G appjelty

USER MANUAL



MappyField 365

"Installation & General Configuration"

Version: 6.0.0

Compatibility:

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

TABLE OF CONTENTS

Introduction
Prerequisites4
New changes4
Installation & Activation5
Installation Steps
Activate Your Free Trial7
Activation9
Insert License Key10
Setup for Admin11
Setup11
Live Tracking14
How to configure the Firebase?
Configure Languages
Assign User Role
User Wise Map Configuration22
Security Template Configuration25
Entity Mappings27
Attributes
Action Configuration29
Data Grid Attributes
Data Filter Attributes
Summary Card Configuration31
Views Configuration
Relationship Configuration
Tooltip Attributes Configuration
Enable Check-In
Auto Territory Assign
Geocode Records
Manually Geocode the Record
Non-Geocoded Records
Individual Records on Map View

MappyField 365 section in Record Details	39
View Map from Entity Menu	42
Contact Us	43

Introduction

AppJetty MappyField 365 plugin provides geo-analytical solutions to **Dynamics CRM** users and helps them to plot CRM data in maps. In this user manual, we have explained **installation**, **activation**, & **configuration** of the MappyField 365 plugin in the DynamicsCRM.

MappyField 365 Map view and its *Functionality* user manual is sperate. In that manual we have explained the features and functionality of the MappyField 365.

Prerequisites

Following requirement 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 regarding record owner 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

Installation & Activation

Installation Steps

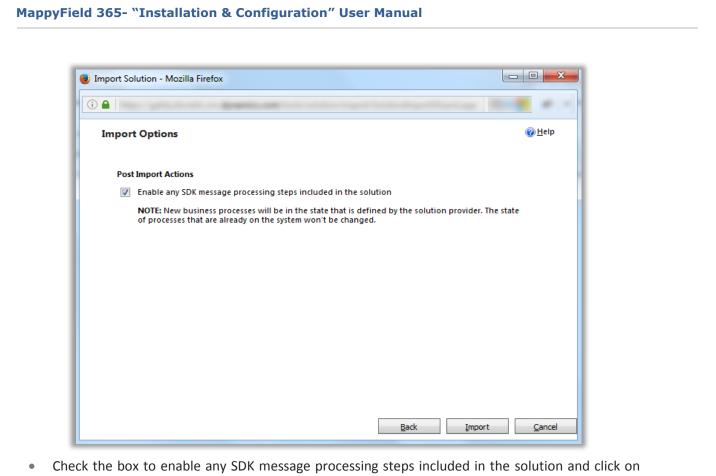
- > To install **'MappyField 365' plugin**, the following steps are to be followed:
 - On purchasing the plugin, you will get a zip file named "MappyField 365 365.zip".
 - Login into your CRM Account and click on Settings -> Solutions.

		Dyna	amic	s 36	65	~	Set	ting	S `	~	Solu	tions	>		
· ·			tions		<		🔊		🕻		N	lore Ac	tions 👻		
1	Vame				Disp	lay Na	ame		V€	ersion		Insta	lled On ↓	Package T	Publisher
r	nsdyr	_Powe	rAppsC	h	Pow	erApp	s Check	er B	1.	1.1.6			2/2/2020	Managed	Dynamics 365

- Click on 'Import' to upload and install the Solution.
- Click on **'Choose File'** button and choose the Package Zip File for **MappyField 365** from the Import Solution Window. Click on **'Next'** for further processing.

	Import Solution - Google Chrome	- 🗆 🗙
A		
Seleo	t Solution Package	() <u>H</u> elp
	Select the compressed (.zip or .cab) file that contains the solution you want to import and click Next. Choose File MappyField365_V6.0.zip	
	<u>B</u> ack <u>N</u> ext	<u>C</u> ancel

<u>Note</u>: You will get the MappyField 365 package zip in the main folder of the MappyField 365 and find the package in that folder. MappyField $365 \rightarrow$ MappyField $365_V6.0.2$ ip.



• Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.

mporting Soluti				1 He
mporting soluti	on			
1 The import of	solution : MappyField 3	65 completed succes	sfully.	
Date Time 🛧	Туре	Display Name	Name	
11:05:52.18	SDK Message Pr	Microsoft.Crm.S	Microsoft.Crm.S	"
11:05:52.07	Plugin Assembly	SamplePlugins	SamplePlugins	8
11:05:52.00	Client Extensions	ISV Config		3
11:05:52.00	Relationship Roles	Relationship Roles		3
11:05:46.64	Chart		salesorderdetail	3
11:05:46.64	Chart		sm_stocktracking	G -
• [*

• Click on 'Close' after successful completion message is displayed.

• Once you import the solution, it will be displayed in the solutions grid view.

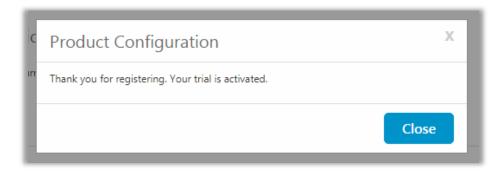
Dynamics 3	365 Settings 🗸	Solutions	>			
All Solutions ◄ ▶ ★ ₿ ₪	- 6 fii 🐺 🏂 💺	🚺 🍕 Mor	re Actions 👻			Sei
Name	Display Name	Version In	nstalled On \downarrow	Package T	Publisher	Description
MappyField365	MappyField 365	6.0.0.0	4/26/2021	Managed	AppJetty	MappyField 365 is a Dynamics CRM map visualiz
msdynce_AnyEntityRo	Entity records routing	9.1.20054	4/25/2021	Managed	Dynamics 365	Empower agents with routing experience for ent

Activate Your Free Trial

- Double click on 'MappyField 365' solution to configure the plugin with your license key.
- This will open up a new window. Click on 'Configuration' from the options provided on the left side.

