



MAPLYTICS™ – Installation Manual












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Solution Import

Please import the Maplytics Managed solution that was included in the archived file sent to you. Extract the folder, and you will find Managed Solution file as shown below:

	BatchProcessingTool_2_0_0_9	3/18/2019 9:57 AM	Compressed (zipp...	2,839 KB
	Maplytics - Installation Manual	3/18/2019 11:41 AM	PDF File	3,494 KB
	Maplytics - License Registration	3/18/2019 11:41 AM	PDF File	977 KB
	Maplytics - User Manual	3/18/2019 11:42 AM	PDF File	19,746 KB
	Maplytics - WhitePaper	3/18/2019 11:44 AM	PDF File	2,799 KB
	Maplytics Terms of Use	3/13/2018 4:48 PM	PDF File	283 KB
	Maplytics_9_0_4_0_managed	3/18/2019 8:43 AM	Compressed (zipp...	3,712 KB
	Maplytics_Dyn365_V9	3/18/2019 11:57 AM	Compressed (zipp...	31,269 KB
	Read-Me	3/16/2019 4:41 PM	Text Document	2 KB

The file name can vary depending on the CRM version:

- Dynamics 365 Online Version 9.x – Maplytics_9_0_4_0_managed
- Dynamics 365 / CRM 2016 – Maplytics_8_0_7_0_managed

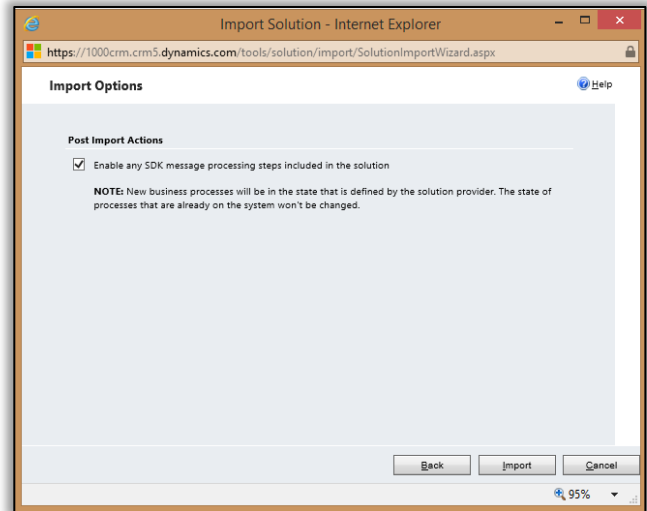
You need to complete the configuration and license registration before you can proceed with Maplytics.

Note: You need to have the System Administrator Role assigned to you in CRM to complete the installation steps explained below.

Import solution in Dynamics CRM:

To import the managed solution, **Go to Settings > Solution > Import > Browse the managed solution > Import**

While importing the Solution, please check the **'Enable any SDK'** message as shown in the below screenshot;

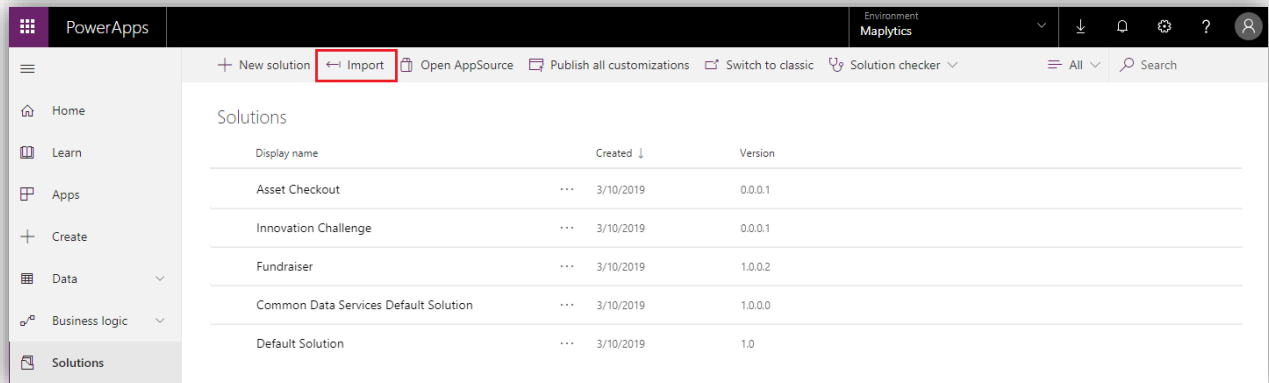
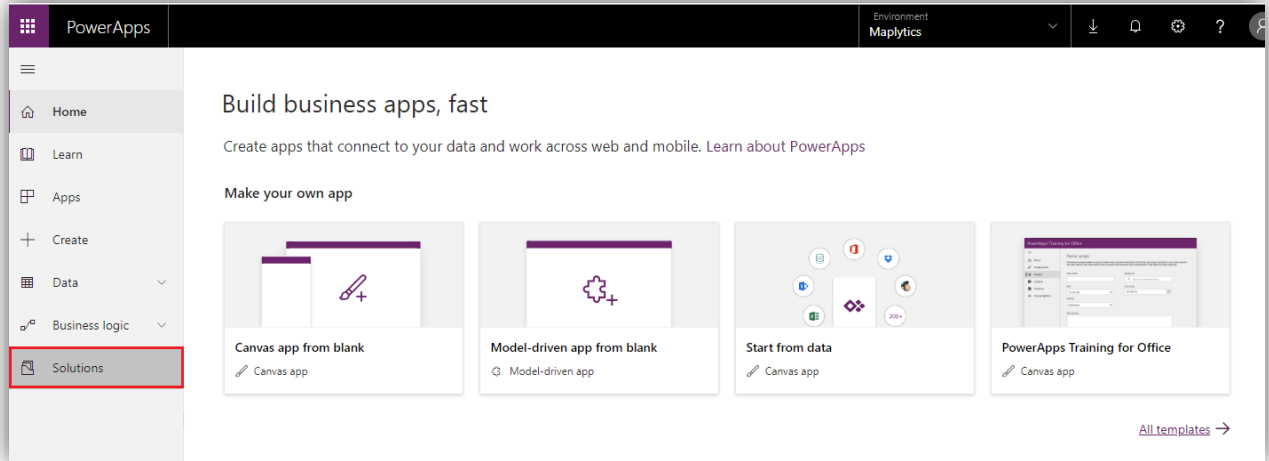


Note:

- **CRM 2013 and CRM 2015:** When we create a solution, we use the vanilla box of CRM. After importing Maplytics solution, all entity level properties of Account/Contact/Lead are overridden. So after installation, you have to set those properties manually. The example would be auditing, if you have turned on the auditing then it will turn off after importing Maplytics solution. So you have to turn it on manually.
- **CRM 2016 and above:** Entity-level properties will remain the same as before importing the solution.

Import solution in CDS

To import the managed solution in CDS, **Go to Solution in the left navigation pane > Import > Browse the solution file > Import**



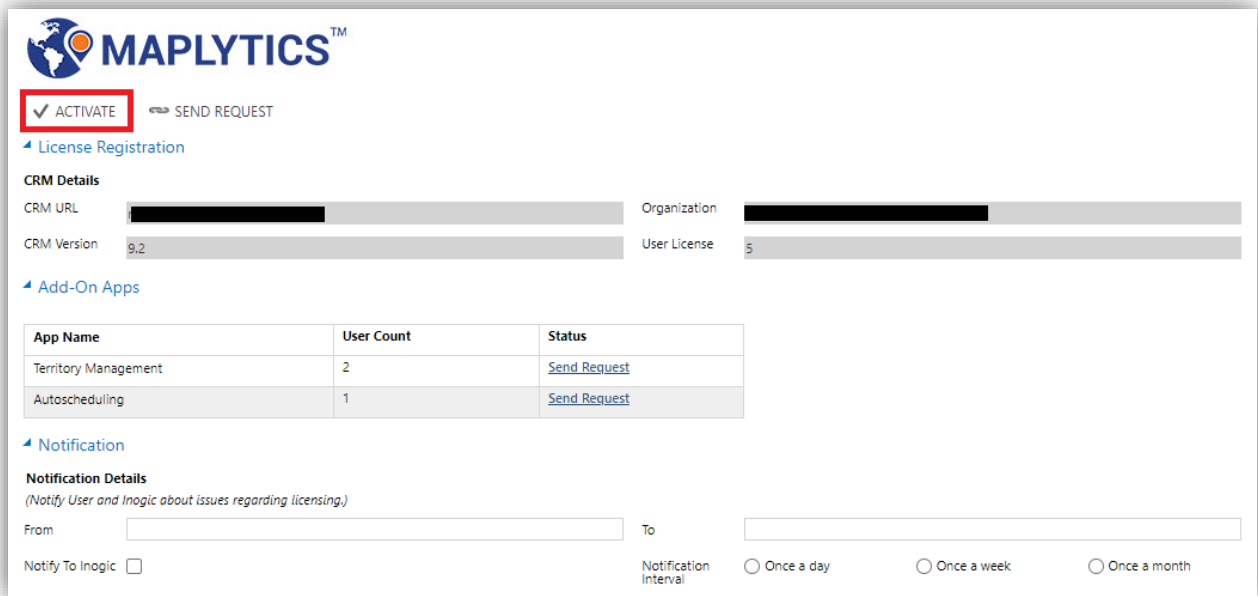
Initial Setup - Maplytics License Activation, Configuration for Entity Map, Dashboards and Census data

Activate

- Navigate to **Settings > Advanced Settings > Maplytics section > License registration** to complete Maplytics configuration using the Configuration section of the solution.

The screenshot displays the Maplytics configuration page within the Dynamics 365 environment. The left-hand navigation pane shows the 'Settings' menu item highlighted. The main content area is titled 'MAPLYTICS™' and features two primary buttons: 'ACTIVATE' and 'SEND REQUEST'. Below these, the 'License Registration' section contains input fields for 'CRM URL', 'CRM Version' (set to 9.2), 'Organization', and 'User License'. A table titled 'Add-On Apps' lists 'Territory Management' and 'Autoscheduling' with their respective user counts and 'Send Request' links. The 'Notification' section includes fields for 'From' and 'To' email addresses, a 'Notify To Inlogic' checkbox, and radio buttons for 'Notification Interval' (Once a day, Once a week, Once a month). At the bottom, the 'License Registration using (*.lic) file' section shows the 'License Start Date' as 4/27/2021 and the 'License End Date' as 7/11/2021, with a status of 'Active'.

- For trial version, fill up the data in the **License Registration** section and click on the **'ACTIVATE'** button, which will activate the product license for 15 days. In the case of purchase or to extend the trial, click on the **'SEND REQUEST'** button, which will send an email to us with the details entered in the **License Registration** section. Once the request has been processed, you will receive an email from our end, and then you can click on the **'ACTIVATE'** button to activate/extend the license.



