USER MANUAL

MappyField 365

"Map view & its Functionality"

Version: 6.0.0

Compatibility:

Dynamics CRM 2016 or Dynamics 365, Online or On-premises
or PowerApps

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Introduction

MappyField 365 Dynamics CRM plugin provides geo-analytical solutions to CRM users and helps them to plot CRM data in maps. It lets user choose an entity of CRM, or custom view to plot all individual records from that entity on the map. You can map multiple entities, address related to customer entities at a time. Also, you can save different user preferences as such map configurations, zoom levels, and views for future references.

In this user manual, we have explained the **Map view features** and **functionality** of MappyField 365.

*The **installation, activation,** and **configurations** of the MappyField 365 are explained in the separate user manual "MappyField 365- Installation & General Configuration".*

Prerequisites

Following point must be followed before starting the Plugin installation:

- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.
- You will have to generate **Bing Map API** key. How to generate Bing Map API Key?

New changes

As per the **MappyField 365** version **6.0**, the following topics are updated or newly added:

> Installation & Configuration side

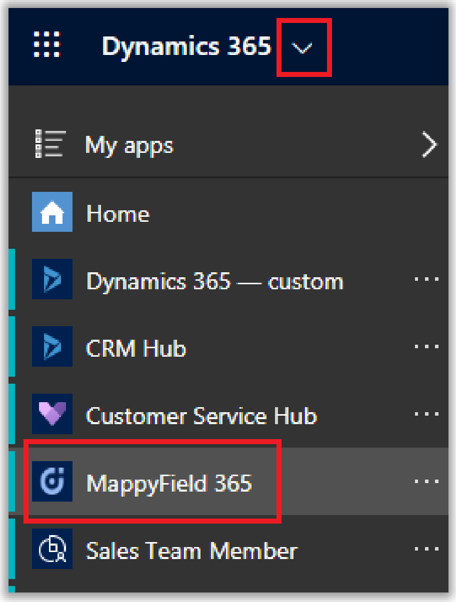
- Auto Territory assignment for accounts and leads for new records
- Auto Territory assignment for accounts and leads for existing records
- Live User Tracking – Firebase configuration
- Data Filter Attributes

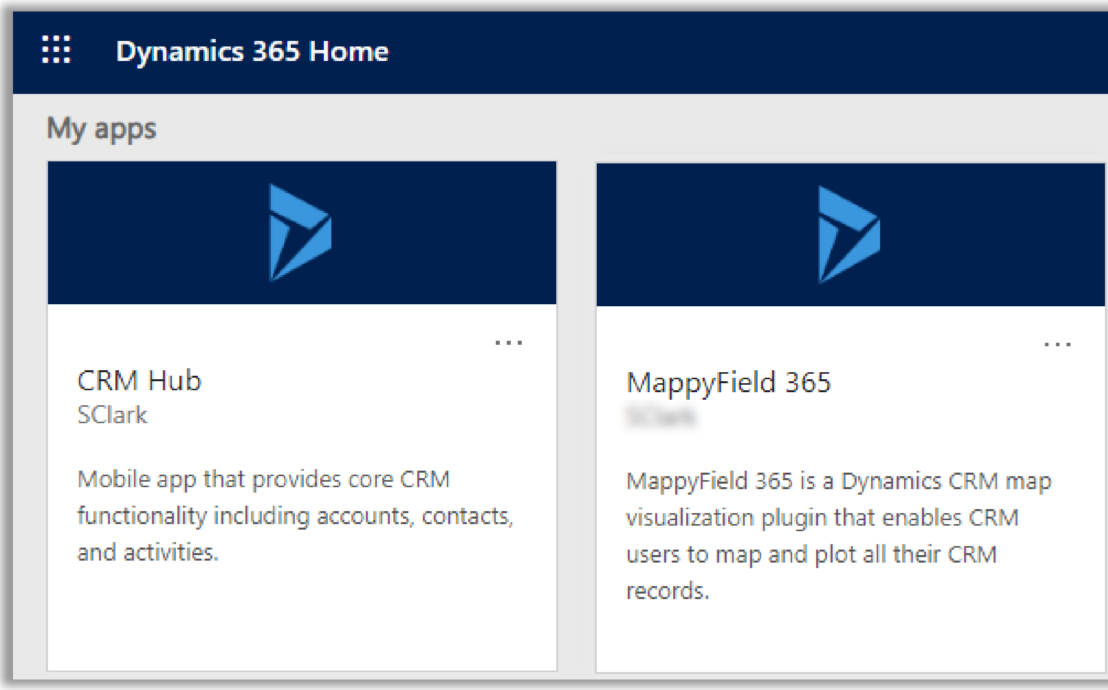
> Installation & Configuration side

- Filter Clear button
- Search By Team
- Territory Management
- Street Side View
- Adding POIs as destinations (in route)
- Reminders for record of the appointment as per Check in & Checkout appointment
- As per the Drawing selection, the Measure of that drawn area will display
- Create Tasks and Appointments directly from the Context menu on the map
- Default Template selection in map & Default Heat map view as per Template selection
- Show history of appointment check-ins checkout
- Import Territories from CSV or Excel File

Map View

- Select the **MappyField 365** from the Dynamics 365 dashboard or app list from header.





- By clicking on the MappyField 365, you will navigate to the **Map** view of the MappyField 365 with all default configurations and all the entities which are already configured in **Entity To Map**.

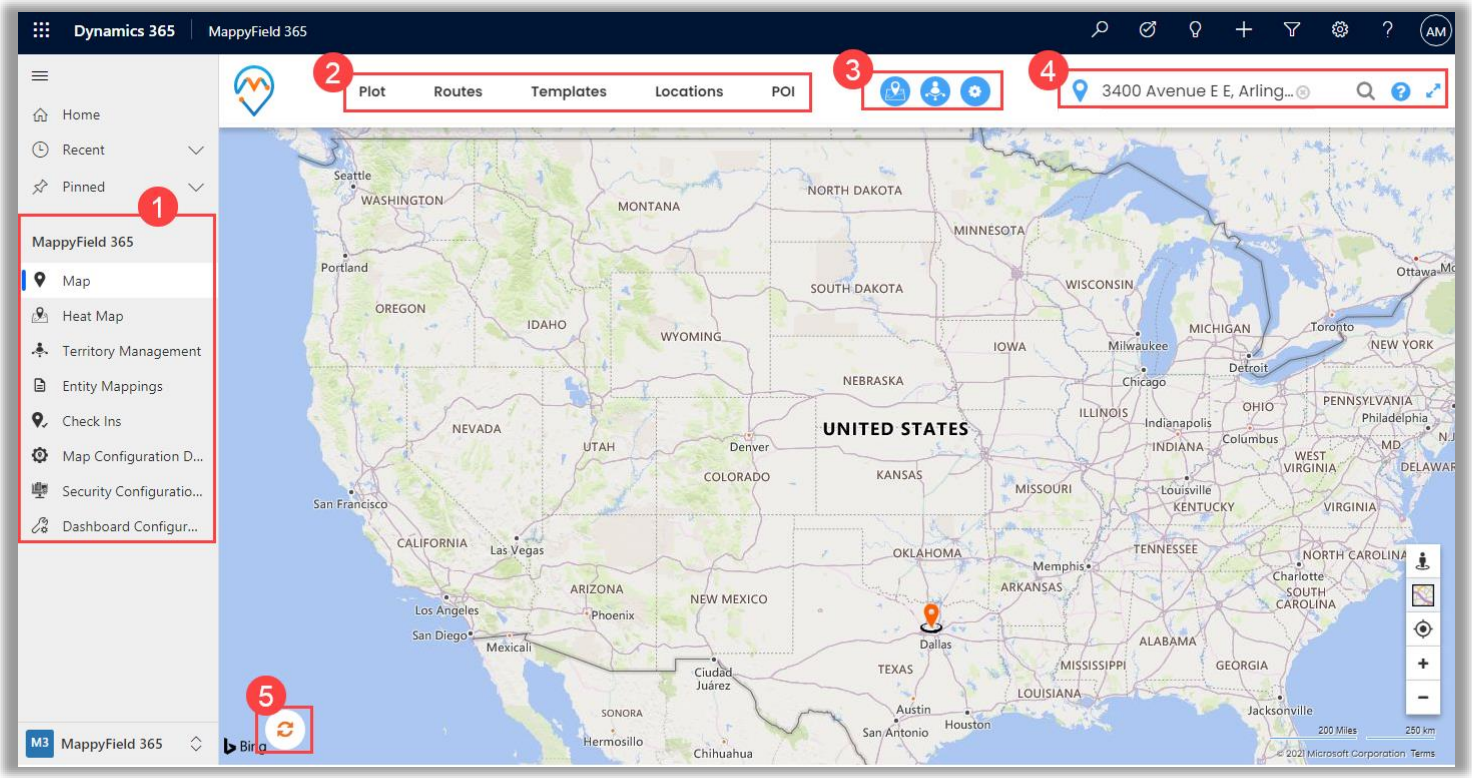
Map view & its options

- You can plot the Entity records and perform the different actions and activities from the Map.
- Map view options:

1. MappyField 365 navigation pane for the configurations.

2. You will have five tabs (options) to view and search the records by selecting the fields and options:
-> Plot -> Routes -> Templates -> Locations -> POI (Point of Interest)

3. There are three Quick Navigation are provided:
-> Heat Map -> Territory Management -> MappyField 365 Configurations (default setup).



4. The options are:

-> **Default Location** address details as per the ‘Map Configuration Detail’,

-> **Search** a specific record/location,

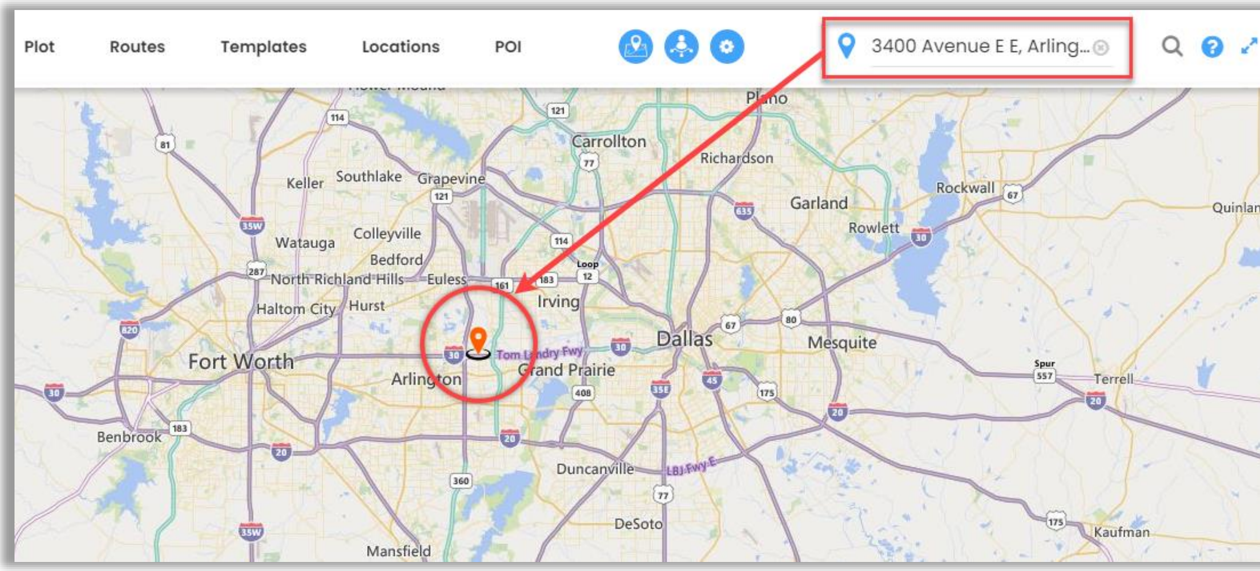
-> Get **help** related to MappyField 365,

-> **Full View** of MappyField 365 map.

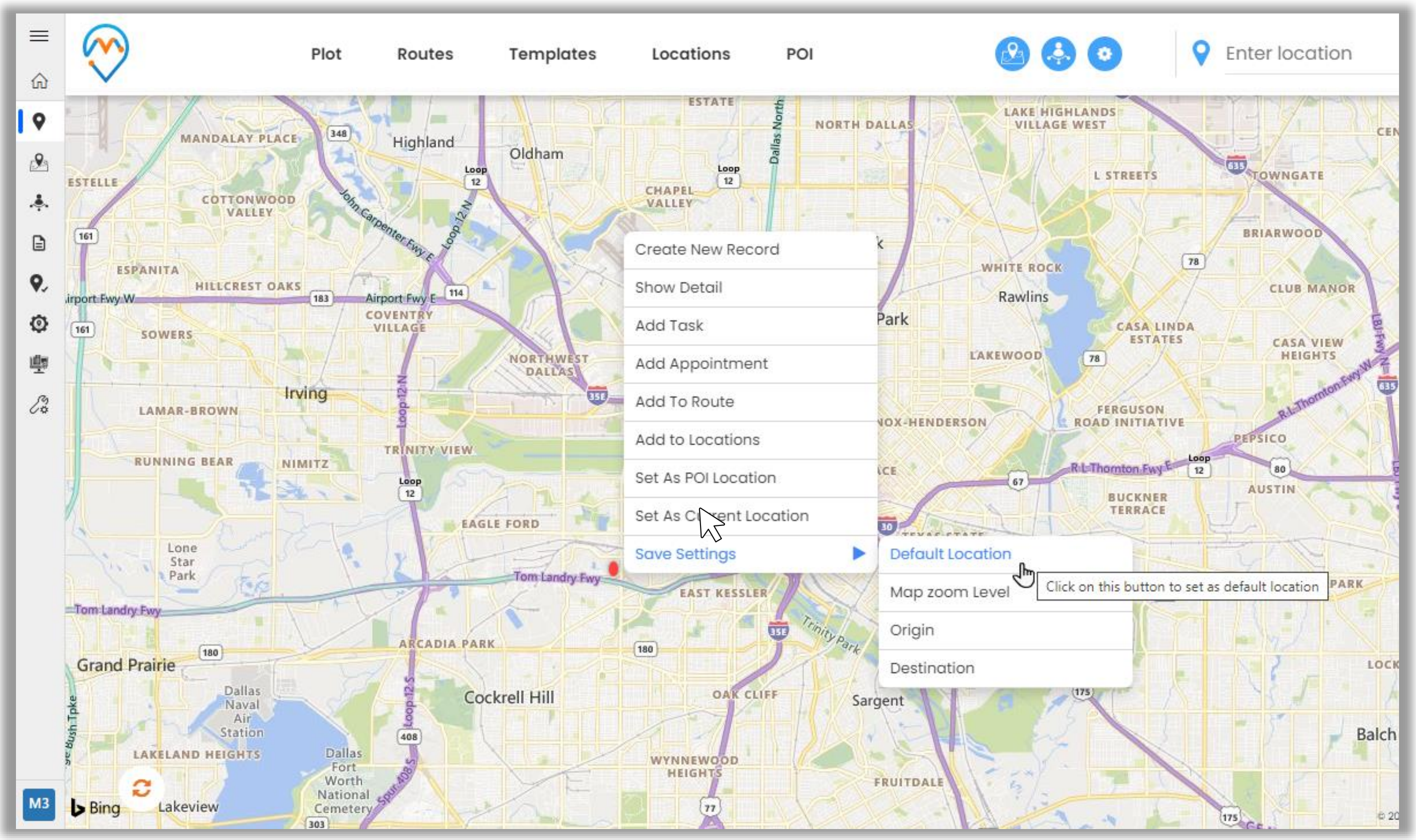
5. Refresh the MappyField 365 map.

Default Location

- You will get the default location with the pin on the map as per the configuration in **Map Configuration Detail**.

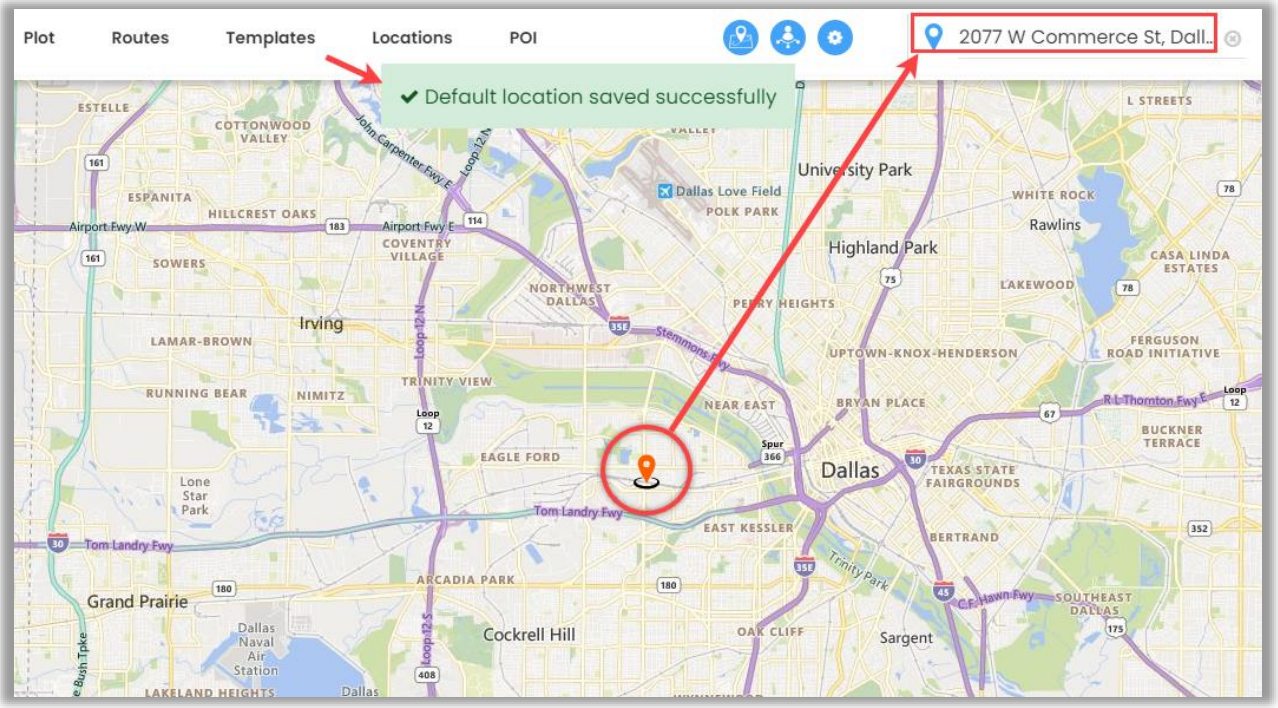


- You can set the **default location** from the Map by right-clicking on your specific location.



- As you right-clicked, the map view options will appear. Click on **Save Settings → Default Location**.

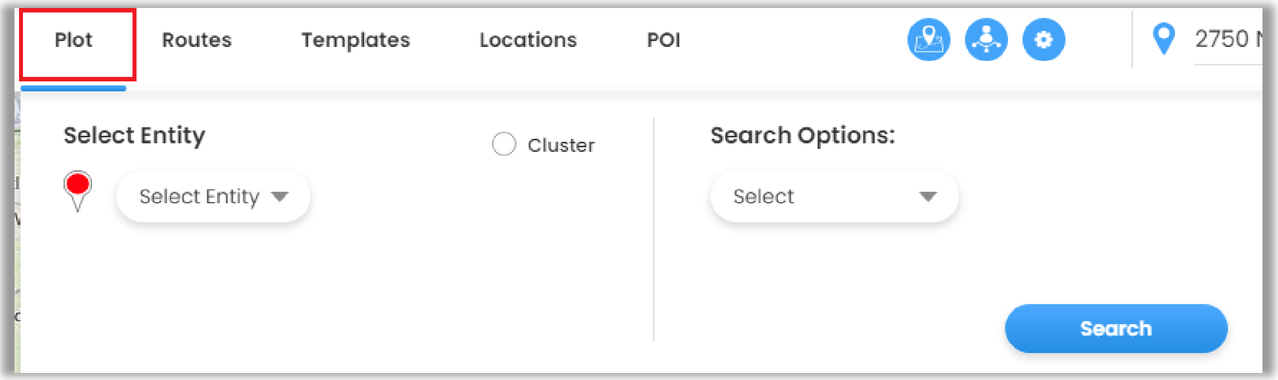
- By clicking on the ‘Default Location’, the pushpin of the default location will be changed with new address on the map.



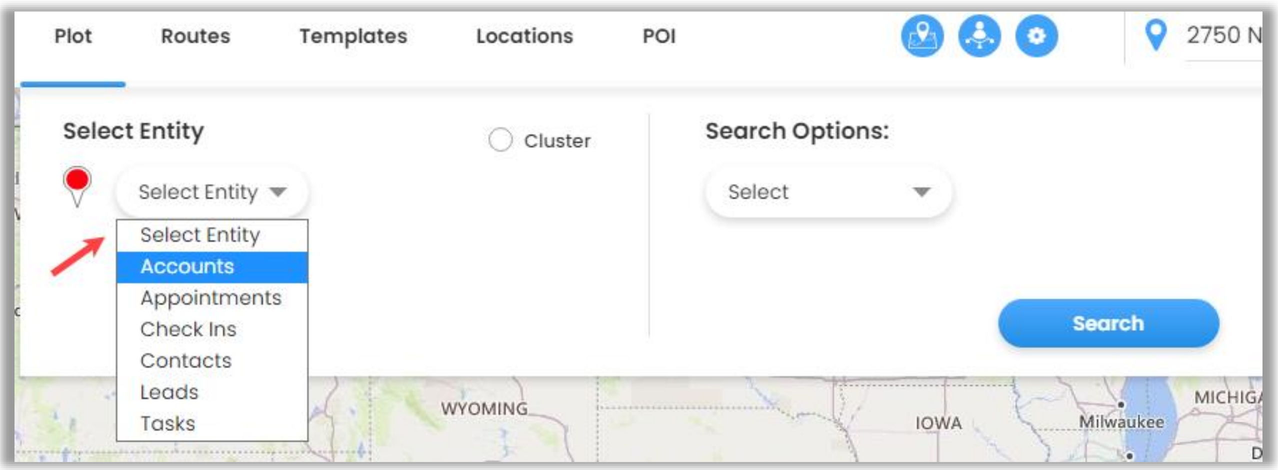
Plot the records on Map

Select Entity

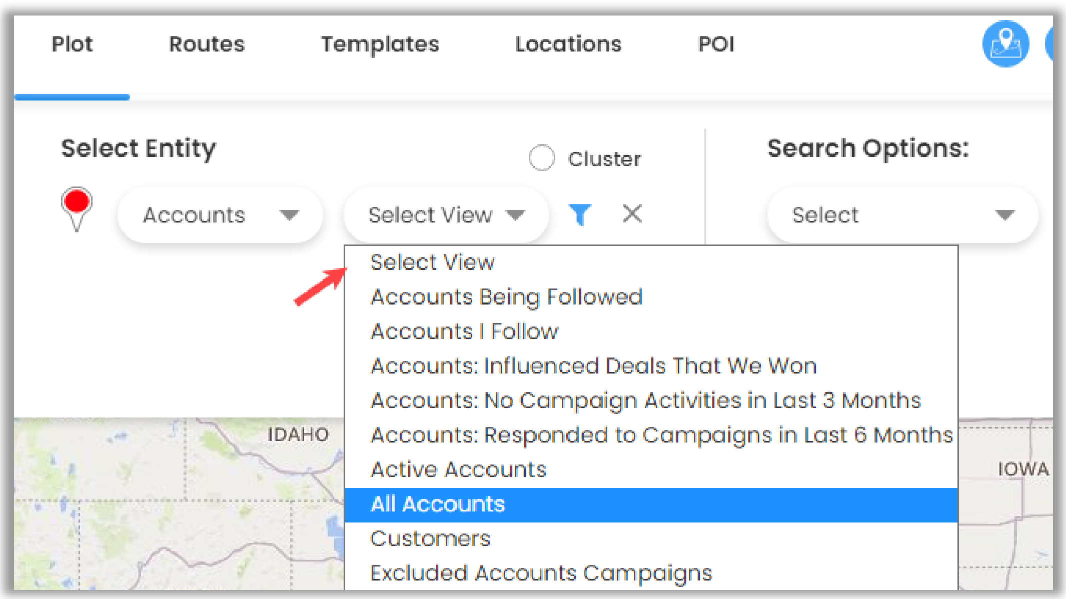
- By clicking on the **Plot**, you can plot the multiple records by selecting the different entities.



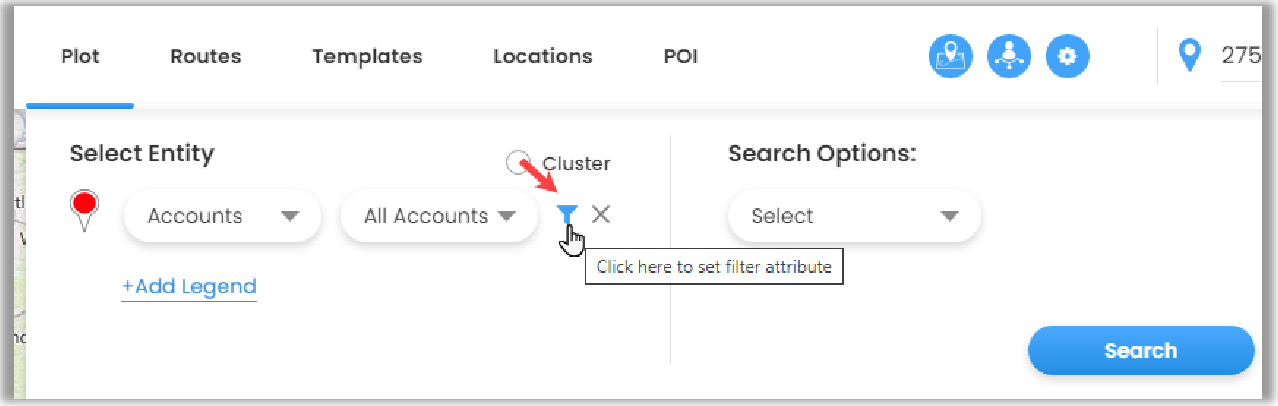
- First, select **Entity** from the 'Select Entity' dropdown option. You will get the dropdown list of entities as per mapped in 🗎 **Entity Mappings** configuration.



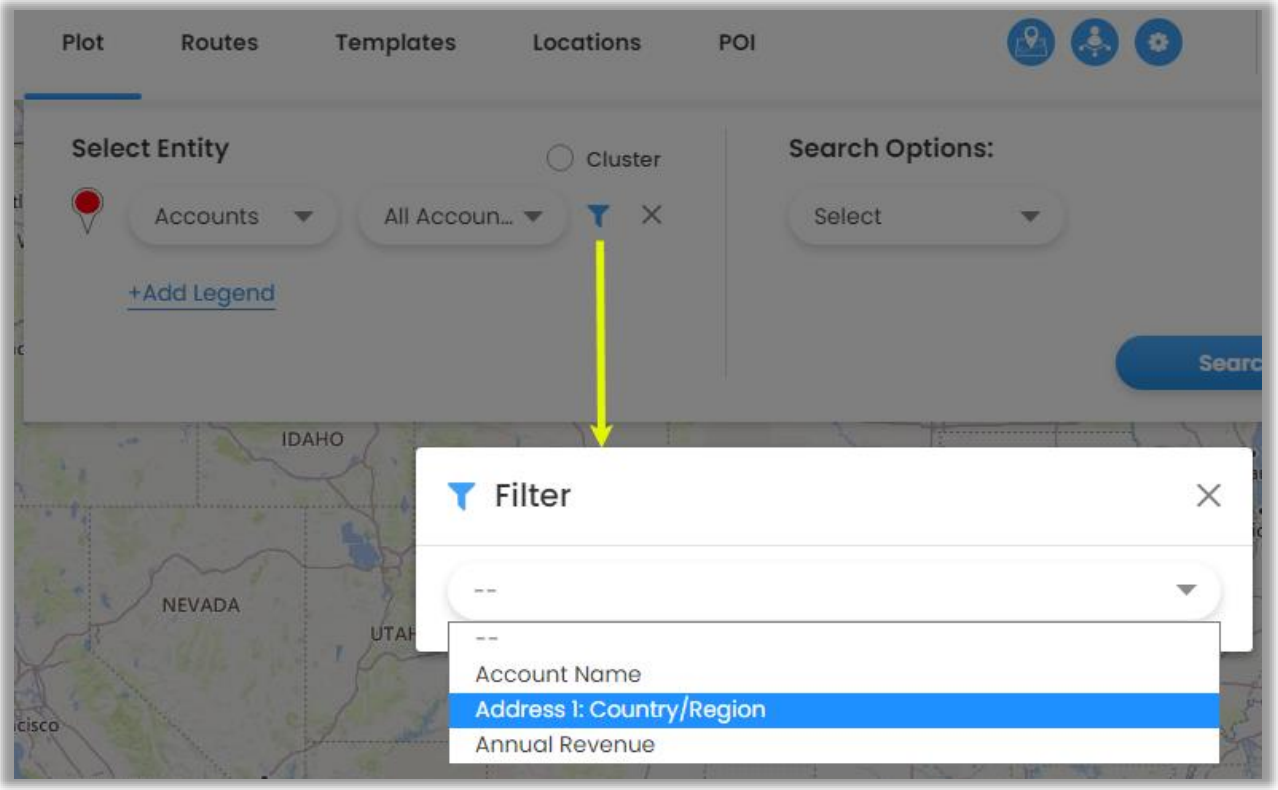
- Select **View** from the 'Select Entity' dropdown option.



- After selection of 'Entity' and its 'View', you can Filter the attributes and plot the specific records of the selected attributes from the **Filter** option.

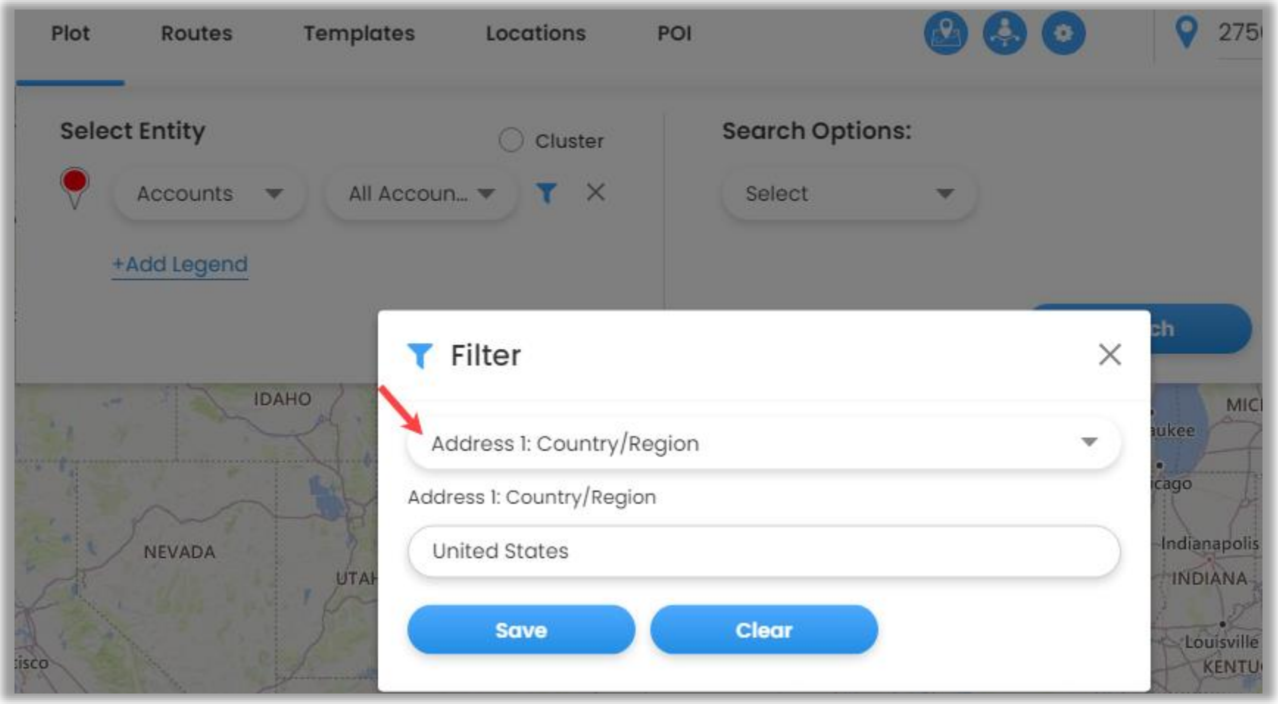


- By clicking on the 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.

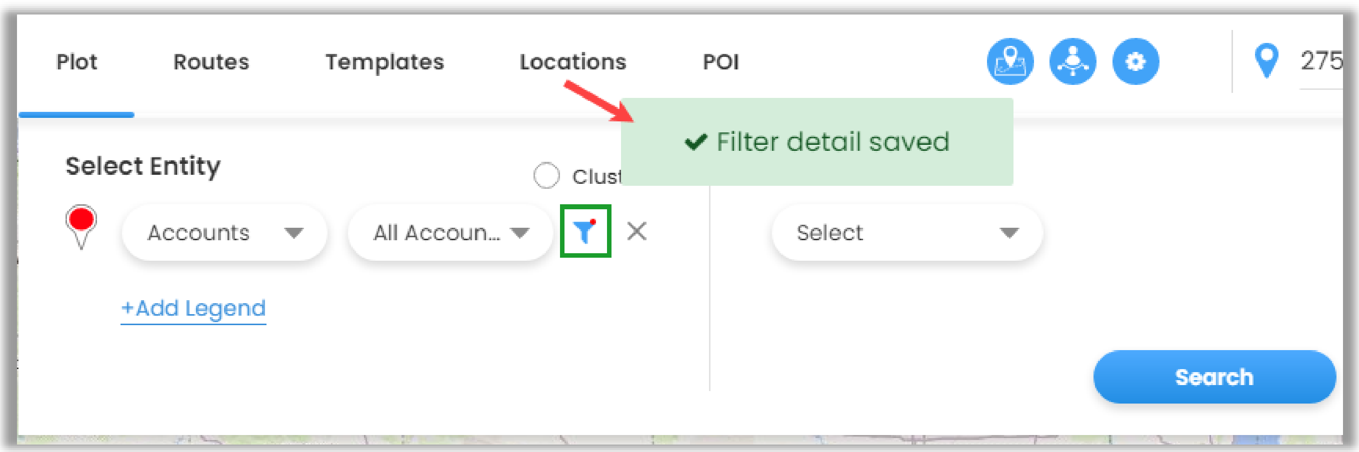


Note: You can plot the records on the map based on the attribute selection that are configured from the option of the 'Entity Mappings' in the **Data Filter Attributes** option.

- Once you have selected the Attribute, you need to insert its value. After selecting the attribute and inserting its relevant value to filter the records, click on the **Save** button.

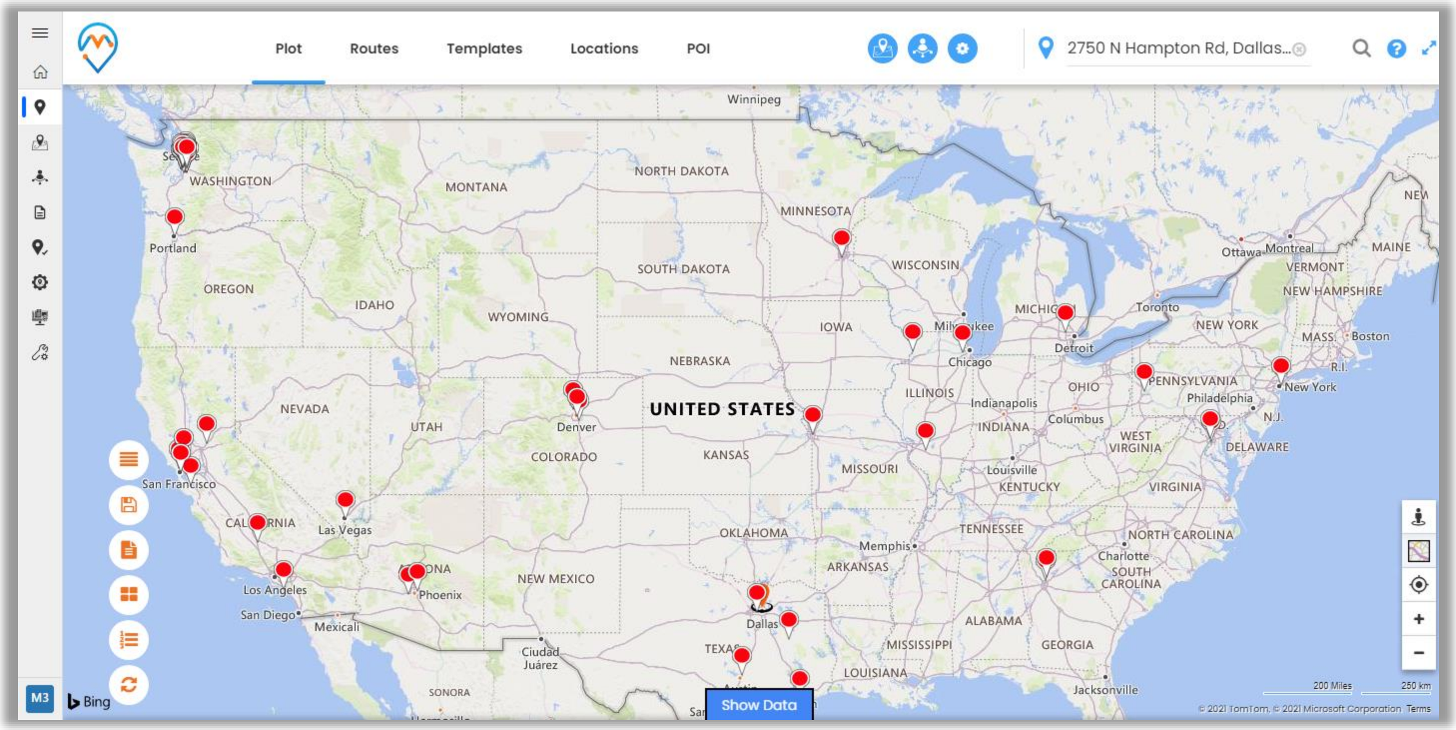


- By clicking on the 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.



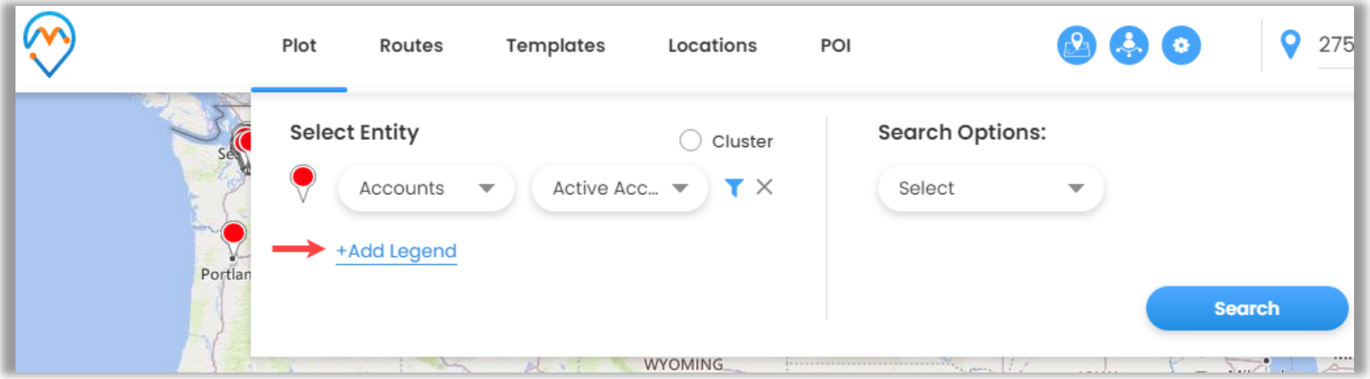
- By using the custom filters, the DynamicsCRM users can plot records between the dates or plot records with the specific status as per configuration in the **Data Filter Attributes** option from Entity Mappings.

- Now, click on **Search** button to plot and view the records of the selected entity on map.
- All the records of the ‘Accounts’ are plotted on the Map which is highlighted in the red pushpin .

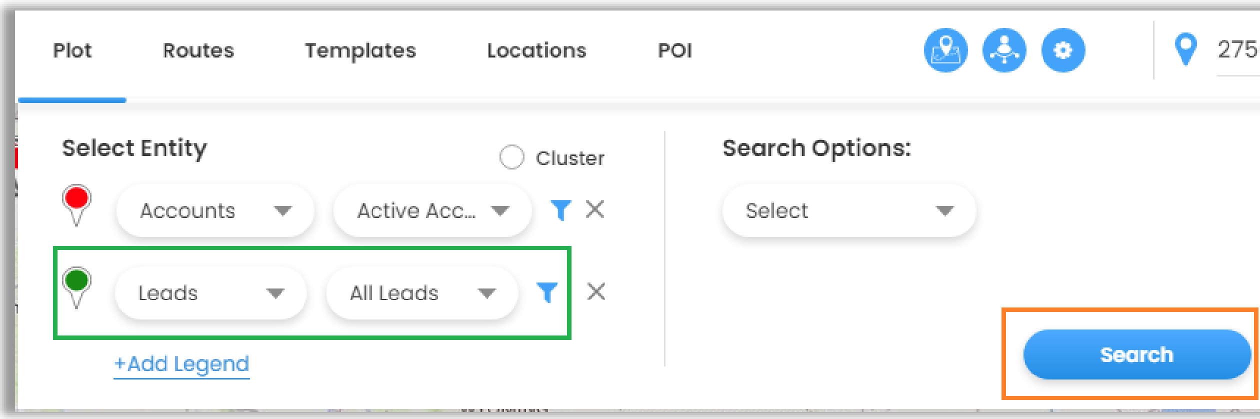


- In this way, you can plot the records by selecting the **Entity** and its attribute in the **View**. The records will be plotted as per the filtered attributed as you have selected the Filter option for the Entity.

- The multiple entities selection option is also given to plot and view the **multiple records** on the map.
- To select another 'Entity', click on **+ Add Legend** text caption. As you click on it, the "Select Entity" option will be added.

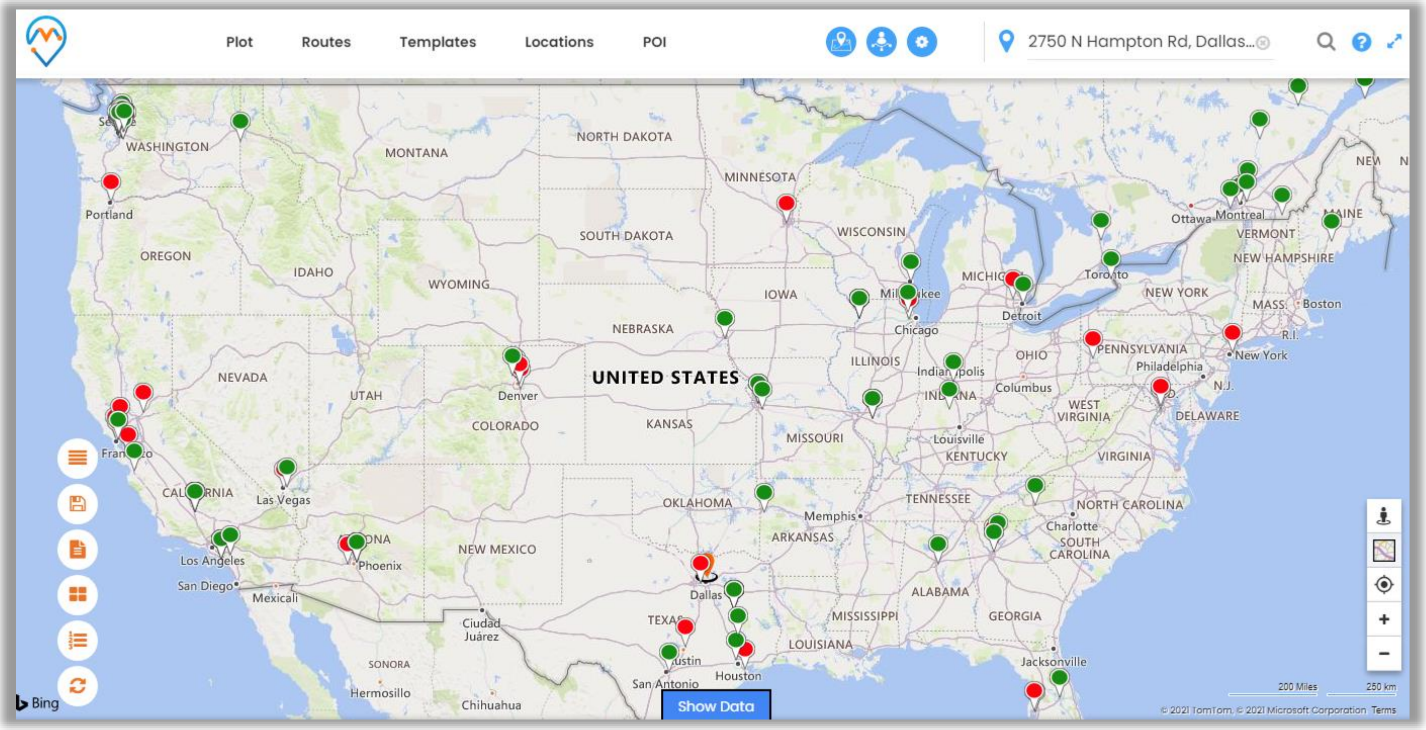


- Now, select another **Entity** and select its **View** then click on **Search** button. You can also filter the attributes of the selected entity to plot the records on the map.



- You can plot the records by selecting multiple entities, but you can select a maximum of **5 Entities** at a time.

- On selection of more than one entity, pins with different colors get plotted based on the records of entities. On map, Accounts are plotted in red pin and Leads are plotted in green pin.

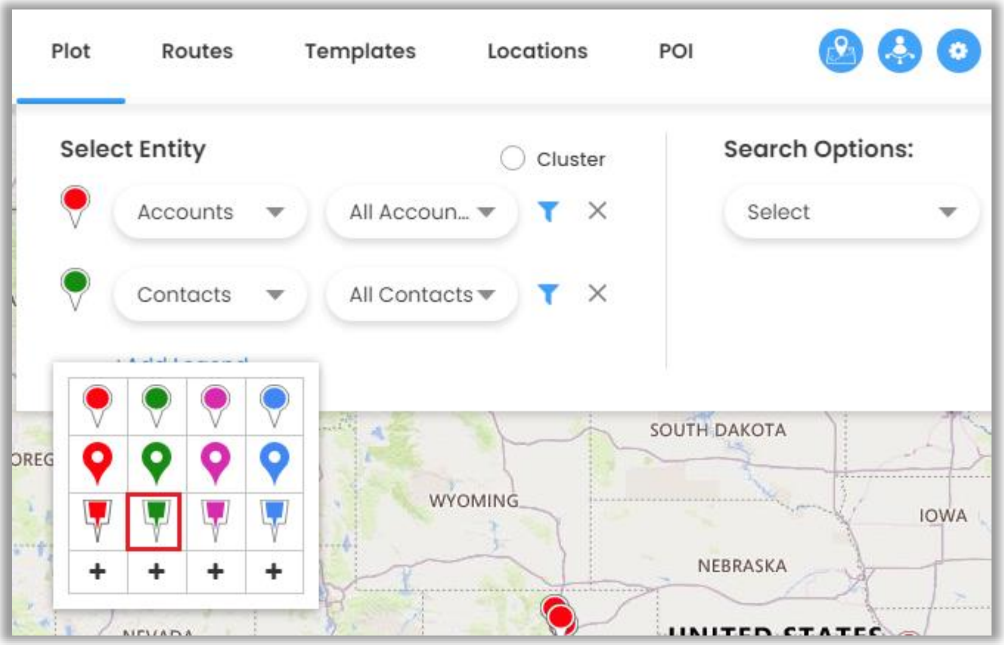


- If entities like Account, Contact or Lead are mapped under the ‘Entity Mappings’ configuration, only then you can select those entities and plot the records on the map.

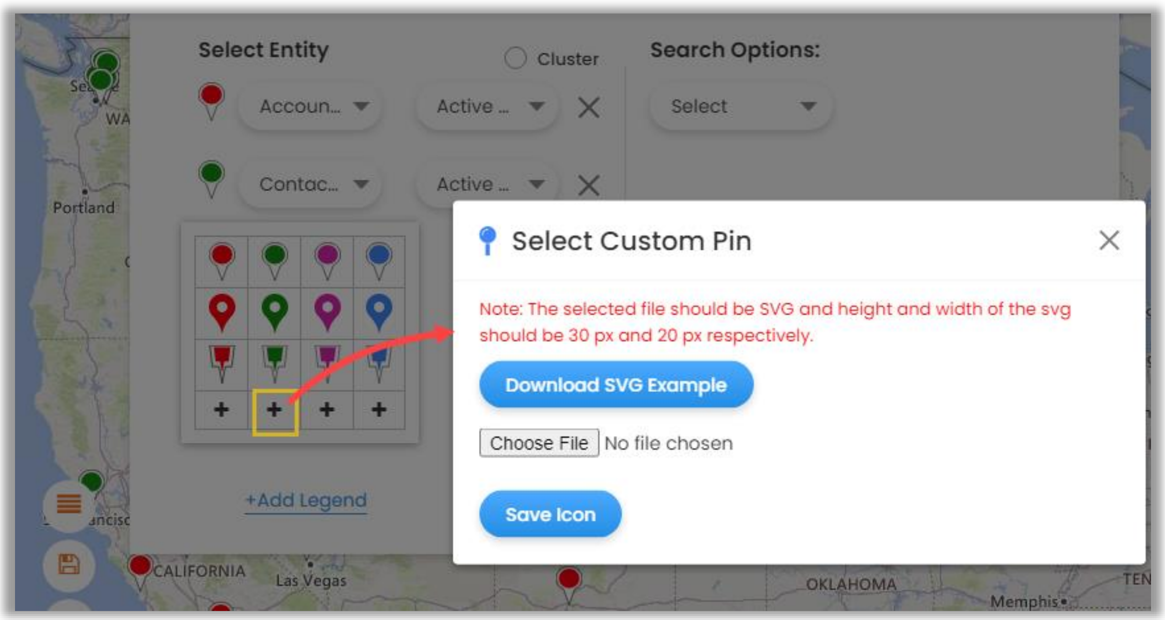
- The Sales Reps/Executive (DynamicsCRM Users) can also access the MappyField 3365 from the mobile/tab.

Pin selection for records

- Every time when you add a new entity the pin will be added with different color.
- Multiple pin options are also available to differentiate multiple entity (legend) records, options will be listed by clicking on existing pin.
- You can change the pin color and its shape by clicking on the pin of any entity. Select different pins for the multiple entities to differentiate the records on the map.

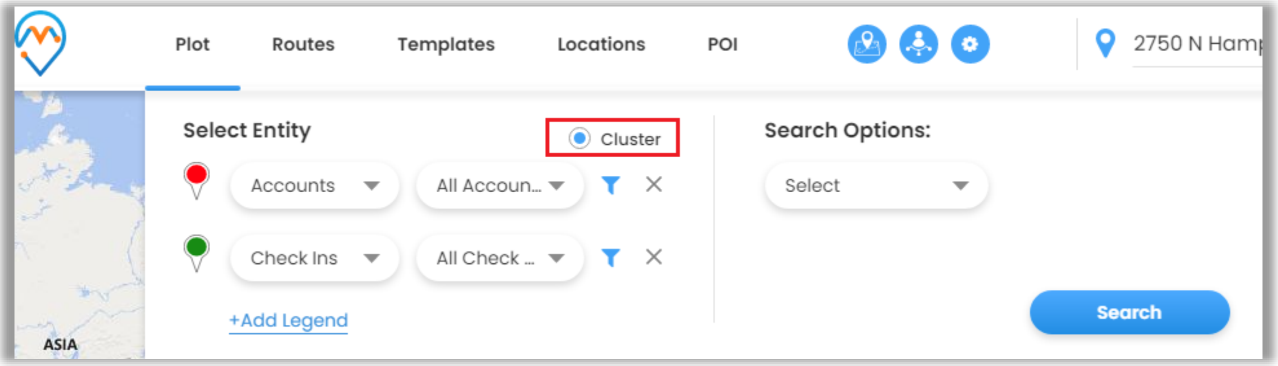


- You can also add your custom pushpin icon by clicking on the plus **+** icon. You need to select the SVG file.

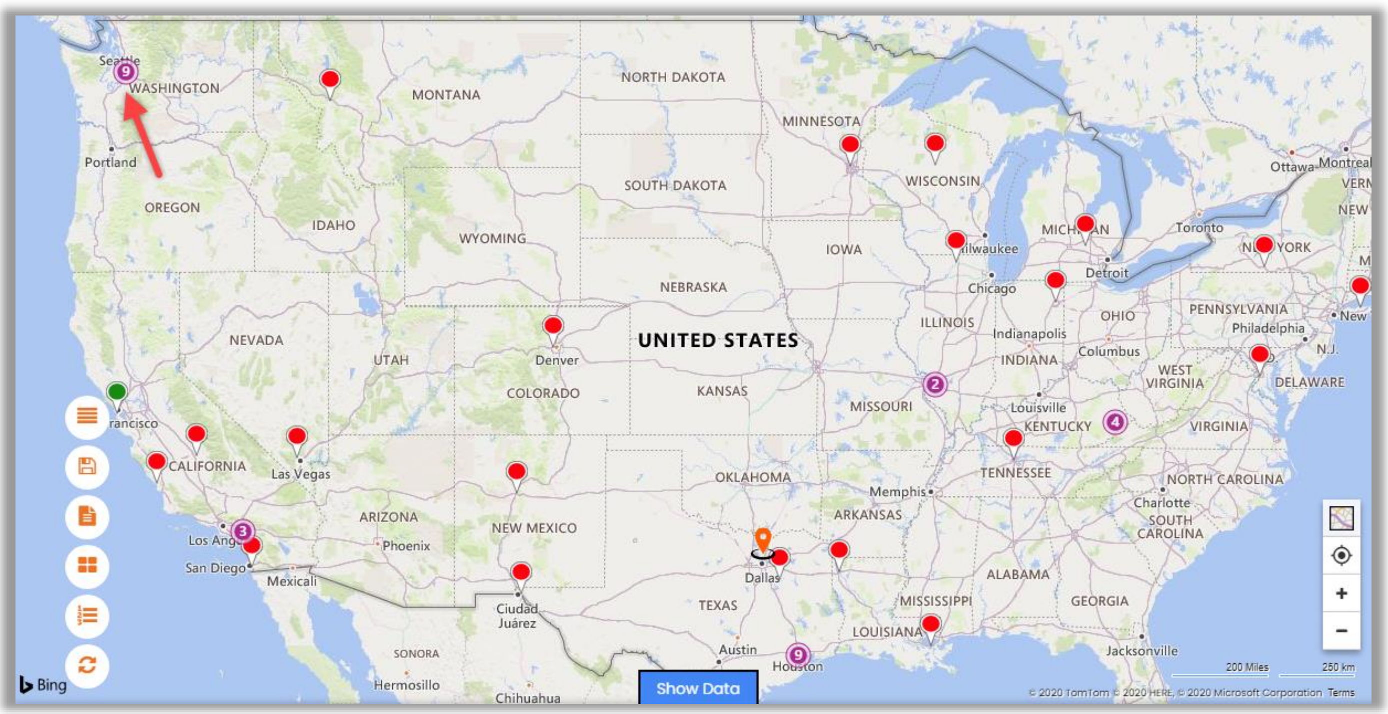


Cluster Map Records

- For all the pins added on the map, there is an option available to cluster them.



- By selecting the Cluster option, the pins will get clustered based on the proximity. It will make a group of nearby pins indicating the number of markers.



Note:

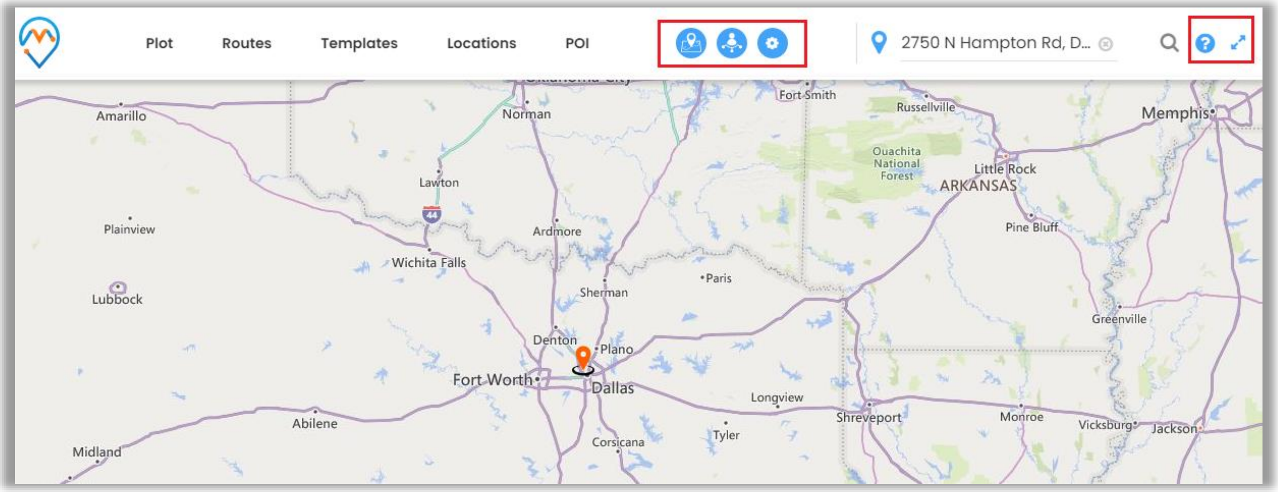
- On zooming in to the map, number of pins in the cluster decreases and you get to see individual markers on map. (left image)

- Whereas, when zoomed out, it consolidates the markers into clusters again. (right side image)

- On clicking any cluster (no. of groups), it will show all the pins in spider cluster form .

Map view Quick options

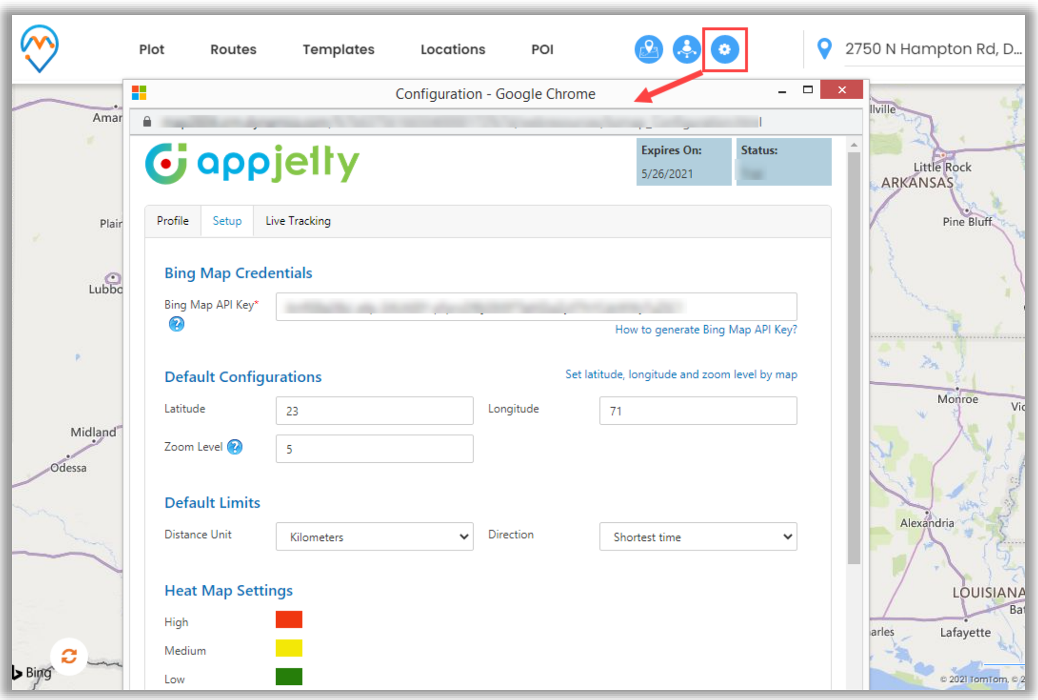
- You will find some quick actions from the header menu of the activity map. The Quick actions are:
  - Heat Map
  - Territory Management
  - MappyField365 Configuration
  - Help
  - Full Screen view



- It will be easy to perform some action from the map itself, you will not require to navigate the individual options. Quick actions for Heat Map & Territory Management are explained in the individual topics.

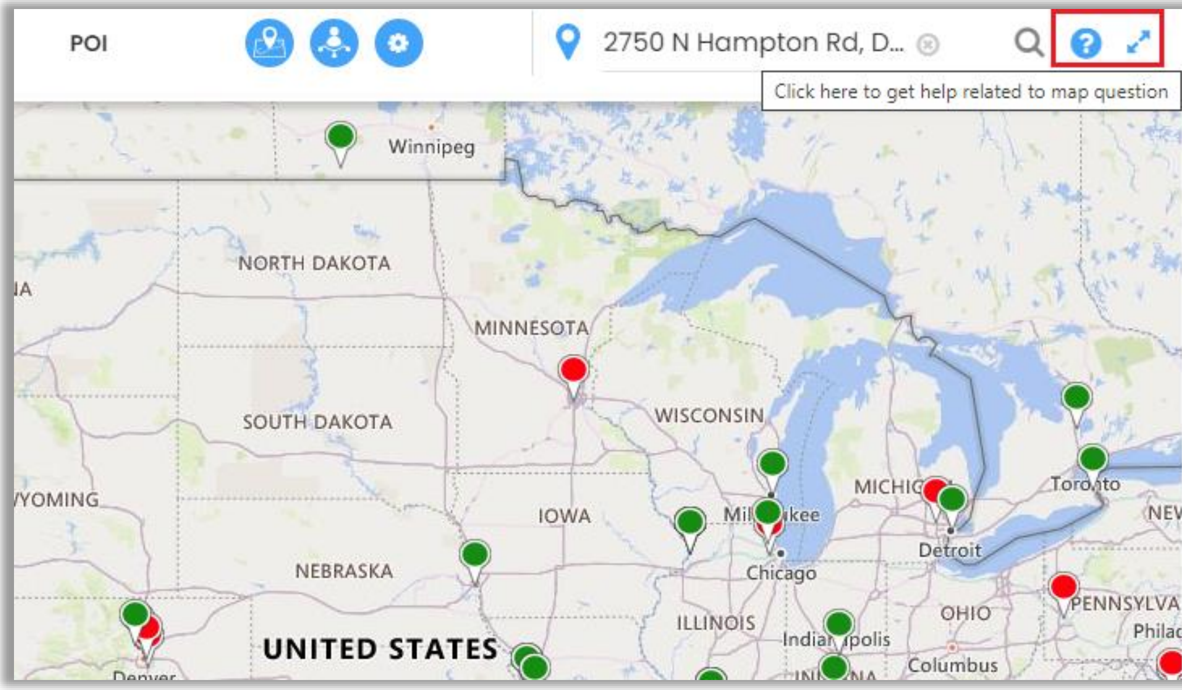
MappyField 365 Configuration

- You can navigate to the default set up of the MappyField 365.



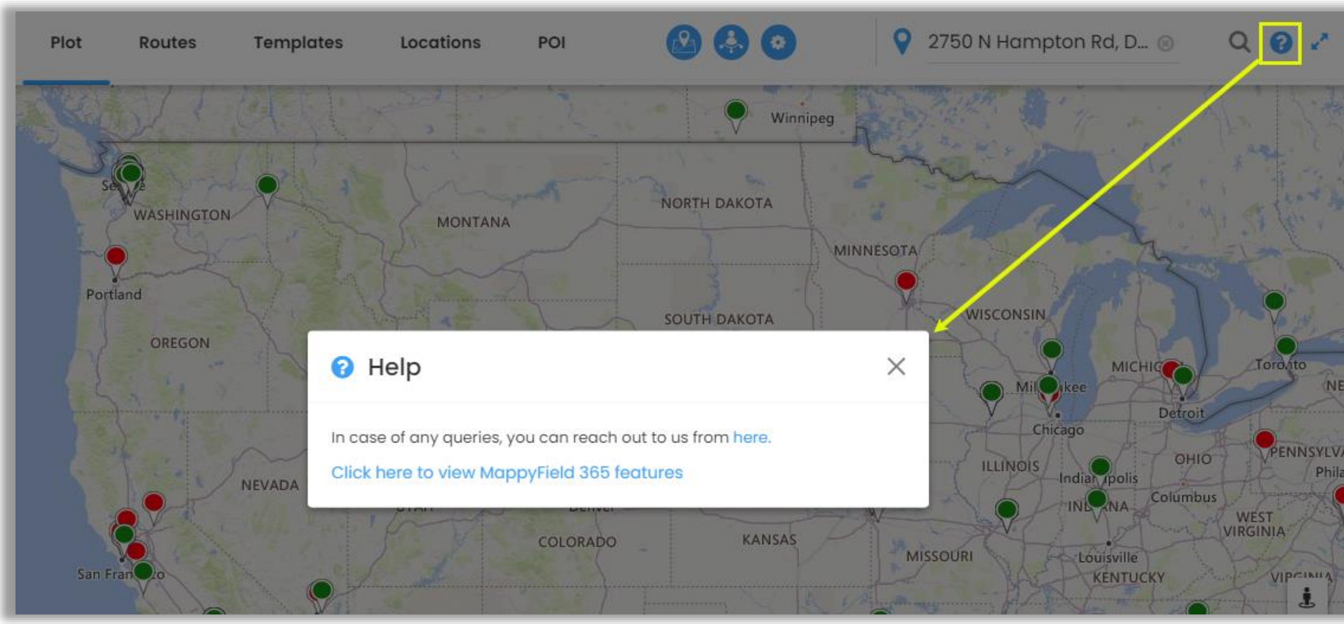
Help & Full Screen

- From the right side on the MappyField365 header, there are two options are provided: → Help → Full Screen View.



