



**Product License Registration**



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

#### Activate

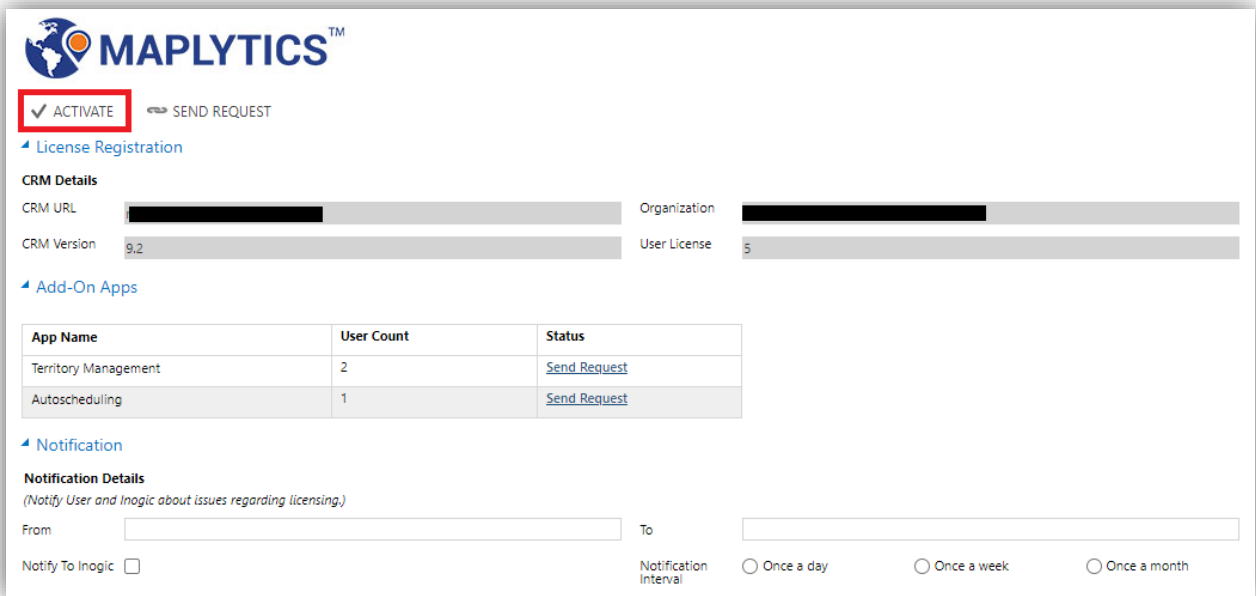
1. Navigate to **Settings > Advanced Settings > Maplytics section > License registration** to complete Maplytics configuration using the Configuration section of the solution.


The screenshot shows the Dynamics 365 interface with the Maplytics section selected in the top navigation bar. The left sidebar contains a list of Maplytics-related options, with 'License Registration' and 'Settings' highlighted. The main content area displays the 'License Registration' configuration page. At the top, there are buttons for 'ACTIVATE' and 'SEND REQUEST'. Below this, the 'License Registration' section includes 'CRM Details' with fields for 'CRM URL', 'CRM Version' (9.2), 'Organization', and 'User License' (5). The 'Add-On Apps' section contains a table with columns 'App Name', 'User Count', and 'Status'. The 'Notification' section includes 'Notification Details' with fields for 'From', 'To', and 'Notify To Inogic' (unchecked), and a 'Notification Interval' section with radio buttons for 'Once a day', 'Once a week', and 'Once a month'. At the bottom, the 'License Registration using (\*.lic) file' section shows the 'License Start Date' (4/27/2021) and 'License End Date' (7/11/2021). The status 'Active' is displayed at the bottom left.


