

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	4
Prerequisites	4
New changes	4
Installation & Activation	5
Installation Steps	5
Activate Your Free Trial	7
Activation.....	9
Insert License Key	10
Setup for Admin.....	11
Setup.....	11
Live Tracking	14
How to configure the Firebase?	15
Configure Languages	19
Assign User Role	21
User Wise Map Configuration	22
Security Template Configuration.....	25
Entity Mappings.....	27
Attributes.....	29
Action Configuration	29
Data Grid Attributes	30
Data Filter Attributes	30
Summary Card Configuration	31
Views Configuration	32
Relationship Configuration.....	33
Tooltip Attributes Configuration	33
Enable Check-In	34
Auto Territory Assign	35
Geocode Records.....	36
Manually Geocode the Record	36
Non-Geocoded Records.....	37
Individual Records on Map View	39

MappyField 365 section in Record Details39

View Map from Entity Menu42

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

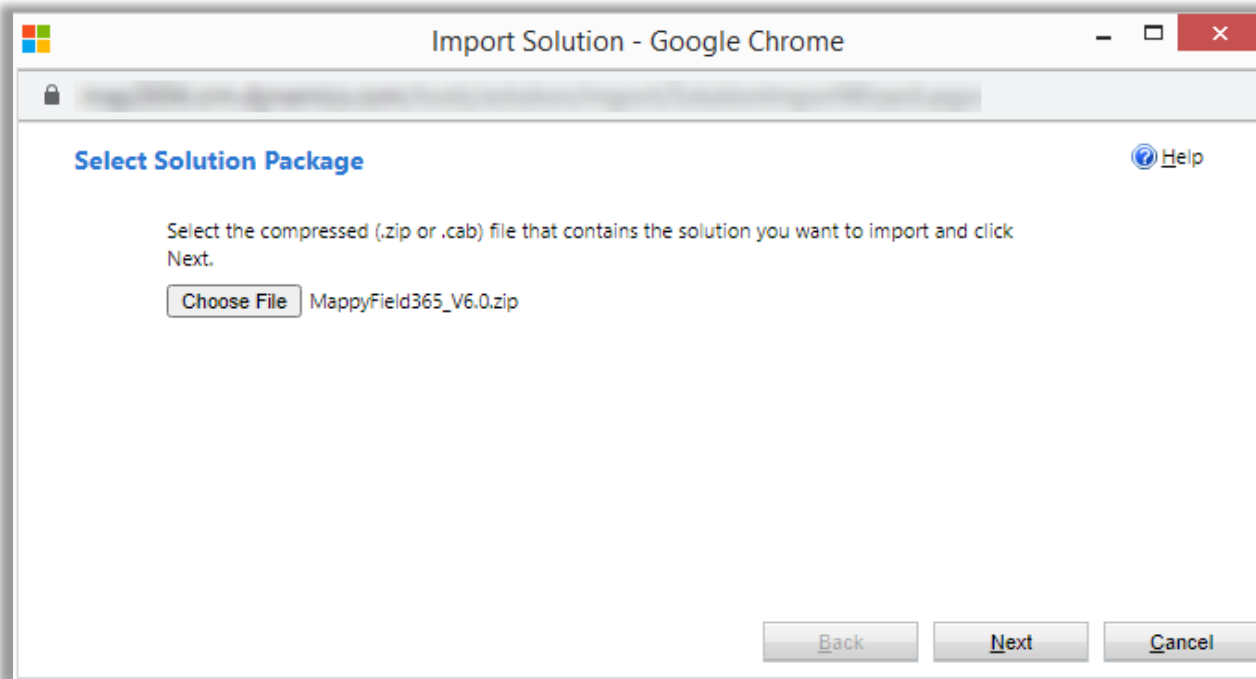
Installation & Activation

Installation Steps

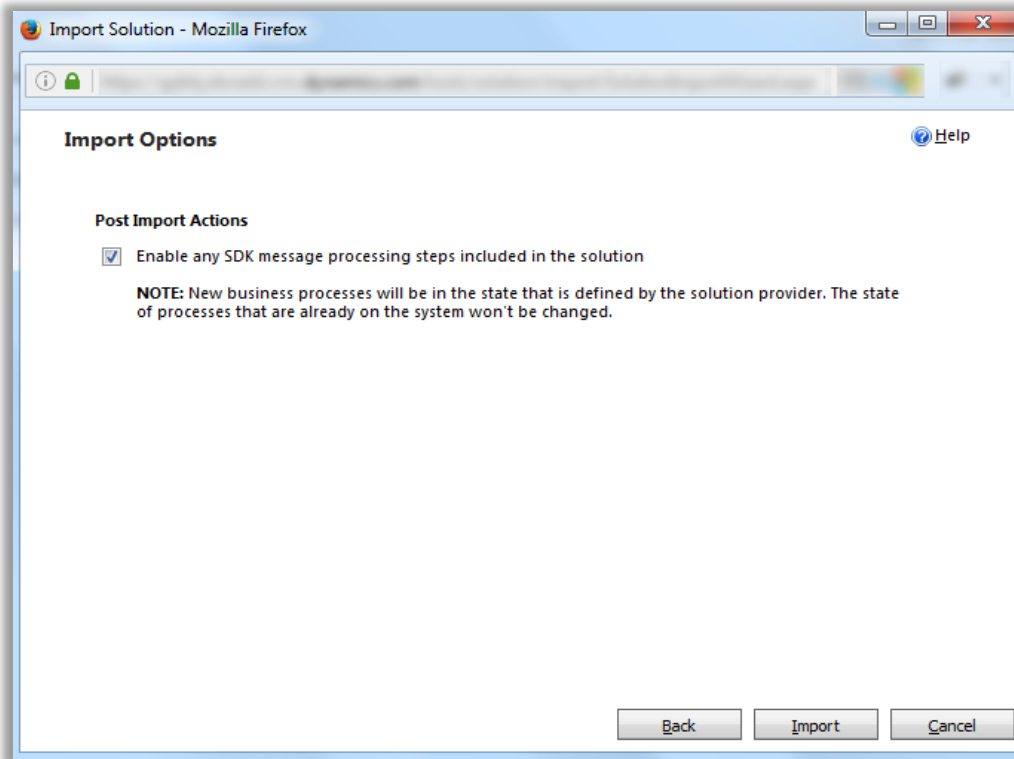
- To install 'MappyField 365' plugin, the following steps are to be followed:
 - On purchasing the plugin, you will get a zip file named "MappyField 365 365.zip".
 - Login into your CRM Account and click on **Settings -> Solutions**.



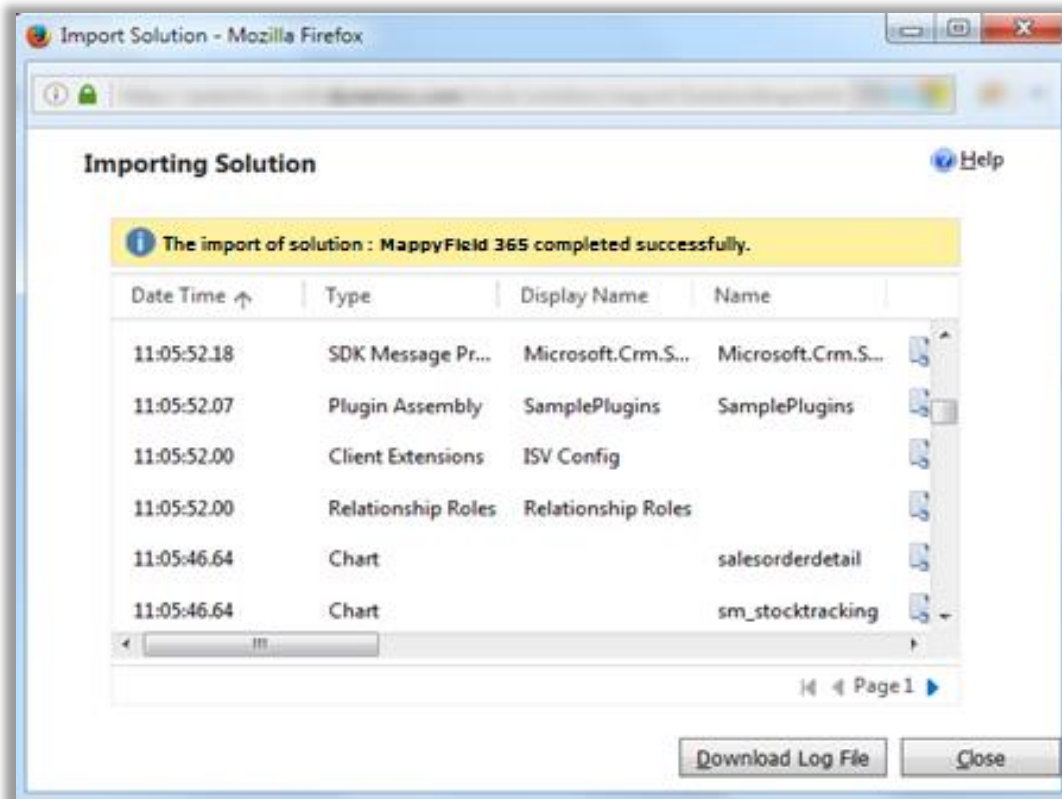
- Click on 'Import' to upload and install the Solution.
- Click on 'Choose File' button and choose the Package Zip File for MappyField 365 from the Import Solution Window. Click on 'Next' for further processing.



Note: 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 → MappyField 365_V6.0.Zip.



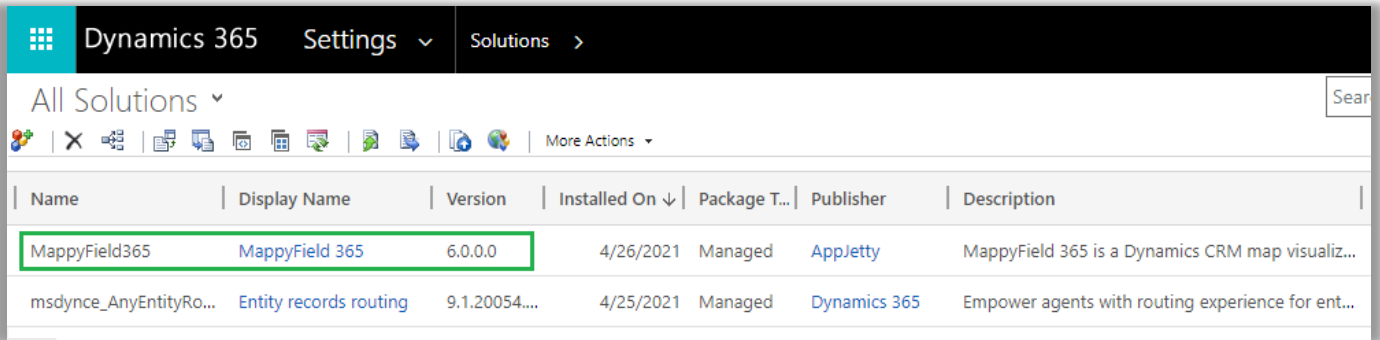
- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.



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

MappyField 365- "Installation & Configuration" User Manual

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



Name	Display Name	Version	Installed On	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...

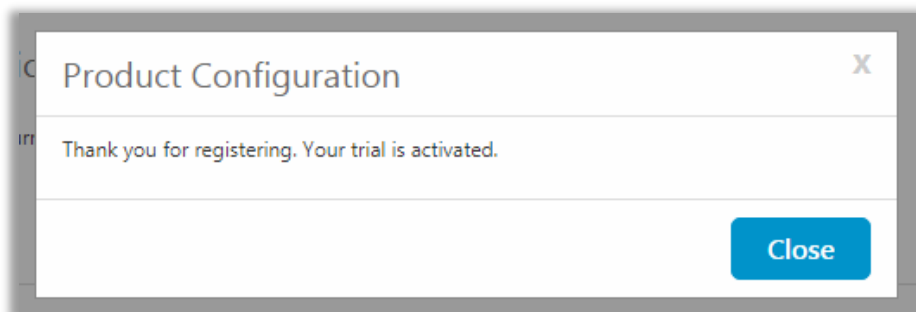
Activate Your Free Trial

- 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.