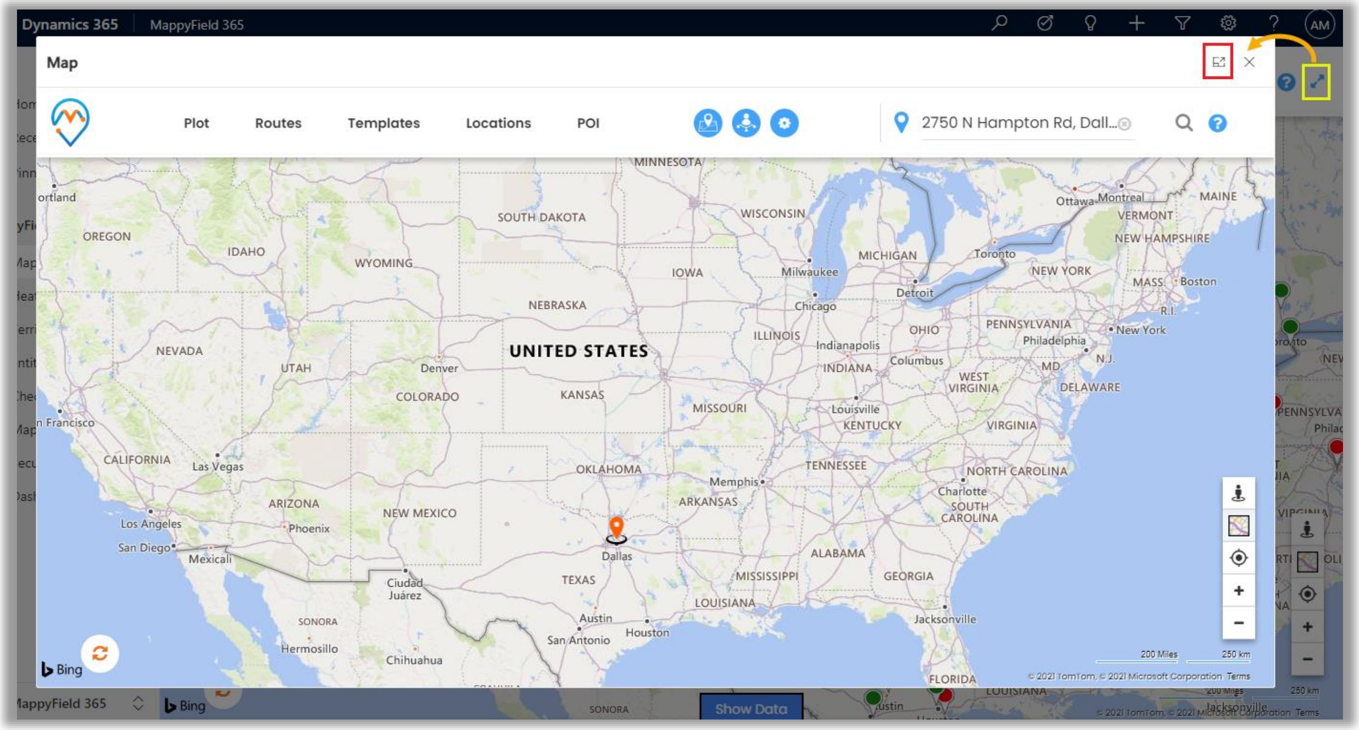
Help

- You will get the Help option regarding the MappyField 365.

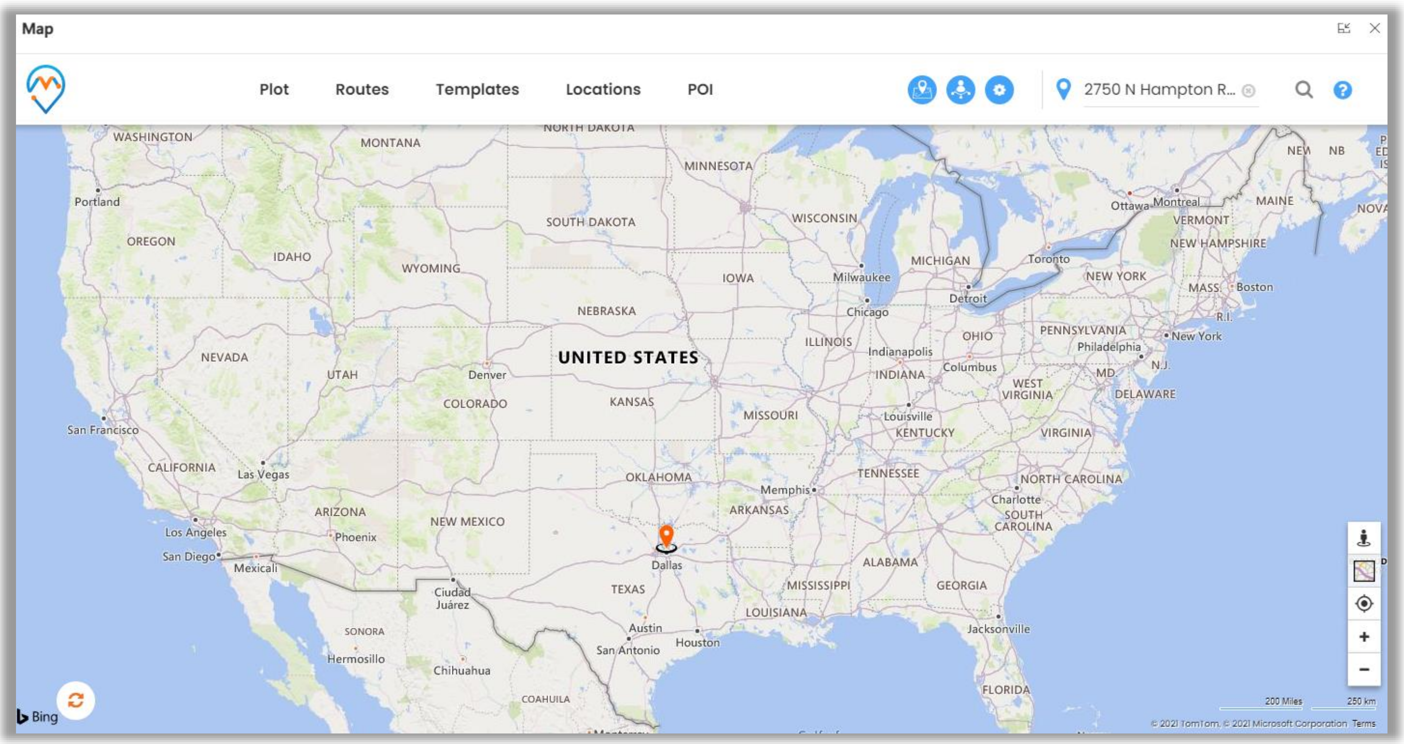


Full Screen View

- You can enter the Full screen view.

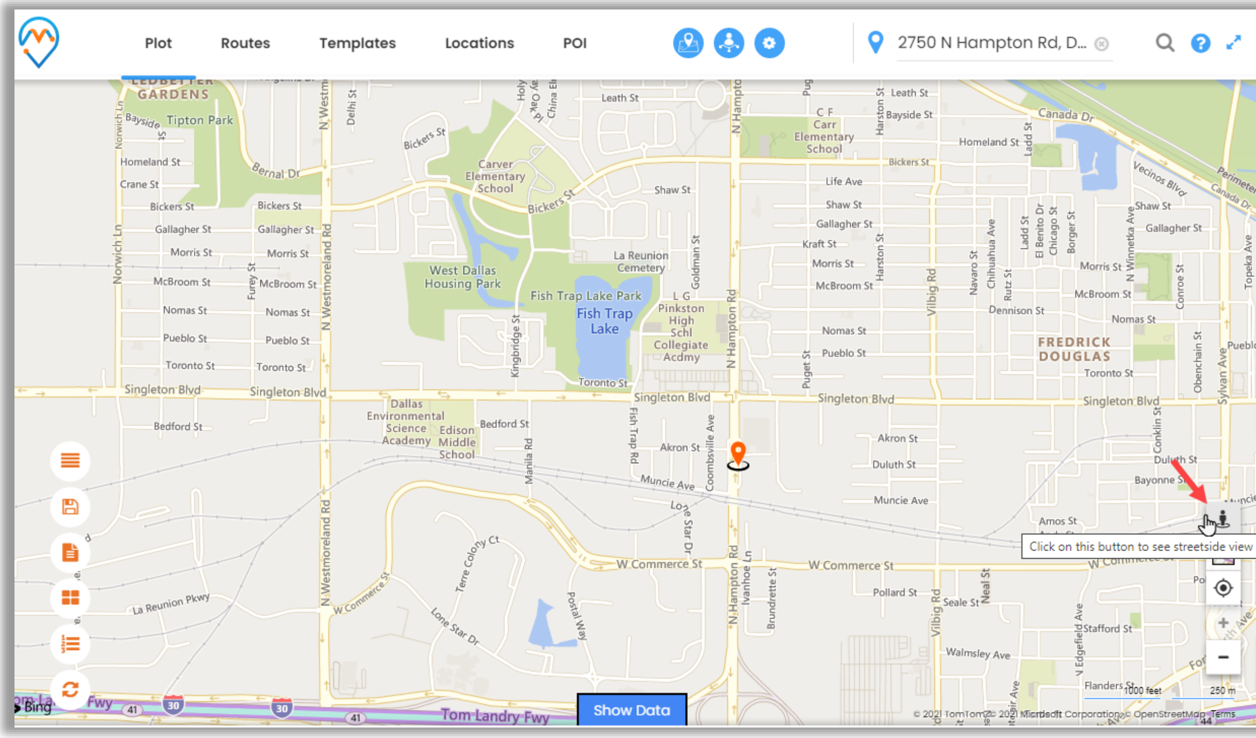


- By clicking on the ‘Full screen’ icon, the map view will open in the Full screen view.

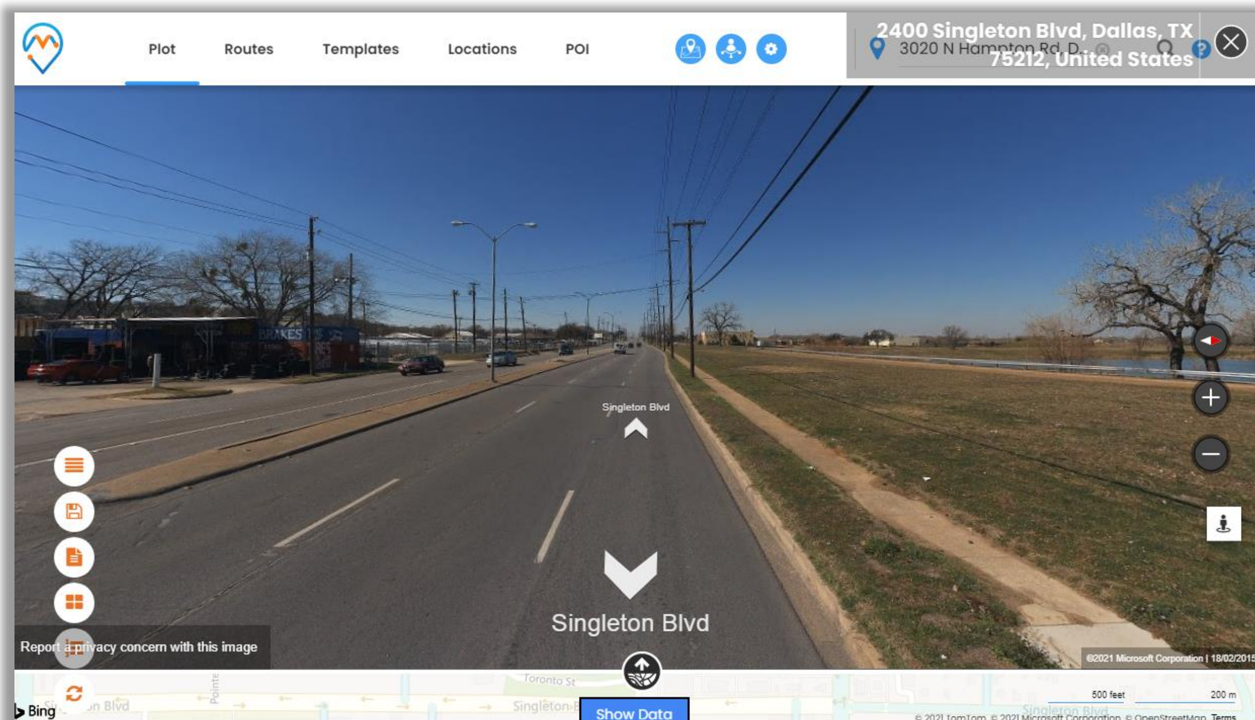


Street Side Views

- From the Map, the street side view option is provided to check the street view of the location.

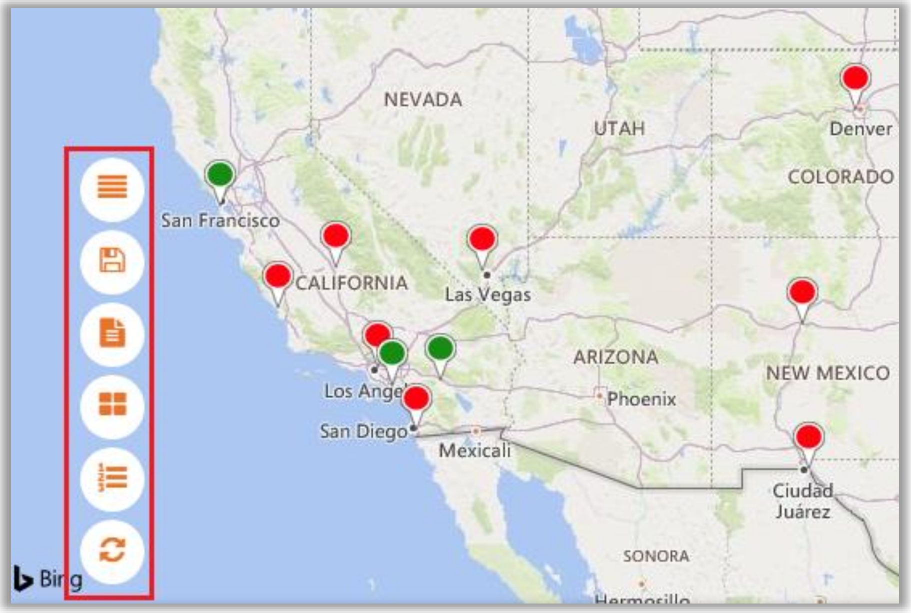


- You will get the Street view of the Bing maps.



Advance Options

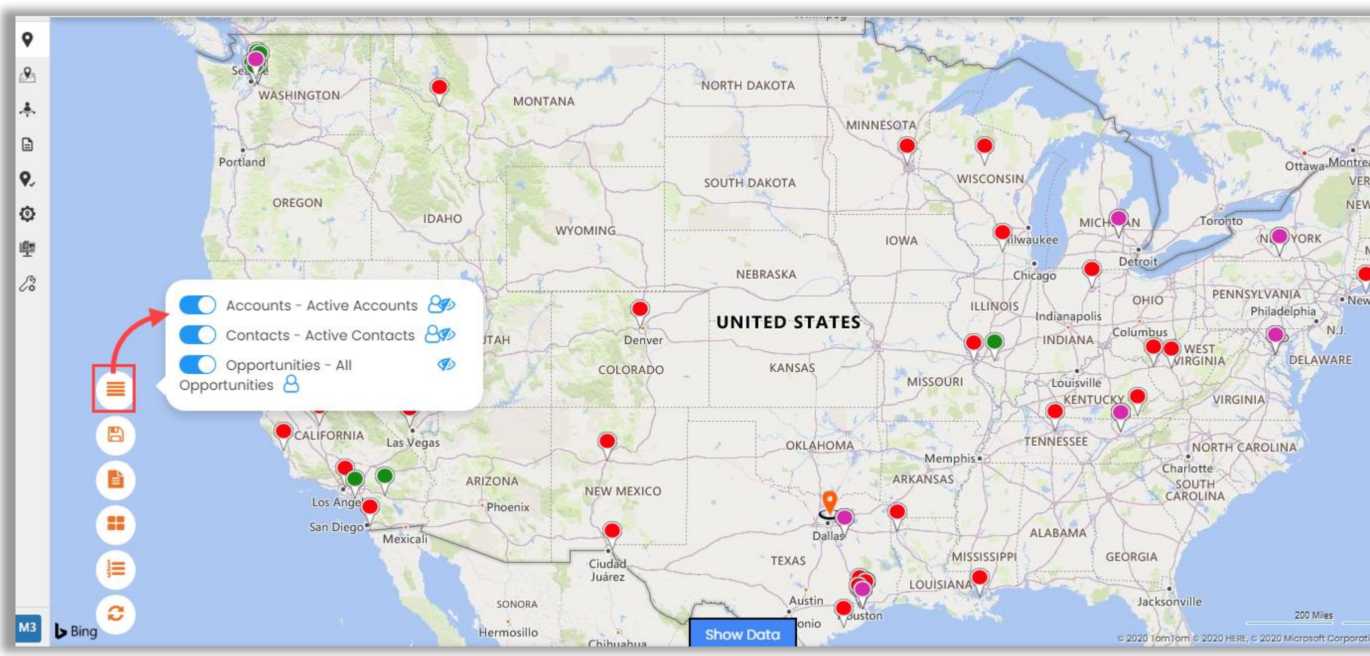
- From the left side of the MappyField map view, there are Advance options are given related to check, manage and configure the records on the map.



- Layer Card
- Save as Template
- Marketing List
- Select Category (Category wise Search)
- Summary Card
- Refresh

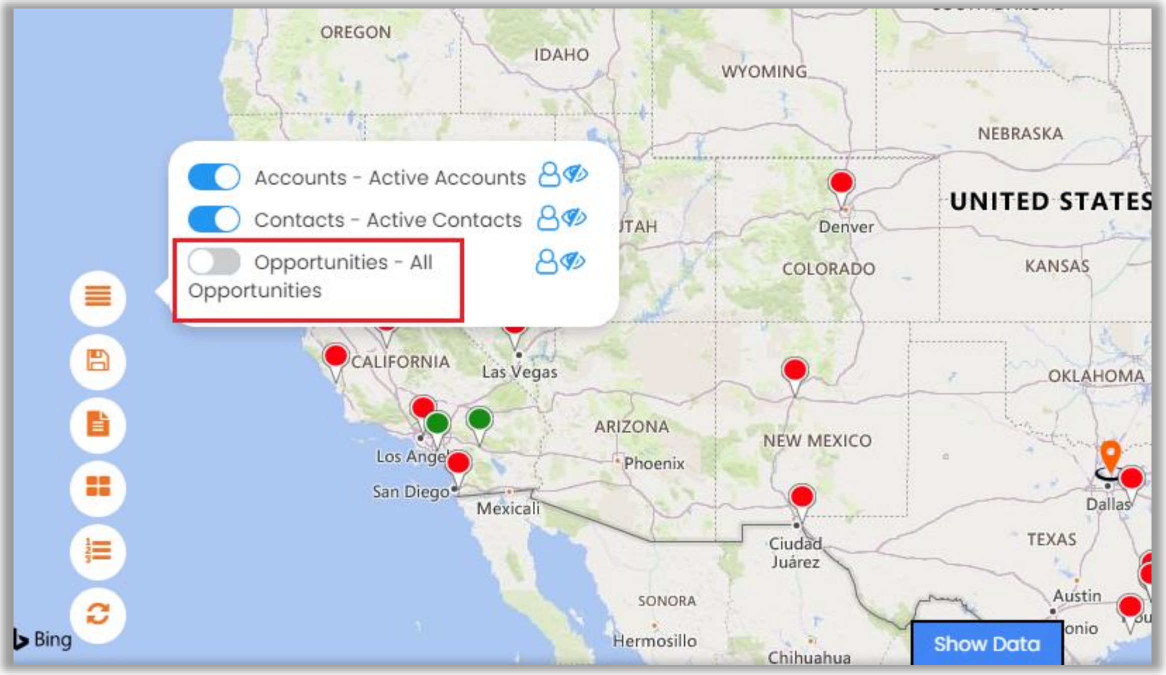
Layer Card

- With every plotting records on the map, it would show each plotting as Layer menu.
- **Layer Card (Layer Menu)** displays all plotted record of the entities in one place.

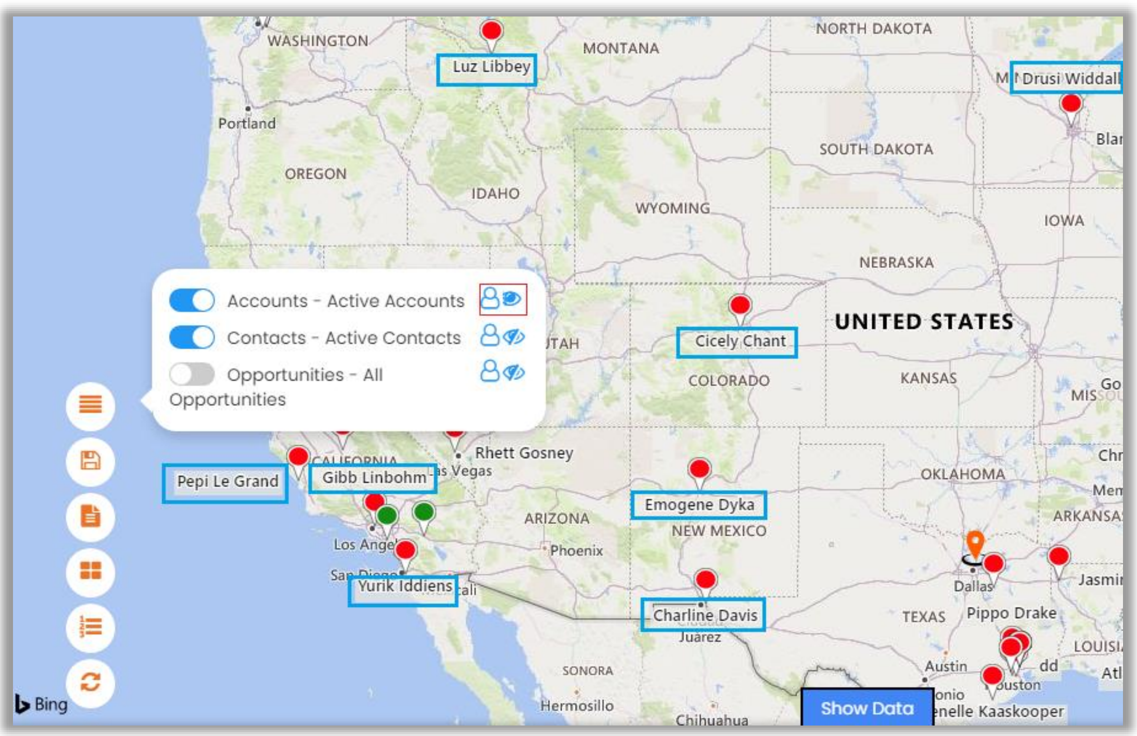


- From the ‘Layer Card’, you can **hide/show** the records on the map and **visible/invisible** the ‘labels’ of the pushpins.

- When the records are plotted for more than one entity on the map, you can **hide** any **entity** for a while to check and manage plotted records of other entities without removing the entity.
- Here the 'Opportunities' is **hidden** from the map. So, you cannot see the pushpins of the Opportunity entity on the map.



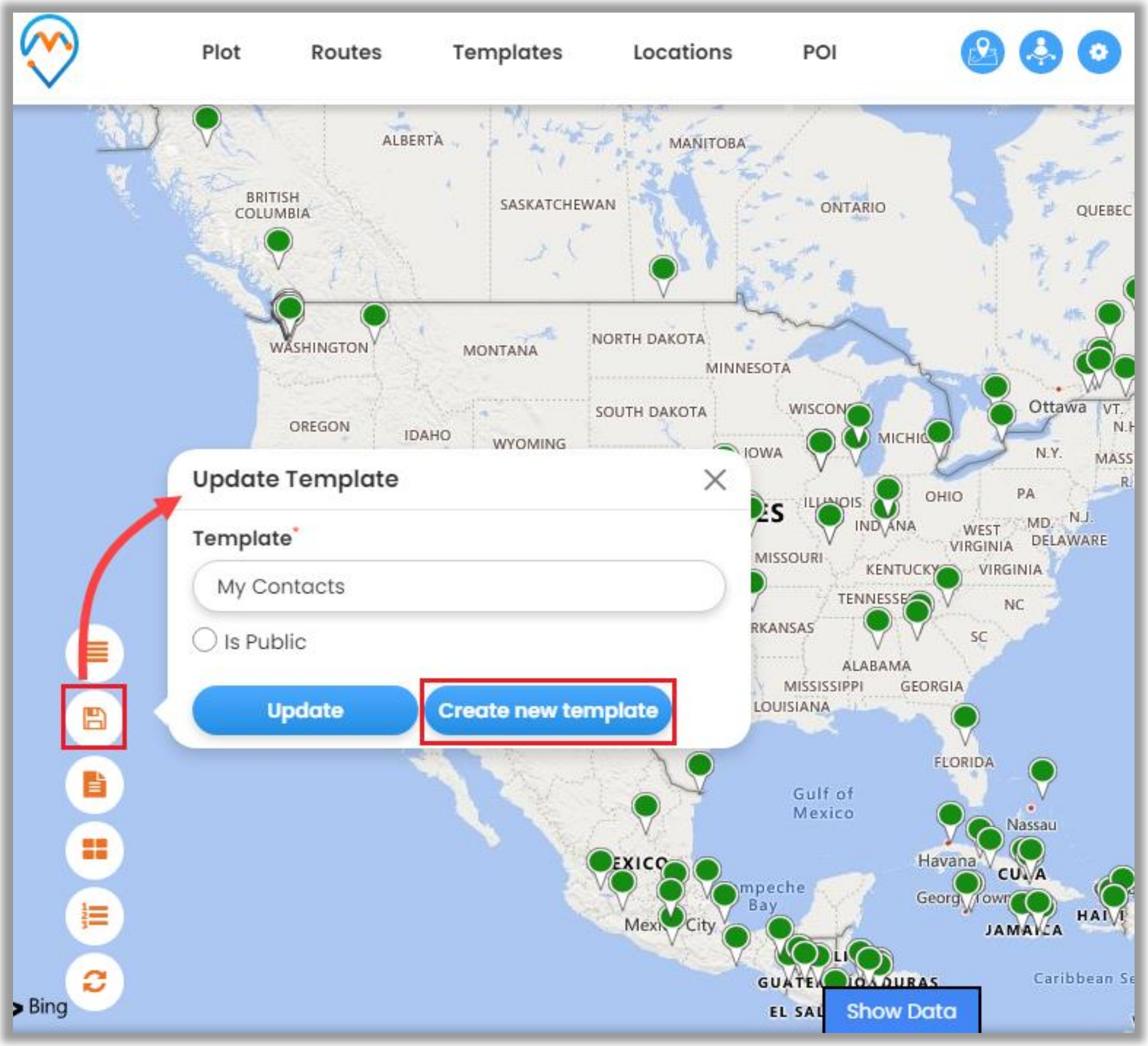
- By clicking on the Invisible icon of any entity, the icon will turn in to visible and you can view the **labels** of the **records**.



- By making the 'visible' icon of the Accounts, the label (name) of the accounts will be visible on the map.

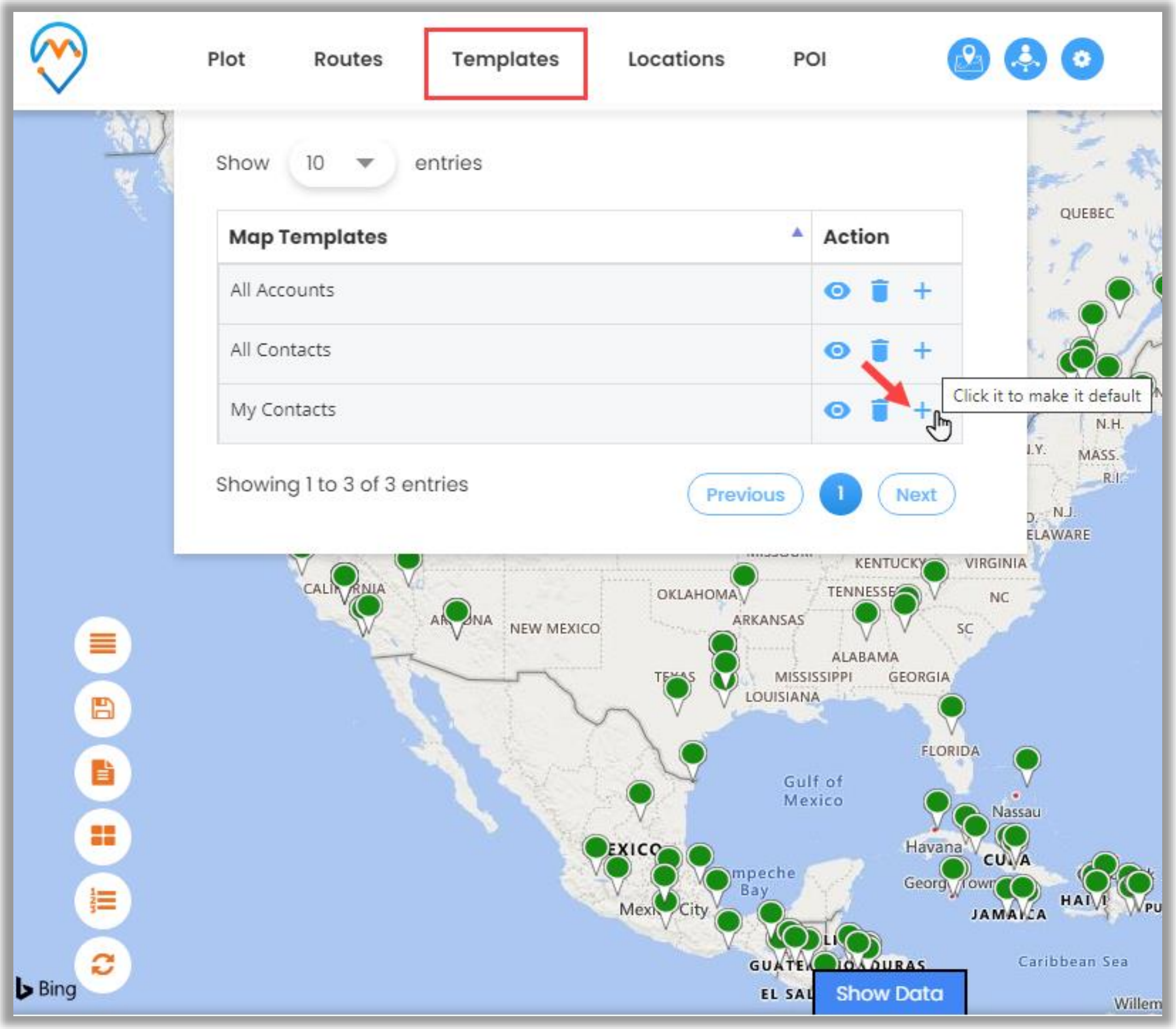
Save Template

- All the plotting data made along with zoom level configurations can be saved as a **Template**.
- By clicking on **Save Template** icon, a dialog box opens to give a name to the template. Moreover, you can select the box **Is Public** to make the template public. To save the existing template, click on the **Update** button.



- After inserting the Template name, click on **Create new template** button to save the template for future reference.

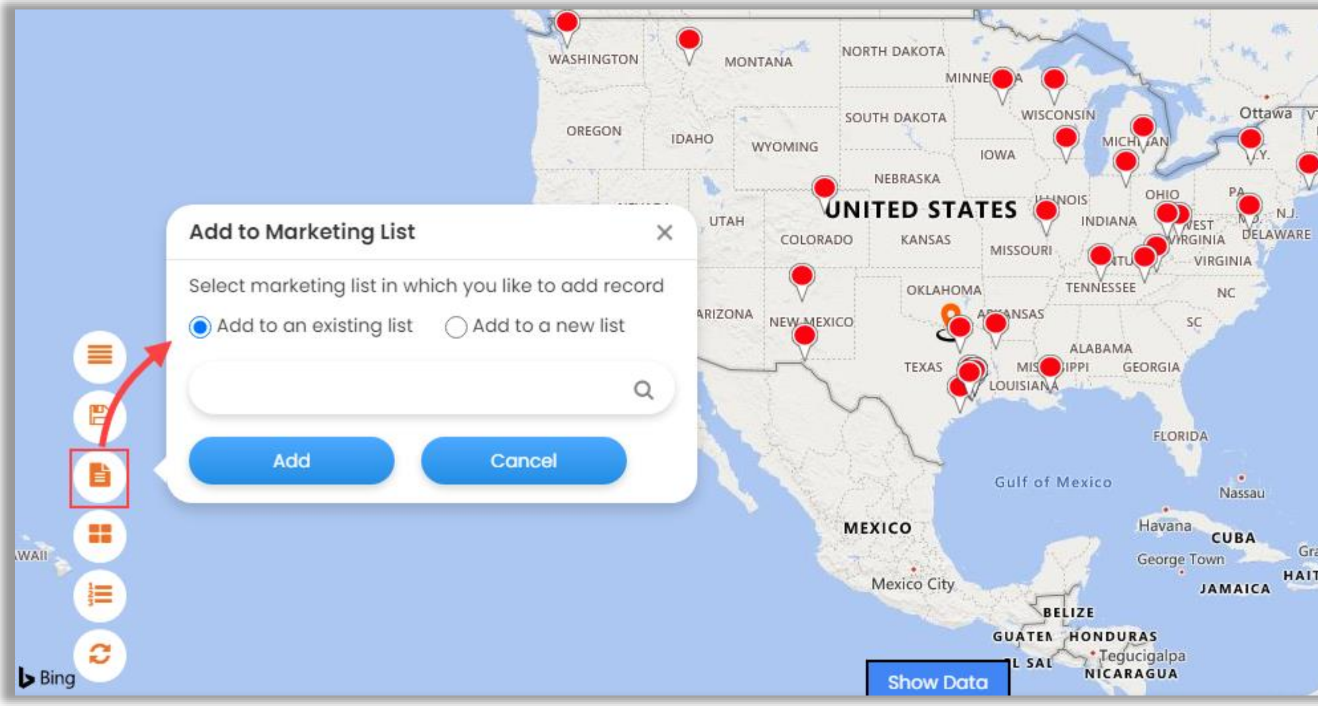
- You can check the saved templates from the **Templates** tab from the header.



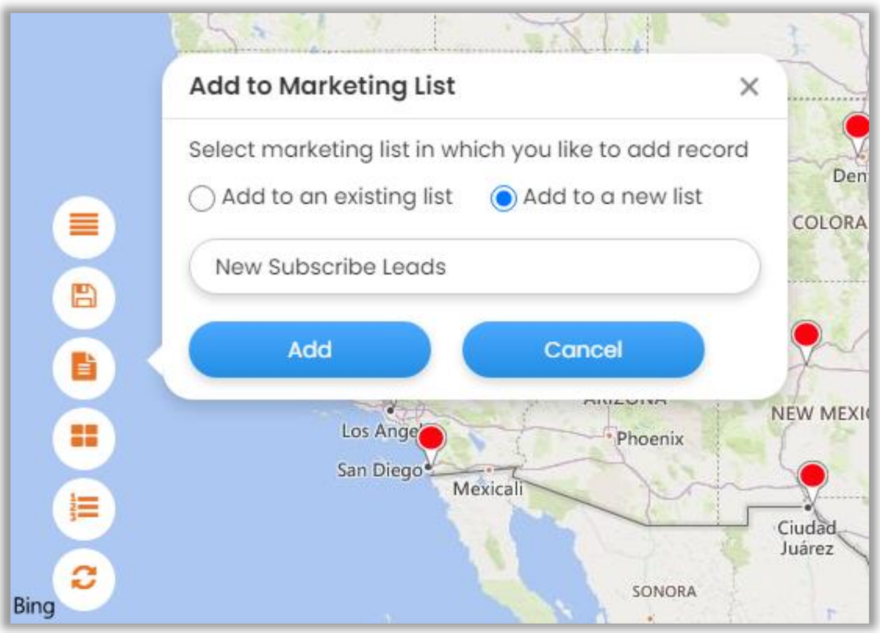
- To make a default template, click on the **+** icon, it will be set as default template and when you (or any CRM users) will navigate to the activity map (Map), it will load with the default template records.
- By clicking on the view icon, you can view the records of that template on the map. You can also delete any unwanted template by clicking on the delete icon.

Marketing List

- Marketing list contain the members like Account, Contact or Lead records. You can add the MappyField 365 data in any marketing list to market the specific segments more effectively.
- By clicking on 'Marketing List' icon under the "Select Entity" option, you will get the Add to Marketing List popup window.



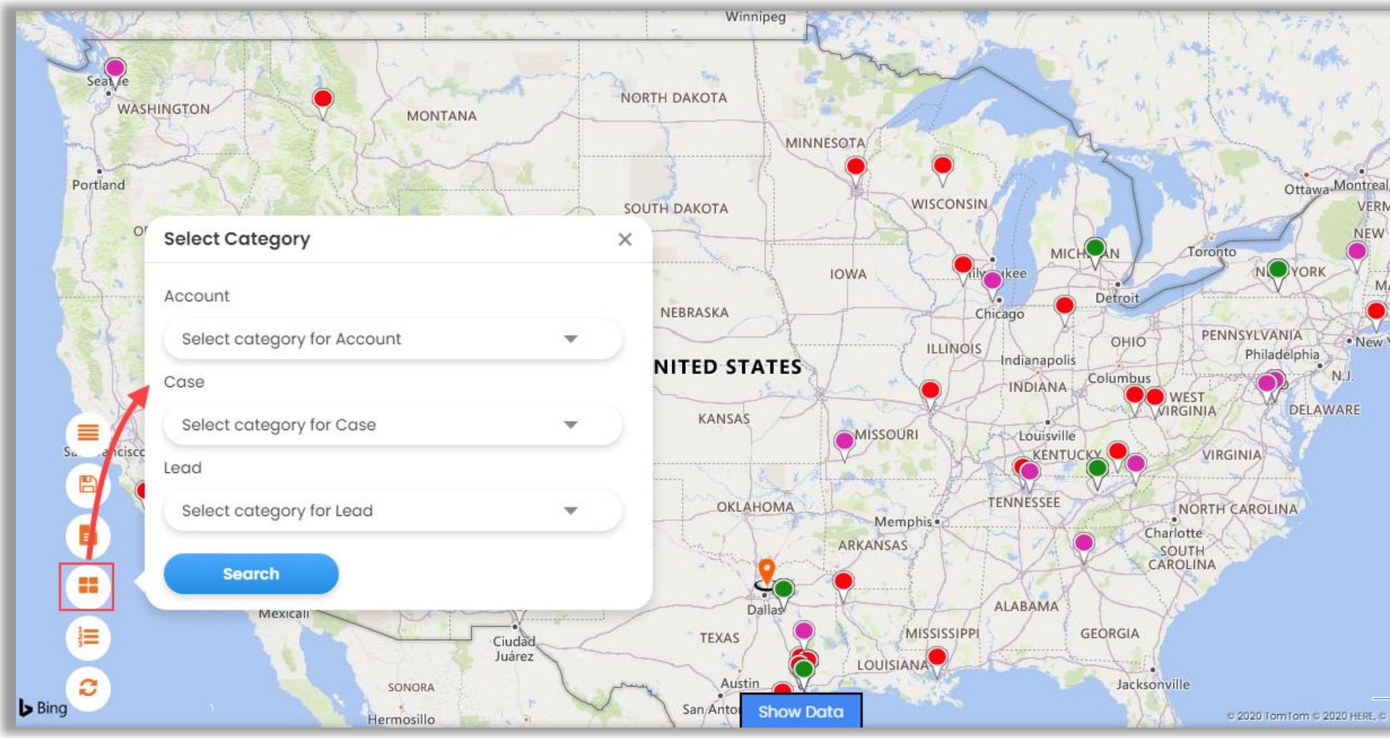
- You can get the "Marketing List" by clicking on Search icon if it has already been created in Marketing -> Marketing List or you can add to a new list by selecting the "Add to a new list".



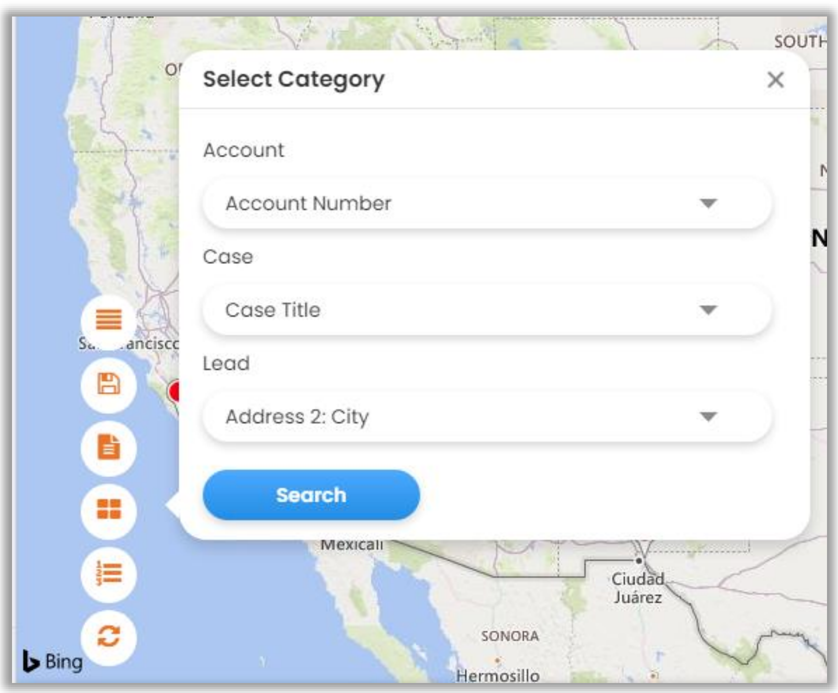
Note: At a time only the single entity records can be assigned to the Marketing List.

Category Search

- You can perform Category Search on single as well as multiple entities.
- Performing this search will list out all attributes of the selected entity. These attributes visible in the category listing dropdown can be managed under the **Entity Configurations** section.

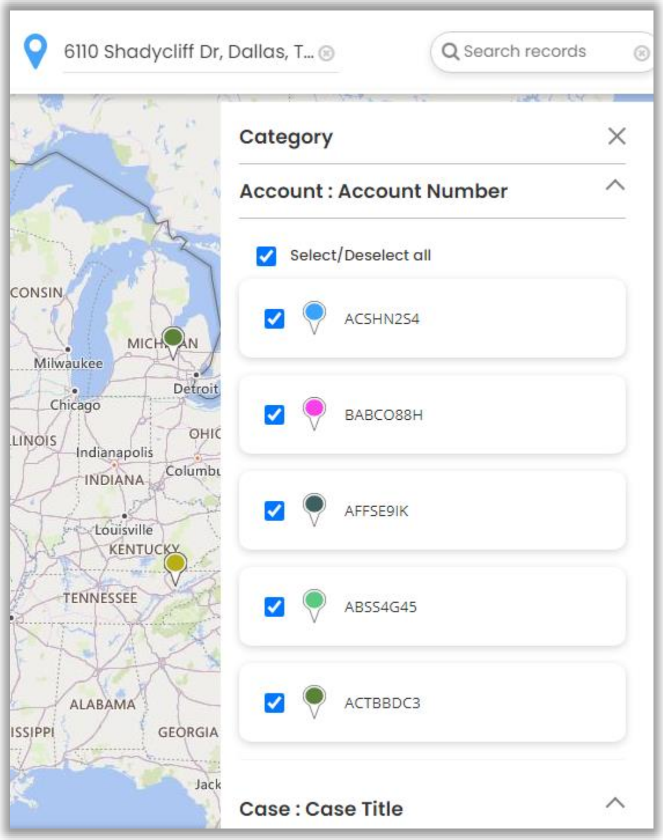


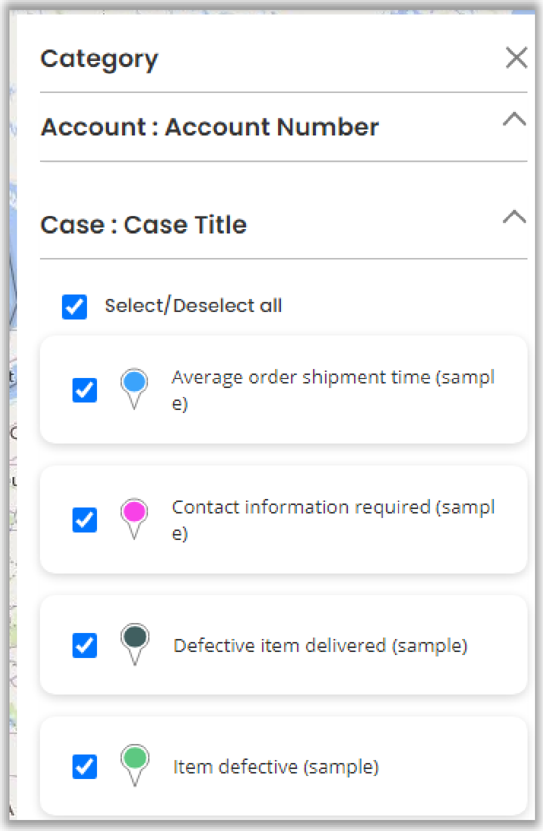
- Next, you need to select attribute based on which record should be plotted. Here, it would show dialog box for attribute selection for each entity.



- Clicking on **'Search'** button, the data will plot pins as per selection of attributes.

- You will get the list of selected Category entity wise on the right side of the map.

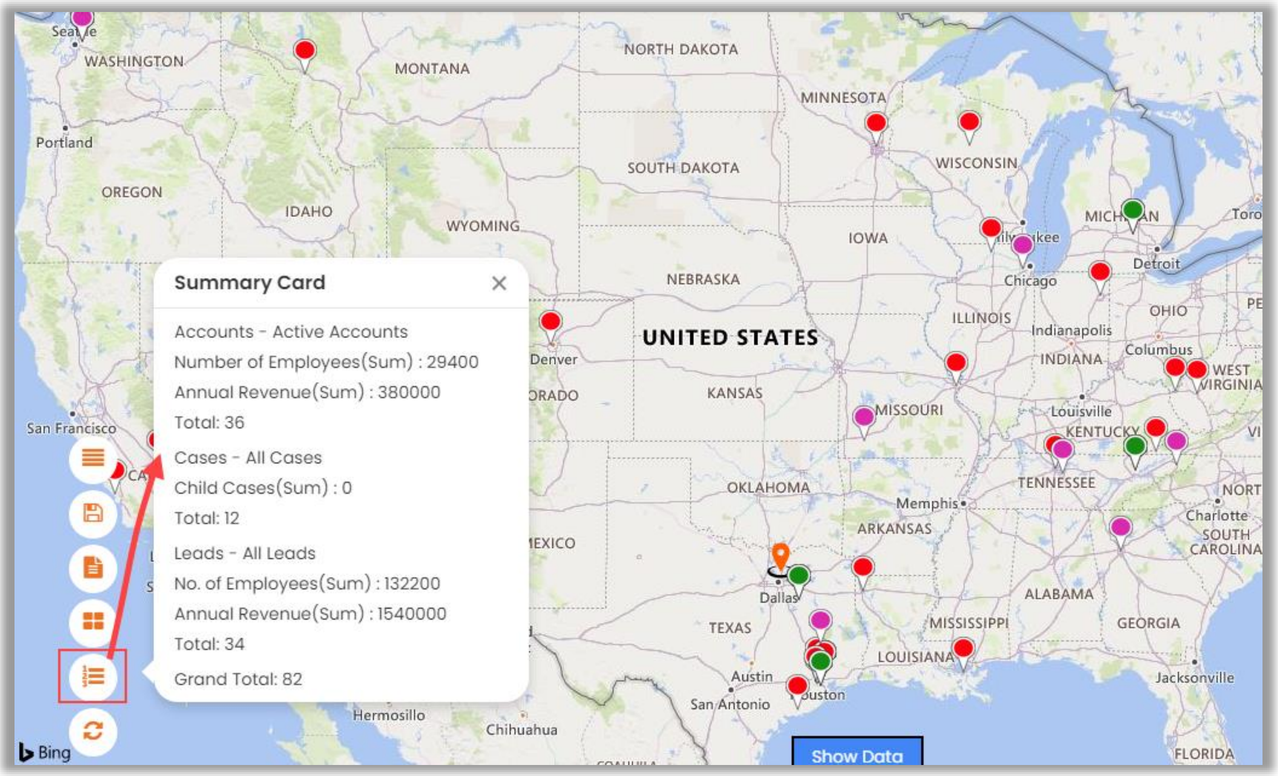




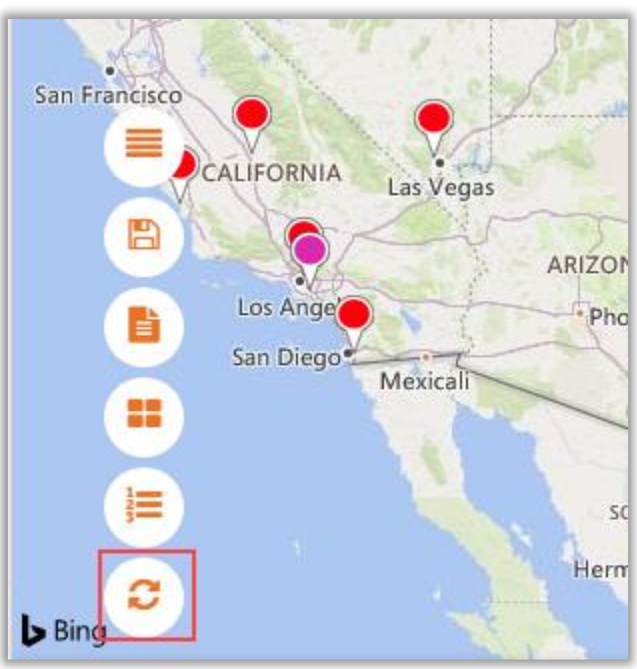
- The 'Category' section will be enabled which can be used to view category and from there select/unselect records based on requirement.

Summary Card

- Clicking on **‘Open Summary Card’** icon, you can view total number of records and other entity related details plotted on map as configured from the back end.



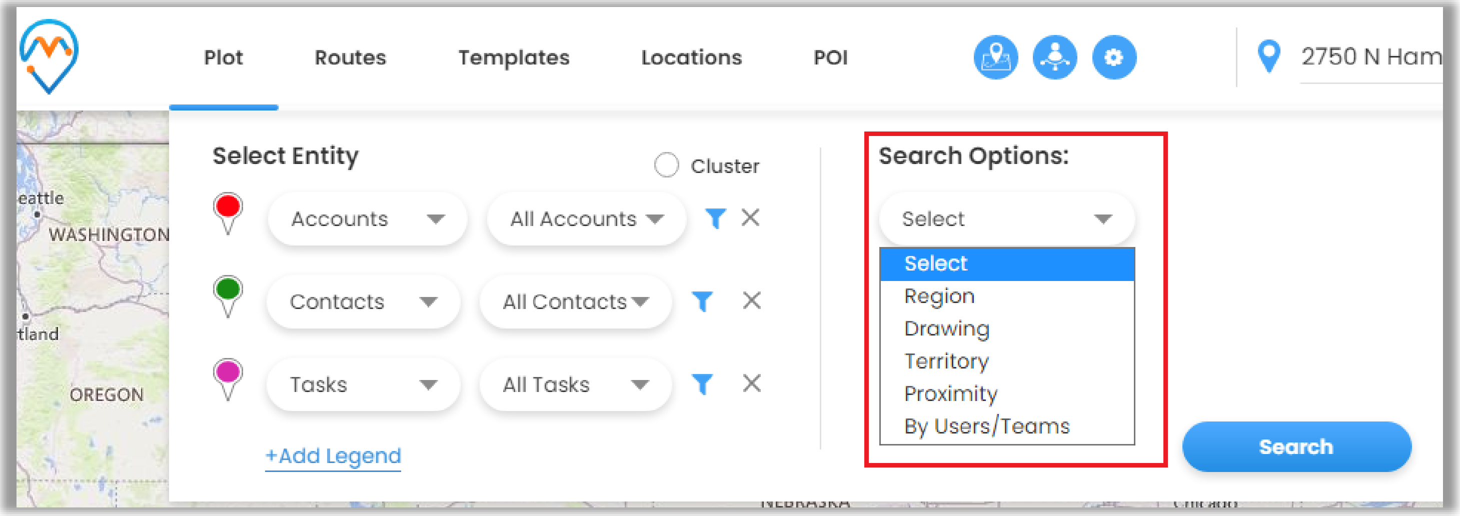
Refresh



- By clicking on the Refresh icon, the MappyField map and plotted records will refresh and load again.

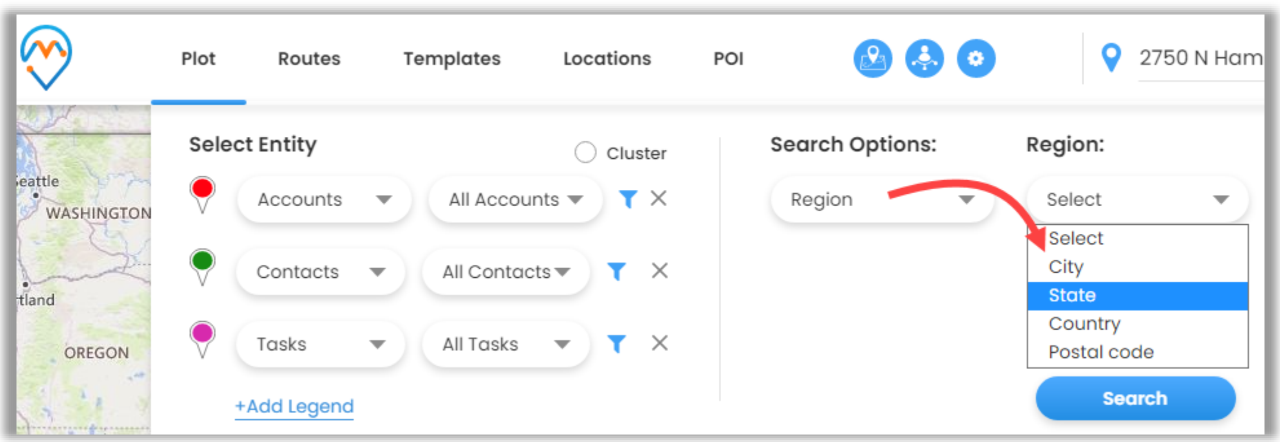
Search Options

- You can plot the records of particular entity based on different **Search Options**.
- You can search and plot the records based on **five** Search Options:
  → Region → Drawing → Territory → Proximity → By User

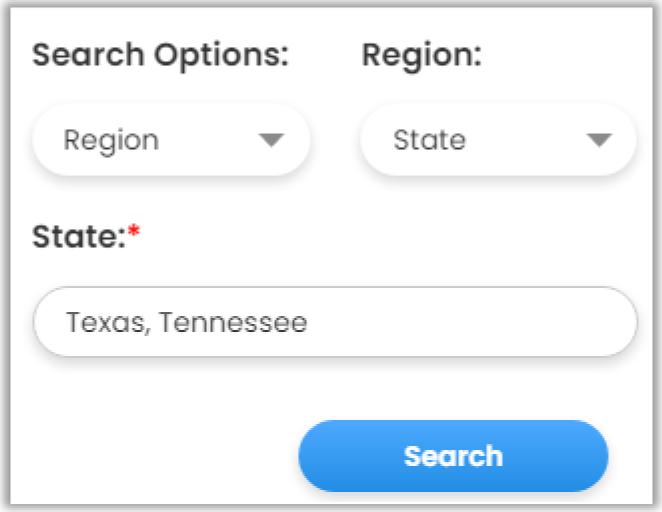


By Region

- By region option lets you plot records on the map based on the region of your choice.
- The various regions that you can select one from are **City**, **State**, **Country**, and **Postal Code**.

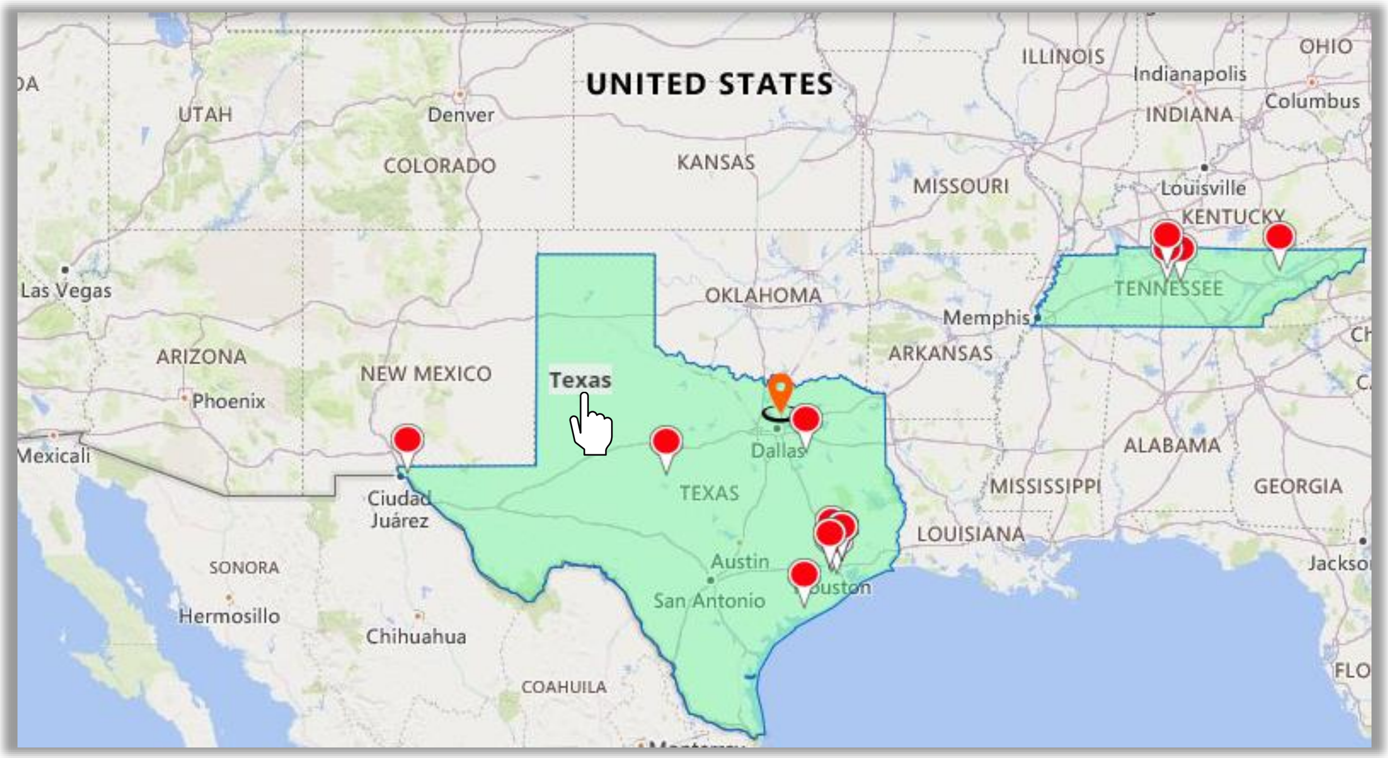


- If you select the State, you need to insert the 'State' name for that you need to check the records on the map.



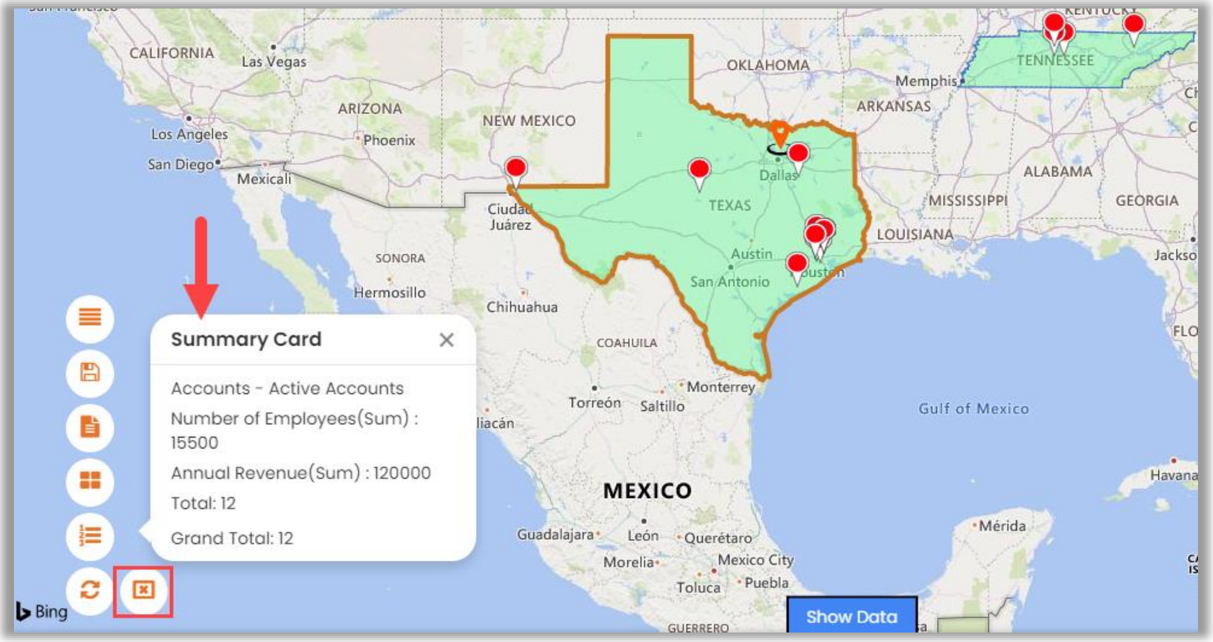
- User can also plot multiple regions in map by adding comma (,) separated values. For example: Texas, Tennessee.

- Now, by clicking on the **Search** button, only the inserted states get highlighted on map along with the records that come under that states.

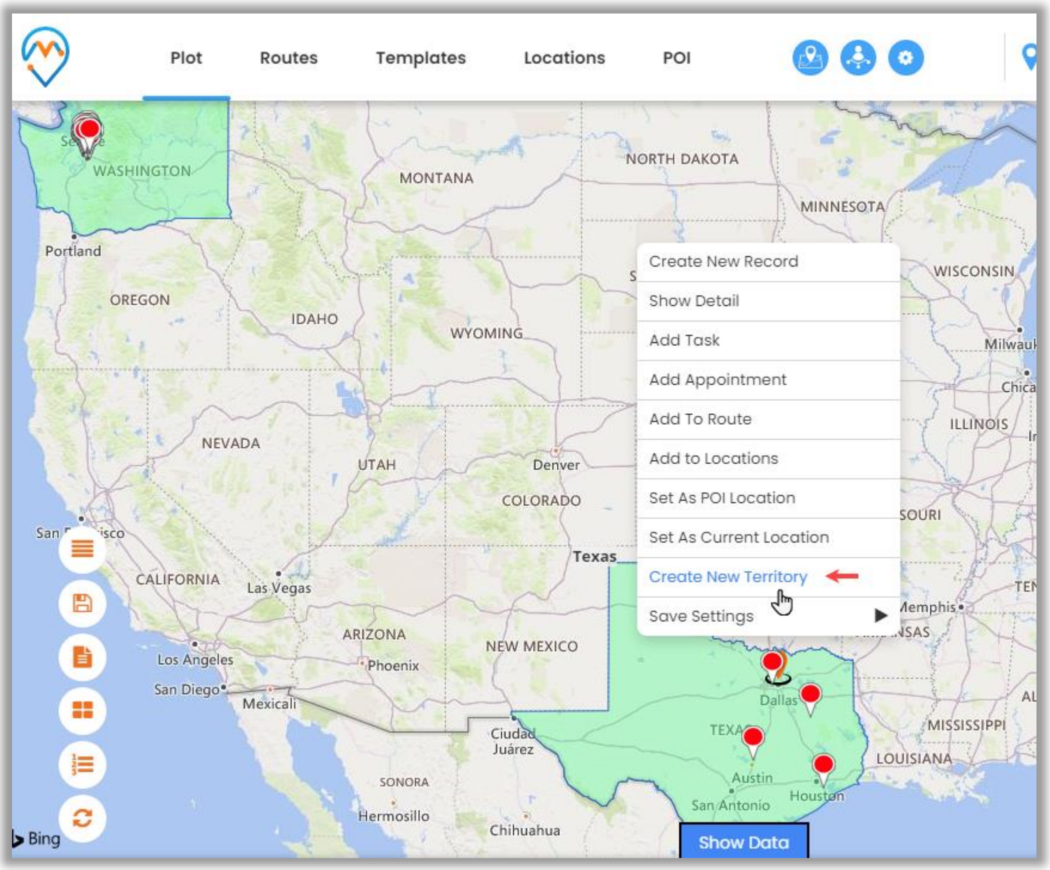


- By clicking on any shape, it will display **Summary Card** for selected shape.

- You can see details in the Summary Card of the selected State.

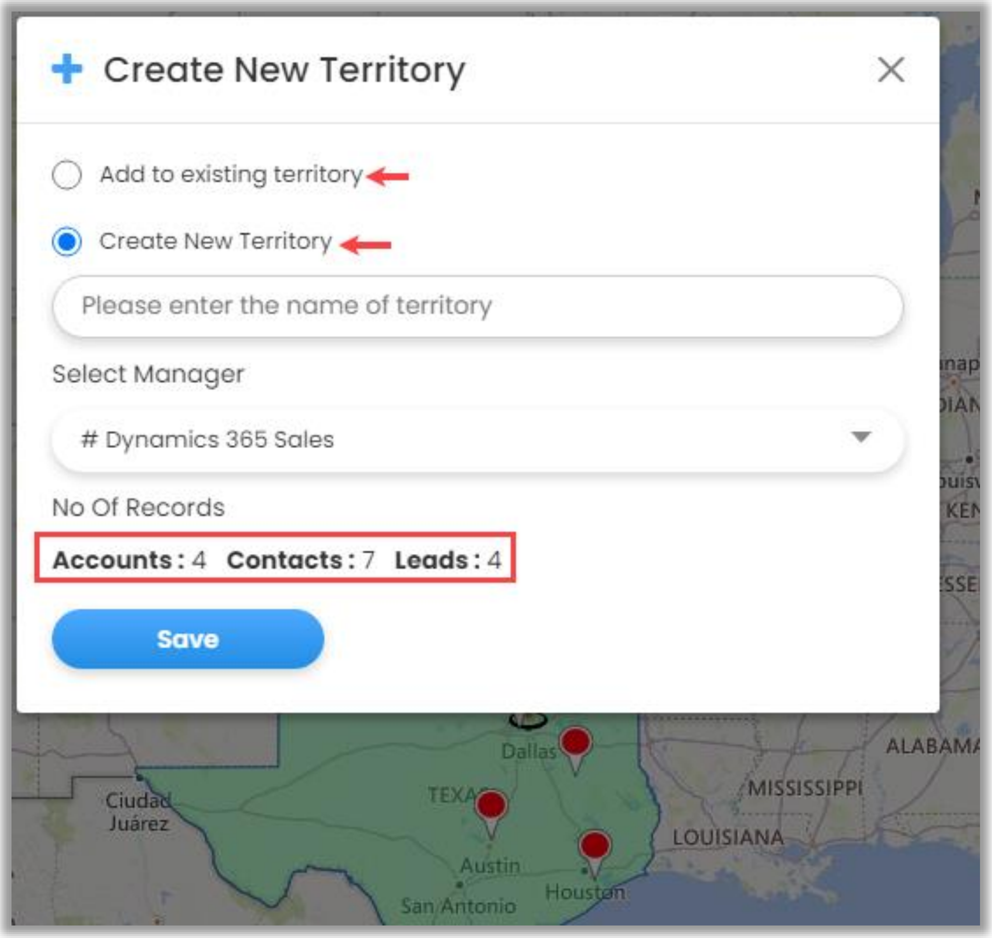


- By clicking on the close **X** icon, the state will deselect.
- You can also manage the Territory when the **Region** search option is selected and records are plotted on the map.



- By right-clicking on the Region (plotted location/area), you will get the option to for the Territory to create or manage.

- You will get the “Create New Territory” popup from where you can add the selected region to existing territory, or you can create a new Territory.

