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MAPLYTICS[™] – User Manual

maplytics.



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Introduction

Maplytics[™] is a leading Certified for Microsoft Dynamics 365 (CfMD) geo-analytical mapping app. Maplytics empowers users across verticals with the power of Geographical Data Visualization, Optimized Routing, Automated Appointment Planning, Proximity Search, Heat Maps, Shape Overlay, Census data visualization and Territory Management to drive better sales, improve business processes and engage right customers at the right time.

Maplytics is available for Microsoft Dynamics versions CRM 2013 and above and supports all deployment models of CRM On-Premise (IFD as well), CRM Online and Partner-hosted. It uses the API services provided by Bing maps. The following are the highlights of Maplytics:

- ✓ Ease of access
- ✓ Compatible with Dynamics 365 App for Phones and Tablets
- ✓ Multiple language support
- ✓ Plot multiple OOB & custom entities on map
- ✓ Hierarchal Territories
- ✓ Area of Service
- ✓ Search nearby records with Proximity Search
- ✓ Auto Scheduling for multiple users
- ✓ Track field reps' activities with Check-In
- ✓ Custom icons for pushpins
- ✓ Multiple categories on plot card
- ✓ PowerApps Component Framework
- ✓ Multiple categorizations for single entity
- ✓ Multiple territories for a record
- ✓ Spider Cluster
- ✓ Building Marketing list
- ✓ Pie Charts and Column Charts in Heat Map
- ✓ Overlay
- ✓ Merged Plot and Route view
- ✓ Maplytics Security Template
- ✓ Point of Interest search
- ✓ Layer Menu
- ✓ Concentric Proximity search
- ✓ Land Area Mapping
- ✓ CRM / Dynamics 365 Customer Engagement

- ✓ Bulk geographies upload
- ✓ Shape operations
- ✓ Territory Management
- ✓ Auto-Territory Creation
- ✓ Real-Time Tracking
- ✓ Maplytics API
- ✓ Territory Assignment Rules
- ✓ Draft Territories
- ✓ Census data visualization
- ✓ Support for CDS
- ✓ Data grid resizable
- ✓ Plot Saved Templates on individual records
- ✓ Configurable color-coded pushpins
- ✓ Routing with multiple waypoints
- ✓ Along the Route search
- ✓ Ability to Save & Share Driving directions
- ✓ Sales analysis with Heat Maps
- ✓ Summary Card on Detail and Heat Map
- ✓ Configurable color for Heat Map measure
- ✓ Maplytics Dashboards with configurable queries
- ✓ Geocoding Confidence Rating
- ✓ Turn-by-turn navigation on mobiles & tablets
- ✓ Seamlessly integrated within Dynamics
- ✓ Multi-search layer in Detail map Control

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Language Support

Maplytics is a multi-language solution currently available in eleven different languages namely:

- English
- Spanish (Español)
- German (Deutsche)
- French (Français)
- Portuguese (Português)
- Turkish (Türk)
- Arabic (عربی)
- Hungarian (Magyar)
- Dutch (Nederlands)
- Polish (Polski)
- Russian (Русский)

Maplytics auto-detects the user language set in Dynamics CRM and sets its language accordingly.

To check user language set in Dynamics CRM, please go to Settings > Options > Languages

Maplytics Configuration (Personalization)

			5 1		t Dynamics 303,		nage you	a email template
General	Synchronization	Activities	Formats	Email Templates	Email Signatures	Email	Privacy	Languages
Select th	e language you pre	fer to see Mi	crosoft Dyn	amics 365 displayed	lin			
You can	change the display la	nguage used	for items suc	th as menus and dial	og boxes.	_		
Base Lan	guage	Englis	h					
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Care inte								

Each user of Maplytics can customize Maplytics configuration according to their preference. The user can configure Zoom level, Current Location, default origin and destination and a couple of other settings like Map more, default summary grouping, etc. Please go to *Settings > Maplytics Configuration Details >* Select Maplytics Configuration record for the required user (users added in Team Maplytics)> Set according to the preference

Refer to *'Maplytics Configuration Details (Personalization)'* section of *Installation Manual* for a detailed description of personalization settings.