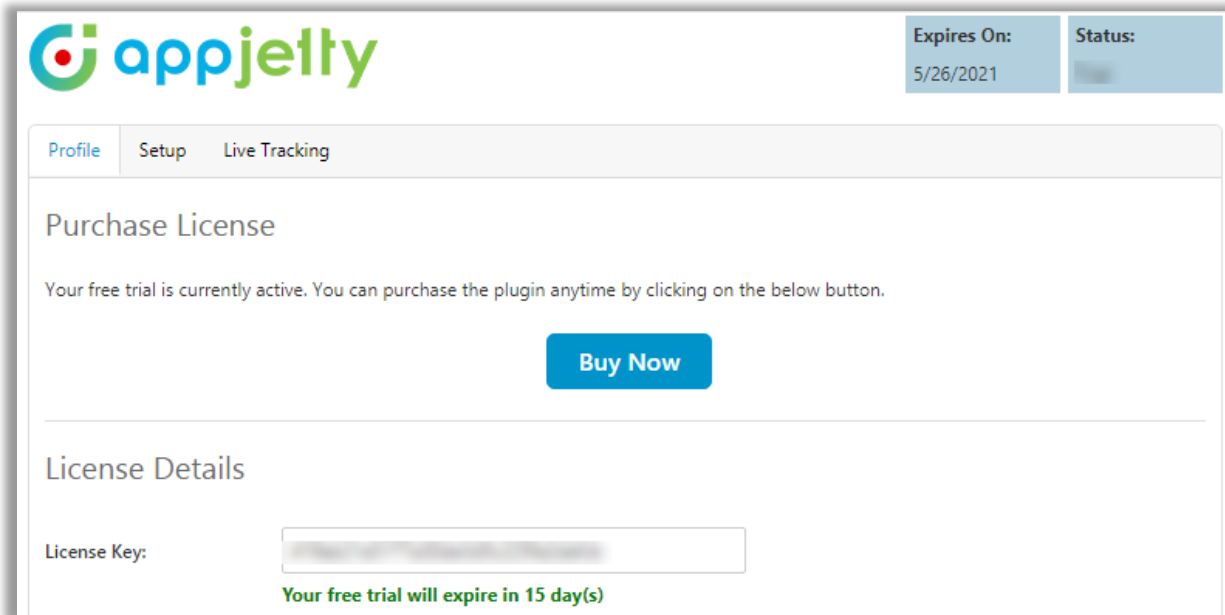
The screenshot shows the AppJetty configuration interface. On the left is a navigation tree with 'Configuration' selected. The main area displays the AppJetty logo, an 'Expire On' field, and a 'Status: Unregistered' indicator. Below this is a 'Profile' section with the title 'Activate Your Free Trial'. It contains three input fields: 'First Name*' with the value 'Renley', 'Last Name*' with the value 'Snow', and 'Email*' with the value 'renleysnow251@gmail.com'. A link for 'AppJetty Support' is provided. At the bottom is a blue 'Activate' button.

- 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.



The screenshot shows a dialog box titled 'Product Configuration' with a close button (X) in the top right corner. The message inside reads: 'Thank you for registering. Your trial is activated.' At the bottom right of the dialog is a blue 'Close' button.

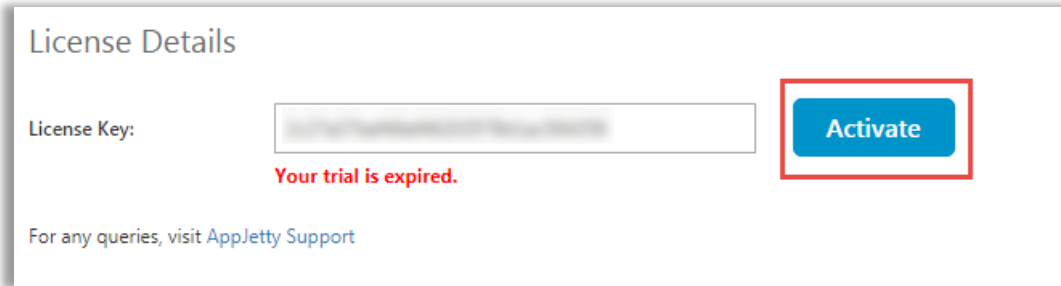
- Your trial will get activated and expiry date will be displayed on top.



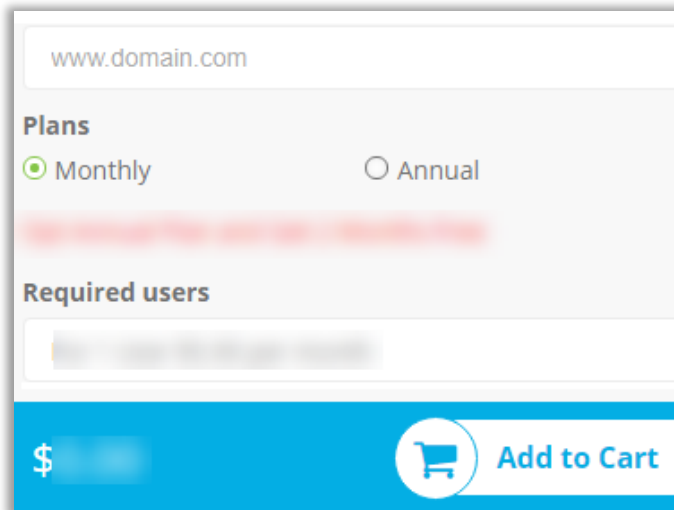
- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.

Activation

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



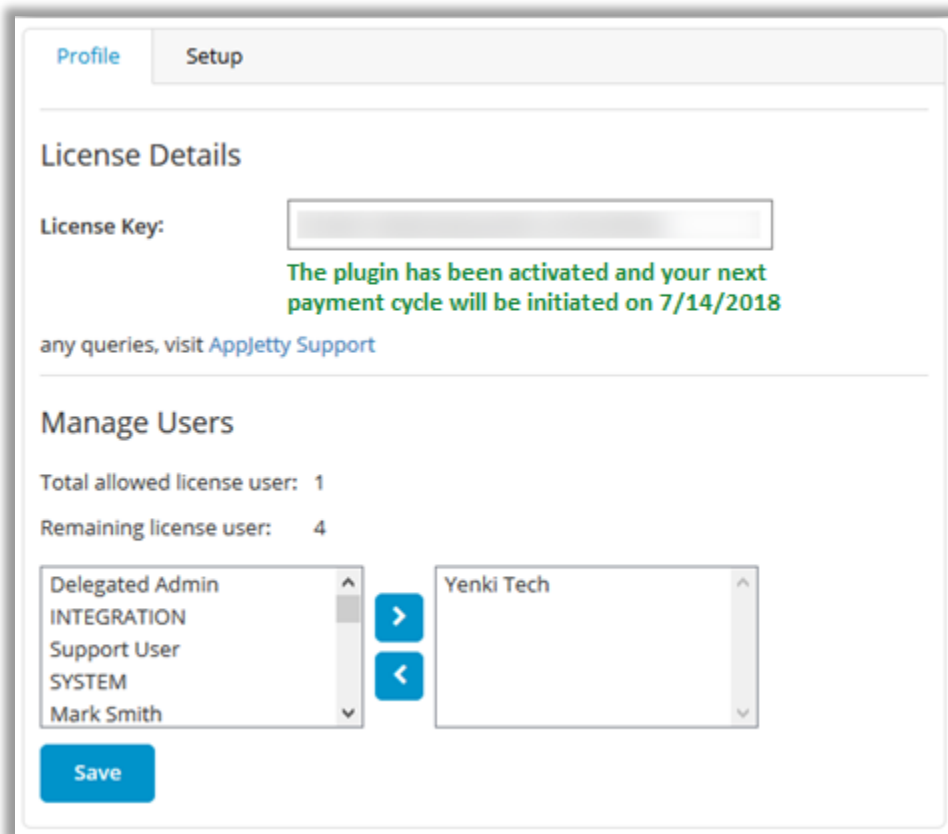
- Now to purchase the license click on '**Activate**' button.
- This will redirect you to our product page and a pop-up will appear. Click on '**Add to Cart**' button and complete the purchase process.



- 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.

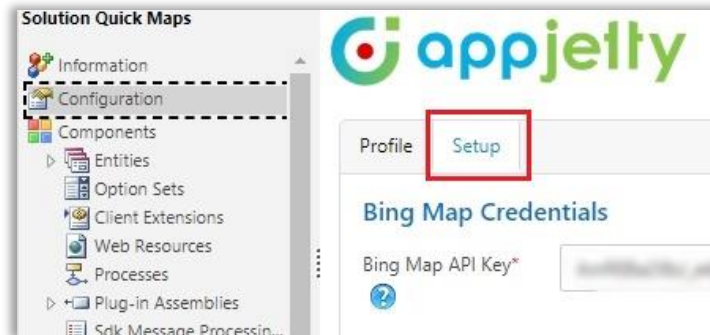


- Default settings under set up tab can be managed only if a user has **System Administrator Role, AppJetty MappyField 365 Admin**. Or else it would show error message stating "You don't have administrative rights. Please contact administrator."

Setup for Admin

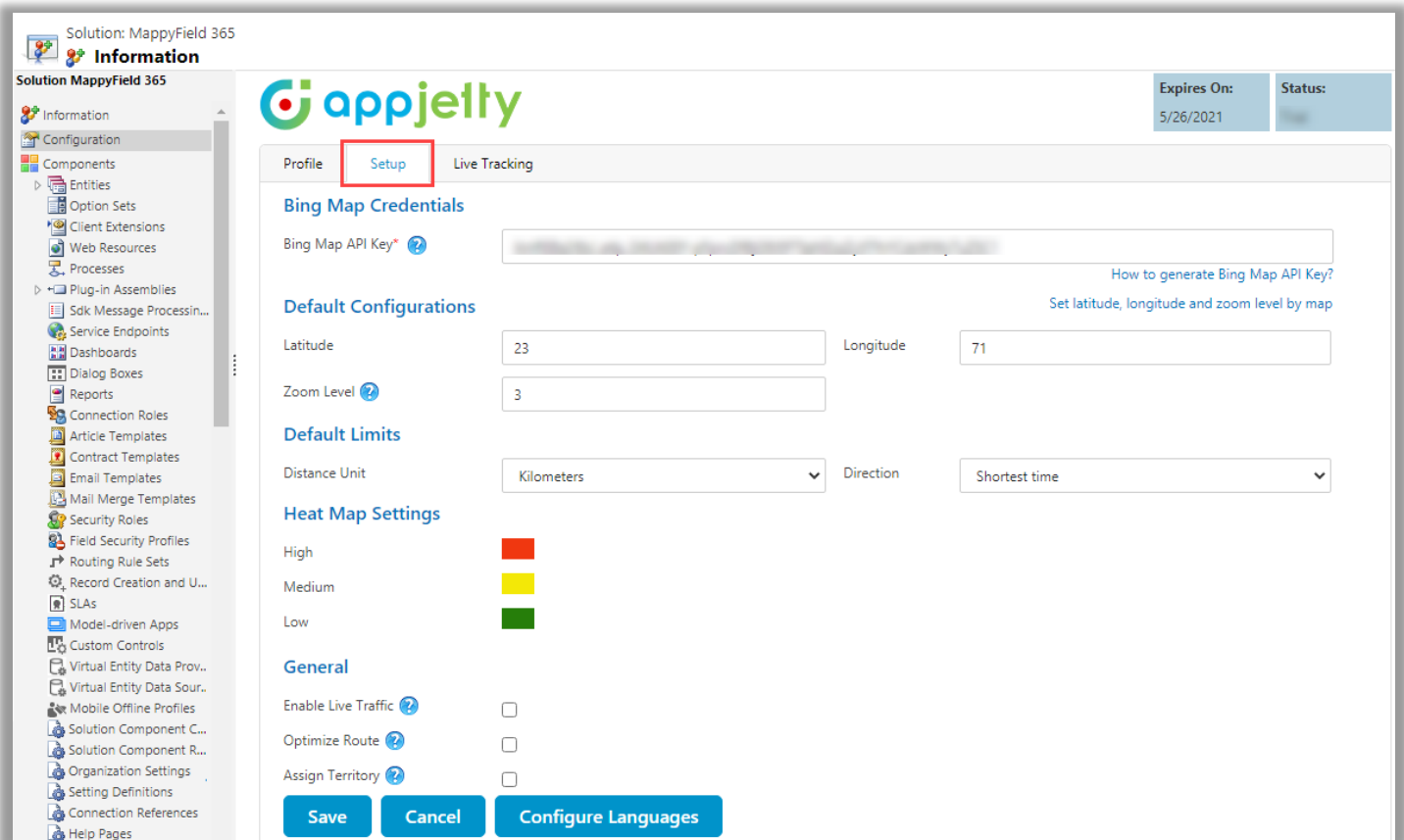
Setup

- 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.



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

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




Default Configurations

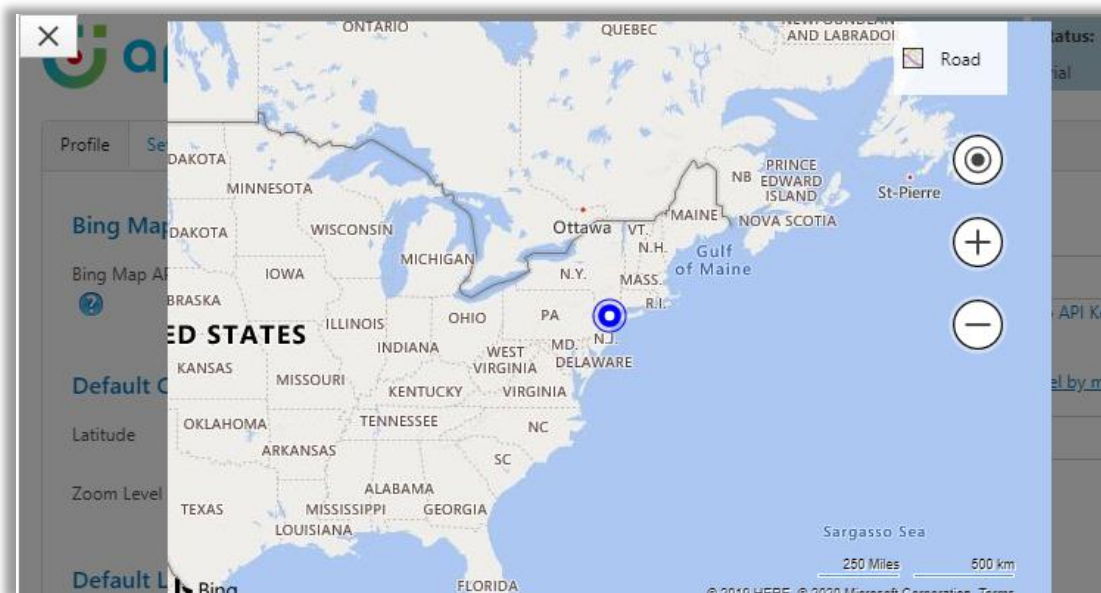
- Under "Default Configuration" option, set default **Latitude**, **Longitude** and **Zoom** level for map when it is opened for the first time.
- You can set the default location using the map as well by clicking on "**Set latitude, longitude and zoom level on map**" option available on the right-hand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

Default Configurations

[Set latitude, longitude and zoom level by map](#)

Latitude	<input type="text" value="23"/>	Longitude	<input type="text" value="71"/>
Zoom Level 	<input type="text" value="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'.