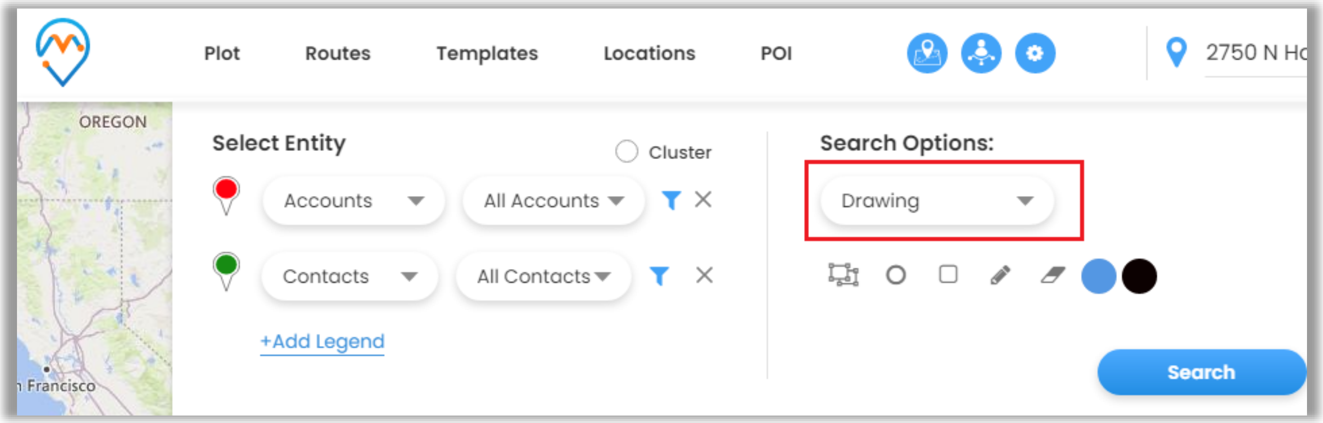


- You will get some analytics that how many records of Accounts, Contacts & Leads on that region. After selecting any option, click on the Save button to add the selected region into the Territory.

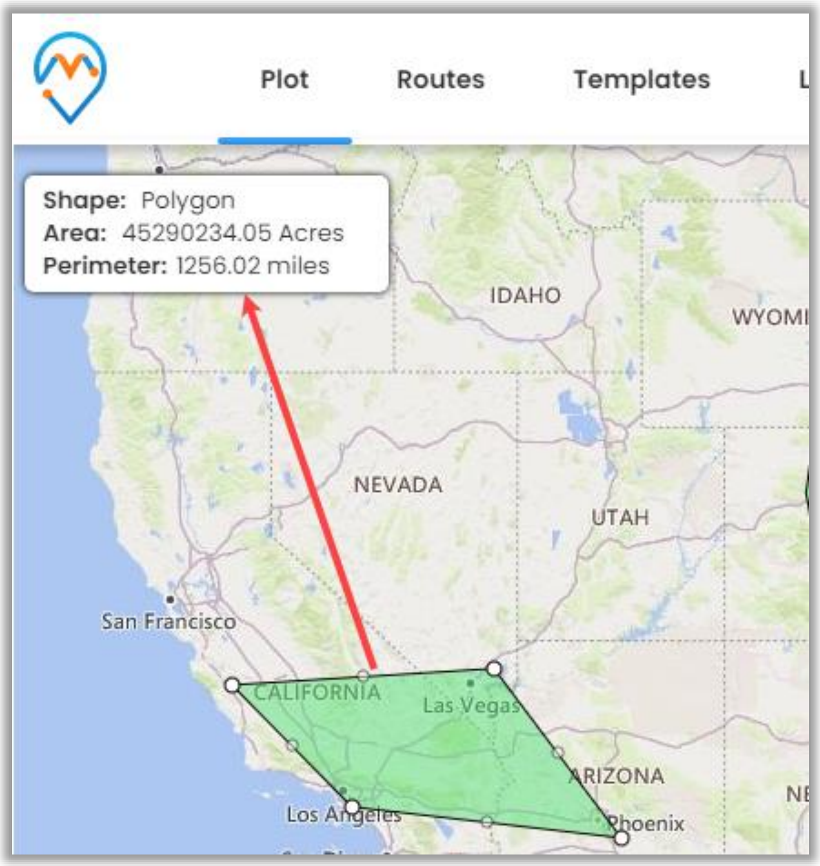
Note: You can create and manage the Territory from the individual option of the “Territory Management”.

By Drawing

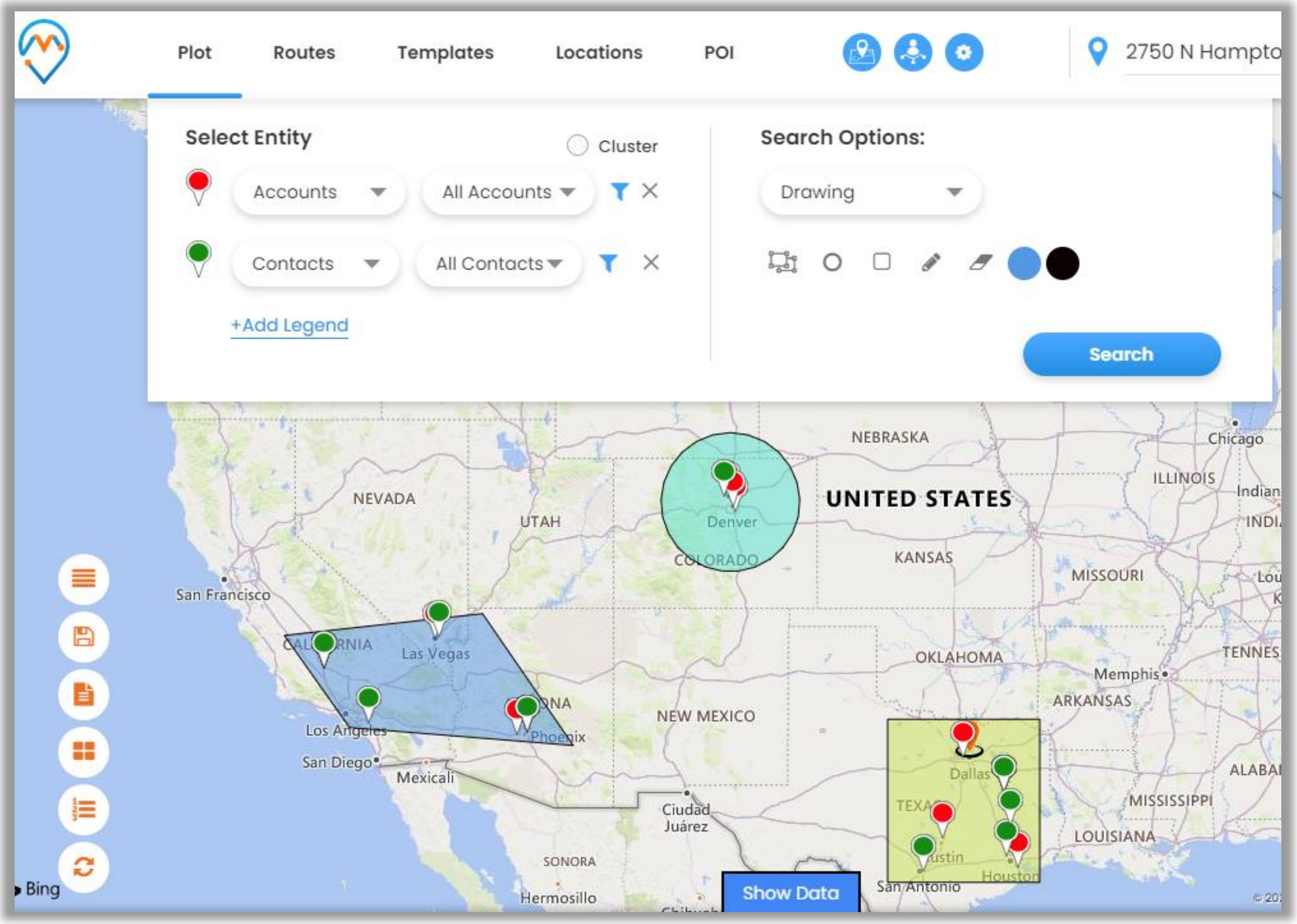
- You can plot the data by defining your own shapes. By selecting the Drawing search option, the drawing tool will enable you to draw the following shapes: Polygon, Circle and Square.



- For free drawing select the ‘Polygon’ shape, just by single clicking on the map drag the mouse cursor the shape will be drawn. You will get the records as per your drawing on the map.

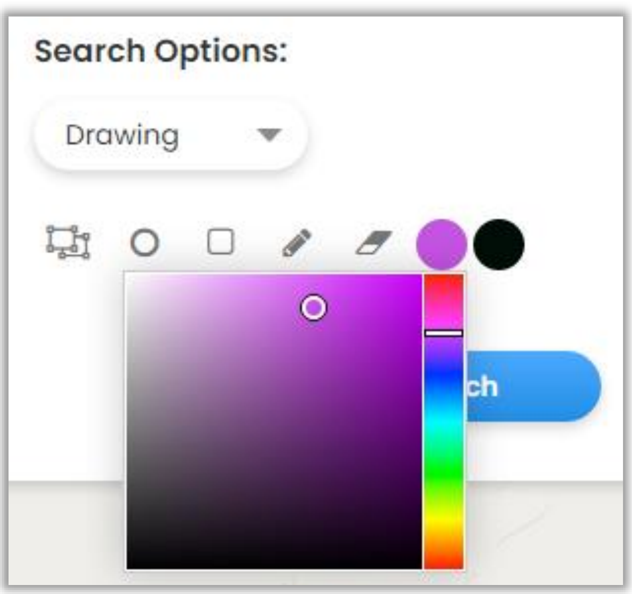


- When you draw the shape, you will get the real-time shape measure details as well.

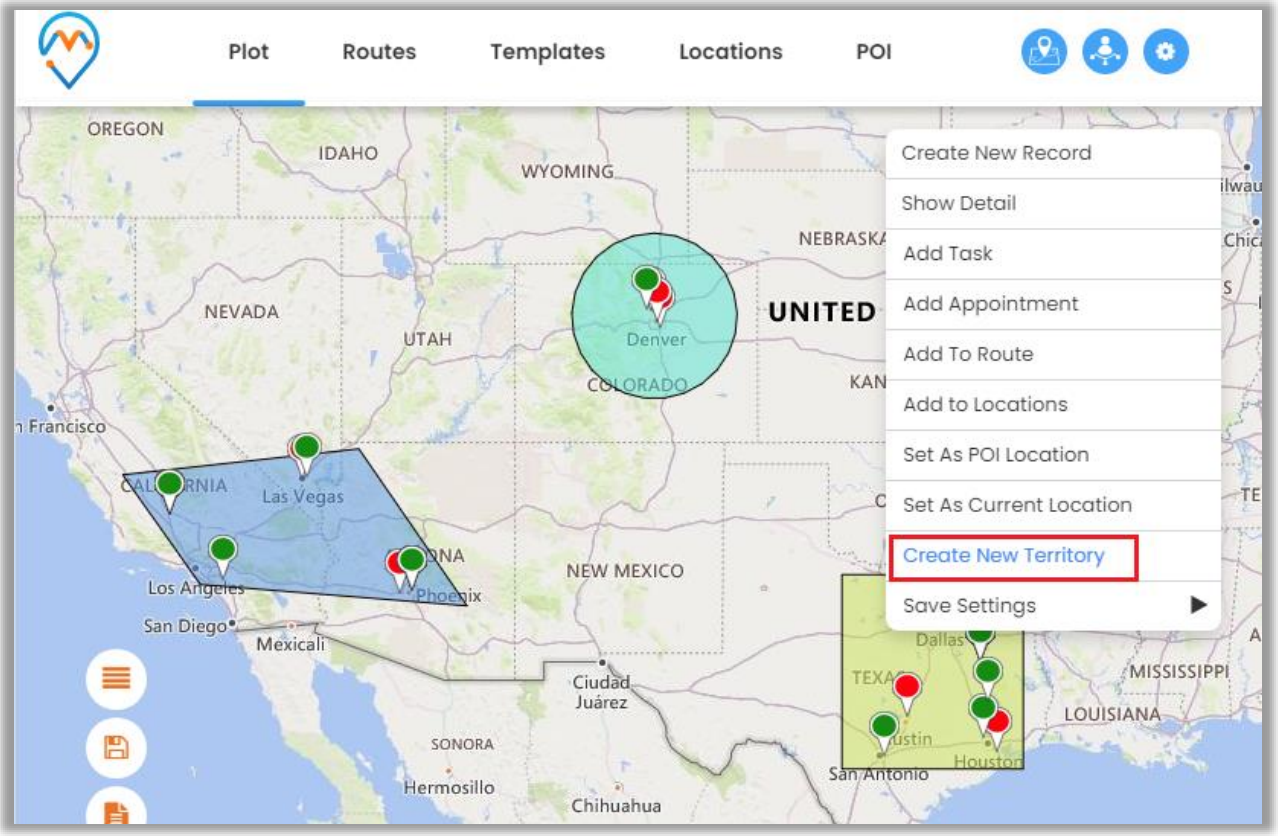


- You can edit the drawn shape by selecting 'Edit' icon. After selecting Edit icon, you can move the shape and increase/decrease the area of the shape.
- You can remove the drawn shape by selecting ''Erase" icon and then click on the shape.

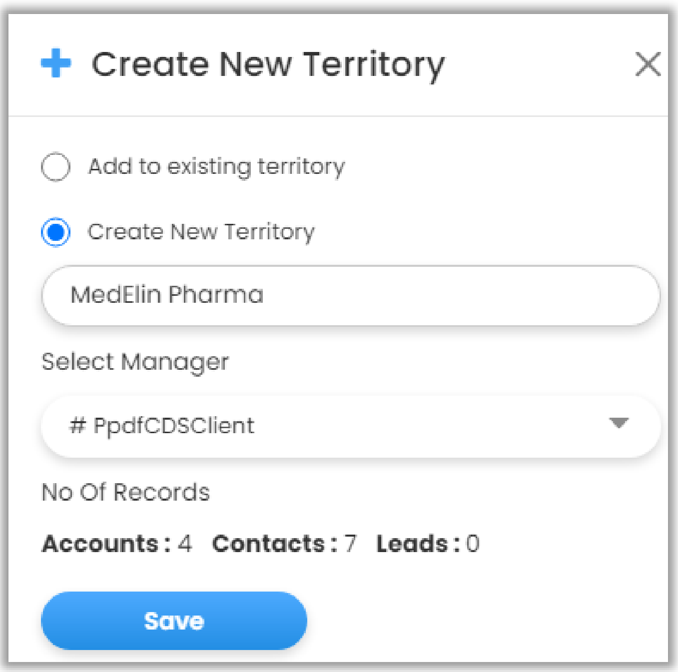
- You can change the fill color and the outline color of the shape.
- The color picker option is given to change the color of both.



- You can also manage the Territory when the **Drawing** search option is selected, and records are plotted on the map.



- By right-clicking on the Region (plotted location/area), you will get the option to for the Territory to create or manage.
- You will get the "Create New Territory" popup from where you can add the selected region to existing territory, or you can create a new Territory.

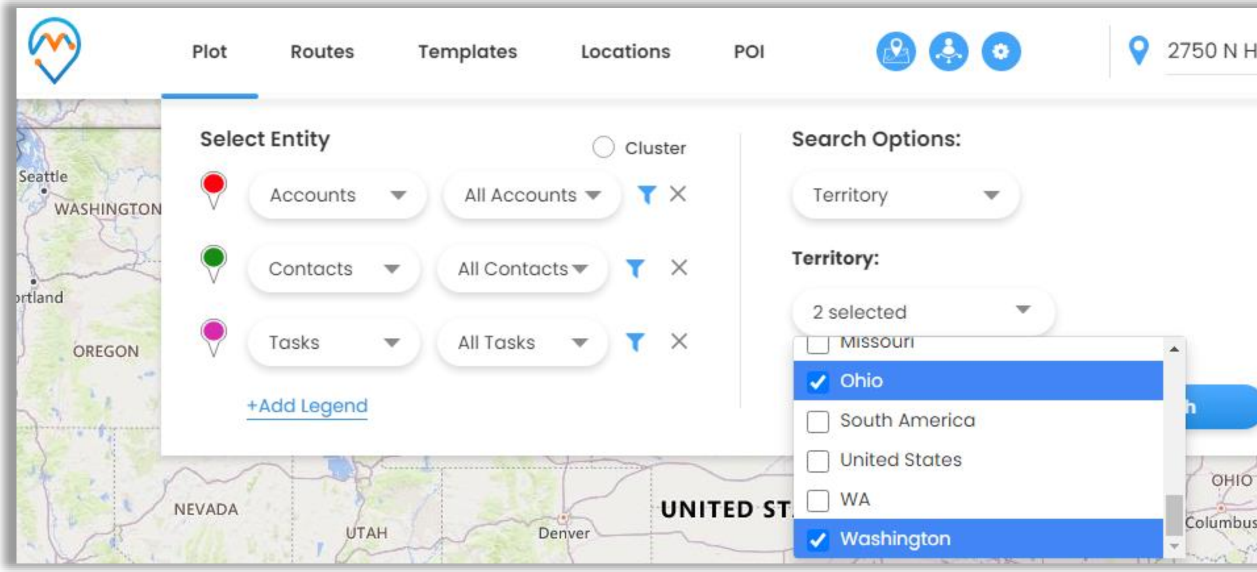


- You will get some analytics that how many records of Accounts, Contacts & Leads on that region. After selecting any option, click on the Save button to add the selected region into the Territory.

Note: You can create and manage the Territory from the individual option of the "Territory Management".

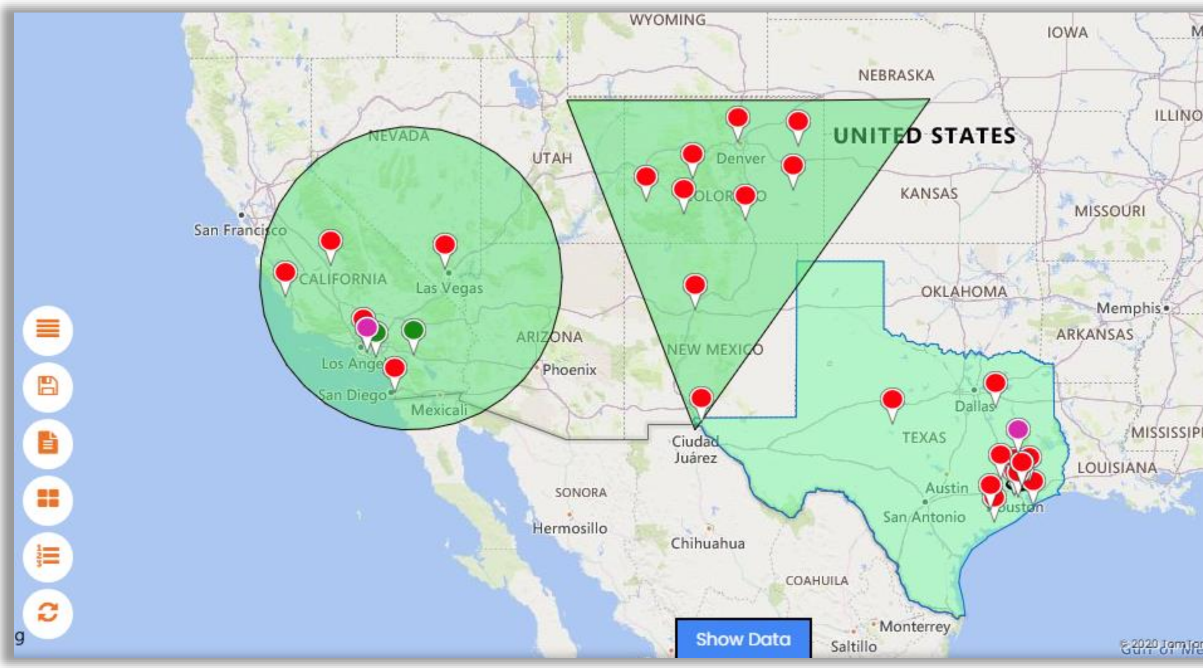
By Territory

- You can also view records on maps based on **Territory**. By selecting the 'Territory' in search option , you will get the list of Territories in dropdown.



- Select the Territory/Territories the records of which you want to display on the map.
- Now, on clicking **Search** button, all records that fall under the selected territory will be plotted on map.

Note: This dropdown would show those territories also that are created from created under **Territory Management** section *or* from Settings -> Sales Territory -> Business Management.

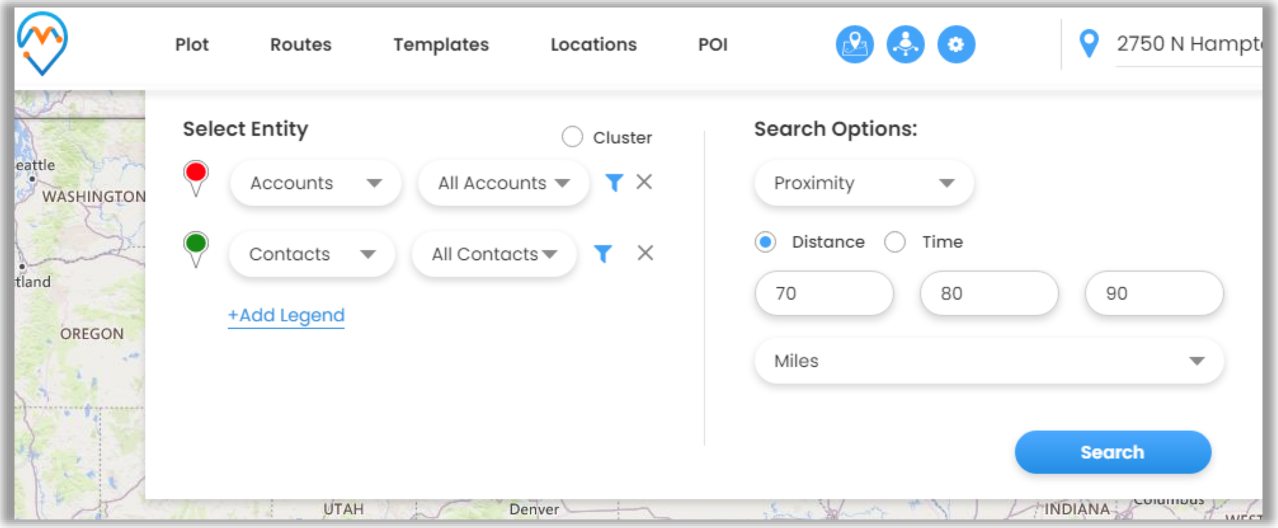


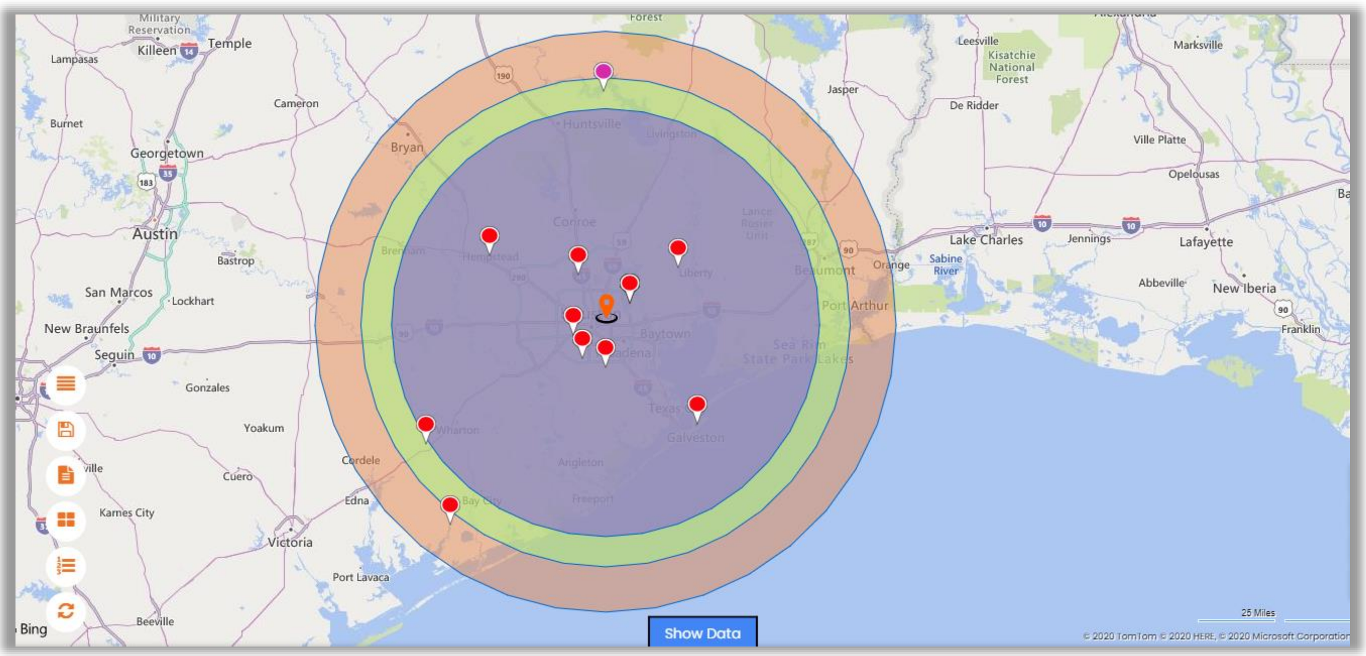
Note: To select territory, territories should be defined by you along with their territory manager in CRM.

- To manage territories, follow these steps: **Settings** > **Business Management** > **Sales Territories**.
- Also, territories reflect based on territories created under territory management section.

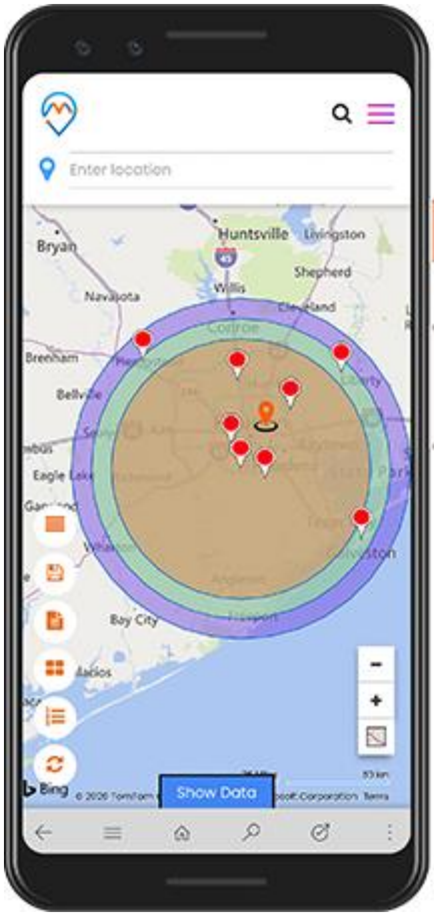
By Proximity

- It lets you view nearby records in proximity from current location based on Distance or Time.
- You can define distance either in miles or kilometers as well as time in minutes.



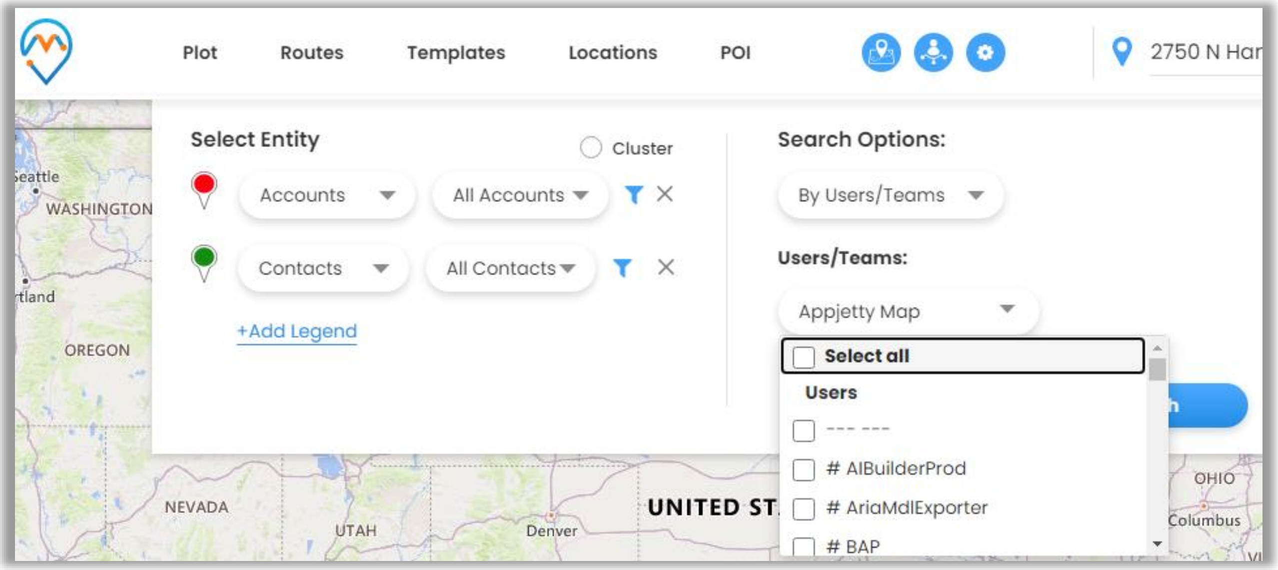


- DynamicsCRM user can also search the records using the 'Proximity Search' from the mobile or tab.



By User/ Team

- You can search and plot the entity records based on **Users** and/or **Teams** from the 'Search Options'. It would plot all records that are created by the individual User or the Team.

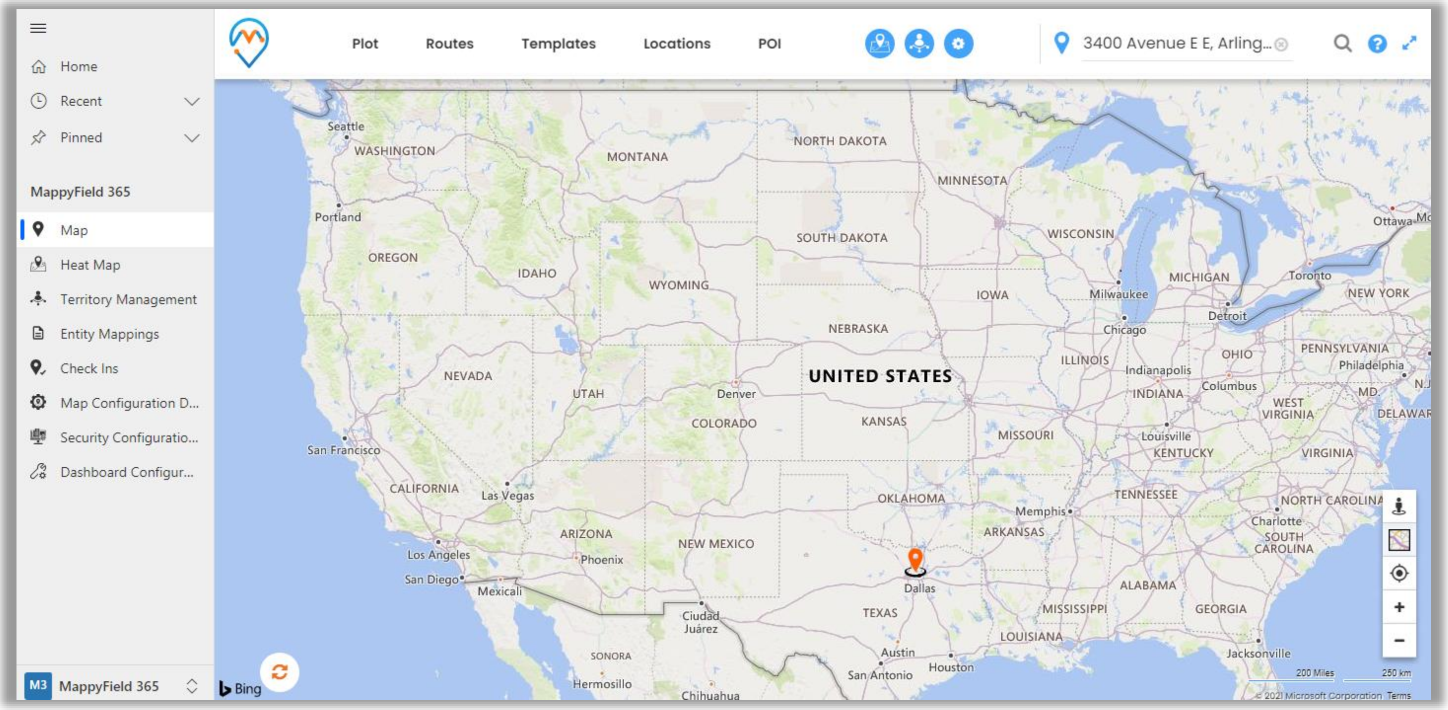


- By clicking on **Search** button, the records of the selected user will be plotted on the map.

Note: This search option is available only to users who has admin role.

Map View options

- There are many options and actions provided to manage the map records easily from the Map View.

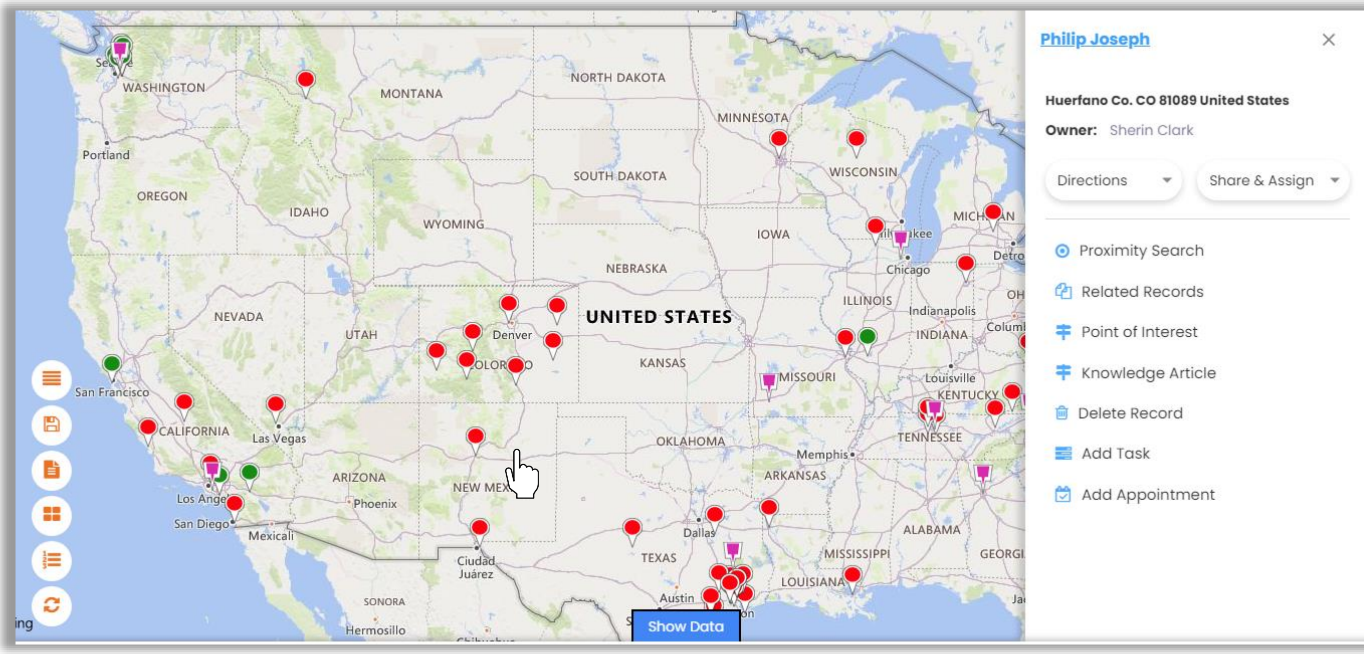


Details on Hover

- You can view record name by hovering on any pushpin. Information shown on hover is completely customizable from the Entity Mapping.

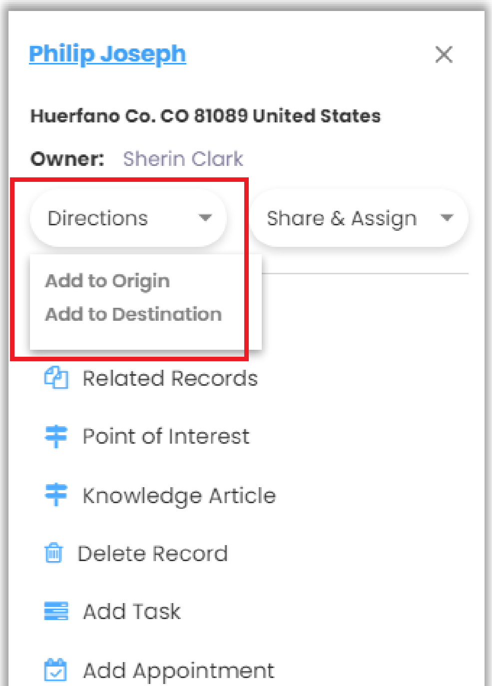
Tooltip Details

- By clicking on any specific record (pin), you will get details related to that record based on configured from the backend. By clicking on that, the details of the Slider will open from the right side.



- From the records detail card from the slider will let you perform different actions related to the selected record.

- For the selected record, you can set the direction by defining the Origin or Destination.

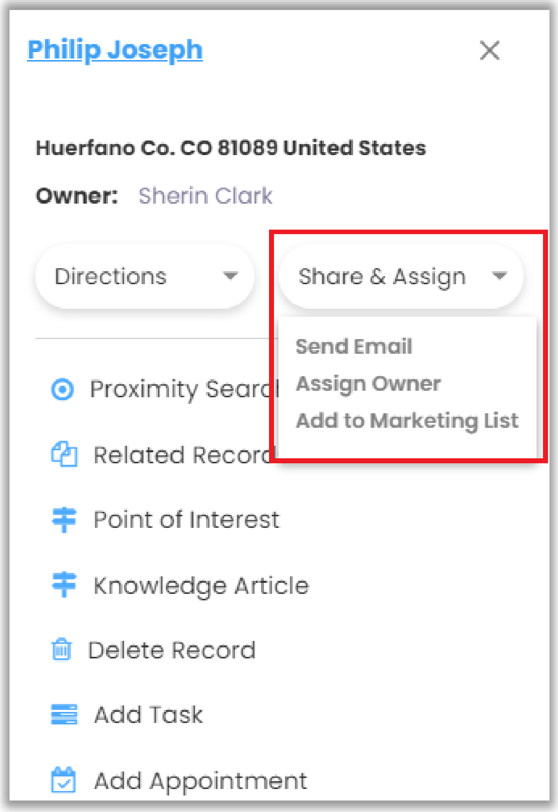


- You can **Share & Assign** the selected records by:

  > Sending Email

  > Assigning Owner

  > Add to Marketing List



Note: These action are present by default on record of every entity and these buttons cannot be changed.

- There are some **other actions** that can be enabled/disabled from the **Security Template** configuration.

- Other Actions:

  > Proximity Search

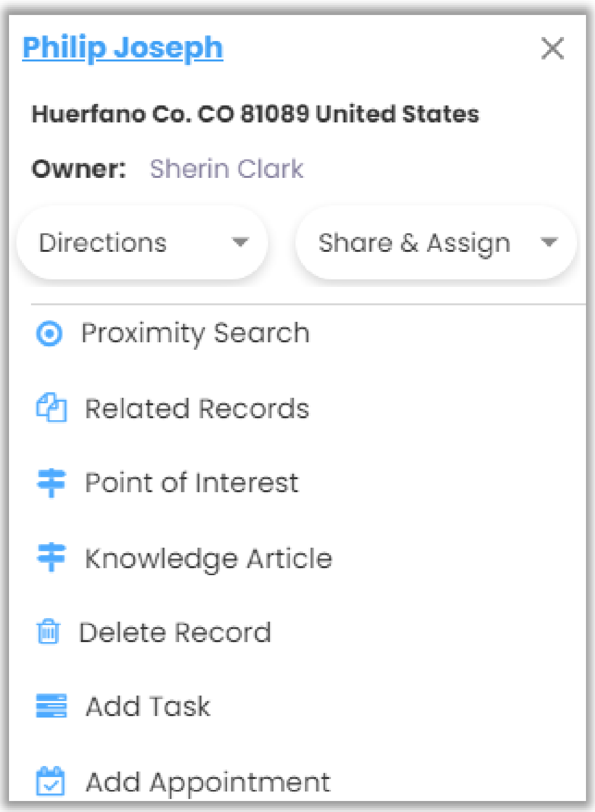
  > Related Records

  > Point of Interest

  > Delete Record

  > Add Task

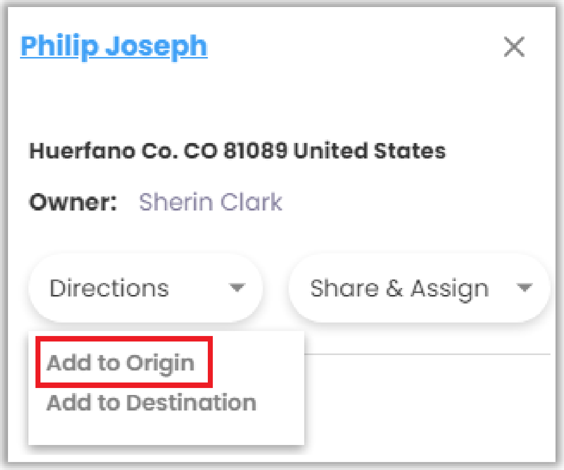
  > Add Appointment



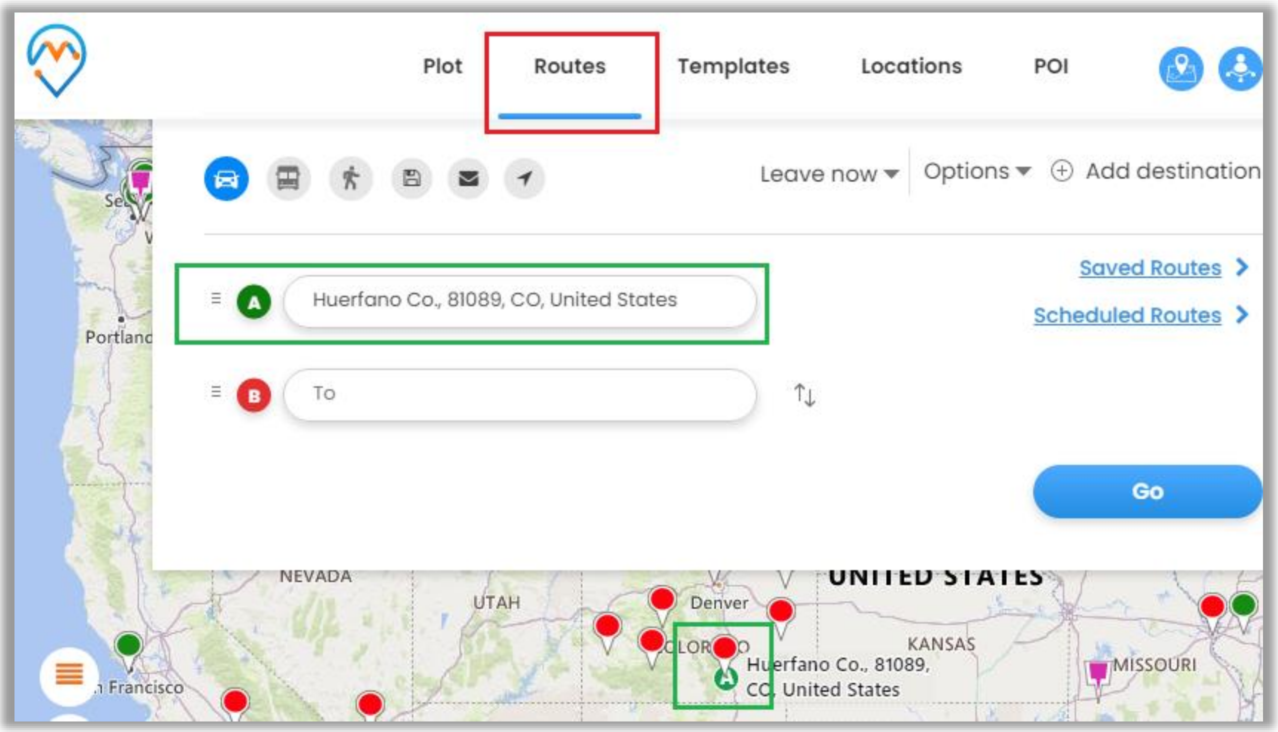
Note: Other than these, there are few actions buttons like **Add Task** and **Add Appointment** that are dependent on the selected entity.

Direction

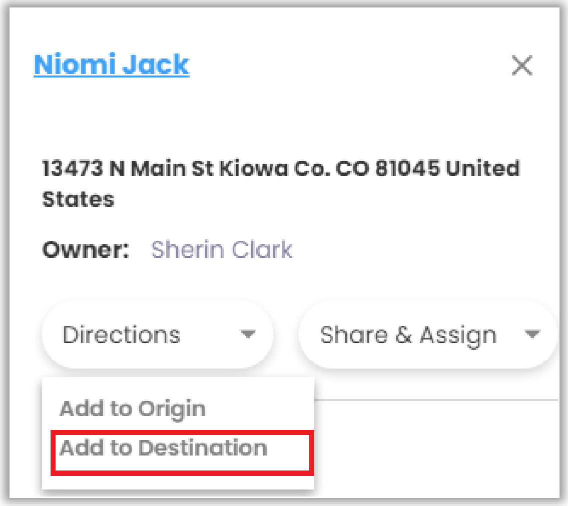
- By clicking on the **Directions → Add to Origin** option, address of that record will be added as starting point in **Routes**.
- From **Routes** tab you will get address of your customer's location.



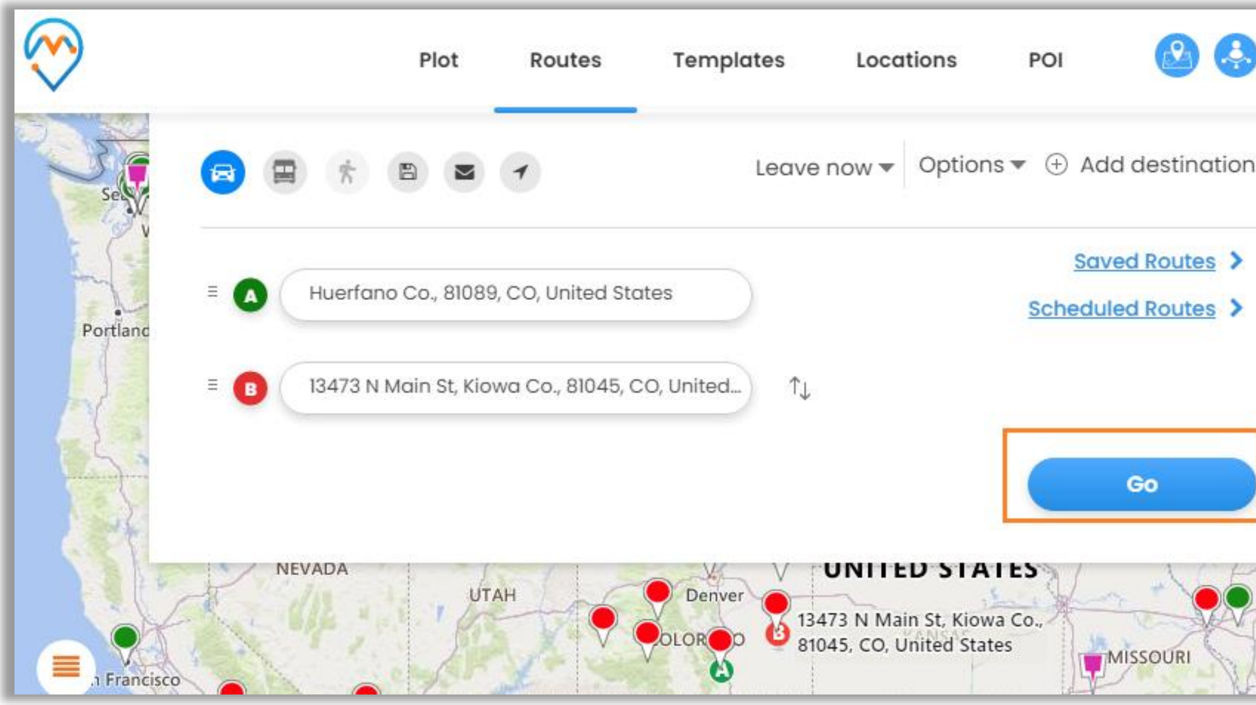
- On the map, the 'Starting Point' will be assigned as **A** with the address of that record displayed.



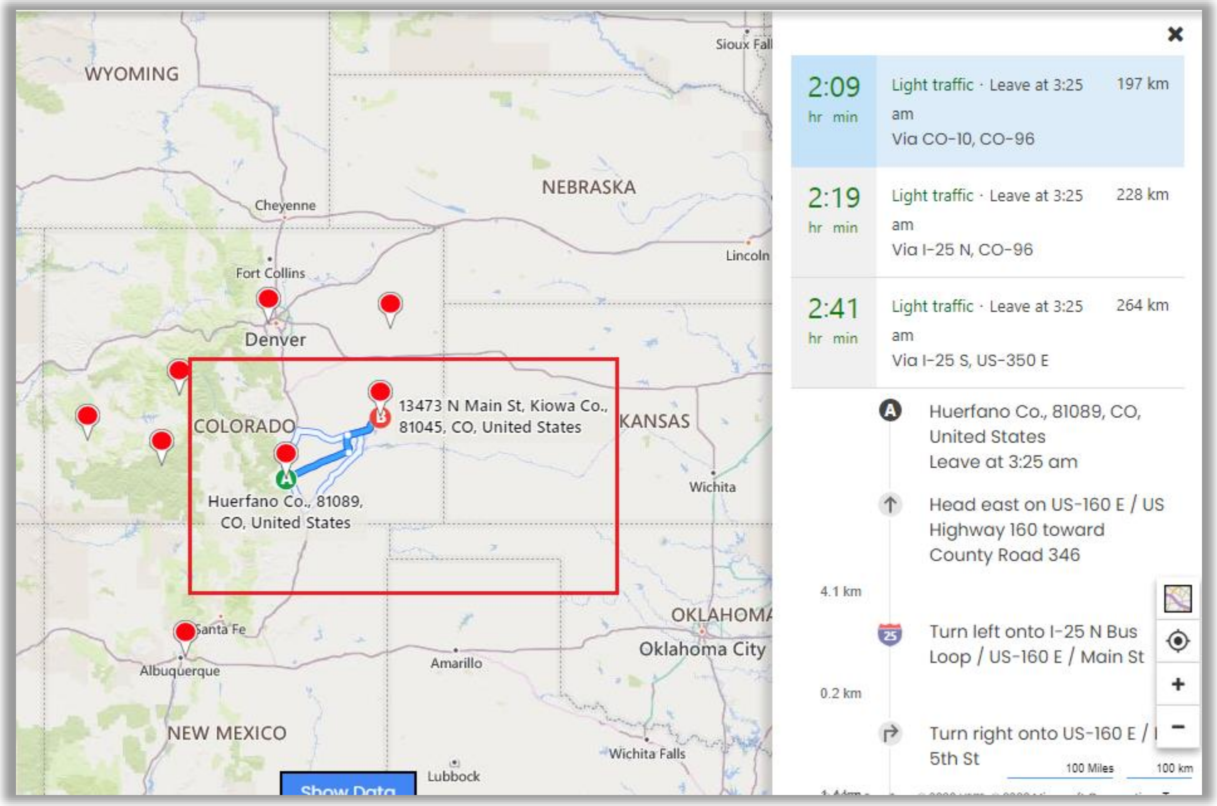
- By clicking on the **Add to Destination** option of the other records, the address of that record will be added as destination point of route under **Directions** tab.



- You can select the **Origin** and the **Destination** between the plotted records from the **Directions** option and manage your route based on that direction.

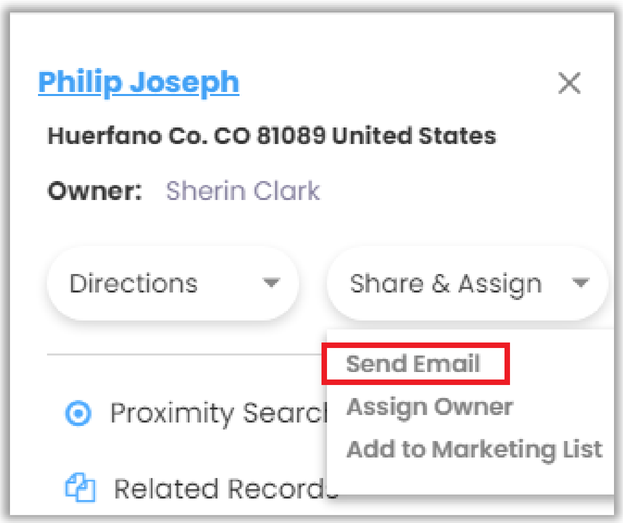


- Click on the **GO** button to check the routes between selected **Origin** and **Destination** on the Map.

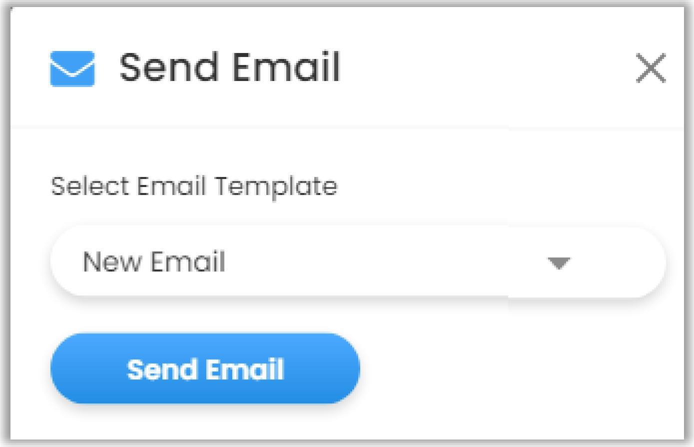


Send Email using Template

- From the Share & Assign, you can 'Send Email' to the selected record.
- By clicking on that action button, it would prompt user to select an email template.



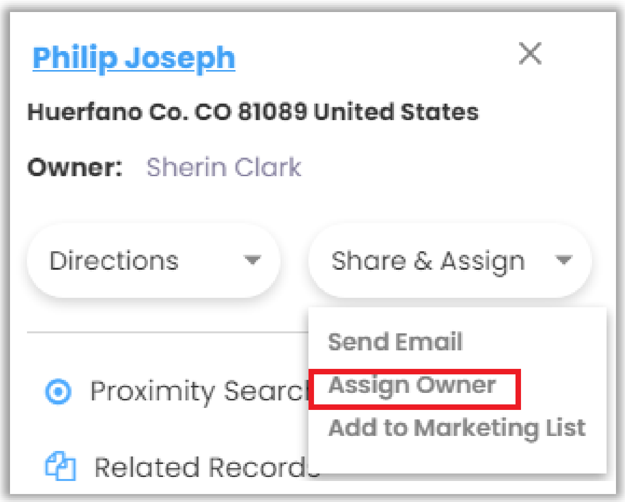
- The email templates list would have list of all the templates that are created within the CRM and custom templates as well. You may select from the list or select New email to create a new one. Selecting template would directly perform the mail action if email id is available. While creating a new one would redirect to CRM email screen.



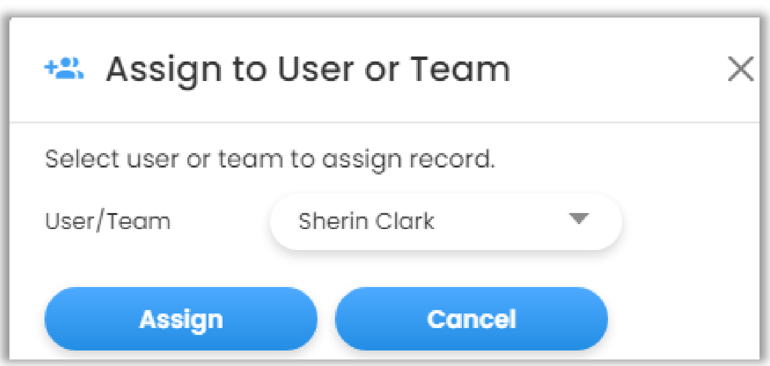
Note: If user to whom the mail is being sent is not operating the email address, then the mail won't be sent and an error message stating that record's email address is not active will be displayed.

Assign Owner

- From the 'Share & Assign', you can **Assign Owner** for the selected record.
- You can assign any record to specific user or team by clicking on "Assign Owner" option from specific user's details.



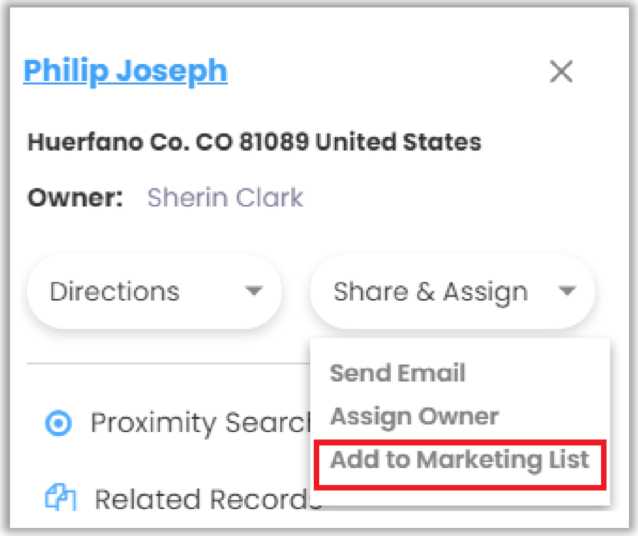
- Selecting Assign Owner option, it opens a dialog box where dropdown list of all the CRM users is provided to select user or team as required. After selecting the appropriate User/Team, click on **Assign** button.



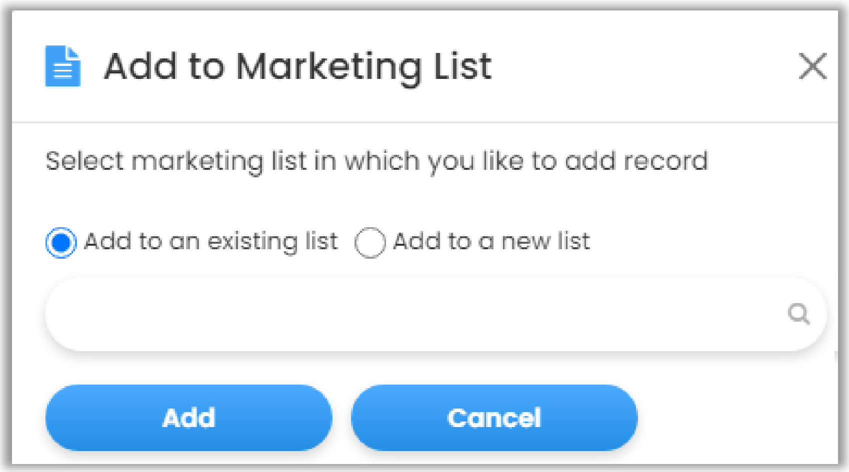
Note: When assigning record to a user or team, that specific user or team should have role assigned to it or else record won't be assigned.

Assign to Marketing List

- From the 'Share & Assign', you can **Assign Owner** for the selected record.
- You can assign any record to specific user or team by clicking on "Assign Owner" option from specific user's details.



- On clicking, you will have the option to add record either in existing marketing list or create the new one.

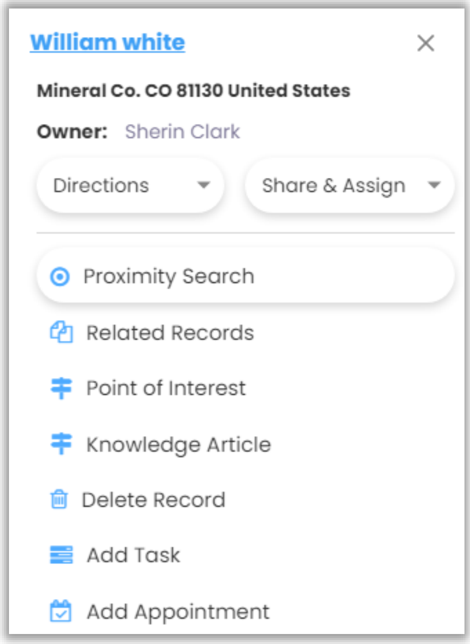


- After selecting the marketing list, click on the Add button to complete the addition of records to the marketing list.

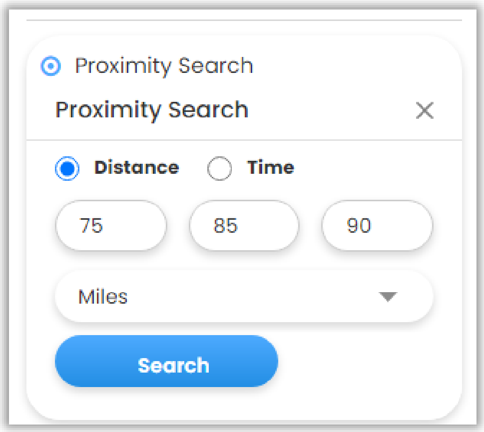
Note: Assign to marketing list icon under map section, will assign all records of particular entity to the list. Also, it will get assigned only when records of single entity are plotted on map.

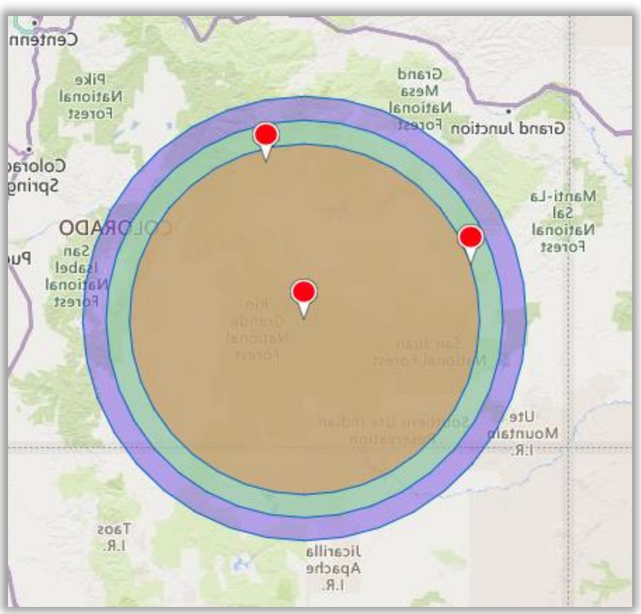
Proximity Search

- From the detail cared of the selected record, **Proximity Search** lets you to view nearby records in proximity of the selected record based on time or distance.



- You can define distance either in **miles** or **kilometers** as well as **time** in minutes.
- You can also perform concentric proximity search based on distance with three different values.
- Here on defining search criteria of 75, 85,95 Miles, it will plot records situated in 75, 85, 95 Miles area from current pin location.
- Also, you can search in proximity from single entry as well.



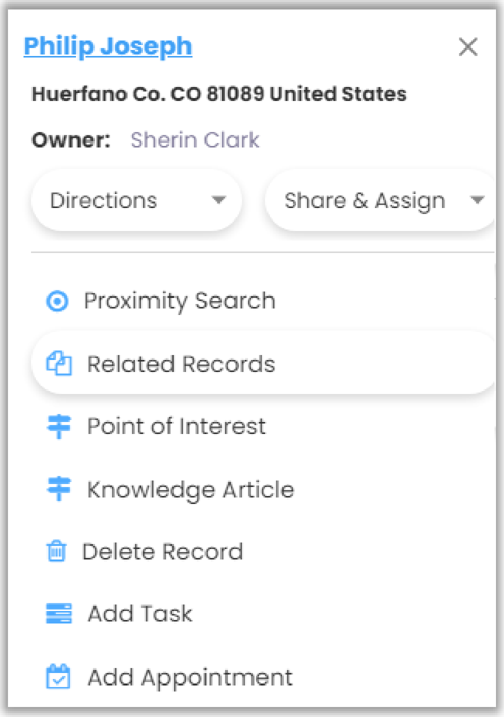


- On hovering over pin, you get details as configured along with travel distance in case of search based on distance. And travel time in case of search based on time.

Note: When proximity search is to be done on basis of time, at max you can define 85 minutes.

Related Records

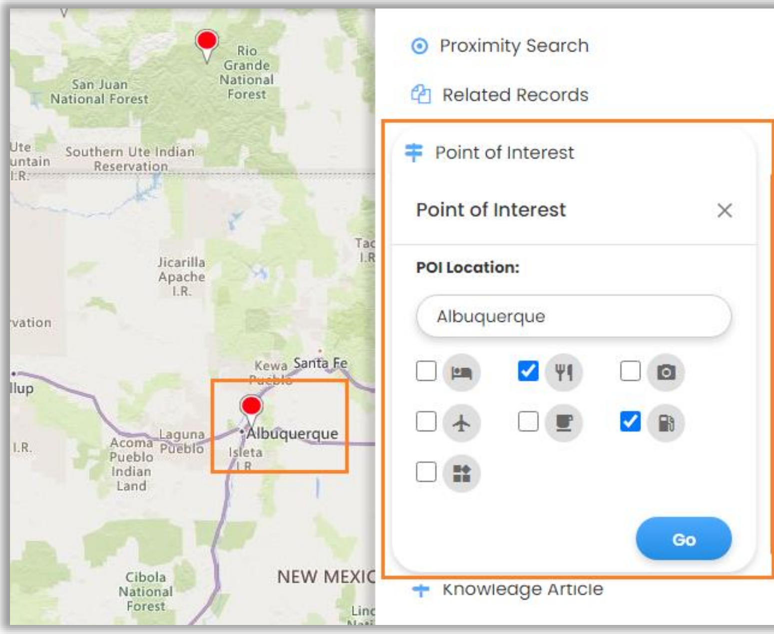
- By clicking on "**Related Records"** icon, all related records to the plotted record get plotted on map.