MAPLYTICS™

☒ **ACTIVATE** [SEND REQUEST](#)

License Registration

CRM Details

CRM URL: [Redacted] Organization: [Redacted]

CRM Version: 9.2 User License: 5

Add-On Apps

App Name	User Count	Status
Territory Management	2	Send Request
Autoscheduling	1	Send Request

Notification

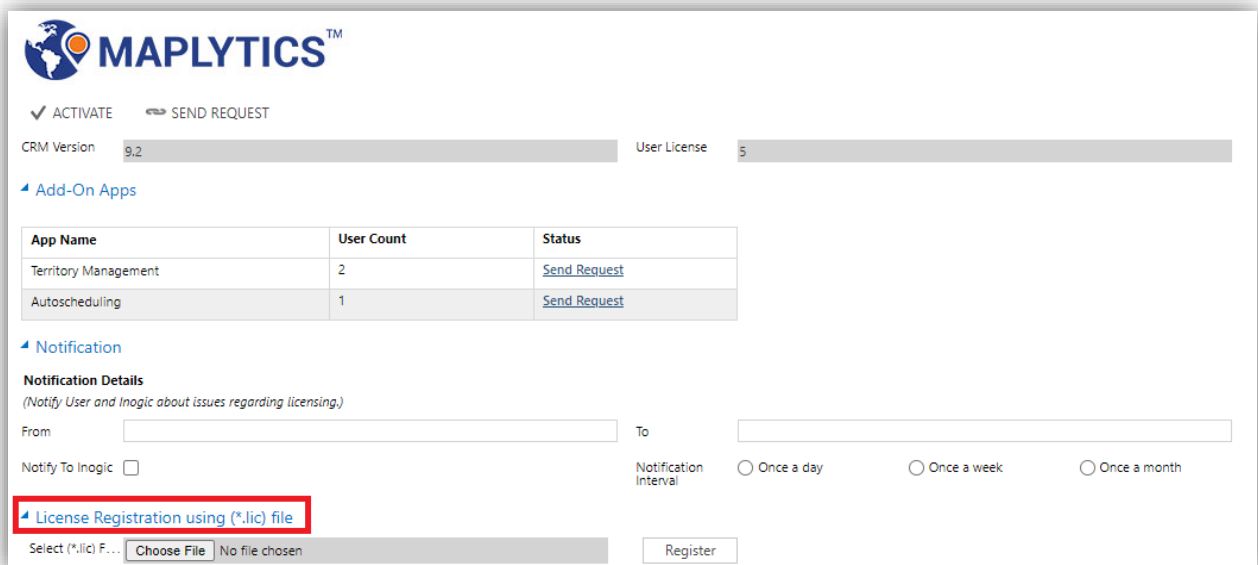
Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: [Redacted] To: [Redacted]

Notify To Inogic ☐

Notification Interval: ☐ Once a day ☐ Once a week ☐ Once a month

In case you are not able to activate the license using the **‘Activate’** button, then we have provided an alternate option. In that case, we will provide you a license file which you can browse from the **‘License Registration using (*.lic) file’** and click on the **‘Register’** button to activate the license.



MAPLYTICS™

☒ **ACTIVATE** [SEND REQUEST](#)

CRM Version: 9.2 User License: 5

Add-On Apps

App Name	User Count	Status
Territory Management	2	Send Request
Autoscheduling	1	Send Request

Notification

Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: [Redacted] To: [Redacted]

Notify To Inogic ☐

Notification Interval: ☐ Once a day ☐ Once a week ☐ Once a month

License Registration using (*.lic) file

Select (*.lic) F... No file chosen

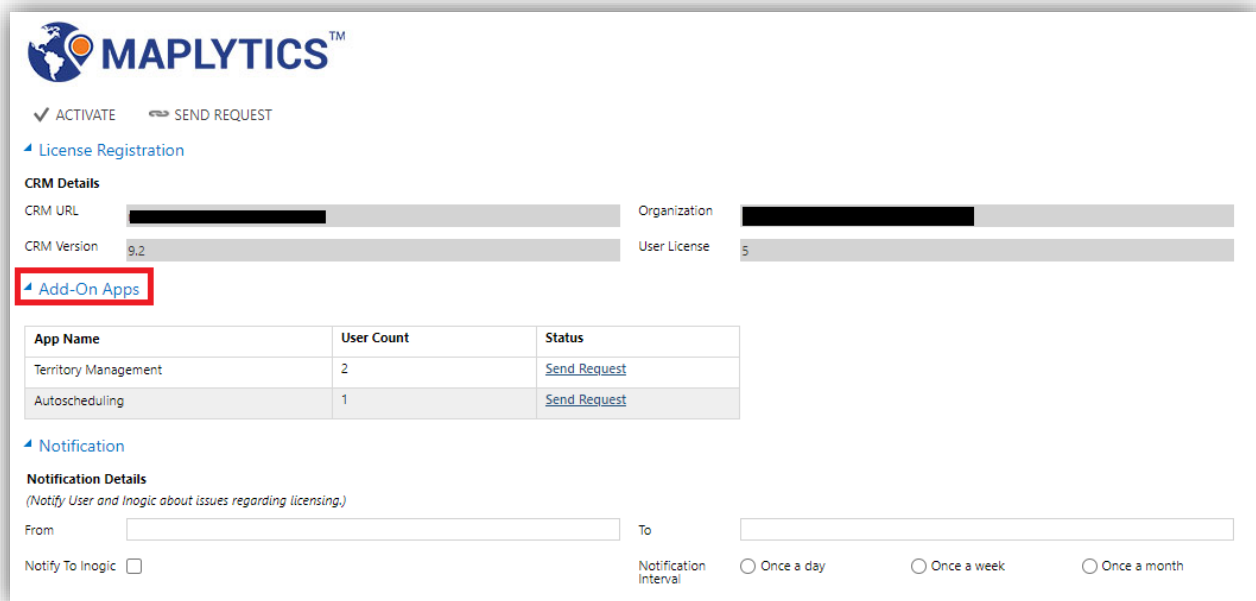
Add-on Apps

Maplytics offers Additional Advanced Features like Territory Management, Auto Scheduling and Truck Routing which can be purchased along with the Core Maplytics features. Maplytics admin and System admins can see the details about the additional Maplytics apps as mentioned below.

App Name: Name of the additional app

User Count: The count of users for which the respective app has been purchased will be mentioned here. If the additional app has not been purchased the user count will be 0.

Status: User can use the 'Send Request' button to request for the required additional app or add more users for the respective app.



MAPLYTICS™

✓ ACTIVATE SEND REQUEST

License Registration

CRM Details

CRM URL: [Redacted] Organization: [Redacted]

CRM Version: 9.2 User License: 5

Add-On Apps

App Name	User Count	Status
Territory Management	2	Send Request
Autoscheduling	1	Send Request

Notification

Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: [Redacted] To: [Redacted]

Notify To Inogic: ☐

Notification Interval: ☐ Once a day ☐ Once a week ☐ Once a month

Notify about license

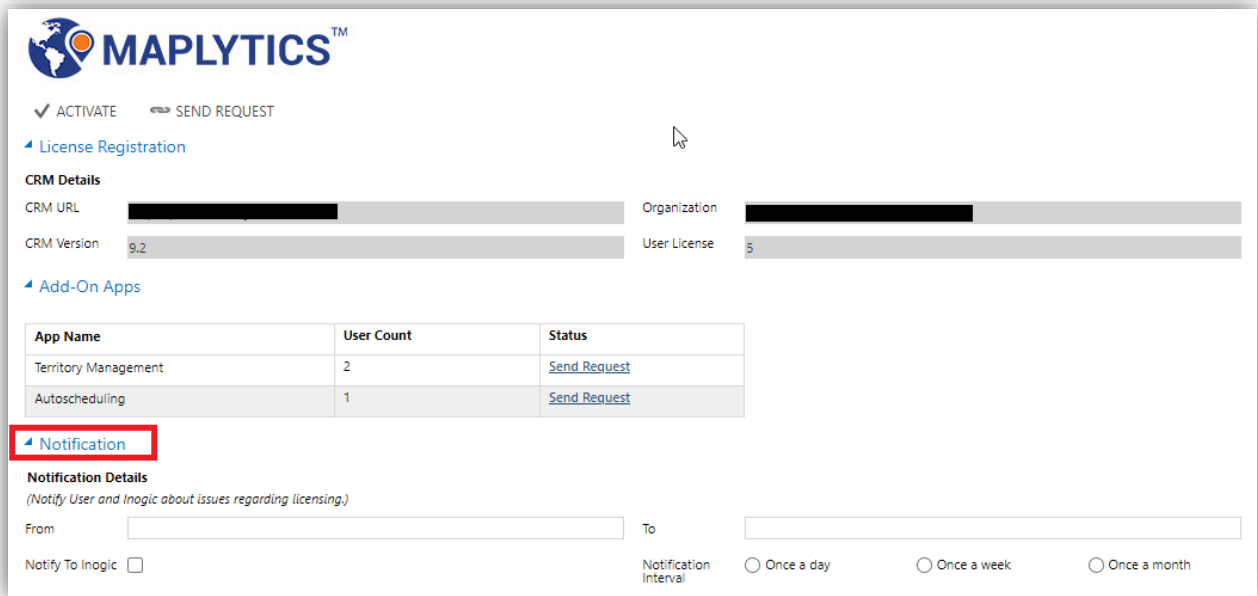
- If you want to notify any user about any issues regarding licensing then System admin needs to enter the details in Notification section.

From: Select the user in your CRM who has email configured and can be used to send emails.

To: Select the user to whom the Notification email should be sent.

Notify to Inogic: If this is checked then an Account will be created in your CRM with name "Inogic" and email address as crm@inogic.com. The notification emails will also be sent to Inogic at crm@inogic.com

Notification Interval: This decides how often you want to send the notification email before the issue gets resolved: Once a Day or once a week or once a month.



MAPLYTICS™

✓ ACTIVATE SEND REQUEST

License Registration

CRM Details

CRM URL: [Redacted] Organization: [Redacted]

CRM Version: 9.2 User License: 5

Add-On Apps

App Name	User Count	Status
Territory Management	2	Send Request
Autoscheduling	1	Send Request

Notification

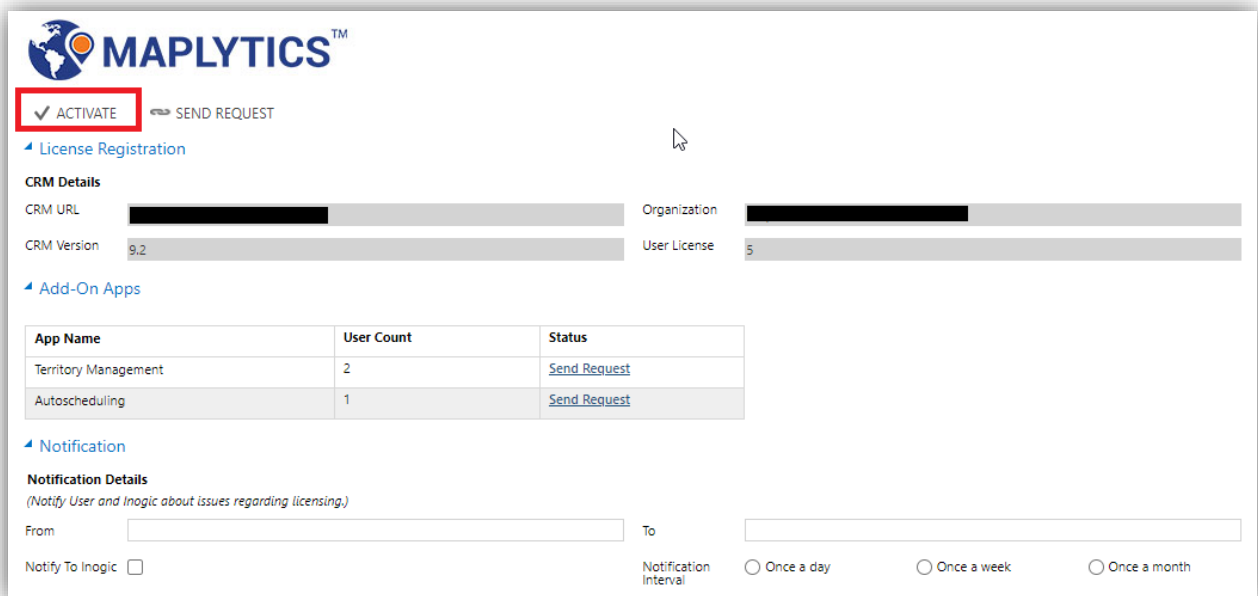
Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: [Redacted] To: [Redacted]

Notify To Inogic: ☐

Notification Interval: ☐ Once a day ☐ Once a week ☐ Once a month

After filling the Details click on 'ACTIVATE' for activating the Trial Version for 15 days. The license is issued based on the details filled in the CRM Details section. The User License is the count of active users in the CRM.