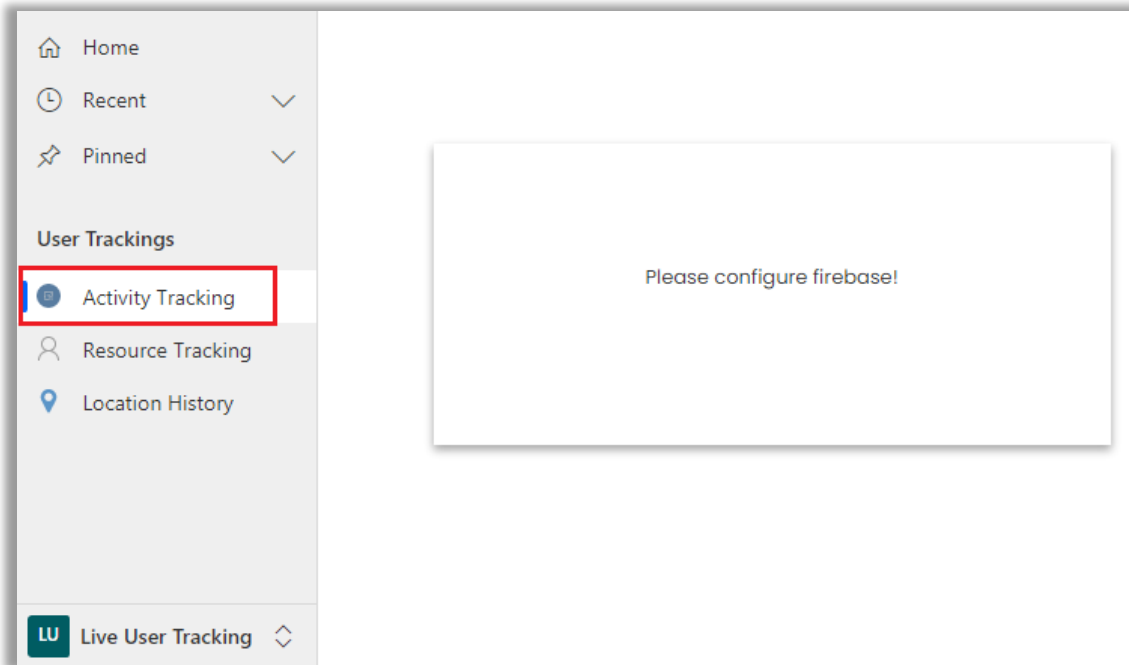
The screenshot shows a configuration window titled "Default Limits". It contains two dropdown menus: "Distance Unit" set to "Kilometers" and "Direction" set to "Shortest time". Below this is a "Heat Map Settings" section with three color-coded options: "High" (red), "Medium" (yellow), and "Low" (green). Underneath is a "General" section with three checkboxes: "Enable Live Traffic", "Optimize Route", and "Assign Territory", all of which are currently unchecked. At the bottom of the window are three buttons: "Save", "Cancel", and "Configure Languages".

General

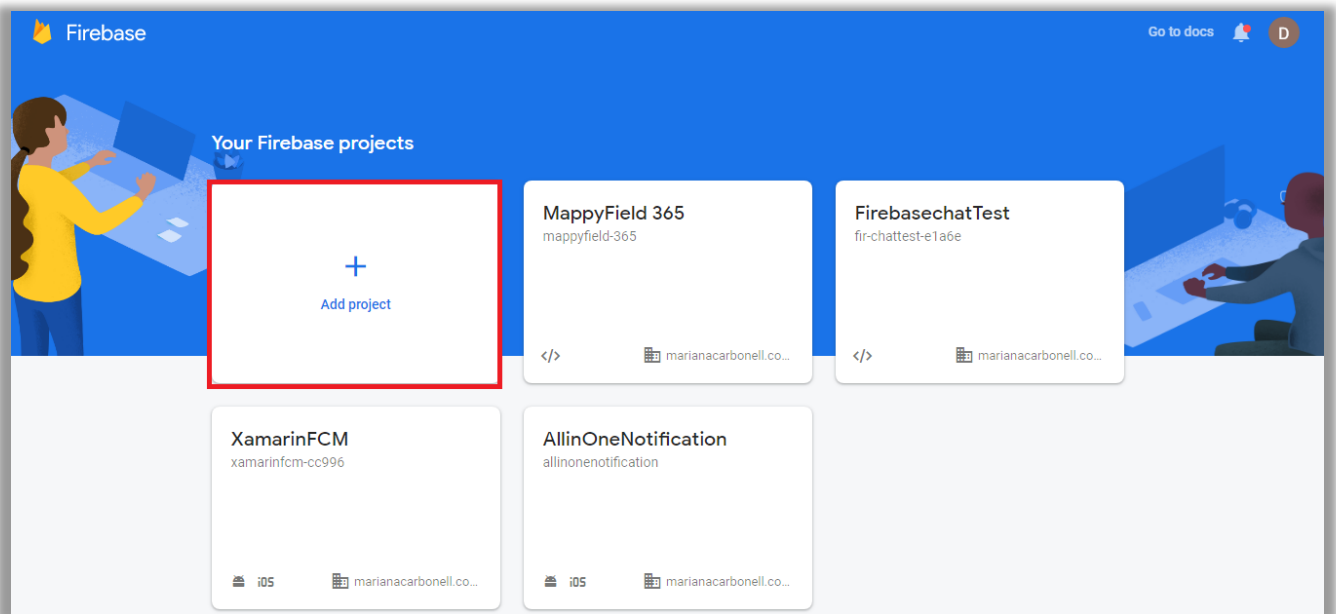
- **Heat Map Settings:** You can also set colors for 'Heat Map' configuration which would indicate the intensity of the data. *i.e.* **High**, **Medium**, and **Low**.
- **Enable Live Traffic:** A user can also enable/disable **Live traffic** on Bing Maps and **Optimize** the route using SPF (Shortest 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.

Note: 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.

How to configure the Firebase?

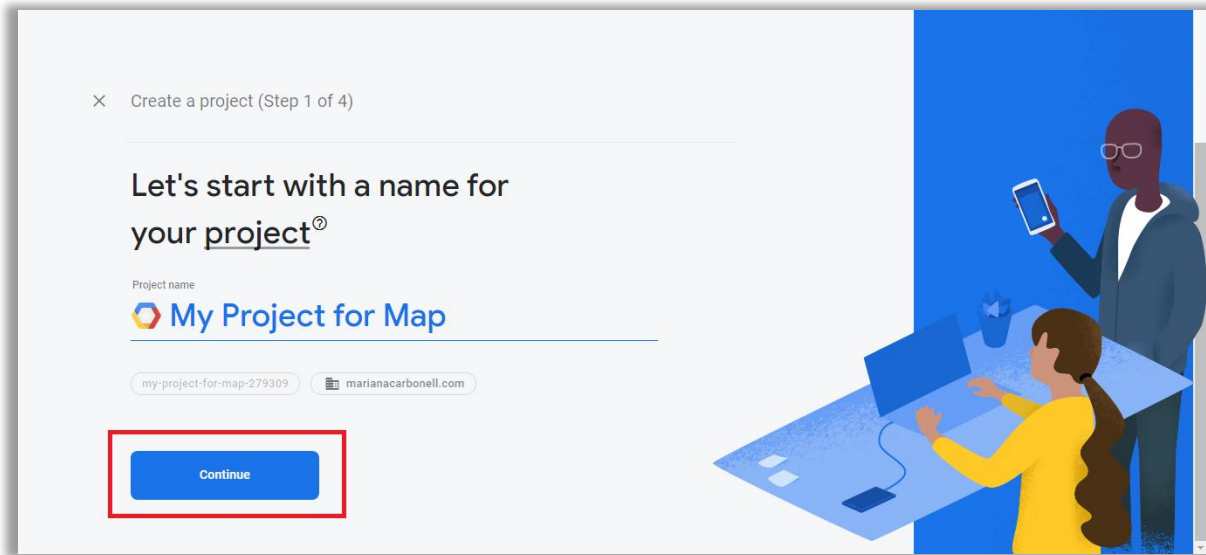


- We must configure the **Firestore** for "Live tracking". Follow the below steps:
 - Go the Firebase website, open this link: <https://console.firebase.google.com/>

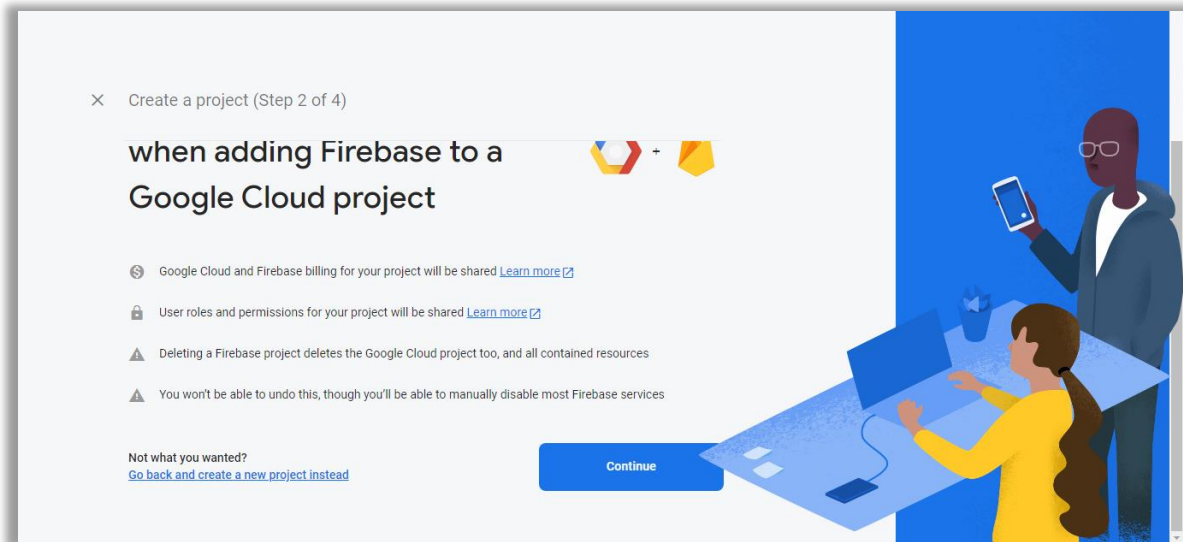


- Here you need to add a new project by clicking on the **+ Add project**.

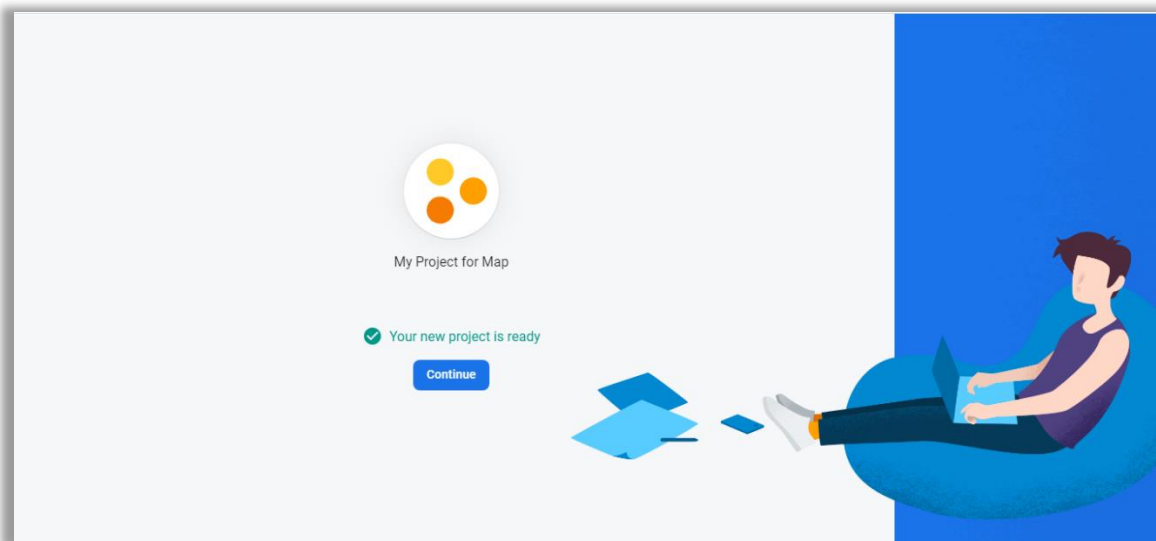
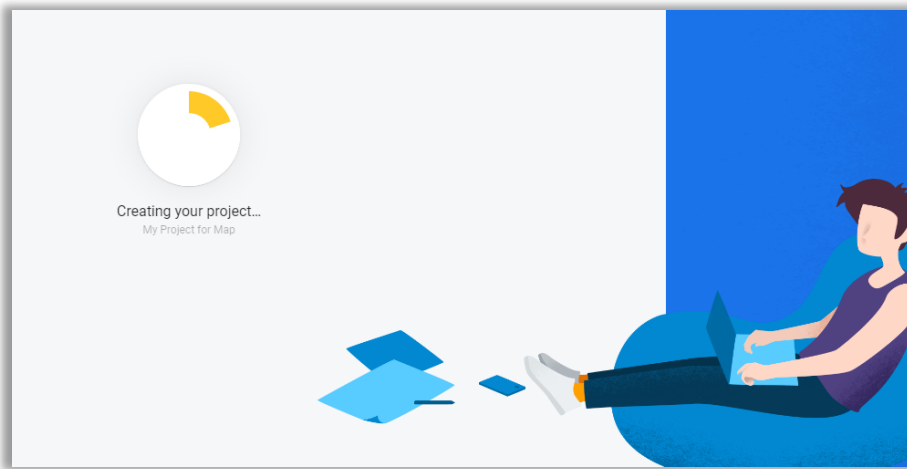
- Give a suitable name to your project and click on Continue to configure the details.