Information ▲	G appjetty	Expire On:	Status: Unregistered
Configuration Components Components Components Components Configuration Con	Profile Activate Your Free Trial First Name* Renley Last Name* Email* renleysnow251@gmail.com For any queries, visit AppJetty Support Activate	Snow	

• You can activate your one-month free trial. To get a one-month free trial license key, fill out the details and click on **'Activate'** button.



ppyField 365- "Installation & Configuration" User Manual						
Your trial will get activated and expiry date will be displayed on top.						
🤂 αρρj	etty	Expires On: 5/26/2021	Status:			
Profile Setup Live 1	Tracking					
Purchase License Your free trial is currently a	e ctive. You can purchase the plugin anytime by clicking on the Buy Now	below button.				
License Details						
License Key: Your free trial will expire in 15 day(s)						

• You can purchase the licensed version any time. To purchase the license, click on **'Buy Now'** button.

MappyField 36	55- "Installation	&	Configuration"	User	Manual
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Activation

• On expiration of Trial, a message will appear that the Trial is expired.

License Deta	ils	
License Key:		Activate
	Your trial is expired.	
For any queries, visit	AppJetty Support	

- Now to purchase the license click on 'Activate' button.
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.

www.domain.com	
Plans Monthly	O Annual
Required users	
\$	Add to Cart

• On successfully completion of the purchase process, you will receive your license key via email along with steps to complete the license configuration.

Insert License Key

- Enter the New License key received in mail. This will enable the 'Activate' button.
- Click on 'Activate' button to activate your license.

Profile	Setup	
License	Details	
License Key	r:	
		The plugin has been activated and your next payment cycle will be initiated on 7/14/2018
any queries	, visit AppJet	ty Support
Manage Total allowe	Users ed license us	er: 1
Remaining	license user:	4
Delegated INTEGRATI Support U SYSTEM Mark Smit	ION ser	Yenki Tech

• Default settings under set up tab can be managed only if a user has **System Administrator Role**, **AppJetty MappyField 365 Admin**. Or else it would show error message stating "You don't have administrative rights. Please contact administrator."

Setup for Admin

Setup

- To manage the default configuration settings of MappyField 365, click on 'Setup' tab and enter default configurations.
- Admin user can set the default view of the map by configuring from here.

Solution Quick Maps Information 4 Configuration 4	🖸 appjetty
Components	Profile Setup
Option Sets Client Extensions Web Resources Processes + Plug-in Assemblies	 Bing Map Credentials Bing Map API Key*
Sdk Message Processin	or the e

• **Bing Map API Key**: Enter Bing map API key which you have generated from.

<u>Note</u>: To assist you further, you will find a link beneath the text box that states **How to generate Bing Map API Key**.

Solution: MappyField 365							
Solution MappyField 365		in a				Expires On:	Status:
🐉 Information 🔶	🕞 appjell	y y				5/26/2021	
Tonfiguration							
Components	Profile Setup Live	Fracking					
Entities		2					
Option Sets	Bing Map Credentials						
Client Extensions							
💽 Web Resources	Bing Map API Key* 🔞	summer of the second second					
nocesses					Н	ow to generate Bing M	ap API Key?
+ Plug-in Assemblies	Default Configurations				Set latitude	longitude and zoom le	vel by map
Sdk Message Processin	Default Configurations				oct lattade,		
Dashboards	Latitude	23		Longitude	71		
Dialog Boxes				-			
Reports	Zoom Level 🛜	3					
S Connection Roles							
Article Templates	Default Limits						
Contract Templates							
📮 Email Templates	Distance Unit	Kilometers	~	Direction	Shortest time		~
📴 Mail Merge Templates	Lloot Mon Cottings						
Security Roles	Heat Map Settings						
Field Security Profiles	High	-					
Routing Rule Sets Record Creation and U	-						
SLAs	Medium						
Model-driven Apps	Low						
Custom Controls							
🕞 Virtual Entity Data Prov	General						
Virtual Entity Data Sour							
Mobile Offline Profiles	Enable Live Traffic 📀						
Solution Component C	Optimize Route 😰	Π					
Solution Component R		\cup					
Organization Settings	Assign Territory 😢						
Setting Definitions							
🍓 Connection References 🍓 Help Pages	Save Cancel	Configure Languages					
Log neip Pages							

Default Configurations

- Under "Default Configuration" option, set default Latitude, Longitude and Zoom level for map when it is opened for the first time.
- You can set the default location using the map as well by clicking on "Set latitude, longitude and zoom level on map" option available on the right-hand corner.

Default Configurations		Set latitude, longitude and zoom level by map		
Latitude	23	Longitude	71	
Zoom Level 😢	3			

• By clicking on it, the map will open in new window. You can set the location by moving the icon as shown in below screenshot.



Default Limits

- Set "Default Limits" for distance unit and direction.
 - Distance Unit: Select to measure the distance in 'Kilometers' or 'Miles'.
 - Direction: Select the direction as per either 'Shortest Time' or 'Shortest Distance'.

Default Limits				
Distance Unit	Kilometers 🗸	Direction	Shortest time	~
Heat Map Settings	5			
High				
Medium				
Low				
General				
Enable Live Traffic ?				
Optimize Route 😢				
Assign Territory 🕜				
Save Can	cel Configure Languages			

General

- **Heat Map Settings**: You can also set colors for 'Heat Map' configuration which would indicate the intensity of the data. *i.e.* High, Medium, and Low.
- Enable Live Traffic: A user can also enable/disable Live traffic on Bing Maps and Optimize the route using SPF (Shortest Path First) feature from the configuration.
- **Optimize Route**: By enabling this option, the users will get the Routes based on the SPF algorithm.
- Assign Territory: By enabling this option, every time when you or the Dynamics users will create a new **Account** and a new **Lead**, the Territory is automatically assigned to those records.

<u>Note</u>: Assign Territory option is only for the **Account & Lead** entities. The territories assigned automatically if the territory is already created for that area when record is created.

Live Tracking

- You or a DynamicsCRM users can enable/disable the **Live User tracking** feature from configuration to track the CRM users (team members).
- You need to configure Firebase details for User's Live Tracking in MappyField 365:
 - > API Key > Database URL

> Storage Bucket

> Authentication Domain > Project ID

> Messaging Sender ID >	Location History
-------------------------	------------------

> APP ID

G appjetty		Expires On: 5/26/2021	Status:
Profile Setup Live Tracking			
Firebase Configurations			
Enable User Tracking 🛞 🛛 🔽			
API Key* 😢	Authentication Domain*		
Database URL* 🚱	Project ID* 😮		
Storage Bucket* 🕐	Messaging Sender ID*		
App ID* 🕐			
Location History			
Enter days 😧			
Save Cancel			

- Enter days: Enter days for which you want to get the history of the selected user's activity.
- After inserting the 'Firebase' configuration details for Live Tracking, click on the Save button.