Maplytics Security Template

System admin and Maplytics admin can provide selective access of Maplytics actions to the Maplytics users. They can select the required Mass actions & other actions in the list and save it as a Security template. They can further assign this template to the required users so as to provide the access of the selected actions in the template to the respective Maplytics users.

To create a Security Template,

Go to the Maplytics App > Settings > Maplytics Security Templates > New > 'General' tab > Give a name and 'save' the template.





To assign a template to the Maplytics users, Admins can add the Maplytics Configuration Detail records of the Maplytics users under the section of 'Maplytics Configuration Details', to whom the template has to be assigned.

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	[0]	Run Report	>
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+	New Map Configuration Details	Change View
	Add	Cancel

In order to assign the Security Template to multiple users at once. Admins can also add teams/users using the button 'Manage users' from the Ribbon bar. They can also remove the required users/teams from the list. Thus, using 'Manage users' admins can easily manage the users assigned with any Security Template.

	Dynamics 365	\sim	Maplytics Settings > Maplytics Security Templates > Sales
=			🔚 Save 📓 Save & Close 🕂 New 🗋 Deactivate 🗐 Delete 🔍 Manage Users
6	Home		Sales
Ŀ	Recent	\sim	Maplytics Security Templates
\$2	Pinned	\sim	General Action Configuration Related

Admins can choose whether they want to assign the template to Users or Teams by adding them. They can also choose to remove the users/teams from the list. They can also see the list of teams and respective users added from those teams.

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Note: A Maplytics Security template can be assigned to the users belonging to any team, however, they should also exist into the Maplytics team.



Go to Action Configuration > Select the required actions to be made available to the users assigned with this template and save.



eral Action Config	uration Related		
ctions			
Select All Actions	D		
Save Template - Public			
Create Route	۵	Save Template - Personal	
Print Map	۵	Update Route	2
Create New Record	0	Download Map	2
Related Records	۵	Send Route Email	2
Territory Management	0	Overlay Layer	
Shape Files Configuration	D	Check - In	
Travel Distance		Truck Route	

Along with using the 'Remove' button, to unassign any template to a user, admins can also **Go to Maplytics App > Settings > Maplytics Configuration Details > Select the record of the required user> Remove the lookup value for the field of 'Maplytics Security Templates'**

1aplytics ap Configuration Details				
eneral Auto Schedulin	g Related			
Route Option	Shortest Time	Navigate In	Google	
▲ Map Center		Records Per Page In Grid	50	
Heat Map Type	Boundary	Zoom Level		
Summary Grouping	City	∆ User	© ႙	
Default Template		Maplytics Security Template	â Sales	
Set As Origin	Other	Set As Destination	Other	
Other - Set As Origin	819 Catalpa Dr, Montgomery, AL 36112	Other - Set As Destination	819 Catalpa Dr, M	ontgomery, AL 3611

Note:

- All the actions will be visible to a user, if no template is assigned to the user
- Only System Admin and Maplytics Admin will be able to access the Maplytics Security Template Entity

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Individual Record Map

A tab to display an Individual Map section has been added by default on the Account, Contact and Lead records as a part of the Maplytics solution.

Enterprises Inc Account	- Saved		£2,013,833.00 1,555 Ada L Annual Revenue No. of Employees Owner
immary Route Map	Project Price Lists	Details Servicing Related	
No Auto Geocoding		Address Relations Ocala Wildlife Management Area	and the second
Street 1	2060 S Bay St	2060 S Bay St FL Eustis LAKE FL 32726 Q Lat 28 8344 Long -81	.6858 R
Street 2	FL		DeLand New Smy
Street 3			Lake Helen Drange City
City	Eustis	indo	Teltona
State/Province	FL	inverness	Lake Monroe
ZIP/Postal Code	32726	Inverness Inlands South Lake Hamis	(ar) Sanford
Country/Region		Floral City	ekiwa Springs Winter
Latitude	28.83442	Apopla	Altamonte Springs Oviedo
Longitude	-81.68579	Lake Apopka Mascotte Mineeda	Winter Park University
Territory		ville Groveland Clermont Garden 468	Orlando 5 Miles 10 km