App Name	User Count	Status
Territory Management	2	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

2. 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™ - License Registration



 **MAPLYTICS™**

☒ **ACTIVATE**  SEND REQUEST

License Registration

**CRM Details**

CRM URL  Organization

CRM Version  User License

Add-On Apps

App Name	User Count	Status
Territory Management	2	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

Notification

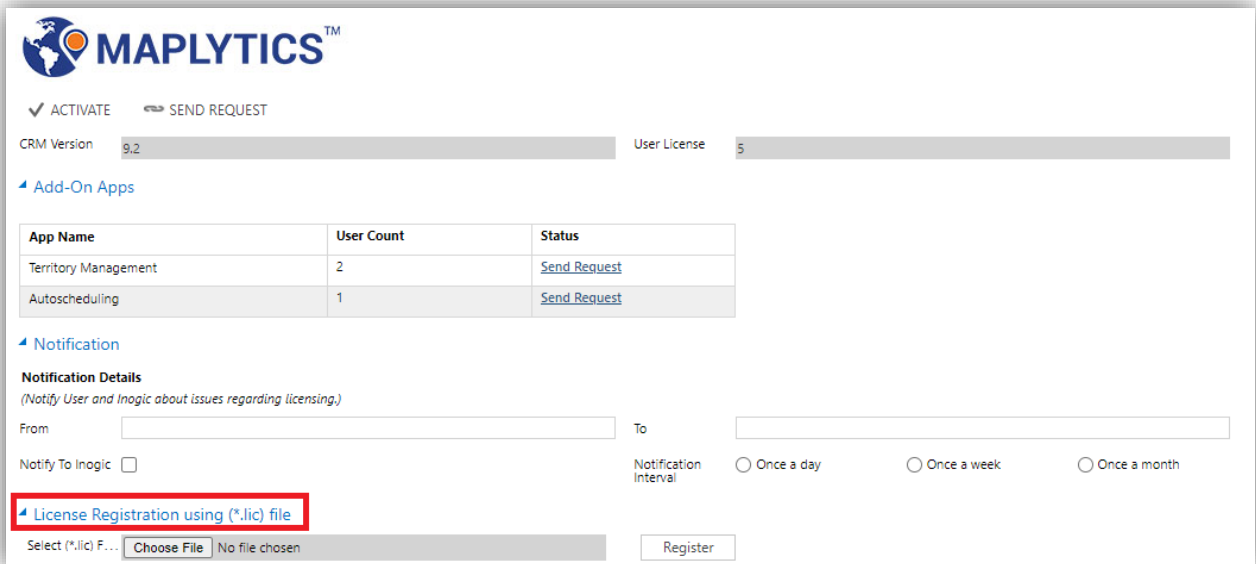
**Notification Details**  
(Notify User and Inogic about issues regarding licensing.)


From  To


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  User License

Add-On Apps

App Name	User Count	Status
Territory Management	2	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

Notification

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

From  To

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

## Maplytics™ - License Registration

### 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	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

**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

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

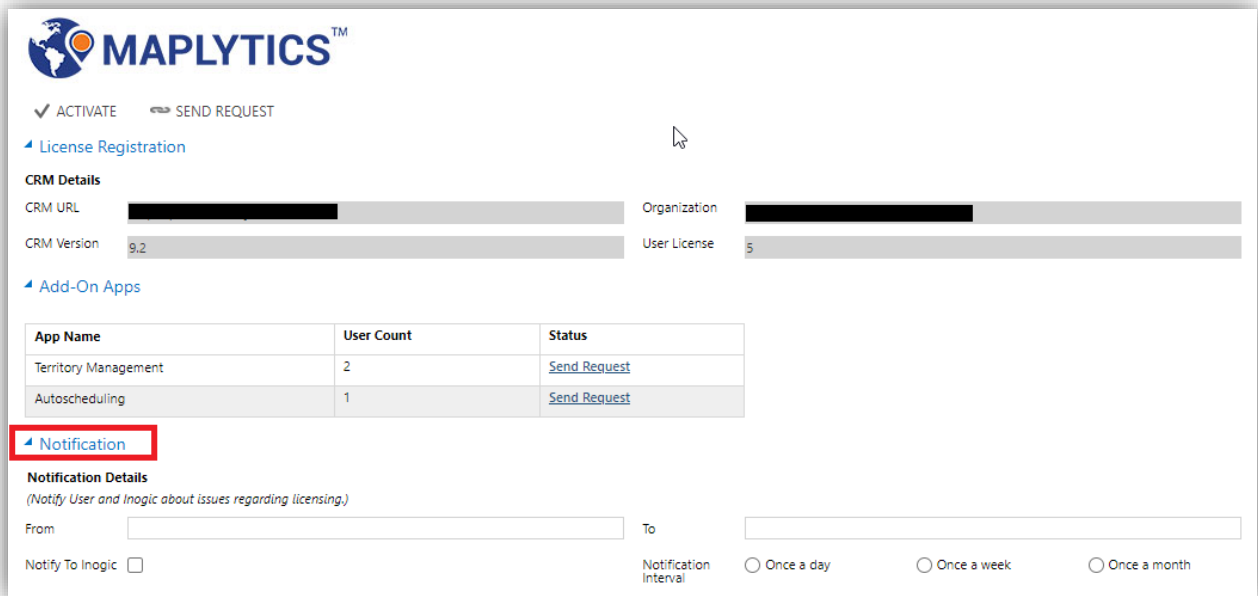
**From:** Select the user in your CRM who has email configured and can be used to send emails.