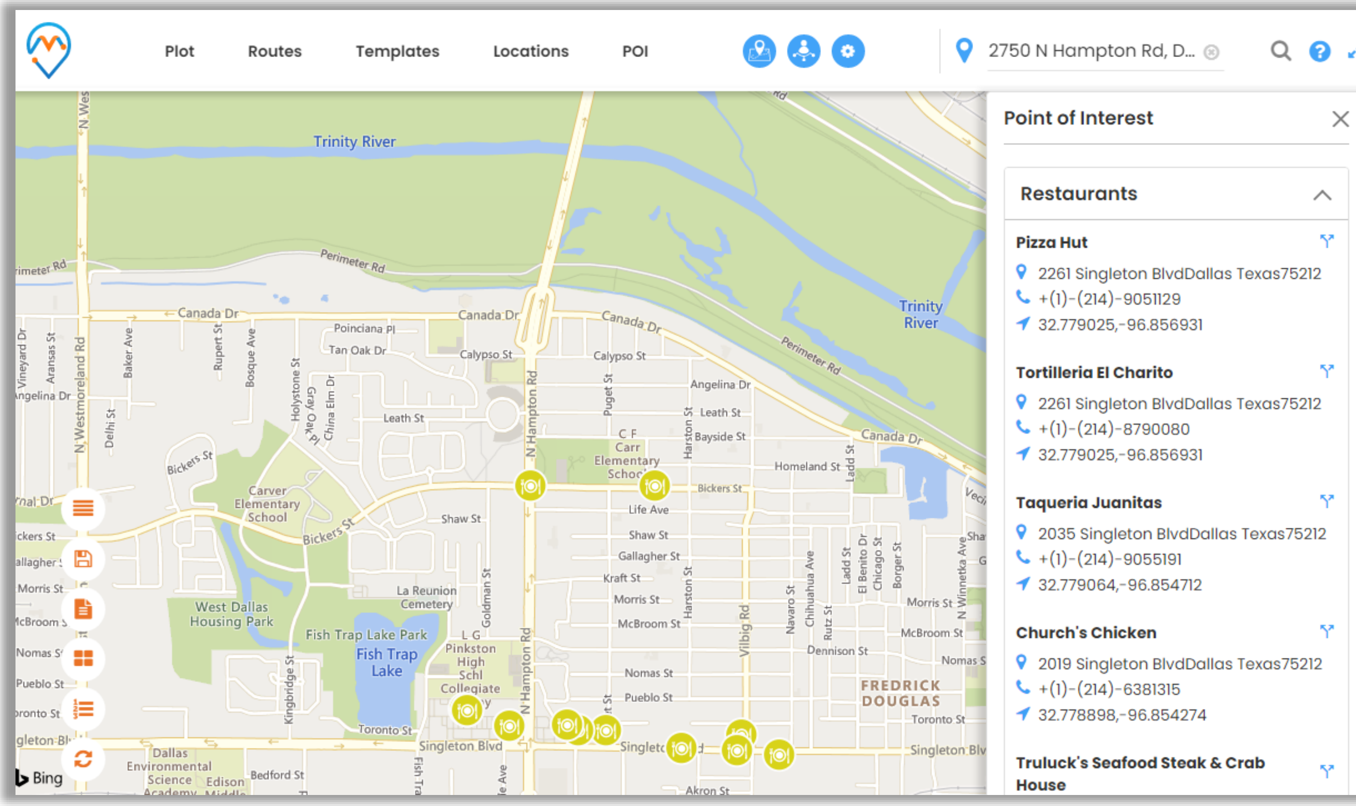
- Here, as there were three contacts associated with the account, all three of them will get plotted on the map.

Point of Interest

- You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. from the Point of Interest.
- It will take the address of the selected record as POI location to search nearby places.

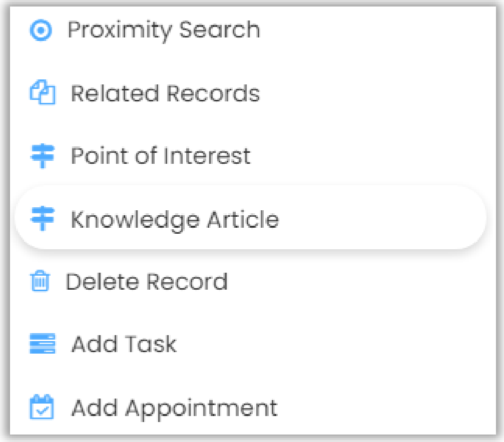


- After selecting the specific Point of Interest options, click on the **GO** Button. The selected POI options will plot on the map.

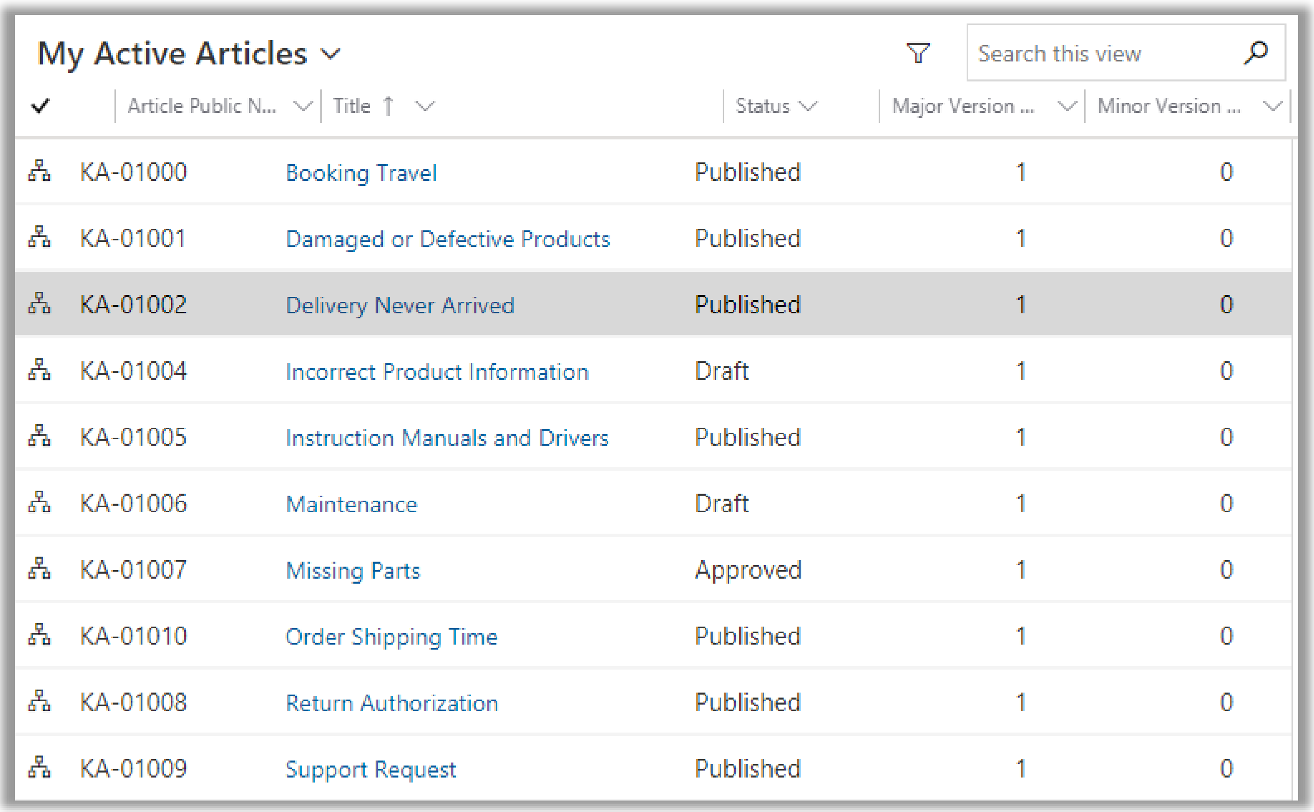


Knowledge Article

- You can check the Knowledge Article which is shared with the selected record.



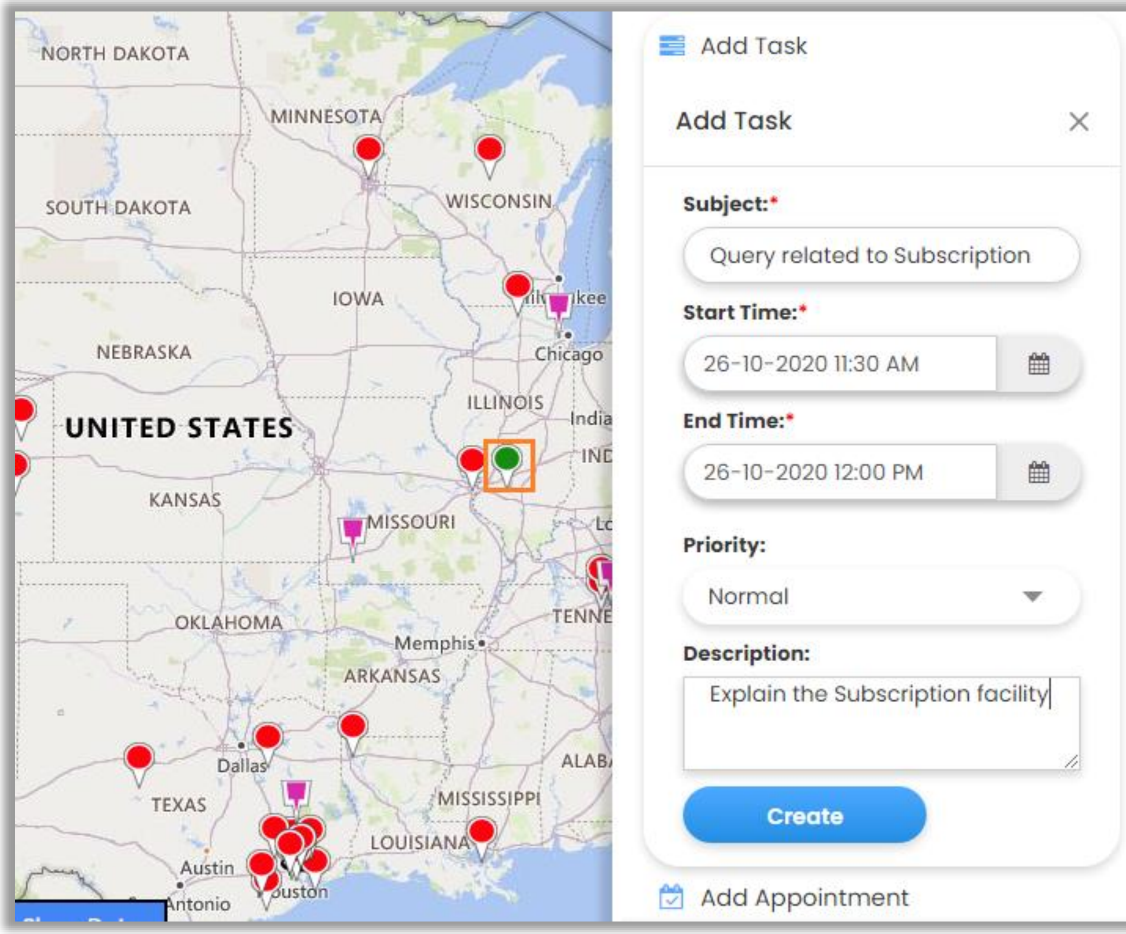
- By clicking on the **Knowledge Article**, you will navigate to the ‘Active Articles’ page.



Article Public N...	Title ↑	Status	Major Version ...	Minor Version ...
KA-01000	Booking Travel	Published	1	0
KA-01001	Damaged or Defective Products	Published	1	0
KA-01002	Delivery Never Arrived	Published	1	0
KA-01004	Incorrect Product Information	Draft	1	0
KA-01005	Instruction Manuals and Drivers	Published	1	0
KA-01006	Maintenance	Draft	1	0
KA-01007	Missing Parts	Approved	1	0
KA-01010	Order Shipping Time	Published	1	0
KA-01008	Return Authorization	Published	1	0
KA-01009	Support Request	Published	1	0

Add Task

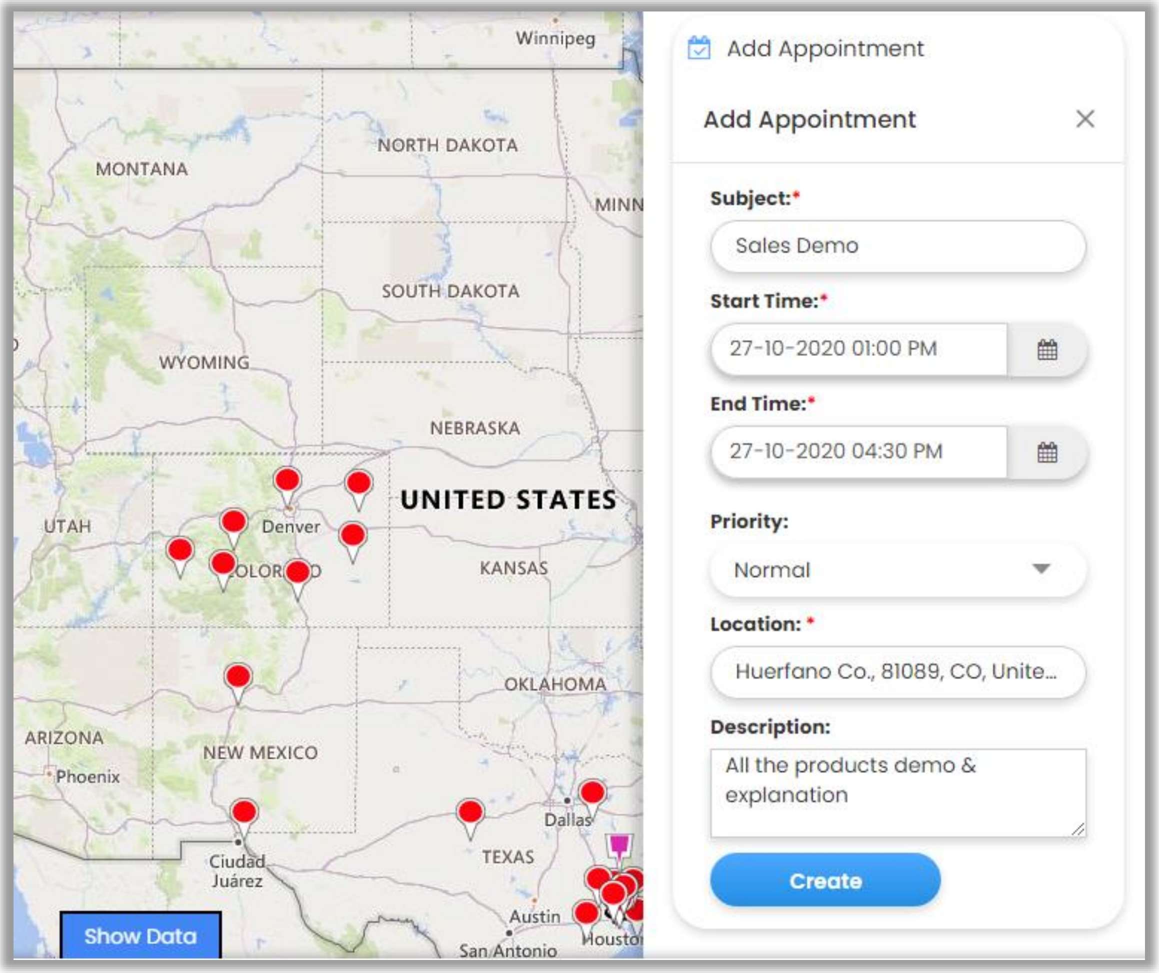
- You can add task for a record directly from map itself by clicking on "Add task" icon associated with a specific record.



- Any task can be added for a record along with their priority such as Low, Normal, and High.
- You can check the added task detailed view of record from Dynamics CRM side.

Add Appointment

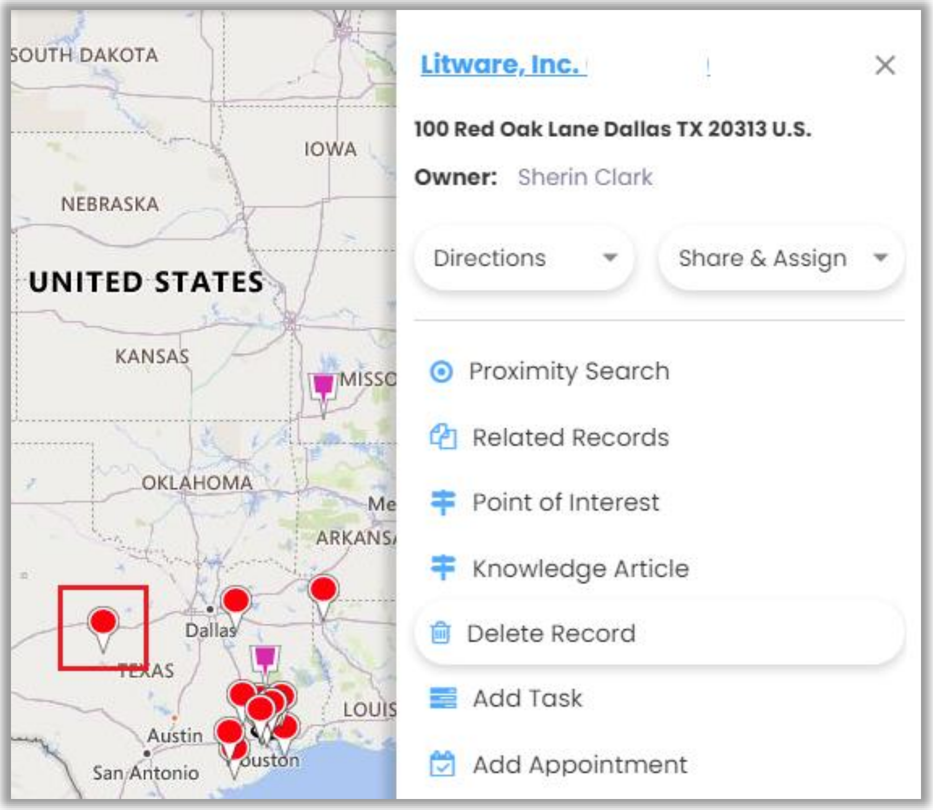
- You can schedule an appointment for a record by clicking on "**Add appointment"** icon associated with specific record.



- Appointment can be added for a record along with their priority such as **Low**, **Normal**, and **High**.
- Along with priority, you can also enter the location of meeting.
- The appointment that is added can be viewed in detailed view of record in Dynamics CRM.

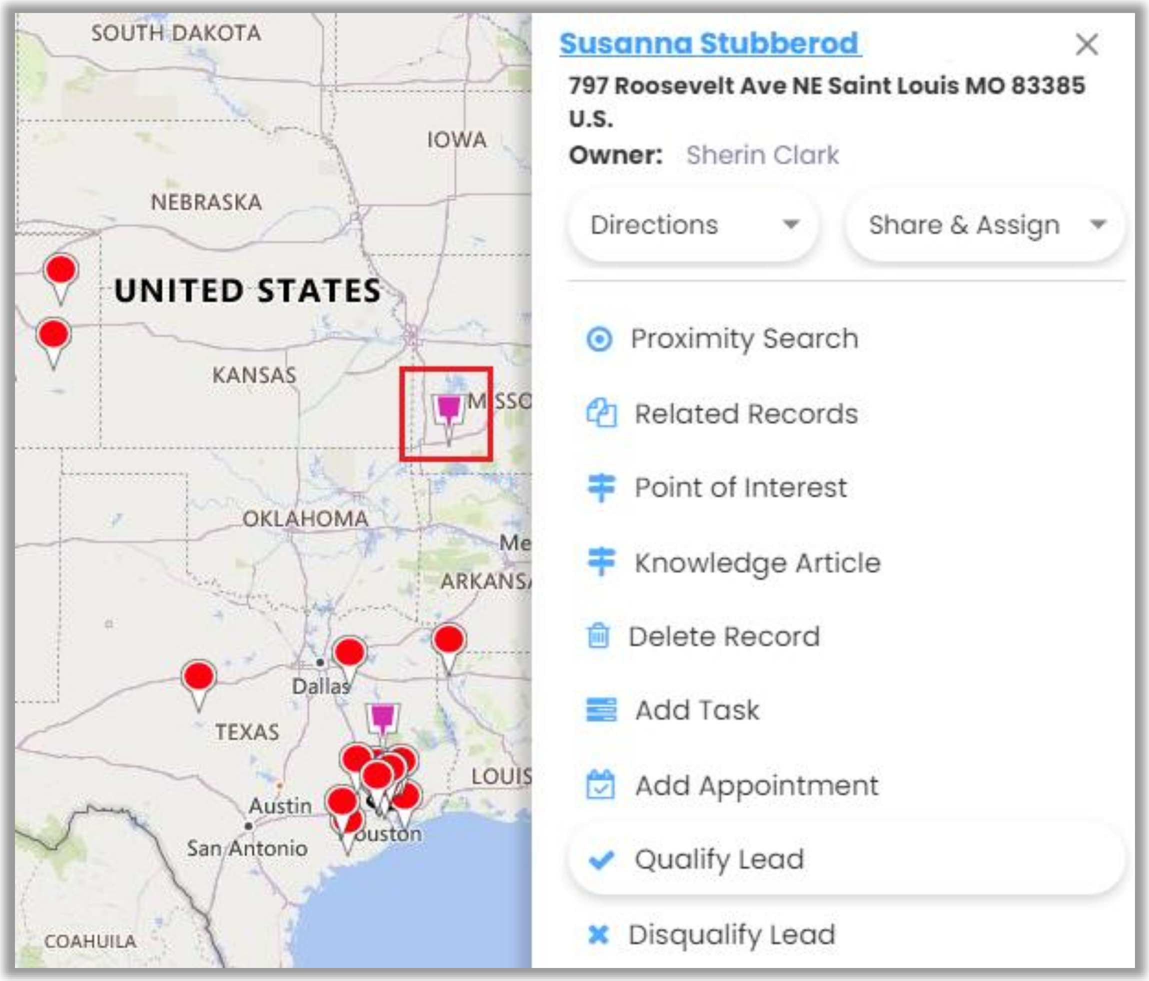
Delete Record

- By clicking on delete button, selected record from map gets deleted from the CRM.



Qualify/Disqualify Lead

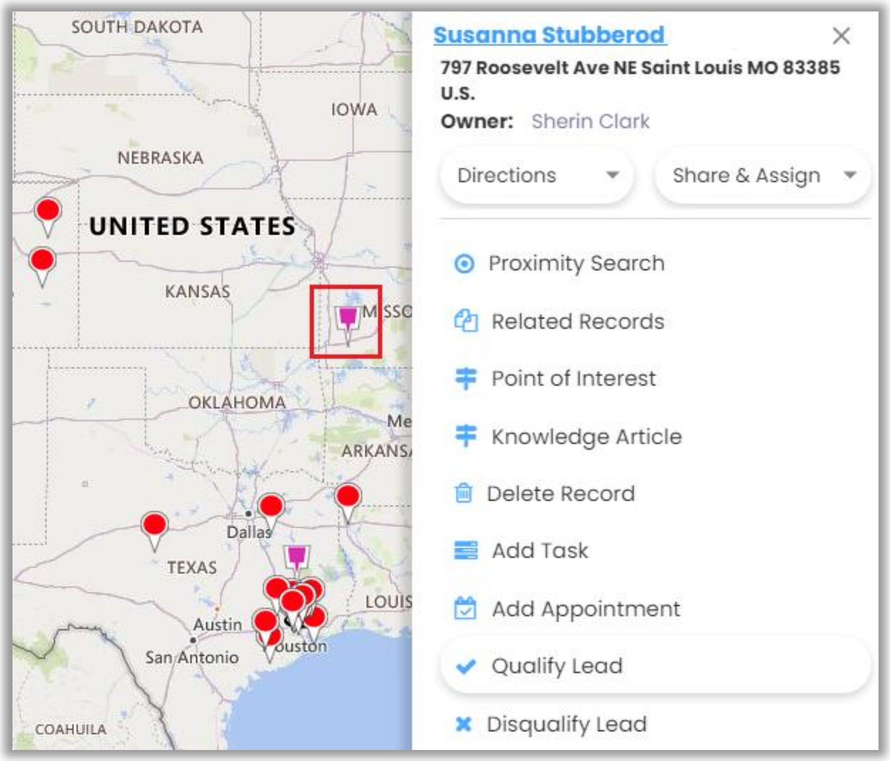
- By clicking on “**Qualify Lead”** icon, status of lead will get updated to close state and user will be redirected to opportunity page from the map. It is available only for record of lead entity.



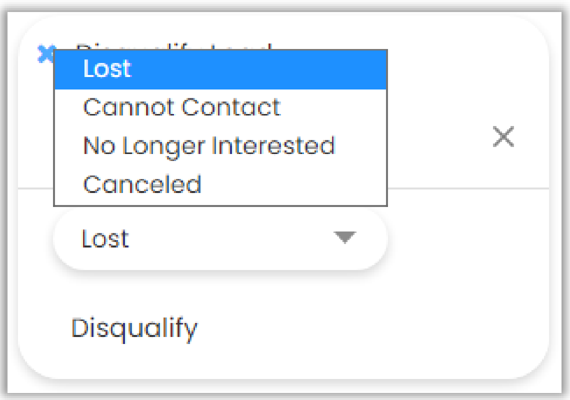
Note: Open leads will display option to qualify/disqualify lead. Once leads are qualified, those leads will be shown in Closed Leads view.

Disqualify Lead

- By clicking on "**Disqualify Lead"** icon, leads will get disqualified and its status will be changed to close.



- Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Cancelled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.



- Disqualified leads can be reactivated by clicking on Reactivate Icon present with closed lead record.

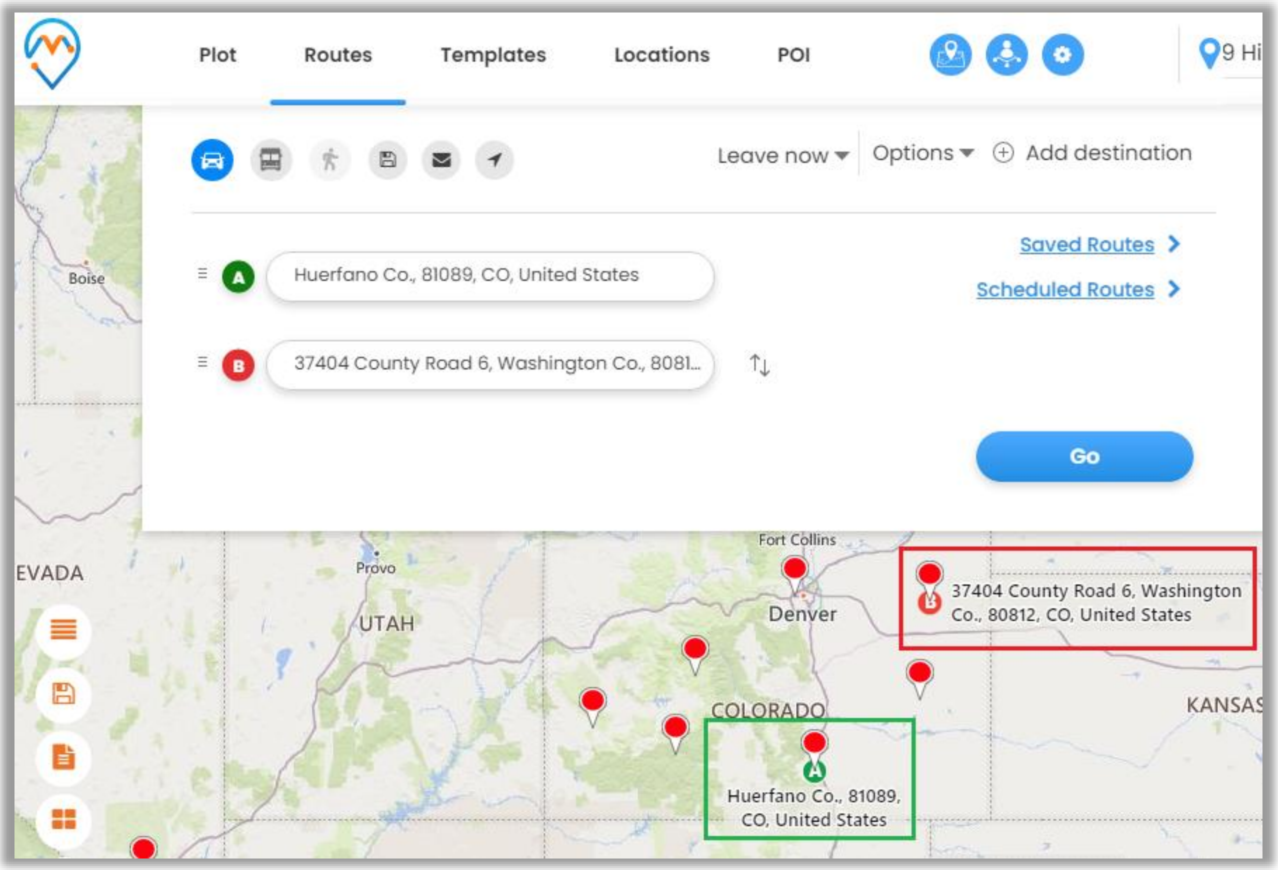
Reactivate Lead

- By clicking on "Reactivate Lead" icon, leads will be reactivated, and its status will be changed to Open.

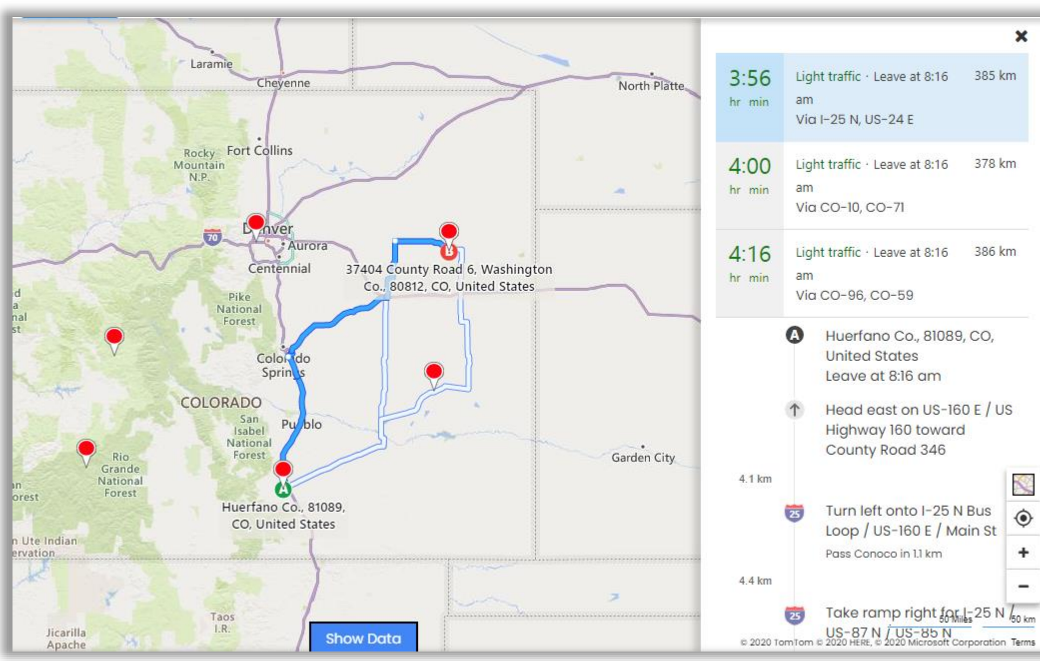
<u>Note</u>: On reactivating lead, view of lead will get updated from closed leads to open leads.

Direction

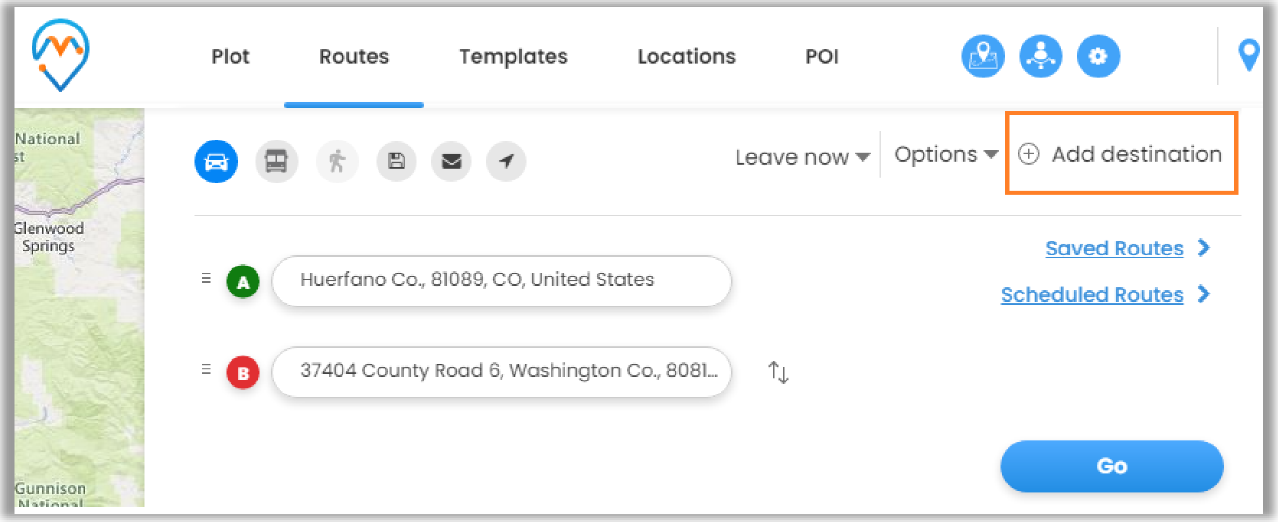
- Once you add the records to 'Origin' & to 'Destination', you can check in to the **Routes** tab. From here by clicking on the **GO** button, you will get the route navigation with details.



- From the **Route** tab, you can also add multiple address and get directions. You can reverse the direction by clicking on this icon ⇅.

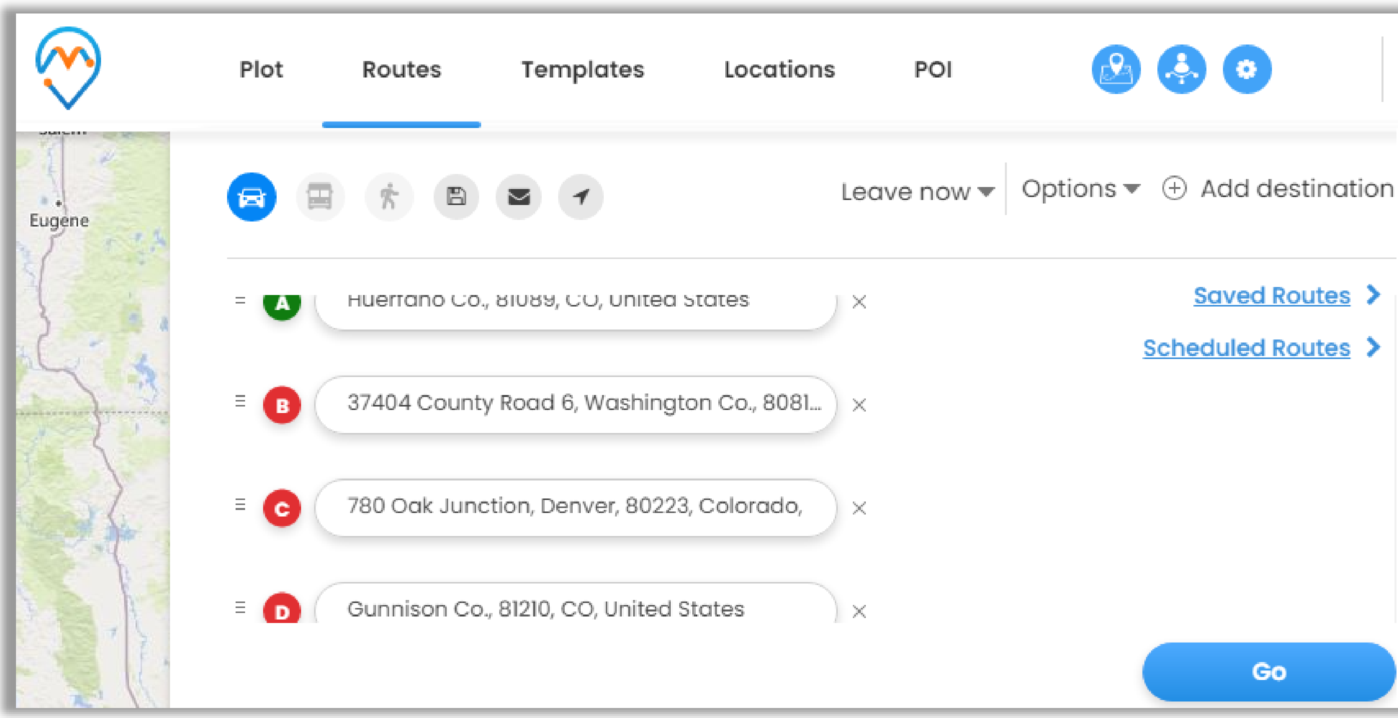


- On the Map, you will get directions based on Driving including alternate direction if any.
- You can add multiple way points by clicking on 'Add Destination'. You can add a maximum of 25-way points.

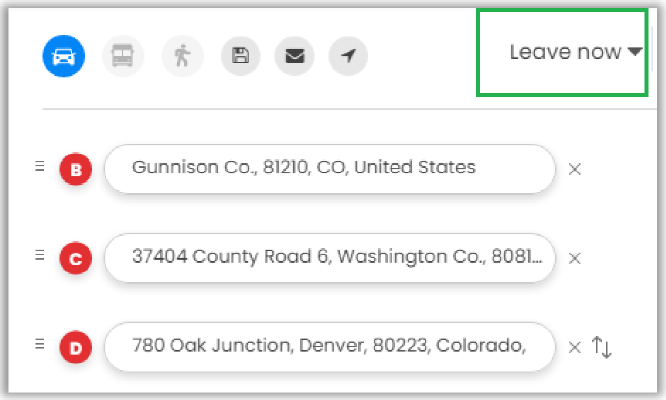


Multiple Routes

- By clicking on any location *or* plotted records, click on **Add to Destination** to add multiple way points or you can add manually by clicking on the **Add Destination** from the 'Routes tab'. As you add all the required location and click on **GO** button, you will get the routes based on the location of multiple way points.

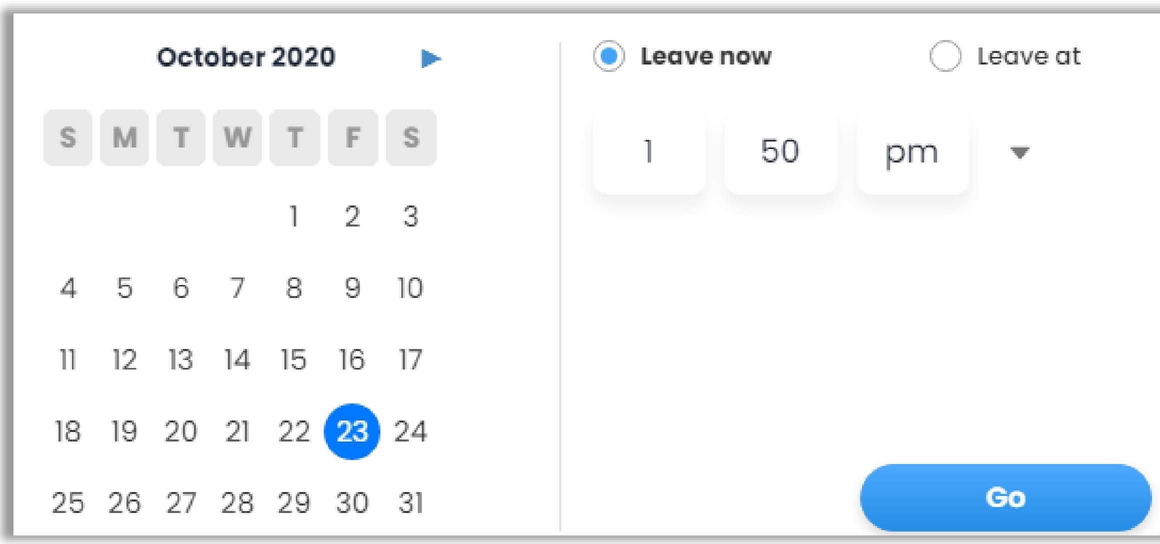


- For all the waypoints added in the route, each way point can be dragged to reorder their position in the route.
- After reordering the route, it will immediately reflect on the map also.

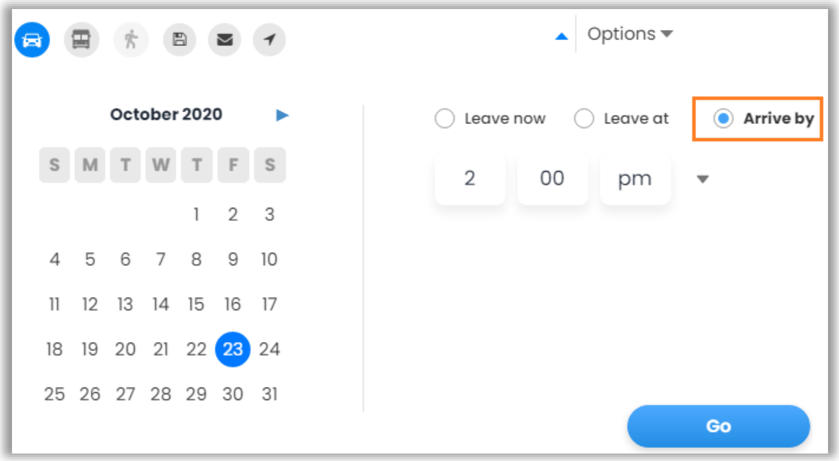


- You can select the time at which the generated route is going to be used by you.
- For that click on **Leave now** option.

- By clicking on **Leave Now**, you will get **Leave now**, **Leave at,** and **Arrive by** options.
- Select the date and time when you want to travel.

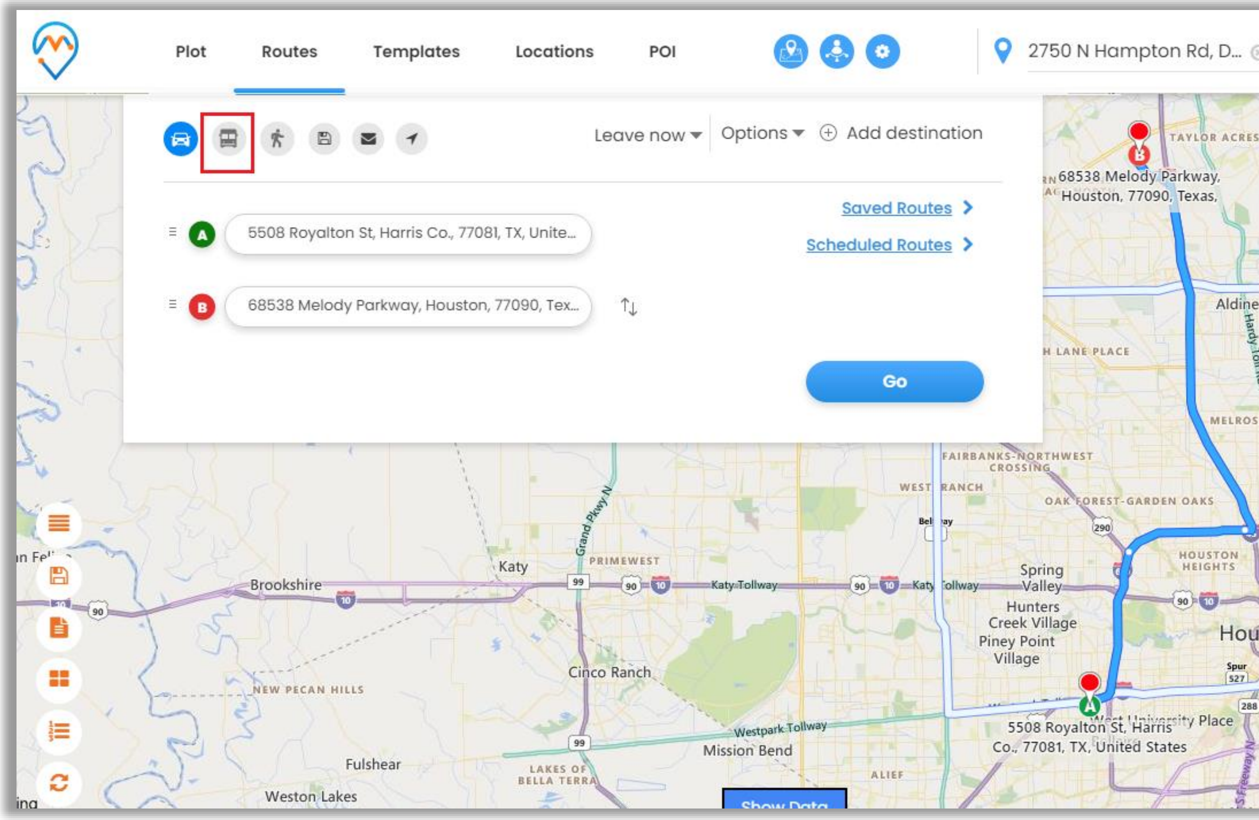


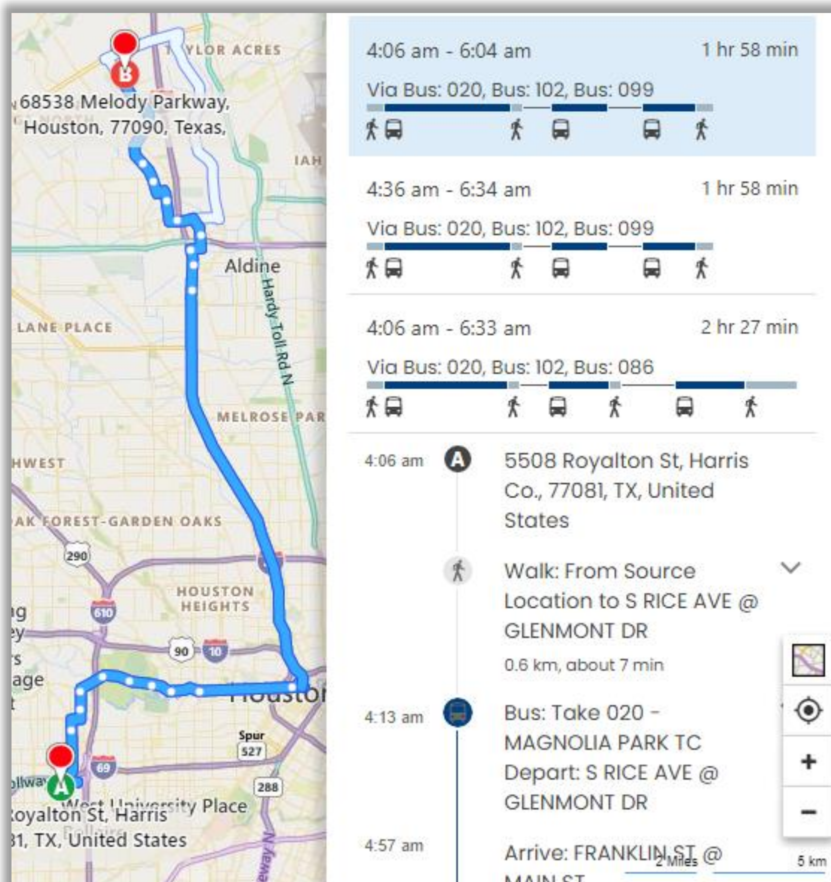
- **Arrive by** option is only available when there are only **Origin** and **Destination** locations set.



- After selecting the location between **Origin** and **Destination**, it will list all possible routes and highlight the optimized route.

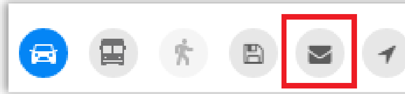
- You can also get directions based on means of transport like **Public Transit** and **Walking**.



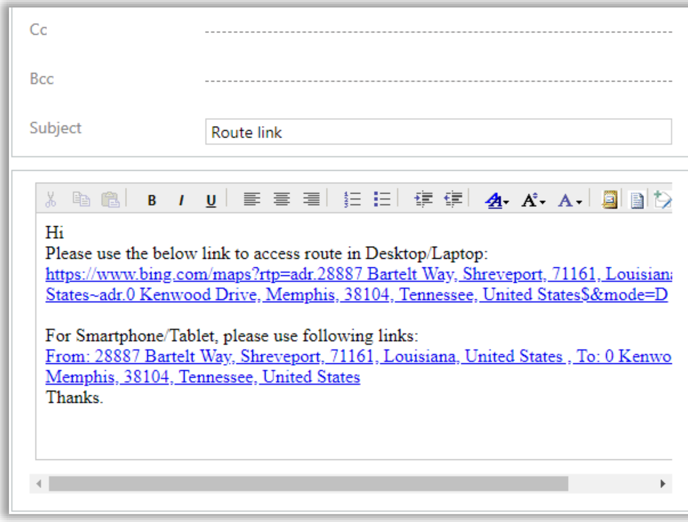


Email Route

- You can share a route in mail by clicking on Email icon.

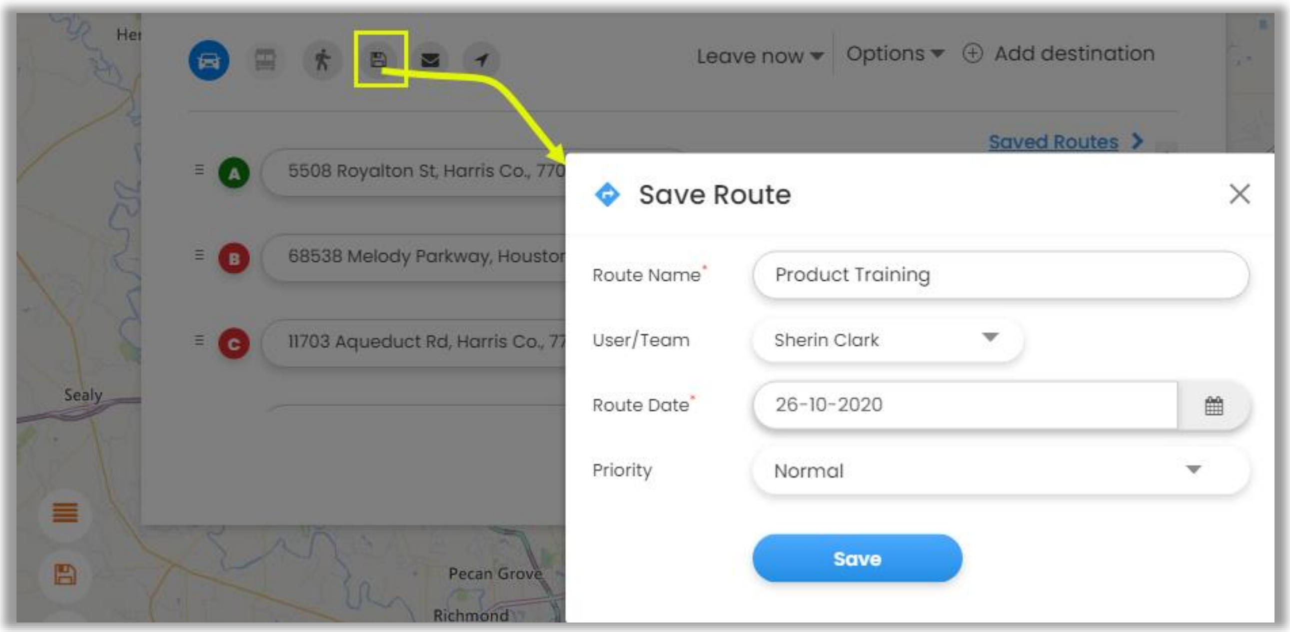


- As you click on it, the **Email** page will open with the **link of selected route**.



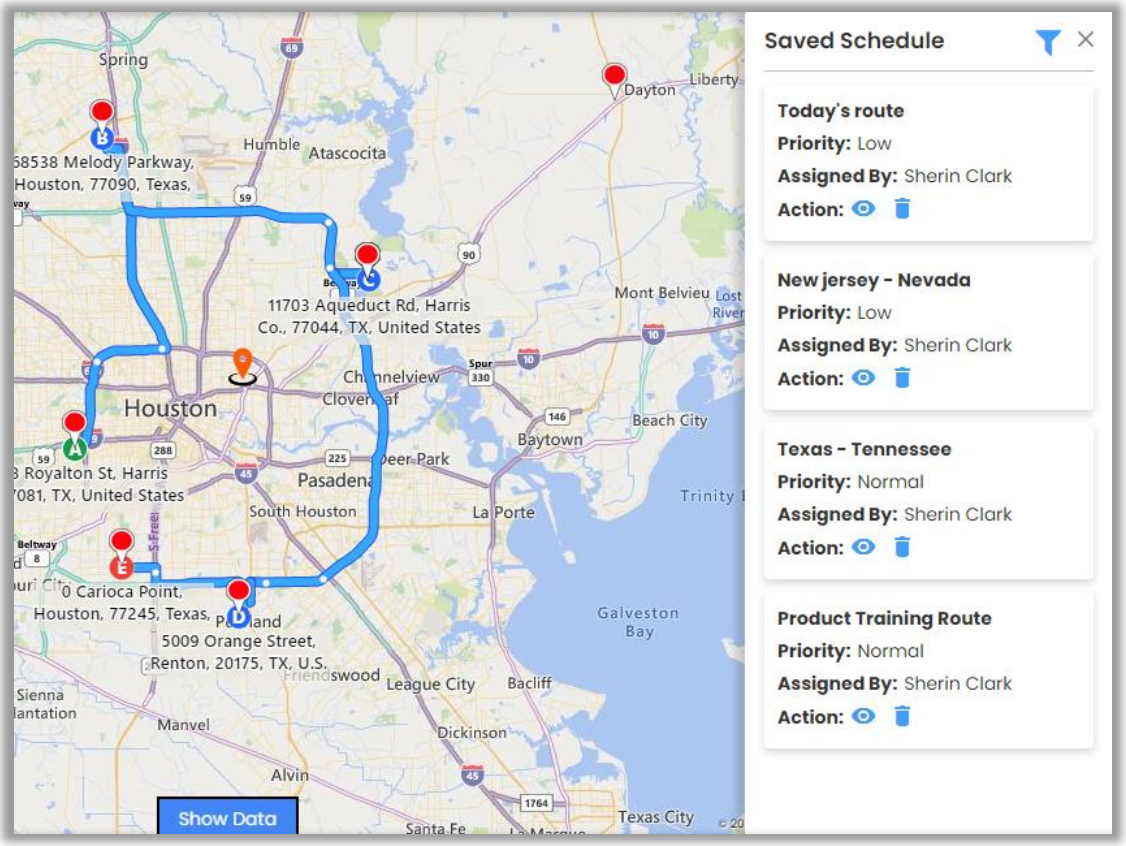
Save Route

- Also, the selected route can be saved for future reference. To save a route, click on the Save icon available on the top.

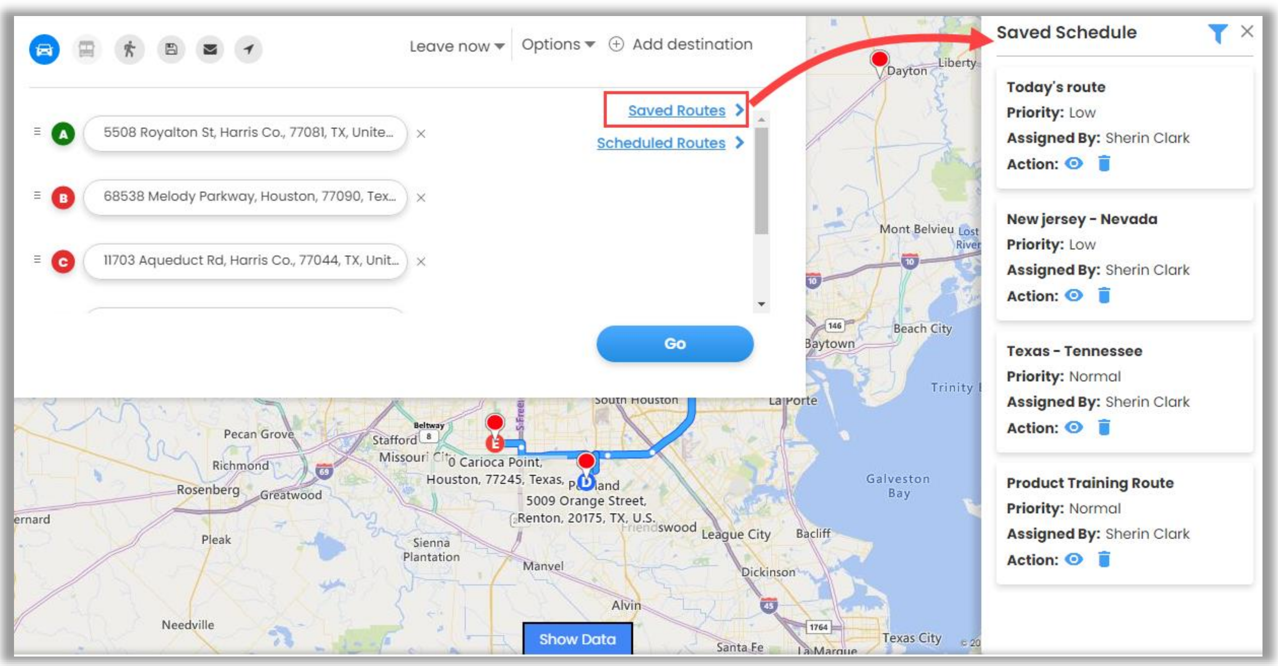


- By clicking on Save icon, it opens a dialog box where you need to provide a name to the route and user/team name to whom the route is being assigned.
- Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.

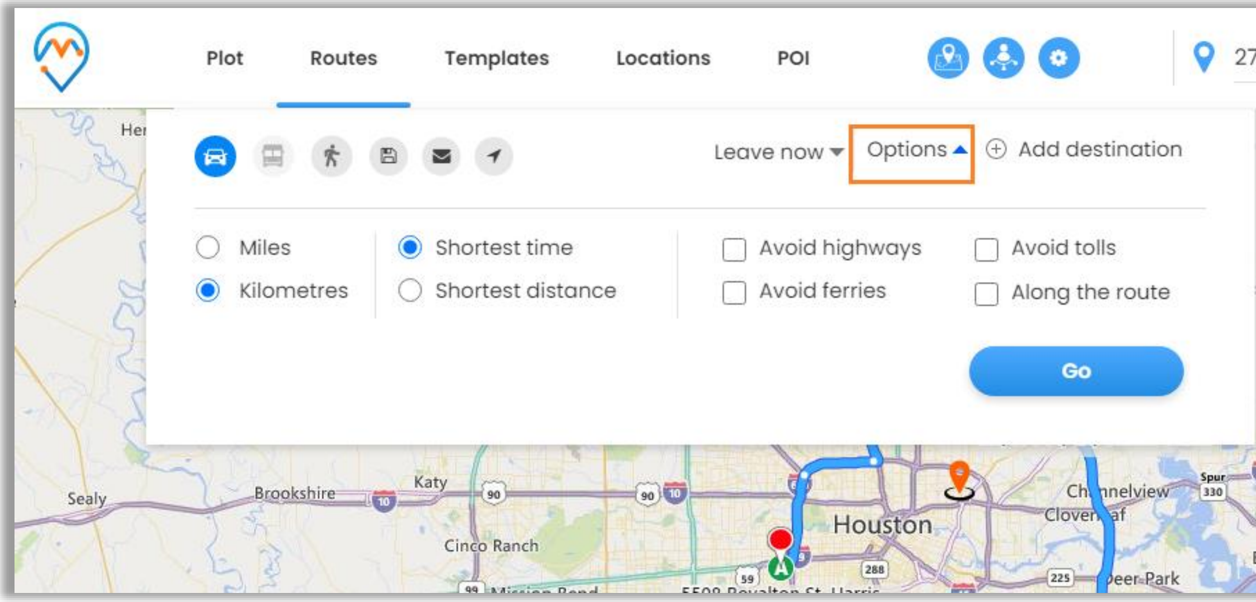
- By clicking on the Save button, you will be navigated to the Saved Schedule (Saved Routes).



- You can preview the routes and delete any if it is not required. Routes can also be filtered based on Start date and End date by clicking on this icon



- You can also apply various filters on route by clicking on “Options” dropdown. Various filters related to Distance are:
  - Miles/KM
  - Directions: Shortest Time/ Distance
  - Avoid Highways
  - Avoid Tolls
  - Avoid Ferries
  - Along the Route Search

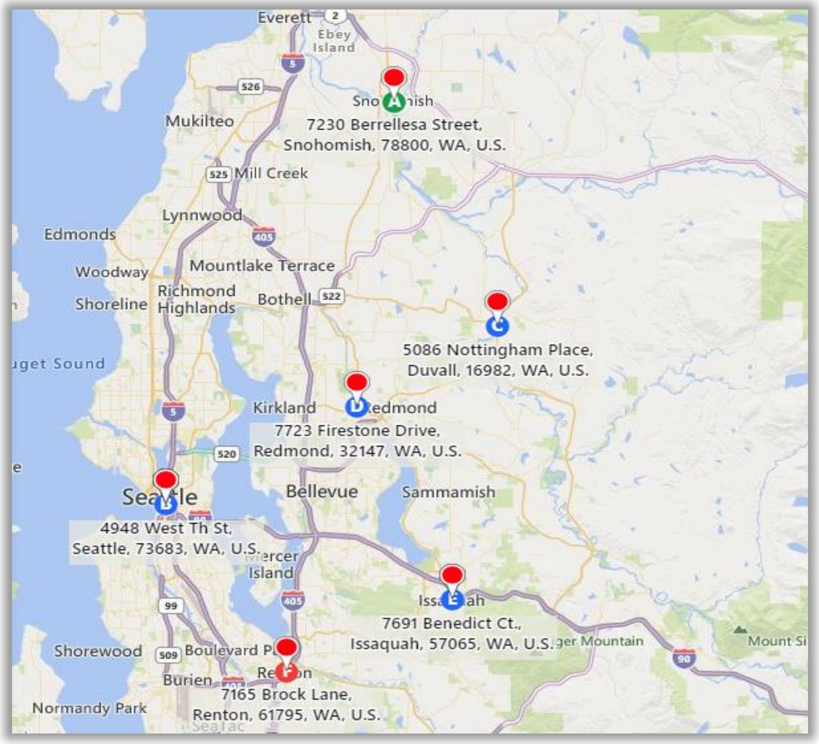


- Selecting **along the route** search option prompts user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of plotted route and displays pin in different colors than that which are within the route.

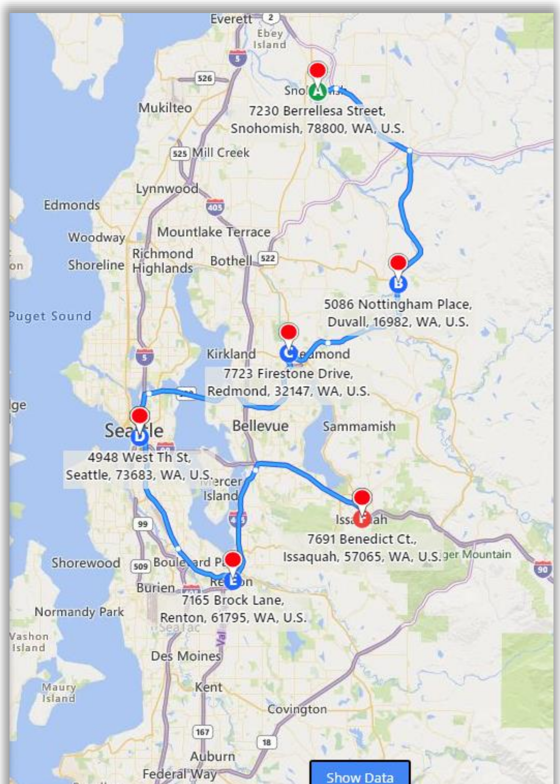
SPF (Shortest Path First)

- If Route optimization is enabled from Configuration, then it will short the added routes with SPF algorithm. It can rearrange route according to their distance from each other.

Before SPF



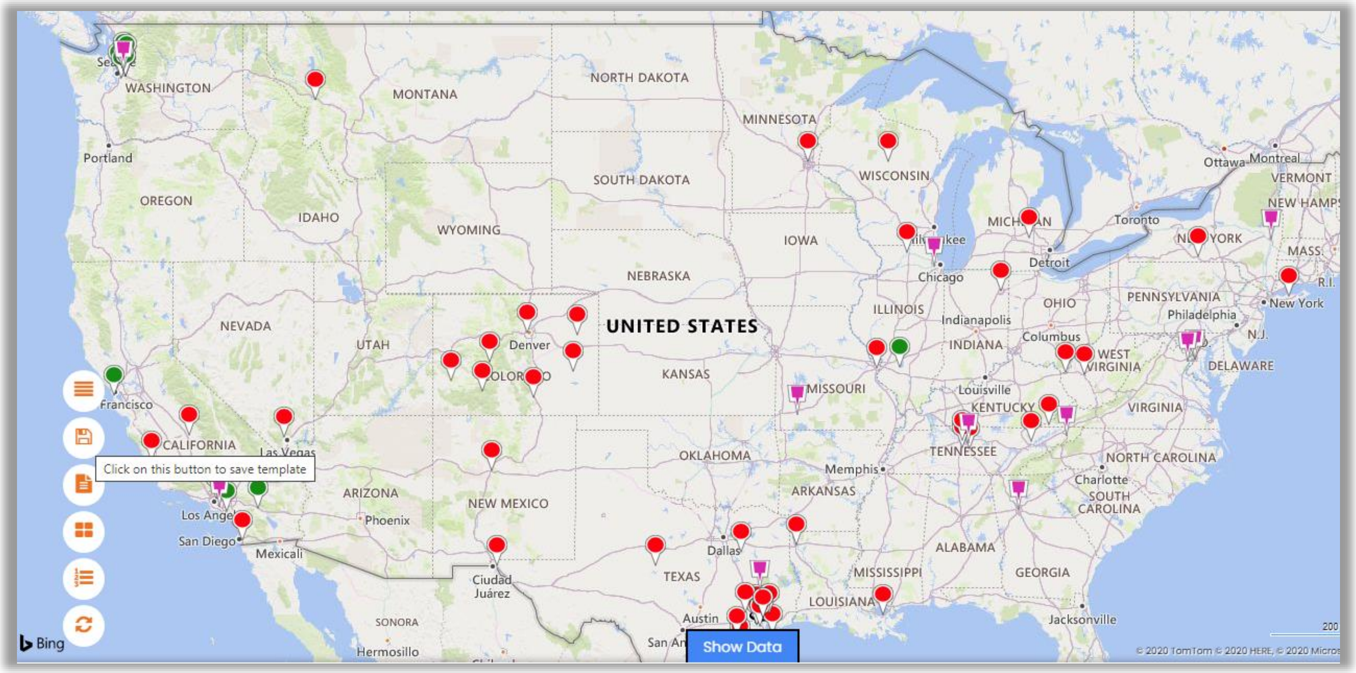
After SPF



Note: If you have enabled the **SPF** from the Default Configuration, only then SPF algorithm gets applied on the route.

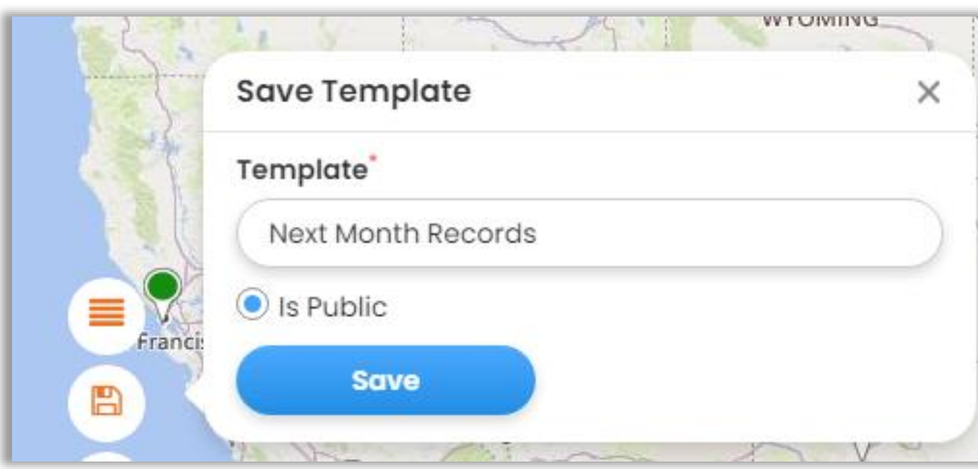
Templates

- Templates feature helps you save map configurations so that you can come back to them later and tweak them according to requirement.