Here, two types of pushpins are plotted on the map:

Orange color pushpin: This always indicates the record location on the map. This pushpin is movable on the map. If the user is not satisfied with the automatic geocoding information stored for the record, they can click on the pushpin and drag it around to the required location on the map. As the user moves the pushpin, the geocoding information (*Latitude* and *Longitude*) and the

address is updated in the bar at the top. Use the Update button to save the updated geocoding information. It will ask the user whether they would like to update only the Latitude & Longitude values or the address as well. They can select the required option. This will help the user to geocode the address as per the requirement.

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Confirm	×
Would you like to save also the address?	
253 Martin Ave South Lake Tahoe, El Dorado County California, 96150 United States	
Yes, save also the address No, sav	ve Lat Long only

Set the 'No Auto Geocoding' option to 'Yes' available on the left-hand side, if the user has manually set the geocoding information and do not want the automation to override the geocoding information. Right Clicking on the Map gives an option of Street View.



Selecting it would get the User a 3D View.





 Address: If users wants to modify the geocoding for any record, they can click in the Address text box.



After that, they can click on 'Update' button to update the address and Latitude & Longitude values. It will ask the user whether they would like to update only the Latitude & Longitude values or the address as well. They can select the required option. Apart from this, users can also click



on the orange pushpin, drag it around to the required location, and then click on update to update the address and/or Latitude Longitude values.



Note: Users can be restricted to update the address and Latitude & Longitude values by assigning them a security template where 'Allow Push Pin Update' is not selected. Please refer to the Maplytics Security template in this User manual to know more about the same.

• **Related Records:** User can use 'Relations' drop-down to select the available relationships for this Entity. Related records correspond to all 1:N relationship between the plotted Entity. The user can further see related record information by clicking or hovering on it. The required attributes like Email Address, Phone Number etc. can be selected within the entity map to be seen on hover or click. At a maximum, user can view 5 relationships at once. Default relationships can also be selected that will be plotted by default whenever this map is loaded. At a maximum, user can select five Default relationships. User can also select the color and pushpin icons for the related records. Check the Entity Map settings (refer to Installation Manual) to set Default relationship, colors & pushpins and adding more relationships to '*Relations*' dropdown. In the image below, two relationships (Account-Contact and Account-Lead) are plotted for the account "Adventure Works".



Steps to add the Map to other entity forms

Open the Entity form and go to the 'Insert' tab.

Click on 'Web Resource' button, as shown in the screenshot.

FILE		σ						Microso	ft Dynamics CRM	_
Section	Three Three Columns	Two Columns	Two Columns	Two Columns	One Column	Sub-Grid	Spacer	Quick View Form	Web Resource	Bing Navigation Link
	3 Tabs		2 Tabs		1 Tab				Control	
✓ Oppe	ortunity mary			Solutio	n: Default Opport	Solution unity			Web Resource Add an existing V form.	Veb resource to this
- Prod Quo	luct Line Items tes		Sumi Oppor	nary tunity Infe	ormation	NOTE	S PANE		You can also defi resource will be r on the form.	ne how the Web amed and formatted



General For	matting Dependencies
Web resource	e e * 📓 iki_/Maplytics/Maplytics.IndividualMap.html 🛛 🗔
Field Name a	and Properties
Name *	WebResource_ Map
Label *	Map
Display la	abel on the Form
Visibility Visible by	y default
Web Resource	ce Properties
Custom Para	meter(data)
C Re	estrict cross-frame scripting, where supported.
Pa	iss record object-type code and unique identifier as parameters.

In the Add Web Resource dialog, select *"ikl_/Maplytics/Maplytics.IndividualMap.html"* web resource and check the Pass record object-type checkbox as shown in the screenshot. The recommended number of rows in formatting is minimum 10.

