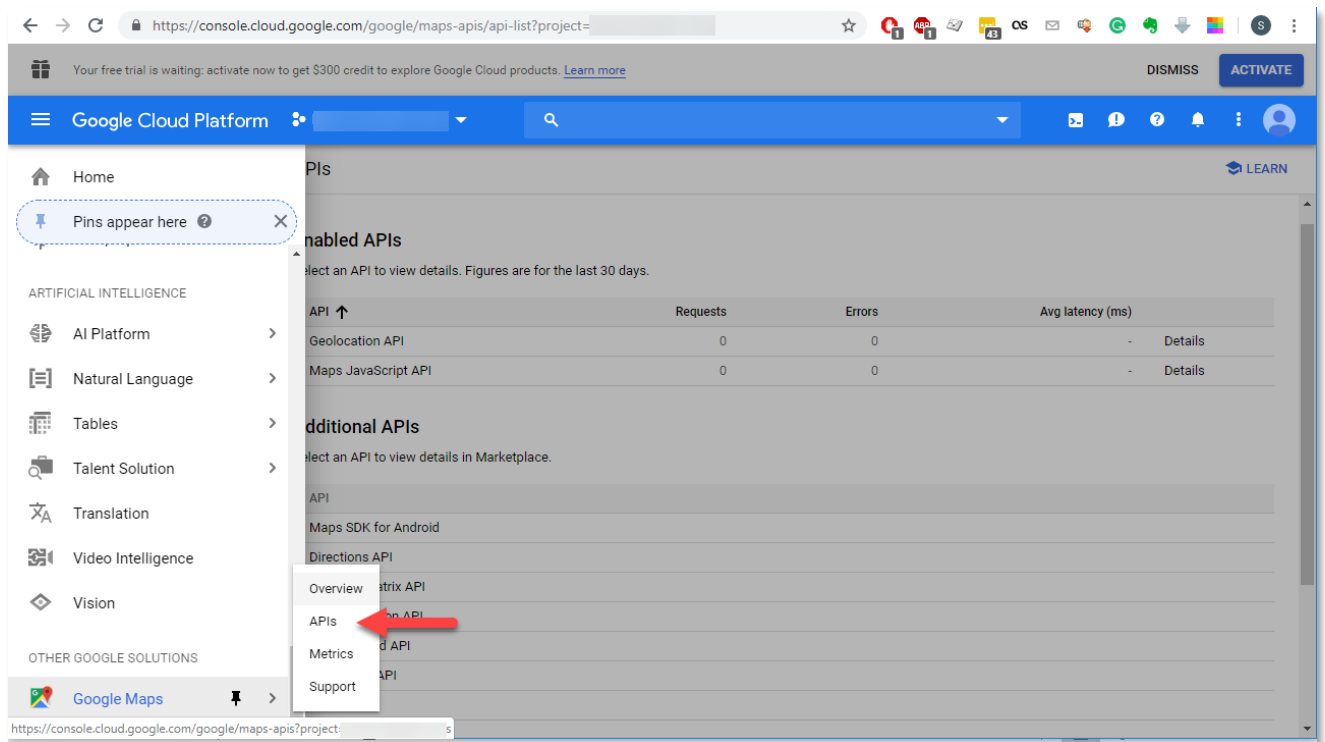
2. Select **Google Maps -> APIs**
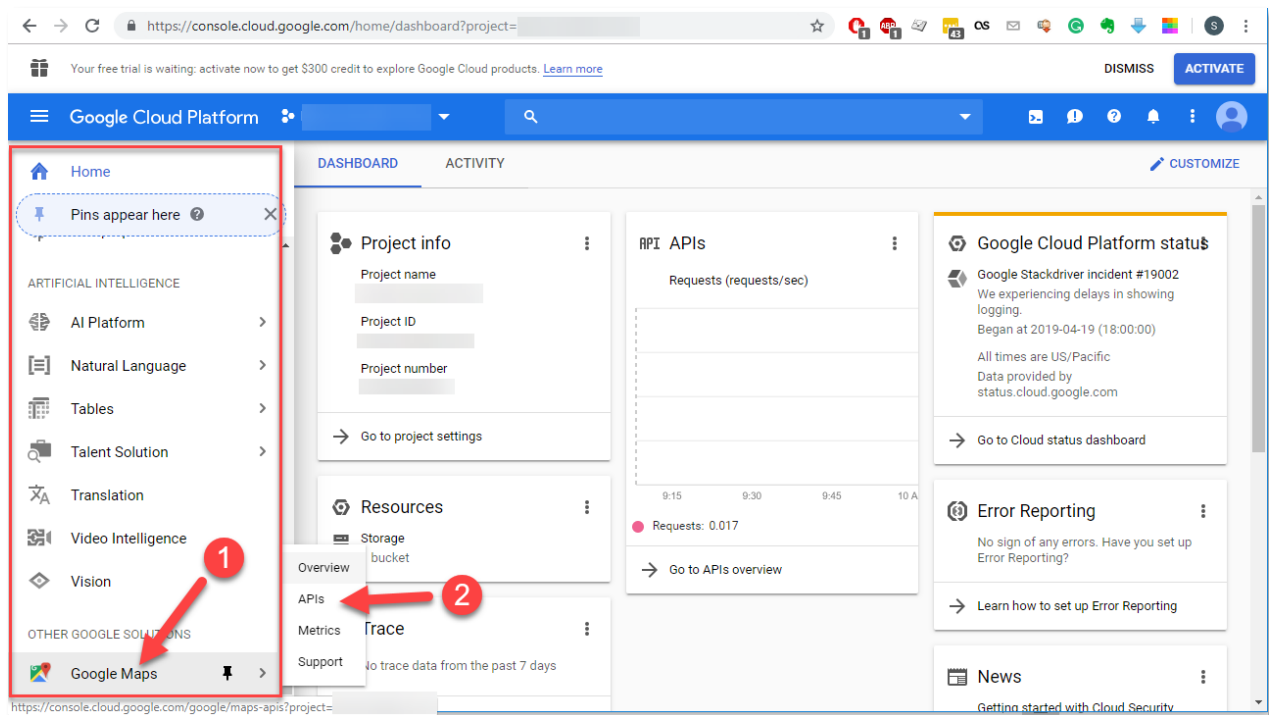
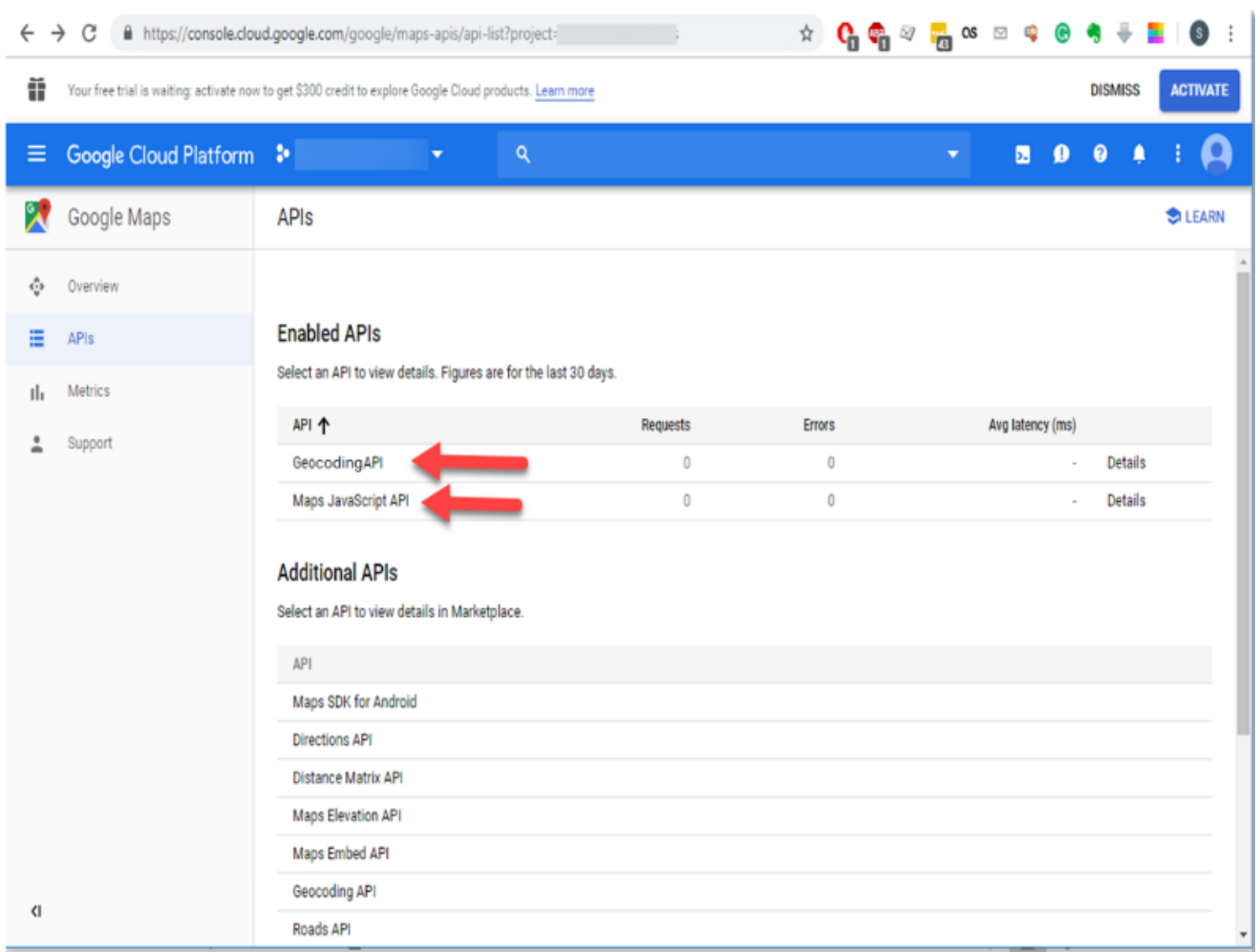3. Find **Google Maps Directions API, Geocoding API** and **Maps JavaScript API**
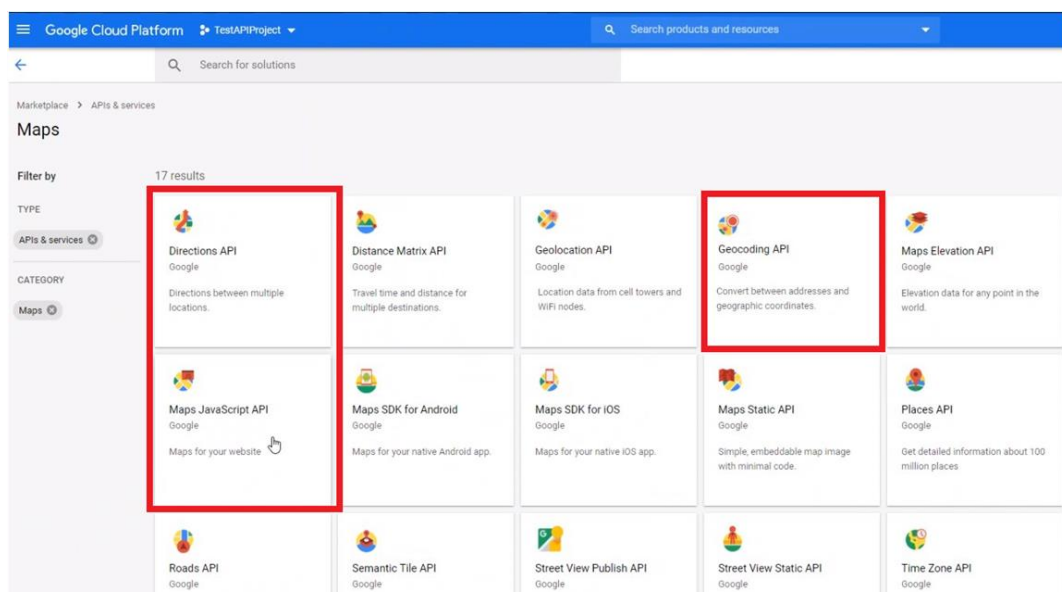
4. Enable **Google Maps Directions API, Geocoding API** and **Maps JavaScript API.**