MAPLYTICS™

✓ ACTIVATE SEND REQUEST

License Registration

CRM Details

CRM URL: [Redacted] Organization: [Redacted]

CRM Version: 9.2 User License: 5

Add-On Apps

App Name	User Count	Status
Territory Management	2	Send Request
Autoscheduling	1	Send Request

Notification

Notification Details
(Notify User and Inogic about issues regarding licensing.)

From: [Redacted] To: [Redacted]

Notify To Inogic: ☐

Notification Interval: ☐ Once a day ☐ Once a week ☐ Once a month

Configure

- To install Maplytics Configuration records like Dashboards, Entity Map and Personalization click on the **Configure** button.

The screenshot shows the Maplytics™ configuration page. At the top, there's a logo and navigation links: 'ACTIVATE' and 'SEND REQUEST'. Below this is the 'License Registration' section. Under 'CRM Details', there are fields for 'CRM URL', 'CRM Version' (9.2), 'Organization', and 'User License'. There are also links for 'Add-On Apps', 'Notification', and 'License Registration using (*.lic) file'. The 'Configure' button is highlighted with a red box. Below it is a 'Bing Maps Key' field and an 'Update' button. At the bottom, there's a 'Notes' link.

- These records will be based on the modules installed in CRM (Sales, Customer Service, and Field Service). This will also configure shape files for Census data as well as Assets for truck route. The user can choose the records they want to configure. By default, all the records will be checked.

The screenshot shows the 'Maplytics Configuration' dialog box. It has tabs for 'Core Records', 'Sales', 'Customer Service', 'Field Service', and 'Shape Layers'. The 'Core Records' tab is selected. Under 'Assets Data', there are two sections: 'Entity Maps' and 'Dashboards'. Each section has a table of records to be configured. The 'Entity Maps' table has 6 rows, all with checked boxes. The 'Dashboards' table has 2 rows, both with checked boxes. At the bottom, there's a checkbox for 'Create Personalized Records' which is checked, and a 'Proceed' button.

Entity Maps	
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Account
<input checked="" type="checkbox"/>	Contact
<input checked="" type="checkbox"/>	Appointment
<input checked="" type="checkbox"/>	Customer Address
<input checked="" type="checkbox"/>	Check-In

Dashboards	
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	My New Accounts This Month

Create Personalized Records: For existing customers, if the User Configuration Detail records are not there, user can select this option and click on 'Proceed' to create the User Configuration Detail records for all the user which are there in the Maplytics team.

Note:

- *If the Entity Maps are not created for any entity, it will be created while reconfiguration.*
- *If the Entity Map is already created for any entity, changes done to the Entity Map by the user will remain intact.*
- *Modules which are not installed in the organization will get listed in the Maplytics Configuration window, but it will be deactivated. User cannot select the Entity Maps /Dashboards for that module.*
- *By default, the Census data records are not checked for configuration. If the user wants to configure the Census data, please select the check boxes for Census data before clicking on 'Proceed'. While reconfiguring, the existing Census data territories, the geographies and the categories set within, will get deleted.*

Use Own Bing Maps Key

Within the subscription of Maplytics licenses, Maplytics ships Bing Maps Key in order to allow users to use Bing maps API within their CRM. However, user can also choose to use their own Bing Maps Keys for the same.

To enable their own Bing Maps Key, user can follow the steps mentioned below:

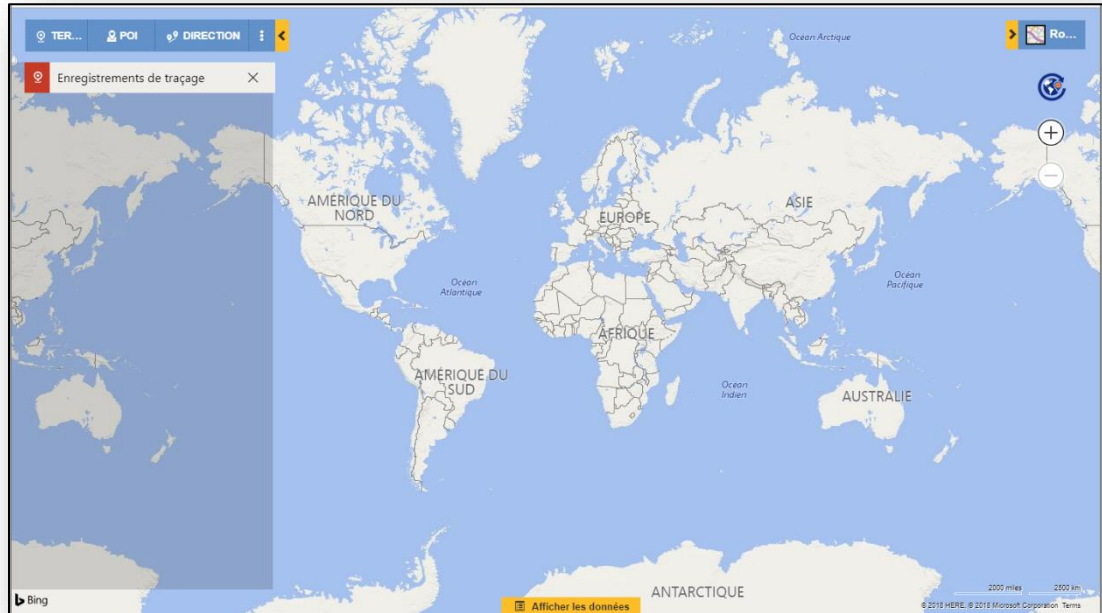
Go to Settings > License Registration > Configure > Bing Maps Key > Enter their own Bing Maps Key > click on Update

This will start using the entered Bing Maps key while the user uses Bing maps API

The screenshot shows the Maplytics configuration interface. At the top, there's a logo and the text 'MAPLYTICS™'. Below it, there are two buttons: 'ACTIVATE' and 'SEND REQUEST'. A navigation menu on the left includes 'License Registration', 'CRM Details', 'Add-On Apps', 'Notification', 'License Registration using (*.lic) file', 'Configure', and 'Notes'. The 'Configure' section is active, showing a 'Configure' button and a 'Bing Maps Key' field. The 'Bing Maps Key' field is highlighted with a red box, and an 'Update' button is next to it. The 'CRM Details' section shows 'CRM URL', 'CRM Version' (9.2), 'Organization', and 'User License' (5).

Multi-language Map

This helps to load Bing maps in the language that is set in the User Interface Language. This is enabled as the user configures Maplytics.



French Language

Note:

- ***If user selects a language other than those supported in Maplytics, the map will load in default English language***
- ***To setup Multi-language map, user needs to click on configure at least once after importing Maplytics solution***

- Upon successful completion, it will open a tab with Team Maplytics created. The user needs to add required Member to the Team as shown below;

Note: We're auto assigning 'Maplytics User' role to Team 'Maplytics'.

- To customize Maplytics, please make sure to assign 'Maplytics Admin' security role to the required member. Please find the below-mentioned description of Maplytics' s security roles:

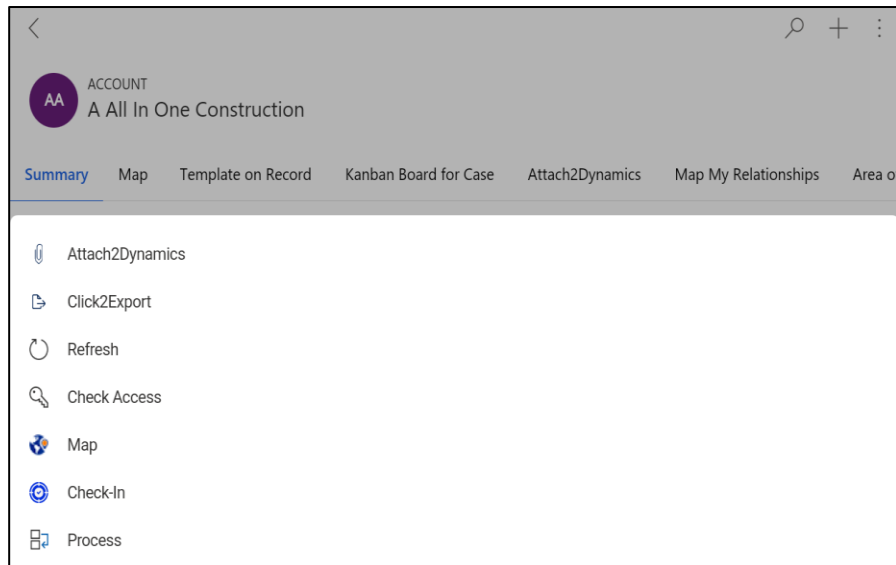
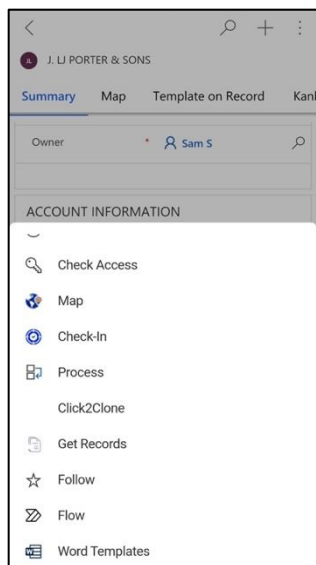
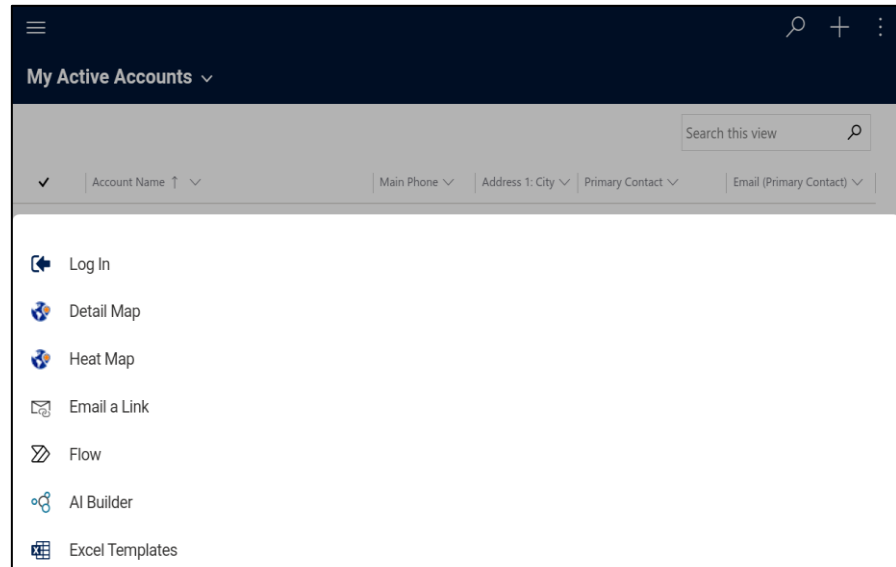
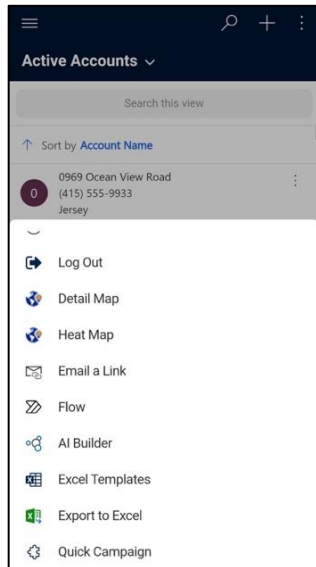
Maplytics Admin: Assign this security role to Administrator/s of Maplytics where they can have access to all custom entities specific to Maplytics like entity map, etc. Admin role should be assigned to an individual who would be involved in configuring and creating Entity Maps and Dashboards for Maplytics.