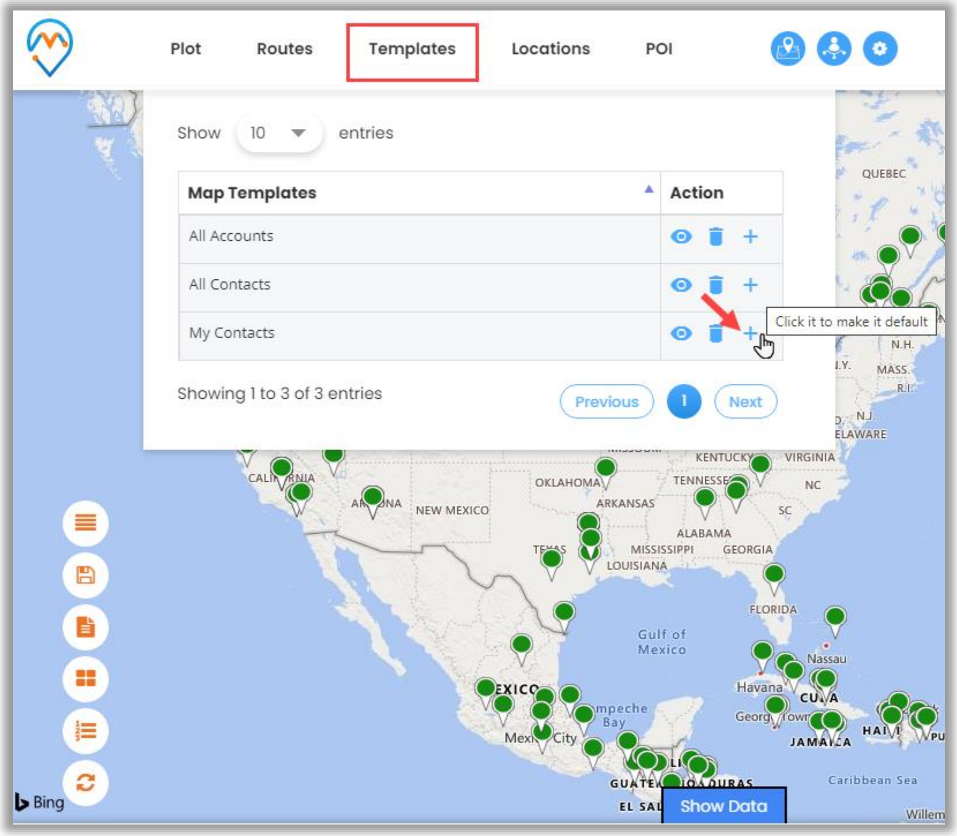


- If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

Note: If template is not public, only admin and the user who created that template will be able to view it.



- Under Templates section, logged in users can see all the templates created by them or the templates that are made public.

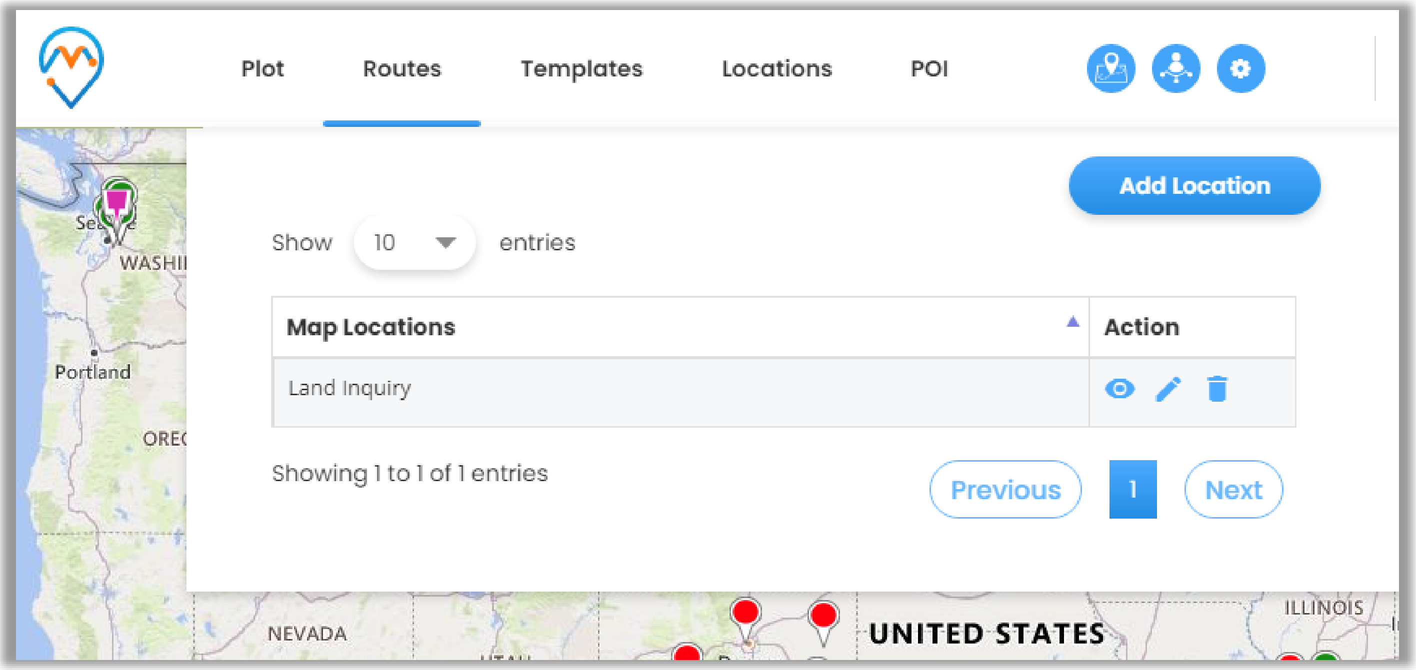


- The templates can be previewed by clicking on View icon or You can delete as per your requirement.

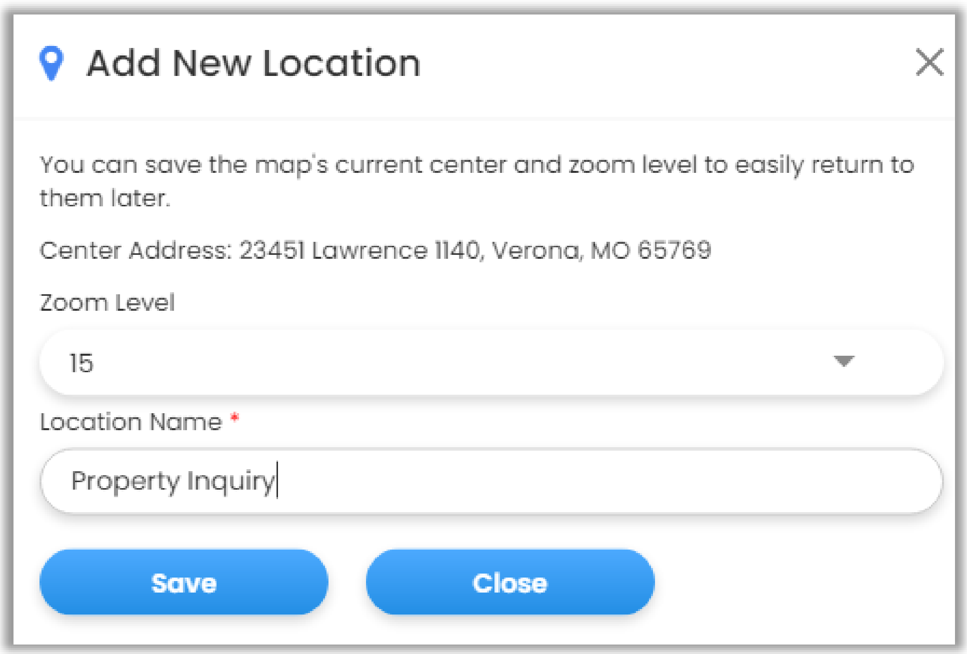
Locations

Add New Location

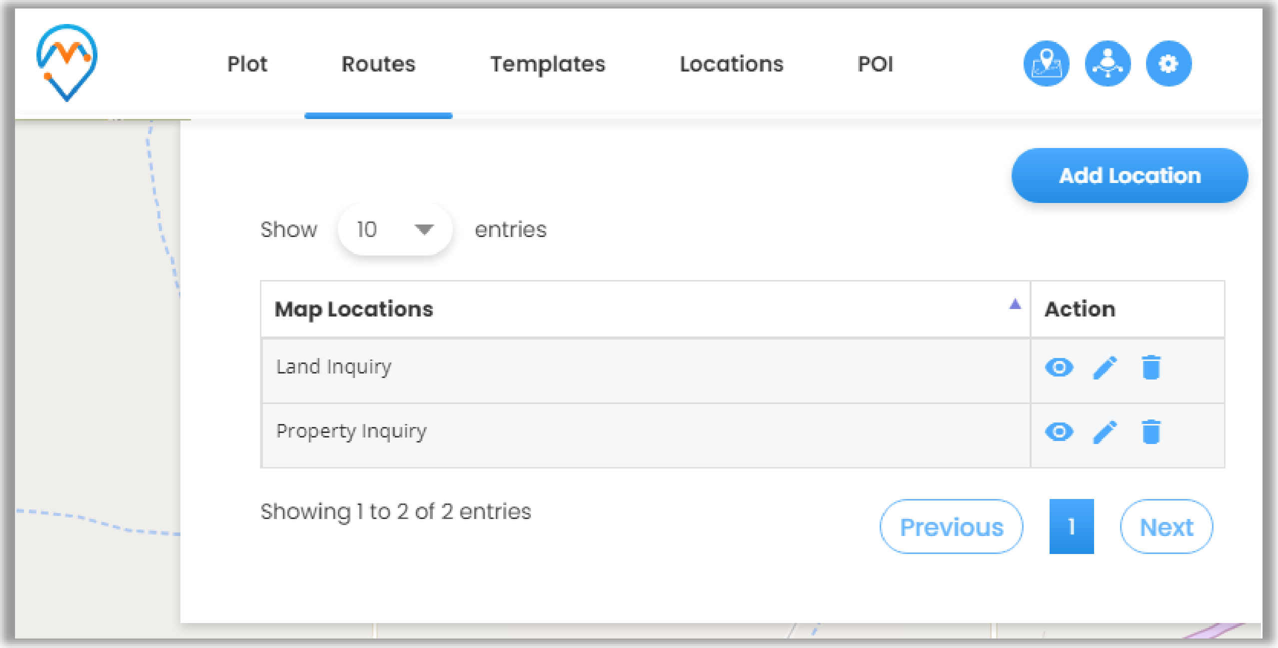
- You can add the important location like property, land inquiry purposes, from the map by right clicking on that specific location → **Add Locations**.



- By clicking on the **Add to Location**, Add New Location popup will appear. The Zoom level will be selected as per the Map view and enter **Location** Name. Click on **"Save"** button to add location.

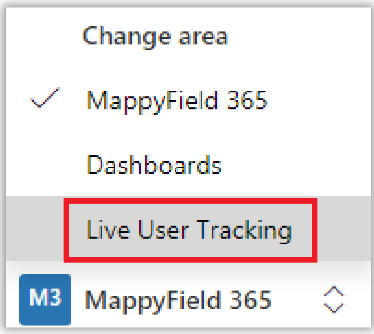


- You can check the important saved locations from the Locations tab and edit/delete the locations as per your need.


Plot
Routes
Templates
Locations
POI
Add Location
Show
10
entries
Map Locations
Action
Land Inquiry
Property Inquiry
Showing 1 to 2 of 2 entries
Previous
1
Next

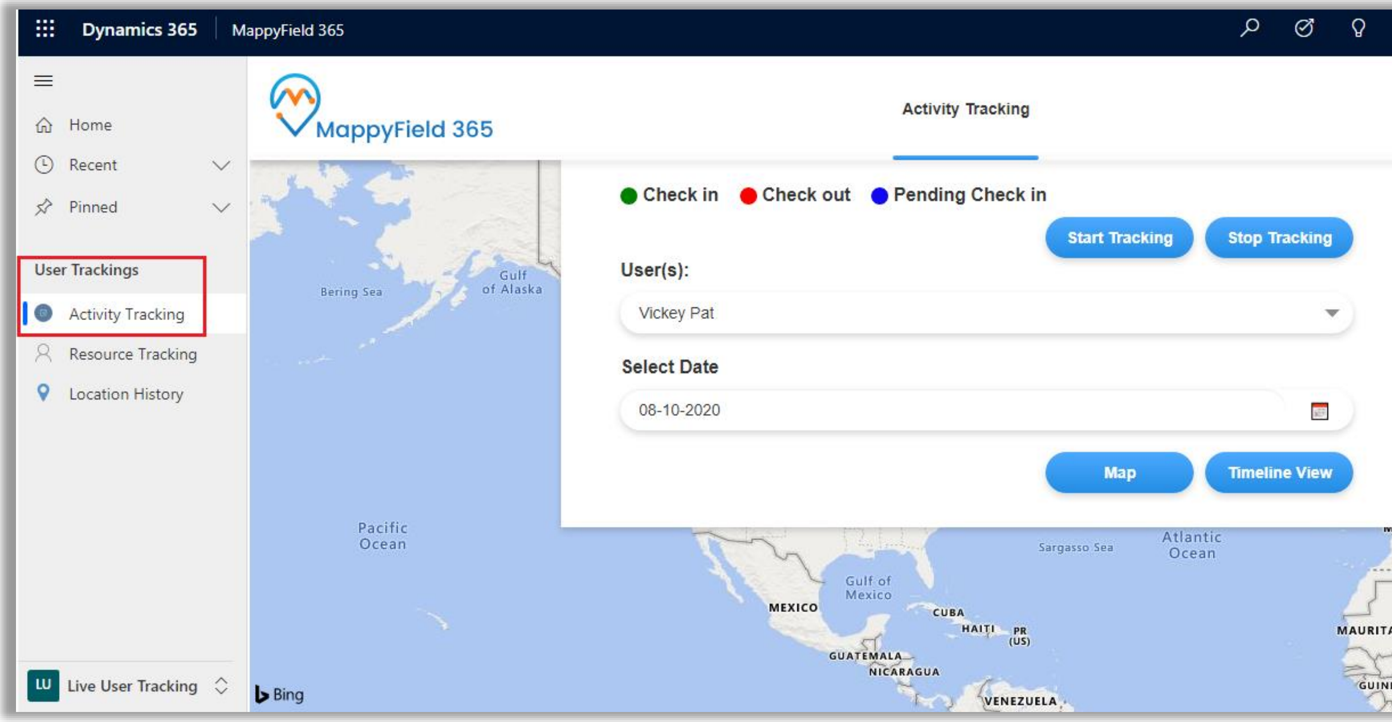
Live User Tracking

- Being an administrator of Dynamcis365, you can check live location of your team (users).
- If you have configured the Firebase in the MappyField 365, you can access the Live user tracking (for the users or resources). You can track all CRM users which are logged in on MappyField 365.
- For that navigate to the **Dashboard Configuration** from the MappyField left side navigation pane.

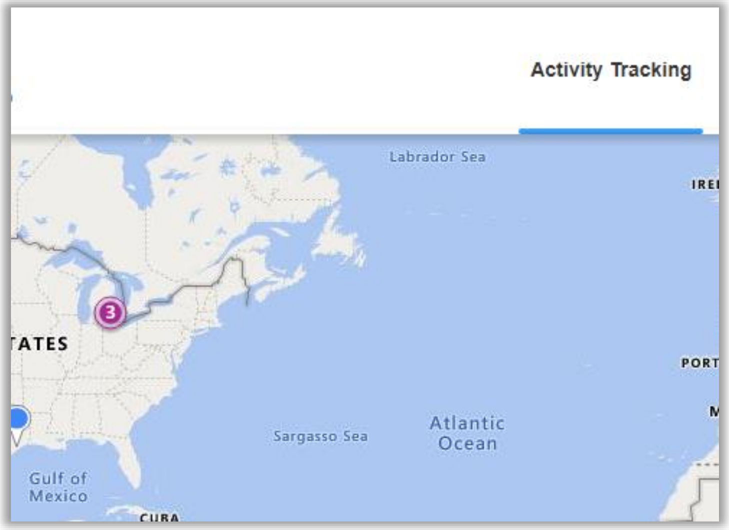


Activity Tracking

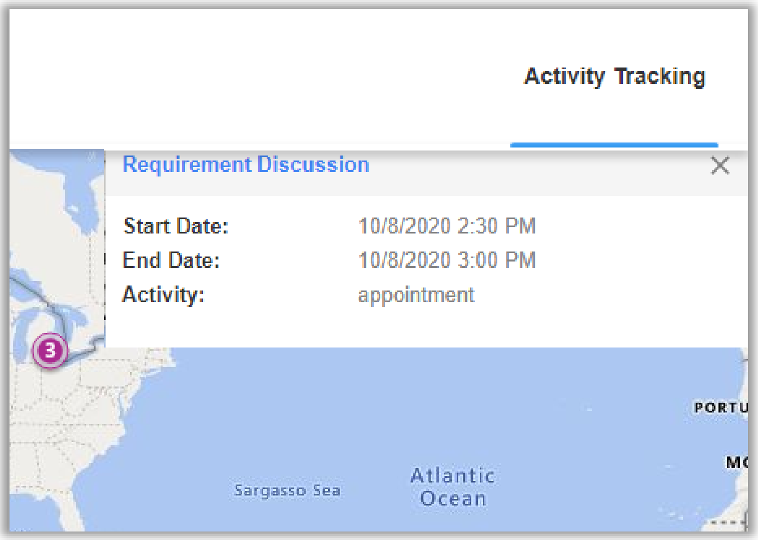
- By clicking on the ‘Live User Tracking’, you will navigate to the **Activity Tracking**.

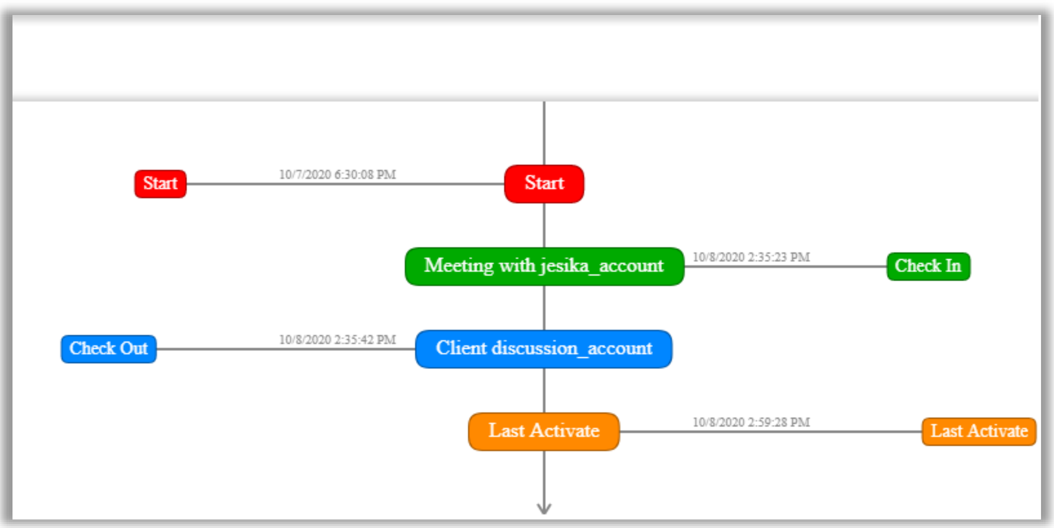


- Select the user(s) from the User list and select the date on which you want to check the visited location.
- You will get the Map & Timeline View to check the tracking on the map and the selected user(s) timeline.



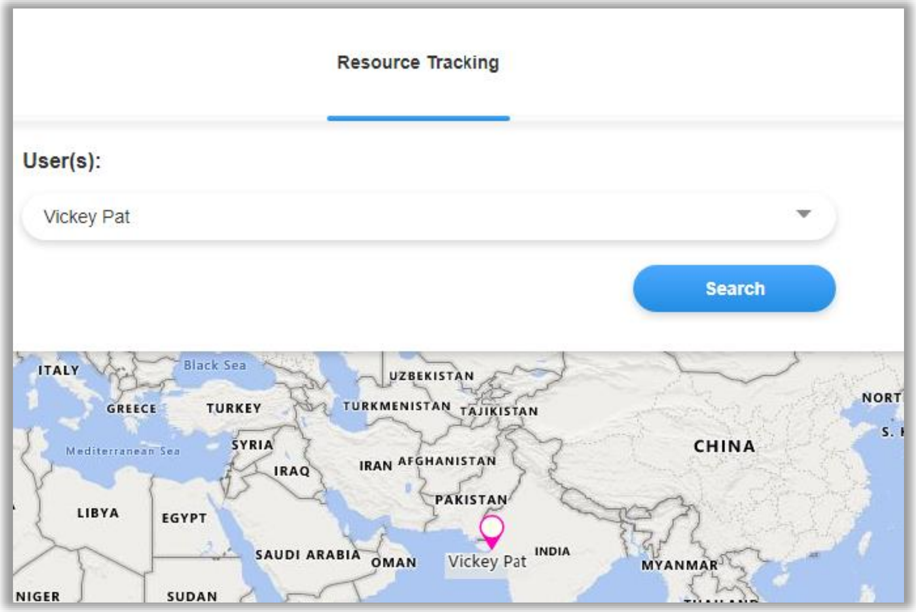
- By clicking on the **Start Tracking**, you will get the details of the user’s current activity on the map.

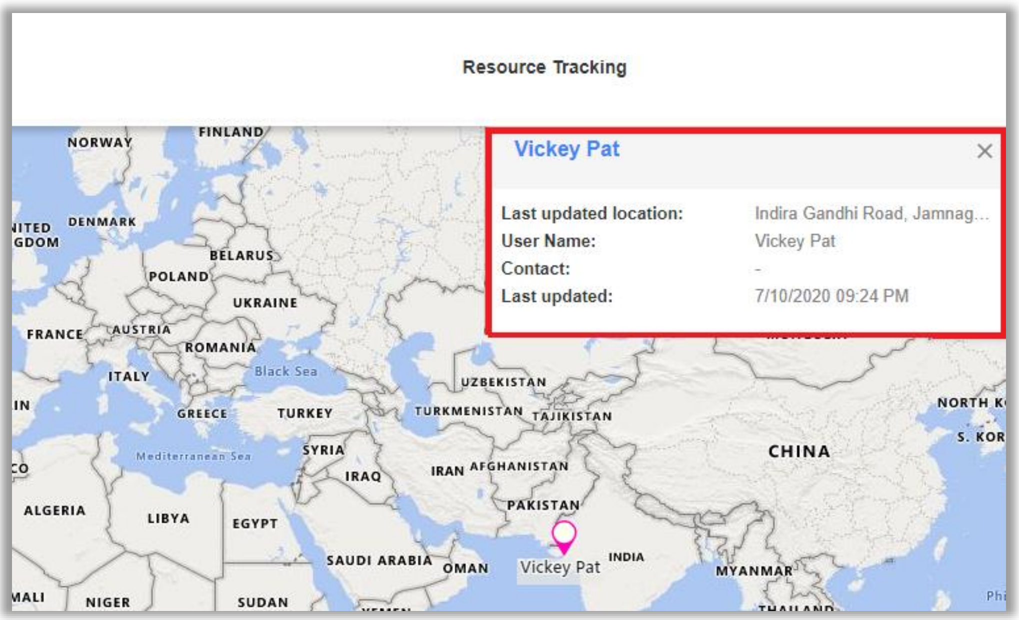




Resource Tracking

- Select the users to track them. By selecting the Users and click on **Search** button, User tracking details can be seen on the map.

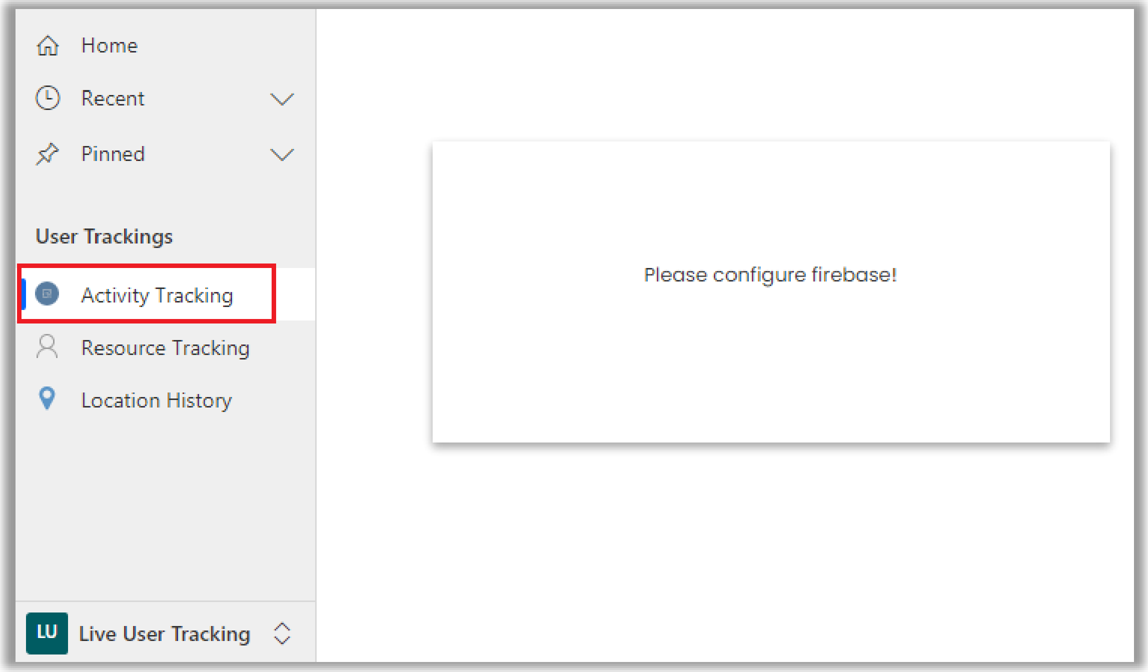




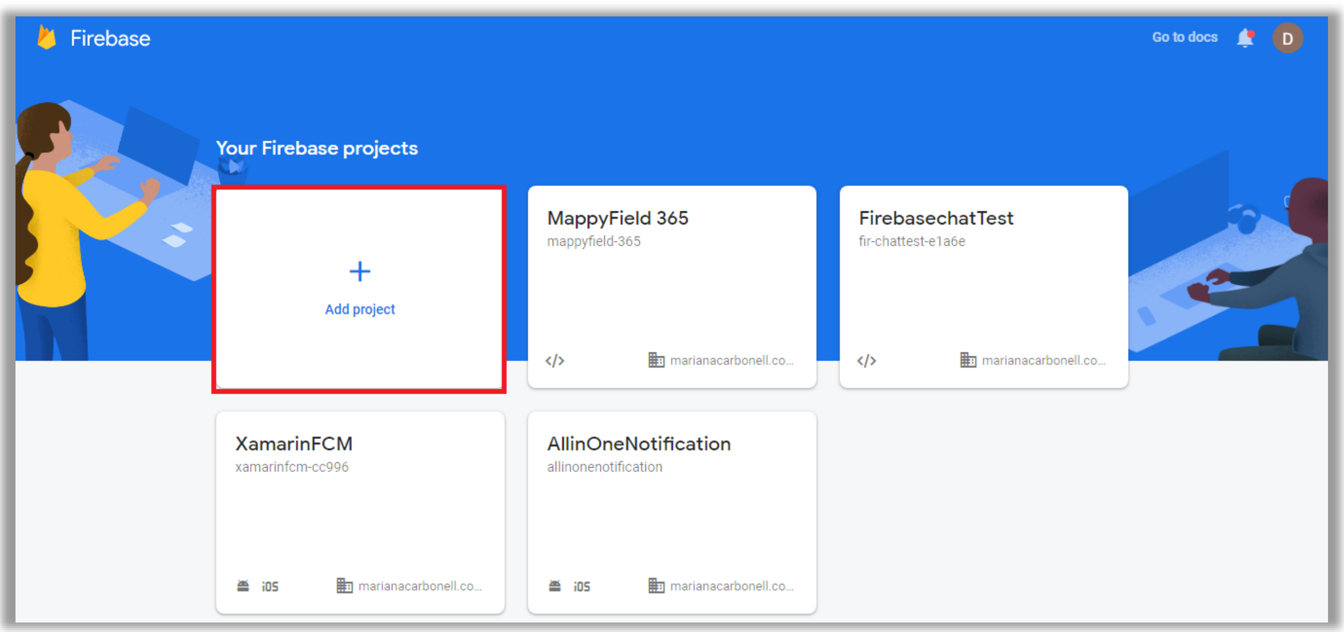
__Note__: Following conditions needs to be fulfilled in order to track user's location

- Configure the Firebase to enable user tracking in the MappyField 365.
- Track User Option only visible to admin user.
- User must have MappyField 365 role *or* able to access MappyField 365 and must be logged in to MappyField 365.
- User must allow location access from mobile *or* web through which user is using MappyField 365.
- MappyField 365 must be open in order to track user's location.
- In Every 5 Mins, Users' location will be updated.

How to configure the Firebase?

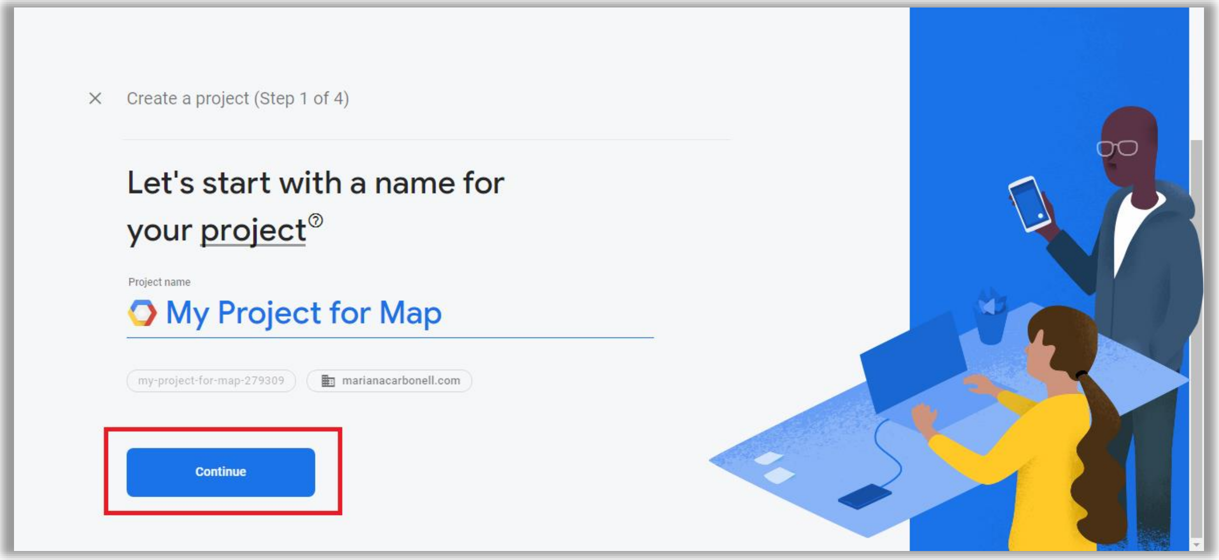


- We must configure the **Firebase** for "Live tracking". Follow the below steps:
  - Go the Firebase website, open this link: https://console.firebase.google.com/

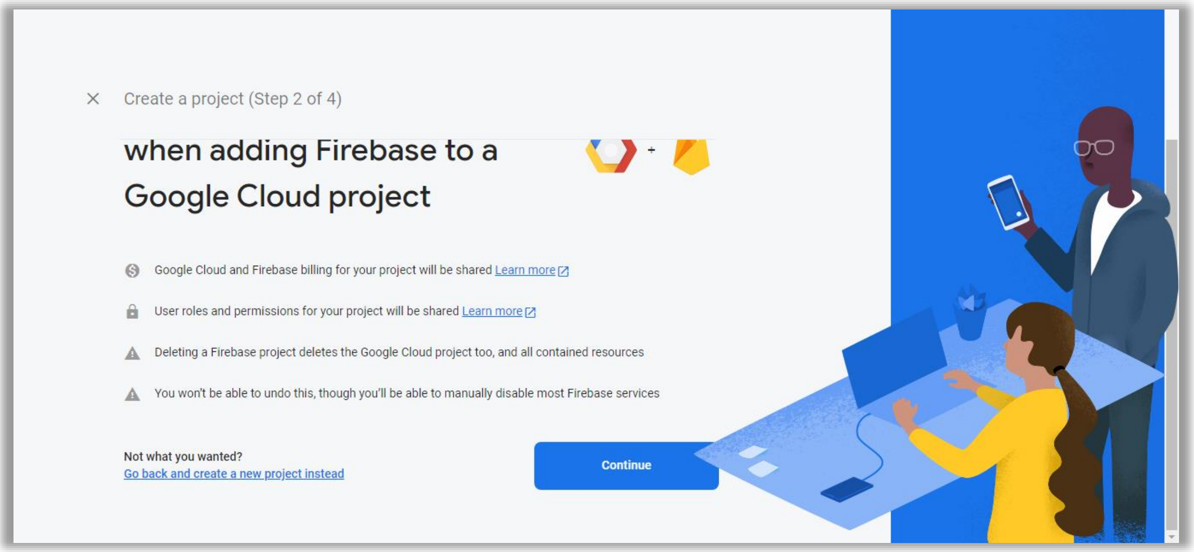


  - Here you need to add a new project by clicking on the **+ Add project**.

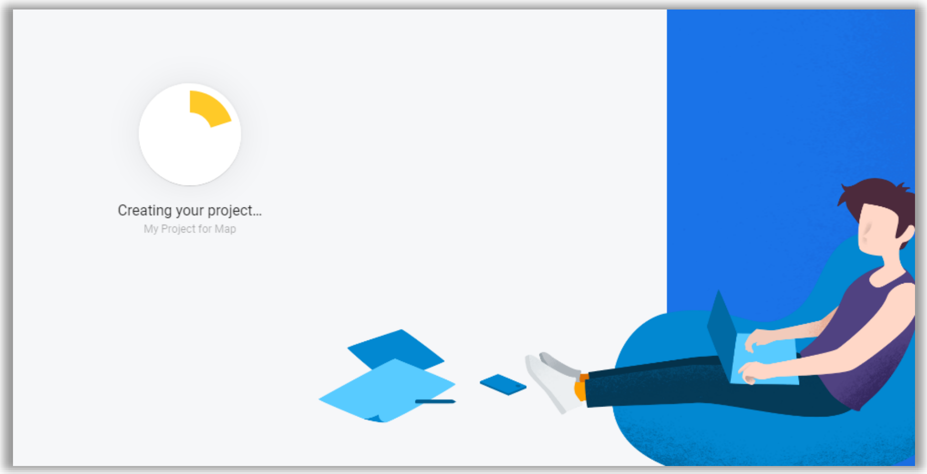
- Give a suitable name to your project and click on Continue to configure the details.

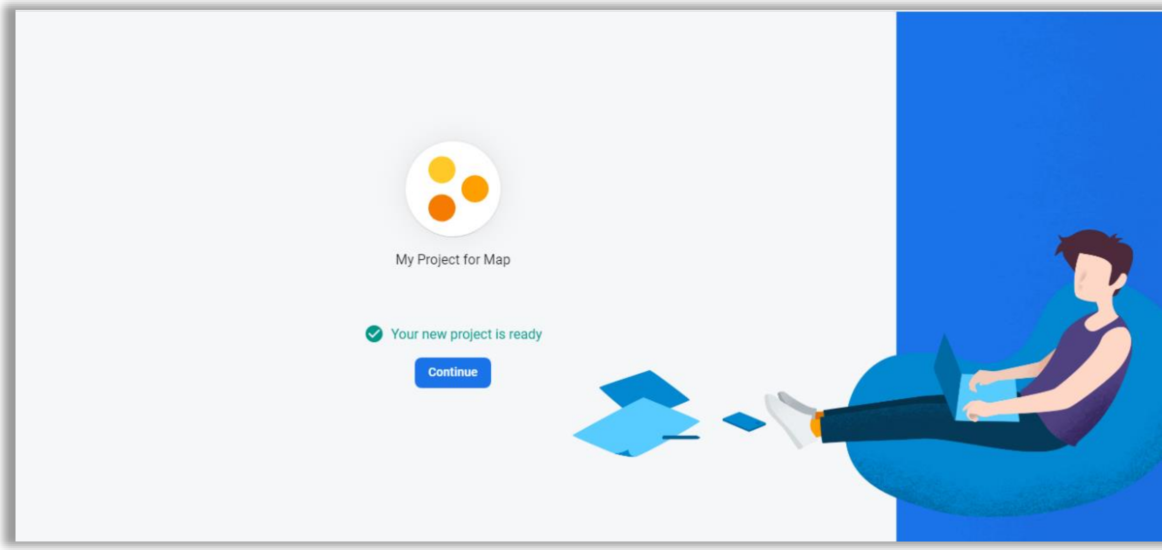


- In next, you will find the **"Add Firebase"**, click on that.

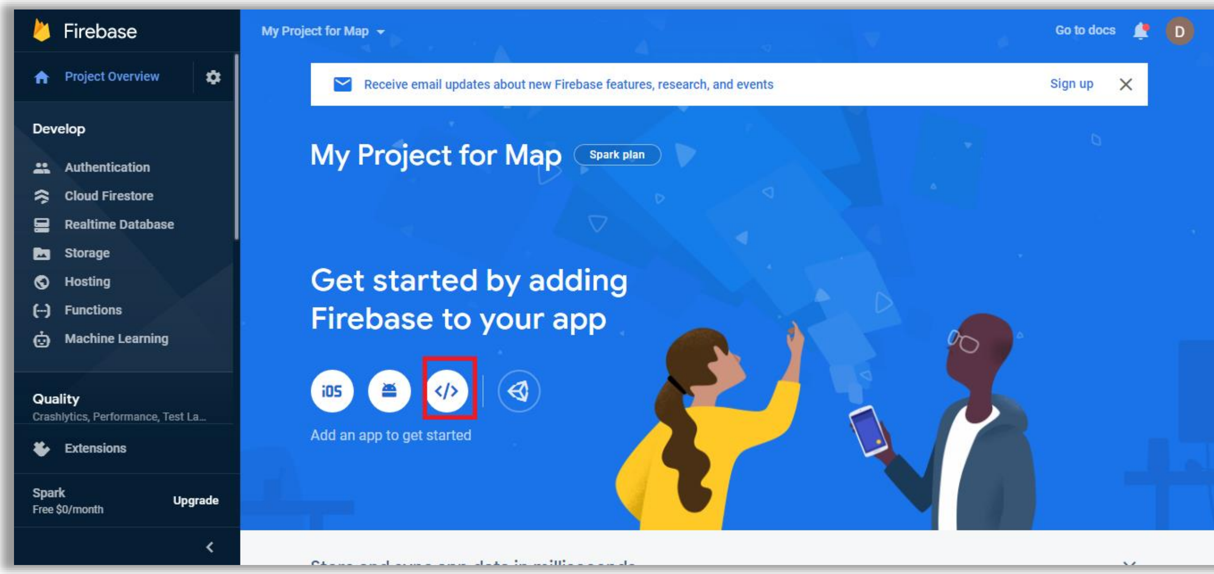


- By click on that, the project will be created.

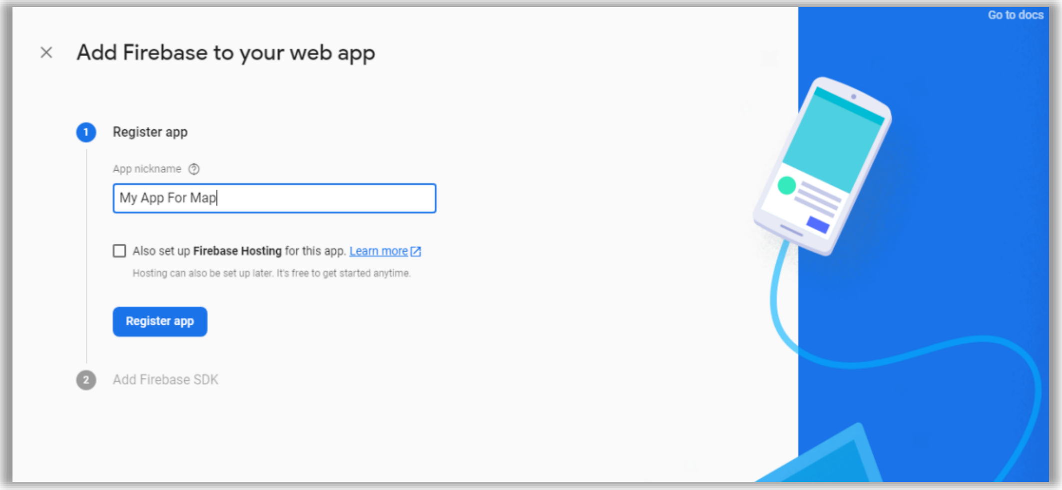




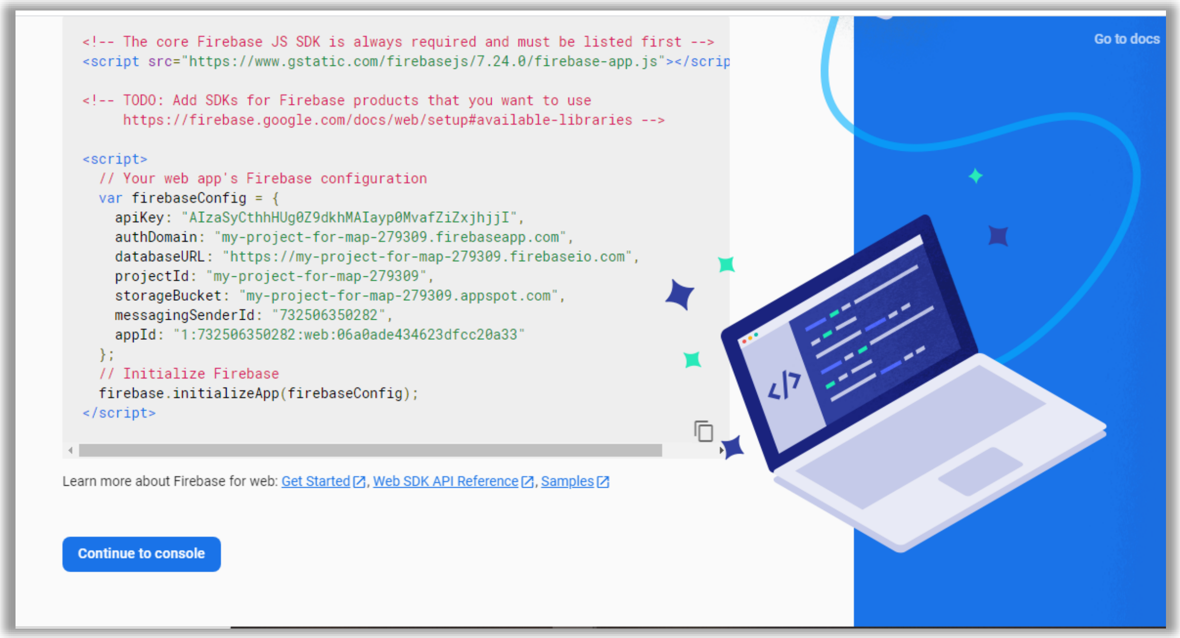
- Click on **Continue** for next details.
- Click on **</>** icon.



- Now register the app by inserting the relevant name to web app.



- ○ After registration the web app, you will get the script which you have to copy the code and you must enter in MappyField 365 configuration for live tracking.

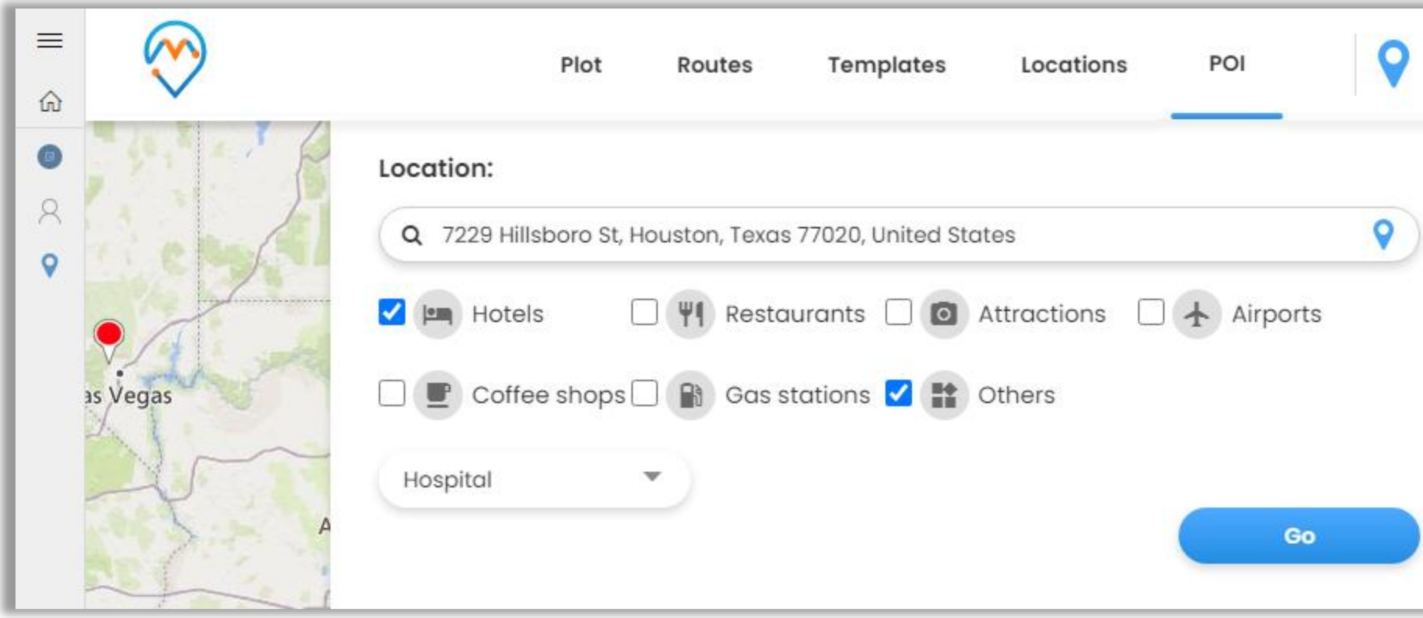


- ○ Click on Continue to console.

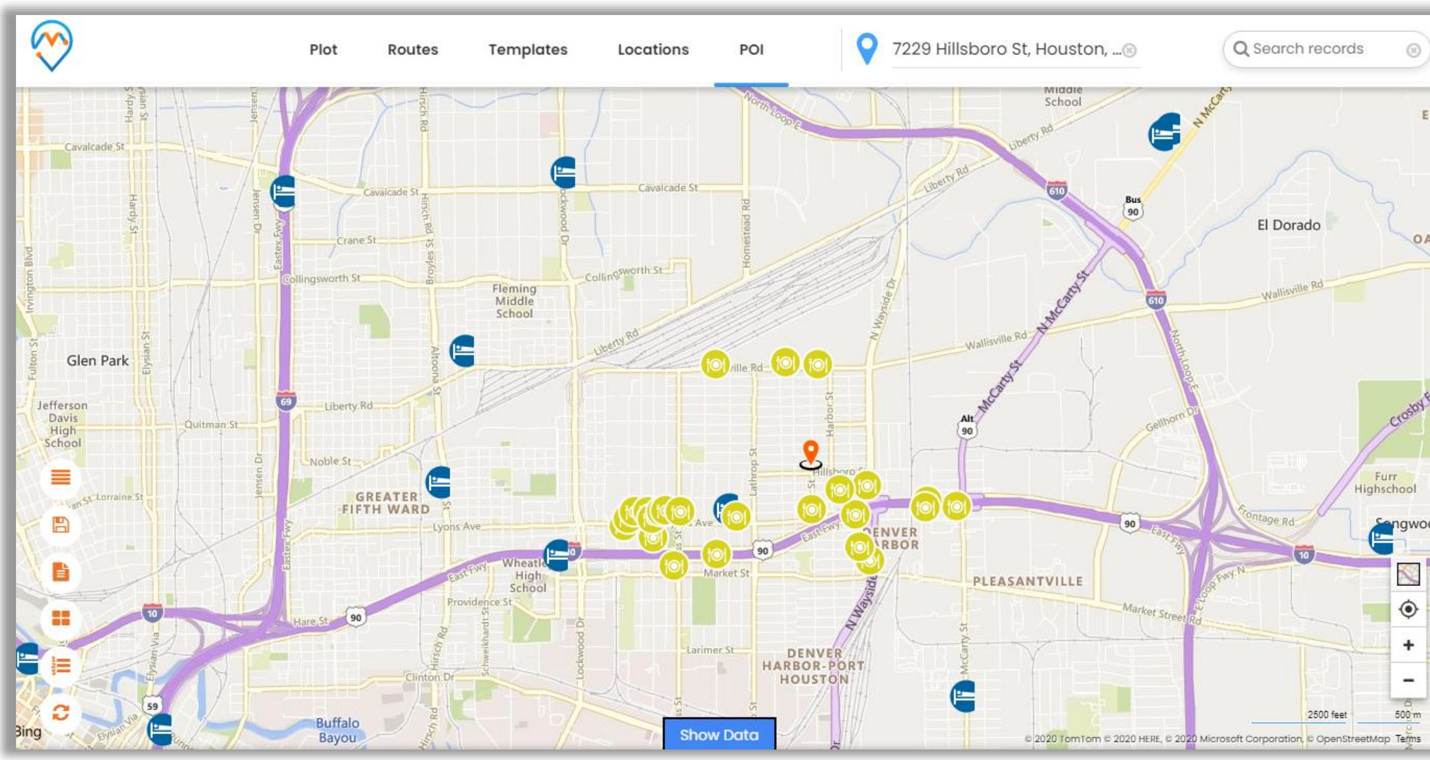
- In this way, by configuring the Firebase and copy the code into the MappyField 365 configuration, you can enable the Live User tracking feature.

POI-Point of Interest

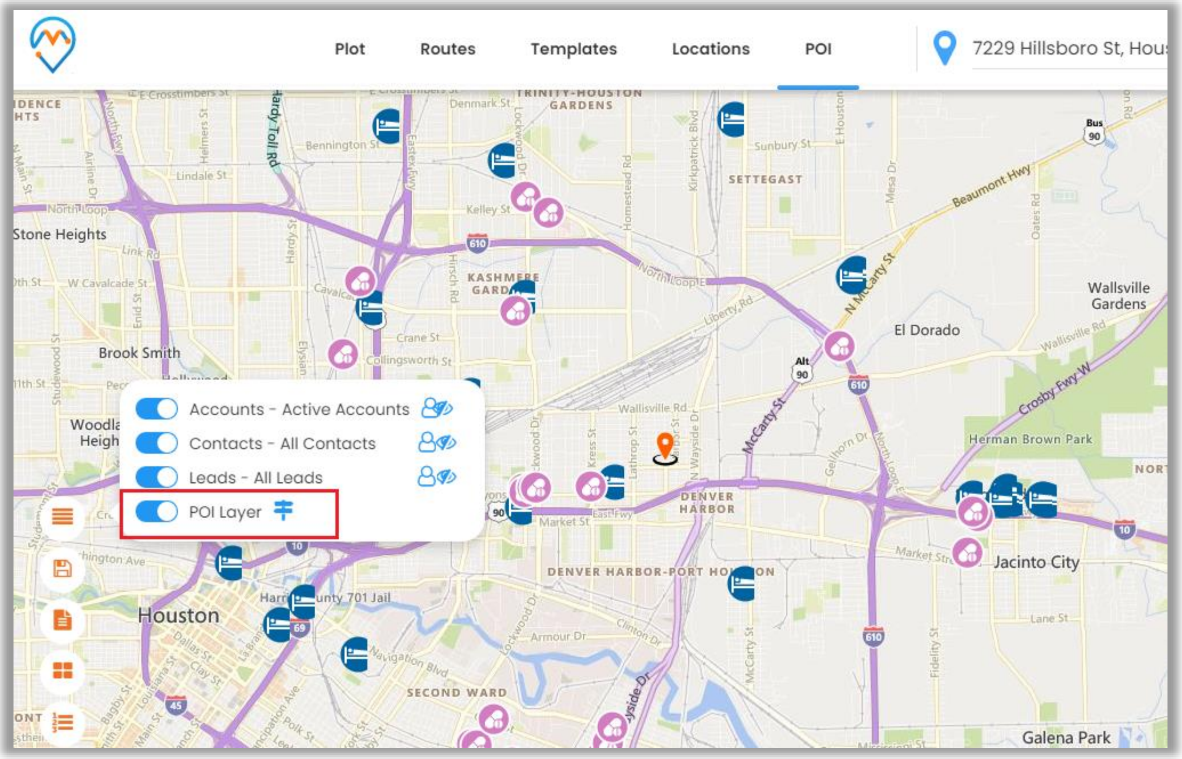
- If you want to search specific locations like restaurant, coffee shops, hotels, airport, gas station, etc. near the plotted records, click on **Point of Interest** tab.
- You must insert the location; the autofill dropdown will appear. You will get the POI location bases on your location.



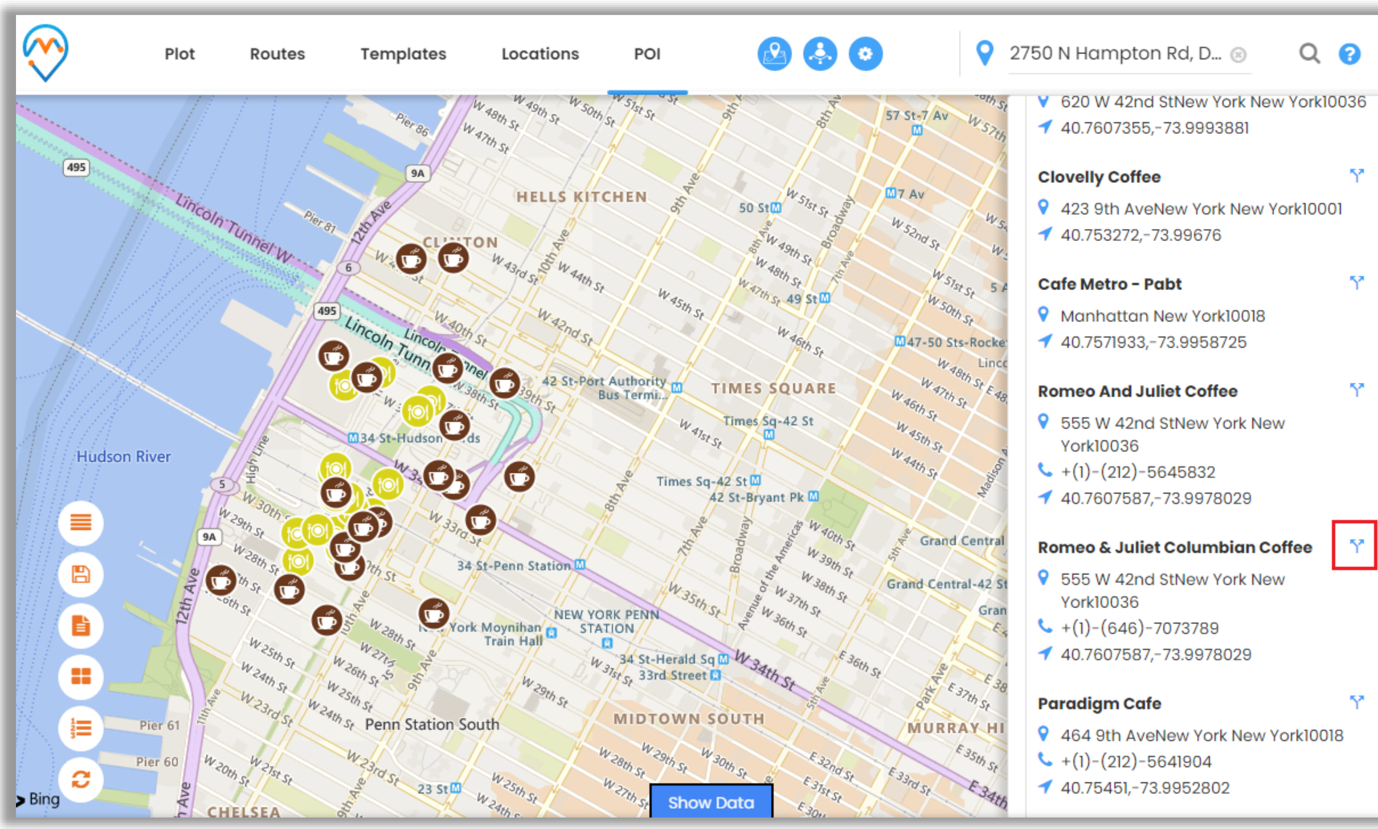
- Under the **POI** tab, select the location/place which you want to search.
- After selecting the POI Location, click on the **GO** button to plot the records of the POI on the map.



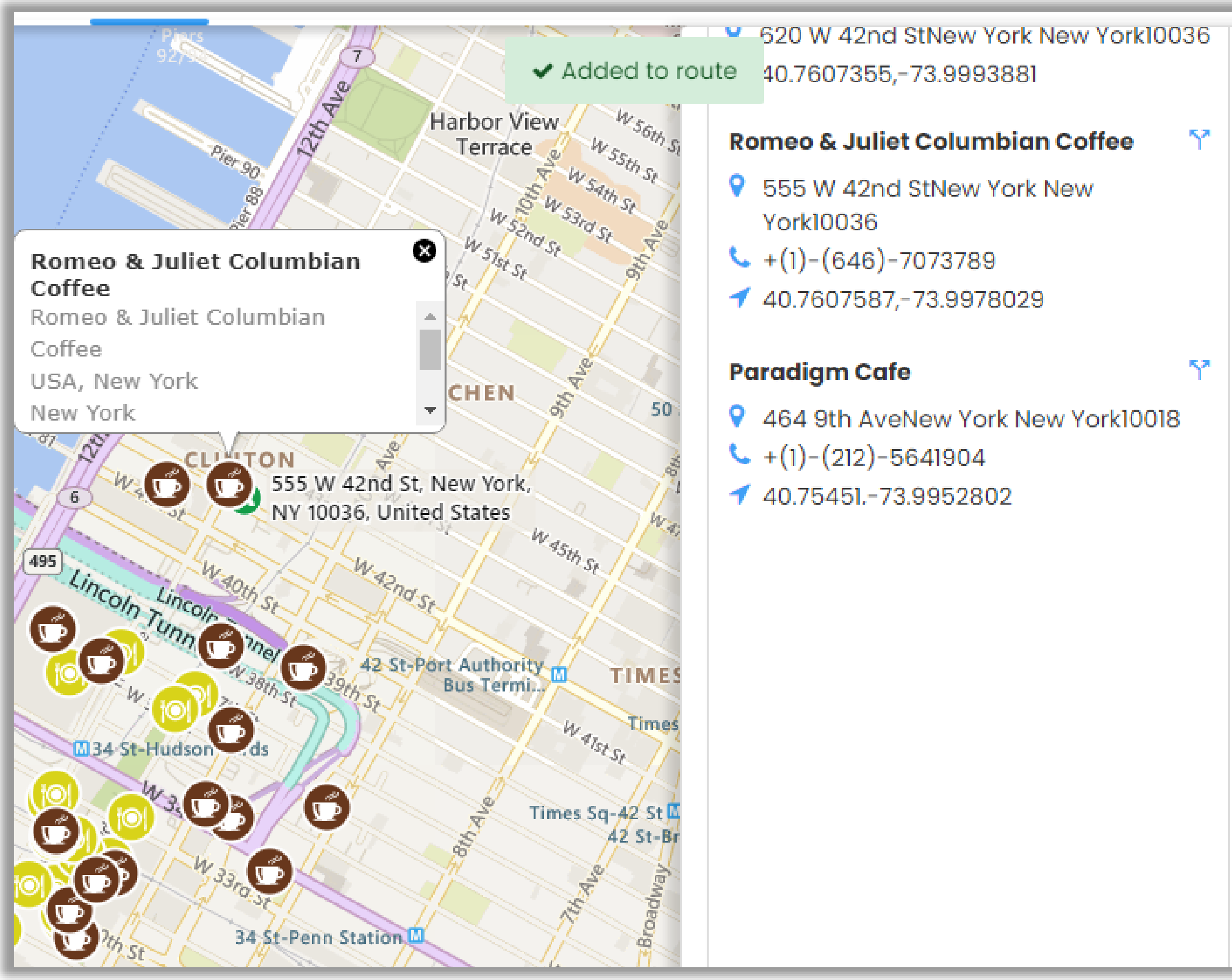
- From the “Layer card”, you will get the **POI Layer** and you can also check the POI locations in detail from the “Details cards” on the right side of the map.



- You can also add any POI Layer record into the **Route (direction)**. From the right side popup window, you will get the ‘Direction’ icon, by clicking on that, the POI record will add to the Route.



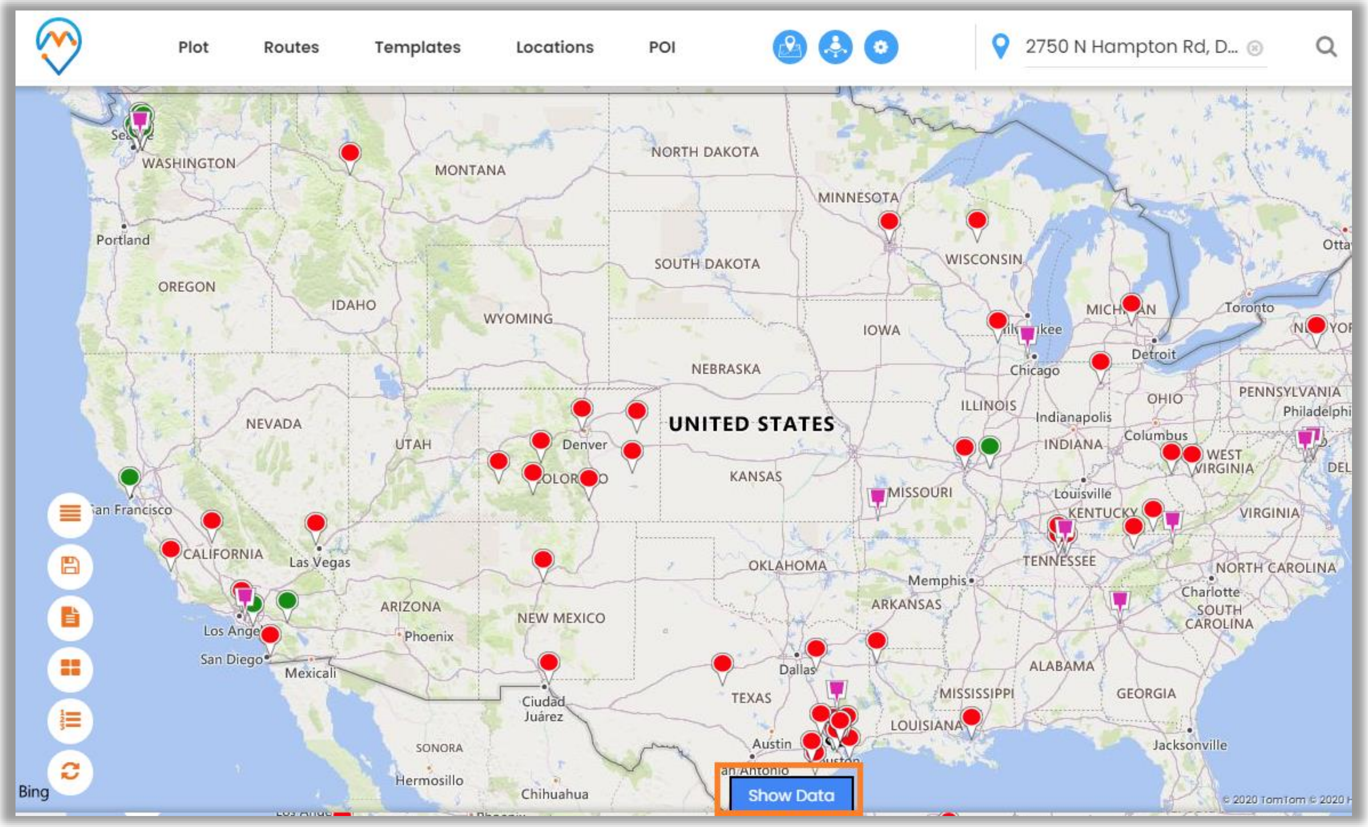
- By clicking on the direction icon, the record will be added into the Route.



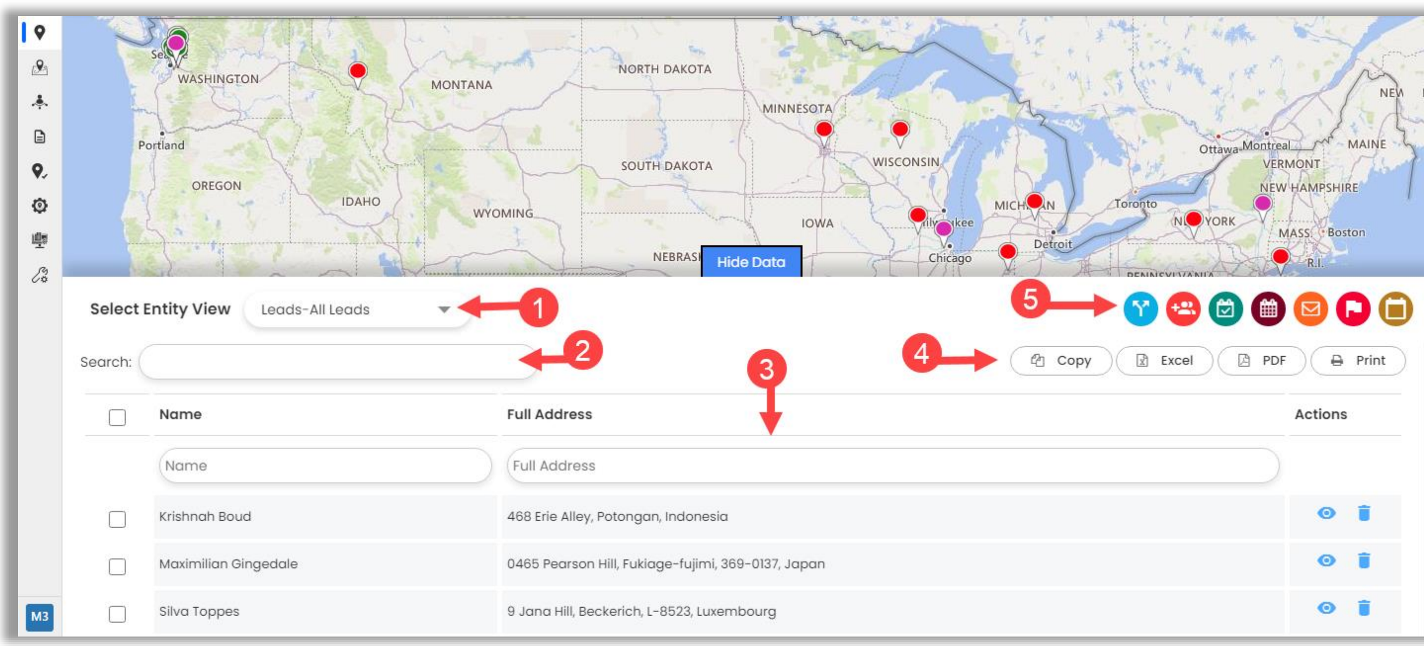
- You can set any POI Layers and set the route to your CRM record.