5. Go to **Google Maps -> APIs** section again

6. Open either **Google Maps Geocoding API** or **Maps JavaScript API**

7. Click on **Credentials** to find API key

Google Maps API Limitations

Steps described above allow to activate and use **Free Version** of **Google Maps API**. It has limitations. Information about the limitations can be found in **Quotas** section
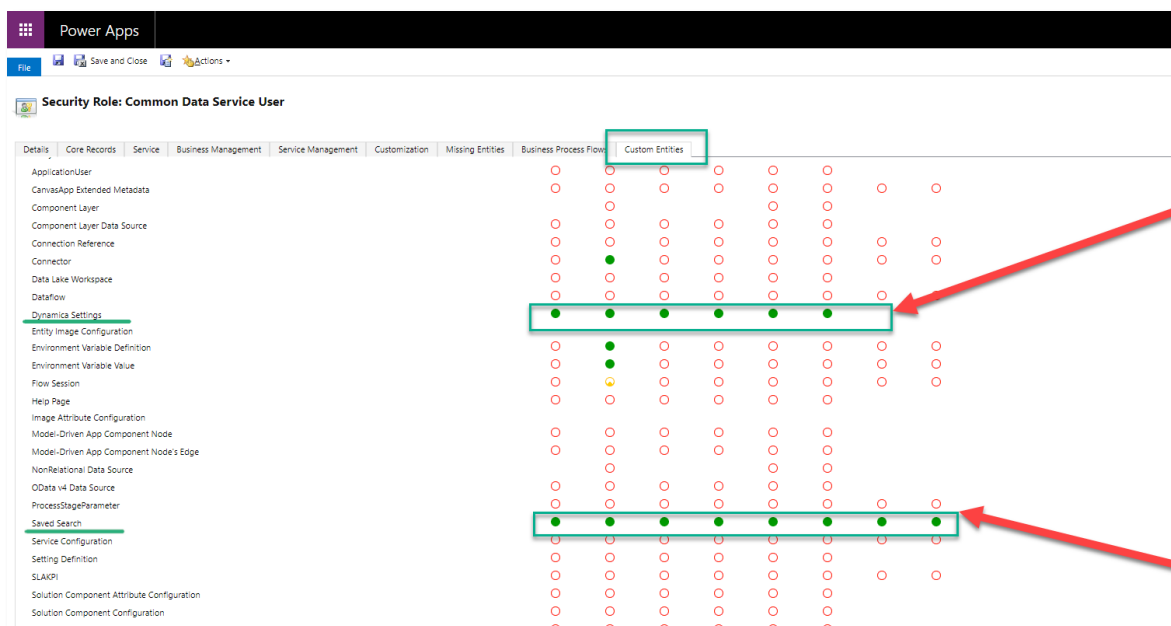
Find more information about Geocoding API Usage and Billing following this link
https://developers.google.com/maps/documentation/geocoding/usage-and-billing?hl=en_US

Dynamica Google Maps Integration solution configuration

After **Dynamica Google Maps Integration V2** solution installation few simple configuration steps must be done:

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.

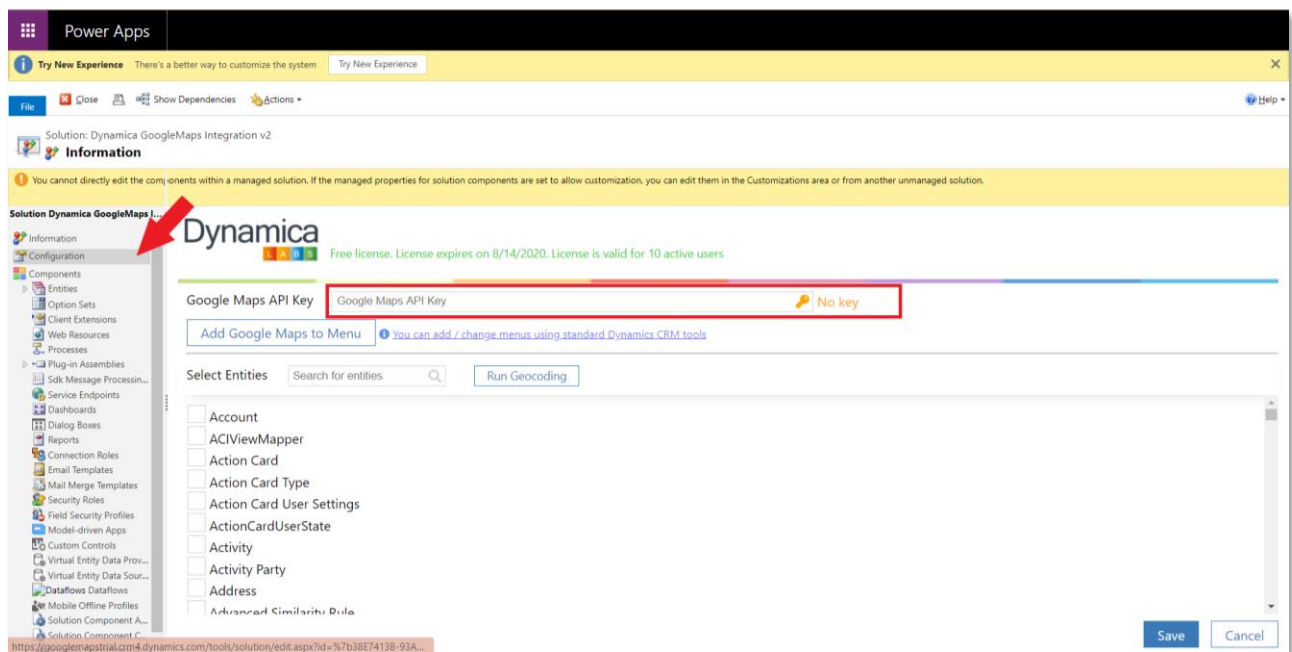   It is recommended to give access to common users to work only with their own records.

3. Go to **Settings -> Solutions** and open **Dynamica Google Maps Integration V2** solution.
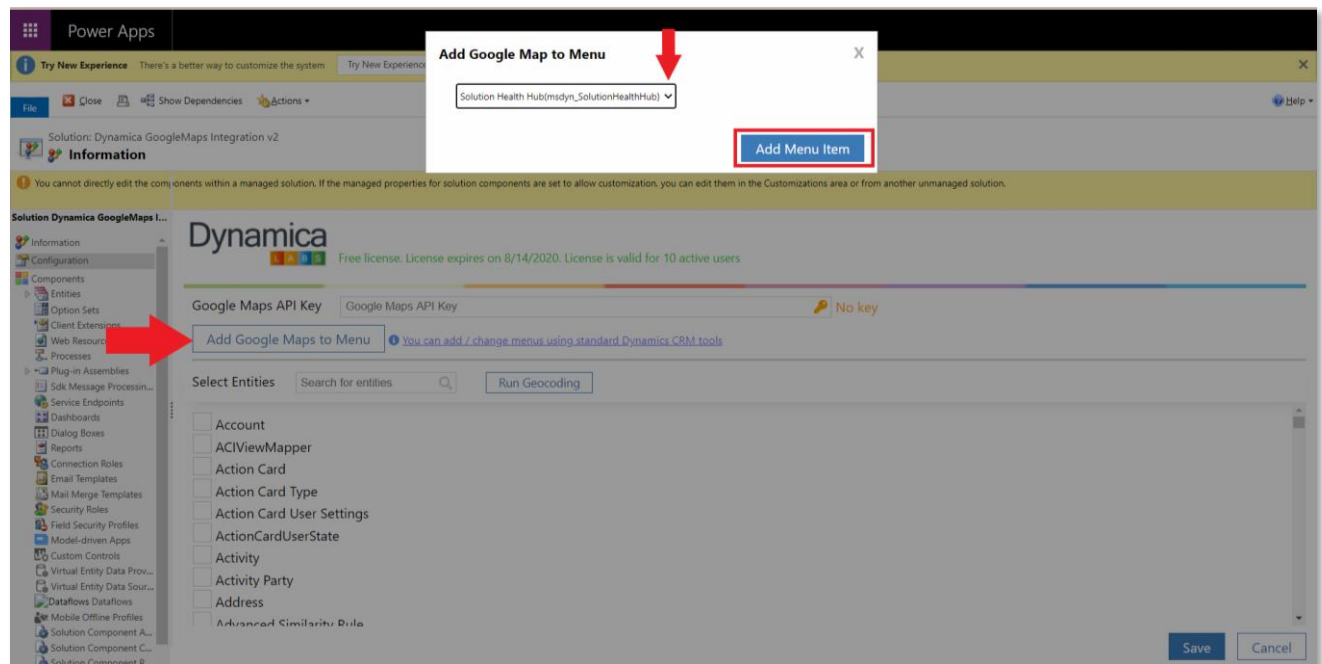
4. Go to the **Configuration** page. Copy your **Google Maps API key** into appropriate field.

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.
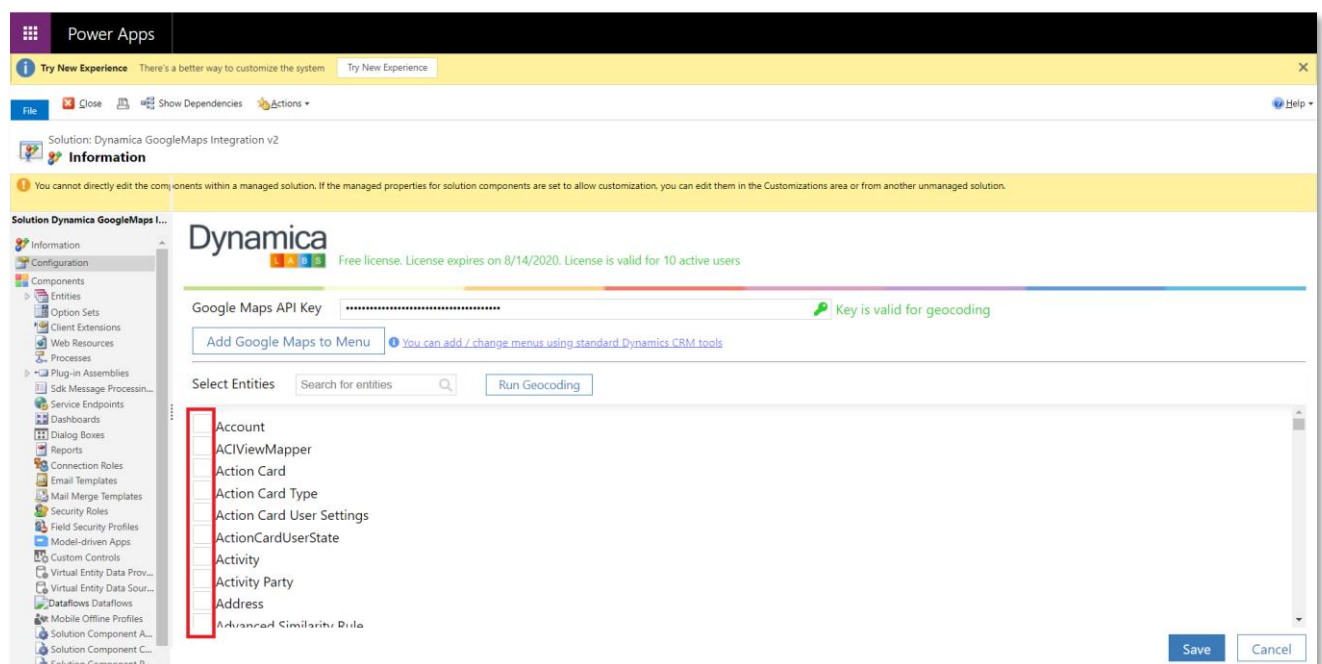