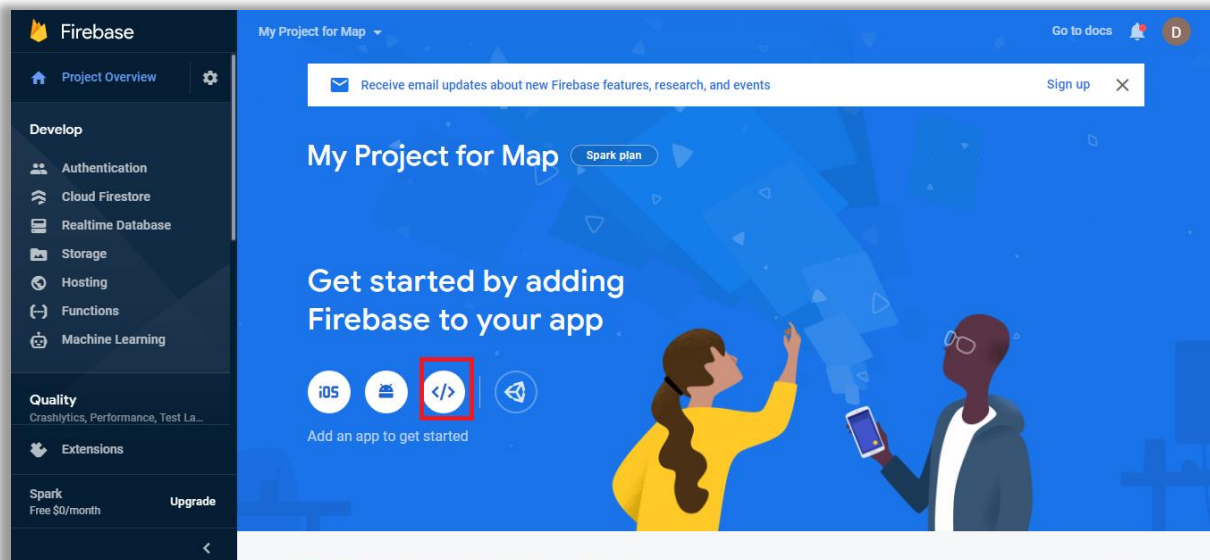
- In next, you will find the "Add Firebase", click on that.



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

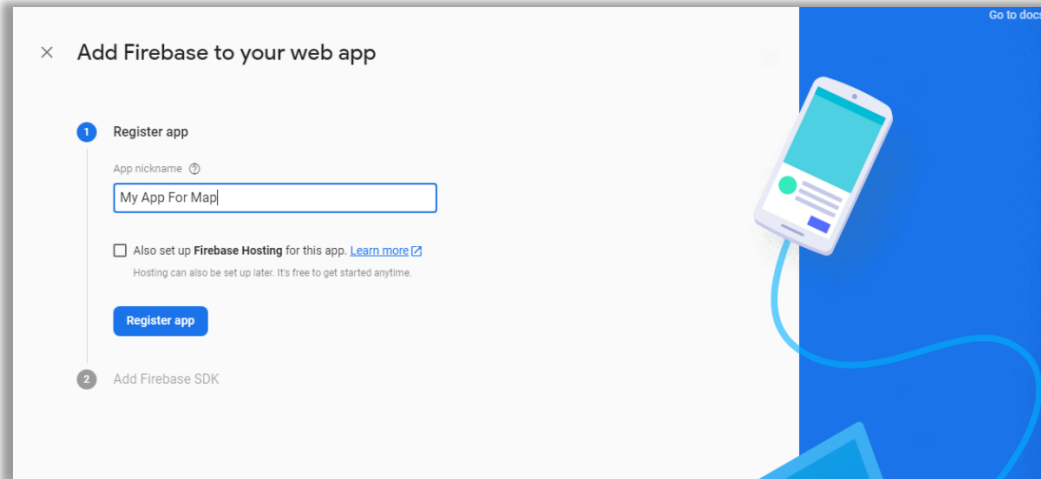


- Click on **Continue** for next details.
- Click on `</>` icon.



MappyField 365- "Installation & Configuration" User Manual

- 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 inserting the Firebase details into the MappyField 365 configuration, you can enable the Live User tracking feature.

Configure Languages

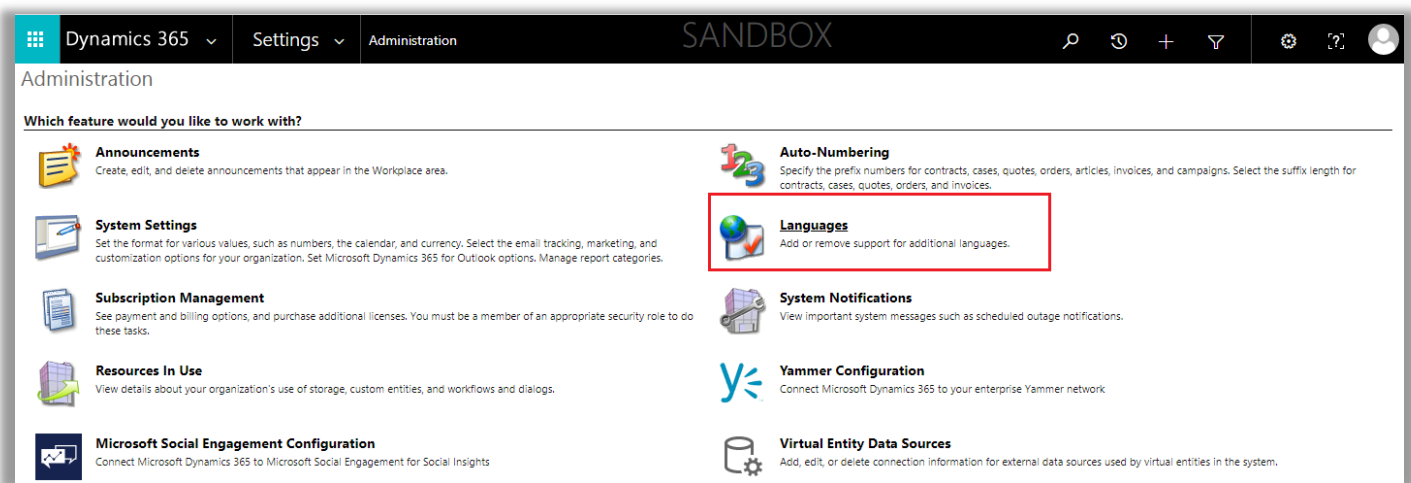
- You can also configure language of your choice by clicking on **Configure Languages** button available on Setup page.

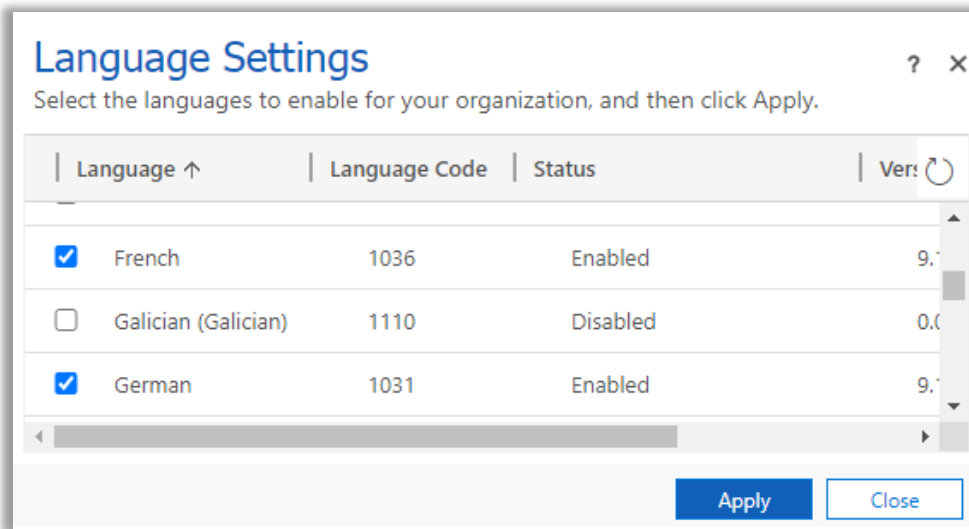


- Select the language from dropdown that you wish to configure your messages.
- Here, you need to add translations for the messages in the language of your choice.
- Click on **Save** button to save the language translations.

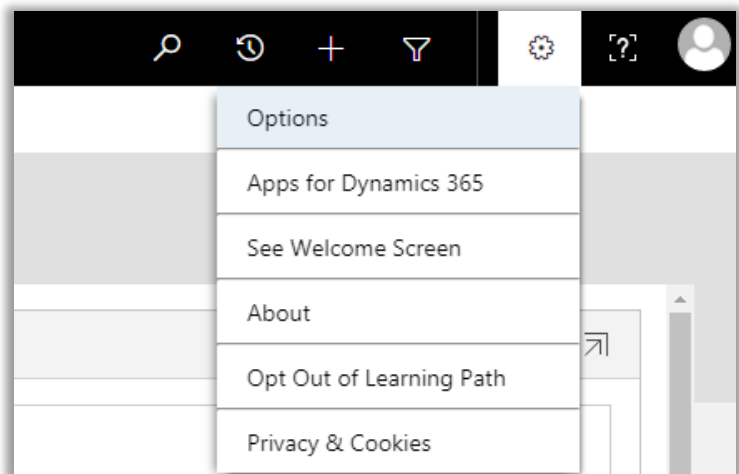
Note: To configure languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be listed for the MappyField 365.

- Go to **Settings** → **Administration** → **Languages** to enable/disable the languages.

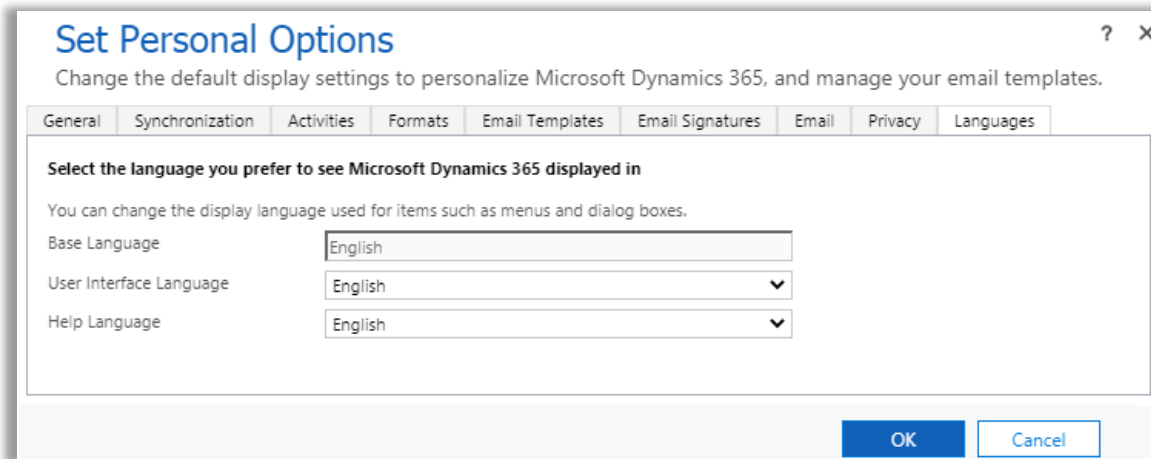




- You can enable or disable multiple languages from the list. After settings the language, click on the **Apply** button. This allows you to change languages in Microsoft Dynamics 365.
- Click on the **Settings gear** icon at the top right of the screen, choose Options to open the Set Personal Options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



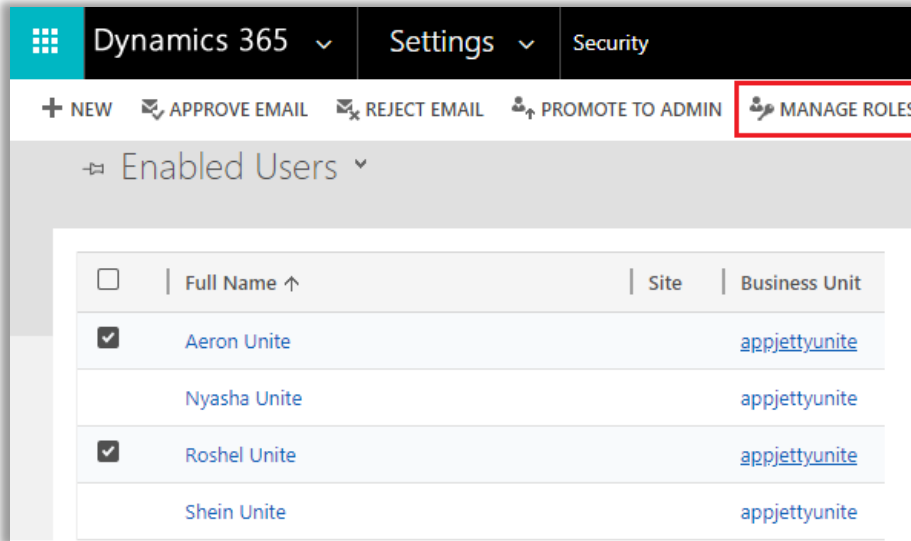
- Go to the **Languages** tab, select your user interface language, then click **OK**.