Data Grid

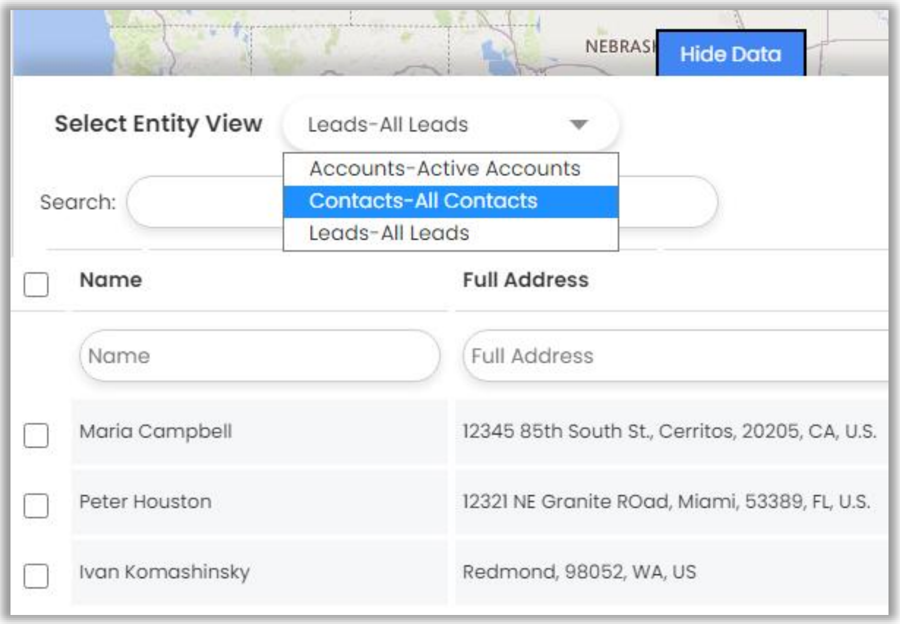
- **Data Grid** provides listing of records which are plotted on the map. You can perform the different actions and manage the records from the Data Grid.
- To view the plotted records in the data grid, click on **Show Data**.



- By clicking on **Show Data**, a slider will open. You can view the plotted data as per selection of Entity. In the dropdown list, you will get only those entities which are selected to plot the record on map



1. You can get the records of a specific entity by selecting the **Entity View**.



2. You can **Search** the records by inserting Name or Address.

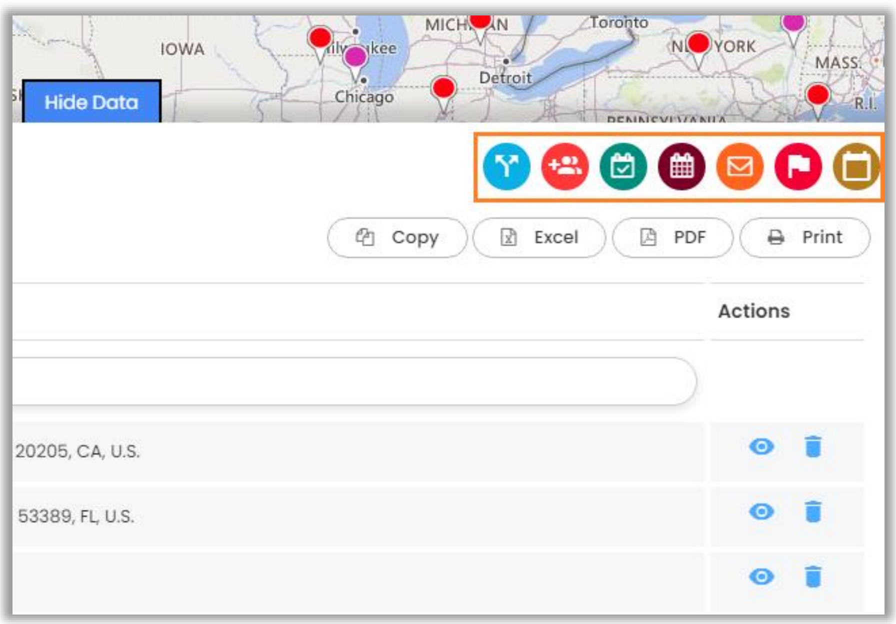
3. The records will display as per the selection of the ‘Entity View’.

4. Copy the records, export the records in a specific file (Excel/PDF) and direct print the records.

5. Perform the different actions by selecting the data grid records:

> Add Record To Route > Change owner > Add Task > Add Appointment

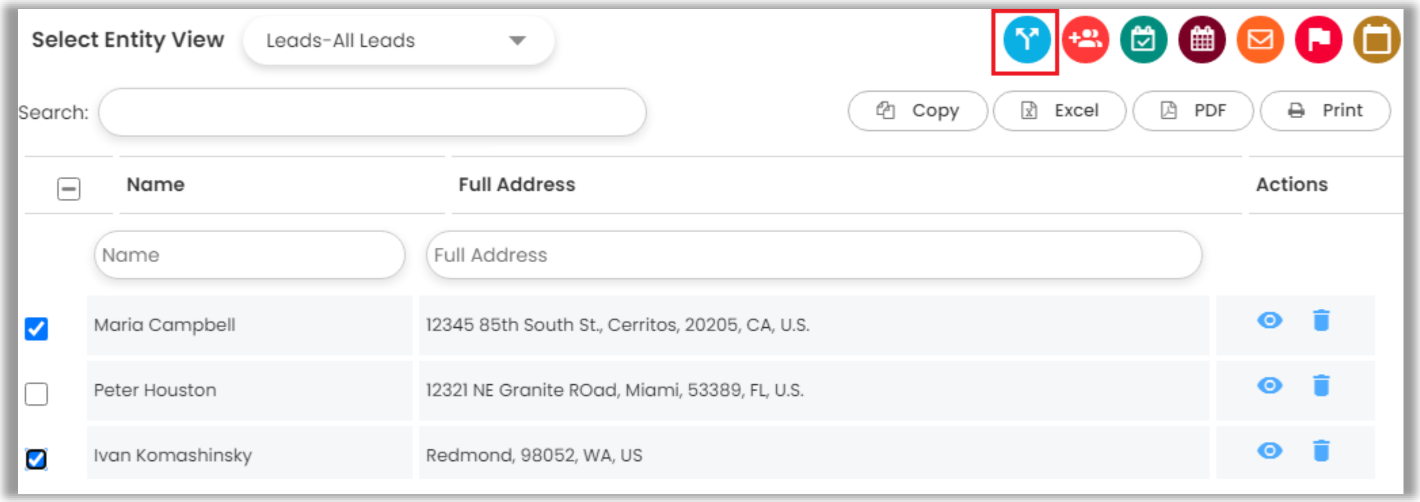
> Send Email > Manage Territory > Schedule Records



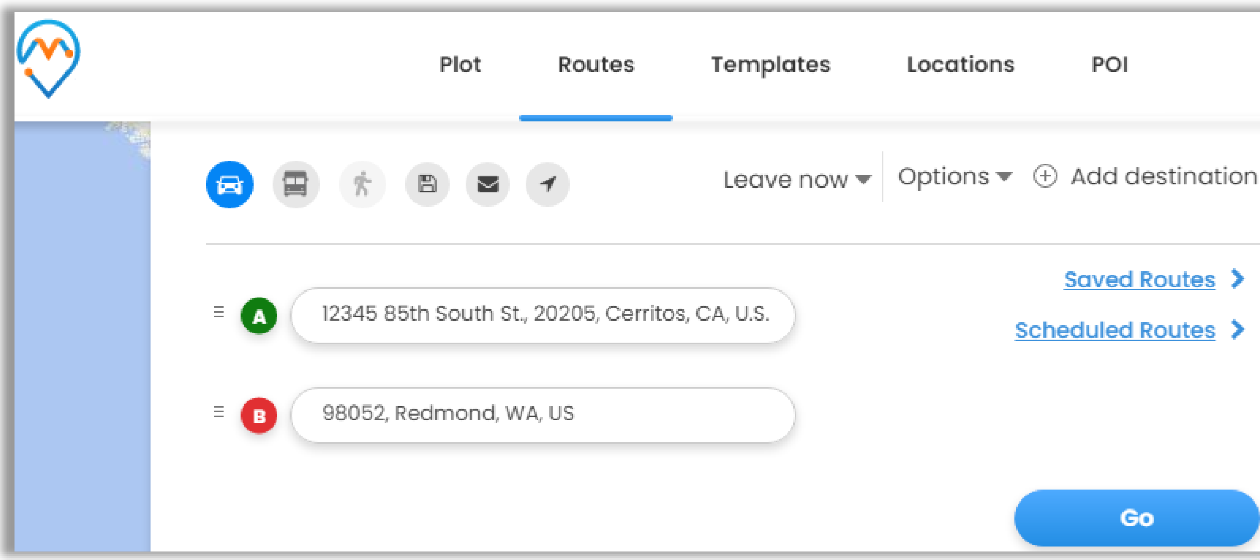
- By clicking on **View** icon, that record will get opened in CRM. By clicking on **Delete** icon, it deletes the respective record from the CRM.
- You can perform actions by **selecting records** within the data grid as shown below:

Add Record to Route

- Select the records and click on the “Add Record to Route” icon to add the records to the route.

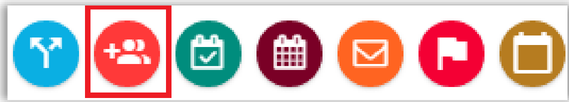


- By clicking on that icon, the ‘Routes’ tab will appear with the selected records of the data grid.
- The locations will be added based on the record selection in Data Grid.

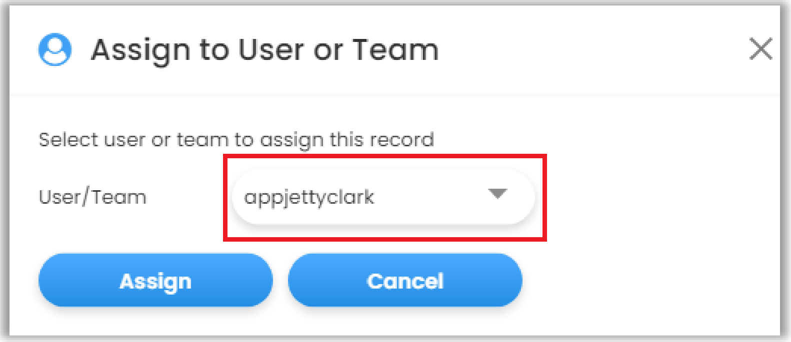


Note: If you proceed to perform any action from data grid without selecting any record, you will get the **Alert** message that will prompt you to select the record.

Assign to User/Team:

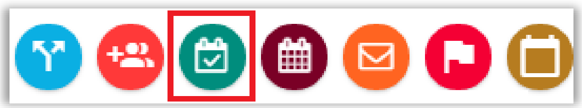


- You can directly assign the selected record to the User / Team.

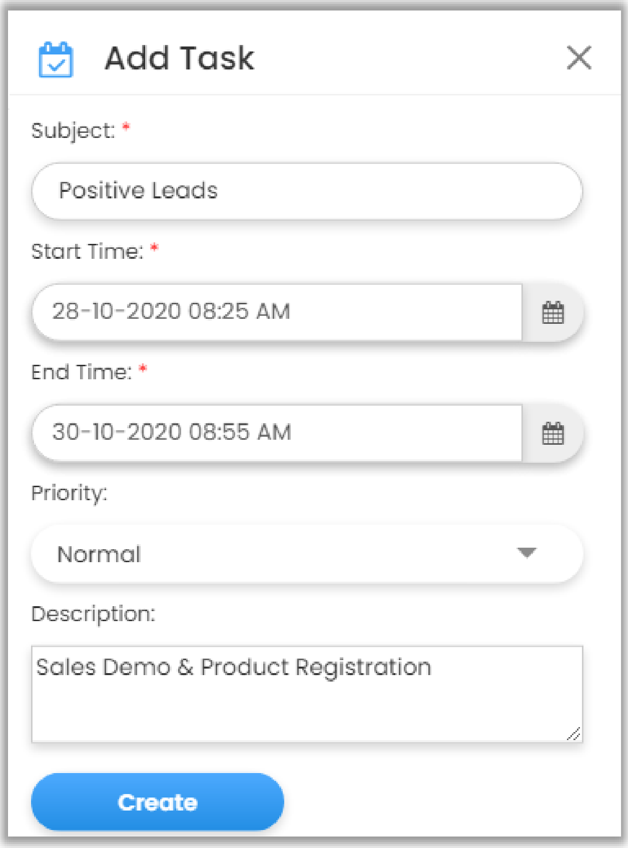


- As you click on that icon, the **Assign to User or Team** popup window will open to select the User/Team.
- After selecting User/Teams, click on **Assign** button.

Add Task:

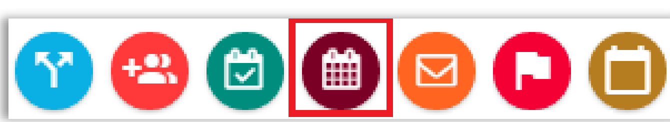


- You can add the Task of selected records by clicking on **Add Task** icon.

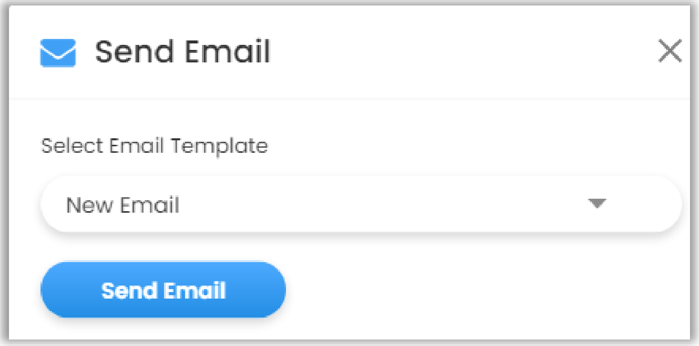


- As you click on that icon, the **Add Task** popup window will open to insert the Task related details.
- After clicking on **Create** button, Task will be added.

- Similarly, you can add the 'Appointment' of selected records by clicking on **Add Appointment** icon.

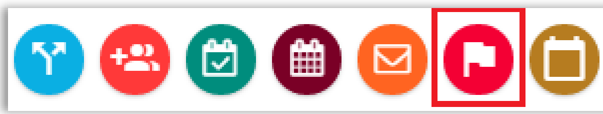


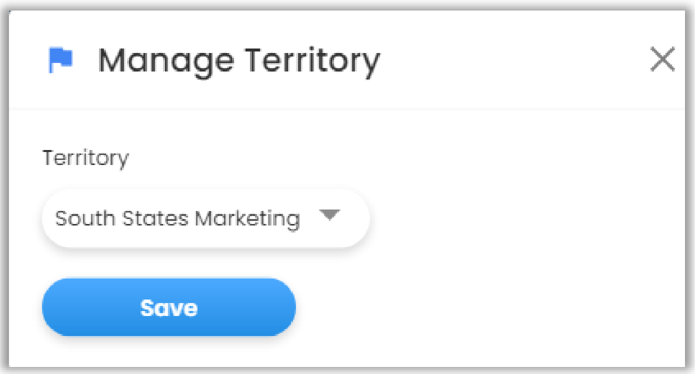
Send Email using Template



- Send **Email** by selecting the records.
- As you click on Email icon, the Send **Email** popup window will open. You need to select the Email Template.
- By selecting an email template, you can send the Email on the email ids of the selected records.
- By clicking on **Send Email** button the email page will be redirected.

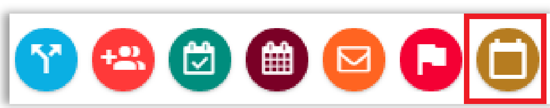
Manage Territory

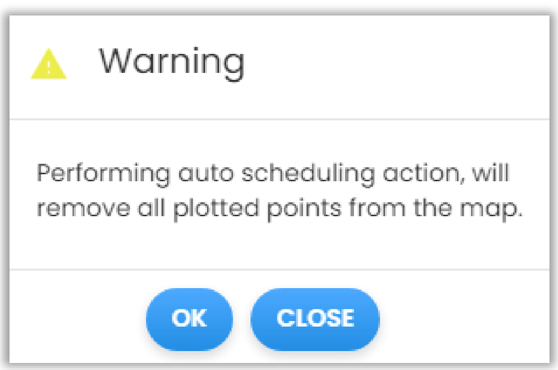




- From the Data Grid, you can add your selected records in the specific Territory.
- As you click on Territory icon, the **Mange Territory** window will open.
- You need to select the Territory and after that click on **Save** button.
- Here you will get the dropdown list of the Territories as per Adding and Managing Territories.

Auto Schedule Records

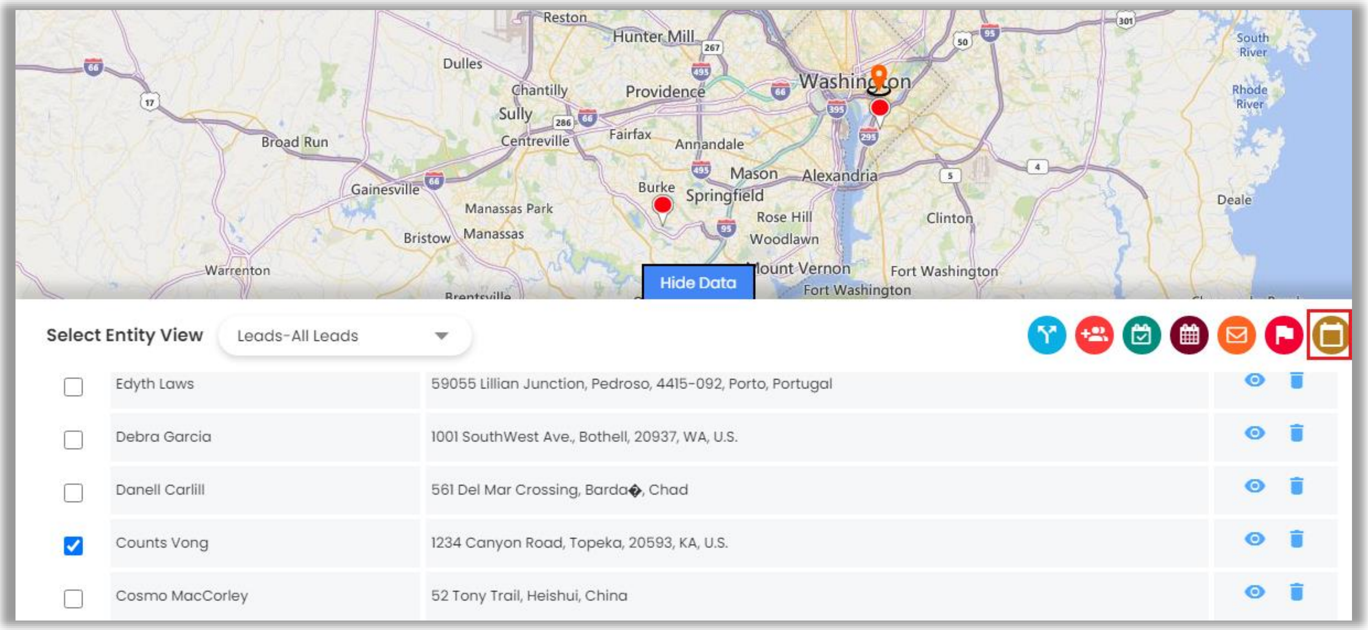


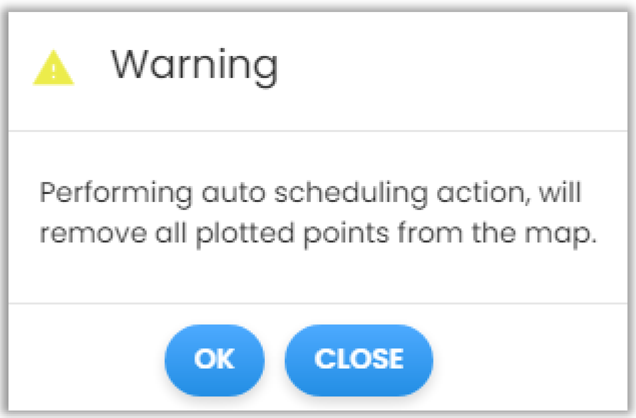


- You can **auto schedule** the selected records by clicking on this icon.
- As you click on it, the warning message will appear that just inform that the plotted records will be cleared on the map.

Auto Schedule Records

- You will find the **Auto Schedule Records** option only from the 'Data Grid'. Select the required data from the Data Grid and click on **Auto Schedule** icon.

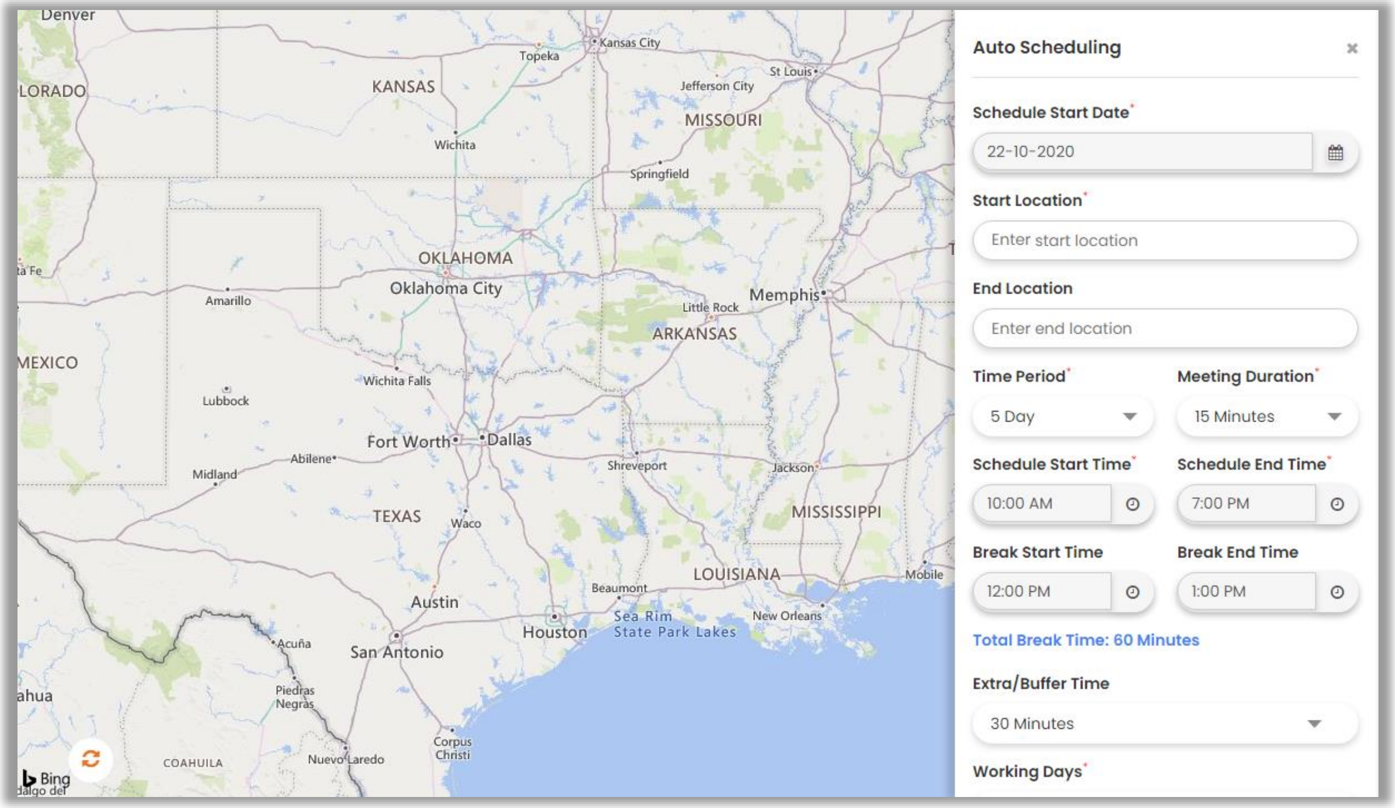


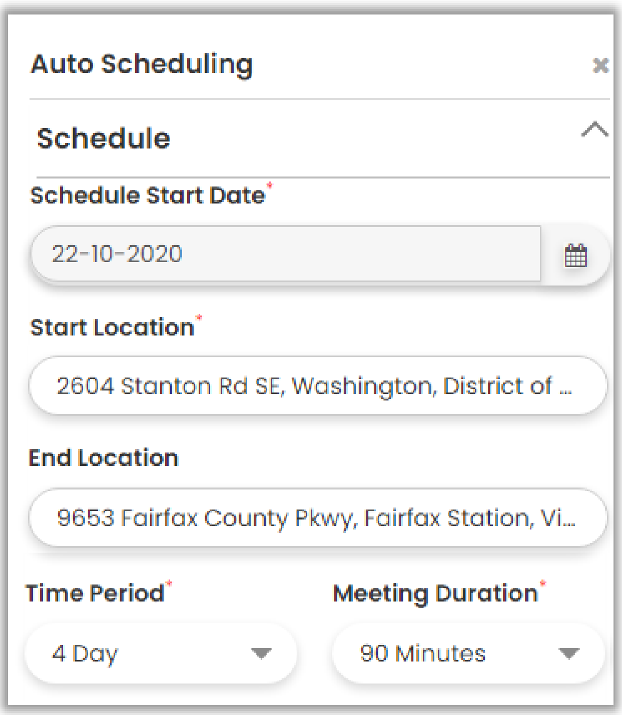


- Once you clicked on **Auto Schedule** icon, you will get a Warning message regarding the removing the plotted records from the map.

- By clicking **OK**, you will be redirected to "Auto Scheduling" slider from the right side.
- In map configuration Auto scheduling configuration will be there according to set values

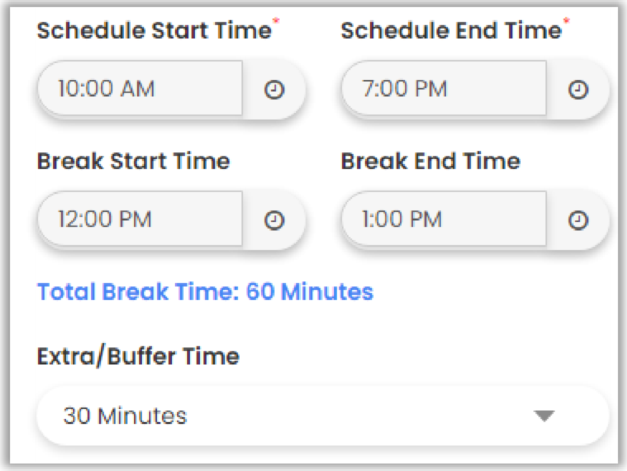
- To create an Auto Scheduling, fill the required data.

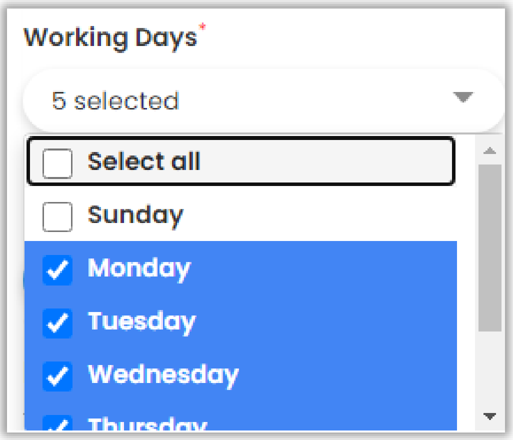




- **Time Period**: Select Time duration, Total working days/week/month. (Mandatory field)
- **Start Location**: Insert your starting location from where you want to start the schedule. (Mandatory field)
- **End Location**: Insert your ending location where your scheduling end.
- **Time Period**: Select day/days for Auto Schedule.
- **Meeting Duration:** Select the time for each plotted record for meeting or appointment.

- **Schedule Start Time**: Select Starting Time of the day.
- **Schedule End Time**: Select Ending Time of the day.
- **Break Start Time**: Select Break Start time in between scheduled time.
- **Break end time**: Select Break End time in between scheduled time.
- **Extra/Buffer Time** : Select time for a day for extra work.

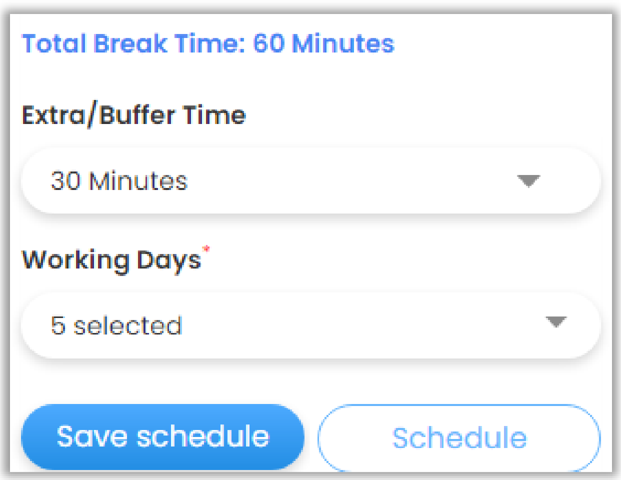




- **Working Days**: Select days for working.

  You will get the date wise schedule as per selection of Time Period and you will get the date wise schedule as per selected days.

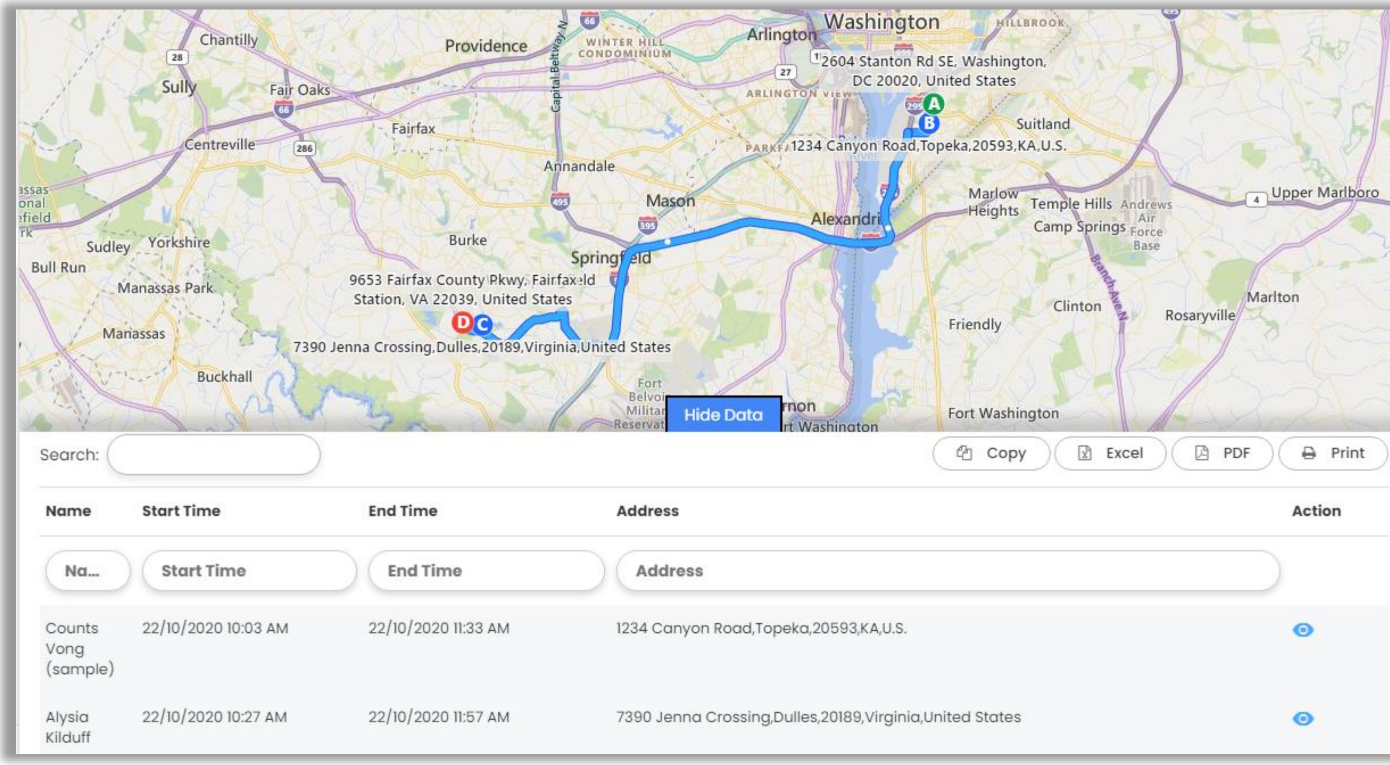
- If your activity is starting from date of 22nd **Oct** (Thu.), Time period is 4 **days** and selected **Days** are: Monday, Tuesday, Thursday, and Friday. You will get the date as per the selection of the days. Wednesday will be skipped.



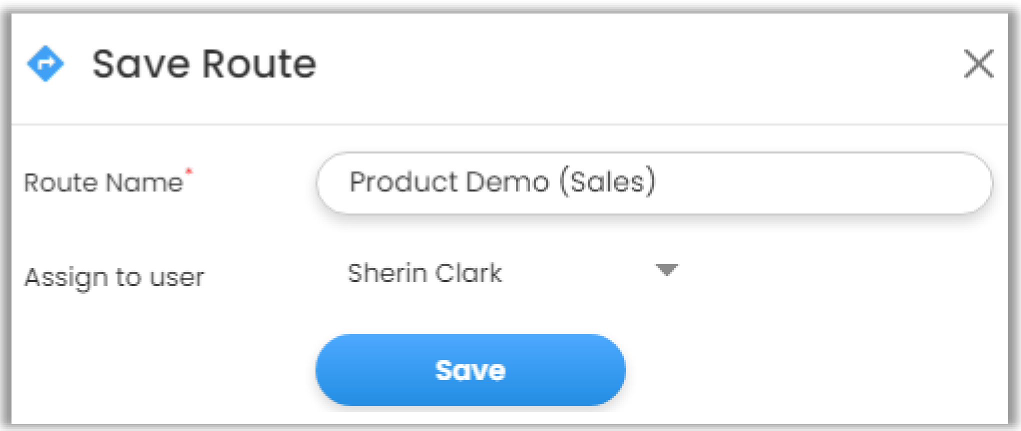
- You can save the schedule by clicking on **Save Schedule**.

- By clicking on the **Schedule**, the Routes will auto schedule on the map.

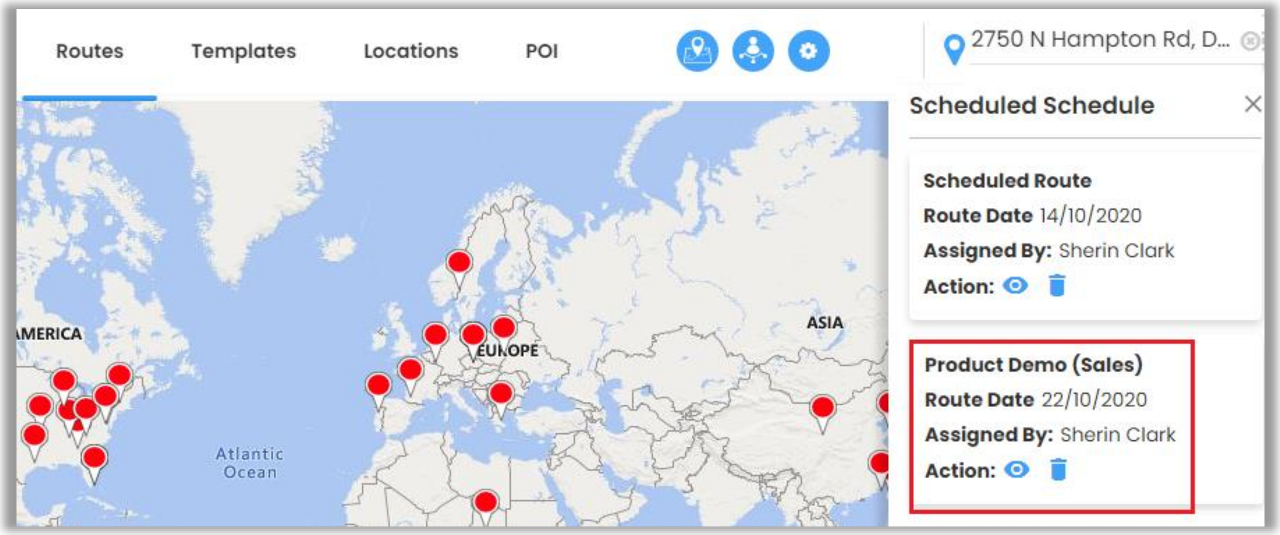
- Here, you will get the direction based on SPF algorithm.



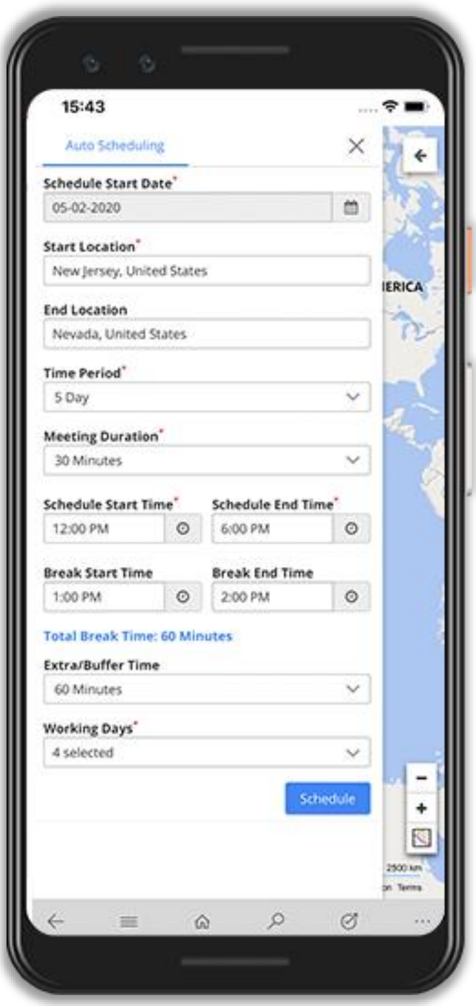
- As you click on Save Schedule button, the **Save Schedule** popup will appear. Enter ‘Route Name’ and ‘assign’ it to user by selecting user from the dropdown.



- You will get the Saved **Scheduled Routes** under the **Direction** tab.



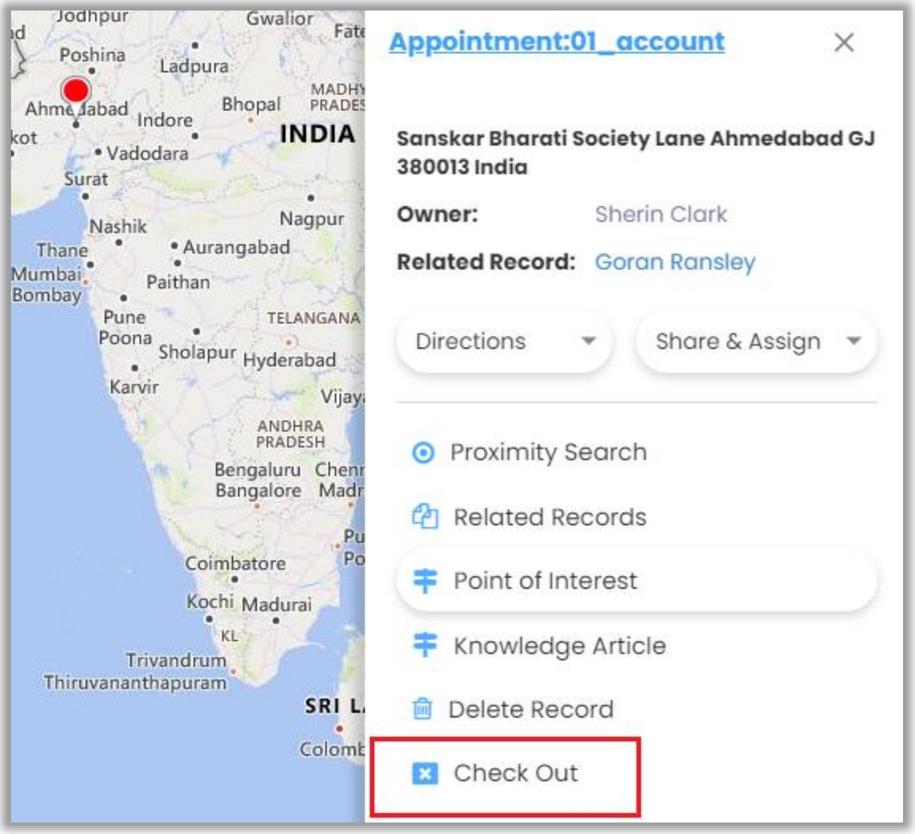
- You can view the Routes by clicking on view icon.



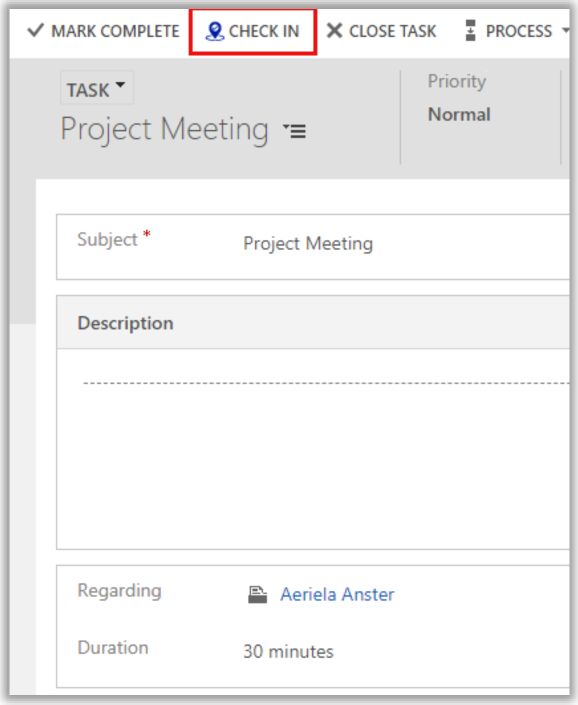
- The Sales reps/executive can easily Auto Schedule any activities, marketing campaign or multiple appointments from own mobile/tab device.

Check-Ins/Check-Outs

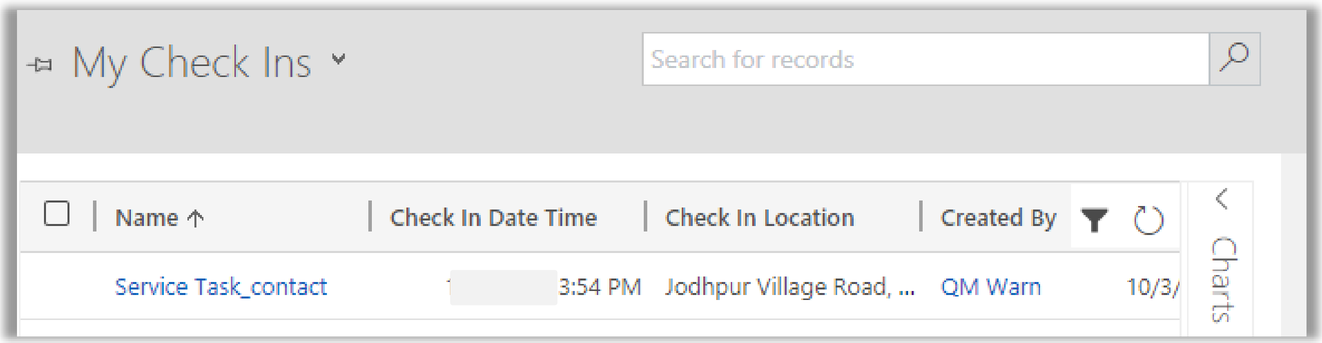
- You can use **check-in** and **check-out** features in all **activity** entities.
- Check-In feature enables admin/user to keep track of exact time spent behind an activity.
- With the help of check in/check out button, you can tag geo-coordinates of the location and time while starting and completing an activity.
    - To perform check in, click on check in icon available on the info card of an activity.



    - Once checked in, it would show action button to check out. User can insert the Notes at the time of Check-Out.
    - User can Check-In *or* Check-Out from the map by clicking on the activity *or* from the detail view of activities by clicking on the title activity name.
    - When CRM Users (team members) check in or checkout any appointment, at that time the mail will be sent to the regarding record owner of that appointment. In the mail the record owner will get the Check-in and/or Checkout details.

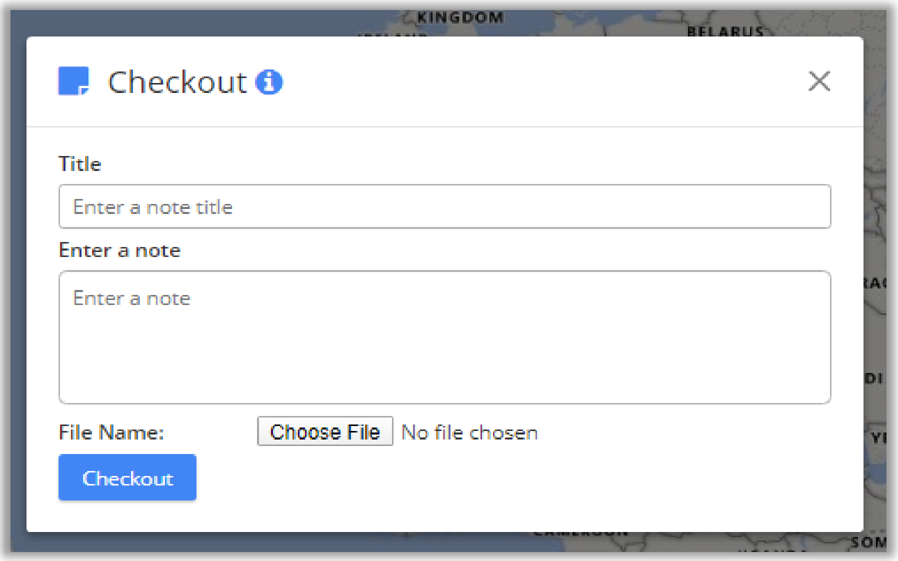


- To check all the Check-Ins record, navigate to **AppJetty tab -> Check Ins**. It will list all the check in records.



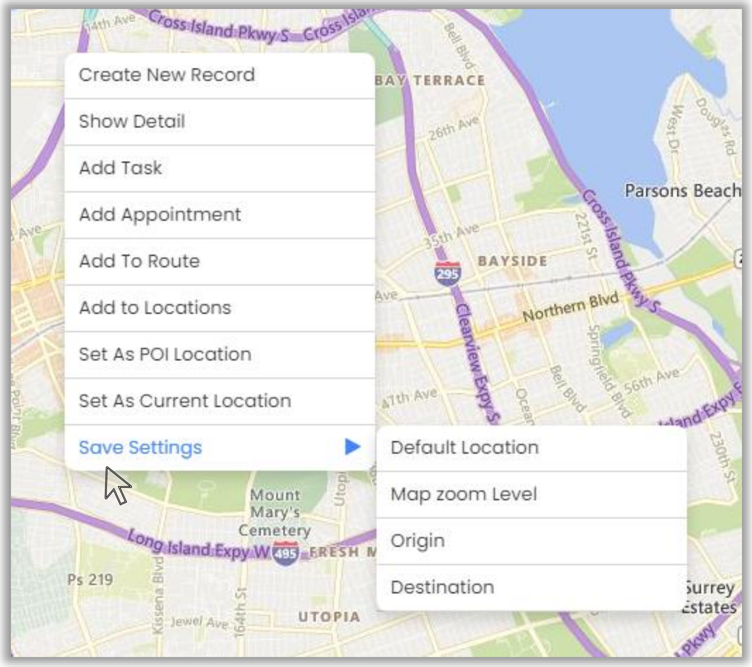
- Check-in takes the address of the record regarding an activity and lets you perform check in only when address is found. The user will only be able to check in if they are in the check in radius as configured by the admin.

- On map as well, you can plot check in entity and its corresponding view to have idea of all check ins.



- User can add note and upload the attachment while checking out from the activity.
- You can check the Notes in the Check-Ins module within the Check-Out view from Note section.
- It will list all possible route and highlight the optimized route. Also, you can get directions based on means of transport like Driving, Walking and Transit. You can also share route in email using link.

Contextual Menu



- ‘Right click’ on to map to open Context Menu.

- It provides options as below:

  > Create New Record > Show Detail > Add Task > Add Appointment > Add to Route

  > Add to Locations > Set as POI Location > Set As Current Location.

  You (or logged in CRMusers) can also set default settings by hovering on **Save Settings** option:

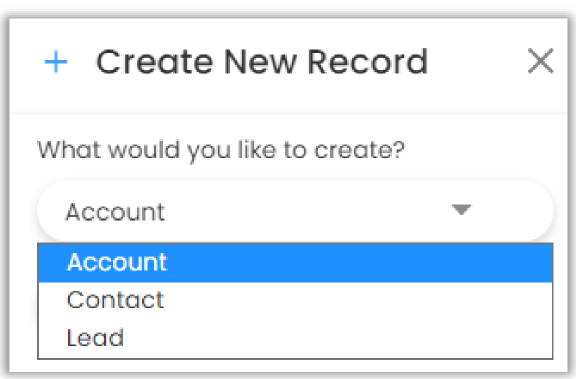
  > Default Location > Map zoom level > Origin > Destination.

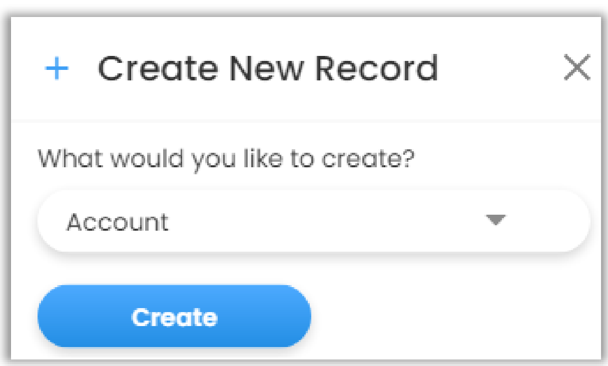
- These settings directly get saved under MappyField 365 Configuration record for logged in user.

- By selecting Create New Record Option, open a dialog box to select record type.

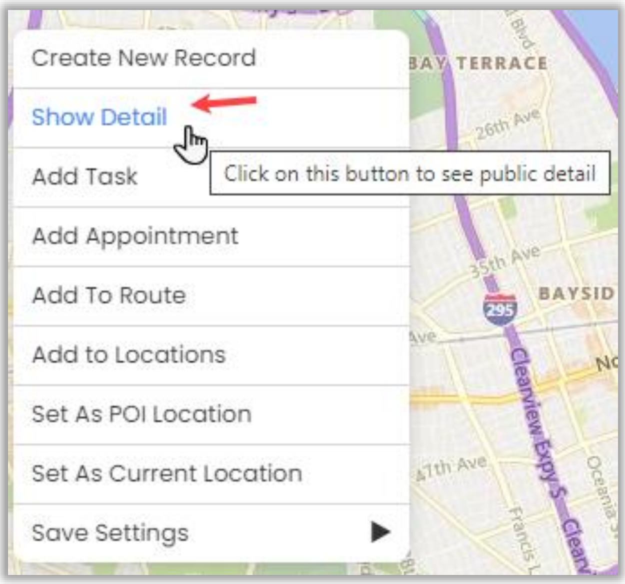
Create New Record

- It can be Account, Contact or Lead. Upon selection of the option, you are redirected to a particular entity page of record creation.



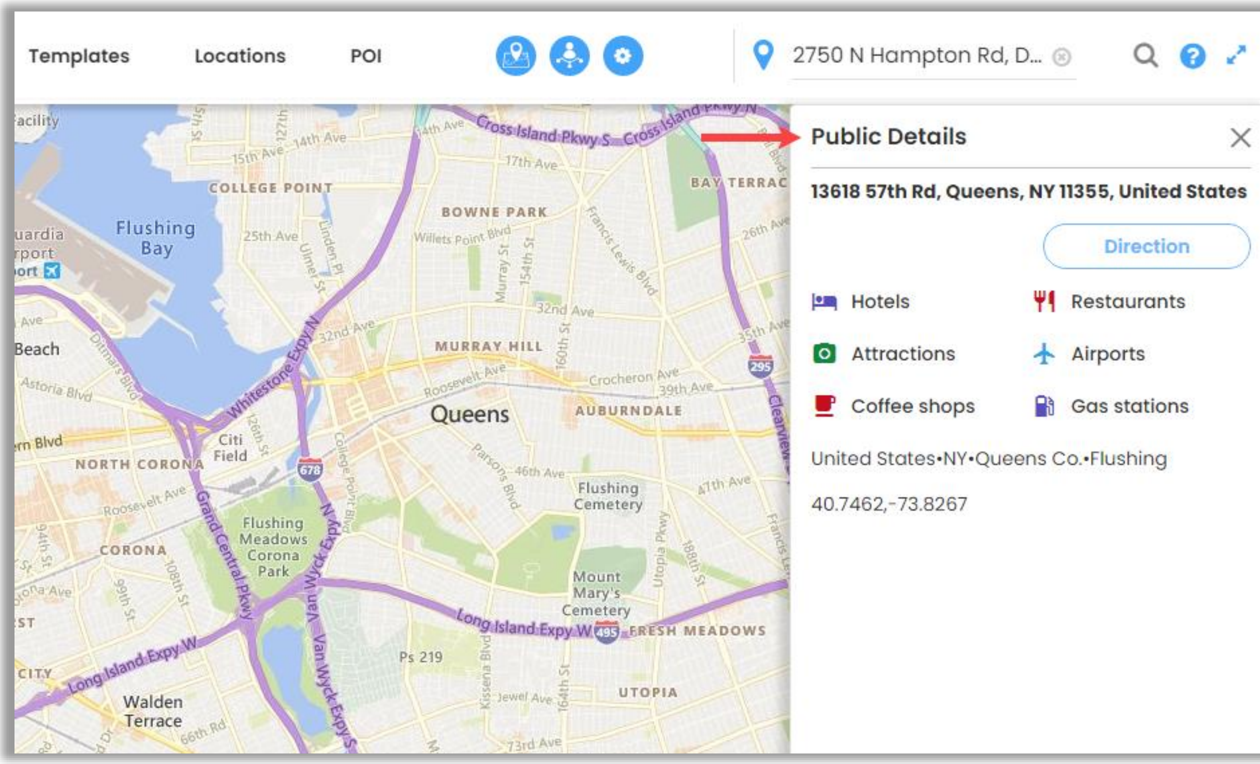


Show Detail

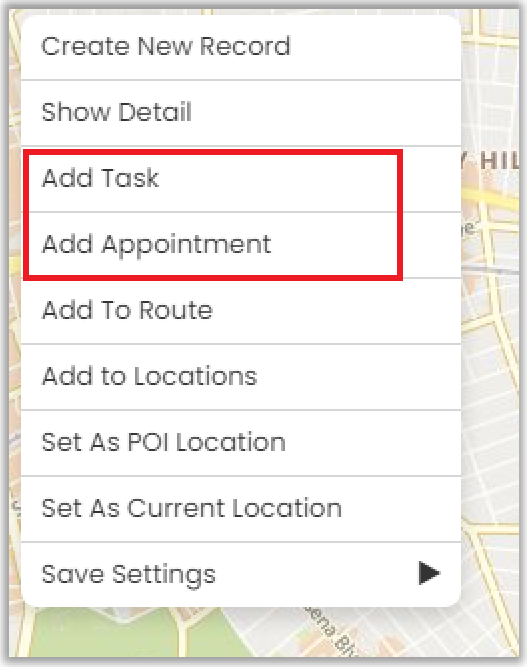


- By clicking on the **Show Detail** option from the Context Menu, you will get the popup window of the 'Public Details' from the right side as per the location.

- You will get the address details of the location. You can search the POI places and get the direction from the selected location.

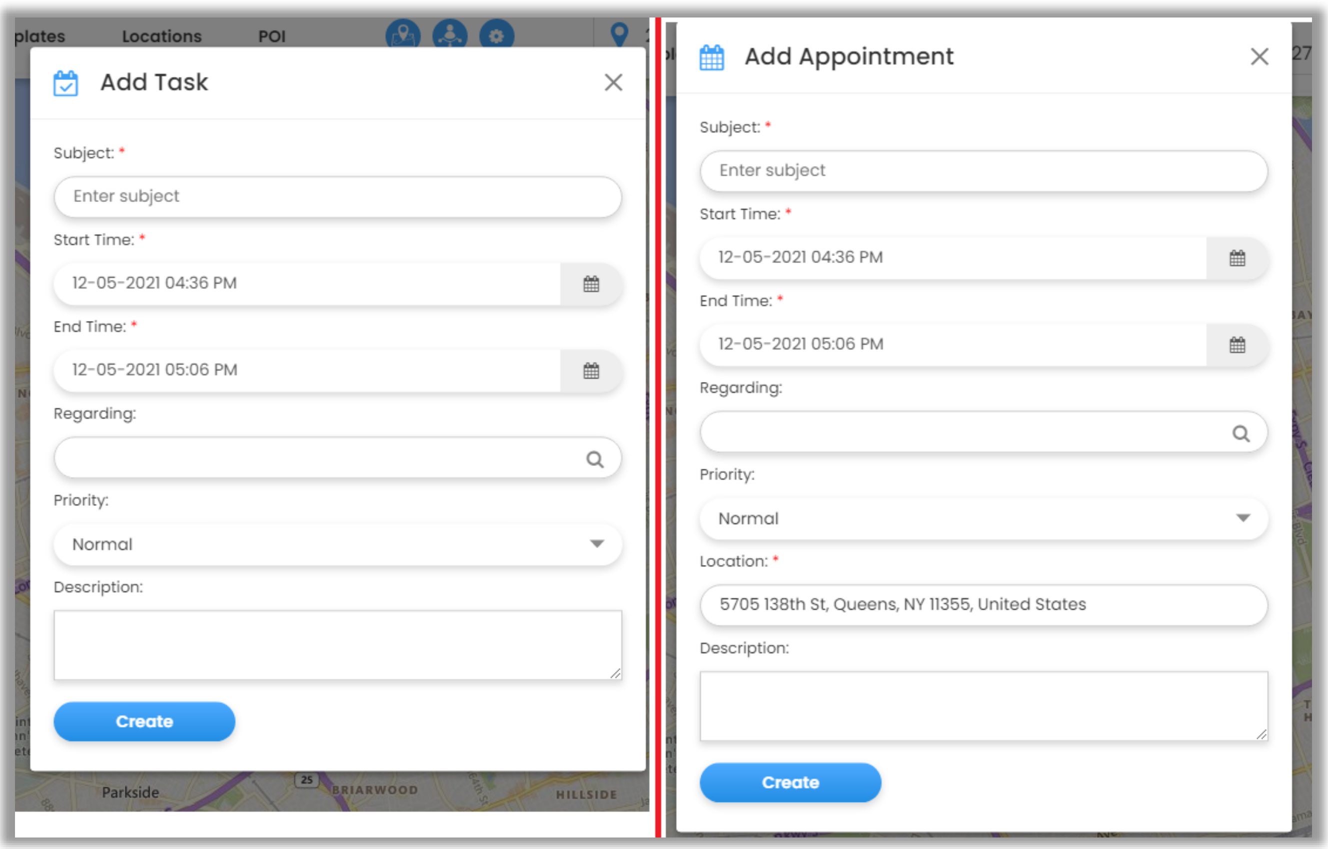


Add Task/Appointment



- From the Context Menu, you can directly add a **Task** and an **Appointment**.

- By clicking on the Add Task *or* the Add Appointment, the popup will appear to select the required details to add Task or Appointment.



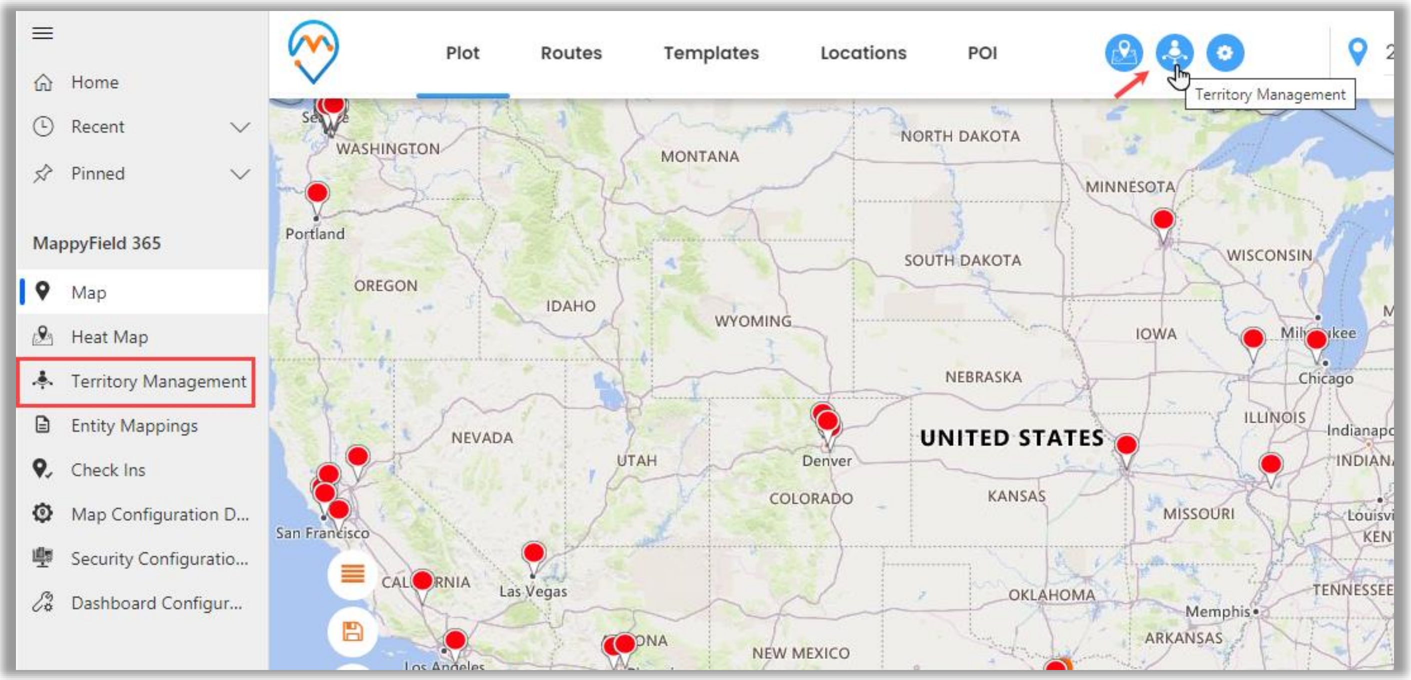
- Similarly, you can perform the actions for other options from the Context Menu.

Territory Management

- Create the new territories or manage existing territories to define regional/area based activities from the Map.
- You can plot regions on map based on files, by location of regions, and by drawing. Based on plotted regions, you can use the Alignment tool to select the required regions and create new territories. Also, you can plot the existing territories and copy or move them as required.
- You will have two options to access the **Heat Map**:

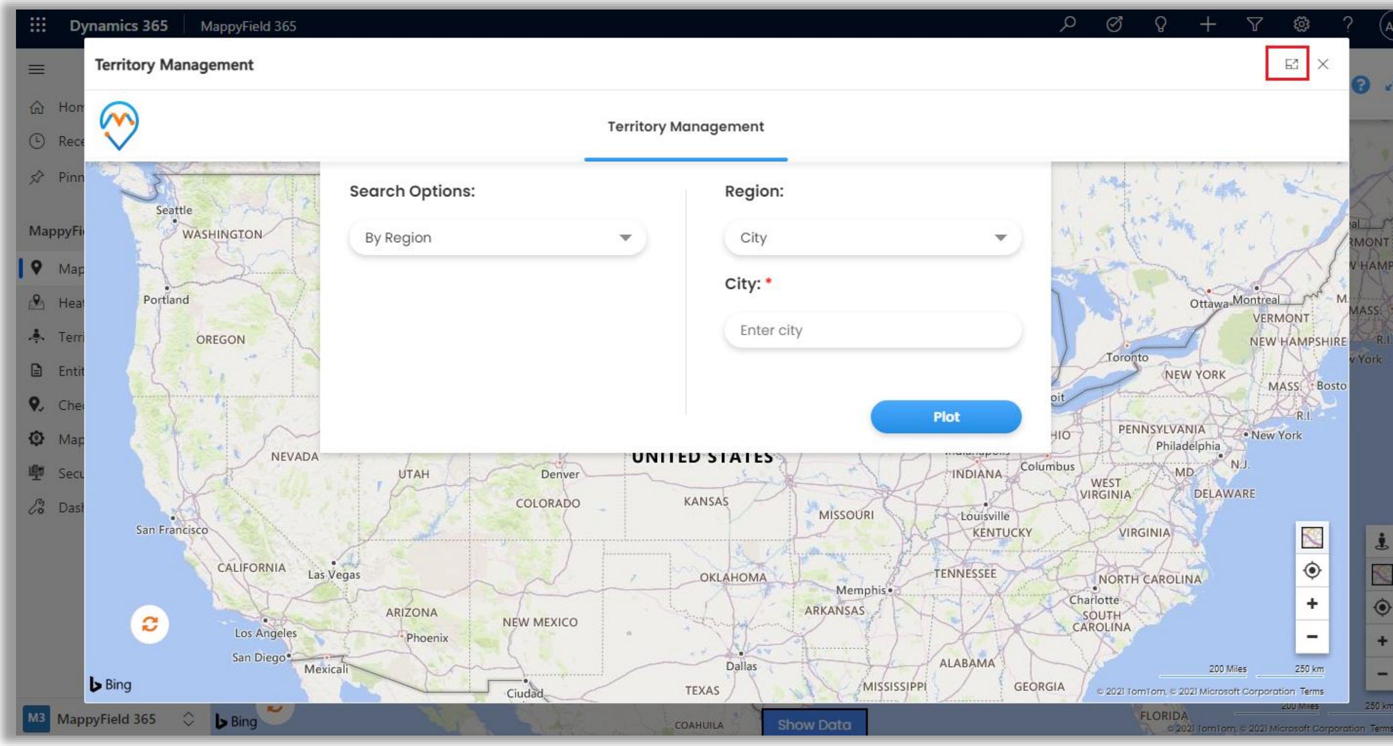
  -> A quick access option from the Map itself.

  -> Individual Territory Management from the MappyField 365 navigation pane on the left side.