7. Select in each chosen entity 1 field with the **Longitude** and 1 field with the **Latitude**.
8. Select in **Part of Address** all address fields that will be searched on the map (country, city, street, etc.). Or you can choose 1 composite field, for example, Address 1.
9. Select in the **Map Tooltip** all the fields that you need to be displayed in the **Results**, when you click on the marker on the map.
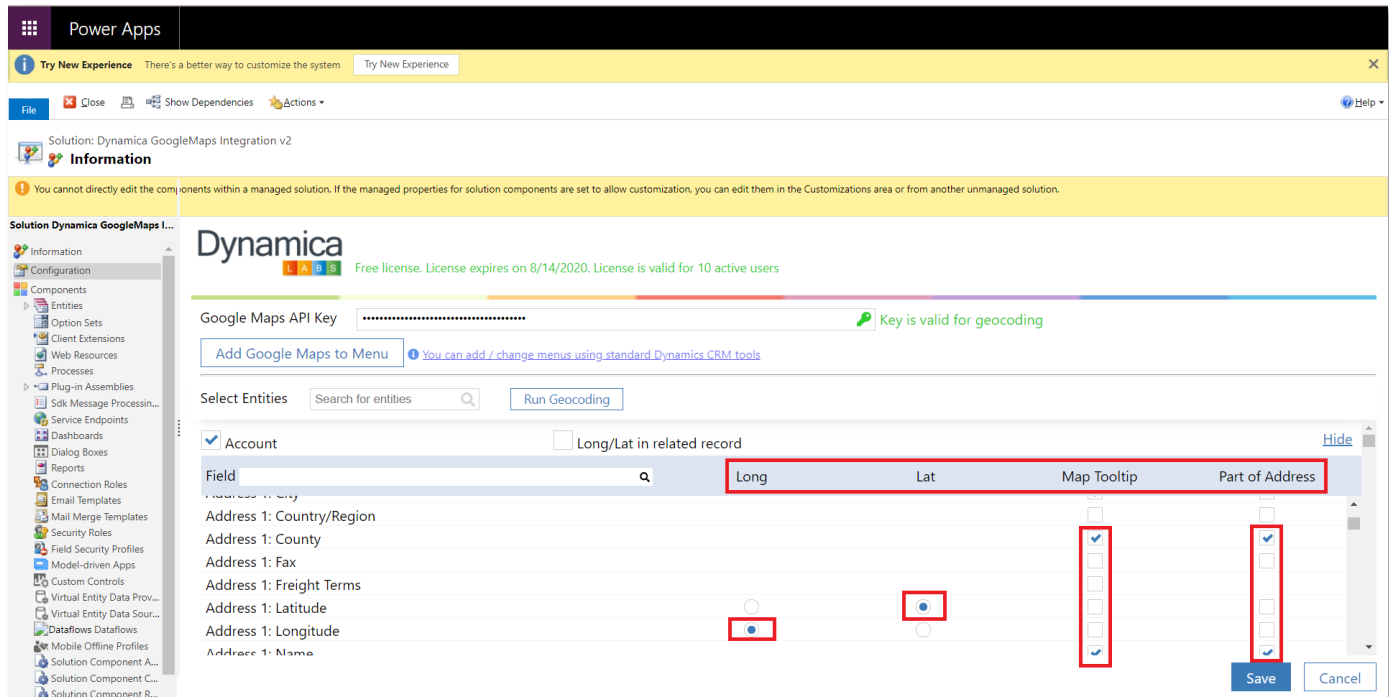
10. After all entities and their parameters are selected, click on the **Run Geocoding** button.
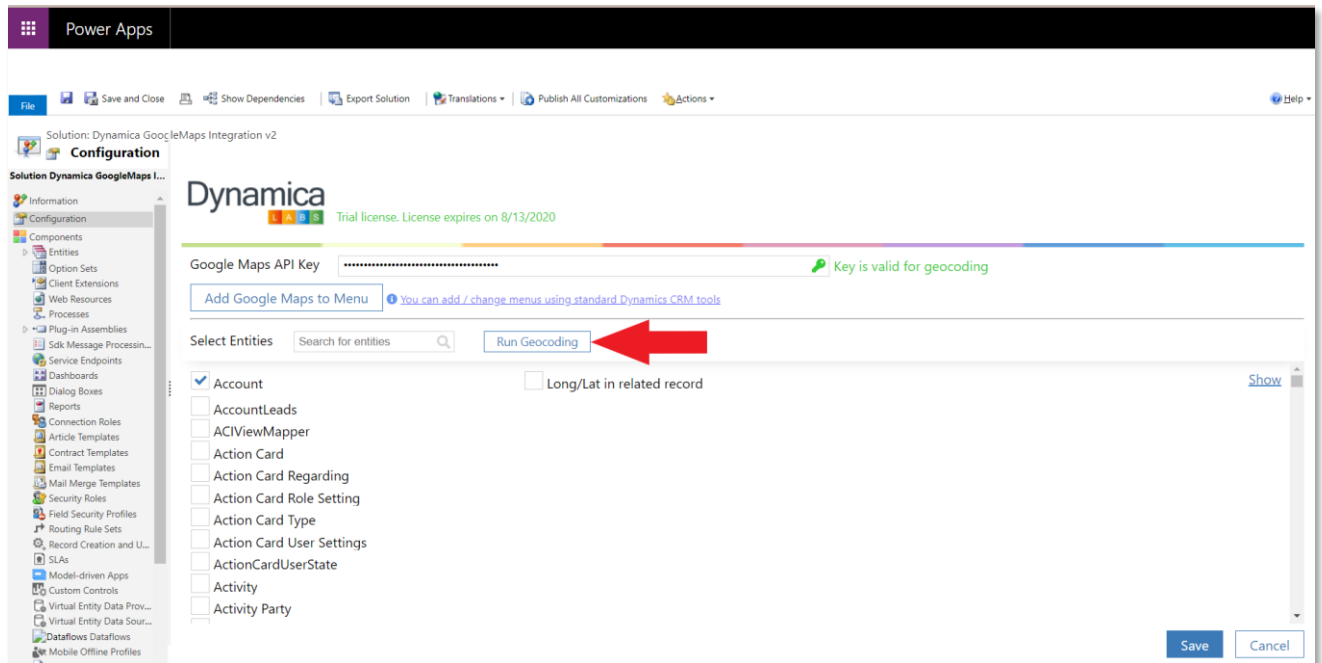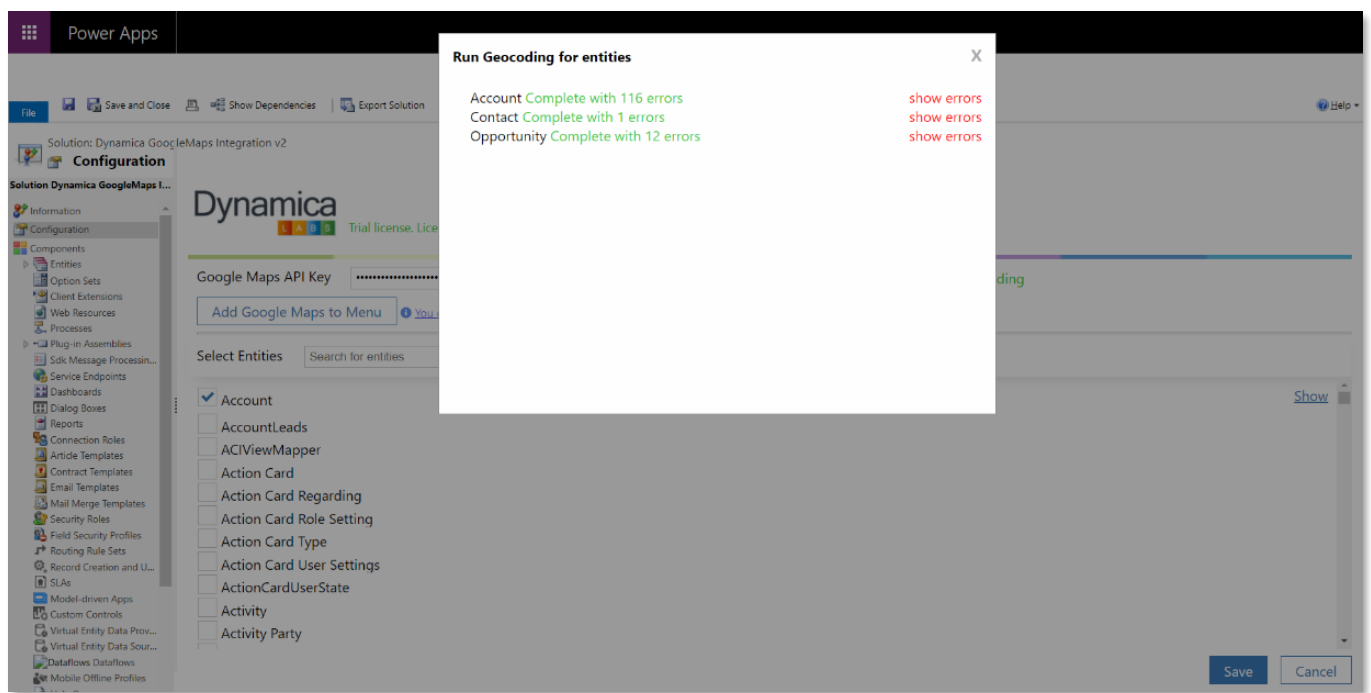