Maplytics Users: Assign this security role to all other users who would be only using Maplytics.

Maplytics Territory manager: Assign this security role to all the users who would be using Territory management.

Maplytics on Tablet / Mobile

For Dynamics 365 v9.0/CDS, Maplytics can be accessed from the Entity homepage and entity form using the 'Detail Map', 'Heat Map' and 'Map' button respectively.



Mobile

Tablet

Maplytics Configuration Details (Personalization)

Maplytics configuration record will be created for each member of Team Maplytics and one default record where no user will be assigned. To delete Maplytics Configuration record for any user, please remove the required user from Team Maplytics. This will auto-delete the record from CRM and to add a record; please add the required user to Team Maplytics.

Go to **Setting > Maplytics Configuration Details > Default Configuration Detail record**

✓	User	Product Name	Dist...	Ma...	Su...	Default Lo...	Hea...	Live...	Opt...	Plot...	Rec...	Z
	Peter Asht.	Maplytics	Mile	Road	City	50 Perkio...	Boundary	No	No	Non Cluster	50	
	John Parke	Maplytics	Mile	Road	City	---	Boundary	No	No	Non Cluster	50	
	---	Maplytics	Mile	Road	City	---	Boundary	No	No	Non Cluster	50	
	Bal P	Maplytics	Mile	Road	City	---	Boundary	No	No	Non Cluster	50	

Note: By default, all fields within the Configuration records will be locked in Classic mode. To change the values within the Configuration, please switch to UCI mode.

General

Distance Unit: User can select the default option for distance measuring. Options are **Miles and Kilometers**.

Region Area Unit: Default unit for area of the regions plotted using shape/excel file can be selected from the options Acre, Hectare, Square feet, Square Kilometer, Square Meter, Square Mile, Square Yard.

Map mode: User can select the default Map mode as Road mode or Aerial mode

Plot Data: This helps the user to define the default plotting of data. The user can choose from the following options;

- **Cluster:** This will group nearby data
- **Non-Cluster:** This will plot CRM data as individual pushpin

Optimize Direction: This option will help the user to create an optimized route by default.

Along the Route Distance: The user can select the default value for Along the Route search. The user can add any value up to 25.

Live Traffic: The user can opt to see live traffic status as default when the route is created.

Current Location: The user can define the default location using this option.

Route Option: The user can define the best way to determine a route, i.e., shortest time or shortest distance.

Navigate in: The user can select either of the applications Google or Waze, to navigate the plotted route.

Map Center: This is set from the Detail Map screen using the '***Set Zoom Level and Map Center***' option from the contextual menu. Zoom Level and Map Center will define the default location to zoom when the Detail Map is opened.

Records Per Page In Grid: The user can select the number of records to be visible in Maplytics '***View Data***' grid.

Heat Map Type: This allows the user to select the default option for Heat Map. Options are '***Boundary***' and '***No Boundary***'.

Summary Grouping: User can also select the Default option for the region type for Heat Map.

Zoom Level: This is set from the Detail Map screen using the '***Set Zoom Level and Map Center***' option from the contextual menu, i.e., right click on the map to access the contextual menu.

User: Name of the user to whom this record belongs to. This is a '***Read-Only***' field.

Default template: This option will allow user to open Detail map with predefined search criteria in 'Plot card'. User can select a default template into Maplytics configuration details as shown below. Please refer to 'Default template' section in user manual to know how Default template works.

Maplytics Security Template: System admin and Maplytics admin can provide selective access of Maplytics actions to the Maplytics users. They can select the relevant Mass actions & other actions and provide the access of the same to the respective Maplytics Users/Teams on the map. Refer to Maplytics Security Template section in User Manual.

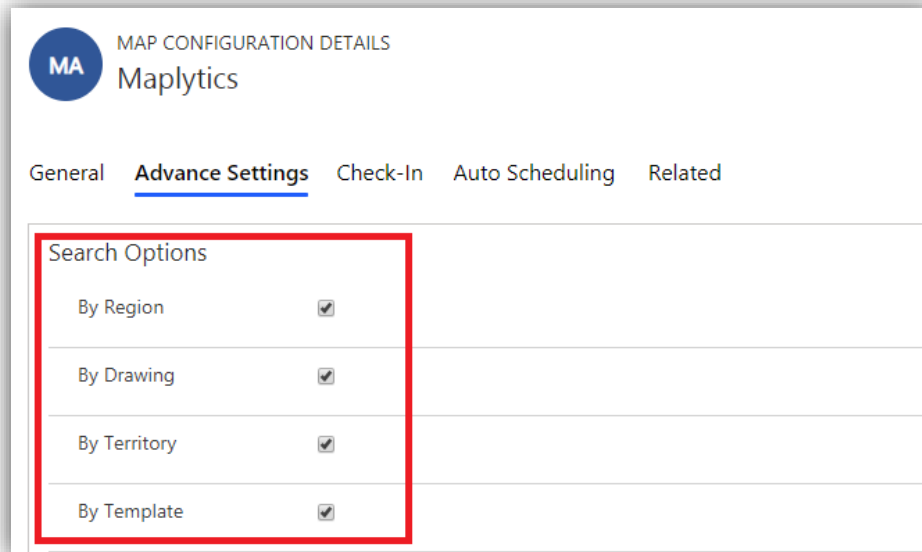
Set as Origin: User can set default origin for Route management.

Set as Destination: User can set default destination for Route management.

Advanced Settings

Search Options

Here, the Maplytics Admin can configure the **'Search Option'** for the whole organization. Admin can enable/disable the search options from here.



Note: “By Location” option is selected as the default option. The user has the option to choose among other four: By Region, By Drawing, By Territory and By Template. It is recommended to keep all the options enabled.

User can set their own preferences in their Configuration Detail record as mentioned below:

Configure options

System admin and Maplytics admin can enable the following options to let the functionalities work the required way.

Enable Travel Distance: While searching of records within a specified Proximity from a location, enabling this option will make the option of ‘Show Travel distance’ visible on the Plot record card.

Enable Truck Route: Enable option to start using Truck routing as mentioned in the user manual.

Map in a New window: Enable this option to open the map in a new window instead of opening on the same page while clicking on any Maplytics map button.

Show All Territories: Enable this option to enable the users to view all the territories available in the CRM. By default, this option will be deselected which means the users will be able to view only those territories for which they are the Territory Manager or the member.

Enable Territory Assignment Rule: If there is a need for assigning territories or owner to the CRM records based on specific conditions, this option can be enabled to start creating rules and assigning territories or owners based on the rules.

Enable Multiple territories: If users use multiple territories created for the same location, this option can be enabled to create/view multiple territories. Once this option is enabled, it cannot be disabled again.

Maplytics
Map Configuration Details

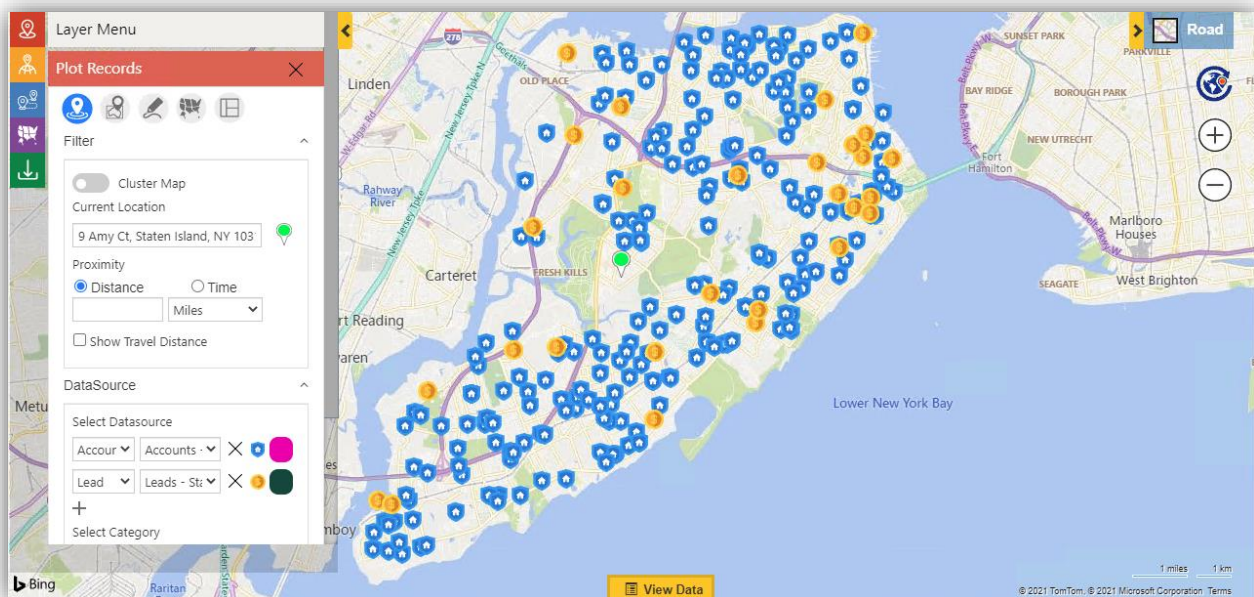
General
Advance Settings
Check-In
Auto Scheduling
Real-Time Tracking
Related

Configure option

Enable Travel Distance	<input checked="" type="checkbox"/>	Enable Truck Route	<input checked="" type="checkbox"/>	Map in New Window	<input type="checkbox"/>
Show All Territories	<input type="checkbox"/>	Enable Territory Assignment Rule	<input type="checkbox"/>	Enable Multiple Territories	<input checked="" type="checkbox"/>

Define images for pushpins

System administrator can upload desired images for the pushpins to represent the respective records. This will help the user to visualize the entity records with the desired pushpins on the map.



Please go to **Settings > Maplytics Configuration Details > Select default Maplytics Configuration record > Define Images for pushpins**

User can browse the file(s) for the icons that are needed to be uploaded and click on 'Save'.

Define images for pushpins

Browse Image

Choose Files No file chosen

Supported file formats: .svg, .png, .jpg, .jpeg
Files must be less than 20*30 pixels.

Define images for pushpins

Browse Image

Choose Files Accounts.jpg

Supported file formats: .svg, .png, .jpg, .jpeg
Files must be less than 20*30 pixels.