Click *OK*, then *Save and publish* the form to see the Map on the entity form.

Note: To plot a particular address on the Map, it should be geocoded and the Latitude & Longitude should be set for that address. For geocoding you need to execute Maplytics Geocoding workflow for the records.

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Area of Service

The user can view the data in a proximity or a region around an individual record as defined by the user in the Area of service.

E. STEVE ZERVOUDIS & SON Account	S - Saved \$290,000.00 37 Annual Revenue Number of Employees Owner
mary Area of service Route on rec	rd Template on record Detail map Edit map control …
Contextual Search Search Option Proximity ~	Roselle Elizabeth Bayonne O Search record
Proximity	Rahway SEAGATE
Accour - 5 ~	Lower New York Bay2 miles 2 km

Add Area of Service tab

To add Area of Service tab, Open the Entity form and go to the 'Insert' tab. Click on Web Resource button, as shown in the screenshot.

FILE	HOME	INSER	T							
	hon	hran	hm	h	hn		-			🖨 Web Resourc
									K-	FRAME
Section	Three Columns	Three Columns	Two Columns	Two Columns	Two Columns	One Column	Sub-Grid	Spacer	Quick View Form	2 Timeline
	3 Ta	bs		2 Tabs		1 Tab				

In the Add Web Resource dialog, select *"ikl_/Maplytics/Maplytics.AutoSearchFilters. html"* web resource and check the 'Pass record object-type' checkbox.

The recommended number of rows in formatting is minimum 10.

Click *OK*, then *Save and publish* the form to see the Map on the entity form.

Add Web Resource Add an existing web resource to the Form.	?	×
General Formatting Dependencies Web resource Web resource Web resource		•
Field Name and Properties Name WebResource_ Area of service Label Area of service Display label on the Form		
✓ Visibility		
Web Resource Properties		ļ
Pass record object-type code and unique identifier as parameters.	ancel	-

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Create an Area of Service field

To save the values entered in the Area of Service, the user needs to create a field for the Entity for which Area of Service has been added. **Go to Entity form > New field**. Enter the following values: Name - Area of Service Data type – Multiple Line of Text Maximum Length – 10000 Select the field in the respective Entity map for the Area of Service field.

entity MAP account			
General Attribute Ma	ppings Tooltip Mapping Category Configuration	Configuration Advance Settings Related	_
Title *	Account Name	Area of Service Area of Service	
Template		ß	

The values when entered and saved into the Area of Service, the corresponding data will be plotted on the map.

View Area of Service data on a map

To view the Area of Service data on the map, there are two ways:

- Using Map button the results are shown in a map opened in a different tab
- Adding Detail map on form the results are shown in a map added on the same record

Using Map button

The user can open the Detail map to view the corresponding Area of Service data plotted on the map.





Adding Detail map on form

To add a Detail map to show the data of Area of Service, follow the steps mentioned below: Open the Entity form and go to the 'Insert' tab. Add two columns.

After adding Area of Service tab in the entity form as mentioned above, follow the steps mentioned below to add the Detail map on the entity form.

To add a detail map, Click on 'Web Resource' button. In the Add Web Resource dialog, select "*ikl_/Maplytics/Maplytics.DetailMap.html*"

web resource, add "form" as custom parameter (data) and check the 'Pass record object-type' checkbox as shown in the screenshot. The recommended number of rows in formatting is minimum 10.

Click *OK*, then *Save and publish* the form to see the Map on the Entity form.

Enter the required values into Area of Service, save it and click on the refresh button on the Detail map to view the data plotted.

tion Three Three Columns Columns Columns Columns	Two Dlumns Column
3 Tabs 2	Tabs
Veb Resource Properties addify this Web resource's properties.	? X
General Formatting Dependencies Web resource Web resource *	Aap.html
Field Name and Properties Name * WebResource_DetailMap Label * Detail Map	
Display label on the Form	
Visibility Visible by default Enable for mobile	
Web Resource Properties	
Restrict cross-frame scripting, where supported. Pass record object-type code and unique identifier as parameter	n.