11. In the modal window, that appears, the selected records and their number are visible. Click
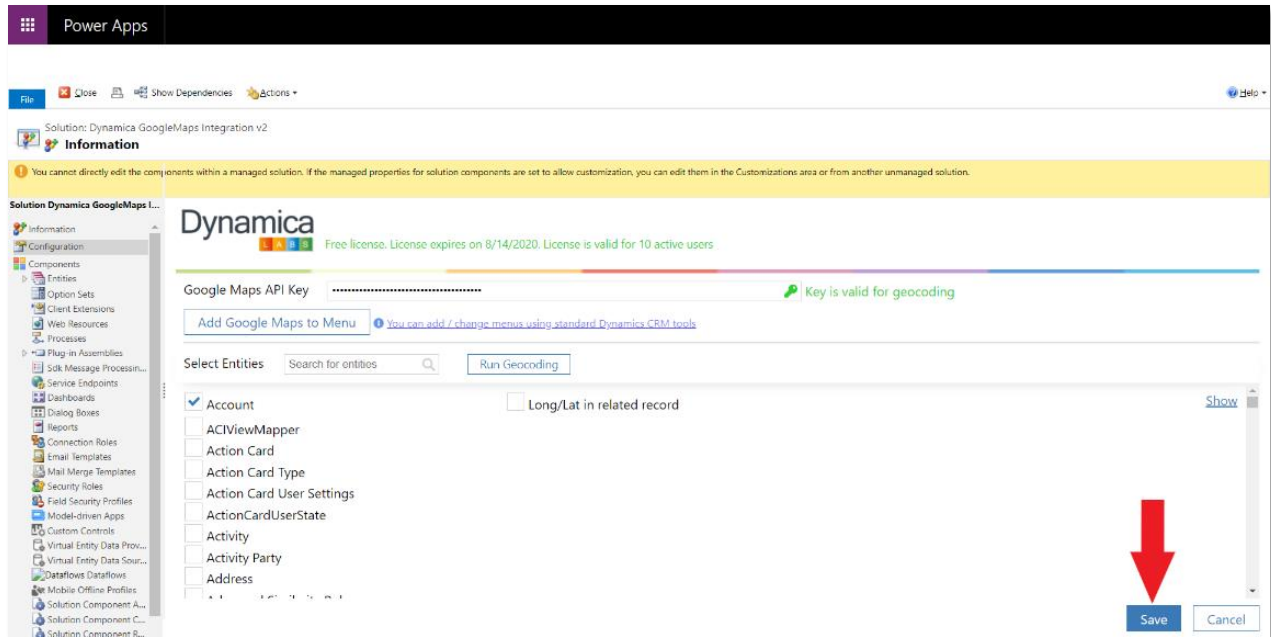**Run Geocoding**.
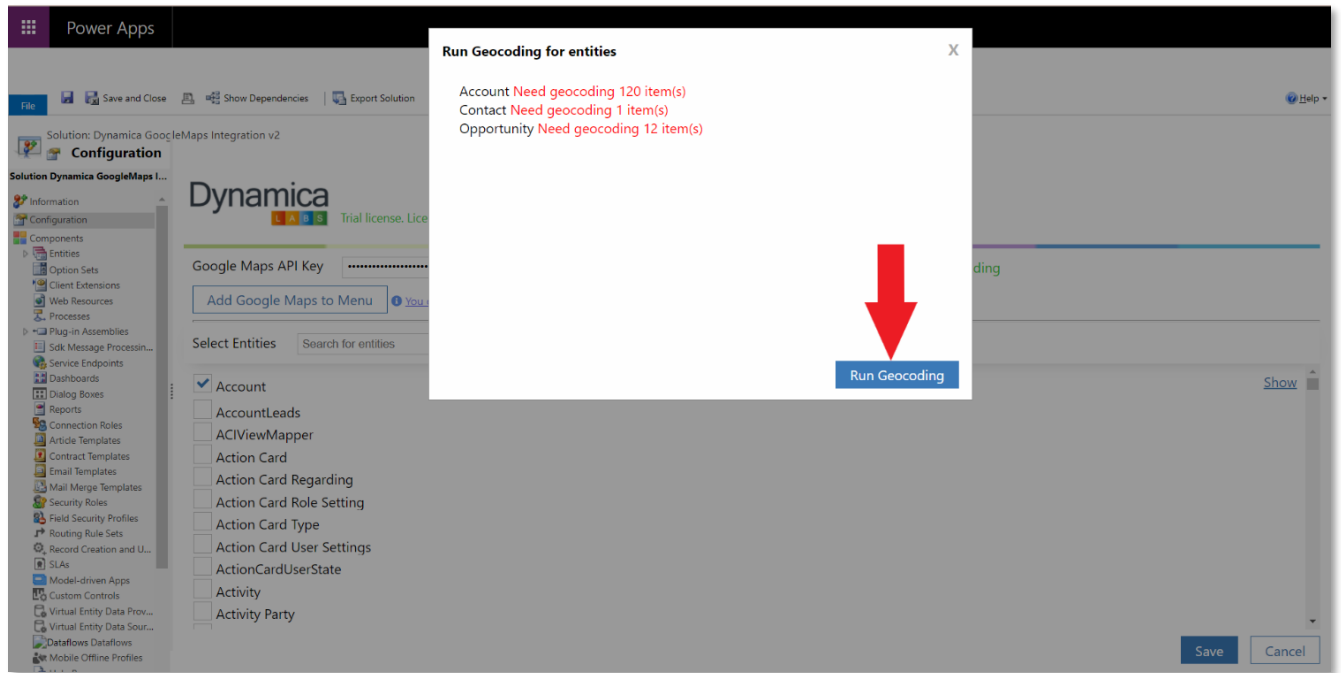
12. After geocoding is completed, close the window.

    If there are any errors, then you can see them by clicking on **show errors**.

13. After finishing the settings, click the **Save** button and reload model-driven application.

Dynamica Google Maps Integration Trial and Licensing

After installation - **Dynamica Google Maps Integration** solution works in trial mode.
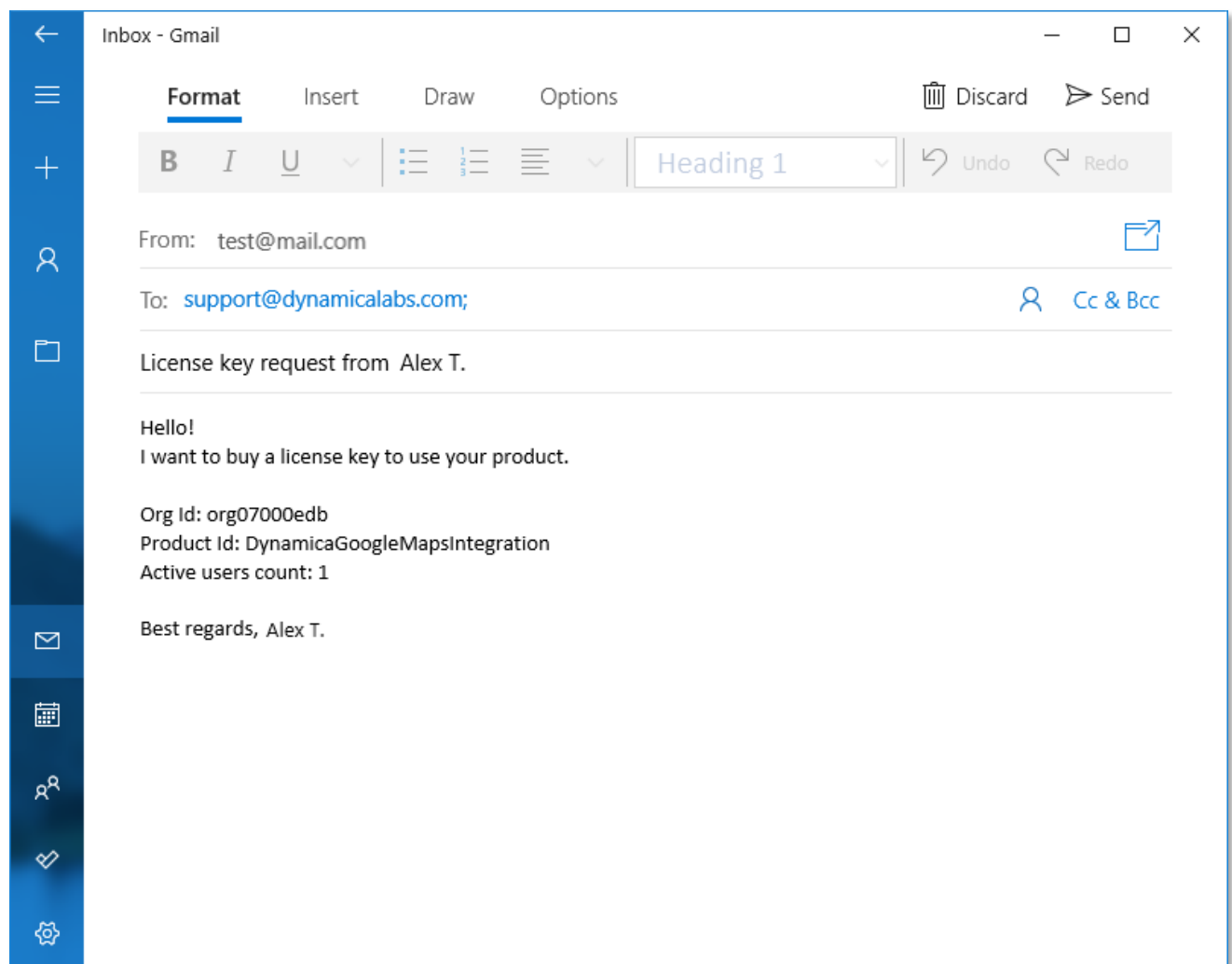
Trial version works only for 1 month.

To get licenses:

1. Go to **Settings -> Solutions** and open **Dynamica Google Maps Integration** solution
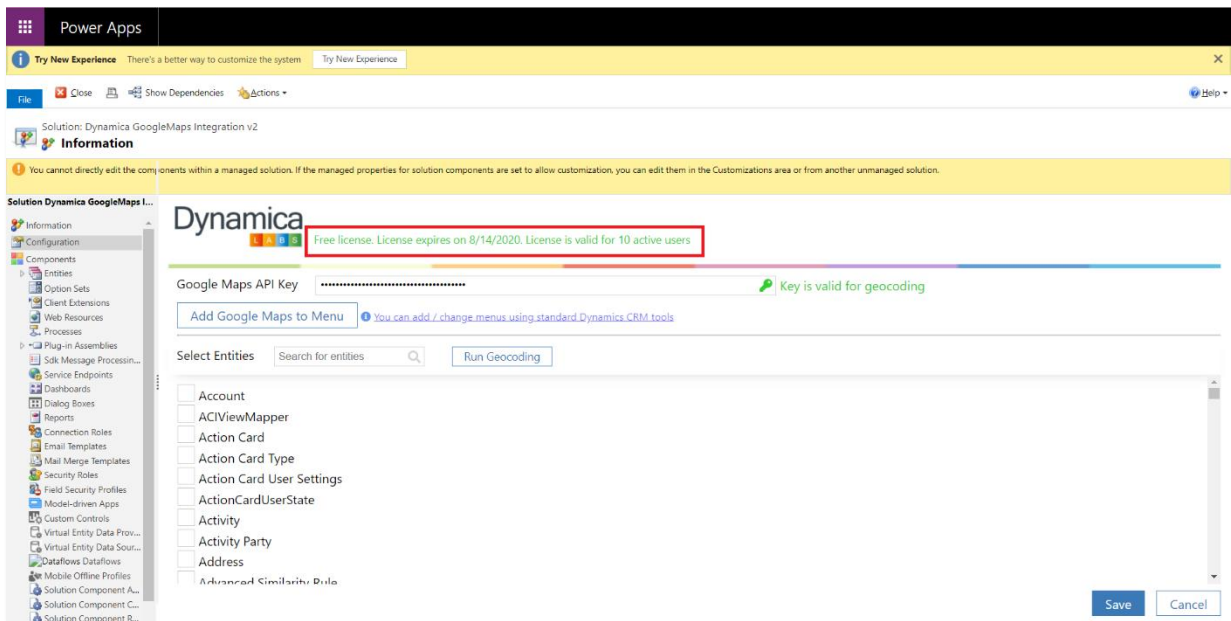