<u>Note</u>: Firebase configuration is required to enable user tracking in MappyField 365. You need to register the project with the Firebase.

How to configure the Firebase?

 Home Recent 	~	
🖈 Pinned	\sim	
User Trackings		
Activity Tracking		Please configure firebase!
Resource Tracking		
Cocation History		
LU Live User Tracking	\diamond	

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

Firebase				Go to docs 🌲 D
2	Your Firebase projects			
	+ Add project	MappyField 365 mappyfield-365 >	FirebasechatTest fir-chattest-e1a6e	
	XamarinFCM xamarinfcm-cc996	AllinOneNotification allinonenotification		
	🛎 i05 🌐 marianacarbonell.co	🛎 i05 🌐 marianacarbonell.co		

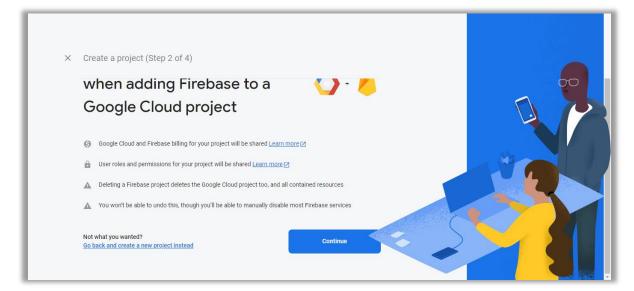
• Here you need to add a new project by clicking on the **+ Add project**.



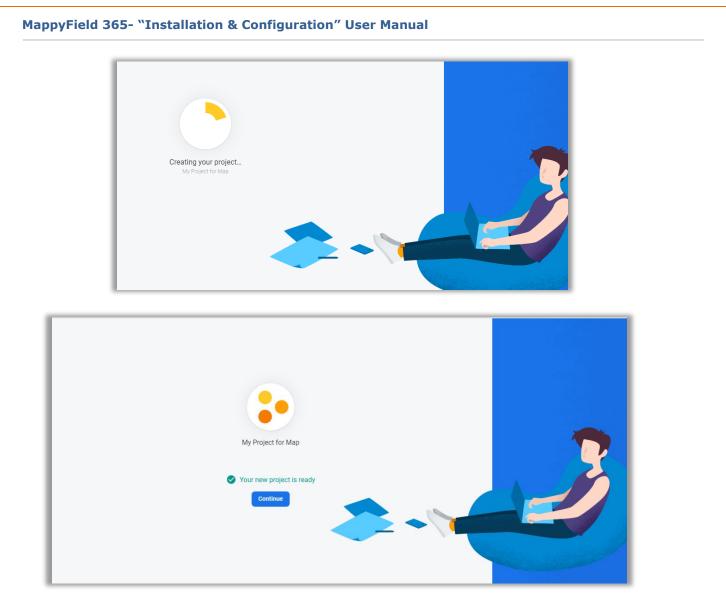
• Give a suitable name to your project and click on Continue to configure the details.



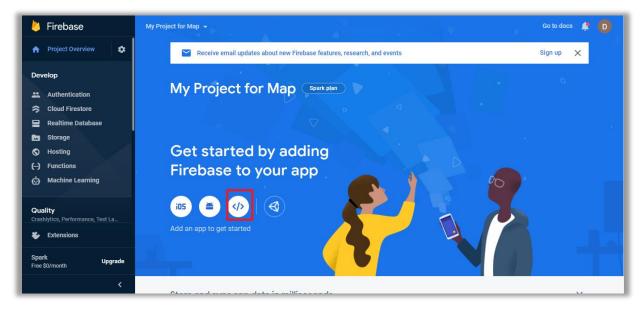
• In next, you will find the **"Add Firebase"**, click on that.



• 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.

1 Re	egister app	
Ap	p nickname 💿	
N	/ly App For Map	
	Also set up Firebase Hosting for this app. Learn more 2 Hosting can also be set up later. It's free to get started anytime.	
	Register app	
2 Ad	ld Firebase SDK	

• 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.

<pre><!-- The core Firebase JS SDK is always required and must be listed first <script src="https://www.gstatic.com/firebasejs/7.24.0/firebase-app.js"--><th></th></pre>	
<pre><!-- TODO: Add SDKs for Firebase products that you want to use https://firebase.google.com/docs/web/setup#available-libraries--></pre>	
<pre><script> // Your web app's Firebase configuration var firebaseConfig = { apiKey: "AIzaSyCthhHUg029dkhMAIayp0MvafZiZxjhjjI", authDomain: "my-project-for-map-279309.firebaseapp.com", databaseURL: "https://my-project-for-map-279309.irebaseio.com", projectId: "my-project-for-map-279309.appspot.com", messagingSenderId: "732506350282:web:06a0ade434623dfcc20a33" j; // Initialize Firebase firebase.initializeApp(firebaseConfig); </script> </pre>	
Continue to console	

- Click on Continue to console.
- In this way, by configuring the Firebase and inserting the Firebase details into the MappyField 365 configuration, you can enable the Live User tracking feature.

Configure Languages

• You can also configure language of your choice by clicking on **Configure Languages** button available on Setup page.

A Language Configuration	English - United States 🔹
Мар	Мара
Directions	Direcciones
Definitions	Definiciones
Locations	Ubicaciones
Configuration	Configuración
Search	Buscar
Clear	Claro

- Select the language from dropdown that you wish to configure your messages.
- Here, you need to add translations for the messages in the language of your choice.
- Click on **Save** button to save the language translations.

<u>Note</u>: To configure languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be listed for the MappyField 365.