Save Image(s)

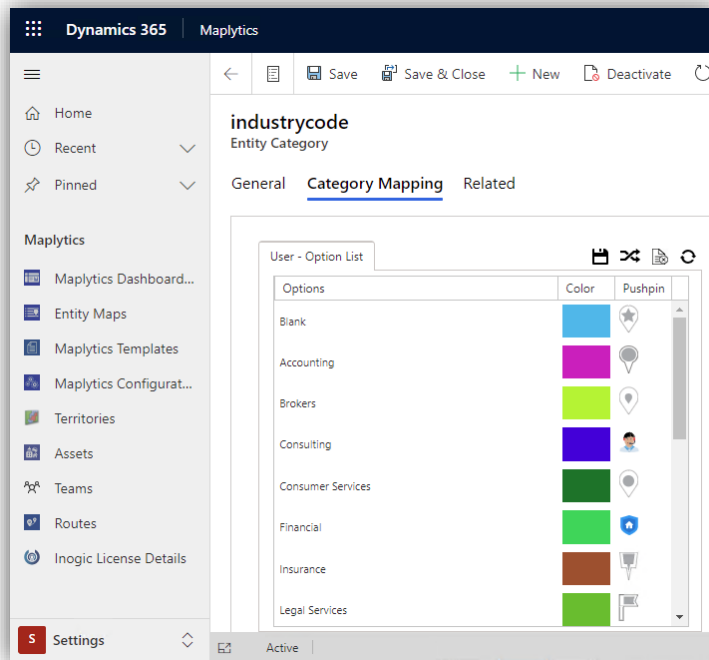
Images	Action

Note:

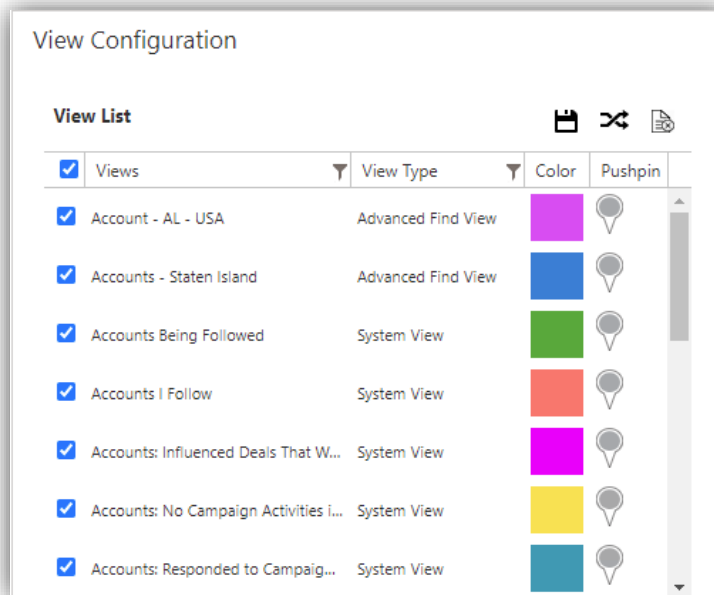
- **Supported file formats: .svg, .png, .jpg, .jpeg.**
- **Files must be less than 20*30 pixels.**

After saving the desired pushpins, user can set these images for any of the entity views or categories to represent the respective records. To set the images for the records, follow the steps mentioned below:

- **Set pushpins for categories:** Go to Settings > Entity maps > Required Entity map > Category Configuration > Required Category > Select desired pushpins for different ranges of the category



- **Set pushpins for views of entities:** Go to Settings > Entity maps > Required Entity map > Configuration > View configuration > Select pushpins for views of the Entity



Proxy URL: If the user uses Proxy servers for accessing the Internet on the CRM server, please provide the Proxy URL so that the application can perform calls to the Bing Maps site.

In case of the proxy setting, the plugins need to be registered out of the sandbox and by default the solutions provided by us register the plugins in Sandbox isolation mode. You can find these steps towards the end of this manual.

Check-In

User can select the settings for the feature of Check-In. Please refer to the section of Check-In/Check-Out in the User manual to know more details about the options here.

Auto scheduling

System admin and Maplytics admin can set the default settings for Auto Scheduling in the Default Maplytics Configuration Detail record. They can also set the start time as the default start time for the first activity as well as default values for other preferences for Auto Scheduling.

Go to Maplytics App > Settings > Maplytics Configuration Details > Default Configuration details record for the user > Auto Scheduling

Maplytics

Map Configuration Details

General

Advance Settings

Check-In

Auto Scheduling

Real-Time Tracking

Related

Start Time	8:00 AM	End Time	5:00 PM
Period	3 Day	Duration	75 Minutes
Break	1:00 PM	Break Duration	60 Minutes
Buffer Time	15 Minutes		
Schedule first activity at start time	---	Schedule Existing Meetings	<input checked="" type="checkbox"/>

Maplytics
Map Configuration Details

General Advance Settings Check-In Auto Scheduling Real-Time Tracking Related

Working Days

Mon	<input checked="" type="checkbox"/>	Tue	<input checked="" type="checkbox"/>
Wed	<input checked="" type="checkbox"/>	Thu	<input checked="" type="checkbox"/>
Fri	<input checked="" type="checkbox"/>	Sat	---
Sun	<input type="checkbox"/>		

Admins can also select the Activities that are needed to be considered while Considering Existing Meetings in Auto Scheduling. If no Activities are selected here Auto Scheduling will consider all the Activities while Considering Existing Meetings. If Admins have selected Activities here then only selected activities will be considered while Considering Existing Meetings in Auto Scheduling.

Maplytics
Map Configuration Details

General Advance Settings Check-In Auto Scheduling Real-Time Tracking Related

Auto Schedule Activities Configuration

Select Entity

Select View

Entity Name	Entity View	Remove
Appointment	All Appointments	<input checked="" type="checkbox"/>
Bookable Resource Booking	Active Bookable Resource Bookings	<input checked="" type="checkbox"/>

Users can also set the default settings for Auto Scheduling in their respective Maplytics Configuration Detail record.

Go to Maplytics App > Settings > Maplytics Configuration Details > Configuration details record for the user > Auto Scheduling

Maplytics

Map Configuration Details

General **Auto Scheduling** Related

Start Time	8:00 AM	End Time	7:00 PM
Period	5 Day	Duration	60 Minutes
Break	1:00 PM	Break Duration	30 Minutes
Buffer Time	15 Minutes		

Maplytics

Map Configuration Details

General **Auto Scheduling** Related

Working Days			
Mon	<input checked="" type="checkbox"/>	Tue	<input checked="" type="checkbox"/>
Wed	<input checked="" type="checkbox"/>	Thu	<input checked="" type="checkbox"/>
Fri	<input checked="" type="checkbox"/>	Sat	<input type="checkbox"/>
Sun	---		

Real-Time Tracking

System admin and Maplytics admin can enable the feature of Real-Time Tracking in the Default Maplytics Configuration Detail record. They can also set the default settings such as Refresh interval and start & end time for the tracking.

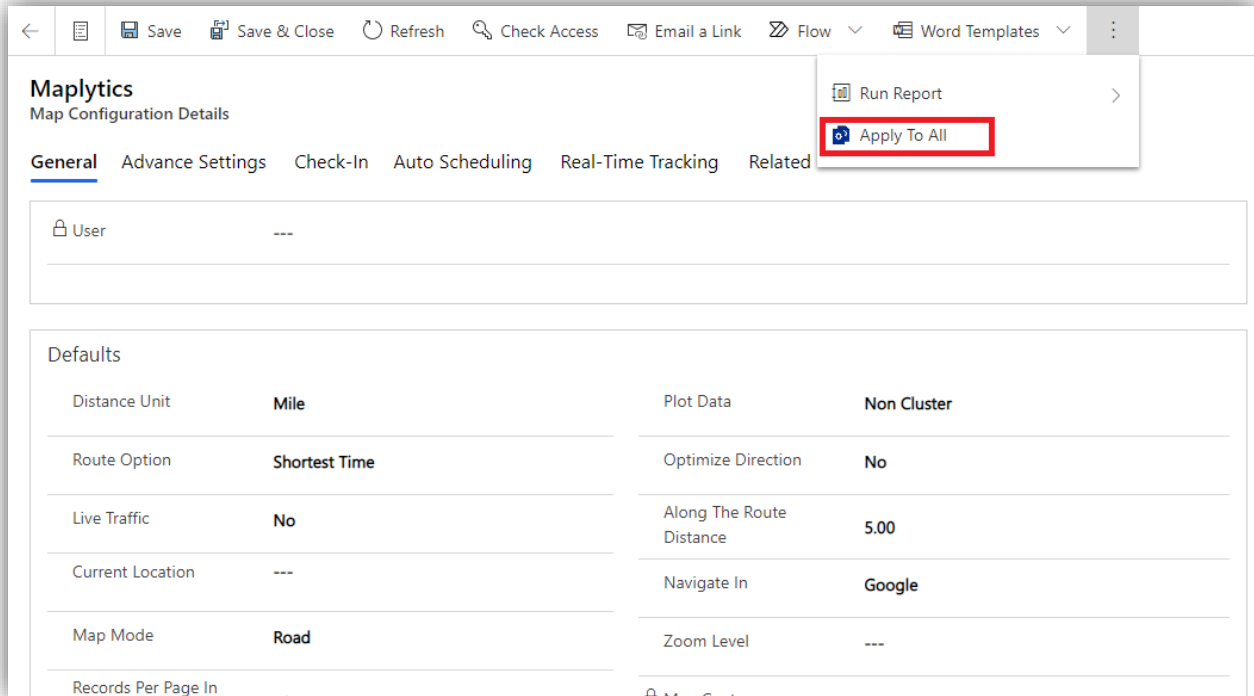
Maplytics - Saved
 Map Configuration Details

General Advance Settings Check-In Auto Scheduling **Real-Time Tracking** Related

Enable Real-Time Tracking	<input checked="" type="checkbox"/>									
Refresh Interval (Seconds)	*	30								
Monday Tracking Start Time	12/13/2021		8:00 AM		Monday Tracking End Time	12/13/2021		10:00 PM		
Tuesday Tracking Start Time	12/14/2021		8:00 AM		Tuesday Tracking End Time	12/14/2021		10:30 PM		
Wednesday Tracking Start Time	12/15/2021		8:00 AM		Wednesday Tracking End Time	12/15/2021		10:30 PM		
Thursday Tracking Start Time	12/16/2021		8:00 AM		Thursday Tracking End Time	12/16/2021		11:30 PM		
Friday Tracking Start Time	12/17/2021		8:00 AM		Friday Tracking End Time	12/17/2021		11:30 PM		
Saturday Tracking Start Time	12/18/2021		8:00 AM		Saturday Tracking End Time	12/18/2021		11:30 PM		
Sunday Tracking Start Time	12/19/2021		8:00 AM		Sunday Tracking End Time	12/19/2021		11:30 PM		

Apply to all

'Apply to All' feature provides the Admin the ability to override all the user personalization for the attributes like Distance Unit, Summary Grouping, Map Mode, Plot data, Records Per page In Grid, Zoom Level, etc. and apply Maplytics Default configuration to all the User Personalization records.



The screenshot shows the Maplytics Map Configuration Details interface. The top navigation bar includes buttons for Save, Save & Close, Refresh, Check Access, Email a Link, Flow, and Word Templates. A dropdown menu is open, showing 'Run Report' and 'Apply To All' (highlighted with a red box). The main content area has tabs for General, Advance Settings, Check-In, Auto Scheduling, Real-Time Tracking, and Related. The 'General' tab is active, showing a 'User' field and a 'Defaults' section with various configuration options.

Defaults	
Distance Unit	Mile
Route Option	Shortest Time
Live Traffic	No
Current Location	---
Map Mode	Road
Records Per Page In	---

Note: The user cannot undo this action. Proceed with caution.