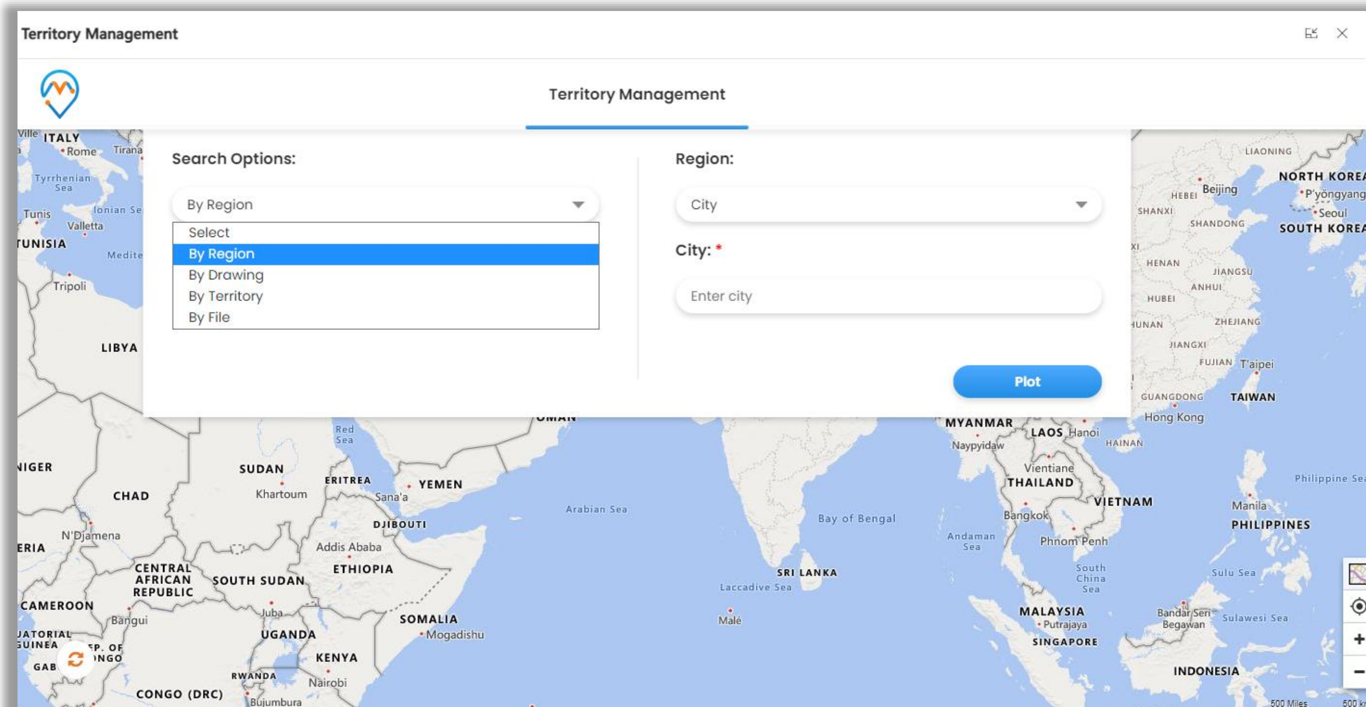


Quick Access Territory Management

- You will find the Heat map 'Quick' access option besides the Menu of the MappyField 365.

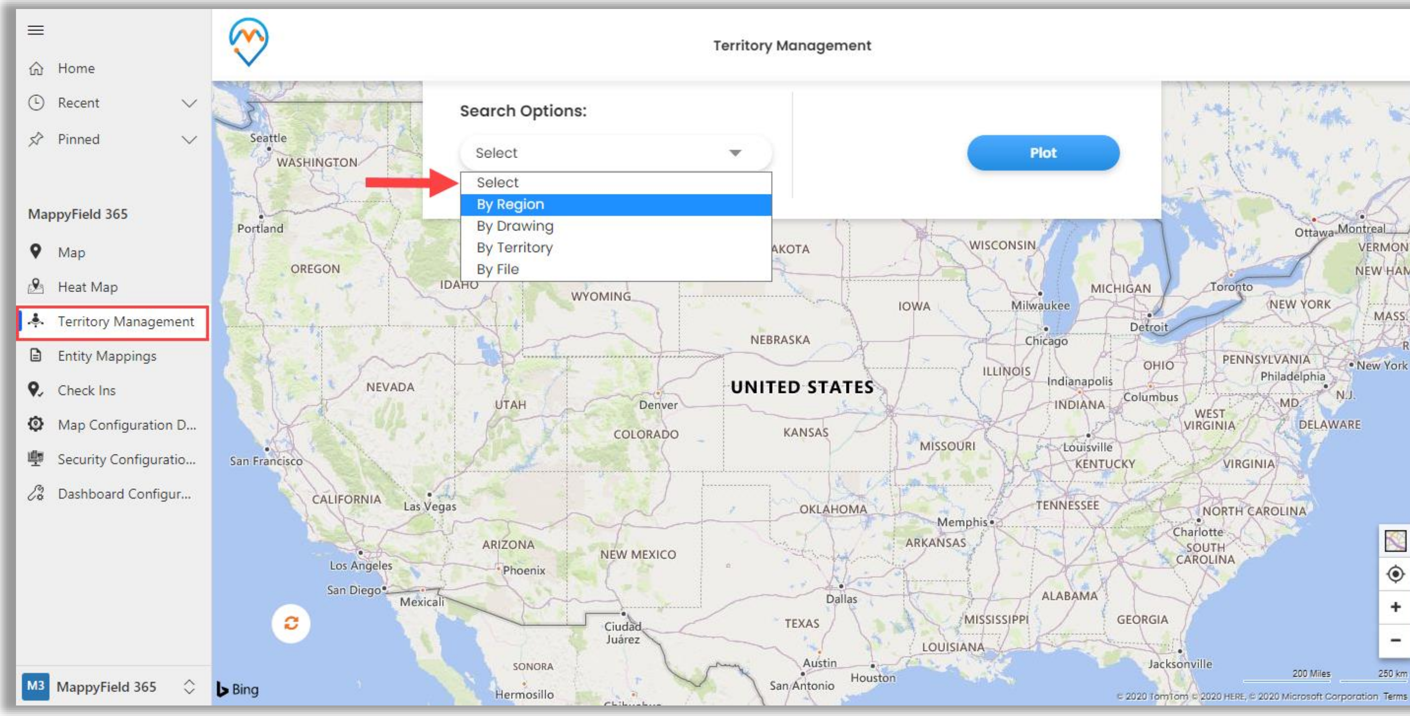


- By clicking on the 'Territory Management' icon, a Territory Management will open as Quick access view. From here you can create territory & manage it.
- You can enter the Territory Management in the Full screen by clicking on 'Full view' icon besides close **x** icon.

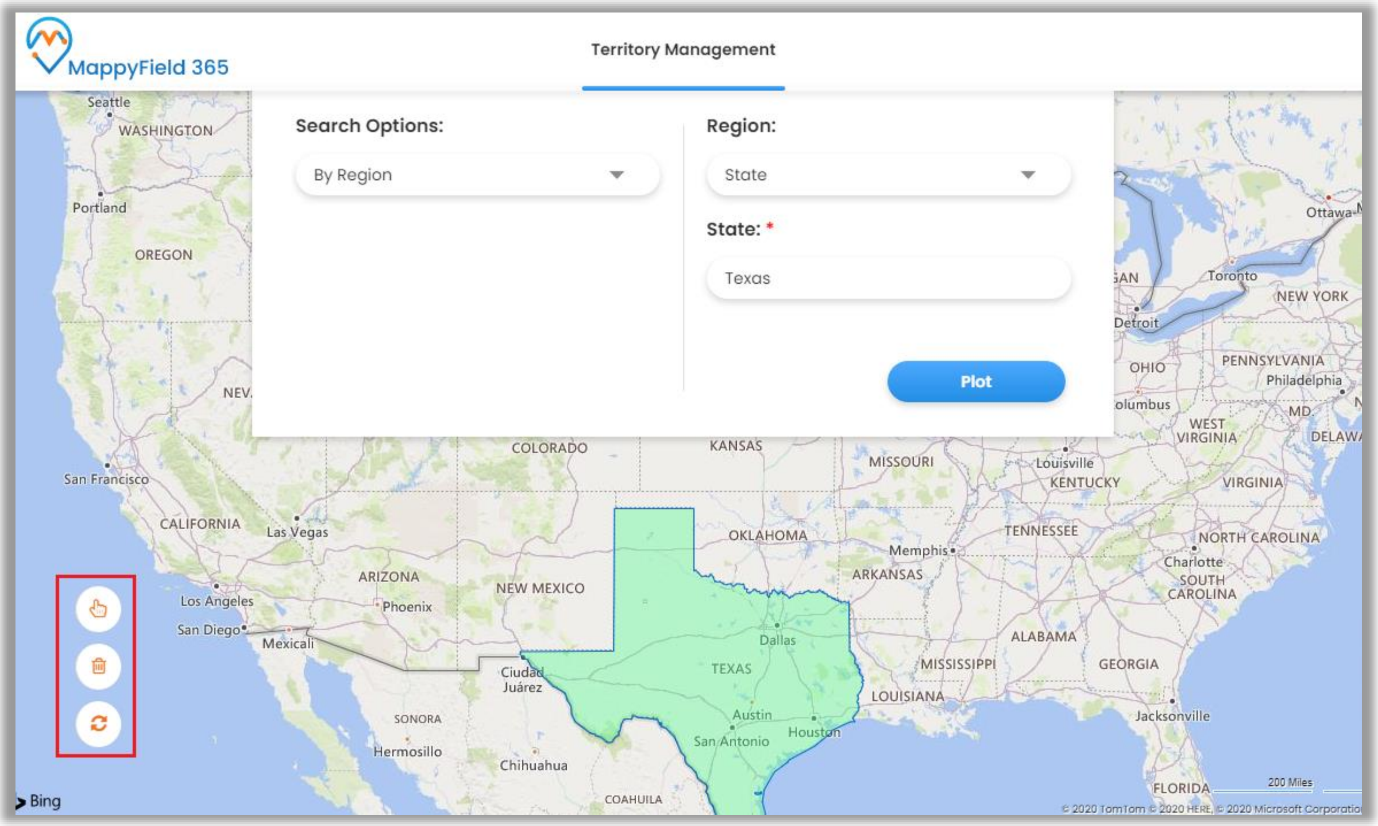


Territory Management

- To perform territory management, click on the **Territory Management** from the MappyField 365 navigation pane.

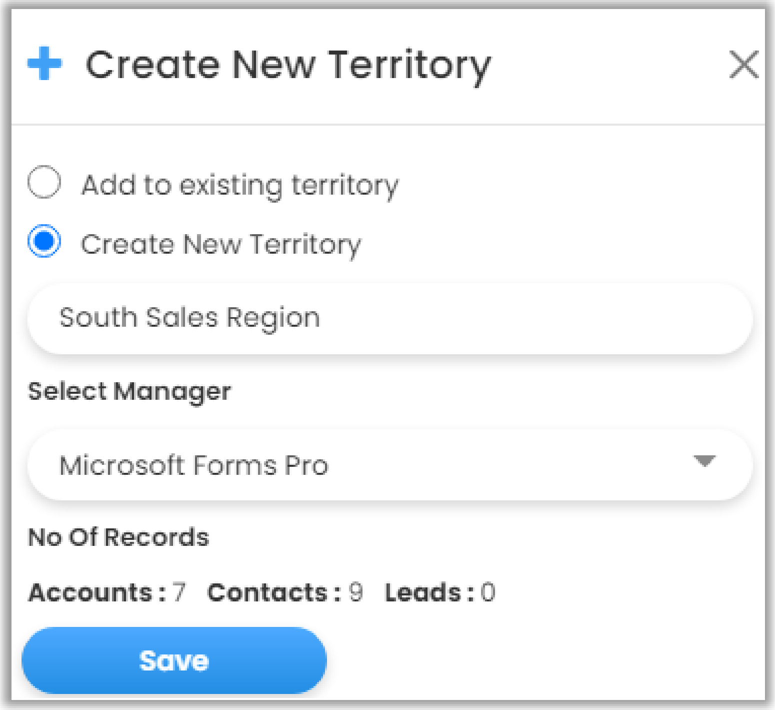


- Different search options available are **By Region, By Drawing, By Territory, By File**.
    - **By Region**: This option helps users to search for regions on the map i.e. City, State, Country and Postal Code.
    - **By Drawing**: This lets you draw a shape using custom drawing tool:
      Union, Union Aggregate, Difference, Intersection, Disjunctive Union. You can perform the actions like: Undo, Reset and After performing shape operation user can create new territory of that resulted shape.
    - **By Territory**: Using this option, you can plot existing territories on the map.
    - **By File**: This option helps in plotting shape files. Supported file types are .shp, .kml, and .geojson. You can also upload the CSV file of any region/location to create and manage the Territory.

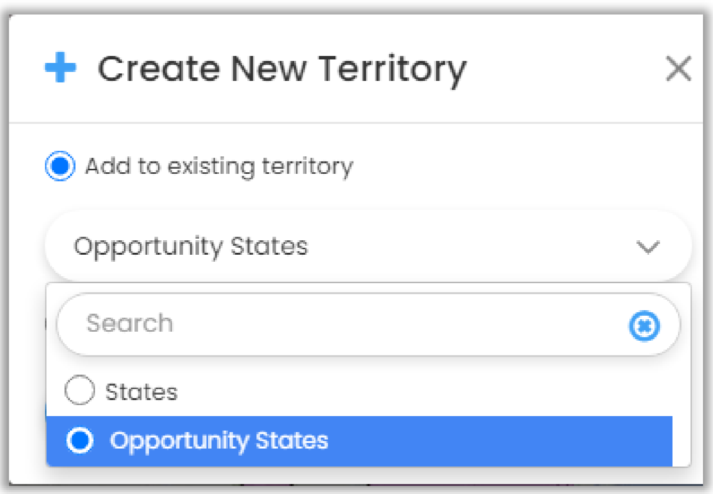


- After plotting, using territory alignment tool, you can select/deselect territories as required on the map. Using alignment tool, you can select/deselect, remove selection or refresh the map.

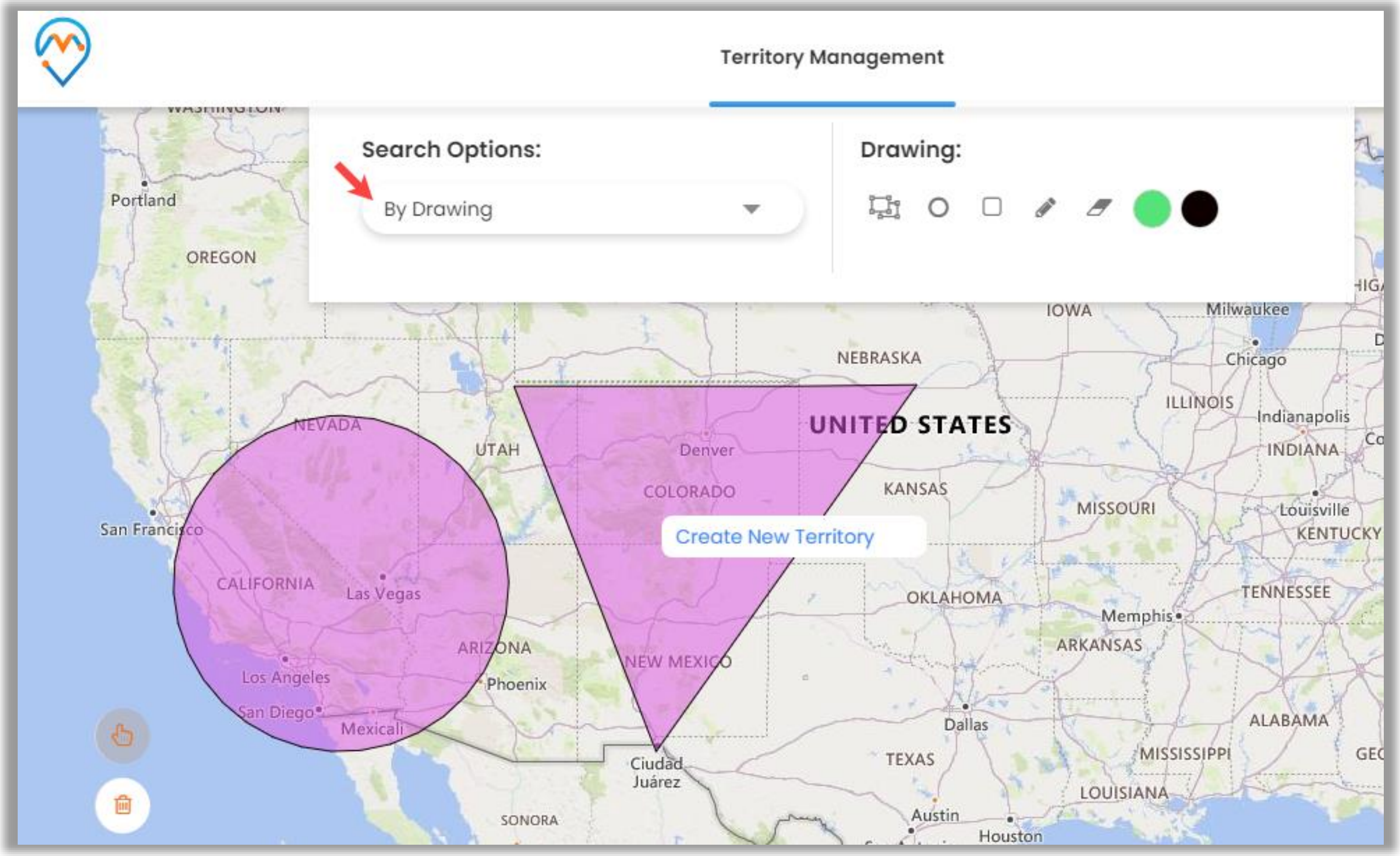
- **Create New Territory**: Select region/shape and right clicking on selected region, it would show option to create new territory. Clicking on **Create New Territory** would open a dialog box to enter territory name and select manager for a territory.
  Here you will get the statics of the Accounts, Contacts & Leads under the No of Records.



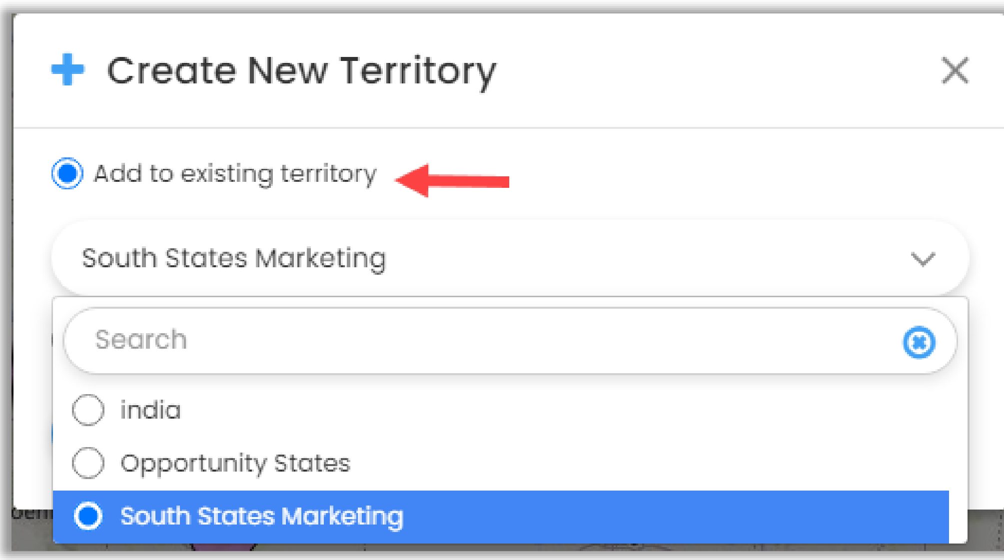
- **Add to existing territory**: You can also choose to add the new territory within existing territory by selecting **Add to existing territory** option. After inserting new territory or selecting the existing one, click on **Save** button.



- You can also create and manage the Territory using **By Drawing** Option.

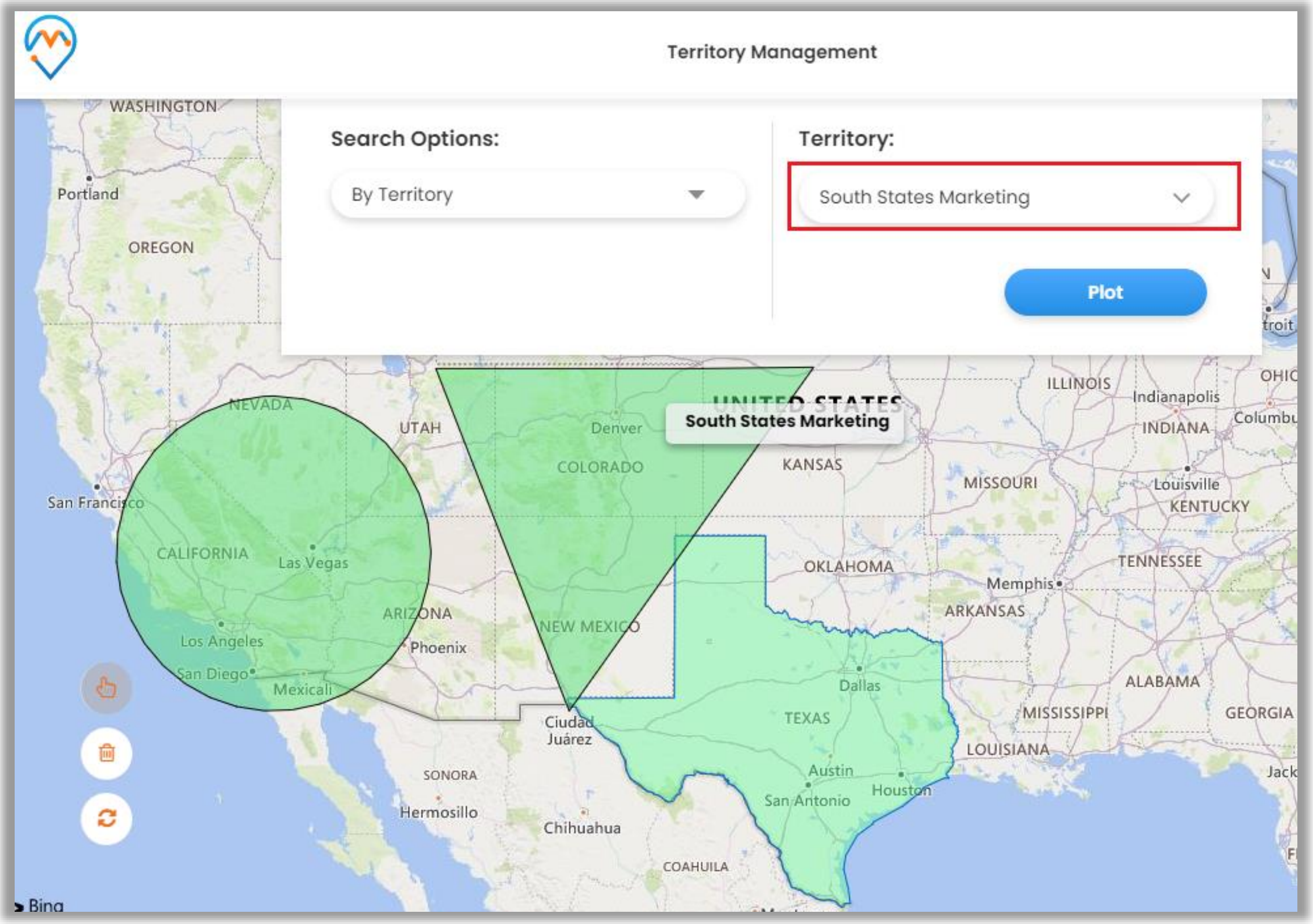


- You can add a new territory by clicking on the 'Create New Territory' or you can add to existing territory by selecting 'Add to existing territory' option. After inserting new territory or selecting the existing one, click on **Save** button.

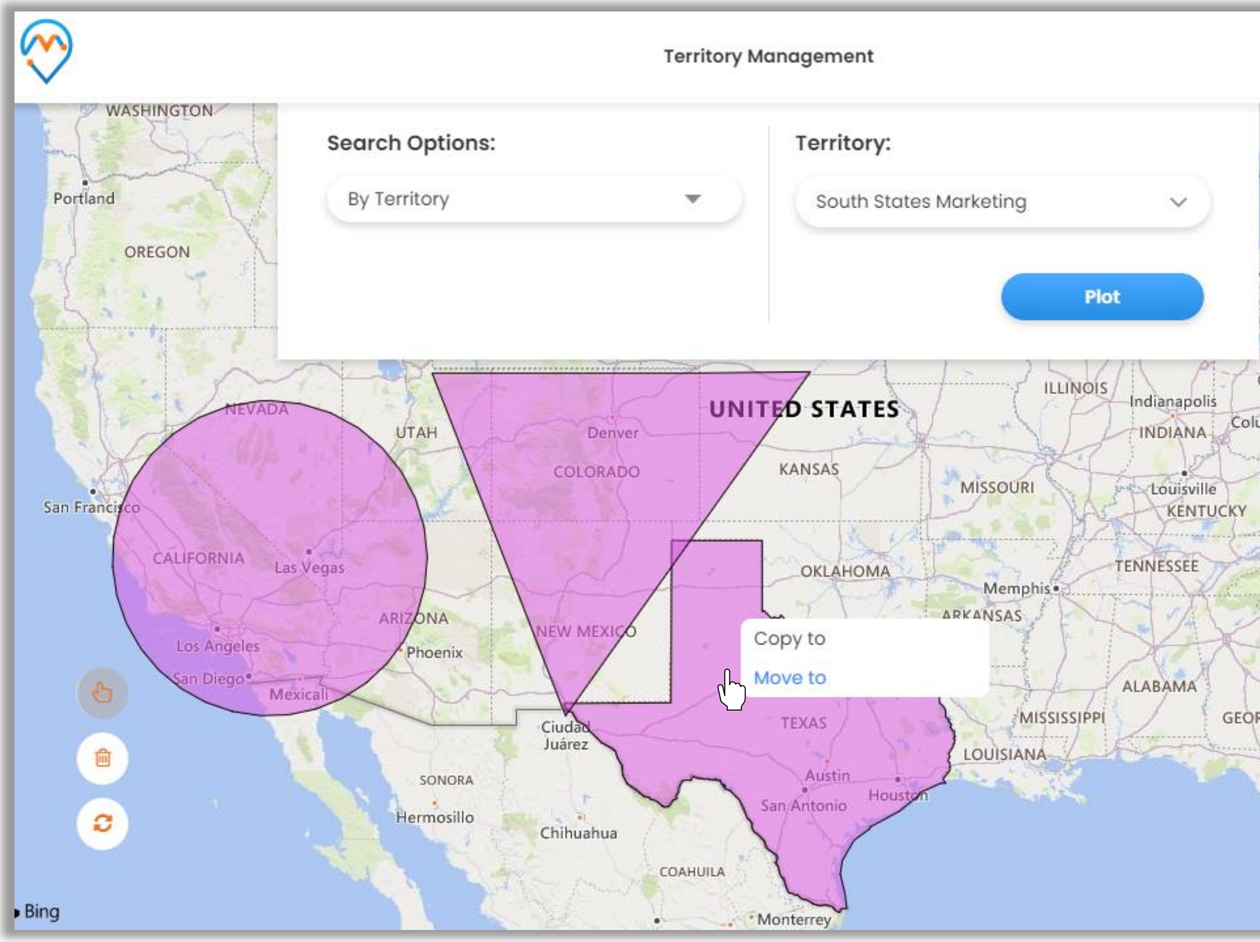


Copy Or Move Territory

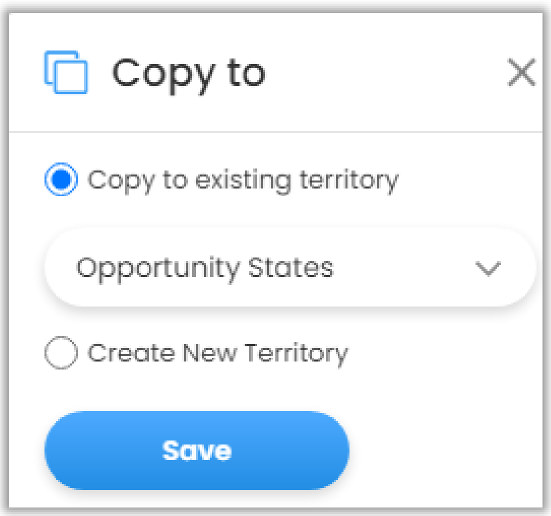
- You can also manage the existing territory by copying or moving to another of any search options.

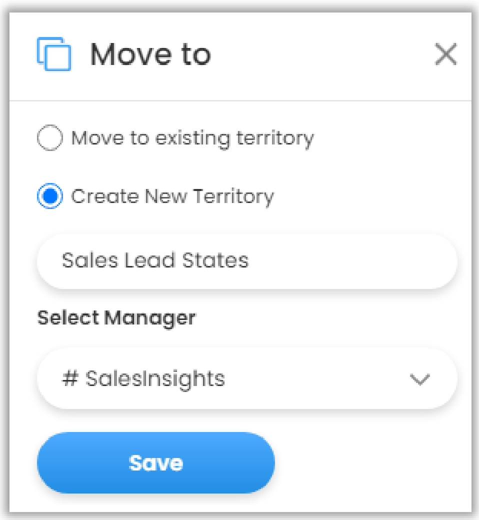


- **Copy/Move Territory:** Right clicking on selected region/shape that is an existing territory, it would show option to copy or move territory.



- Clicking on **Copy to/Move to** would open a dialog box to select if territory must be copied/moved to an existing territory or create a new one.

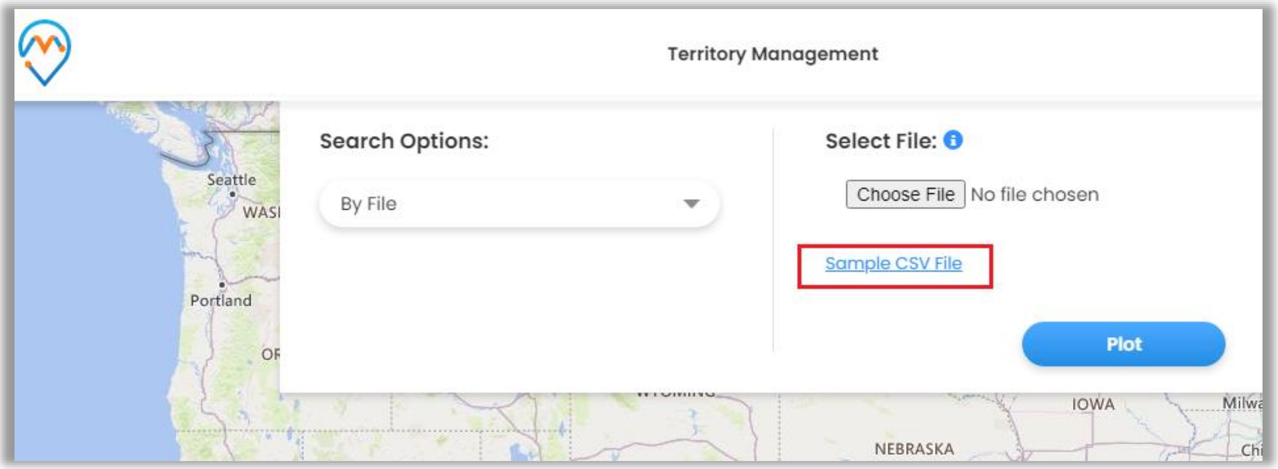




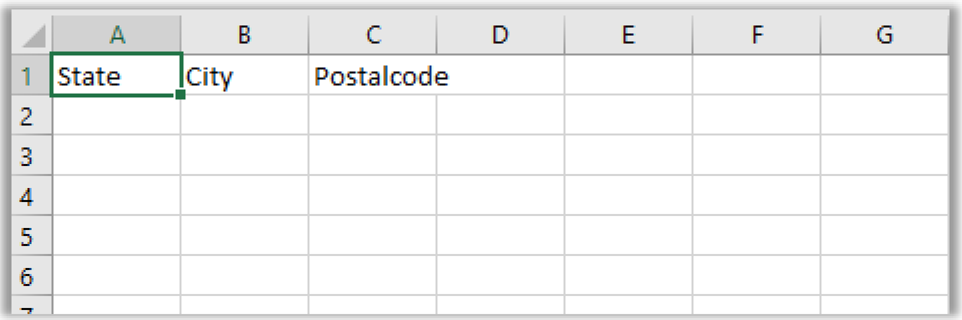
- In case you are moving / copying the territory by creating a new one, it would ask to enter territory name followed with manager selection for the territory.

By File

- You can plot the territories by selecting the shape files with supported extensions .shp, .kml, and .geojson. You can also import the CSV file or create CSV file as per the sample file.



- You can download the Sample CSV File and update the details in the CSV file.

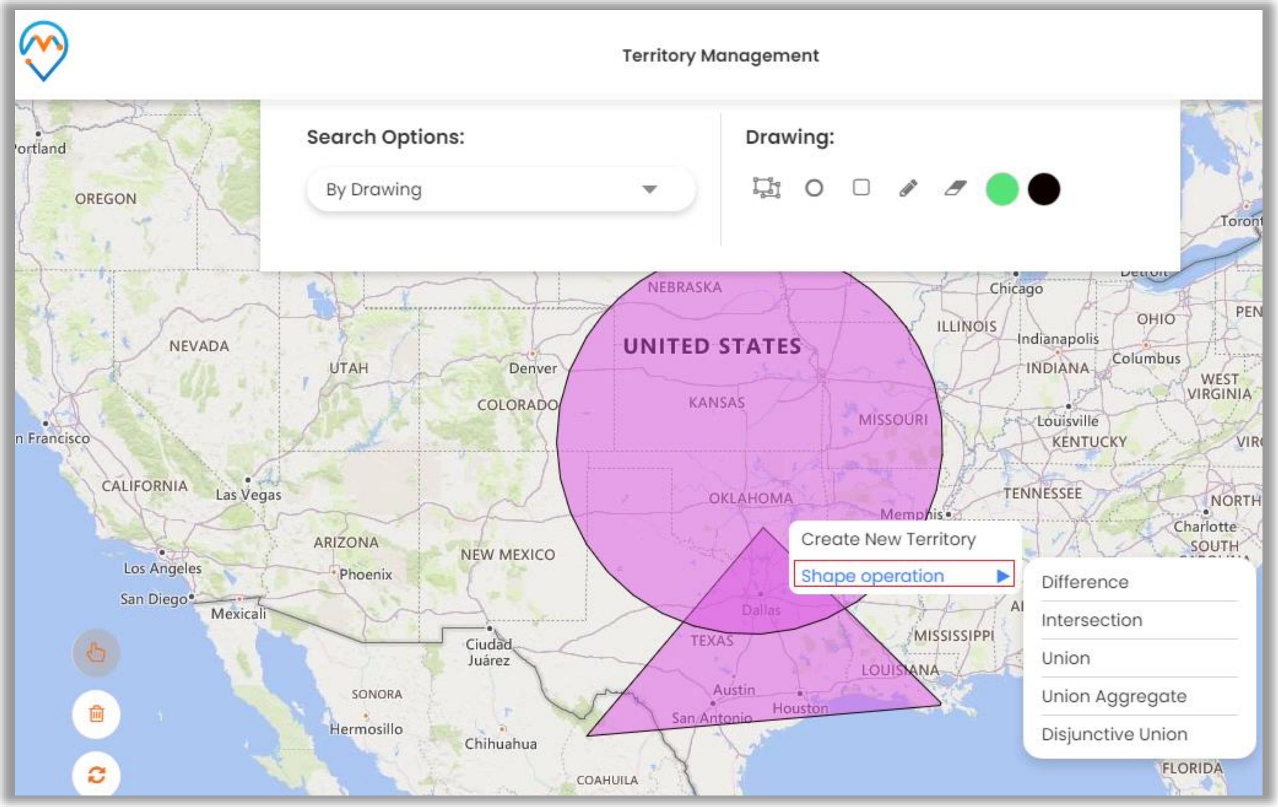


	A	B	C	D	E	F	G
1	State	City	Postalcode				
2							
3							
4							
5							
6							

- Once you update the details in the CSV file, by importing on the map, it will display the Territory. So you can create and manage the plotted region/area as Territory.

Shape Operations

- For drawing shapes plotted on map, user can select shapes that are drawn using drawing tool and right click on them to select binary operations.



- There are five different shape operations available:
  > Difference > Intersection > Union > Union Aggregate > Disjunctive Union.

Note:

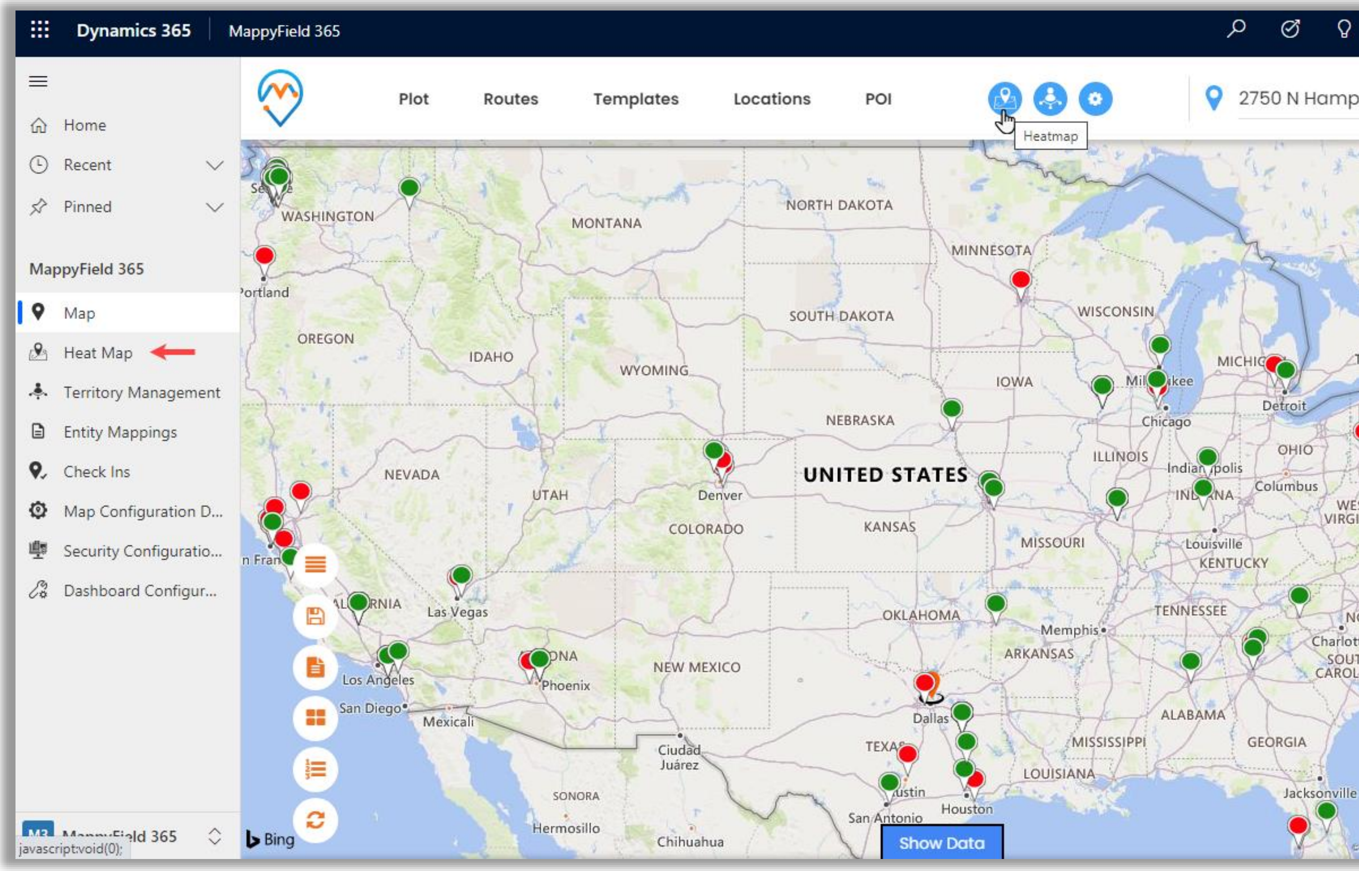
1. Shapes should overlap each other for performing shape operations. In order to perform binary operation, shapes should be selected.
2. Move To/Copy To works on shapes of plotted territories.
3. Create & manage the Territory from the “Map” (activity map) if you have plotted the entity records using “By Region” or “By Drawing” search option.

Heat Map

- Get the aggregated visualization by selecting the data sources of any Entity to check the statistical data. You will have two options to access the **Heat Map**:

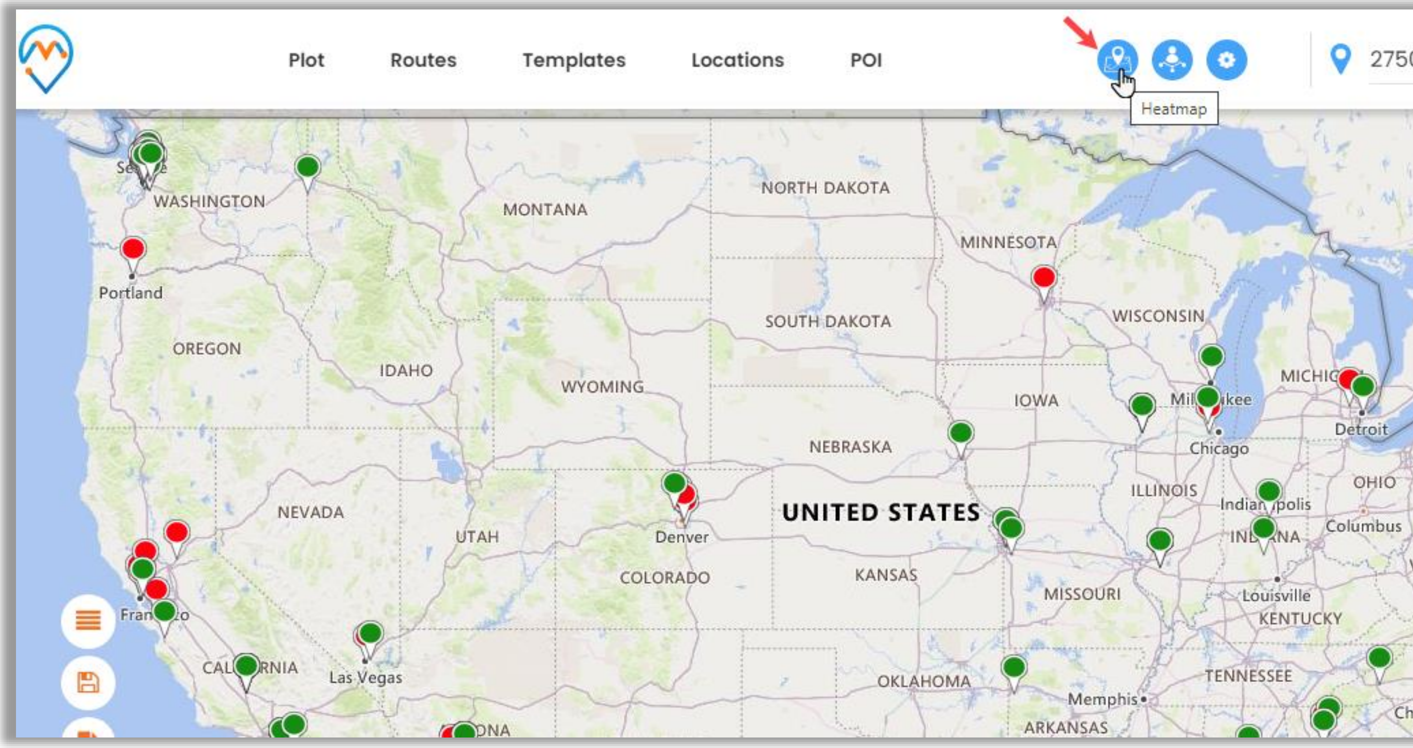
  -> A quick access option from the Map itself.

  -> Individual Heat Map from the MappyField 365 navigation pane on the left side.

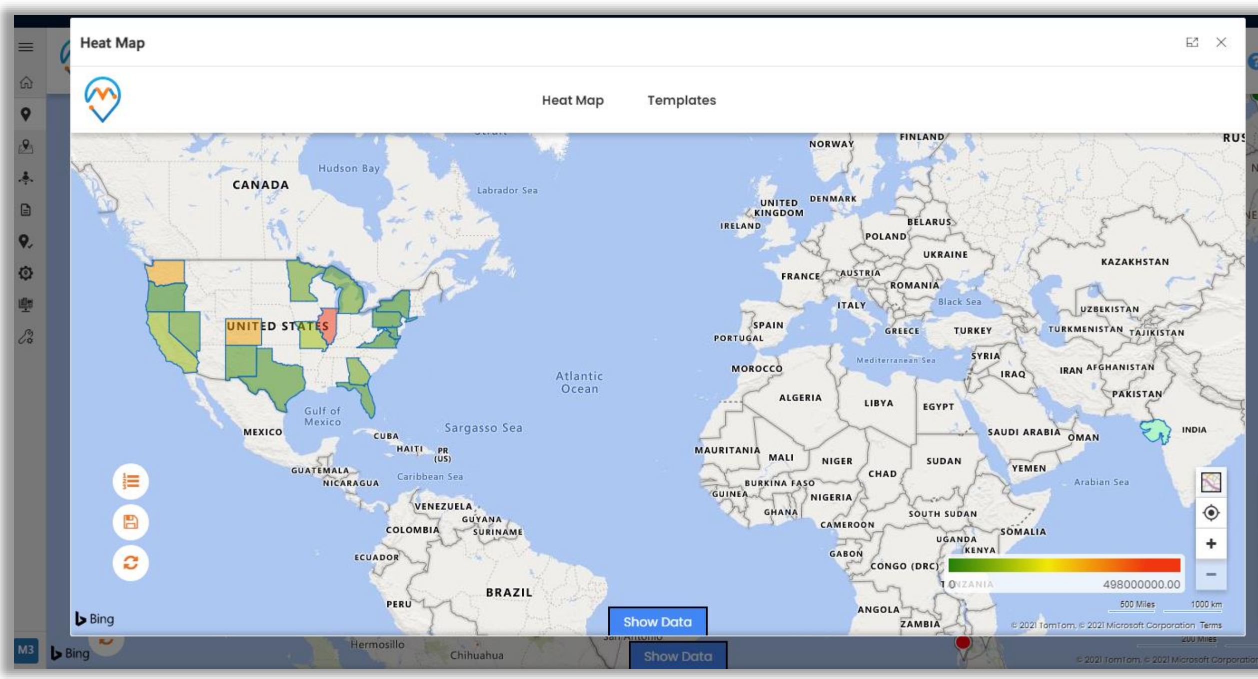


Quick Access Heat Map

- You will find the Heat map 'Quick' access option besides the Menu of the MappyField 365.



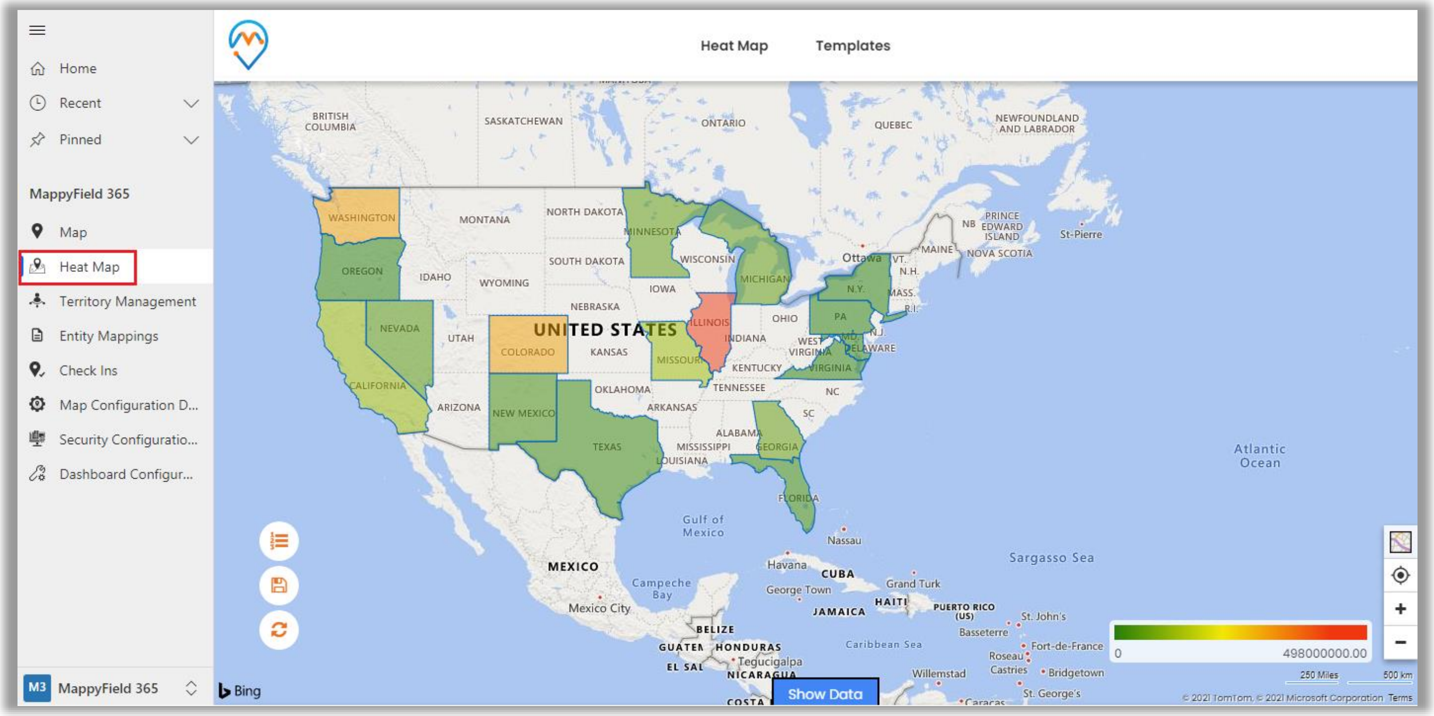
- By clicking on the 'Heat Map' icon, a Heat Map will open as Quick access view. Here, the Heat Map will load with default plotted data as per the default template.



- You can enter the Heat Map in the Full screen by clicking on Full view icon besides close **x** icon.

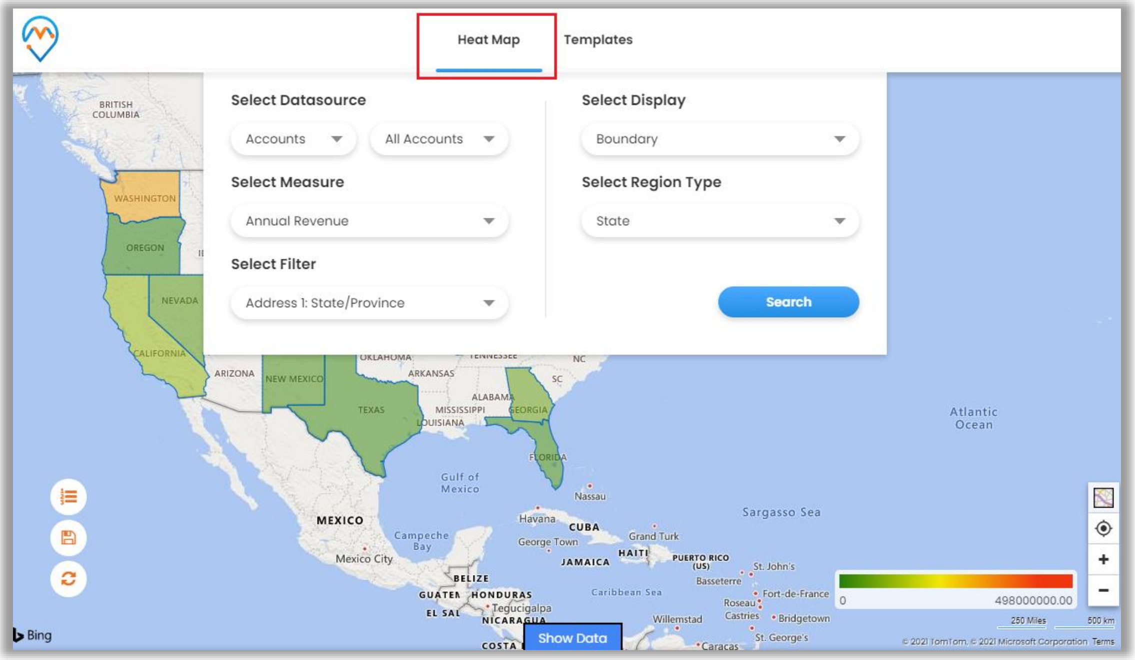
Heat Map Navigation

- By clicking on Heat Map from the navigation panel, the Heat Map page will be open and load with plotted records as per the default template selection.
- You can plot records of the Entities on the Heat map that are already configured in “Entity To Map”.

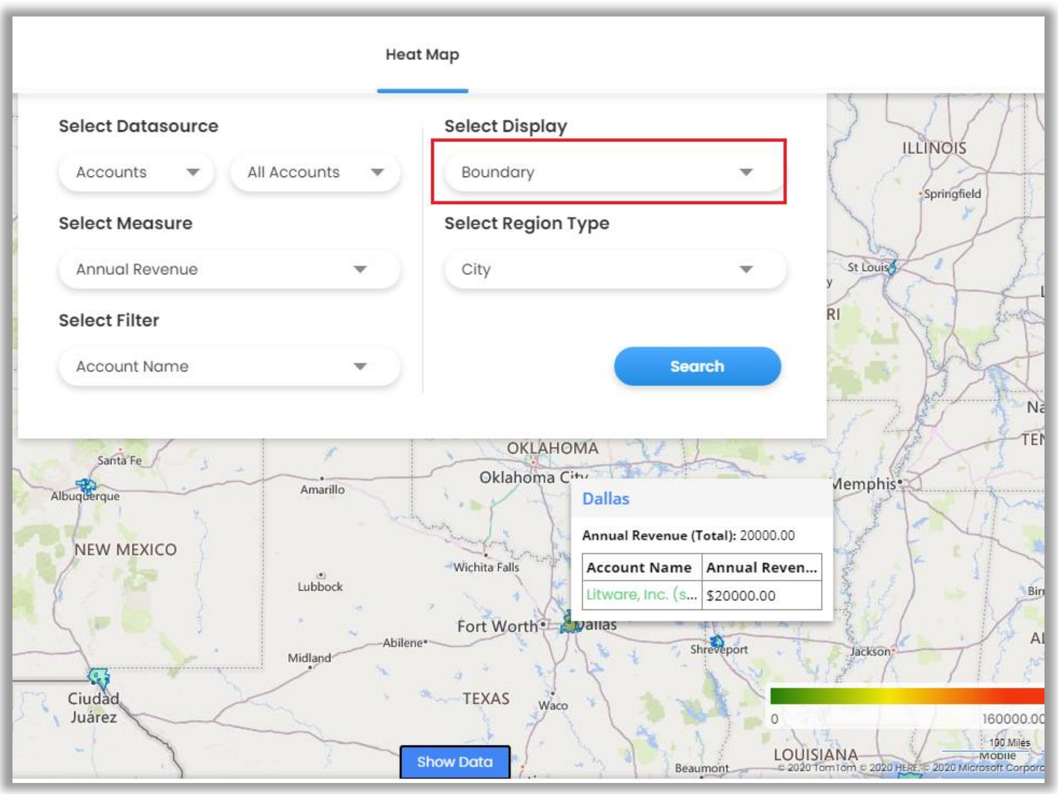


- It would open a map for you to select further map options. Here, it would list all those entities that are configured under Entity Mappings.

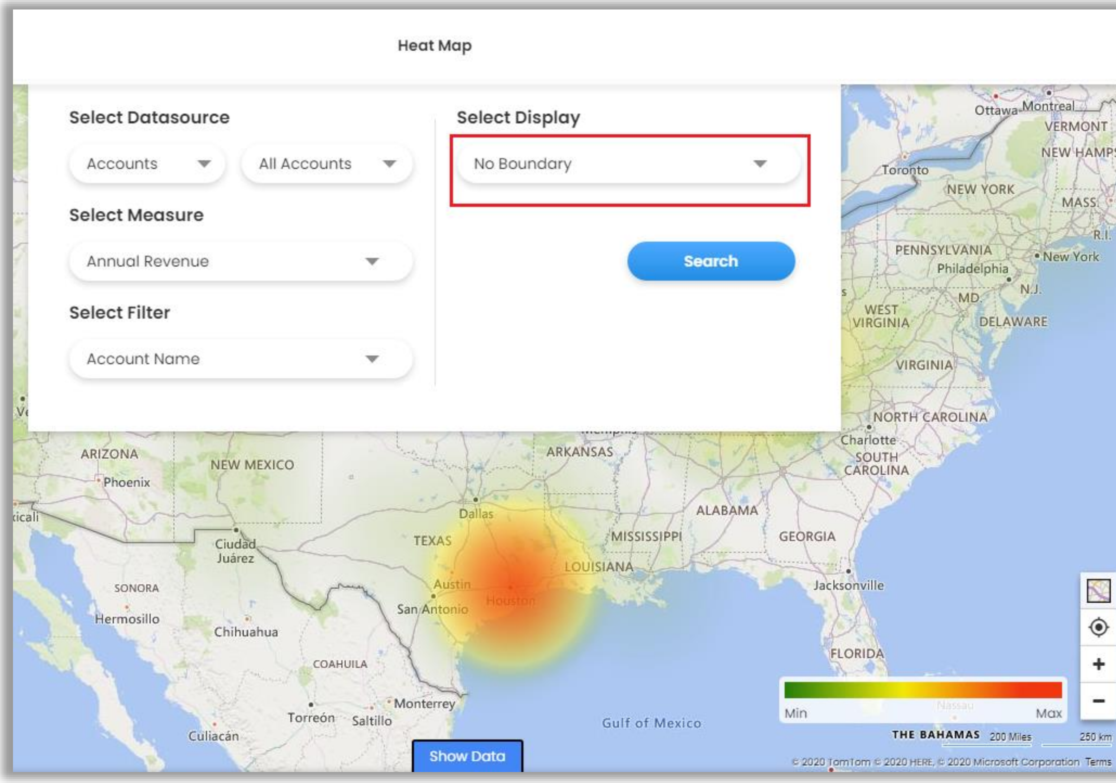
- Different options are:
    - **Select Data source**: Choose entity and its view to analyze data.
    - **Select Measure**: Select the aggregation method to be used to color code the region. By default, it would be based on number of records.
    - **Select Filter**: This option lets you select category to filter data results.
    - **Select Display:** You get four different options to analyze data on heat map. Options are:



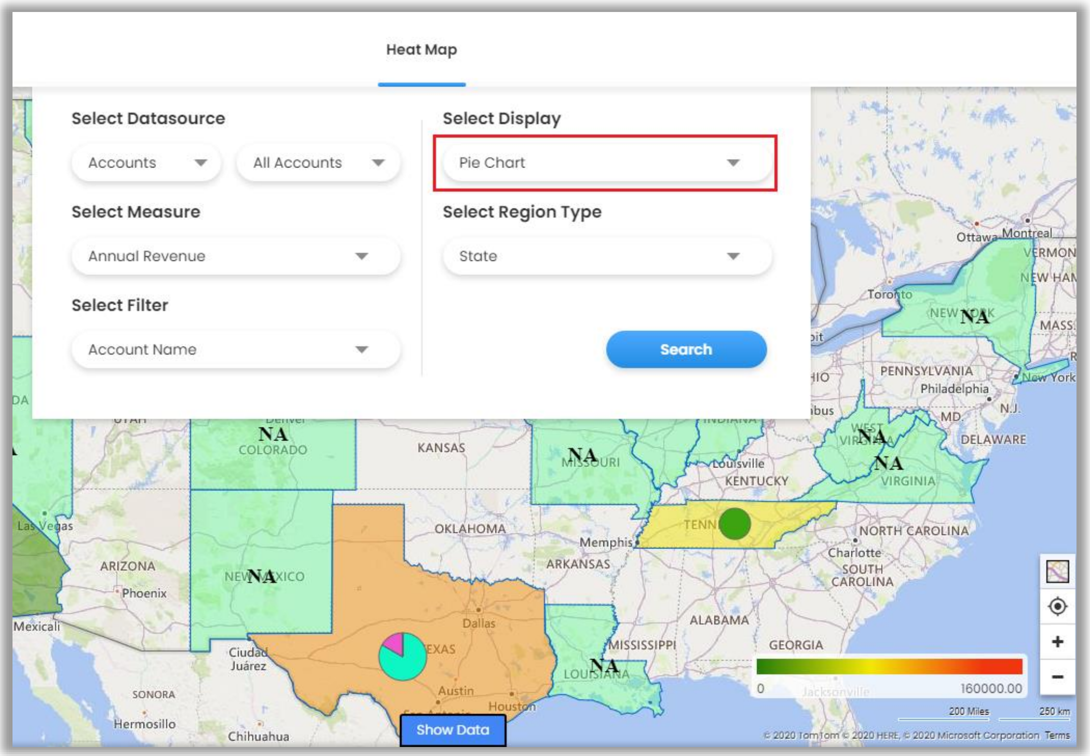
- **Boundary**: This creates heat map based on selected region type.



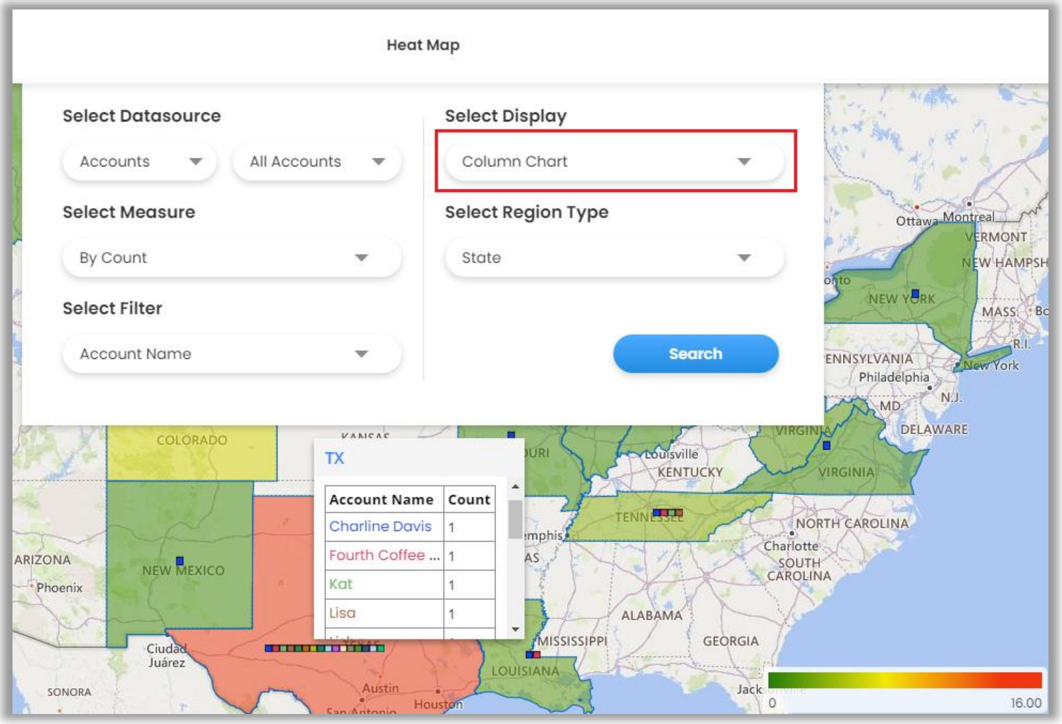
- **No Boundary**: This option creates heat map based on density of the measure selected without geographical boundaries.



- **Pie Chart**: View data in form of pie charts based on attributes selected in measure & filter.



- **Column Chart**: View data in form of column charts based on attributes selected in measure and filter.

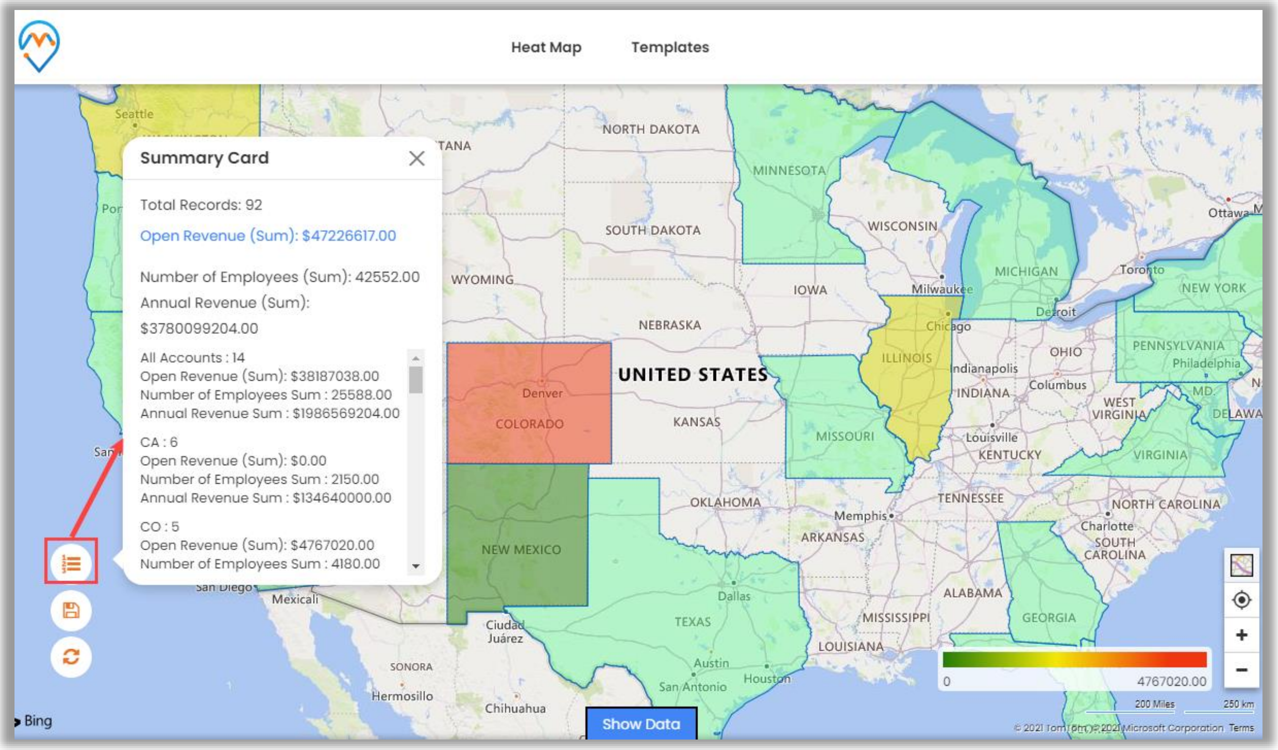


- **Select Region Type**: Define geography level of aggregation. It can be any from the city, state, country, and postal code.