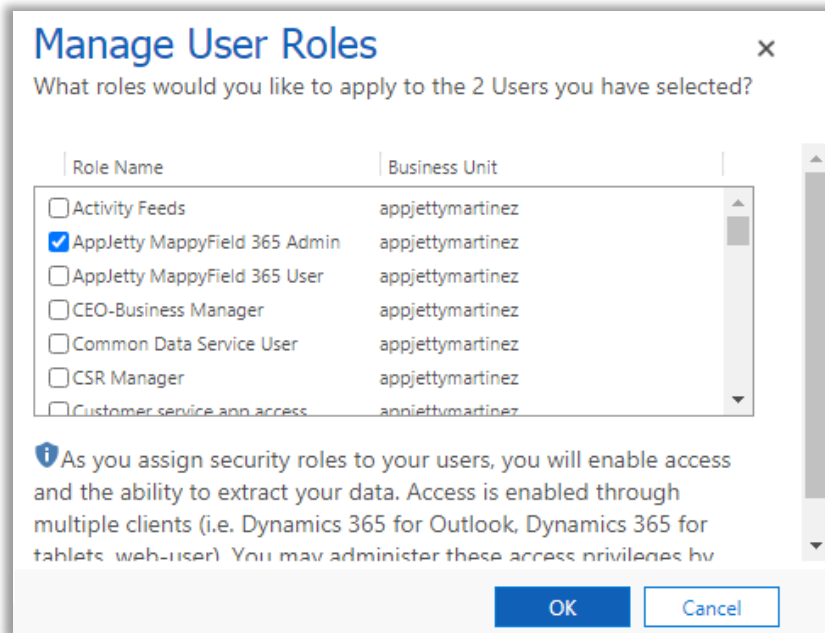
- Once you select the language here, that language will enable in the 'Configure Language' of MappyField 365 Setup.

Assign User Role

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



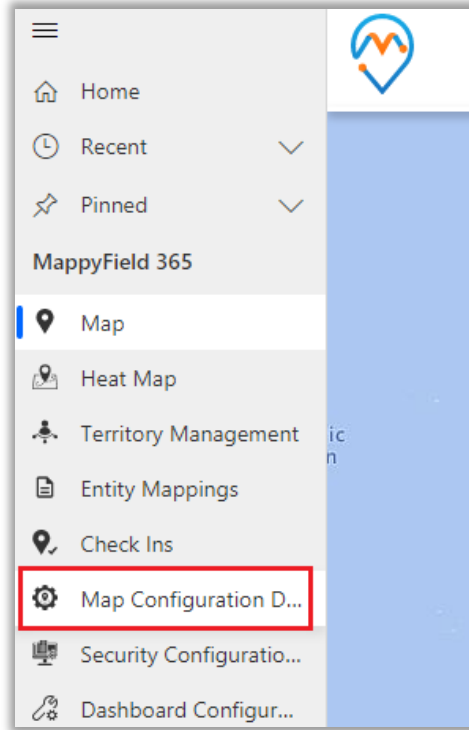
- Now select the users whose roles are to be managed and click on **'MANAGE ROLES.'**
- This will open a pop up to select roles.



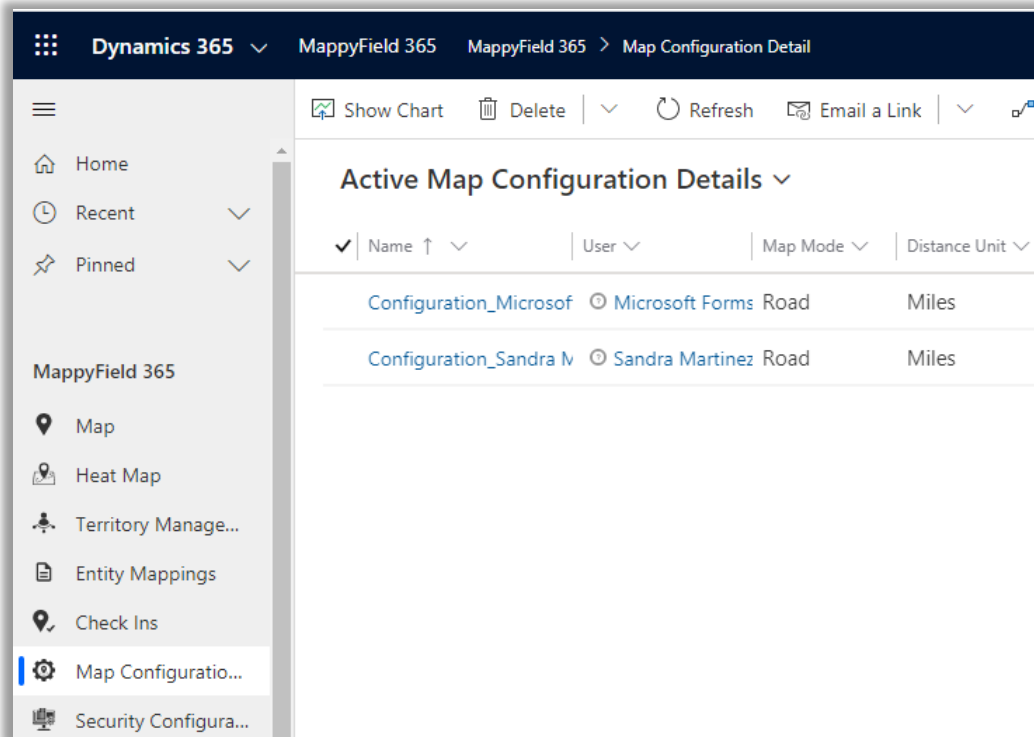
- The available roles for selection are **AppJetty MappyField 365 Admin** or **AppJetty MappyField 365 User** role.
- User with AppJetty MappyField 365 **Admin** role can perform all the actions like **System administrator** while user with AppJetty MappyField 365 User role can do all actions except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



Note: 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 <input type="text"/>
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.

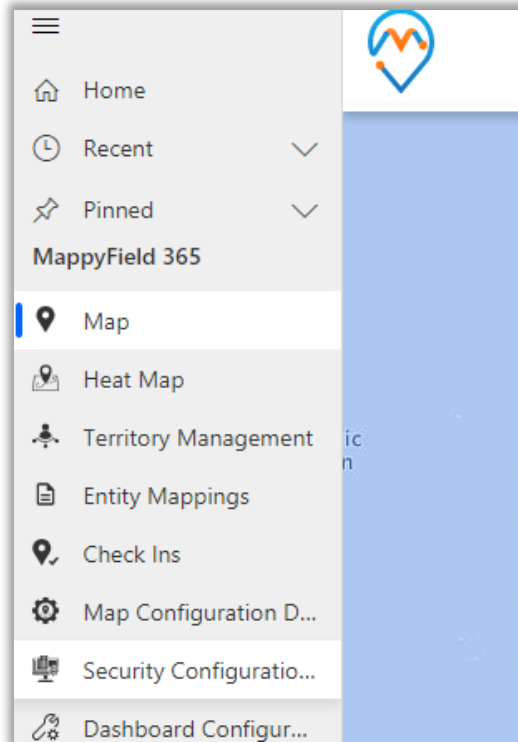
Note: Here the list of the Templates will appear as per the **Security Template Configurations**.

- **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 CONFIGURATION : INFORMATION


General Template 

▾ Action Configuration



Infobox Actions			
Select All Actions	<input type="checkbox"/>	Proximity Search	<input checked="" type="checkbox"/>
Add To Origin	<input checked="" type="checkbox"/>	Related Records	<input checked="" type="checkbox"/>
Add To Destination	<input checked="" type="checkbox"/>	Point Of Interest	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>	Delete Record	<input type="checkbox"/>
Assign Owner	<input type="checkbox"/>	Add Task	<input checked="" type="checkbox"/>
Add To Marketing List	<input checked="" type="checkbox"/>	Add Appointment	<input checked="" type="checkbox"/>



Bulk Actions			
Select All Bulk Actions	<input type="checkbox"/>	Copy Records	<input type="checkbox"/>
Add To Route	<input checked="" type="checkbox"/>	Export To Excel	<input checked="" type="checkbox"/>
Assign Owner	<input type="checkbox"/>	Export To PDF	<input checked="" type="checkbox"/>
Add Task	<input checked="" type="checkbox"/>	Print Records	<input checked="" type="checkbox"/>
Add Appointment	<input checked="" type="checkbox"/>	Add To Marketing List	<input checked="" type="checkbox"/>
Send Email	<input checked="" type="checkbox"/>	Point Of Interest	<input checked="" type="checkbox"/>
Territory Management	<input type="checkbox"/>	Category	<input checked="" type="checkbox"/>
Summary Card	<input checked="" type="checkbox"/>		

Active 

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

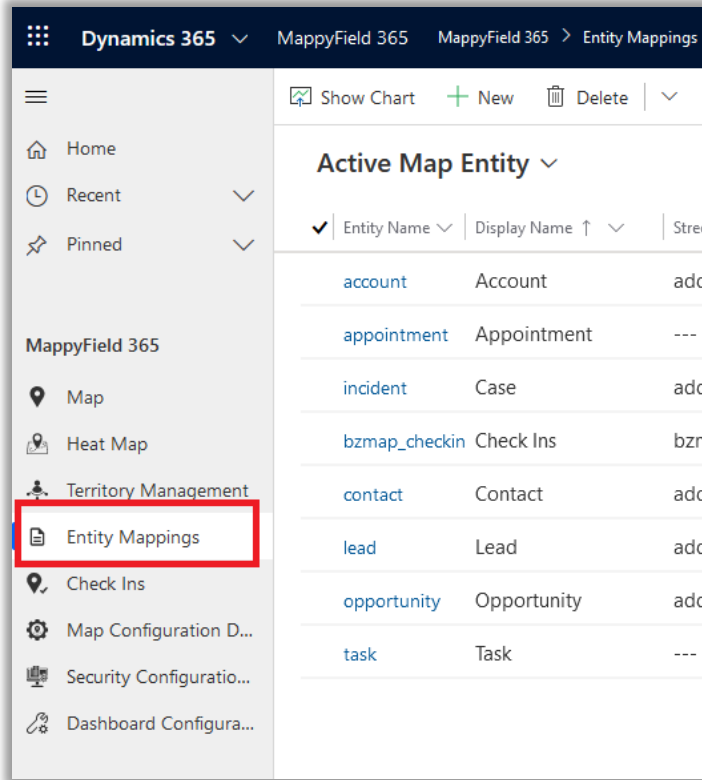
 

Name ↑	User	Map Mode	Distance Unit	Route Option	Heat Map Type	Plot Data	Default Location	Zoom Level
 Configuration_Aeron Unite 1/27/2020 4:43 PM								
 Configuration_Nyasha Unite 1/27/2020 4:43 PM								

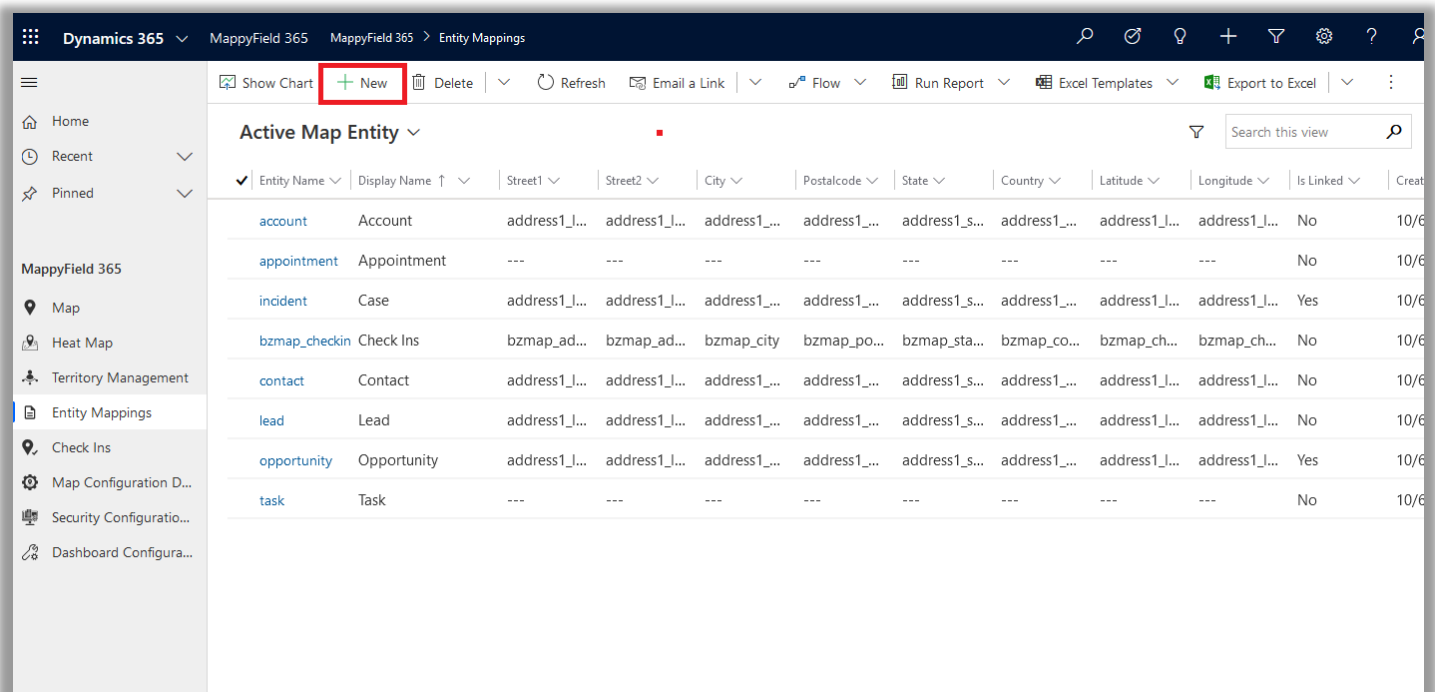
[Look Up More Records](#)

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.