Setup Entity Map

Maplytics entity map is defined differently for different entities. We can classify the entities in CRM as activity type and non-activity type. Please see the below mentioned description for the same:




- **Non-Activity Type Entity:** For these types of entities, there are two ways to build the entity map.
 - **An entity with own address attribute:** We take the address information from the field attributes defined in '**Attribute Mapping**' section. Examples of this type of entities are; Accounts, Leads, Contact, etc.
 - **An entity without own address attribute:** These are linked entities like opportunity, case, etc. that do not have their own address but are linked to account or contact. Please use '**Link To**' field while defining entity map for these kinds of entities.
- **Activity Type Entity:** As OOB Activity type of entities, generally do not have their address of their own, we have provided the respective entity maps which helps to plot the entity records based on the default value "regarding" provided for the field 'Link To'. As due to the regarding id the addresses can be fetched from multiple entities, we have made the section of attribute mapping section for addresses unavailable by default. Examples of these type of entities are; Appointment, Task, etc. For such entities, there are further two ways to build the entity map.
 - **An entity with own address attribute:** If an Activity entity has its own address on the basis of which the records are needed to be plotted, the user can remove the default value provided for the field 'Link To'. This will make the 'attribute mapping' section for addresses available, into which the user can provide the address fields of the Activity entity. We take the address information from the field attributes defined in '**Attribute Mapping**' section to plot the records on the map.
 - **An entity without own address attribute:** If the Activity entity do not have their own address but are linked to any other entity, please use 'Link To' field while defining entity map to get the records plotted with the linked entity addresses.

To plot Map for any entity, first you have to create the entity map for that entity. Navigate to **Settings > Entity Maps > New**

General

account - Saved
Entity Map

General Attribute Mappings Tooltip Mapping Category Configuration Configuration Advanced Settings

Entity Name	Account	Link To	---
 Total Records	3307	Create New Record	Yes
 Geocoded Records	3011	 Enable Check-In	Yes

Entity Name: Select the name of the entity

Link To: If there are no address of an entity or the user wants to fetch the address from another entity then the user has to specify the link to attribute.

For example: To plot the opportunity records if the user wants to refer the address from the customer, i.e., from Account/Contact, then within the entity map of as “Opportunity” and “Potential Customer” should be selected in the ‘link to’ field.

Create New Record: Select ‘Yes’ if you would like to create a new record for any point on the map to save within Dynamics CRM.

Note: These records will only be created for the entities having its own address fields.

Total Records: This shows how many total records are present in the entity.

Geocoded Records: This shows how many records are geocoded in the entity.

Get Geocode Count: While opening the entity map, the values in the fields ‘Total Records’ and ‘Geocoded Records’ will be zero(0) by default. To get the updated values in the same, admins can click on the ‘Get Geocode Count’ button from the ribbon bar.



Attribute Mapping




Admins can provide the address here based on which the records should be plotted on the map.


account - Saved
 Entity Map




General **Attribute Mappings** Tooltip Mapping Category Configuration Configuration Advanced Settings Territory Assignment Rules Related

Title	Account Name	Area of Service	---
Template	---		

Address Name	Billing address	 
Address Line 1	Address 1: Street 1	Set As Default <input checked="" type="checkbox"/>
Address Line 2	Address 1: Street 2	State Address 3: State/Province
Address Line 3	Address 1: Street 3	Zip Code Address 1: ZIP/Postal Code
City	Address 1: City	Country Address 1: Country/Region
Phone	---	Longitude Address 1: Longitude
Email	---	Website ---
Territory	---	Land Area Mapping ---
Entity Image	---	Override Territory ---

Address Name	Shipping address	  
Link To	---	Set As Default <input type="checkbox"/>
Address Line 1	Address 2: Street 1	State Address 2: State/Province
Address Line 2	Address 2: Street 2	Zip Code Address 2: ZIP/Postal Code
Address Line 3	Address 2: Street 3	Country Address 2: Country/Region
City	Address 2: City	Latitude Address 2: Latitude
County	---	Longitude Address 2: Longitude

 Add New Address

- **Title:** Select the field attribute which you would want to see while hovering on a pushpin on the map.
- **Area of Service:** Select the field of Area of Service. Please refer to the section of Area of Service in the User manual.
- **Template:** Select the name of template field. Please refer to the section of Saved Template Visualization in the User Manual.
- **Address attributes mapping:** Select the address fields to be used to plot the entity records on the map. Admins can add more than one address for an entity so as to plot the same entity with multiple addresses. They can click on the 'Add New Address' button to add another address. A maximum of 4 addresses in total to be plotted for the same entity. While adding a new address, a random color and pushpin will be set by default. Admins can further select the desired pushpin  and the color  for the respective address. They can also click on 'Remove'  to delete an address that was added.

Note:

- *If colors and pushpins are selected in the Category configuration section of Entity map as well as the Address Attribute section, then the colors and pushpins will be plotted on the map based on the Category configuration.*
- *If colors and pushpins are selected in the View Configuration section of Entity map as well as the it's Address Attribute section and the user selects address(es) to plot the records from the dropdown option then the colors and pushpins will be plotted on the map based on the Address attribute settings.*
- *If colors and pushpins are selected in the View Configuration section of Entity map as well as the it's Address Attribute section and the user does not select any address to plot the records from the dropdown option then the colors and pushpins will be plotted on the map based on the View Configuration settings.*
- *If 'Set as default' option is not selected for any of the addresses added then the records will be plotted based on the first address by default.*

- **Address Name:** Enter the name for the address. This will help to differentiate the pushpins plotted on the map based on different addresses.
- **Set As Default:** Admins can select this option to set the respective address as the default address to be fetched for the entity while plotting the records.
- **Link To:** The Link to option in the 'General' tab will be applicable for the first address. The link to attribute can be specified for the other addresses as well in order to fetch the address from another entity while plotting the records.
- **Territory:** Select the name of the territory field.
- **Territory relationship:** If the user has enabled the option of multiple territory within the Default Configuration Detail record, the field 'Territory' mentioned above will be replaced with 'Territory relationship'. Select the relationship for the entity with the territory here.

- **Override Territory:** Select the field created in the entity record form for Override territory. Based on the value of the respective field in the record form it will be decided whether the existing territory(ies) will be overwritten or not while assigning territories to the records.
- **Land Area Mapping:** Select the relationship of respective entity with Geography entity here so as to use the feature of Land Area Mapping and view lands assigned to the records.
- **Entity Image:** While hovering or clicking over a pushpin, users can also view the image of the record if the image is added. Select the 'Default Image' field here to view the record image on hover and tooltip card.

Note: *In order to get accurate geo-coordinates,*

- *Latitude & Longitude fields are mandatory.*
- *Other fields highlighted with '+' are recommended.*

Tooltip mapping

To configure the tooltip, Maplytics provides the Tooltip mapping UI. This is visible whenever the user clicks on a particular pushpin on the Detail Map. Maplytics populates all the public views of an entity that you specified in the Entity Name. The user can select a view from '**Select View**' drop-down. Selected view data fields will be populated in the '**Available Fields**' box, and the user can select those columns which one likes to see in the '**Selected Fields**' box.

Note: Before using ToolTip Mapping configuration, fill up all data till Attribute Mapping and click on Save button and refresh the page to see available options.

Follow the below steps to configure tooltip

1. Select the view for selecting the fields to be displayed for Tooltip. Example, select **My Active Accounts** view from '**Select View**' drop-down;

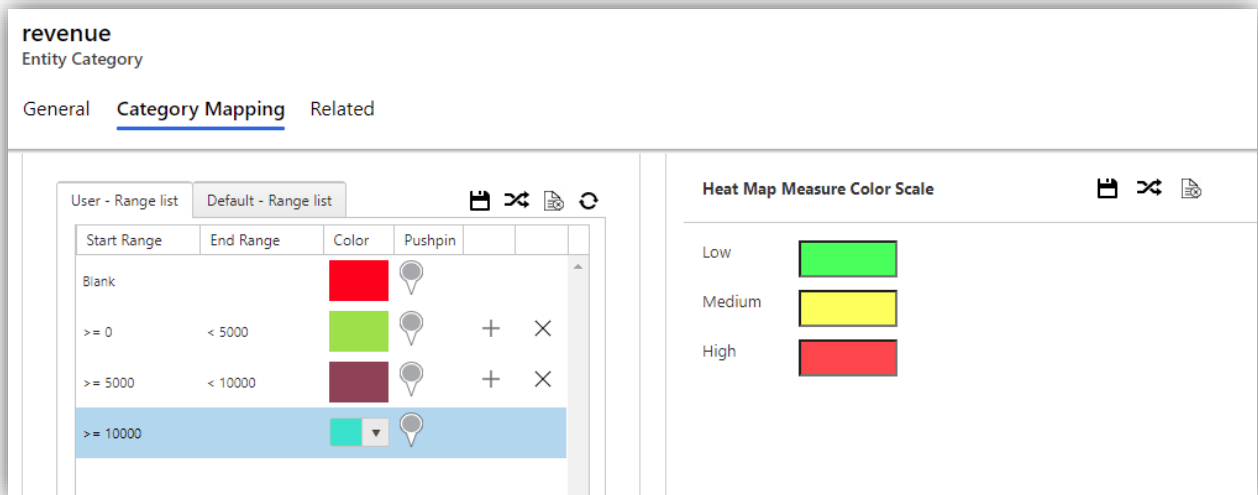
2. Select the attribute to be added. After selecting any attribute, its display name is automatically displayed in the Label. Users can change that label as per their choice. Then click on the **forward arrow(>>)** button to add an attribute to the Selected Fields as shown in below screenshot;

Note: To add more columns in "Available Fields" section of a particular view. Go to Setting > Customize the System > Select the required Entity and View > Add more columns and Publish all changes.

3. After configuring the attributes, click on the **‘Save’** button.

Category Configuration

The user can define the color and the shape for the parameters belonging to a particular field. For example, the user can set different color & shape for annual revenue (Blank, 0-200000, 200000-500000 and >500000). This is reflected while using the Category option on Detail Map. The user can define a category for all the date type except Image, Date and URL data type.



The user can also configure the Heat Map Measure color scale (Low, Medium and High). This will be reflected when the user selects the defined entity category on the Heat Map and the heat map visualization will be created based on the color defined here.