**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™ - License Registration



**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	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

**Notification**

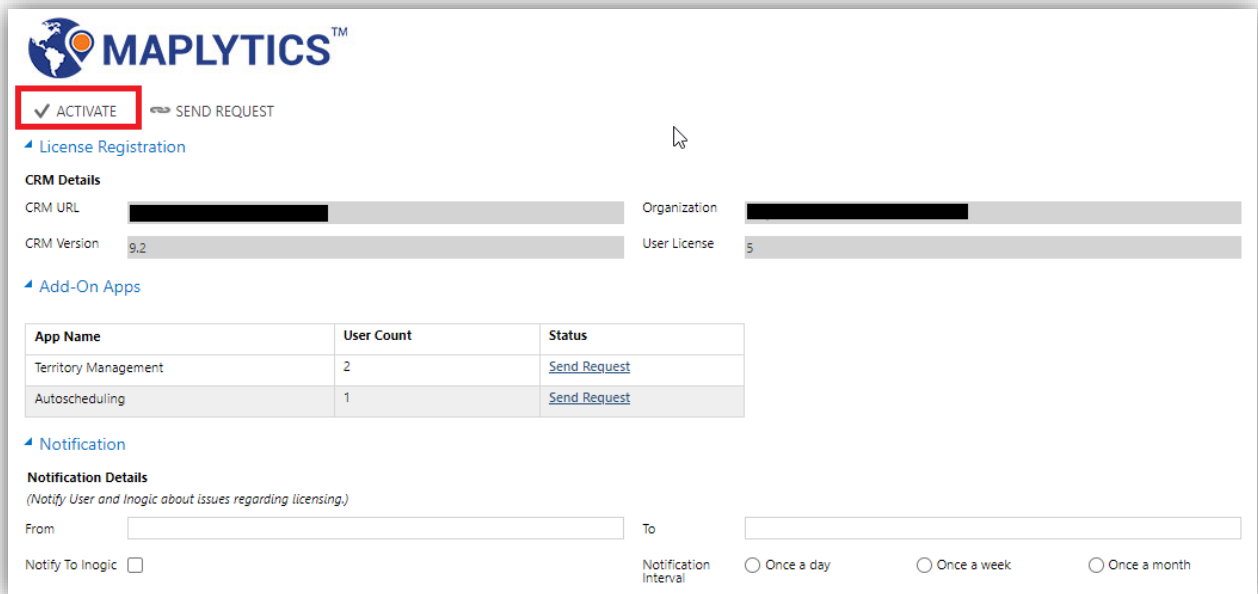
**Notification Details**  
(Notify User and Inogic about issues regarding licensing.)

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	<a href="#">Send Request</a>
Autoscheduling	1	<a href="#">Send Request</a>

**Notification**

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

From: [Redacted]    To: [Redacted]