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



- 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* **Link To**

Total Records **Geocoded Records**

Address Fields

Street 1* **State/Province***

Street 2* **Postal Code***

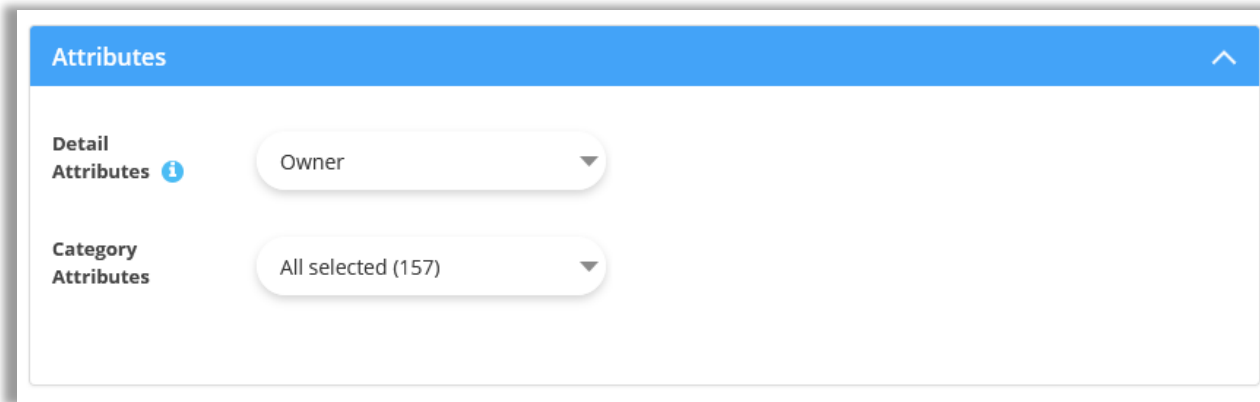
City* **Country***


Latitude* **Longitude***

Automatically Geocode 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.

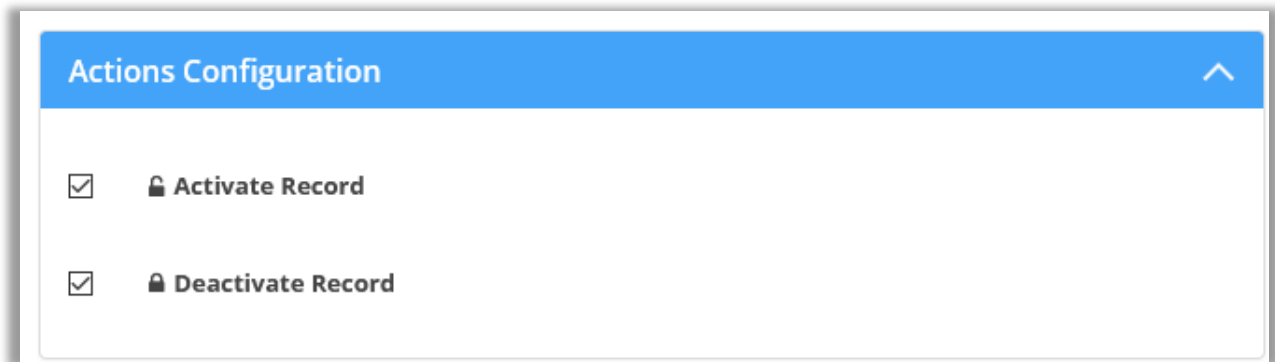
Attributes



- 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.

Display full address

Attribute*

Display Name*

Attribute	Display Name	Action
Account Name	Account 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.

Attribute*

Display Name*

Attribute	Display Name	Action
Annual Revenue	Annual Revenue	✕
Account Name	Account Name	
Address 1: Country/Region	Address 1: Country/Region	✕

Add

- 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*	<input type="text" value="--"/>	Attribute	Display Name	Aggregate Method	Action
		Number of Employees	Number of Employees	Sum	✕
Aggregate Method	<input type="text" value="Sum"/>	Annual Revenue	Annual Revenue	Sum	✕
Display Name*	<input type="text"/>				

Views Configuration

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

Views Configuration	
<input type="checkbox"/> Views	View Type
<input checked="" type="checkbox"/> My Active Accounts	System View
<input checked="" type="checkbox"/> Active Accounts	System View
<input checked="" type="checkbox"/> Inactive Accounts	System View
<input checked="" type="checkbox"/> Selected Accounts Campaigns	System View
<input checked="" type="checkbox"/> Accounts I Follow	System View
<input checked="" type="checkbox"/> Accounts Being Followed	System View
<input checked="" type="checkbox"/> Accounts: Responded to Campaigns in Last 6 Months	System View
<input checked="" type="checkbox"/> All Accounts	System View
<input checked="" type="checkbox"/> My Connections	System View
<input checked="" type="checkbox"/> Accounts: No Orders in Last 6 Months	System View
<input type="checkbox"/> All Accounts (not available)	System View
<input checked="" type="checkbox"/> 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				
<input type="checkbox"/>	Relationship List	Relation Schema	Relationship Id	Default Relationship ?
<input type="checkbox"/>	account - principalobjectattributeaccess	account_principalobjectattributeaccess	objectid	<input type="radio"/>
<input type="checkbox"/>	account - fax	Account_Faxes	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - slakpiinstance	slakpiinstance_account	regarding	<input type="radio"/>
<input type="checkbox"/>	account - postfollow	account_PostFollows	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - postregarding	account_PostRegardings	regardingobjectid	<input type="radio"/>
<input type="checkbox"/>	account - postrole	account_PostRoles	regardingobjectid	<input type="radio"/>

Showing 1 to 72 of 72 entries

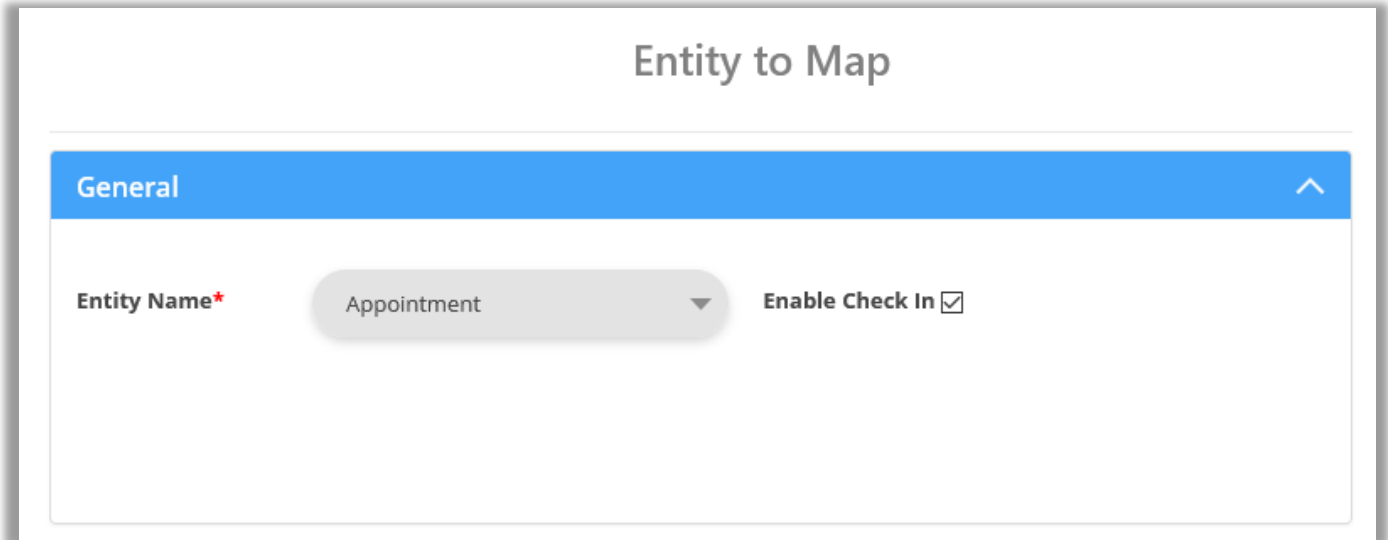
Tooltip Attributes Configuration

Tooltip Attributes				
Attribute*	Attribute	Display Name	Action	
<input type="text" value="--"/>	Account Name	Account Name		
<input type="text" value=""/>	Owner	Owner	<input type="button" value="x"/>	
<input type="button" value="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.



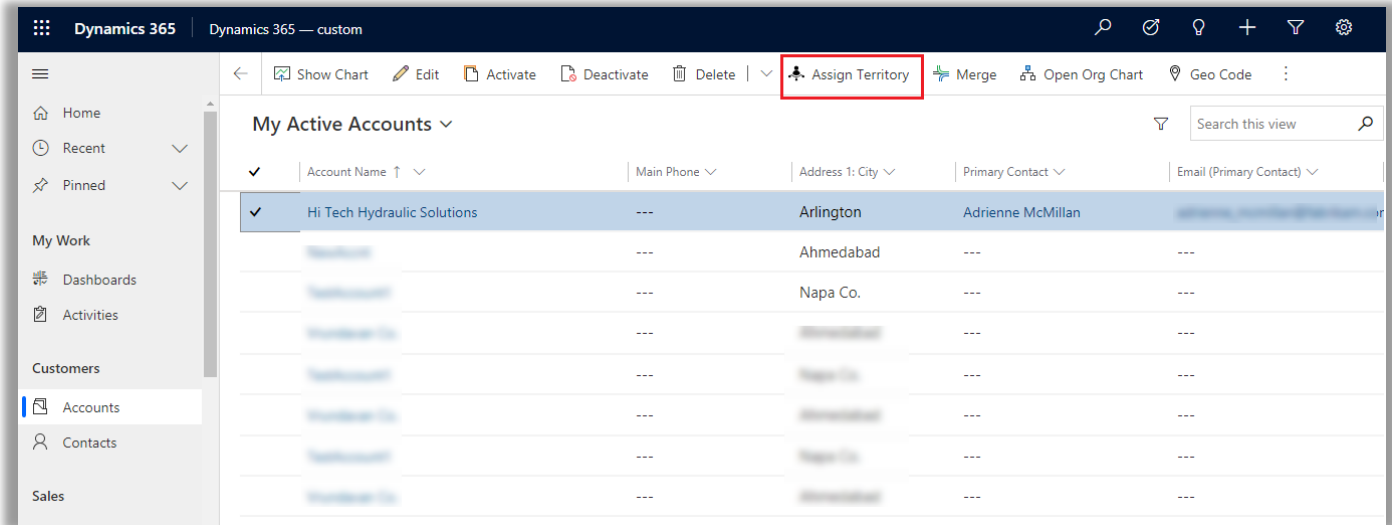
The screenshot shows a web interface titled "Entity to Map". Below the title is a blue header bar labeled "General" with an upward-pointing arrow on the right. The main content area contains a form with the following elements:

- A label "Entity Name*" followed by a dropdown menu showing "Appointment".
- A checkbox labeled "Enable Check In" which is checked.