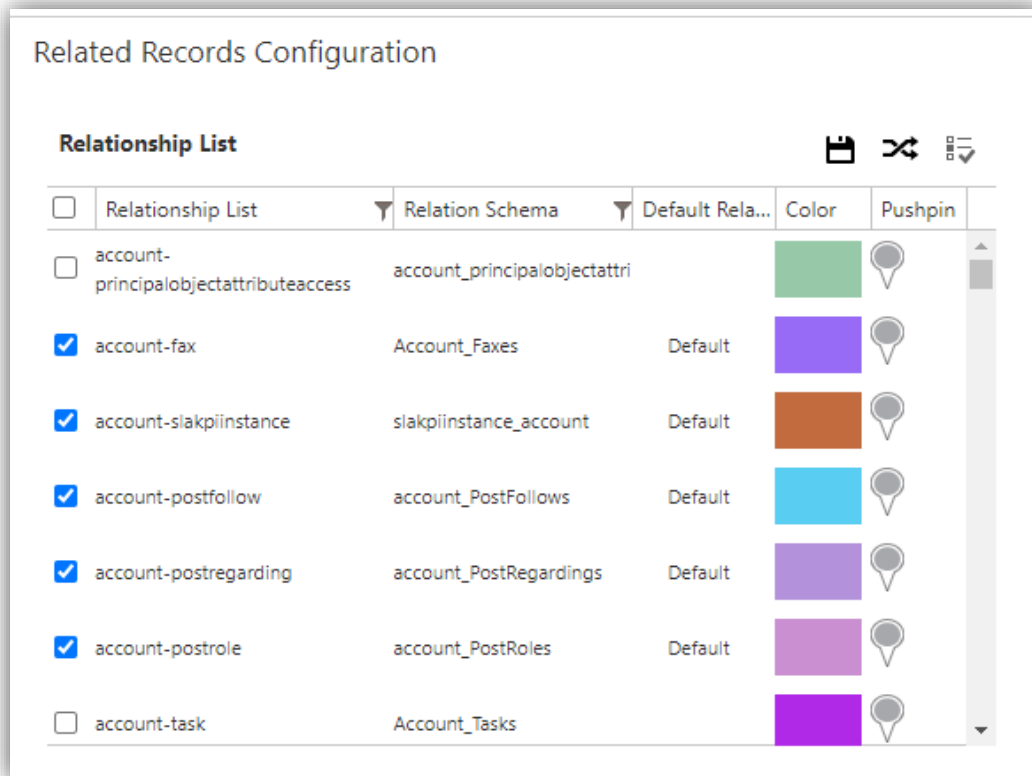
Note: The Heat Map Measure Color Scale configuration will be visible only for numeric field attribute category configuration.




Refer to the **User Manual (Pre-Defined Color Categories section)** for details on how to define the category. The user can also set the shape of category parameter as well.

Configuration

Related Record Configuration

This table is used to view the related/child records on Detail map/Individual map. It contains all the One to Many (1:N) relationships belonging to the respective entity. The users can select the relations that they would like to see on the Detail Map and Individual Map section within CRM records.

















- **Save**  : User can select the required Relationships that they want to view on map and then click on Save button to save the selection.
- **Auto-Set**  : User can click on this button to auto set the selection of colors and the icons for the pushpins.
- **Set as Default Relationship**  : User can select required relationships and set it as Default relationships that will be plotted by default on the Individual map whenever the user opens the map section in a record. At a maximum user can select five relationships as default.

View Configuration

This table is used to configure the color and the pushpin shape for views visible on the map. The table contains a list of views depending upon the user security role. Please find a brief description of the same below;

Maplytics Admin: The user with this role can set the color and shape for System Views, Marketing List, Maplytics Dashboards and their Personal Views. Admin can also select/de-select the System Views and Maplytics Dashboards at the organization level.

Maplytics User: The user with this security role can set the color and shape for their Personal Views and Marketing Lists only.


View List				Save	Refresh	Close
<input checked="" type="checkbox"/>	Views	View Type	Color	Pushpin		
<input checked="" type="checkbox"/>	API test	Advanced Find View				
<input checked="" type="checkbox"/>	Accounts - Staten Island	Advanced Find View				
<input checked="" type="checkbox"/>	Accounts Being Followed	System View				
<input checked="" type="checkbox"/>	Accounts I Follow	System View				
<input checked="" type="checkbox"/>	Accounts: Influenced Deals That We Won	System View				
<input checked="" type="checkbox"/>	Accounts: No Campaign Activities in Last 3 Mont...	System View				
<input checked="" type="checkbox"/>	Accounts: Responded to Campaigns in Last 6 M...	System View				

Once you make the changes, please click on the **'Save'** icon on top of the table.





Field Attribute List

This table provides the list of all the field attributes (OOB as well as custom) of the selected entity. Maplytics Admin can further choose the field attribute that should be available on the Detail/Heat Map as Category options. Once you make the changes, please click on the **'Save'** icon on the top of the table.

Category Attribute List

Attribute List 

<input checked="" type="checkbox"/>	Attribute
<input checked="" type="checkbox"/>	Account Name
<input checked="" type="checkbox"/>	Account Number
<input checked="" type="checkbox"/>	Account Rating
<input checked="" type="checkbox"/>	Address 1
<input checked="" type="checkbox"/>	Address 1: Address Type
<input checked="" type="checkbox"/>	Address 1: City
<input checked="" type="checkbox"/>	Address 1: Country/Region
<input checked="" type="checkbox"/>	Address 1: County
<input checked="" type="checkbox"/>	Address 1: Fax
<input checked="" type="checkbox"/>	Address 1: Email Address



1
1
2
...



1 - 40 of 161 items

Advance Settings

In this section, the user can further customize Maplytics for their organization.

Tooltip Card Actions

The user can define the Quick Action on the Tooltip card using this section. First Three actions are added as default (i.e., Change Owner, Open Record and Plot Related Record). We're not showing those actions here as these cannot be modified/deleted by the user. The user can define the other actions depending upon their choice.

Entity	DisplayName	Icon	Remove
Email	Email		×
Task	Task		×
Appointment	Appointment		×

Entity: Select the entity name from the drop-down. The list contains all the custom as well as OOB Activity type entities

Icon: Select the icon for this action

Display Name: Mention the display name to be visible while hovering over the icon. By default, it will be the display name of the selected entity. There is a character limit of 25.

Note: This will not be visible for the Activity type entity.

Summary Card

The user can define the field attribute to summarize in this section. The user can add a maximum of 5 attributes for the summary.

Attribute	Display Name	Aggregate Method	Remove
Annual Revenue	Annual Revenue	Average	X
No. of Employees	No. of Employees	Sum	X

Attribute: The list contains all the numeric field attribute (i.e., Floating, Decimal, Currency and Whole Number data type) for the required entity.

Aggregate Method: Two options are available to users – Sum or Average. If the user needs both options for a particular field, add two records for the same.

Display Name: Mention the name which you would like to see for this attribute. The summary method will be added by default after the Display name. For Example, Annual Revenue (Sum). There is a character limit of 25.

Hover Attributes

User can define the attribute that should be visible for a quick glance when you hover over a particular pin on the map.

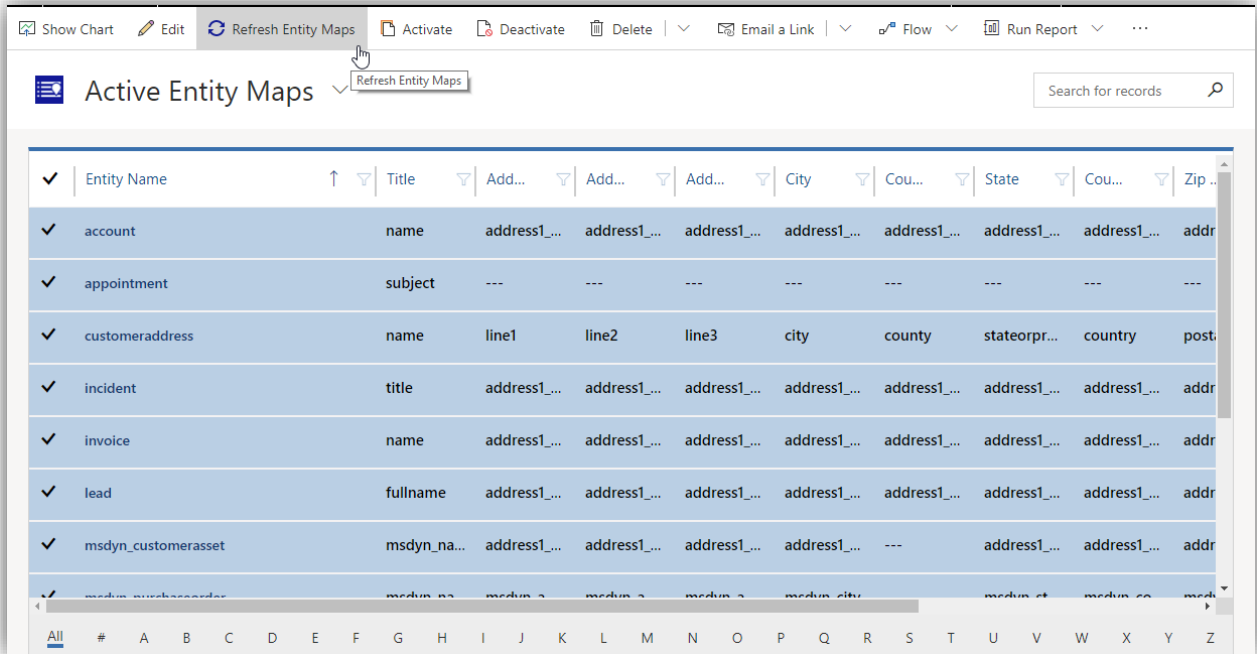
Attribute	DisplayName	Remove
Address 1	Address 1	X
Territory	Territory	X
Annual Revenue	Annual Revenue	X

Attribute: The list contains all the field attributes except the Image Data Type for the required entity.

Display Name: Mention the name that you would like to see for this attribute. By default, it will be the display name of the selected attribute. There is a character limit of 25.

Refresh Entity Maps

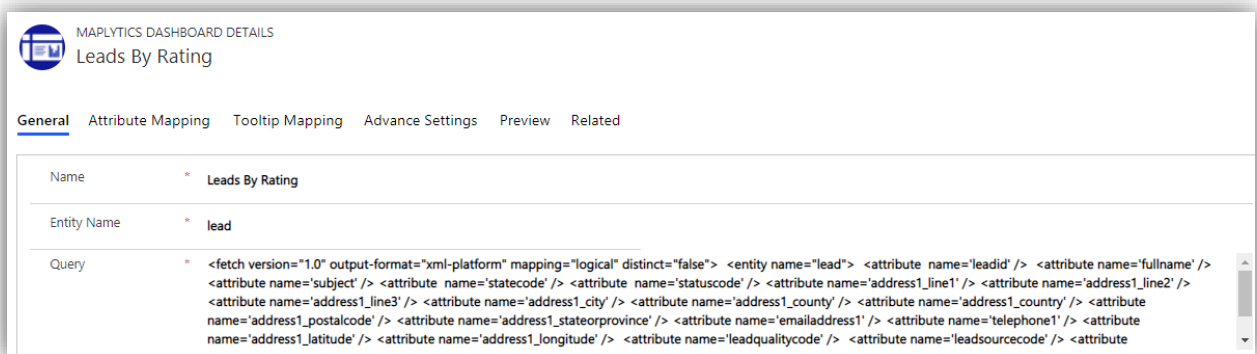
While updating the Maplytics solution, the existing users should select all the entity maps and click on 'Refresh Entity Maps'. This will refresh the Entity maps according to the Dynamics CRM settings and will help in seamless performance of Maplytics.



Setup Dashboard Details

Users can define their own Dashboard views for Maplytics and include them as web resources in standard Dynamics CRM Dashboards.

Navigate to **Settings ->Dashboard Details ->New**.



Name: Unique name for the Dashboard. The user will use this name to define the view to be included in the Dashboard.

Entity Name: logicalname of the entity. Name of entity for which the view is to be configured. For example, '*lead*'.

Query: FetchXML query to be executed for the view to be plotted on the Map. The user can create a query using Advanced Find and download generated FetchXML. Open this FetchXML in a notepad and set it here.

Note:

- *Make sure to include the latitude & longitude field attribute (address1_latitude & address1_longitude) in the query for the map to be able to read the geocoding information and plotting the map.*
- *If the user needs to create the fields for Latitude and Longitude, it should of data type: 'Floating Point Number' with precision set to 5. Add minimum to maximum range of fields respectively Latitude (+90 to -90), Longitude (-180 to +180).*
- *Open the downloaded FetchXML in Notepad before pasting it in Query field.*

In the queries, when the address data needs to be read from the customer (i.e., it could either hold an account or contact lookup) you need to provide the alias as 'maplyticsacc' when a link to a potential customer (account). For contact give alias as 'maplyticscont' when a link to a potential customer (contact) or If the address data needs to be read from another OOB or custom entities then you need to provide the alias as "map".