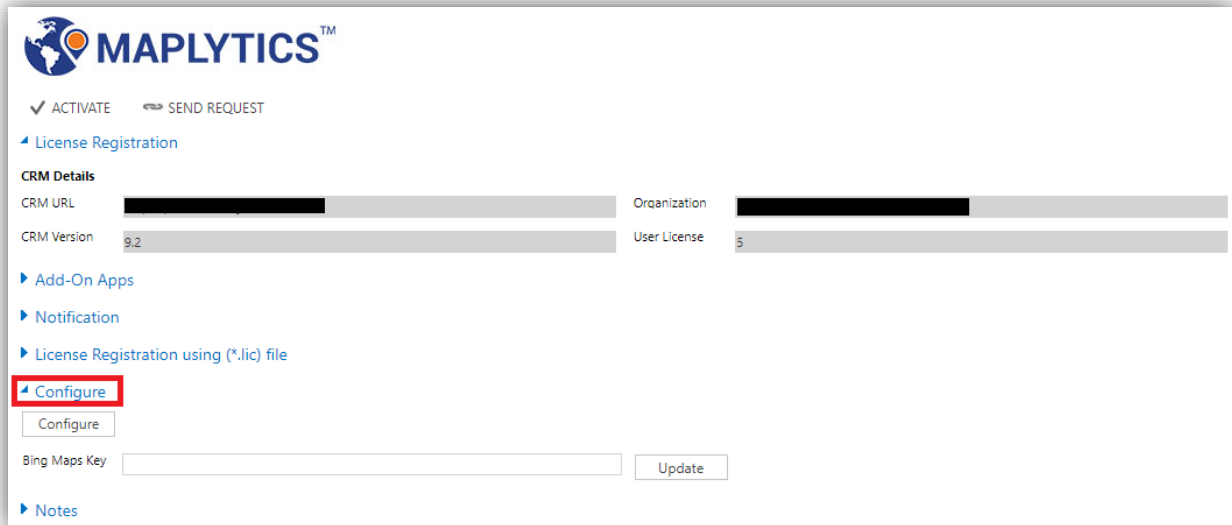
Notify To Inogic: ☐

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

## Maplytics™ - License Registration

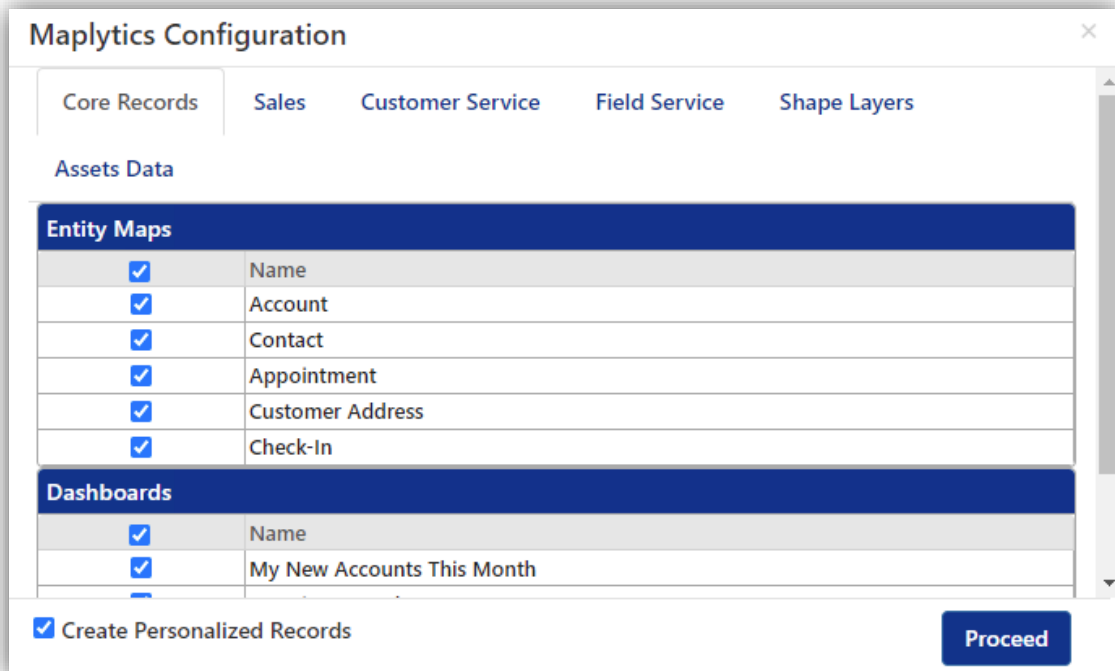
### Configure

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



The image shows the Maplytics License Registration window. At the top is the Maplytics logo. Below it are two buttons: 'ACTIVATE' (checked) and 'SEND REQUEST'. A section titled 'License Registration' contains several links: 'CRM Details', 'Add-On Apps', 'Notification', 'License Registration using (\*.lic) file', 'Configure' (highlighted with a red box), and 'Notes'. The 'CRM Details' section includes fields for 'CRM URL', 'CRM Version' (9.2), 'Organization', and 'User License'. Below these is a 'Configure' button and a 'Bing Maps Key' field with an 'Update' button.