2. Click on support@dynamicalabs.com
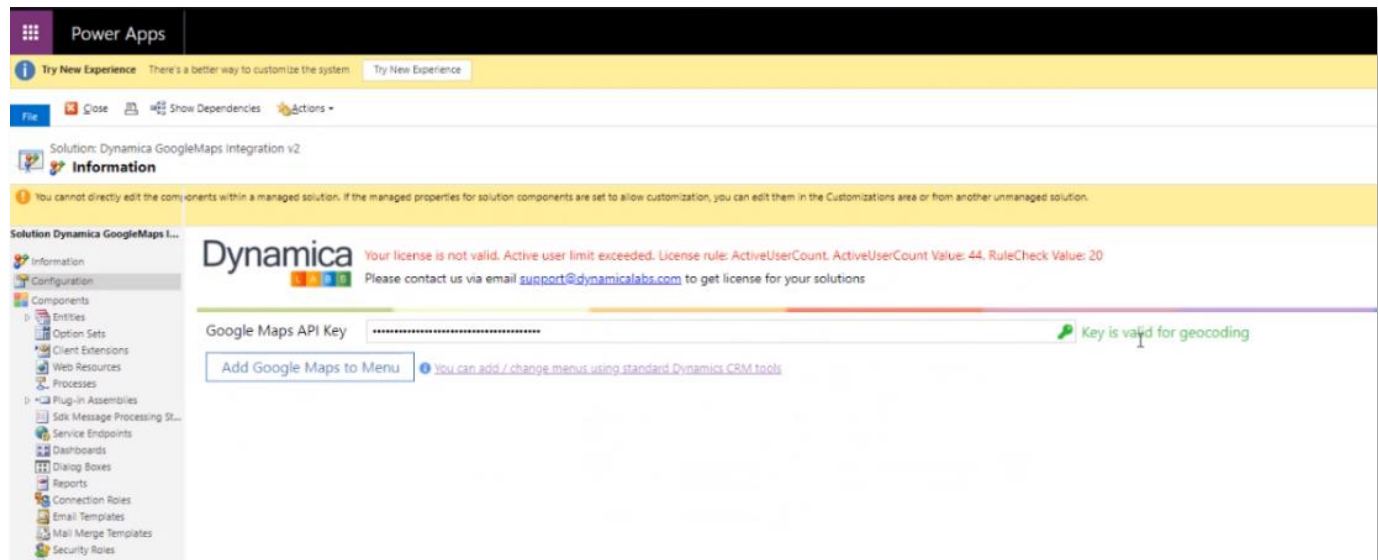
3. Specify number of users you want to get licenses for
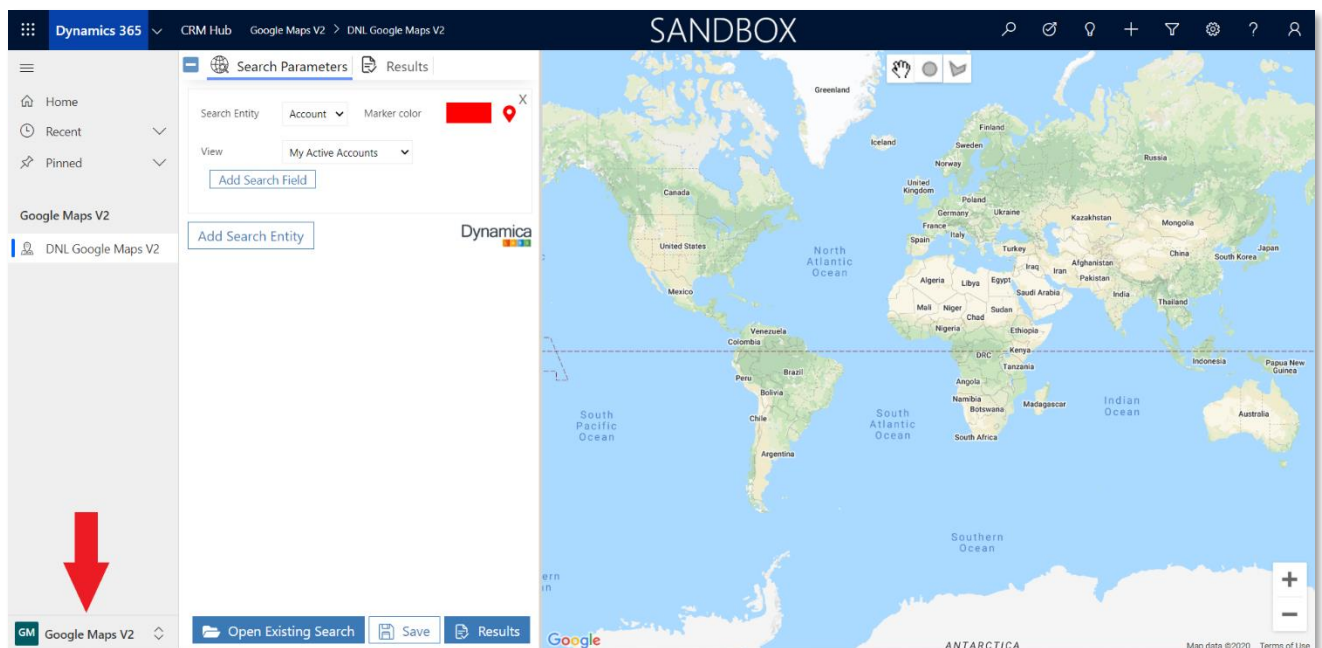
Free licenses for up to 10 users

You can get licenses for up to 10 users for Free.

Google Maps Search Parameters
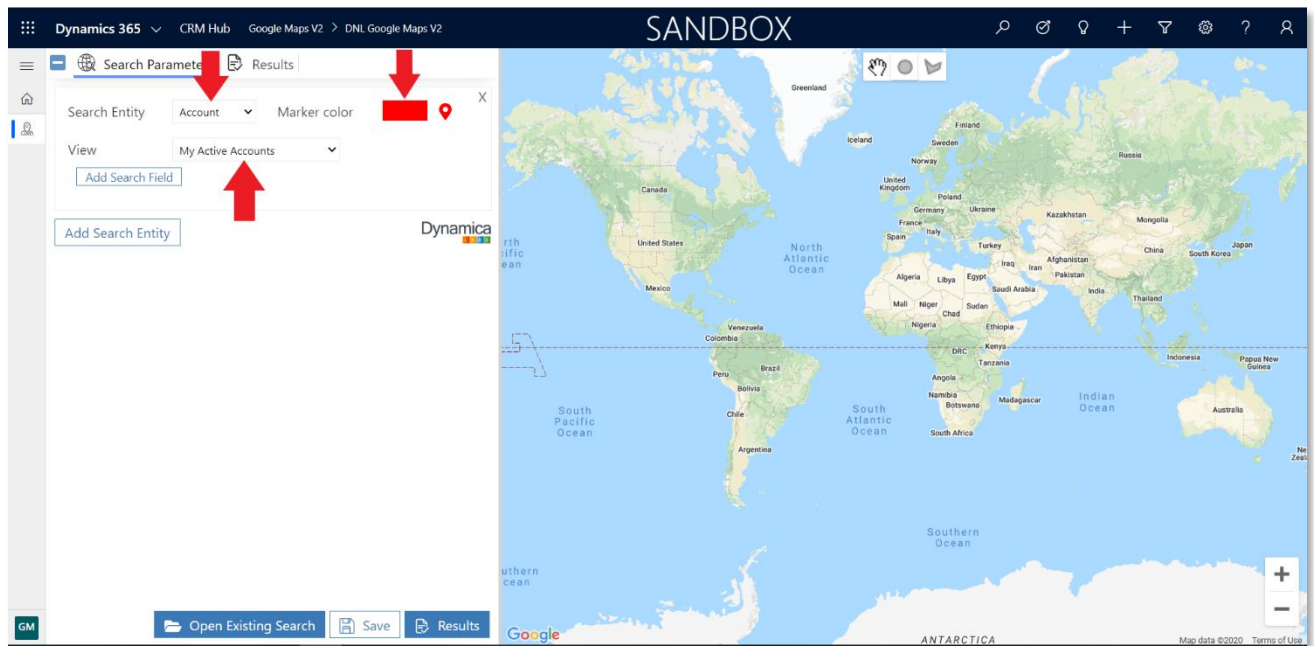
After solution installation open the application.

1. Change the area to the **Google Maps V2**. Click to the **DNL Google Maps V2**. Go to
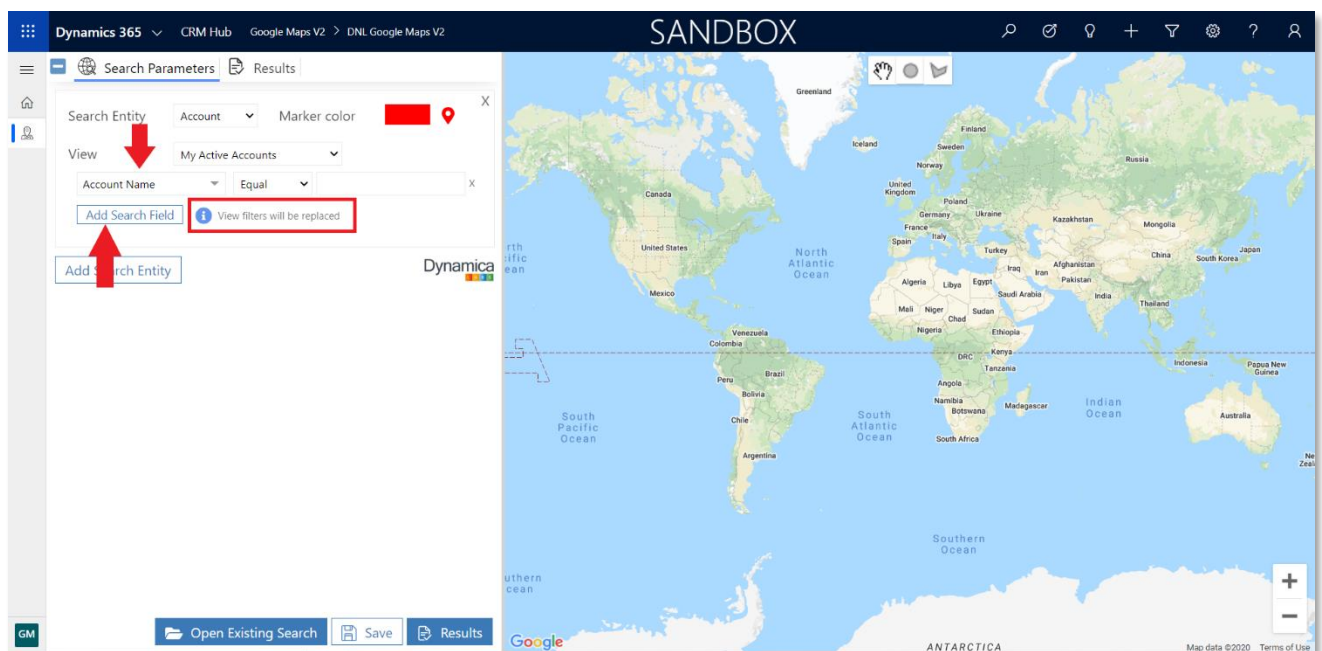   **Search Parameters.**

2. Chose the **Search Entity** from the drop-down list.
3. Chose the color of the marker.
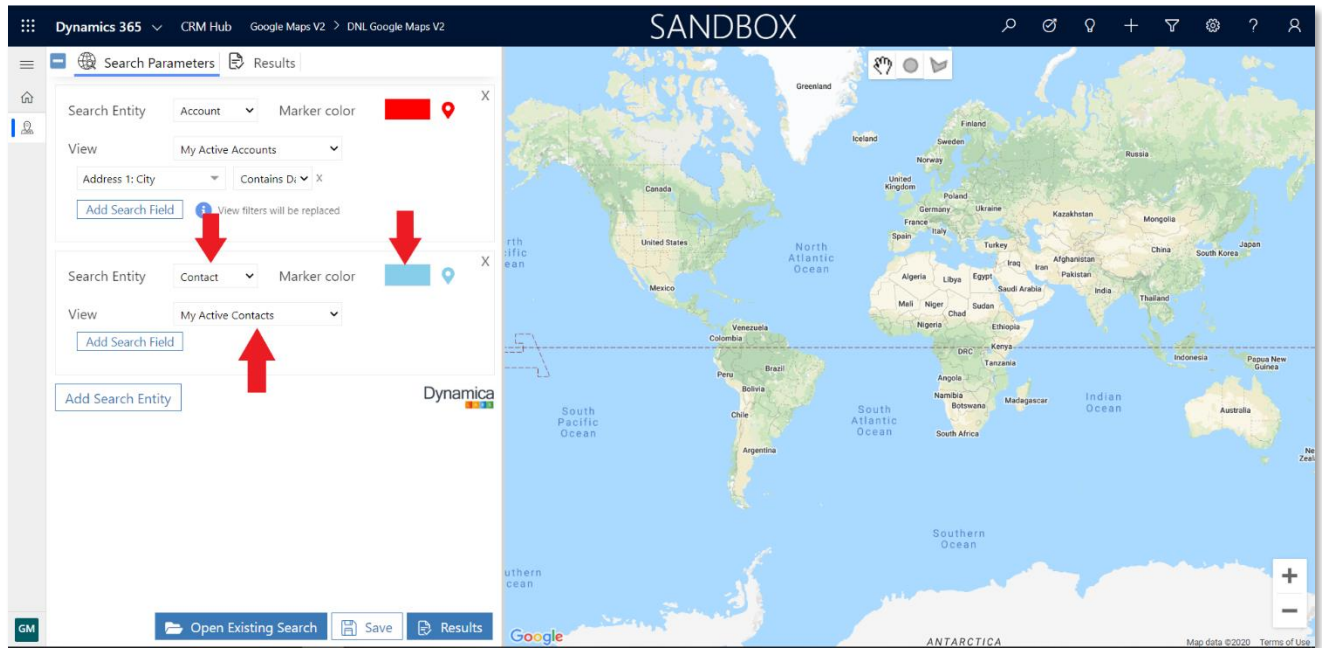
4. Chose the **View** from drop-down list.