• Go to Settings \rightarrow Administration \rightarrow Languages to enable/disable the languages.

iii D	ynamics 365 v Settings v Administration S.	AND	вох рэнд ех 💽
Admin	istration		
Which fe	ature would you like to work with?		
Ē	Announcements Create, edit, and delete announcements that appear in the Workplace area.	123	Auto-Numbering Specify the prefix numbers for contracts, cases, quotes, orders, articles, invoices, and campaigns. Select the suffix length for contracts, cases, quotes, orders, and invoices.
-	System Settings Set the format for various values, such as numbers, the calendar, and currency. Select the email tracking, marketing, and customization options for your organization. Set Microsoft Dynamics 365 for Outlook options. Manage report categories.	%	Languages Add or remove support for additional languages.
	Subscription Management See payment and billing options, and purchase additional licenses. You must be a member of an appropriate security role to do these tasks.		System Notifications View important system messages such as scheduled outage notifications.
	Resources In Use View details about your organization's use of storage, custom entities, and workflows and dialogs.	У÷	Yammer Configuration Connect Microsoft Dynamics 365 to your enterprise Yammer network
K .	Microsoft Social Engagement Configuration Connect Microsoft Dynamics 365 to Microsoft Social Engagement for Social Insights	C.	Virtual Entity Data Sources Add, edit, or delete connection information for external data sources used by virtual entities in the system.

	guage Settin		nization, and then click Apply.	? X
La	anguage ↑	Language Code	Status	Vers
	French	1036	Enabled	9.*
	Galician (Galician)	1110	Disabled	0.(
<	German	1031	Enabled	9.1

- You can enable or disable multiple languages from the list. After settings the language, click on the **Apply** button. This allows you to change languages in Microsoft Dynamics 365.
 - Click on the Settings gear icon at the top right of the screen, choose Options to open the Set Personal Options window.

م	\odot	+	\mathbf{Y}	٢	[?]	0
	Opt	ions				
	App	s for Dy	namics 36	5		
	See	Welcom	ne Screen			
	Abo	out				*
	Opt	Out of l	Learning P	ath		
	Priv	acy & Co	ookies			

• Go to the Languages tab, select your user interface language, then click **OK**.

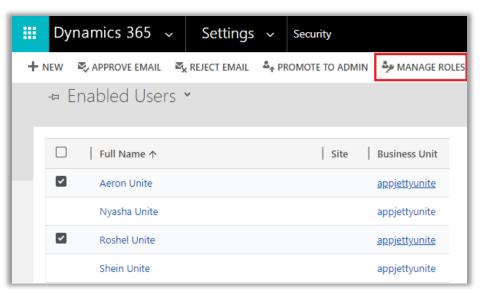
	Personal	- Contract		onalize Microsof	t Dynamics 365, a	and mai	nage you	r email temp	? olates.	×
General	Synchronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy	Languages		
	e language you pret change the display lar quage		for items suc			-				
	rface Language	Englis				•				
Help Lan		Englis			```	•				
							OK	Cano	el	

• Once you select the language here, that language will enable in the 'Configure Language' of MappyField 365 Setup.



Assign User Role

• To manage the user roles, navigate to **Settings -> Security -> Users.**



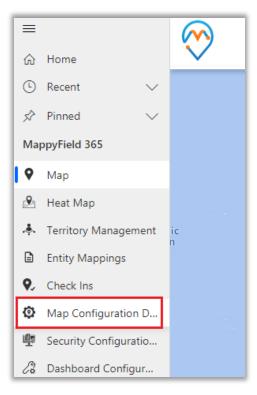
- Now select the users whose roles are to be managed and click on 'MANAGE ROLES.'
- This will open a pop up to select roles.

Manage User Roles What roles would you like to apply to the 2 Users you have selected?								
Role Name	Business Unit	*						
Activity Feeds	appjettymartinez							
AppJetty MappyField 365 Admin	appjettymartinez							
AppJetty MappyField 365 User	appjettymartinez							
CEO-Business Manager	appjettymartinez							
Common Data Service User	appjettymartinez							
CSR Manager	appjettymartinez							
	anniettymartinez	r						
As you assign security roles t and the ability to extract your d	o your users, you will enable access lata. Access is enabled through	. 1						
	65 for Outlook, Dynamics 365 for	_						
tablets web-user). You may adu	minister these access privileges by	•						
	OK Cance							

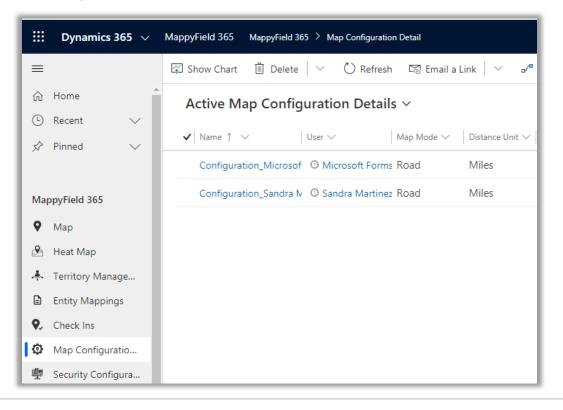
- The available roles for selection are **AppJetty MappyField 365 Admin** *or* **AppJetty MappyField 365 User** role.
- User with AppJetty MappyField 365 Admin role can perform all the actions like System administrator while user with AppJetty MappyField 365 User role can do all actions except delete actions.

User Wise Map Configuration

 On assignment of any role like AppJetty MappyField 365 Admin, AppJetty MappyField 365 User or System Administrator role, configuration settings record must be created. This can be accessed by navigating to Map Configuration.



 On navigating to MappyField 365 Configuration, it would show list of all the users with MappyField 365 role or System Administrator.



<u>Note</u>: These configurations are default user-based configurations that will be set as default when map is loaded.

- Following are the configurations:
- Map Mode: User can select default map mode. It can be road or aerial mode.
- Zoom Level: User can set default zoom level for the map. It can also be managed based on settings made from the contextual menu.
- Plot Data: Default plotting of data can be defined. Either it can be in cluster or non-cluster format.