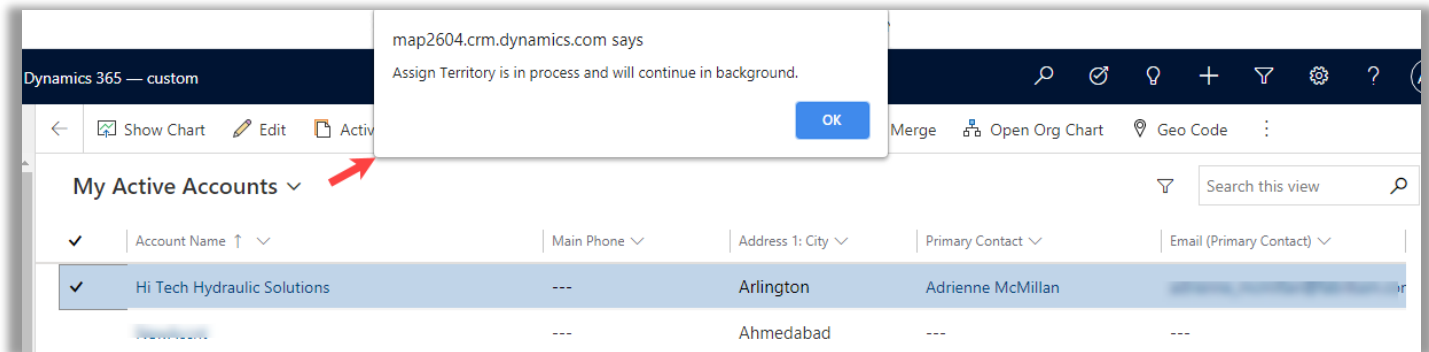
- By checking it, you will get the **Check-In & Check-Out** features for your activity.

Auto Territory Assign

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



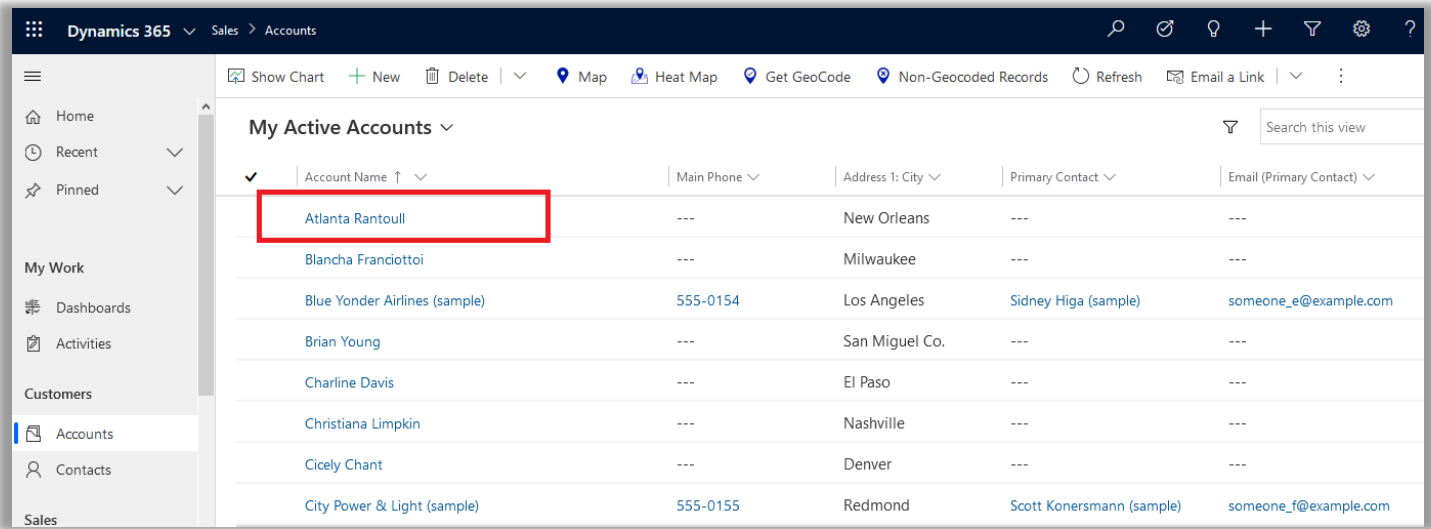
- By selecting any account record, you will get an option as **Assign Territory** on header (ribbon).
- Click on Assign Territory option to select the territory for the selected record. The territory as per the record's location/region will be selected.



Geocode Records

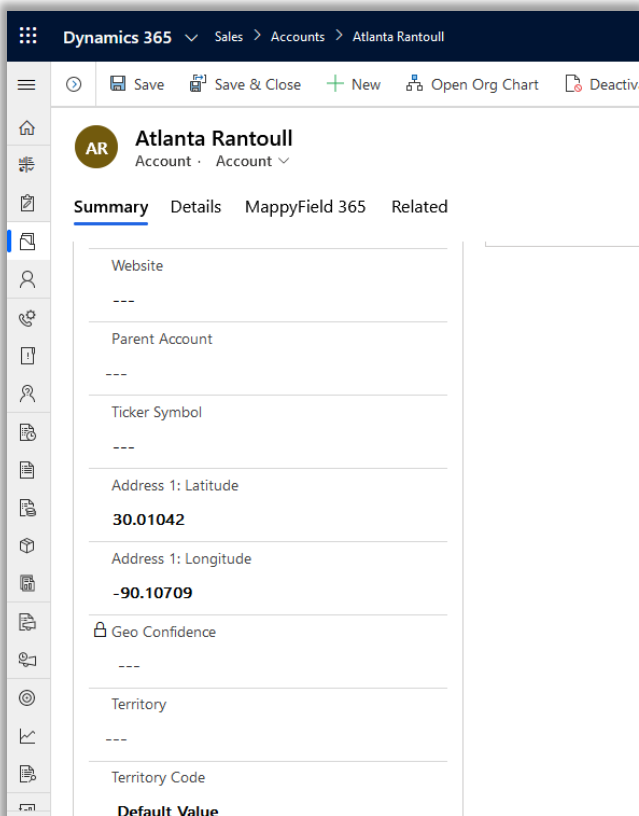
Manually Geocode the Record

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



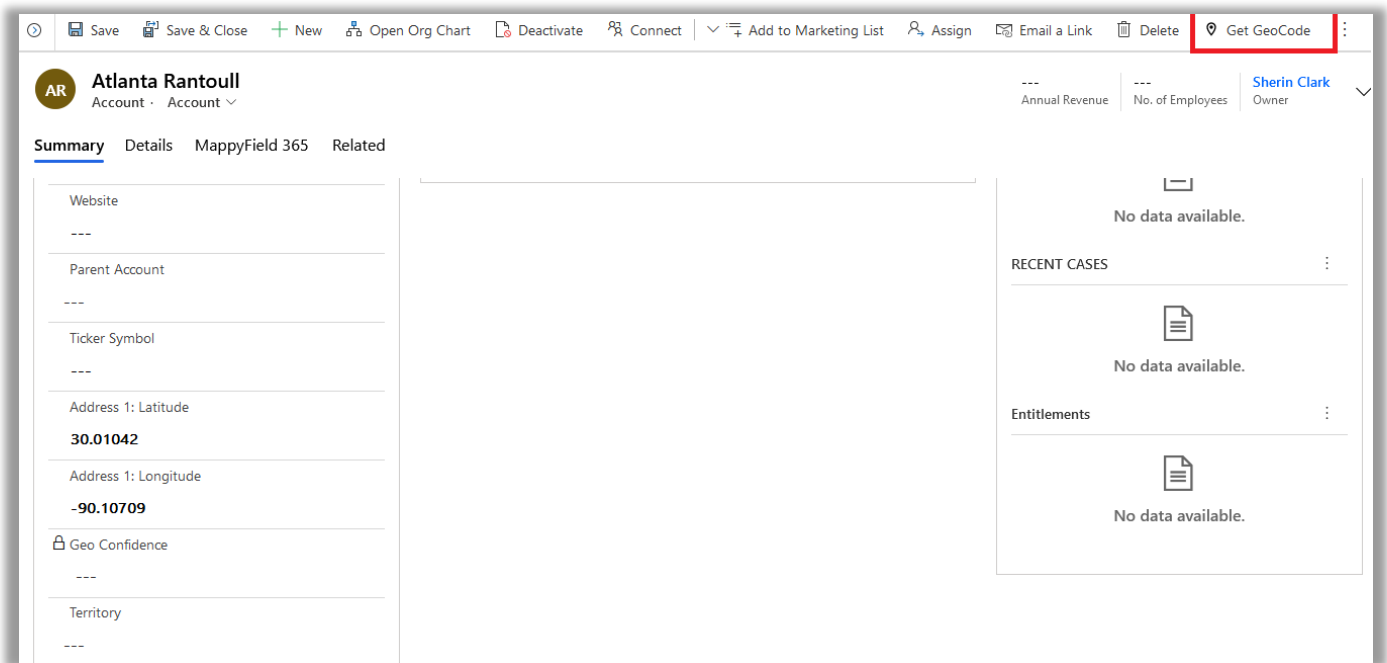
- You will get the Geocode as per your selection of view. Here you get the Geocode for "My Active Accounts". If you have not selected any record, it will get Geocode for all the Records.

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



- 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.

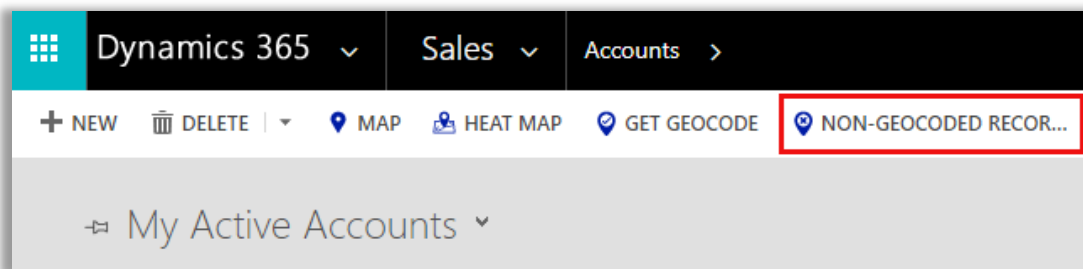
Note: You get option to geocode records only when that particular entity is **mapped** from Entity Mappings configuration.




- 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.

Non-Geocoded Records

CopyExcelPDFPrint

Search:

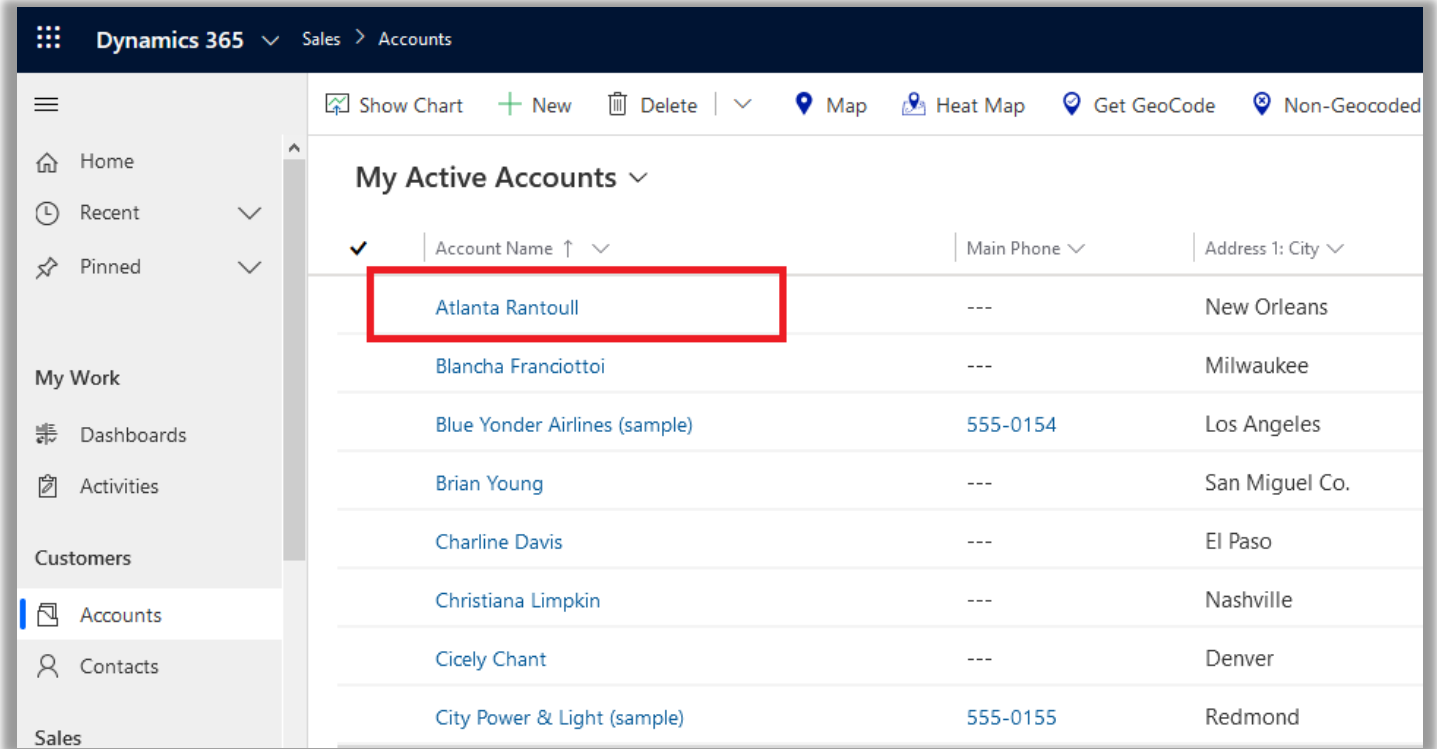
Full Name ▲	Address ⇅	Action
Avie Norgate	82067 Independence Junction Pas Pul	
Boot Moralas	90434 Washington Terrace Ordos	
Dorie Beckles	04 Schurz Parkway Hengfan	
Eleanora Jervoise	540 Carey Lane Putun	
Flem Humpherson	0657 Longview Place Krajan Kedungsalam	
Gawain Moorman	571 Myrtle Avenue Olejet	
Nannie Fargher	2694 Pond Center Son Trà	
Pall Curl	405 Dwight Street Bojonggaling	