Advanced Area Of Service

The advanced feature of Area Of Service enables users to determine an area in which services are being offered. It also helps in visualizing the records that lie in that area.

In the case of a Doctor, the Area Of Service helps in determining the region in which the doctor is operating or offering his services. Patient records falling under this service region can also be visualized. Similarly, from a Patient's POV, he can visualize all the doctors that offer services or whose services fall in his area. This helps the patient in selecting the nearest available doctor and the doctor can check the patients falling in his area of work.

Attribute Mapping of Service Area

Before we start using the advanced features of Area Of Service, the user needs to check the configuration as mentioned at the beginning of the feature.

Once the relationship is created, select the same in the respective Entity map. As per our example, the Maplytics admin or system admin needs to *go to Maplytics App > Settings (Left bottom) > Entity Maps > Accounts Entity map > Attributes Mapping > Geography relationship > Select the 1: N relationship of Geography and Account for Service Area Mapping*

	Dynamics 365	Mapl	ytics									Q	Q	+	7	٢	?	Ģ	U
=		÷	- 🗄 🖬 Save	Save & Close + New	🗋 Deactivate	Delete	🌐 Get G	eocode Count	C Refres	h Entity Map	🖔 Refresh	Q	Check A	lccess	8		🖻 Shar	e 🗸	Ģ
ଲ	Home		account - Saved																
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100	Maplytics Dashboard																		
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			Entity image	Detault Image				Service Area M	lapping	Account - G	ieography								
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To restrict access to creating and assigning of Service Area and saving Template as Service Of Area, the user can move to Settings>> Maplytics Security Templates>> Action Configuration

The user can then uncheck Service Area and Save Template- Service Area options to restrict the feature and the Template enabling them again, when required.

=	← □ 🖬 Save 🛱 Sa	we & Close + New 🏼 How 🗸		
Ġ Home	New Maplytics Secur	ity Templates		
🕒 Recent 🗸 🗸	General Action Configu	ration		
🖈 Pinned 🗸 🗸				
Maplytics	Create New Record		Download Map	0
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at Assets	Show Proximity Circle	0	Save Template - Service Area	
ትች Teams	Q	0		
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S Settings				

Working of Area Of Service

Users can create Service Area in an Individual Detail Map by using 6 ways-

by File, by Proximity, by Region, by Drawing, by Territory & By Overlay. Let us consider by Proximity.

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Å	Plot Records		×	
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Canal Canal		Gold Mountain	Bre Port East F	Orci
Micro	soft Bing	6		

After creating the shape, user can select the shape using align tool & right click over it to select Area of Service option to assign Service Area for individual record.



Once the area is assigned, the map can be refreshed to see the assigned Service Area for individual record.

Using Area of Service template, user can see the records that lie within the created Service Area. For example, doctors can see patients' records which are falling under their service region.

There are two ways to save the Area of Service template,

1. Using the Area of Service tab, which is configured by user,

Account	WORKS - Saved			\$450,000,000.00 Annual Revenue	5,800 No. of Employees	John jonno Owner
Immary Area of Se	rvice Map De	tails Related \vee				
ocaren opion					1 40 -	
Proximity		~	2 A A	1. 1. 100.		
Proximity				V . 168	35 - 201	
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	Miles	~	10-0	Atlantic	100	Pacific
			1 4 jun	Ocean AFRICA	245	Ocean
Select Datasource			50	OUTH AMERICA		
Select Datasource	Select View	•			AUS	IRALIA
Select Datasource	Select View				Ocean	

2. Using Plot cards either by location or by region on the individual map



Map	lytics - Detail Map			E ×
&	Cluster Map Select Region Type	Everett	12202	Wenatchee Na Road
02	City	- Mukilteo		C
御!	Bellevue	Sound A	Monroe Mount Baker Snogualmie	+
89	Please Enter State	Port Save	The Template	Θ
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	Contact Select Cate 🛩	SeaTac Des Moines Kent	9	W
	Overlay	Federal Way	ton	
	Save Template	Search Tacoma		
-	Shelton	University Place Bonney Lake		Roslyn 10 miles 20 km

Plotting a Shape Layer on the created Service Area. This can be done by clicking on the 'Show Region Boundary' on the right



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Detail Map

Maplytics buttons are added to the Entity forms as well as the Entity Homepages so that it can be easily accessed from anywhere.