MAP CONFIGURATION DETAIL : INFORMATION Configuration_Nyasha Unite =										
▲ General										
Name *	Configuration_Nyasha Unite	Owner *	🌡 Shein Unite							
Defaults										
Map Mode *	Road	Along The Route Distance								
Zoom Level	5	Along The Route Distance Unit	Miles							
Map Center	23,72	User	🔒 Nyasha Unite							
Plot Data *	Non Cluster	Security Template Configuration	Sales Reps Ø							
Distance Unit *	Miles	Navigate Via *	Google							
Route Option *	Shortest Time	Check In	No							
Default Location										
Default Origin										
Default Destination										

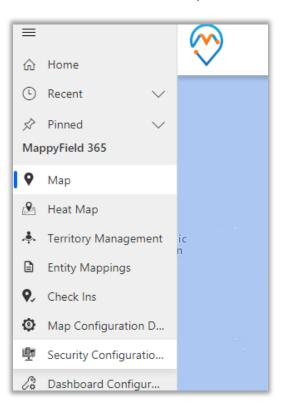
- Distance Unit: Default option for distance measuring. Either miles or kilometers.
- **Route Options**: You can define best way to determine route from this feature.
- Default Location: The user can define the default location using this option.
- Default Origin: The user can define the default origin using this option. It can also be managed based on settings made from the contextual menu.
- Default Destination: The user can define the default destination using this option. It can also be managed based on settings made from the contextual menu.
- Along the route distance: Define radius of along the route search.
- Along the route distance unit: Define default unit for along the route search.
- Security Template Configuration: Define the default 'Security Template' for the user if required.
 <u>Note</u>: Here the list of the Templates will appear as per the Security Template Configurations.

- **Navigate via**: Select navigate to check the routes by using Google Maps, Waze Map *or* Apple Map.
- Check In: Enable or disable the 'Check In' module. If you enable the Check In, Check In Radius (KM), the option will get enabled.
- Check in Radius: Define Geo Radius that can be allowed to perform any check in.

User	Shein Unite
Security Template Configuration	
Navigate Via *	Google
Check In	Yes
Check In Radius (KM) *	0.20

Security Template Configuration

- Only **System administrator** *or* **User** with **AppJetty MappyField 365 Admin role** can create Security Template for other CRM users with AppJetty MappyField 365 User role.
- User admin can assign selected actions to different users using security templates.
- To create a 'security template', navigate to **AppJetty -> Security Template Configuration**.
- Click on + New button from the action ribbon and enter template name and select all the actions that you want to make available for users with that template.



SECURITY CONFIGURATI	ON : INFORMATION		
General Templat	te ™≡		
Action Configura	ation		
Infobox Actions			
Select All Actions		Proximity Search	
Add To Origin		Related Records	
Add To Destination		Point Of Interest	
Send Email		Delete Record	
Assign Owner		Add Task	
Add To Marketing List		Add Appointment	
Bulk Actions			
Select All Bulk Actions	0	Copy Records	
Add To Route		Export To Excel	
Assign Owner		Export To PDF	
Add Task		Print Records	
Add Appointment		Add To Marketing List	2
Send Email		Point Of Interest	
Territory Management		Category	
Summary Card	Ø		
Active			B

Click on **Save** icon. Upon saving, it would enable Configuration Details section from where you can directly assign that template to a user.

Configuration Details								
								+ 🖩
Name ↑ User	Map Mode	Distance Unit	Route Option	Heat Map Type	Plot Data	Default Location	Zoom Level	
								Q
Configuration_Aeron Unite 1/27/2020 4:43 PM								
Configuration_Nyasha Unite 1/27/2020 4:43 PM								
Look Up More Records								

Entity Mappings

• Navigate to **AppJetty** -> **Entity Mappings** to display the entity with its relevant details on the MappyField 365. From here you can add a new entity and configure its required details.

	Dynamics 365	~	MappyField 365	MappyField 365 > Entity	Mappings
=			🛱 Show Chart	+ New 🗎 Delete	
ŵ	Home		Active Ma	ap Entity ~	
© ☆	Recent .	~ ~	✓ Entity Name	· ✓ │ Display Name ↑ ✓	
			account	Account	add
Map	opyField 365		appointme	nt Appointment	
•	Мар		incident	Case	add
۶	Heat Map		bzmap_che	eckin Check Ins	bzm
بة.	Territory Managemer	nt	contact	Contact	add
₽	Entity Mappings		lead	Lead	add
	Check Ins		opportunit	y Opportunity	add
© ف	Map Configuration D Security Configuratio		task	Task	
- So	Dashboard Configura	a			

• By clicking on Entity Mapping, the list of entities can be seen which are already mapped.

=	🛱 Show Chart 🕂	- New 🛍 Delete	∨ Č Refre	sh 🖾 Email a	a Link 🗸 🛛	√ª Flow ∨	💷 Run Report	∨ 🖬 Excel	Templates 🗸	Export to	Excel 🗸	:
 G Home (□) Recent ∨ 	Active Map	Entity ~		•						Search th	is view	٩
✓ Pinned ∨	\checkmark Entity Name \checkmark	Display Name 🏌 🗸	Street1 \checkmark	Street2 \checkmark	City 🗸	Postalcode \lor	State \checkmark	Country \checkmark	Latitude \checkmark	Longitude \checkmark	ls Linked \checkmark	Crea
	account	Account	address1_l	address1_l	address1	address1	address1_s	address1	address1_l	address1_l	No	10/6
MappyField 365	appointment	Appointment									No	10/6
Map	incident	Case	address1_l	address1_l	address1	address1	address1_s	address1	address1_l	address1_l	Yes	10/6
🖉 Heat Map	bzmap_checkir	Check Ins	bzmap_ad	bzmap_ad	bzmap_city	bzmap_po	bzmap_sta	bzmap_co	bzmap_ch	bzmap_ch	No	10/6
🐥 Territory Management	contact	Contact	address1_l	address1_l	address1	address1	address1_s	address1	address1_l	address1_l	No	10/6
Entity Mappings	lead	Lead	address1_l	address1_l	address1	address1	address1_s	address1	address1_l	address1_l	No	10/6
Q, Check Ins	opportunity	Opportunity	address1_l	address1_l	address1	address1	address1_s	address1	address1_l	address1_l	Yes	10/6
Map Configuration D	task	Task									No	10/6
n Security Configuratio												

- Click on "New" button, this will open a new window for mapping an entity.
- Entity Name: Select the entity you want to map. You can choose from all the entities that are present in the CRM by default or the custom entities created by you.
- **Link To:** Check the link to option to link the selected entity to some other entity. After checking the box, you will get a list of relationships with which you can link the selected entity.