- 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 image shows the Maplytics Configuration window. It has a title bar 'Maplytics Configuration' and a close button. Below the title bar are five tabs: 'Core Records', 'Sales', 'Customer Service', 'Field Service', and 'Shape Layers'. The 'Core Records' tab is selected. Under this tab, there is a section 'Assets Data' which contains two tables. The first table is 'Entity Maps' and the second is 'Dashboards'. Both tables have a checkbox in the first column and a text field in the second column. At the bottom of the window, there is a checkbox 'Create Personalized Records' (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

## Maplytics™ - License Registration

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.*

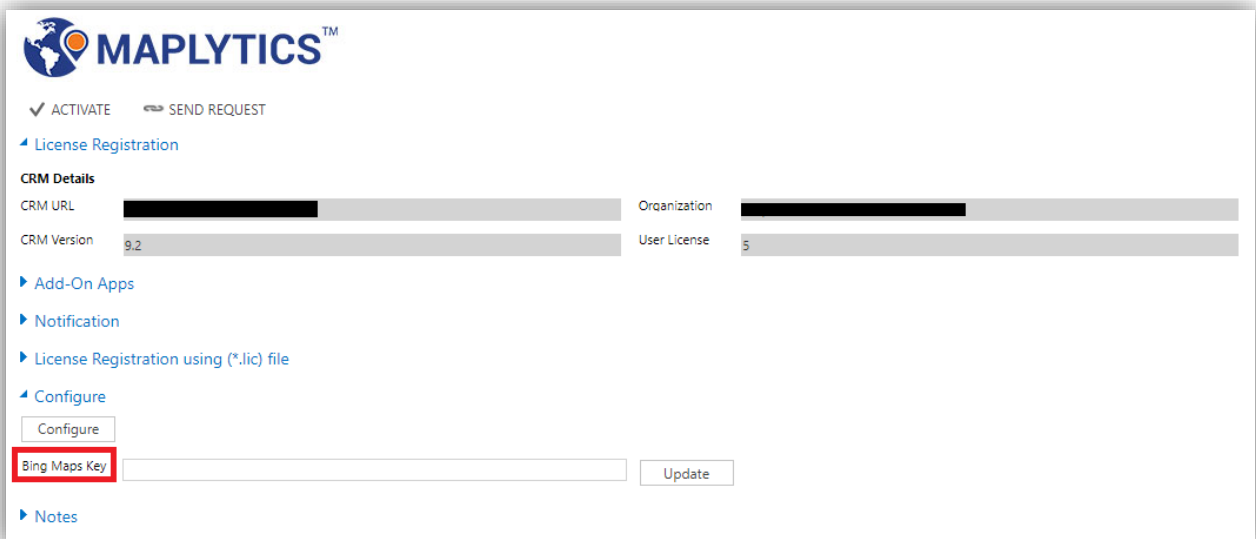
### Use Own Bing Maps Key

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™ user interface for License Registration. At the top, there's a navigation bar with 'ACTIVATE' and 'SEND REQUEST' buttons. Below it, a sidebar menu lists various settings: 'License Registration', 'CRM Details', 'Add-On Apps', 'Notification', 'License Registration using (\*.lic) file', 'Configure', and 'Notes'. The 'Configure' section is expanded, showing a 'Configure' button and a 'Bing Maps Key' input field, which is highlighted with a red rectangle. An 'Update' button is located to the right of the input field. The main content area displays 'CRM Details' with fields for 'CRM URL', 'CRM Version' (9.2), 'Organization', and 'User License' (5).



## Contact Us

**M/S. INOGIC TECH (INDIA) PVT. LTD.**

A-301 Everest Nivara Infotech Park,  
MIDC, Turbhe,  
Navi Mumbai - 400 705 - INDIA

E-mail: [crm@inogic.com](mailto:crm@inogic.com)

Twitter: [@Maplytics](#); [@Inogic](#)

Facebook: [@Maplytics](#); [@Inogic](#)

Website: <http://www.maplytics.com/> ; <http://www.inogic.com/>

Online Help File: <https://docs.maplytics.com/>