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

Individual Records on Map View

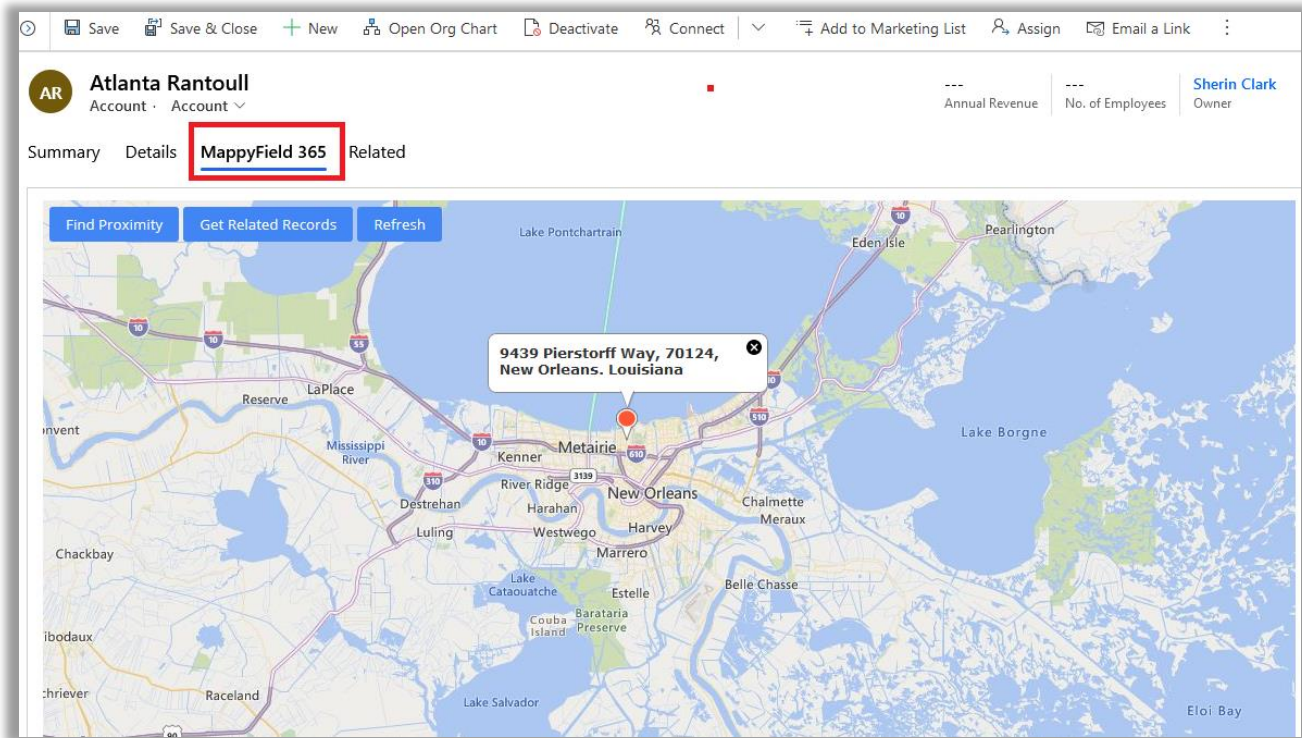
MappyField 365 section in Record Details


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

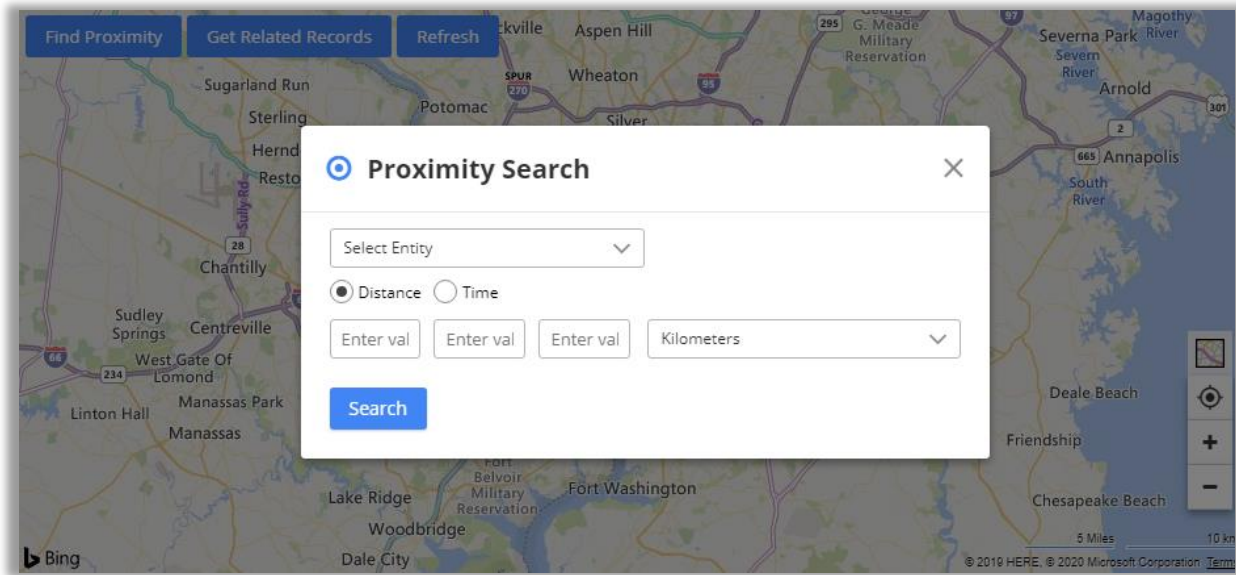


MappyField 365- "Installation & Configuration" User Manual

- 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.



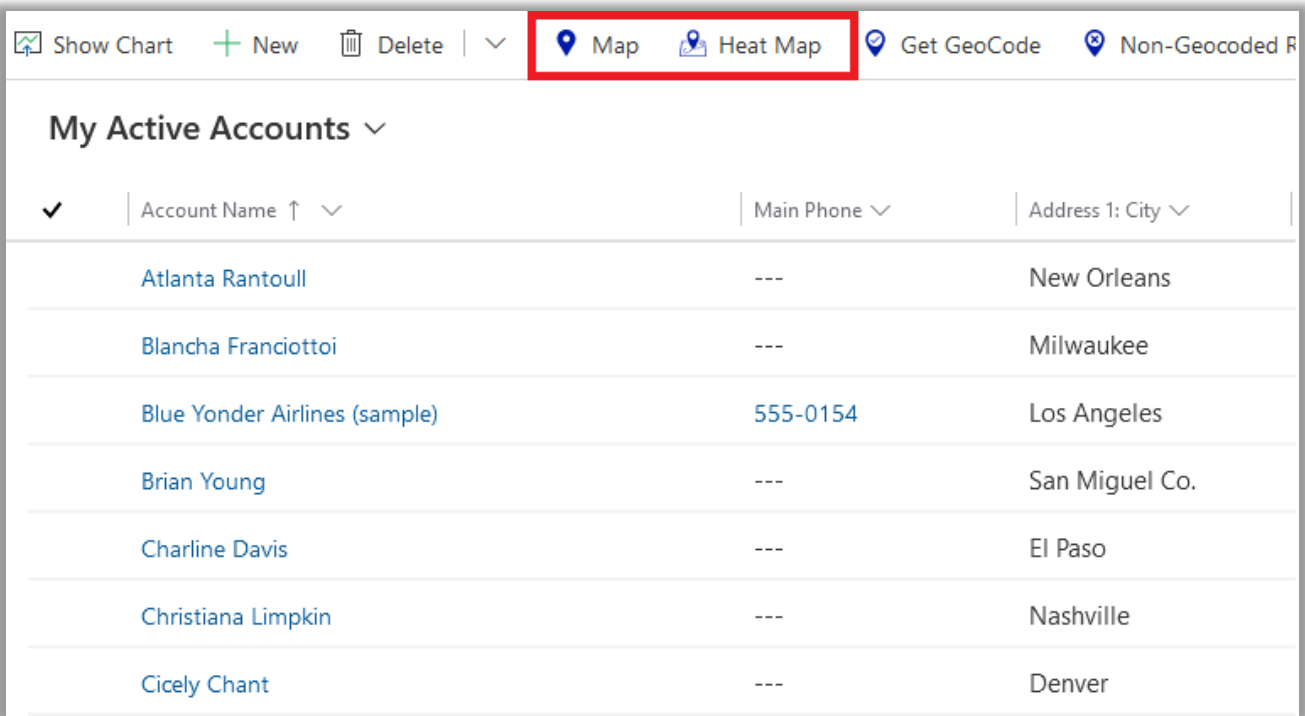
- On map there is a pin  plotted based on the address entered for the record.
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving, it would prompt a confirmation message. Click **OK** to update and continue.
- You can update latitude and longitude 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.



- **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

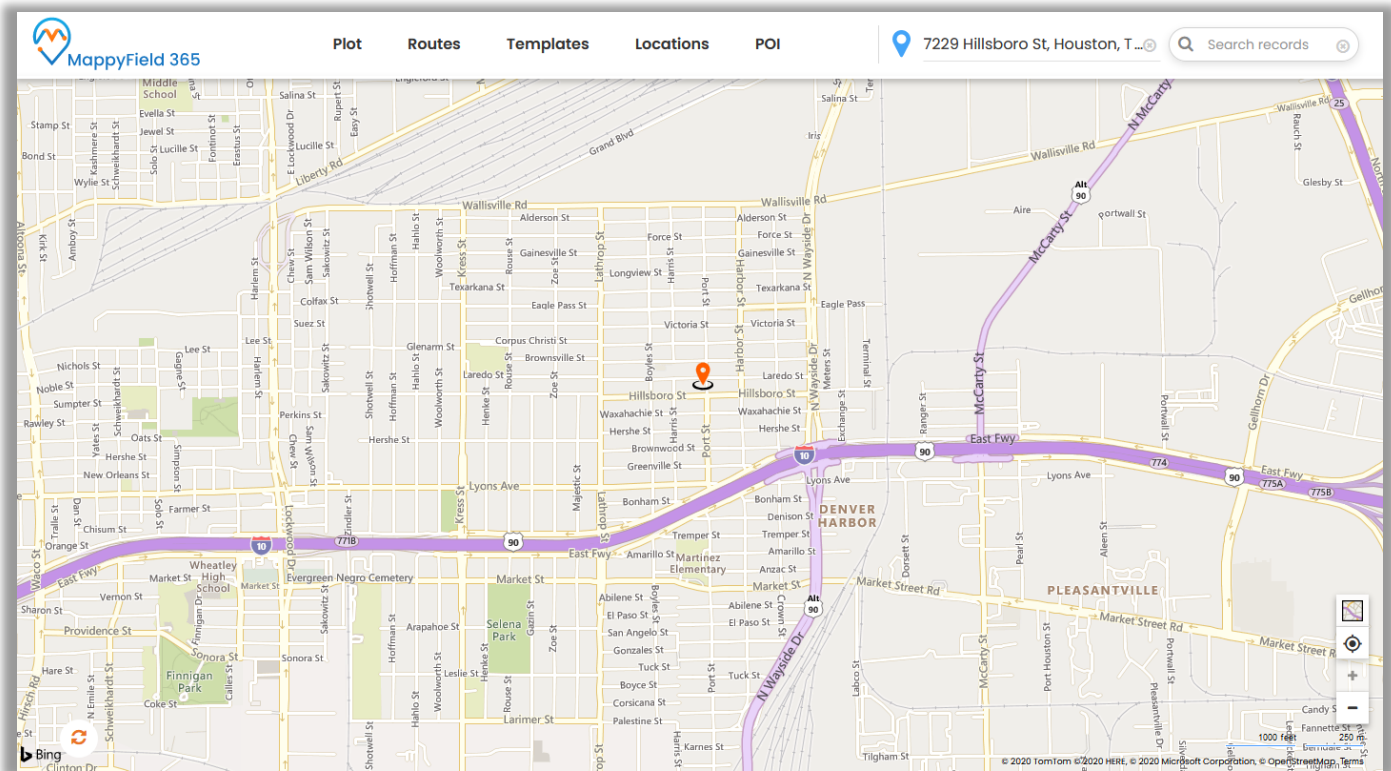
- The map options are provided in all the entities on the header.
- You can access the  Map and  Heat Map from the Entity.



The screenshot shows the top navigation bar with icons for 'Show Chart', '+ New', 'Delete', 'Map', 'Heat Map', 'Get GeoCode', and 'Non-Geocoded R'. Below this is a table titled 'My Active Accounts' with columns for 'Account Name', 'Main Phone', and 'Address 1: City'. The 'Map' and 'Heat Map' buttons are highlighted with a red box.

Account Name	Main Phone	Address 1: City
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.



Contact Us

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