Mode: Choose the default mode in which the map should be presented. Choices available are **Aerial**, **Road**.

Show Route: This option is available when you choose '**Detail Map**' option in the Map Type. This provides a shortcut button on the Dashboard to quickly create the route. The user can build a route for maximum 25 waypoints.

Category: The logical name of the attribute to be used for categorization of the result set. Each unique value of the category would be plotted in a different color. This attribute should be present in the query.

Entity Category: Lookup of the entity category record if the user wishes to use the pre-defined colors for the categories.

Map Type: Decide if the user would like a Detail Map representation or a Heat Map representation of the result set.

If the user selects Heat Map in Map Type then the following options will appear on the Dashboard record:

Heat Map Type: The user can define Heat Map type as described below;

No Boundary: It creates a Heat Map on the basis of the density of the measure selected without geographical boundaries.

Boundary: This will create Heat Map on the basis of the selected region type like City, Postal Code, Country, State, etc.

Pie Chart: This will show a heat map with Pie charts plotted on the charts based on the heat of the attribute selected in the Measure and Filter.

Column chart: the data in the form of column charts plotted on the basis of the heat of the attribute selected in the Measure and Filter.

Summary Grouping: This field is used when the Map type is Heat Map. This helps the user to define the geographical summary criteria. The list contains following options; City, State, County, Country, Postal Code, Postal Code Areas, and Territory.

Measure: This field is also used for Heat Map. This helps the user to define the color scale of the Heat Map. For example, if the user wants to see the Heat Map on the basis of annual revenue, then please write the logical name of the same in this field. Higher the value, denser will be the map in that region.

Attribute Mapping:

In the attribute mapping tab, enter the attribute logical names of all the address fields to be used to plot the map. If the link to attribute is specified, then the address attribute should be of that linked entity. This is a case-sensitive field; the user needs to write the exact logical name without any mistake. It supports string, lookup and picklist values.

Tooltip Attribute:

To configure the tooltip, Maplytics have provided the Tooltip mapping UI. Maplytics will populate the public views of an entity that the user has specified in the Entity Name. The user can select a view from '**Select a view**' dropdown. As the user selects a view, Maplytics will populate the fields (columns) that have been defined for that view in the '**Available Fields**'.

Note: Before the ToolTip Mapping configuration, fill up all data and click on save button

Follow the below-mentioned steps to complete this configuration;

1. Select the view for selecting the fields to be displayed for Tooltip. For Example, select Open Leads view from '**Select View**' drop-down;

The screenshot shows the 'MAPLYTICS DASHBOARD DETAILS' page for 'Leads By Rating'. The 'Tooltip Mapping' tab is selected. Under 'Select View', 'My Open Leads' is chosen. The 'Available Fields' list includes 'Name', 'Topic', and 'Created On'. The 'Selected Fields' list includes 'Status Reason' and 'Company Name'. A 'Field Label' input field is present with '>>' and '<<' buttons for moving fields between the lists.

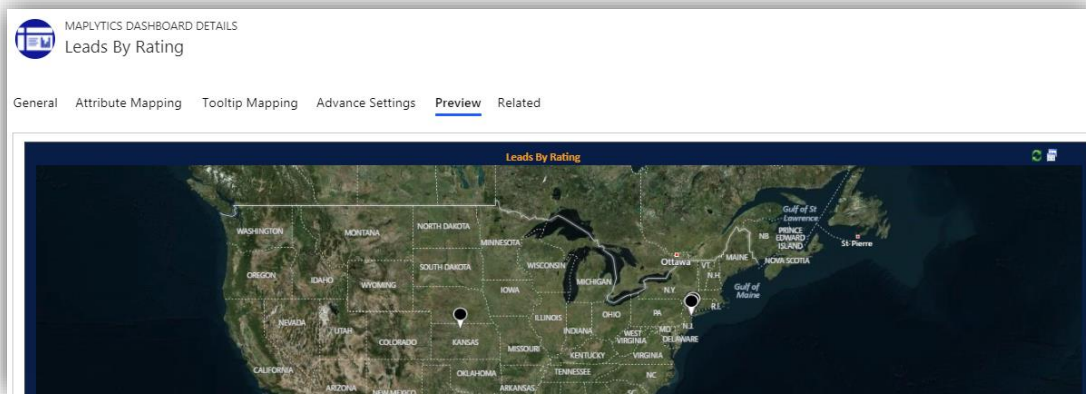
Note: To add more columns in 'Available Fields' section of a particular view; go to **Setting > Customize the System > Select the required Entity and View > Add more columns and Publish all the changes.**

2. Select the attribute to add, after selecting any attribute the display name of the attribute is automatically shown on the Label, the user can change that label as per their choice. Then click on **forward arrow(>>)** button to add an attribute to the Selected Fields.
3. After configuring the attributes, click on the **Save** button.

Advance Settings:

In this section, the user can configure the Hover Attributes and Heat Map Measure Color Scale for the dashboard. User can define the attribute that should be visible for a quick glance when you hover over a particular pin on the map. The user can also configure the Heat Map Measure color scale (Low, Medium and High).

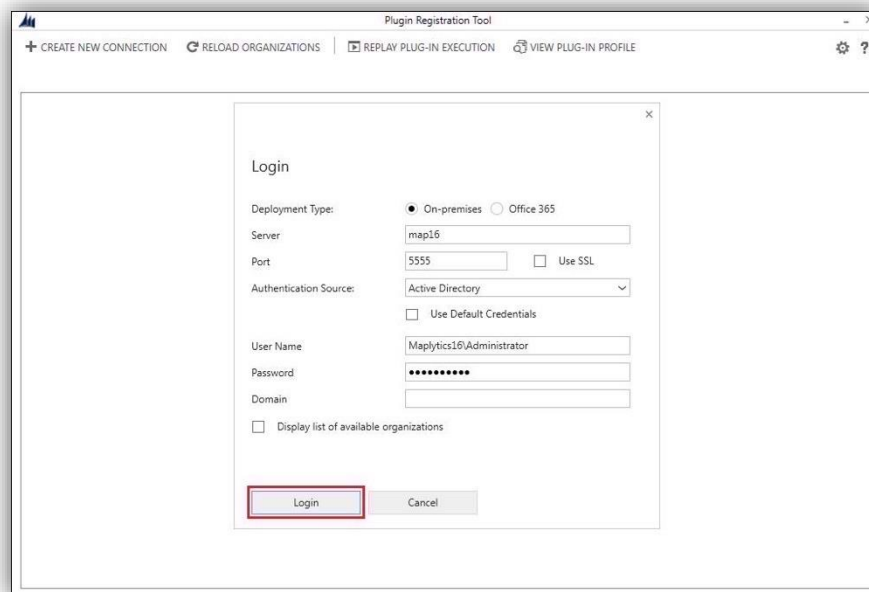
Refresh the page. On the Preview tab, a pushpin will be displayed, and the Configure attribute for tooltip will be displayed after clicking on the pushpin. See below screenshot;



Steps to update the Plug-in Assembly Registration

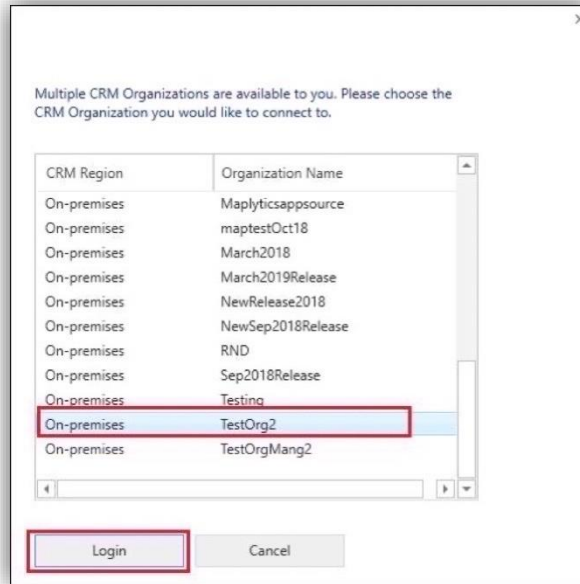
Note: You need to follow the below mentioned steps for changing the isolation mode of the plug-ins to none only when you are using Proxy server to access CRM. OTHERWISE, ignore the below steps.

1. Extract the downloaded zip folder for the solution to get Plugin Registration Tool folder.
2. Click on the 'PluginRegistration.exe' which you will get from Plugin Registration Tool folder, this will open the following window. Click on 'CREATE NEW CONNECTION' and enter connection information as shown in the below screenshot. Click on Login button.

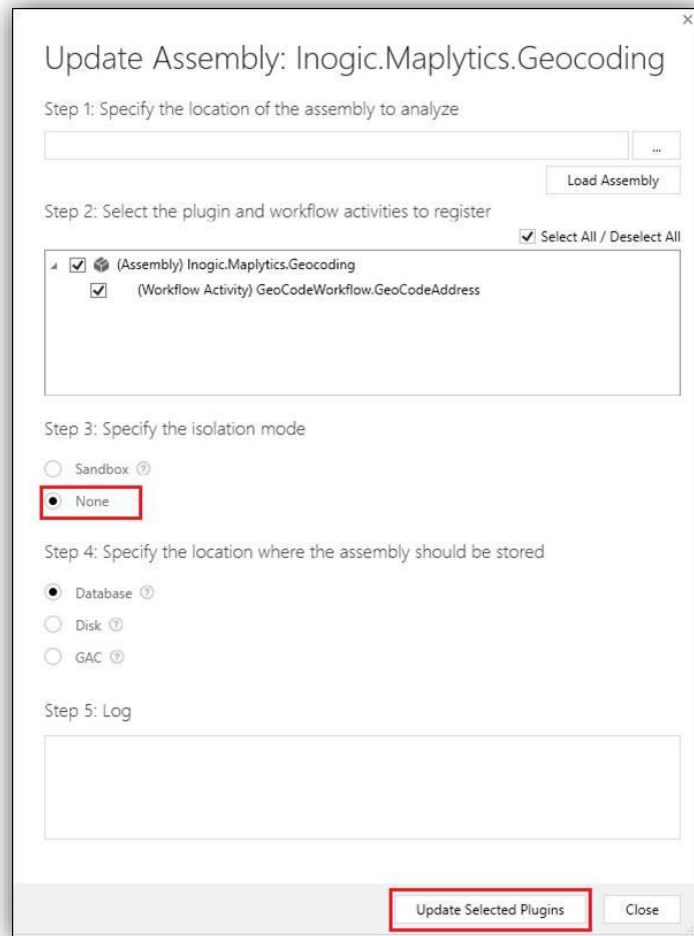


- Server: Name of the CRM server
- Port: Port number of CRM server

- User Name: The user name of CRM, i.e., DomainName\username
 - Password: Password of the CRM
3. After clicking Login, you will see the below screen where all the organizations available on your CRM server will be listed. Select the org where Maplytics is setup and click on the 'Login' button.



4. Double click on the '(Assembly) Inogic.Maplytics.Geocoding'. Change the Isolation mode from 'Sandbox' to 'None' and click on 'Update Selected Plugins'.



5. This would complete updating the desired changes for this plug-in to make them work outside Sandbox.

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