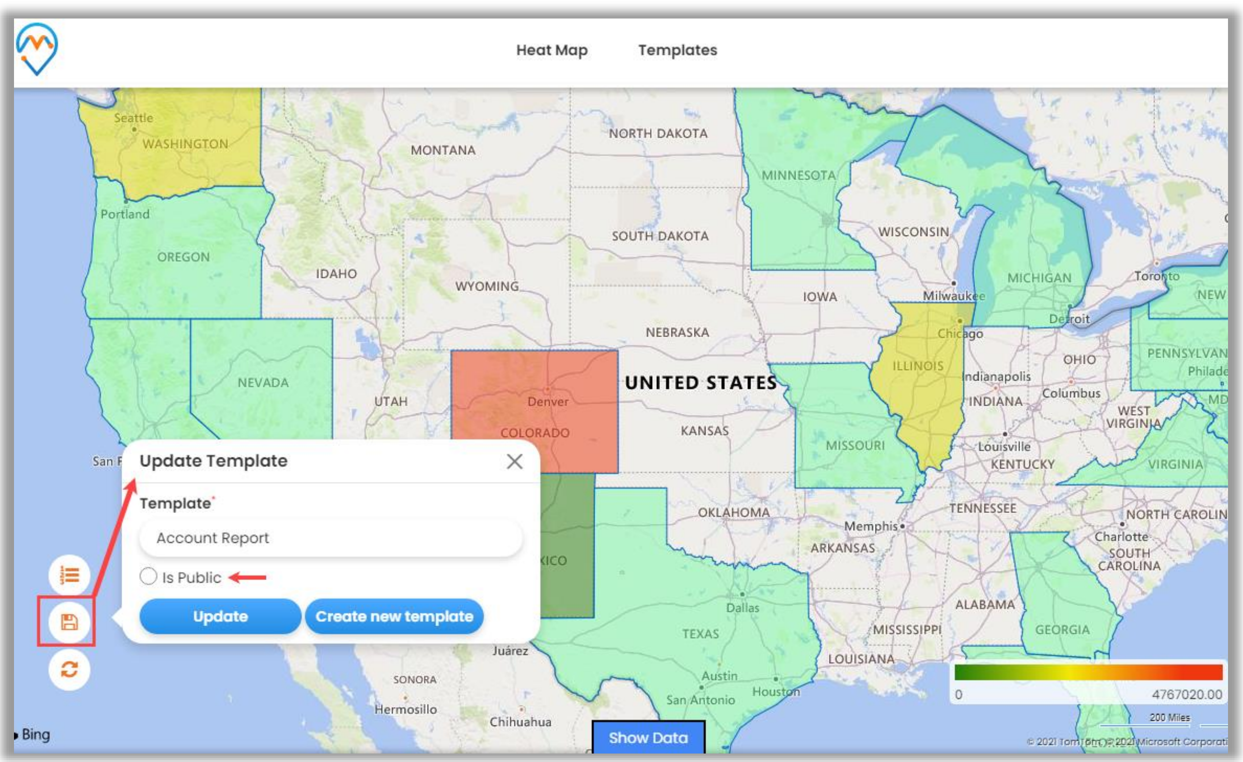
Note: On hover, it shows details of the boundary, pie chart or column chart attributes and clicking on a specific highlighted region shows up the summarized information for the same.

Heat Map Templates

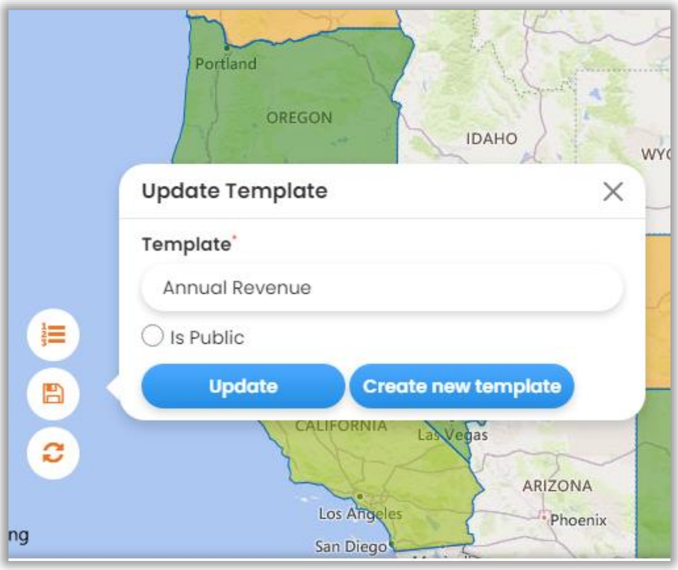
- Once all the Heat Map is generated by selecting the Data sources of any entity, you can check the records in the Summary Card and save the heat map as a template.



- By clicking on the 'Summary Card' icon, you will get the total records with the data source details.
- By clicking on the 'Save' icon, you can save the Heat map as a template for future use.

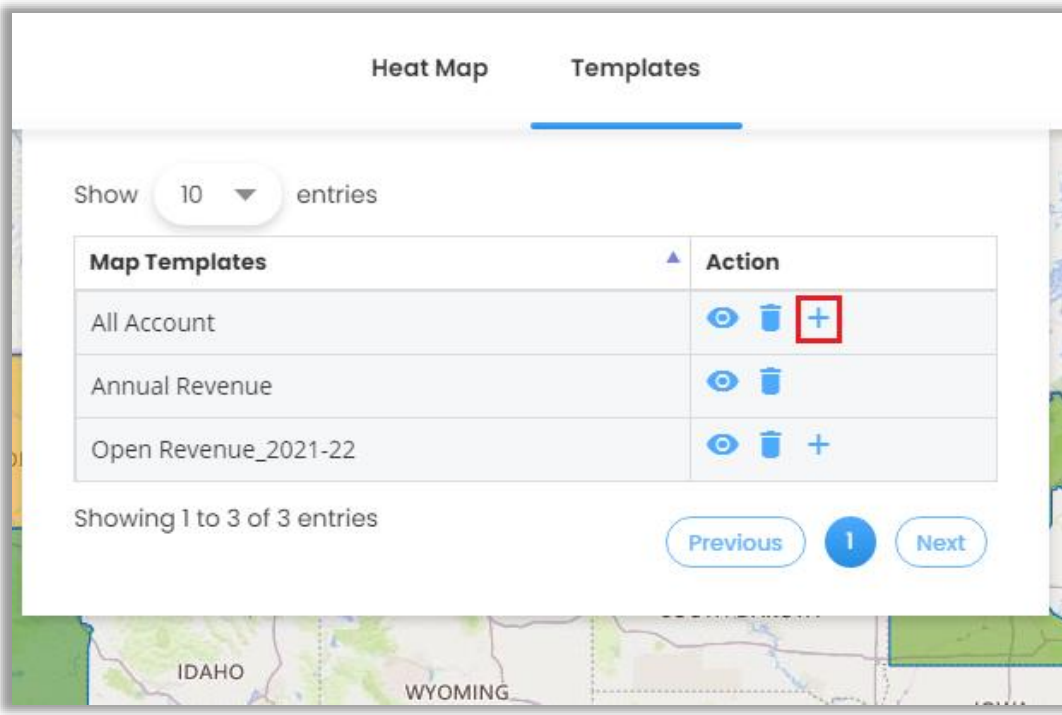


- If you want to replace with existing Template, click on the **Update** button, that will be replaced the heat map with new data sources.



- To create a new template click on the **Create new template** button and it will be saved as template.
- By selecting the **Is Public option** the template will be shared with other team members (CRM Users).

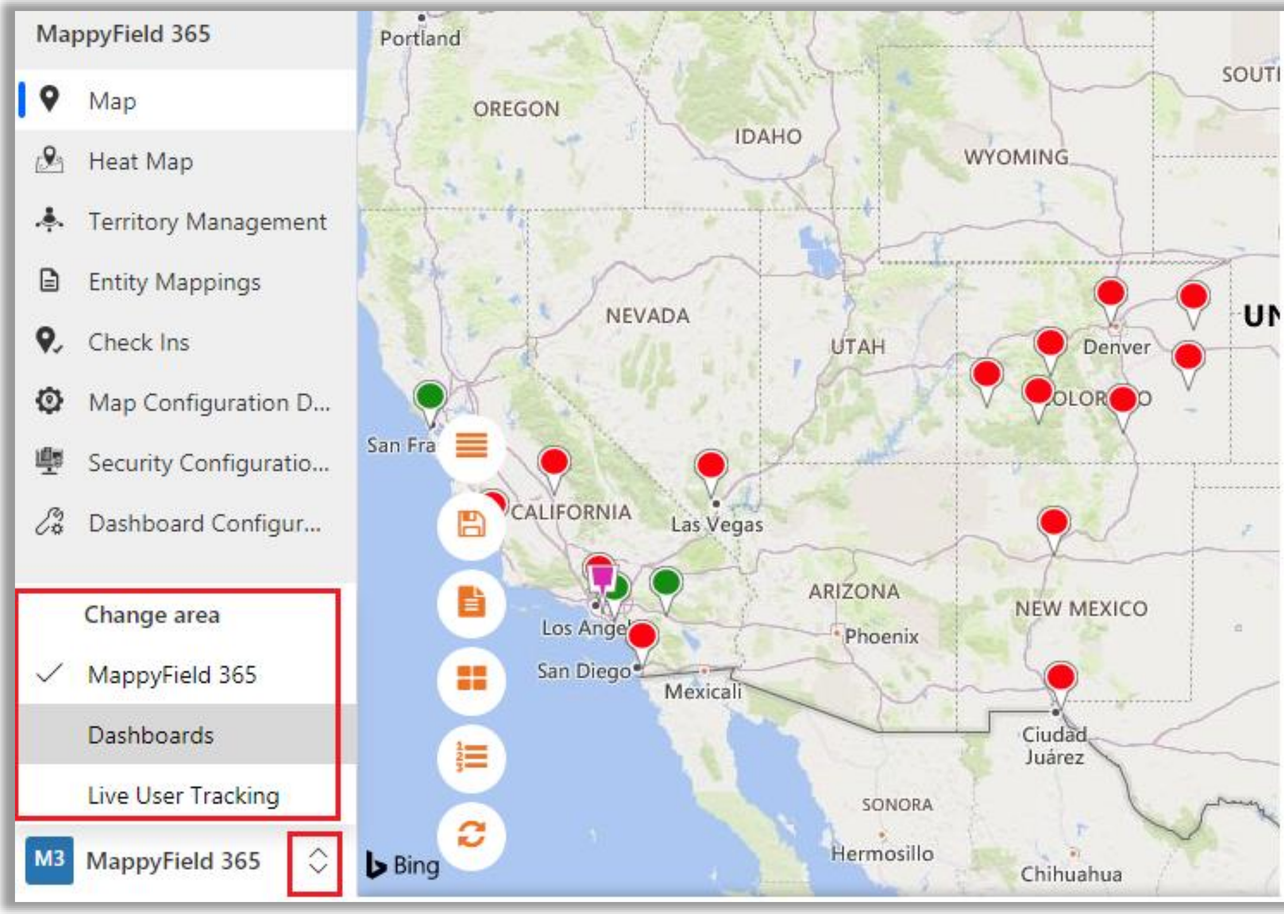
- The template that is assigned as a default template will appear in the 'Template'. If you click on the Update button, it will replace with a heat map of the default template.
- Now, by clicking on the 'Templates', you will get the list of the saved templates of the different heat maps.

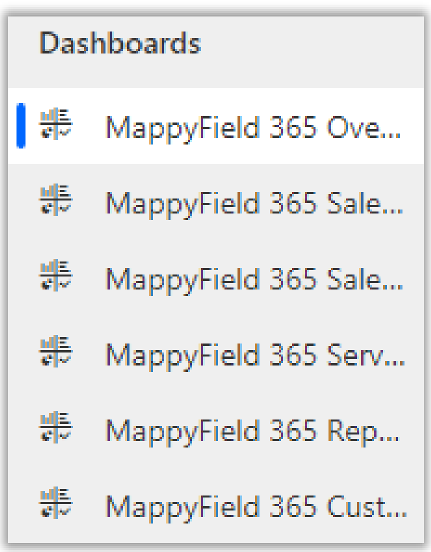


- To make a default template, click on the **+** icon, it will be set as default template and when you (or any CRM users) will navigate to the Heat map, it will load that default template.
- By clicking on the view icon, you can view the data source of that template on the heat map. You can also delete any unwanted Heat Map template by clicking on the delete icon.

Analytical Dashboard

- The dashboards are provided in the left navigation panel from the MappyField 365.





- There are **six** different MappyField 365 **dashboards:**

  > Overview Dashboard

  > Sales Activity Dashboard

  > Sales Performance Dashboard

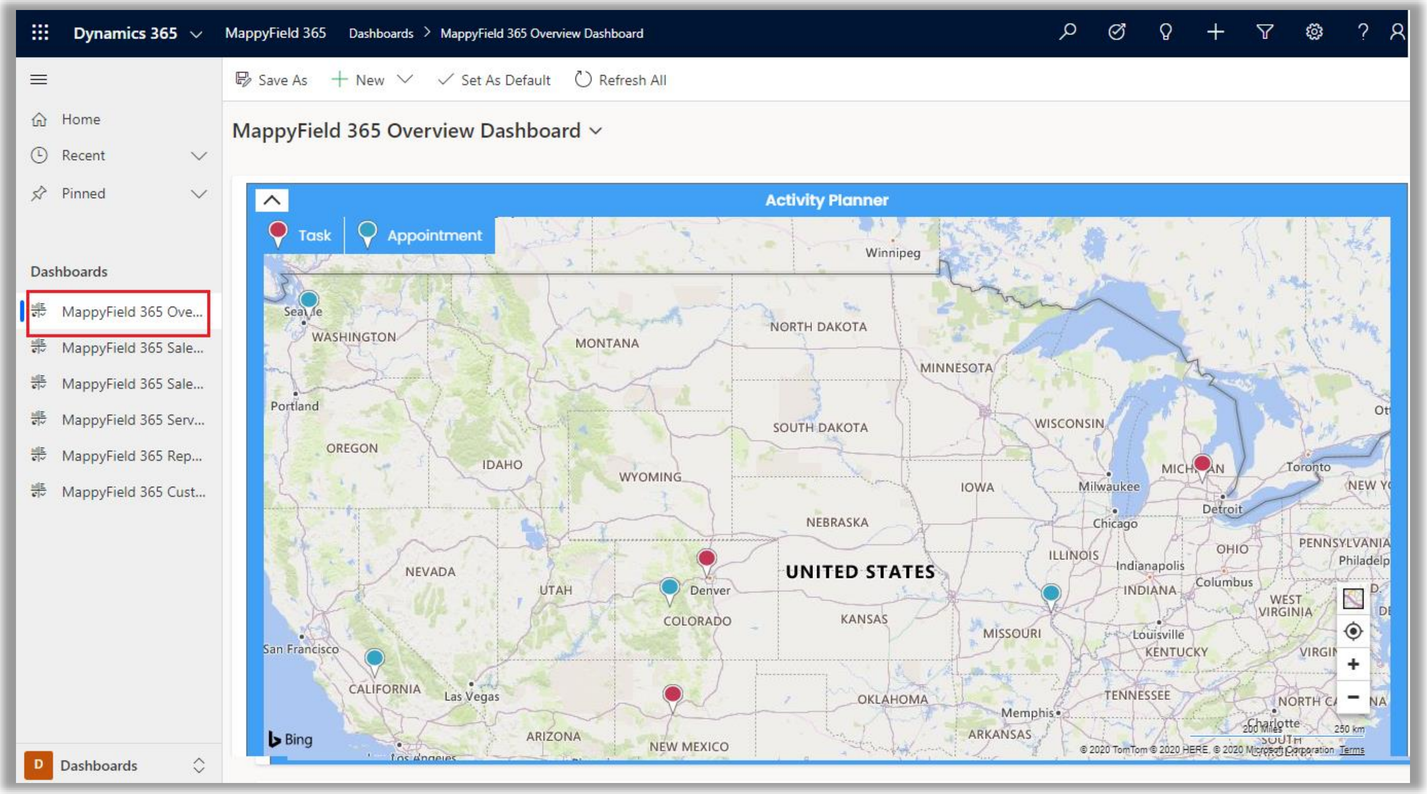
  > Service Activity Dashboard

  > Reporting Dashboard

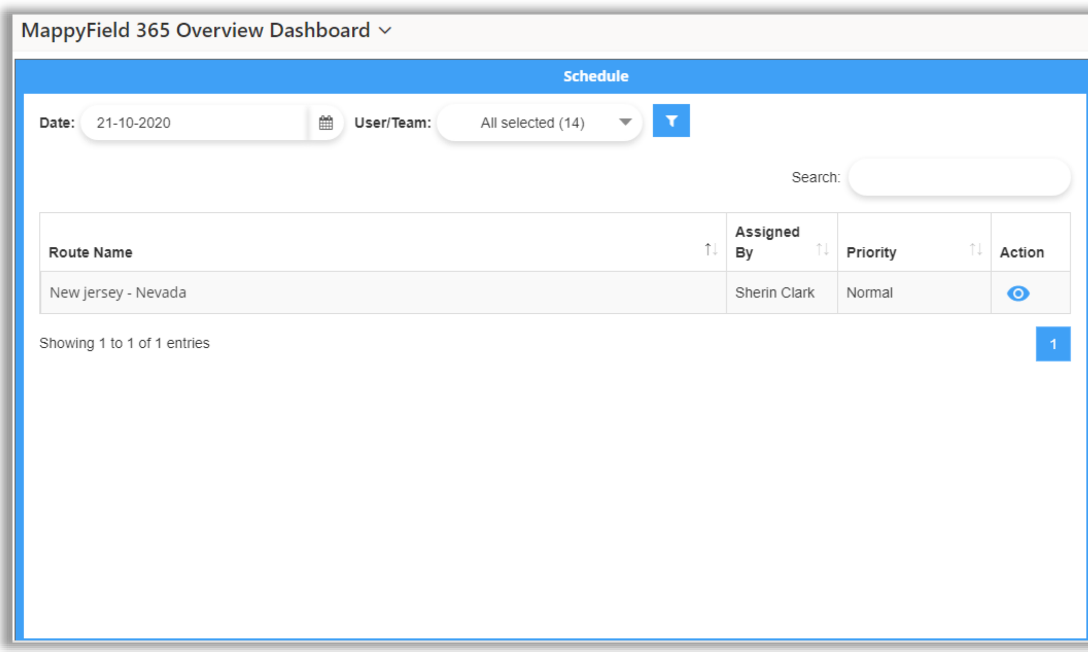
  > Custom Dashboard

MappyField 365 Overview Dashboard

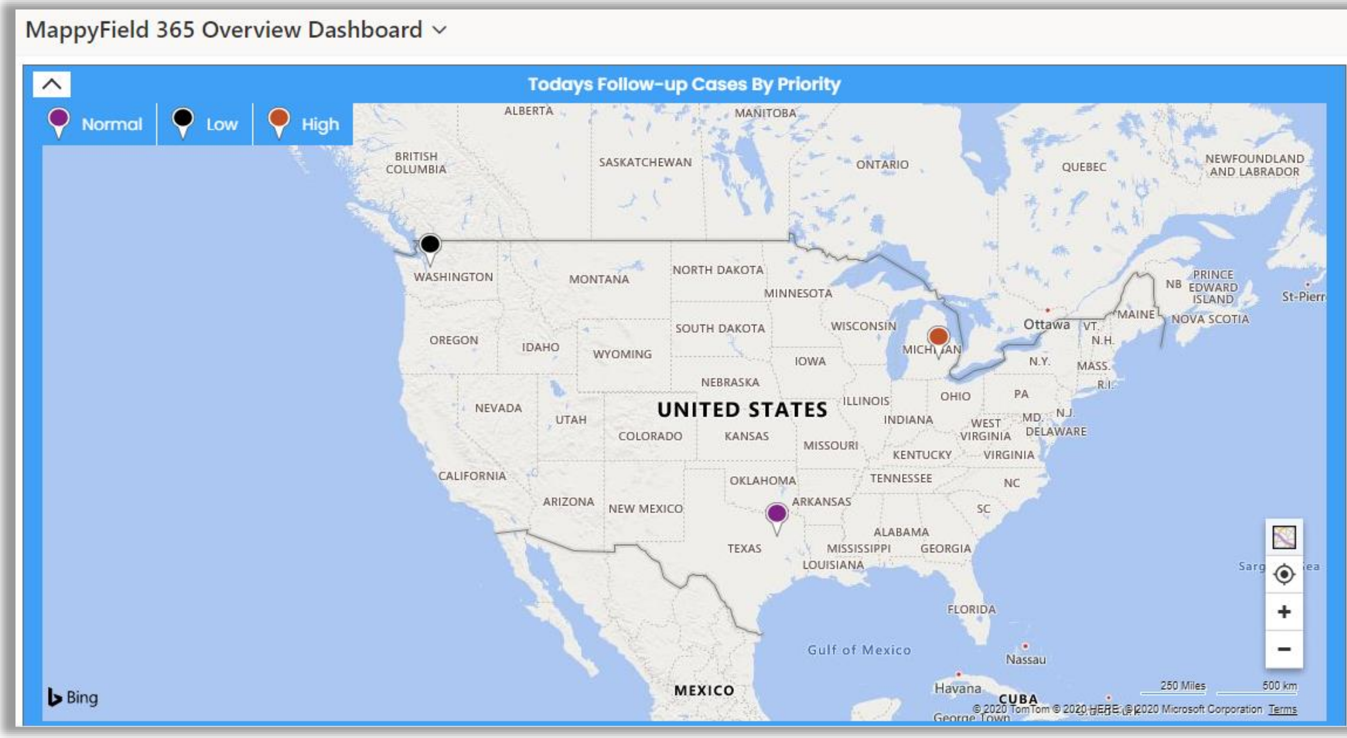
- You will get the **MappyField 365 Overview Dashboard** with following dashlets: **>** Activity Planner
  > Schedule **>** Todays Follow-up Cases By Priority **>** Top 10 Opportunities
  - **Activities Planner:** It displays activities like Task, Appointment, Service Activity of current month in map related to activities related to account/customer.



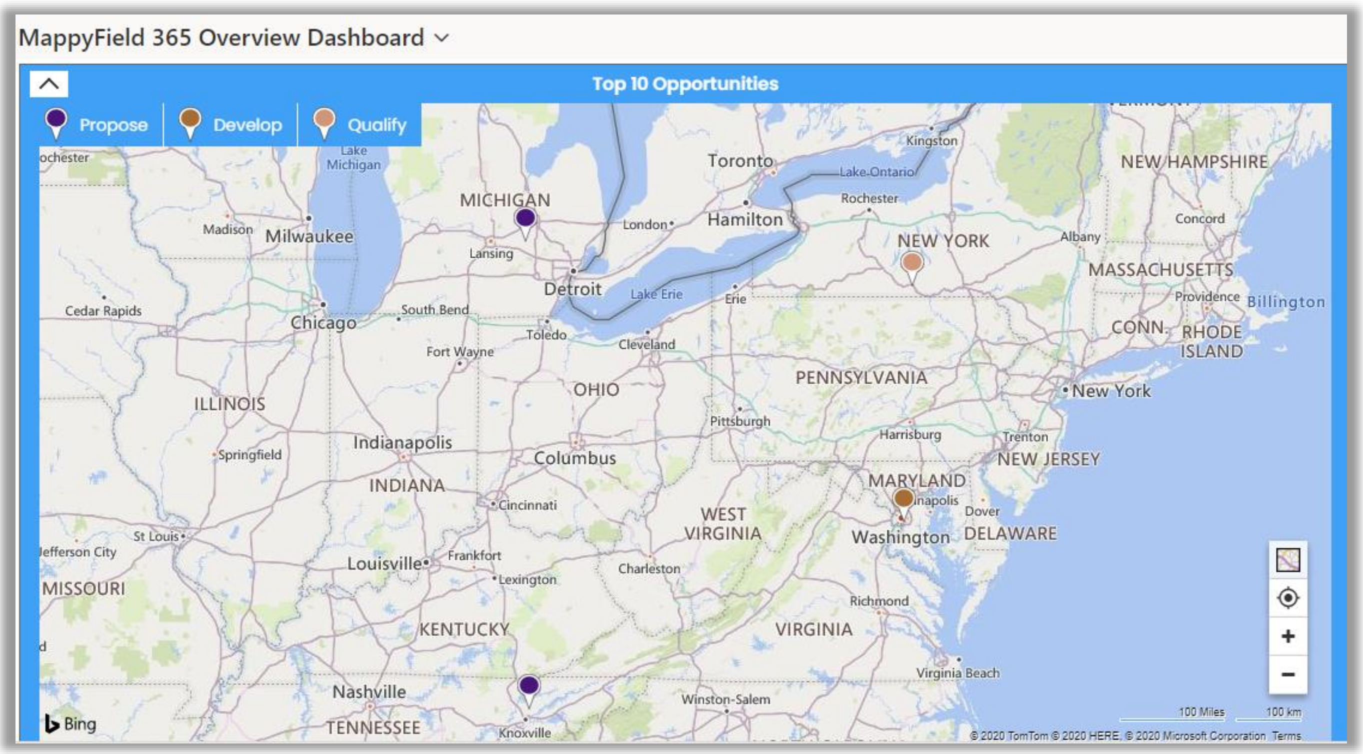
- **Schedule:** It displays all saved auto scheduled routes with date filter. By default, you can see the schedule route as per the current. Users filter is only available for admin users.



- **Today’s Follow Up Cases by Priority:** It displays all the cases that are to be followed upon for the current day.



- **Top 10 Opportunities:** It plots top 10 opportunities based on revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.

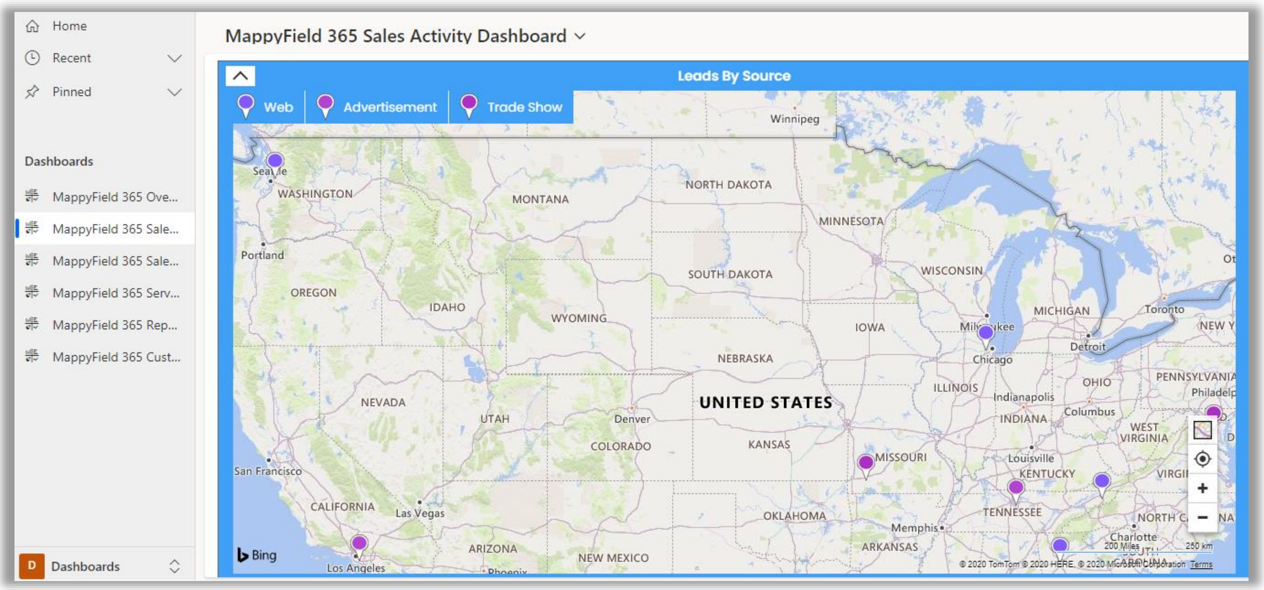


MappyField 365 Sales Activity Dashboard

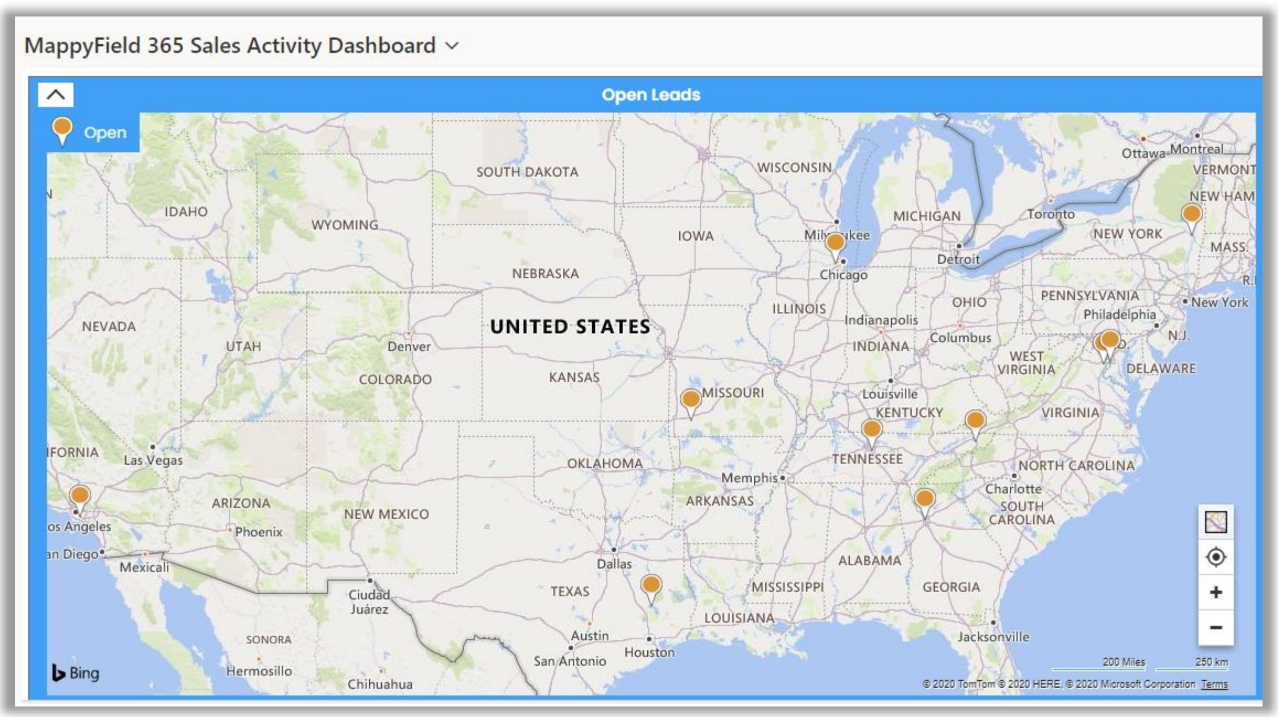
- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:

  > Lead By Source > Open Leads > Sales Pipeline > Top 10 Invoices

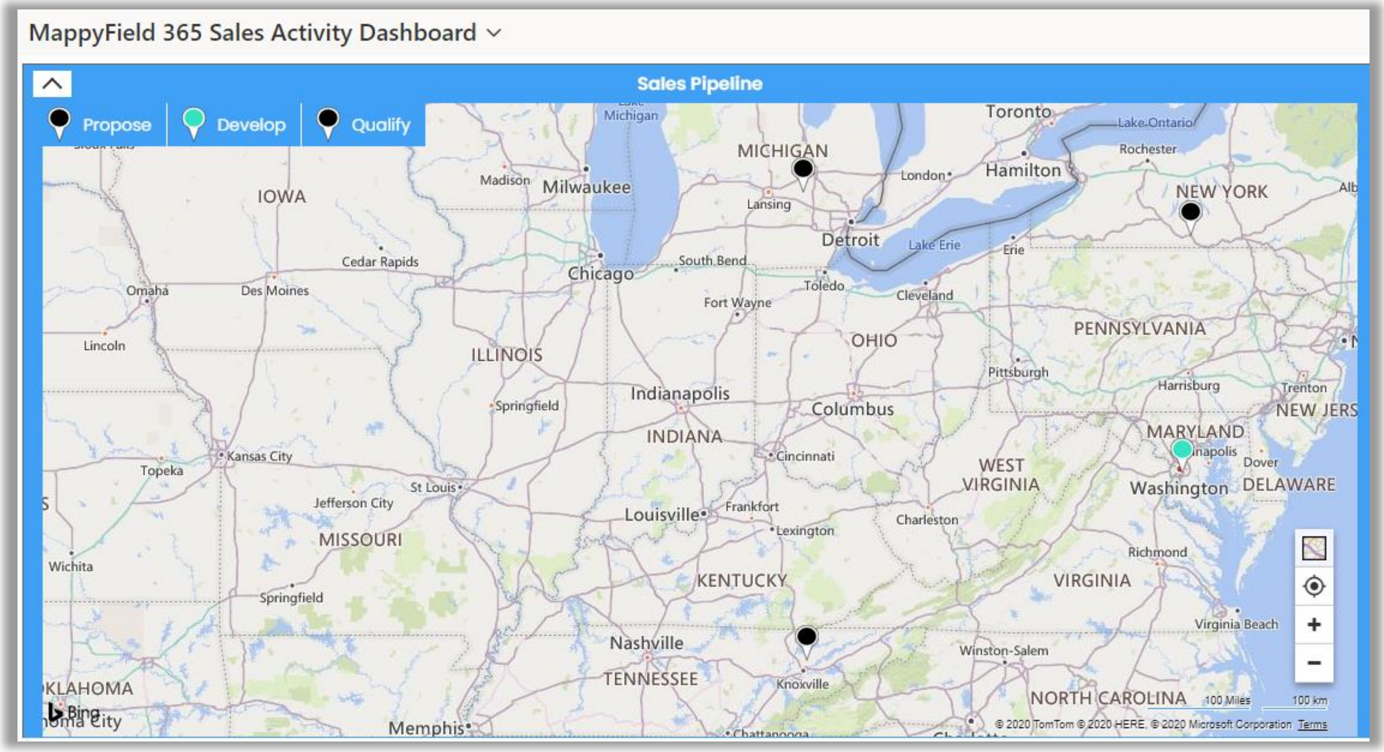
  - **Leads by Source:** It will display all open leads based on their source creation. It can be an Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, Web, Word of Mouth and Other.



  - **Open leads:** It will display all open leads for the current month.



- **Sales Pipeline:** It will display all open opportunities based on the revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.



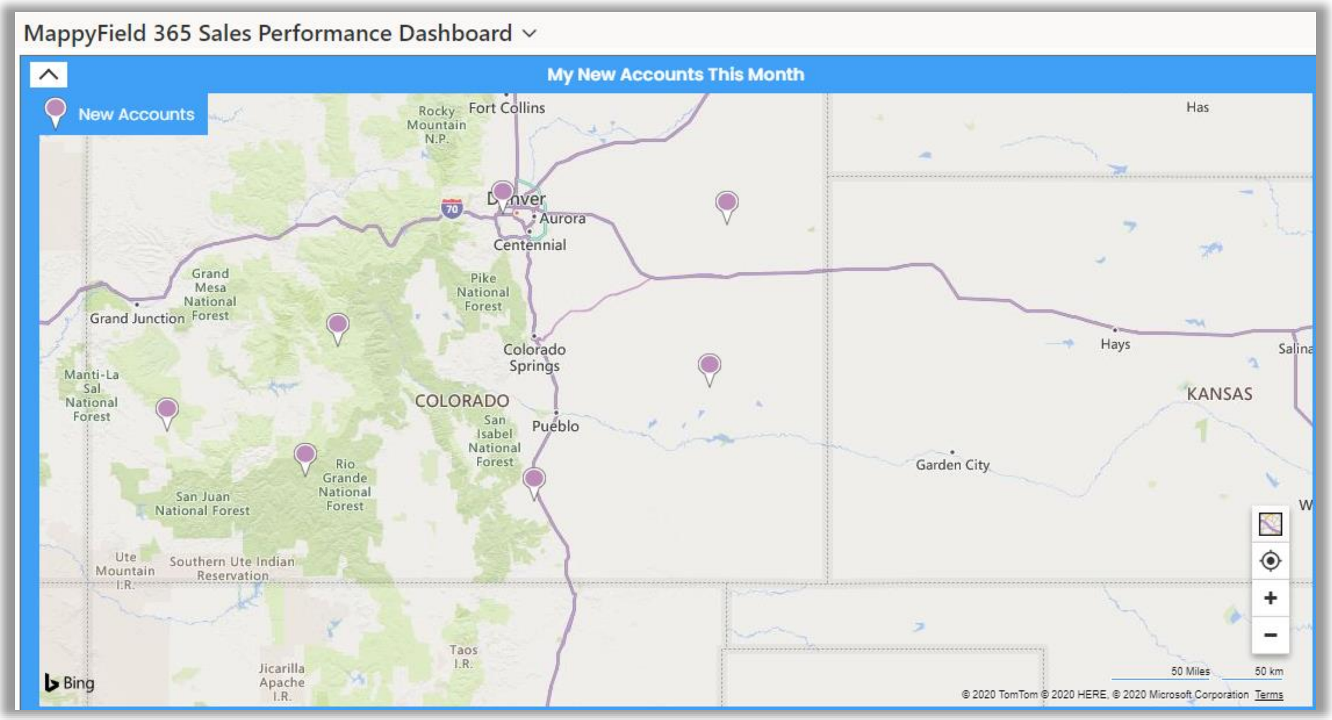
- **Top 10 Invoices:** It will display Top 10 Invoices with respect to total amount of the invoice.

MappyField 365 Sales Performance Dashboard

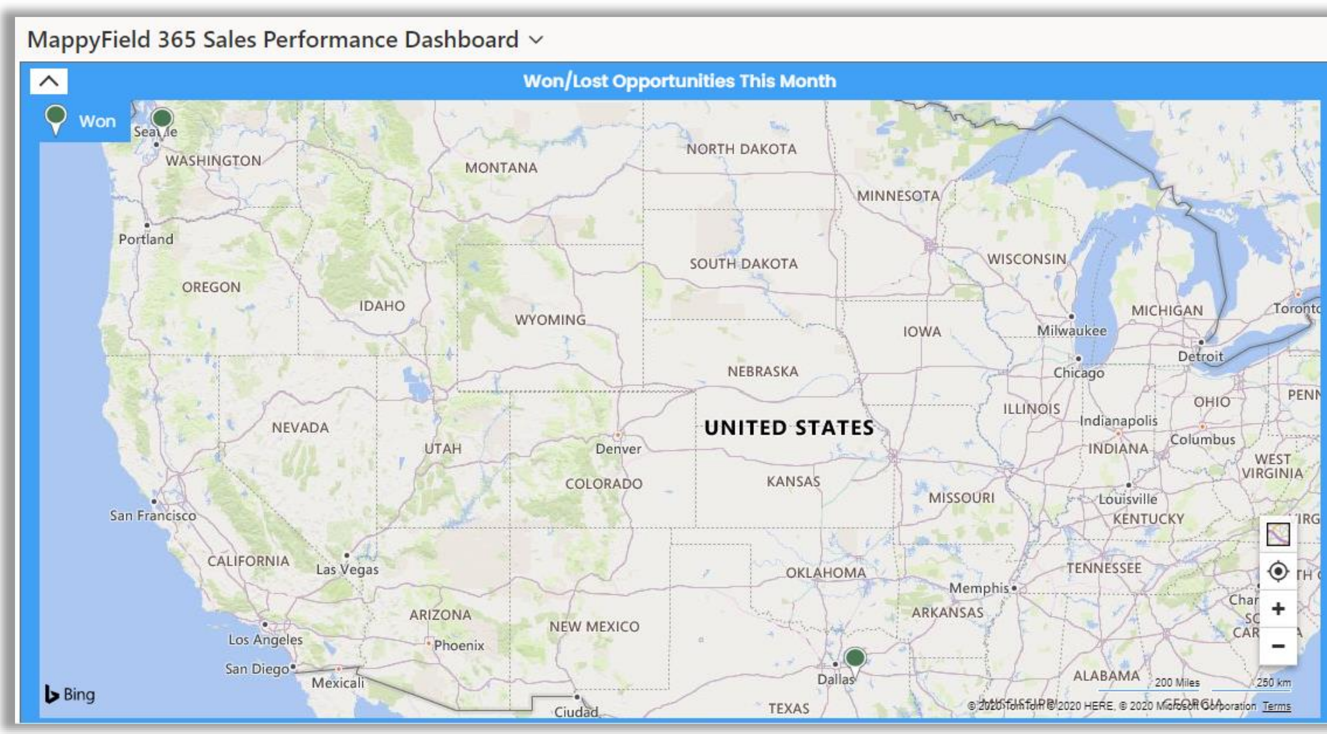
- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:

  > My New Accounts This Month **>** Won/Lost Opportunities This Month **>** New Leads This Month

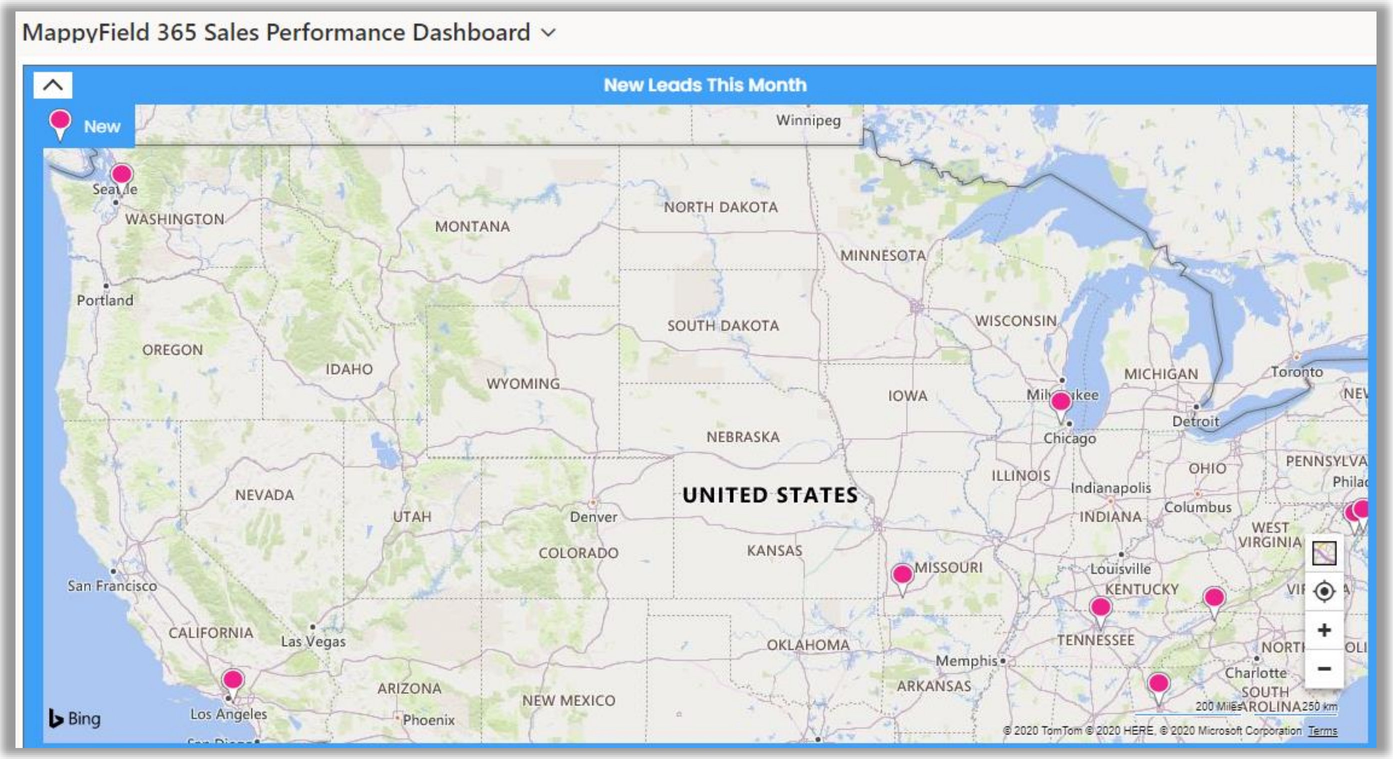
  - **My New Accounts This Month:** It will display all open leads created this month.



  - **Won/Lost Opportunities This Month:** It will display all Won/Lost opportunities this month.

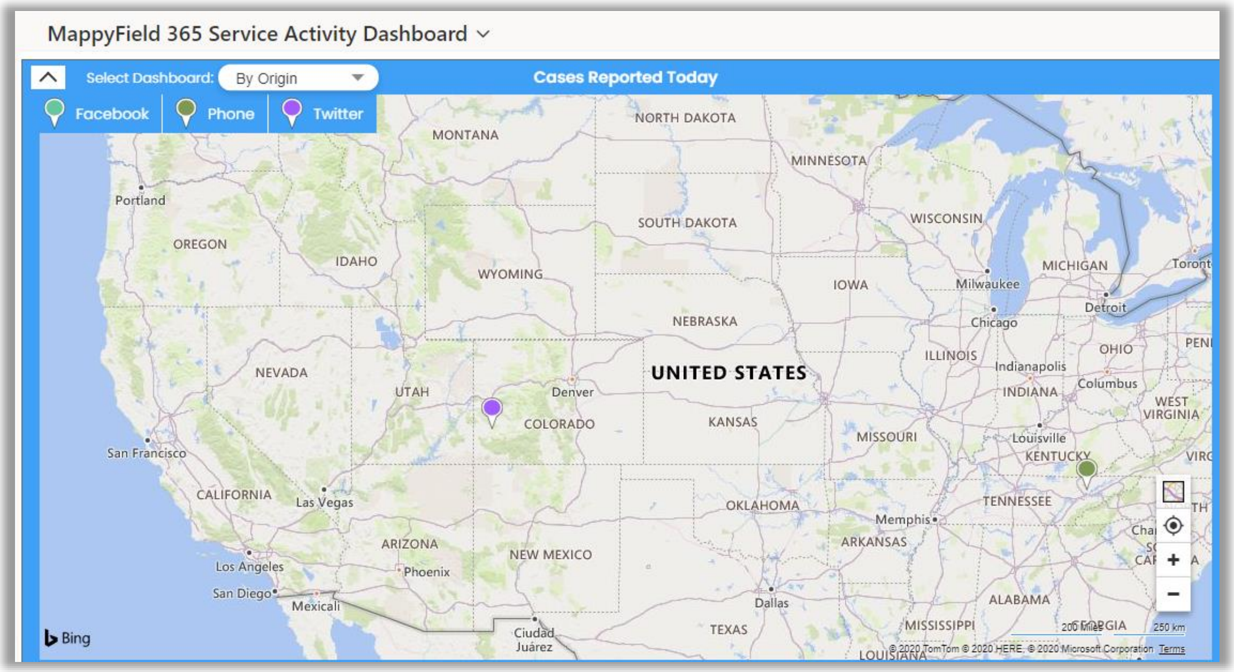


- **New Leads This Month**: It will display new accounts created for the month.

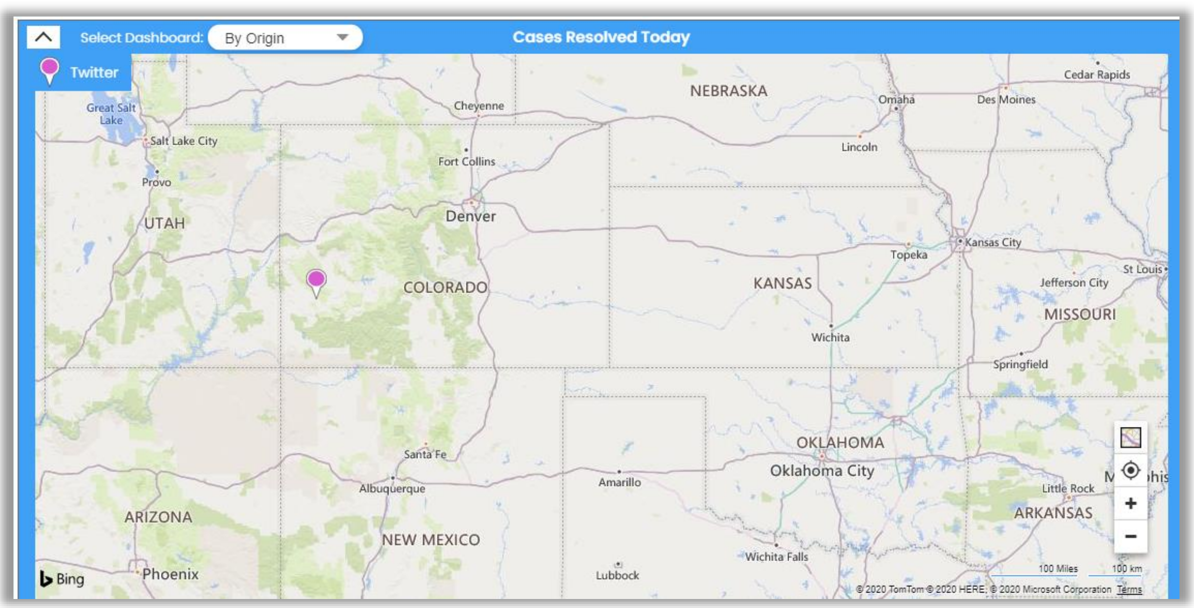


MappyField 365 Service Activity Dashboard

- By clicking on **MappyField 365 Service Activity Dashboard**, you will get the Dashboard of Service Activities with following dashlets:
  > Cases Reported Today **>** Cases Resolved Today
  - **Cases Reported Today:** This dashlet would show all the cases reported on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.



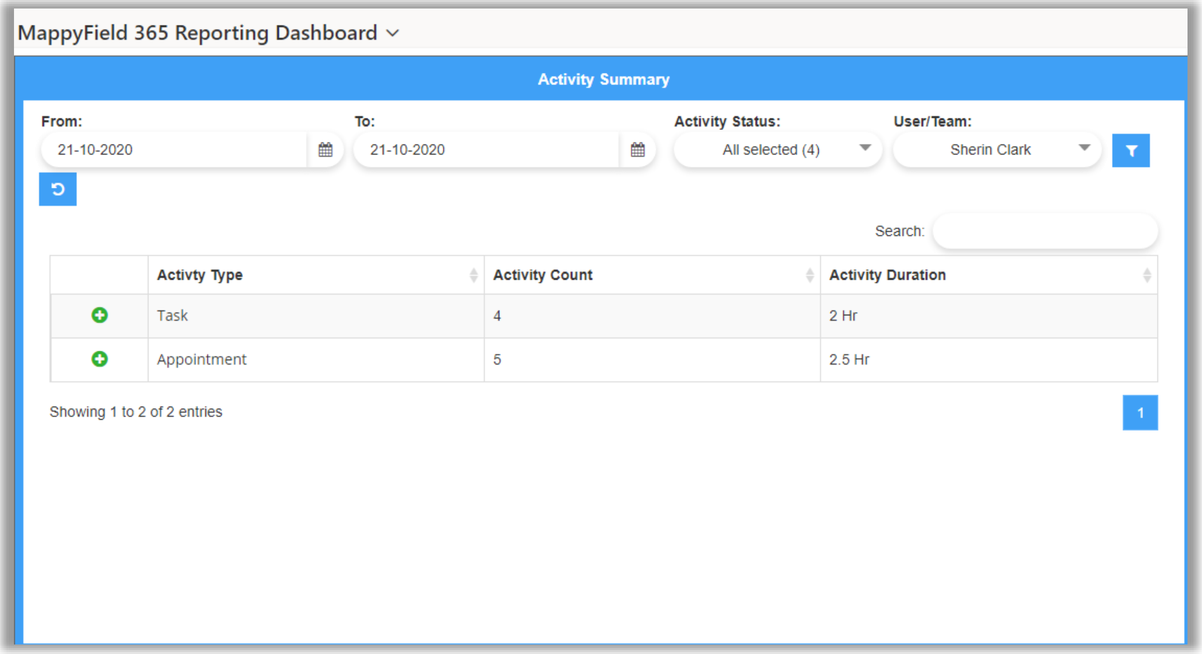
  - **Cases Resolved Today:** This dashlet would show all the cases resolved on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.



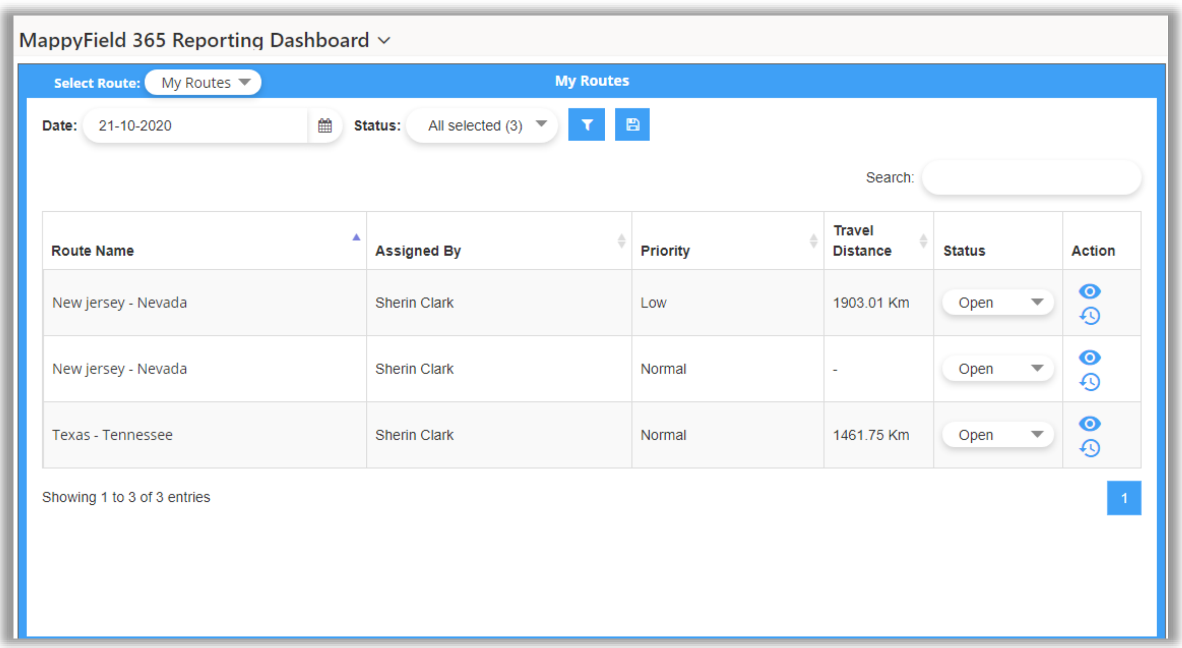
Note: Dashboard will show data only if respective entity is mapped and has records. In case of customer related entities, it is mandatory to map accounts or contacts entity to view records in map. User can redirect to records directly from the dashboard.

MappyField 365 Reporting Activity Dashboard

- By clicking on MappyField 365 **Reporting Dashboard**, you will get the Dashboard with following dashlets: > Activity Summary > My Routes or All Routes
  - **Activities Summary:** It displays summary of all the activities like Task, Phone calls Appointment, Service Activity of current day in list view. You can search the record as per inserting Dates. You can check the user wise Summary. Only a user who has Admin rights will get the Filter option.

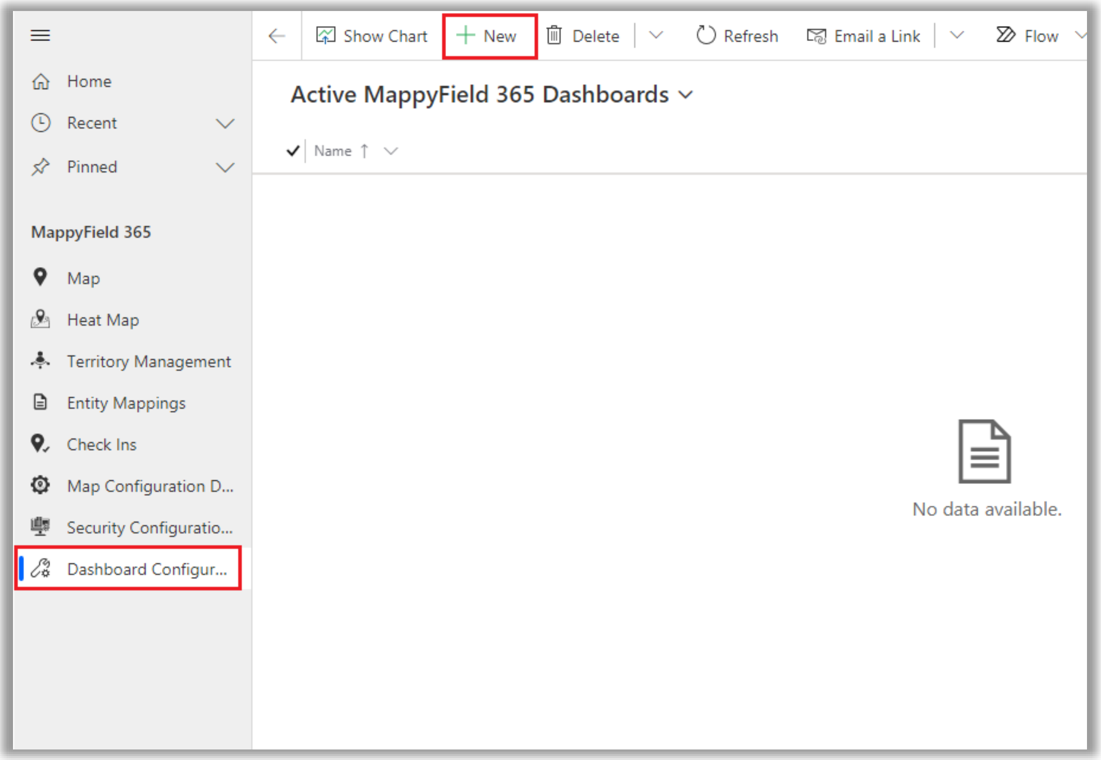


  - **My Routes:** It shows list of all routes for the particular day. For normal user, it shows routes assigned to them or created by them while admin user can view routes of all users. You can check your Route *or* All Routes by selecting from the drop down of **Select Route**. You can update the Status like Completed/Cancelled along with that you can view the Route and reschedule it.

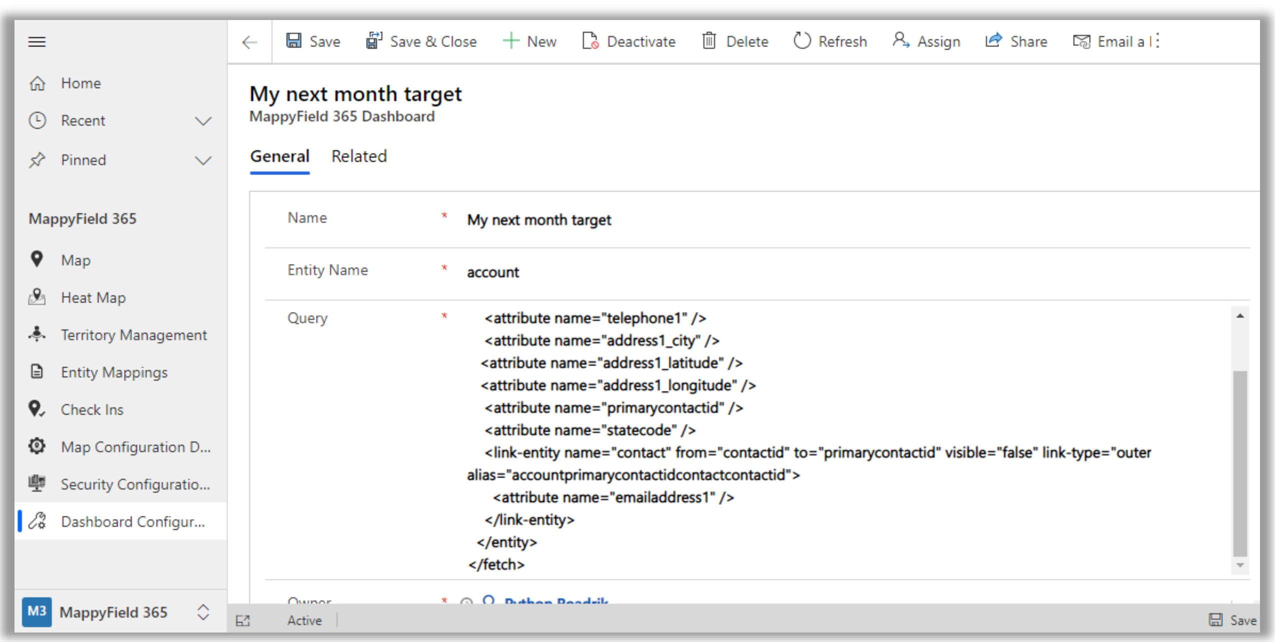


Custom Dashboard

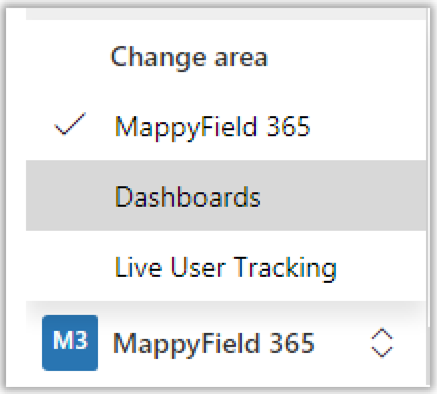
- You can configure the custom dashboard as per your requirement by selecting the entity and its relevant records.
- For that navigate to the **Dashboard Configuration** from the MappyField left side navigation pane.



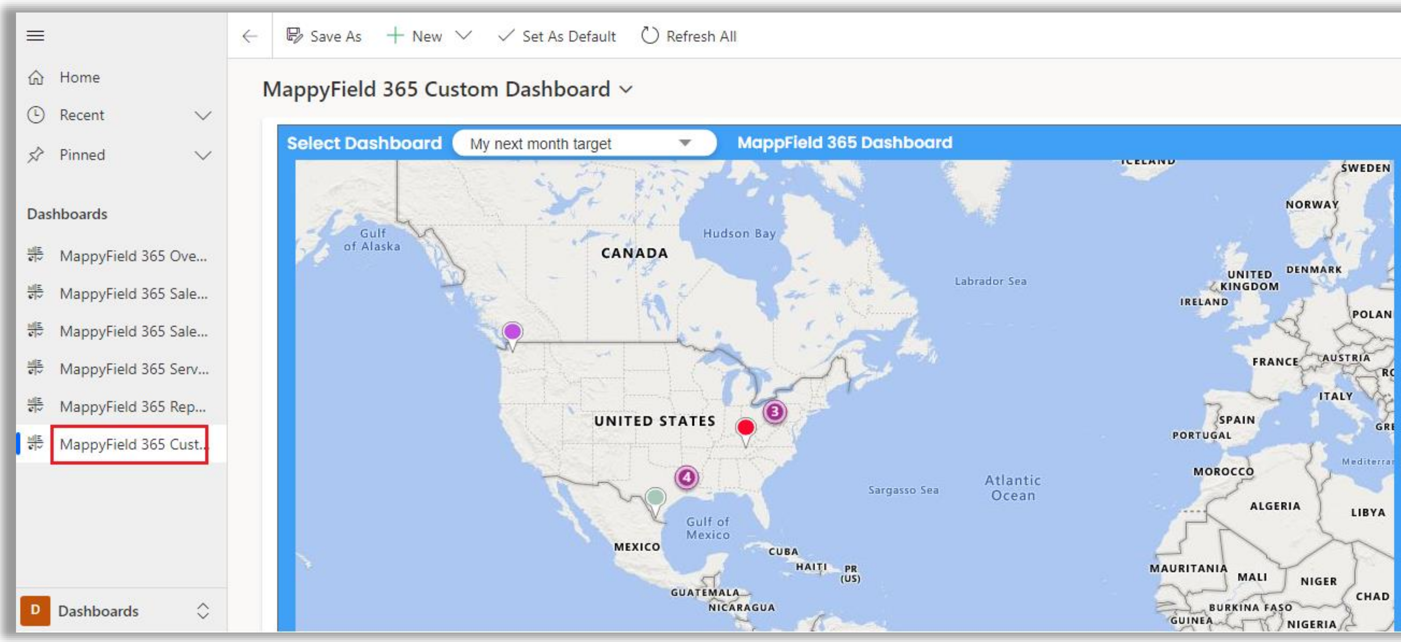
- From the **Dashboard Configuration**, you can create a new customize dashboard as per your requirement, for that click on the **+ New**.



- You need to insert the following details to customize the dashboard:
  - **Name**: Insert the relevant name for the Custom dashboard
  - **Entity Name**: Insert the Entity name.
  - **Query**: Insert the Query to customize the records.
- After inserting the details click on **Save** button.
- Now, navigate to the MappyField **Dashboards → MappyField 365 Custom Dashboard**.

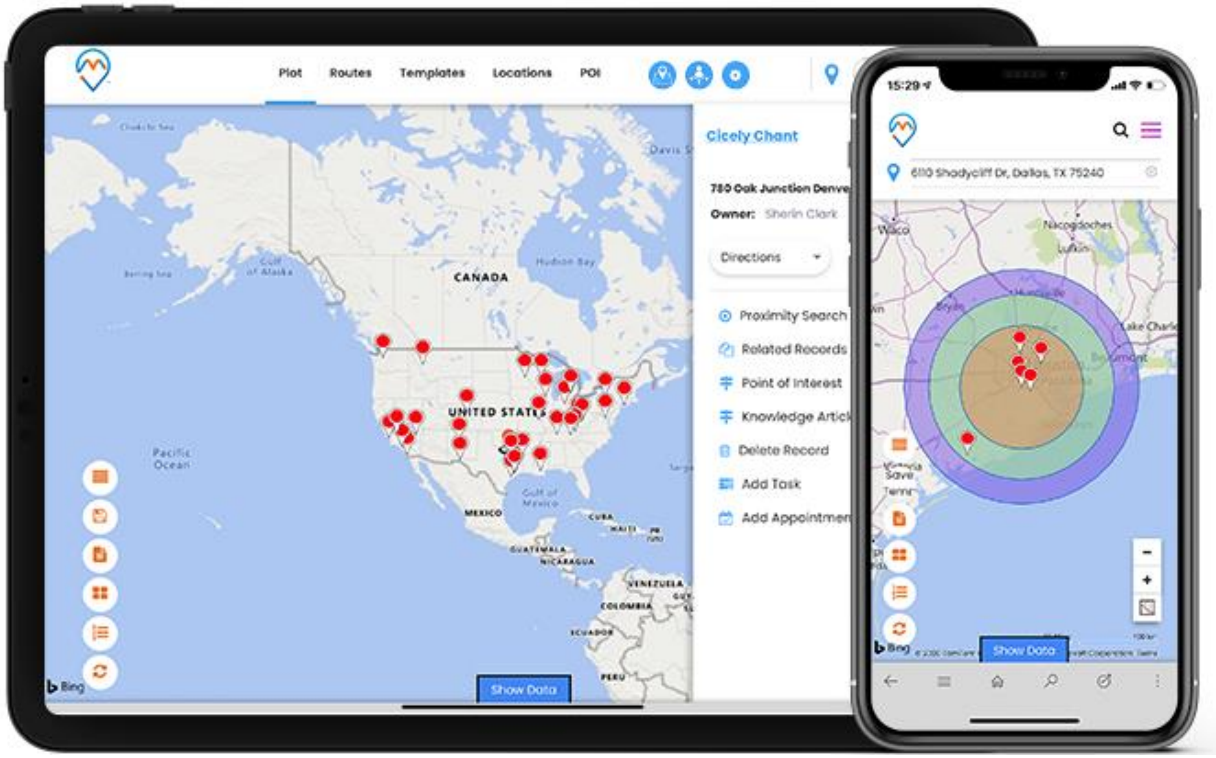


- By clicking on the **MappyField 365 Custom Dashboards**, you will get the Custom dashboard which you have configured.



Compatible With Mobile Devices

- **MappyField 365** plugin is compatible with **mobile** and **tablet devices**, so sales reps and marketing managers will have flexibility to access data from anywhere and everywhere.



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We simplify your business, offer unique business solution in digital web and IT landscapes.

Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: https://www.appjetty.com/dynamics365-mappyfield-365.htm and click on the Live Chat button for instant support.

Tickets

- Raise tickets for your specific question!
- Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for **Dynamics CRM MappyField 365**, please write to sales@appjetty.com