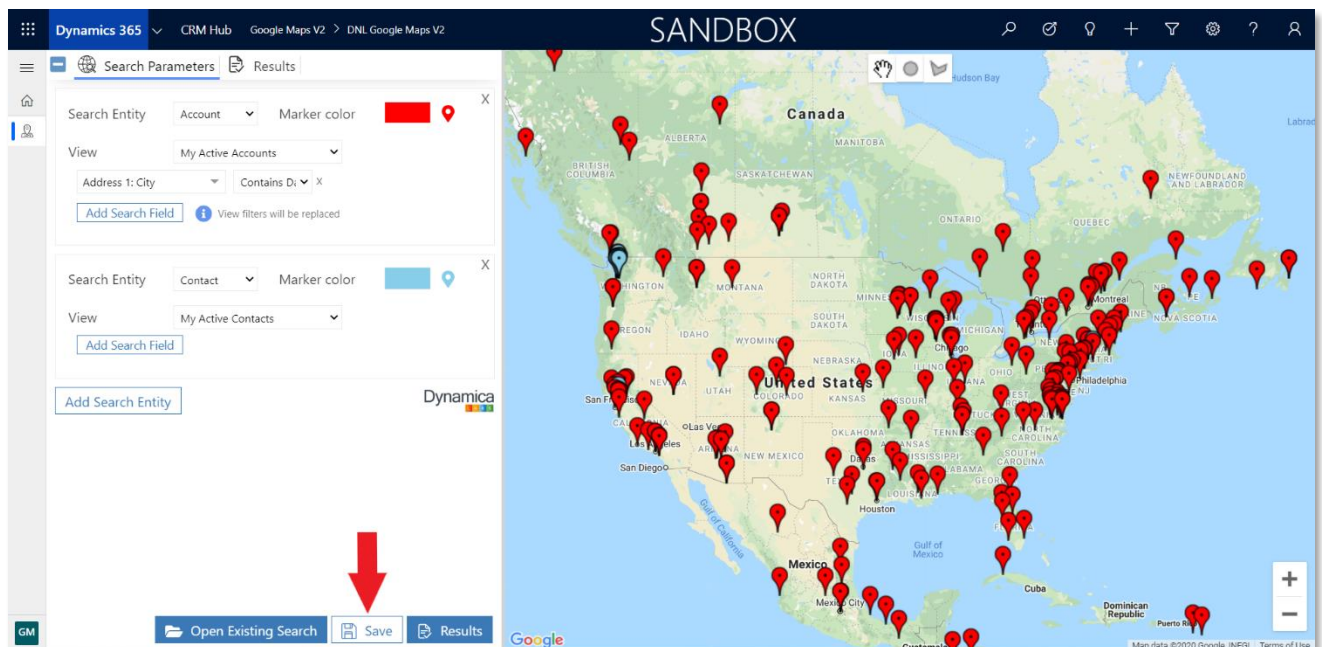5. Add the field for filter using the **Add Search Field** button.

6. Add the new **Search Entity** using the **Add Search Entity** button.

7. After completing **Search Parameters**, click **Results** button, then go to **Results** tab.
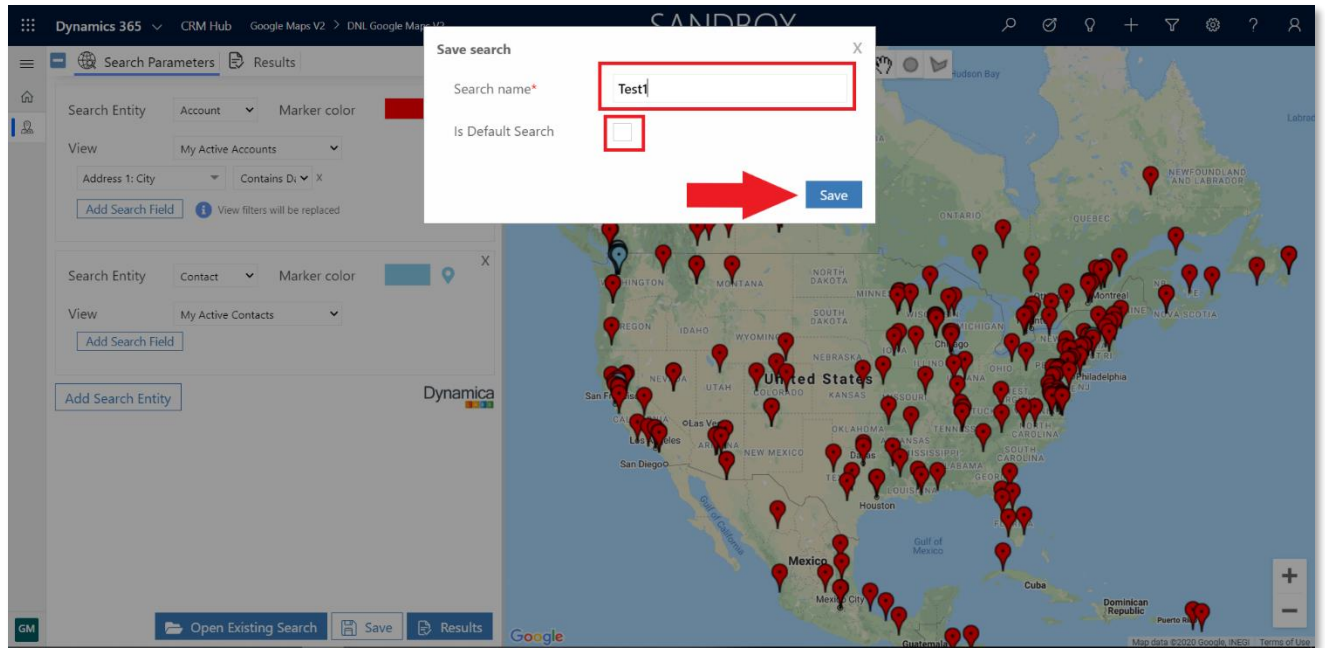
Save the new Search

1. After completing [Search Parameters](#), click **Save**.
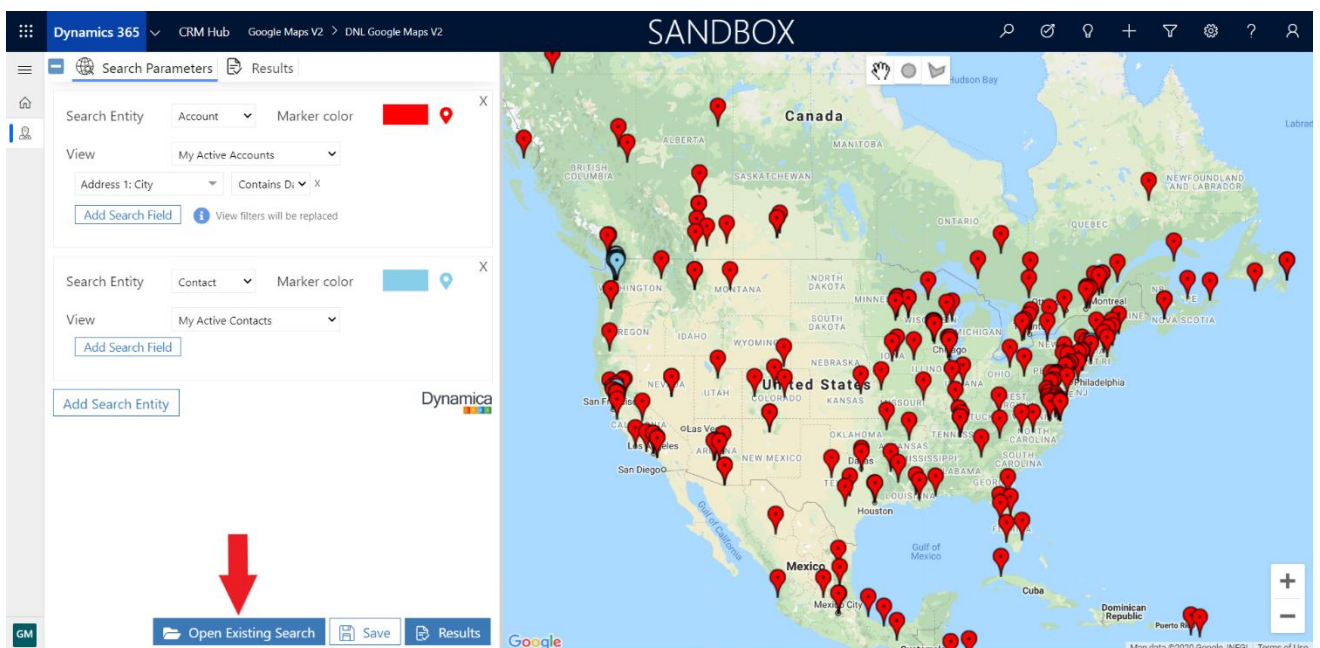

2. Type the new name in the modal window.

3. Select **Is Default Search** if needed.
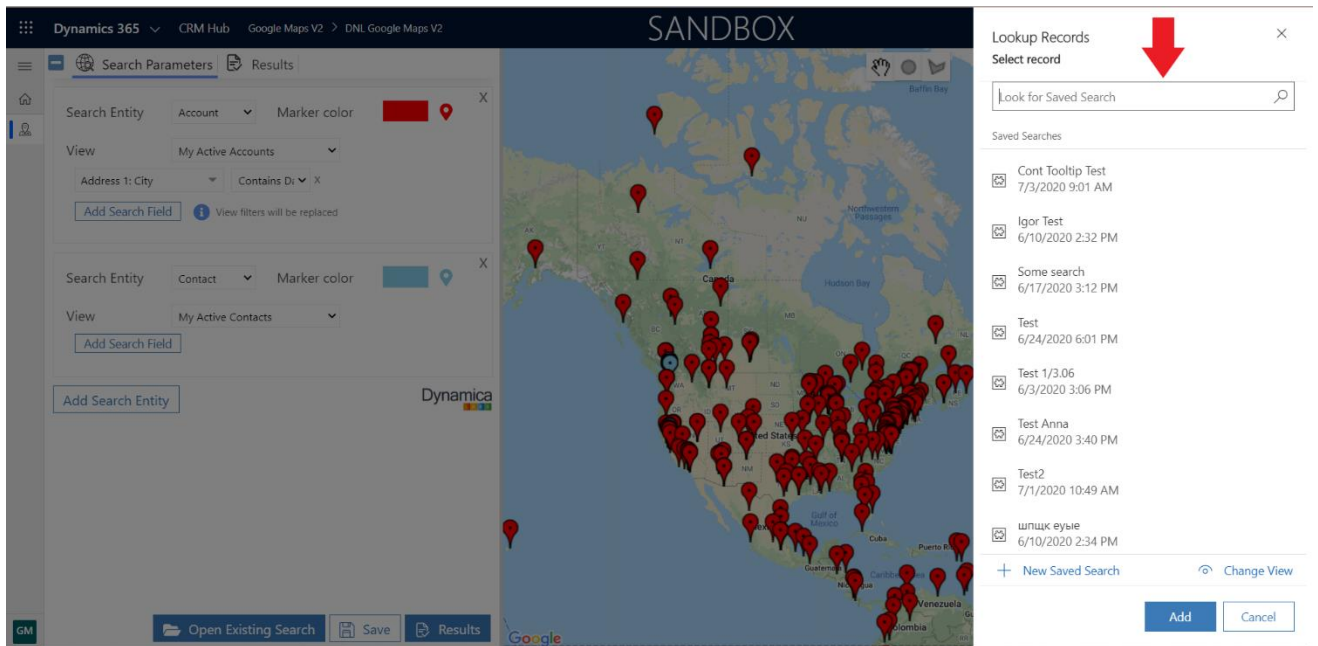
4. Click **Save**.

Open Existing Search

1. Open **Search Parameters** tab.

2. Click to the **Open Existing Search** button.

3. In the window on the right type the name to search or press **Enter** to browse.

4. Select the **Saved Search** from the list.

5. Click to **Add** button.

Google Maps Results

On the left you can see the tabs with the lists of searched entities.