	Entity to Map										
General					^						
Entity Name*	Account	Ŧ	Link To]							
Total Records	49		Geocoded Records	49							
Address Fields					^						
Street 1*	Address 1: Street 1	•	State/Province*	Address 1: State/Province	•						
Street 2*	Address 1: Street 2	•	Postal Code*	Address 1: ZIP/Postal Code	•						
City*	Address 1: City	•	Country*	Address 1: Country/Region	•						
Latitude*	Address 1: Latitude	•	Longitude*	Address 1: Longitude	•						
Automatically Geo	ocode New Records 🗹										

- Activity Entities work only on Account, Contact or Lead addresses marked as regarding address.
- Total Records: It displays how many records the entity contains.
- Geocoded Records: It displays how many records are geocoded.
- Address Fields: Select the address fields for the entity, to be used for geocoding. By default, it will consider map's certain address fields. If needed they can be changed.
- Automatically Geocode New Records: If it is checked, it geocodes the record automatically as per saving configuration.
- Once you have filled all details, click on "Save" button. Entity will be mapped, and success/failure message will be displayed.

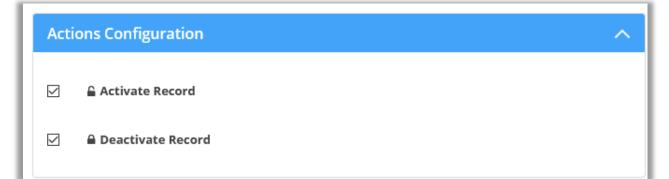
Attributes

Attributes			^
Detail Attributes ()	Owner	•	
Category Attributes	All selected (157)	•	

- For mapped entities, further configurations can be managed like **Attributes**. It includes **Detail Attributes** and **Category Attributes**.
- 'Detail attributes' are the ones that appear on card upon clicking on 'pushpin pointer' . At max 10 attributes can be selected.
- 'Category attributes' are the ones that appear in dropdown for 'category' selection. You can select as many attributes as you want for category selection.

Action Configuration

- For mapped entities, you can edit action configuration section where you can check/uncheck the action buttons according to your requirement.
- This will reflect on the tooltip card. Here, only those action buttons will be shown that can be changed. Default buttons will not be shown in this configuration section.



Data Grid Attributes

- From here, you can select the attributes for the **data grid**. When you plot any data in map *or* in heat map, grid data will be displayed according to attributes selected here.
- If 'Display Full Address' checkbox is checked in data grid, it will display records with full address.
- You can select maximum 8 data grid attributes.

Data Grid Attributes				^
☑ Display full address				
Attribute*	-	Attribute	Display Name	Action
		Account Name	Account Name	
Display Name*		Owner	Owner	×
	Add			

Data Filter Attributes

• Data Filter is provided on the Entity & its View record selection under the 'Plot' menu. You need to select the attributes to provide as Filter option. You can select maximum 8 data filter attributes.

Data Filter Attributes					^
Attribute*		•	Attribute Annual Revenue	Display Name Annual Revenue	Action ×
Display Name*			Account Name	Account Name	
	Add		Address 1: Country/Region	Address 1: Country/Region	×

• Select the required attributes for the Filter option from the Attribute drop down list and Insert the relevant name to be displayed.

Summary Card Configuration

- You can make configurations related to what you want to display on summary card.
- For summary card of an entity, you can choose the attributes that you want from the dropdown list.
- Also, under aggregate method, you can define the way you want records to be summarized. It can be either sum or average. Also, you may define display name of that attribute.
- By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.

Summary Card						^
Attribute*	-	•	Attribute Number of Employees	Display Name Number of Employees	Aggregate Method Sum	Action ×
Aggregate Method	Sum	•	Annual Revenue	Annual Revenue	Sum	×
Display Name*						
	Add					

Views Configuration

• You can select the view that you want to display on the map for particular entity.

Vie	Views Configuration					
	Views	View Type				
	My Active Accounts	System View				
	Active Accounts	System View				
	Inactive Accounts	System View				
	Selected Accounts Campaigns	System View				
	Accounts I Follow	System View				
	Accounts Being Followed	System View				
	Accounts: Responded to Campaigns in Last 6 Months	System View				
	All Accounts	System View				
	My Connections	System View				
	Accounts: No Orders in Last 6 Months	System View				
	All Accounts (not available)	System View				
	Accounts: Influenced Deals That We Won	System View				

Relationship Configuration

- The selected relationship id from the Relation List and the name gets plotted as part of related records associated with a record.
- In 'Relationship Configuration', Default Relationship 'radio button' is given to display the Default relationship at the time of loading the record map.

Relationship Configuration					1
	Relationship List	Relation Schema	Relationship Id	Default Relationship 🔞	
	account - principalobjectattributeaccess	account_principalobjectattributeaccess	objectid	0	
	account - fax	Account_Faxes	regardingobjectid	0	
	account - slakpiinstance	slakpiinstance_account	regarding	0	
	account - postfollow	account_PostFollows	regardingobjectid	0	
	account - postregarding	account_PostRegardings	regardingobjectid	0	
	account - postrole	account_PostRoles	regardingobjectid	0	

Tooltip Attributes Configuration

Tooltip Attributes					^
Attribute*	-	•	Attribute Account Name	Display Name Account Name	Action
Display Name*			Owner	Owner	×
	Add				

- You can make configurations related to what you want to display on 'tool tip' when anyone hovers on that record.
- For that, you can choose the attributes that you want from the dropdown list. You may also define display name of that attribute. By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.
- After making all the configurations, click on Update button to complete the process.

Enable Check-In

- You will get Check-In & Check Out options for all activity entities along with Add Notes and Attachment options.
- To enable the **Check In** option for the activities like etc., tick the **Enable Check In** option.

		Entity to Map	
General			^
Entity Name*	Appointment	▼ Enable Check In	

• By checking it, you will get the Check-In & Check-Out features for your activity.