On the right side you can see the coordinates of the search entities from the selected views are shown on the map by markers with the corresponding colors.
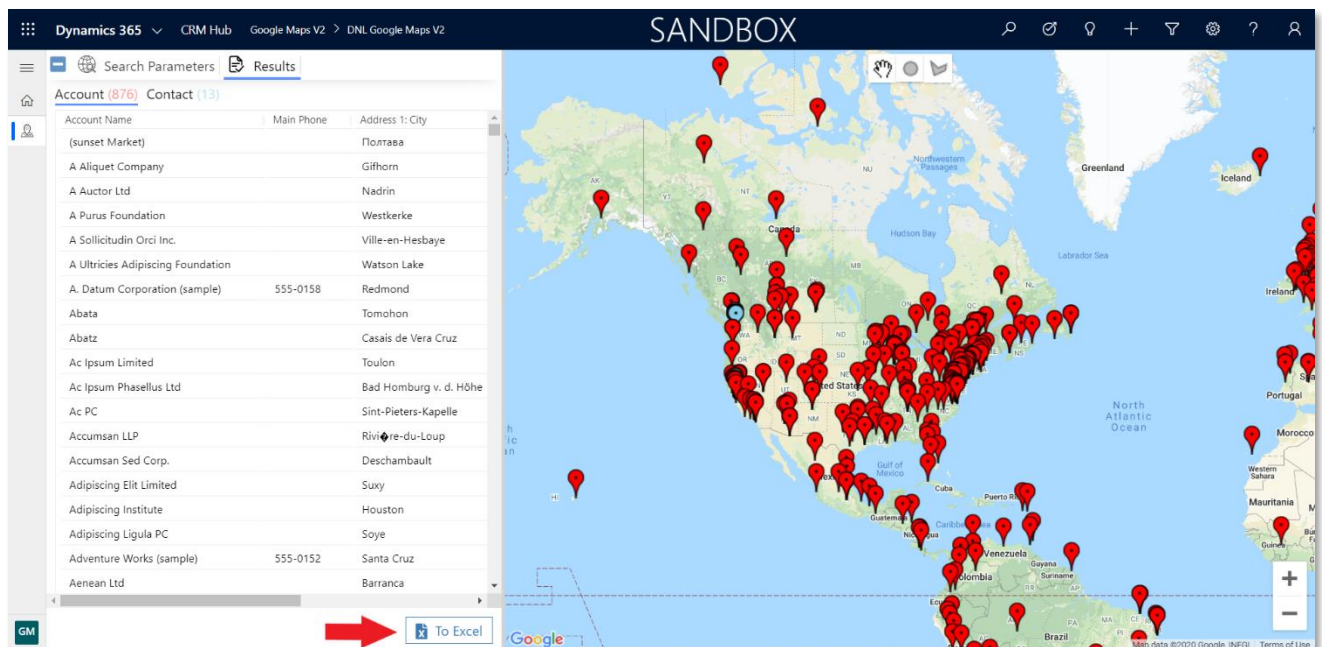
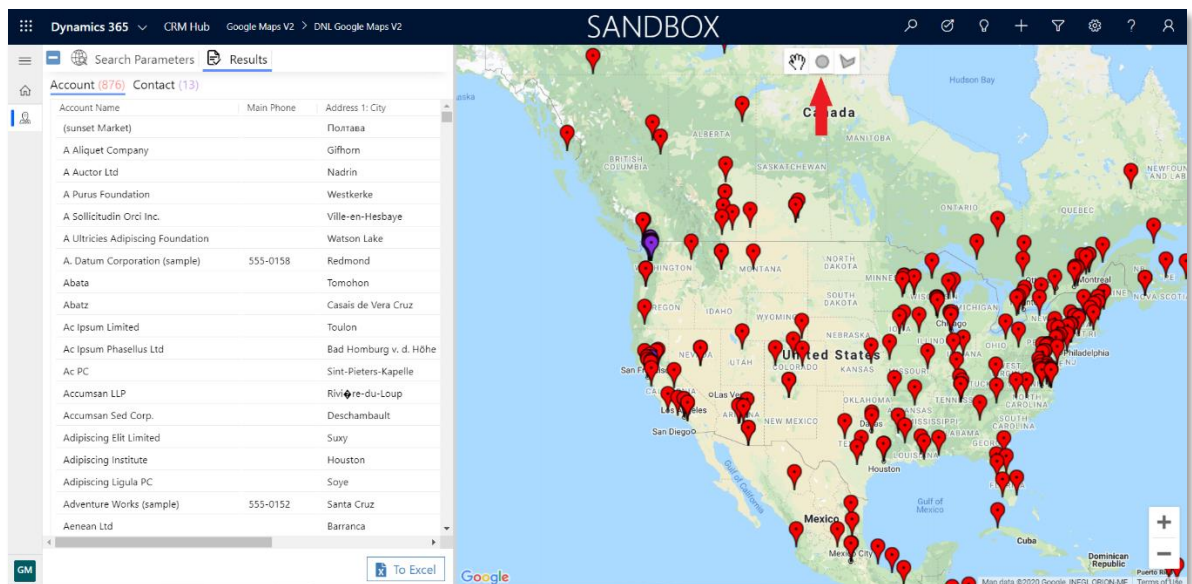To Export the Results grid to Excel click to the **To Excel** button.

Filter the Results on the Map

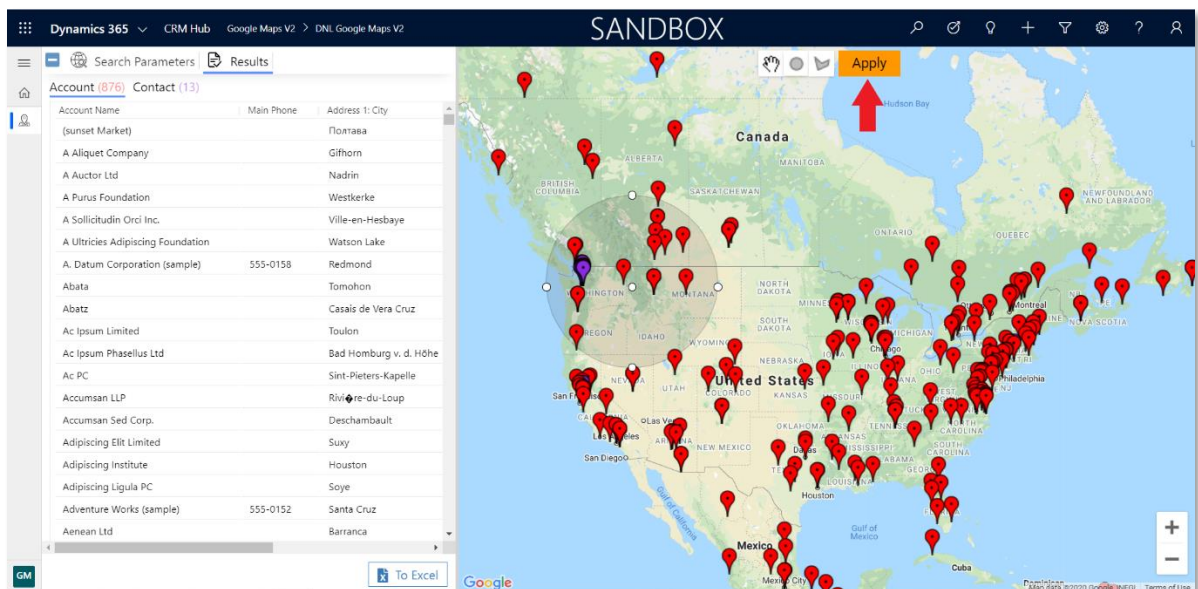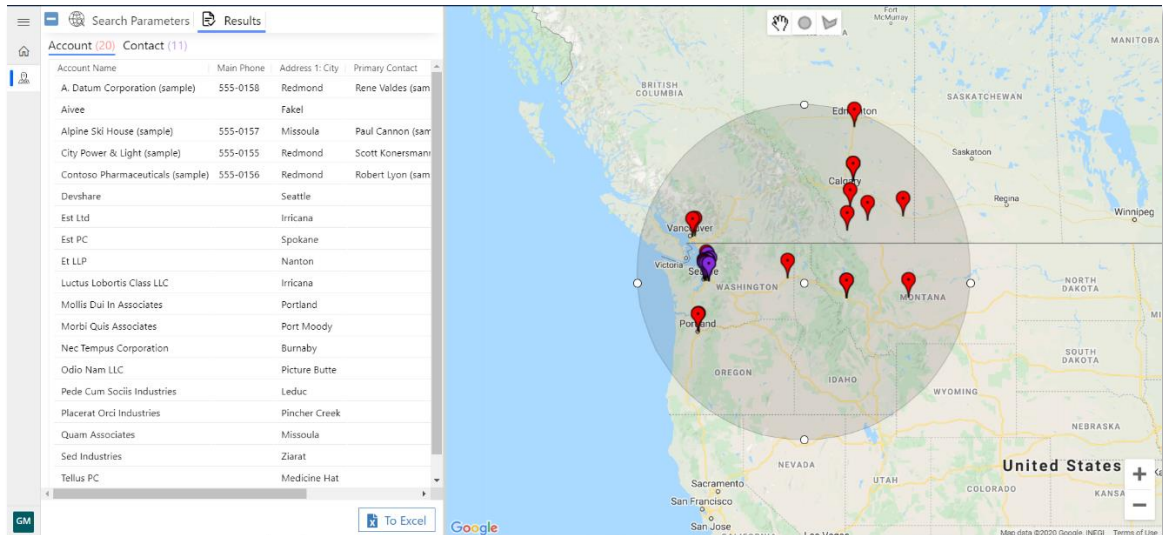To filter markers on the map use one of the buttons on the top of the map:
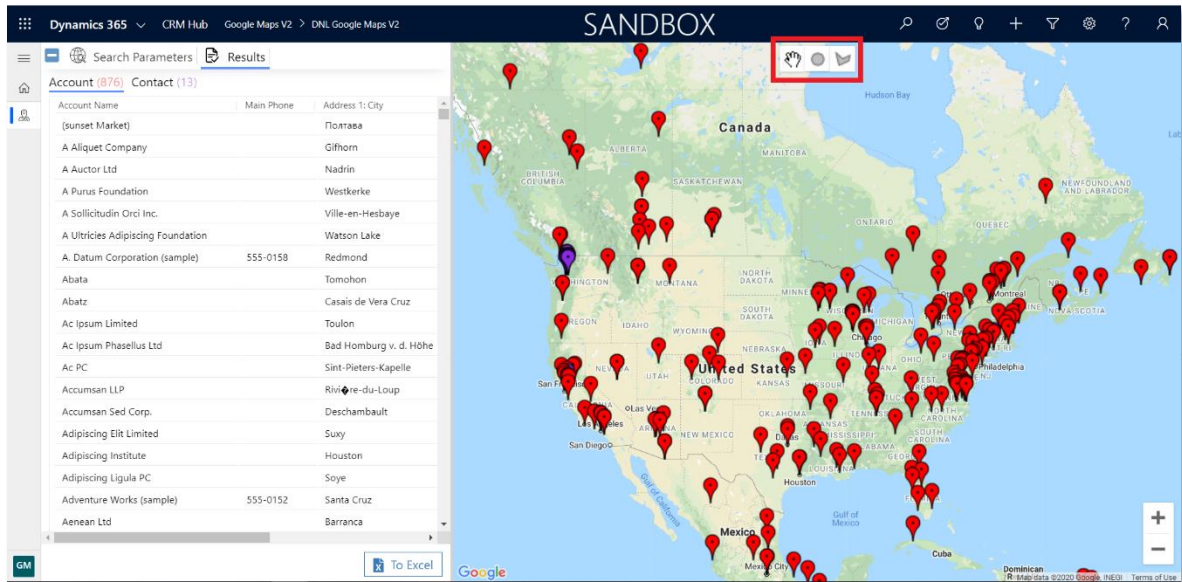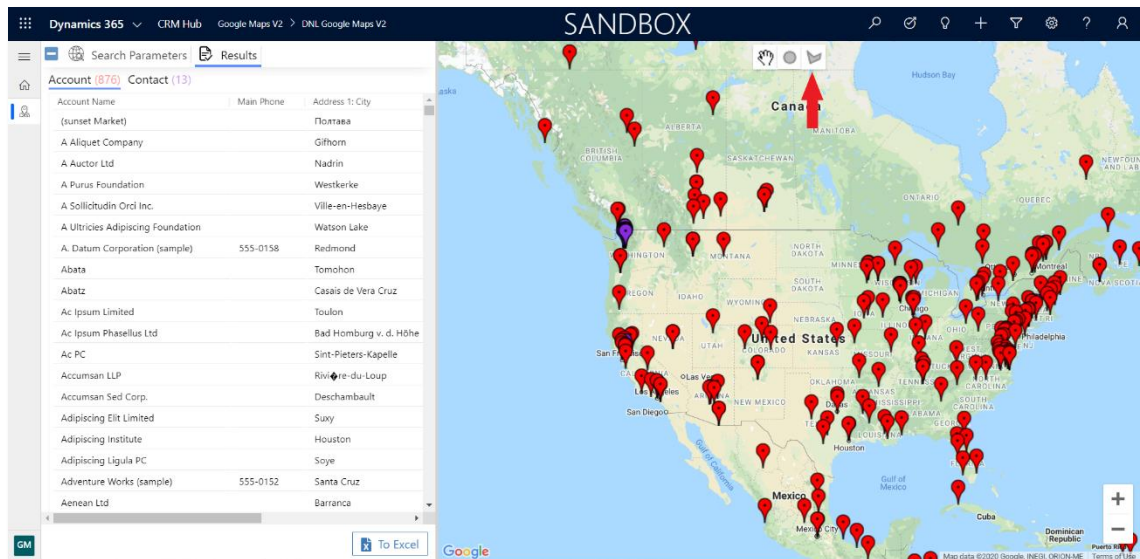
1. Click on the button with a circle.