Auto Territory Assign

• You or DynamicsCRM users can assign territory for existing record. It will automatically select the Territory based on the region

iii Dynamics 365	Dynamics 365 — custom			ନ ଓ ନ + ନ 💩
=	🔶 🖾 Show Chart 🖉 Edit 📑 Activate	🖒 Deactivate 🛛 🗐 Delete 🗸 🐥	Assign Territory 🎽 Merge 🖁 Oper	n Org Chart 🛛 🖗 Geo Code 🗄
☆ Home	My Active Accounts ~			abla Search this view $ ho$
 ● Recent ∨ ✓ Pinned ∨ 	✓ Account Name ↑ ∨	Main Phone 🗸 🛛 🗛	Address 1: City \lor Primary Contact \lor	Email (Primary Contact) 🗸
	✓ Hi Tech Hydraulic Solutions	A	Arlington Adrienne McMilla	n r
My Work	Testure	A	Ahmedabad	
াল Dashboards		N	Napa Co	
Activities	Transform To		tradition	
Customers	Testimonet		ingen fan	
Accounts	Number 14		traided	
A Contacts			tep (a	
Sales	Turker Is		tradulat	

- By selecting any account record, you will get an option as Assign Territory on header (ribbon).
- Click on Assign Territory option to select the territory for the selected record. The territory as per the record's location/region will be selected.

Dynamio ←	zs 365 — custom ㈜ Show Chart 🥒 Edit 📑 Activ	map2604.crm.dynamics.com says Assign Territory is in process and will continue in bac	:kground. ОК	오 ♂ Merge 뿝 Open Org Chart	
Ň	My Active Accounts ~	Main Phone 🗸	Address 1: City ∨	Primary Contact ∨	∑ Search this view ▶ Email (Primary Contact) ∨
· ·			Arlington	Adrienne McMillan	in an entities contact)
			Ahmedabad		

Geocode Records

Manually Geocode the Record

• Navigate to the record for which you want to manually set a geocode: Latitude & Longitude.

III Dynamics 365 $ imes $	Sales > Accounts			\$ Q	የ 🕂 🕁 🌚 ?
=	🛱 Show Chart 🕂 New 📋 Delete 🗸	🕈 Map 🛛 Beat Map 🛛 🤗 Get Geo	Code 🍳 Non-Geocode	d Records 🕐 Refresh 🖙 Er	mail a Link \vee 🛛 :
 G Home C Recent ∨ 	^ My Active Accounts \sim				
Pinned ∨	✓ Account Name ↑ ∨	Main Phone \checkmark	Address 1: City \smallsetminus	Primary Contact \sim	Email (Primary Contact) 🗸
~	Atlanta Rantoull		New Orleans		
My Work	Blancha Franciottoi		Milwaukee		
# Dashboards	Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
Activities	Brian Young		San Miguel Co.		
Customers	Charline Davis		El Paso		
Accounts	Christiana Limpkin		Nashville		
A Contacts	Cicely Chant		Denver		
Sales	City Power & Light (sample)	555-0155	Redmond	Scott Konersmann (sample)	someone_f@example.com

• You will get the Geocode as per your selection of view. Here you get the Geocode for "My Active Accounts". If you have not selected any record, it will get Geocode for all the Records.

Ex. If you want to geocode any record of account, go to **Sales -> Accounts** and select a record.

	Dynamics 365 🗸 Sales > Accounts > Atlanta Rantoull	
=	⊙ 🖬 Save 🖁 Save & Close + New 🛱 Open Org	Chart 🔓 Deactiv
ŵ	Atlanta Rantoull	
	Account · Account ~	
Ż	Summary Details MappyField 365 Related	
8	Website	
Ç		
!	Parent Account	
R		
B	Ticker Symbol	
ß	Address 1: Latitude 30.01042	
٢		
ß	Address 1: Longitude	
R	A Geo Confidence	
\$7		
0	Territory	
Ł		
	Territory Code	
-F-m	Default Value	

- After selecting a record and clicking on Get Geocode, the "Latitude" & "Longitude" will get updated as per the address details.
- If you check, the account details, the Geocode: Latitude & Longitude is updated as shown in the screenshot.

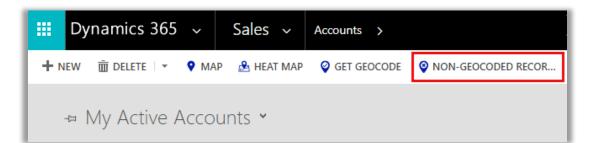
<u>Note</u>: You get option to geocode records only when that particular entity is **mapped** from Entity Mappings configuration.

MappyField 365- "Installatio	on & Configur	ation" Use	r Manual				
⊙ 🖬 Save 🛱 Save & Close + New 🖧 Open	Org Chart 🛛 🔂 Deactivate	^P R Connect ∨ ≔	+ Add to Marketing List	옥, Assign	ର୍ଷ୍ଟେ Email a Link	🗊 Delete 🔇	Get GeoCode
Atlanta Rantoull					 Annual Revenue	 No. of Employe	Sherin Clark Owner
Summary Details MappyField 365 Related					RECENT CASES	لــــــا No data availa	able.
Parent Account Ticker Symbol						No data availa	able.
Address 1: Latitude 30.01042					Entitlements		:
Address 1: Longitude -90.10709						No data availa	able.
☐ Geo Confidence Territory							

• If you changed the address, then you need to manually geocode that record by clicking on the "Get Geocode" button from the menu.

Non-Geocoded Records

- Navigate to the entity for which you want to get a non-geocode detail.
- For example, if you want to check the Non-Geo Coded records from the multiple records of an account entity, go to **Sales -> Account**.



- Click on **Non-Geocoded Record** button, it would show listing of all the non-geocoded records along with their address.
- You can also view details of the record by clicking on view icon 👁 under action column.