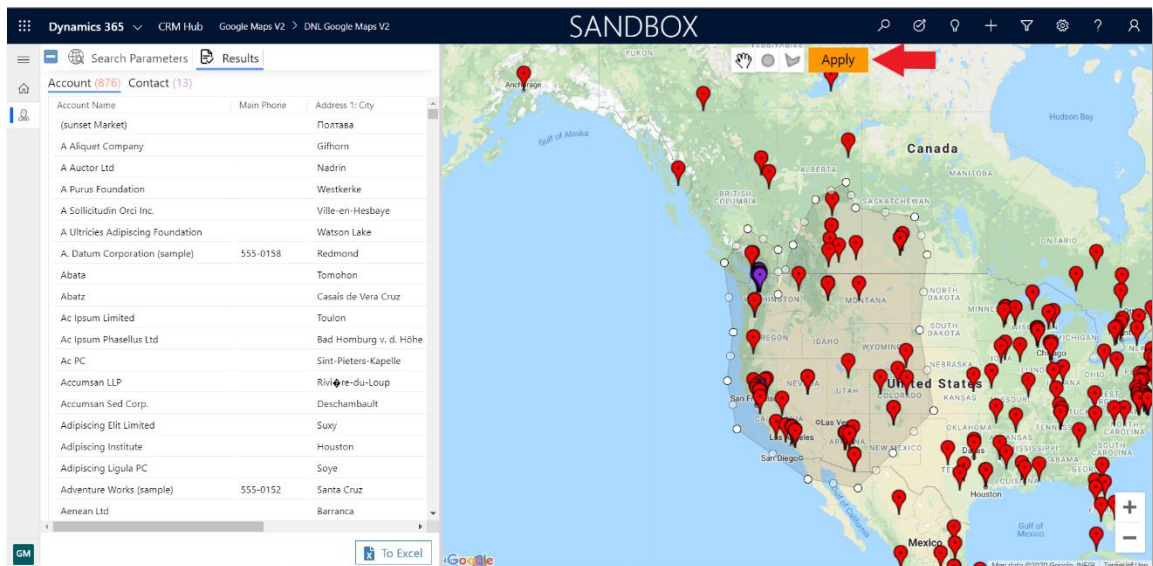
2. Draw a circle on the map and click on **Apply** button.

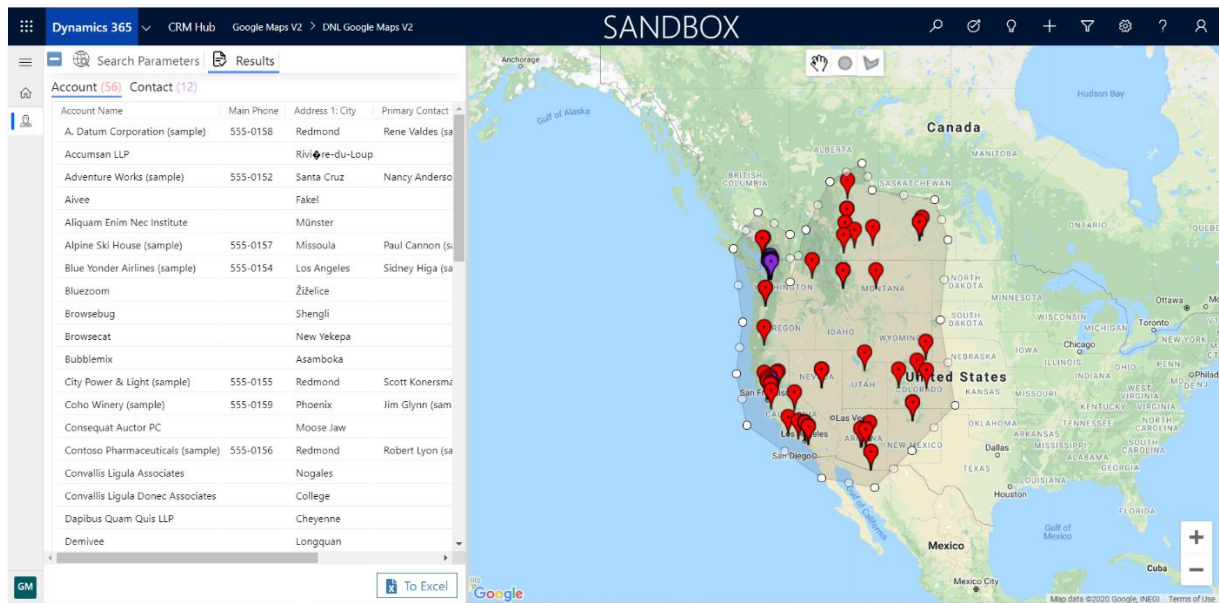3. Review the result.

4. Click on the button with a polygon.

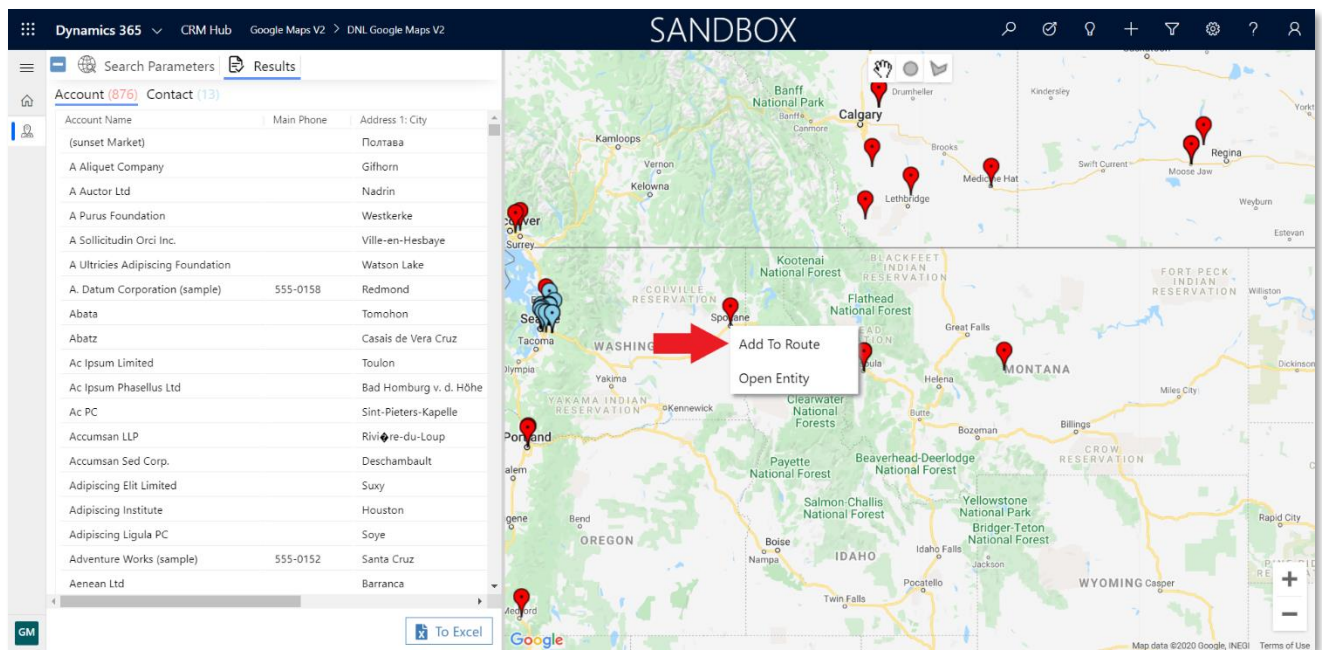5. Draw a polygon on the map and click on **Apply** button.

6. Review the result.

Build a Route on a Map

After receiving the results, you can begin to build a **Route**.

1. Right-click on the markers on the map. Select **Add to Route**.

2. The panel that appeared on the right contains the coordinates of the added points and buttons for copying and sending links to this route.

3. To open the new route in the **Google Maps** application, click to the **Route Link**.

4. To copy to the clipboard a link with this route, click on the copy icon.

5. To send this route by email, click on the on the envelope.