MappyField 365- "Installation & Configuration" User Manual Non-Geocoded Records 🖨 Print Search: Full Name • Address ÷ Action Avie Norgate 82067 Independence Junction Pas Pul 0 Boot Moralas 90434 Washington Terrace Ordos 0 Dorie Beckles 04 Schurz Parkway Hengfan 0 Eleanora Jervoise 540 Carey Lane Putun 0 0657 Longview Place Krajan Kedungsalam Flem Humpherson 0 Gawain Moorman 571 Myrtle Avenue Olejet 0 Nannie Fargher 2694 Pond Center Son Trà 0 Pall Curl 405 Dwight Street Bojonggaling 0

• For the list generated, you can also perform actions like **Copy, Excel, Pdf, Print** and **Search** as well.

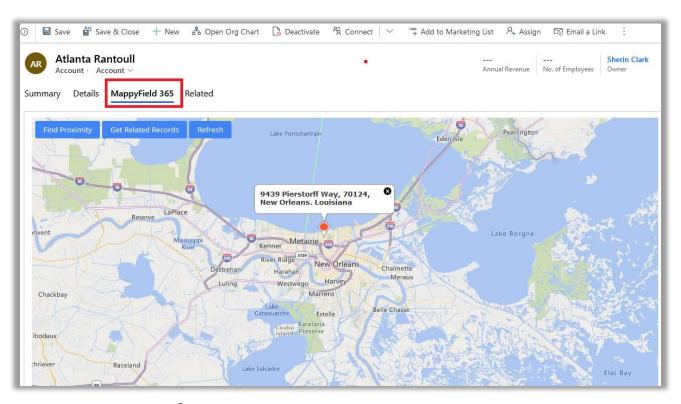
Individual Records on Map View

MappyField 365 section in Record Details

- MappyField 365 is separately provided in the **Details** page of any record of all the mapped entities.
- Click on any record of account entity.

III Dynamics 365 V Sales > Accounts				
=	🛱 Show Chart 🕂 New 🛍 Delete 🗸	🕈 Map 🛛 Heat Map 🛛 🤗 Get GeoCo	de 🛛 🍳 Non-Geocoded	
合 Home ^个	My Active Accounts \sim			
🕒 Recent 🗸 🗸				
🖈 Pinned 🗸 🗸	✓ Account Name ↑ ∨	Main Phone 🗸	Address 1: City 🗸	
~	Atlanta Rantoull		New Orleans	
My Work	Blancha Franciottoi		Milwaukee	
👼 Dashboards	Blue Yonder Airlines (sample)	555-0154	Los Angeles	
🖄 Activities	Brian Young		San Miguel Co.	
Customers	Charline Davis		El Paso	
Accounts	Christiana Limpkin		Nashville	
R Contacts	Cicely Chant		Denver	
Sales	City Power & Light (sample)	555-0155	Redmond	

• By clicking on the account name, you will get the summary and the details of that account and by scrolling down, you will get the separate 'MappyField 365' section.



- On map there is a pin \mathbf{P} plotted based on the address entered for the record.
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving, it would prompt a confirmation message. Click **OK** to update and continue.
- You can update latitude and longitude using record map for records of Account, Contact and Lead Entities.
- Along with that there are three action buttons: **Proximity**, **Get Related Records** and **Refresh**.
- **Find Proximity**: Clicking on it, you can perform proximity search from that pin and find records nearby. It would show records based on entity selected from the dropdown.

Find Proximity Get Related R Sugarland Run Sterling	Refresh skville Aspen Hill seve Wheaton Potomac	295 G. Meade Military Reservation	Severna Park River Severn River Arnold
Hernd	Proximity Search	×	665 Annapolis South River
28 Chantilly	Select Entity		1 All
Sudley Springs Centreville	Distance Time		S dies
Springs Centreville West Gate Of (234) Lomond	Enter val Enter val Enter val	Kilometers 🗸 🗸	1 3
Linton Hall Manassas Park Manassas	Search		Deale Beach
Widlidssas	Belvoir		Friendship +
	Lake Ridge Military Fort Washin Woodbridge	gton	Chesapeake Beach
Bing	Dale City		5 Miles 10 kn © 2019 HERE, © 2020 Microsoft Corporation Term

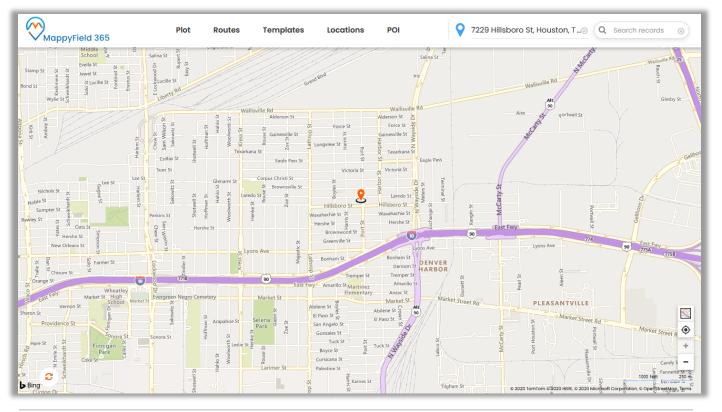
- **Get Related Records:** This action button would fetch all related records to the plotted pin based on relationship set from the configurations section.
- **Refresh**: This button would just refresh the map to default map type removing any action performed on map.

View Map from Entity Menu

- The map options are provided in all the entities on the header.
- You can access the **PMap** and **W** Heat Map from the Entity.

🖾 Show Chart 🕂 New 🛍 Delete 🗸 오 Map	🙆 Heat Map 🛛 🖗 Get Ge	oCode 🛛 😵 Non-Geocoded R
My Active Accounts \sim		
✓ Account Name ↑ ∨	Main Phone \vee	Address 1: City \smallsetminus
Atlanta Rantoull		New Orleans
Blancha Franciottoi		Milwaukee
Blue Yonder Airlines (sample)	555-0154	Los Angeles
Brian Young		San Miguel Co.
Charline Davis		El Paso
Christiana Limpkin		Nashville
Cicely Chant		Denver

• By clicking on 'Map' or 'Heat Map', you will be redirected to the details of the Maps for that particular entity.



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



- Raise tickets for your specific question!
- Send an email to <u>support@appjetty.com</u> or you can login to your account @ <u>www.appjetty.com</u> 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 <u>sales@appjetty.com</u>