③ 🕂 New 🖁 Open Org Chart 🗋 Deactivate	$^{\rho_{3}}_{\rm N}$ Connect $\mid \smallsetminus $	+ Add to Marketing List	A, Assign	🖾 Email a	a Link 🛍 Delete	🕐 Refresh	😵 Map	
AH ACCOUNT A. HANSA PERSAUD & SONS		Annual Reve \$366,466.0	nue O		No. of Employ	/ees		\sim
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ACCOUNT INFORMATION	Timeline		+		Primary Conta	ct		
Account Name *	Enter a note			Ŵ				
A. HANSA PERSAUD & SONS					CONTACTS			

Using this button, the user can invoke the Maplytics application for detailed geographical analysis. Maplytics provides both 'Heat Maps' view as well as 'Detail Map' view of the Dynamics CRM data. These views can be easily accessed from the buttons added to the command bar in entity home pages and other views.

🛱 Show Chart 🕂 New 🛍 Delete 🗸	🕐 Refresh 🛛 🕏 Detail Map 🔹 He	eat Map 🛛 Email a Link 🛛 🗸 💅 Flo	w 🗸 💷 Run Report 🗸 \cdots
My Active Accounts	~		Search for records $~~ {\cal P}$
✓ Account Name	↑ \heartsuit Main Phone ↑	□ □ □ □ □ □ □ □ □ □ □ □	ntact 1 ∇ Email (Primary Contact) \downarrow ∇
0969 Ocean View Road	(415) 555-9933	Jersey	
10003 Account	4578755	Adrian Dum	itrascu Adrian@adventure-works.com
A Damc		Alberta	
A. Datum			

Selecting a few records and clicking on the 'Detail Map' button on a particular Entity Grid view will open the following window;



It will automatically plot the selected records from the view on the map. *Records that do not have their latitude/ longitude will be ignored and will not be plotted on the Map.*

Street View

Right Clicking on the Detail Map gives an option of Street View.



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Clicking it opens an improved 3D view of the street.

Right Clicking on the Detail Map on the Mobile App also gives an option of Street View and a 3D View.





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Plot

There are five different search options to plot the data on Map:

- By Location
- By Region
- By Drawing
- By Shapefile
- By Territory
- By Template

Note: The user can also configure the 'Search Options' to be visible on the map. Refer 'Setup Entity Map' section of Installation Manual for further instruction.

By Location

This helps the user to plot the data using the geocoding of each record. By Location search option also allows the user to perform Proximity/Radius Search based on Distance or Time.

The Current Location is fetched from the user's personalization record. The user can also set a new current location using the contextual menu. Refer to the section of the Contextual menu.



Plot Records $\mathbf{2}$ 8 🗶 🗮 日 Filter Cluster Map Current Location 9 Amy Ct, Staten Island, NY 103 Proximity Distance ○ Time Miles □ Show Travel Distance Datasource Select Datasource Accour 🗙 Select Viev 🖌 🌾 +Select Category Account Select ... 🗸 Overlav 📕 Save Tem **ر** s

Select Datasource dropdown will list out all the Entities (OOB and Custom) configured for Maplytics and the active views (System views, Personal views, Maplytics Dashboards and Marketing Lists) that are available for the selected Entity type. The user can choose one of the views to plot all the records available in that view.

Note: The user can also configure the 'Views List'. Refer 'Setup Entity Map' section of Installation Manual for further instruction.





The user can select multiple entities using the '+' button. This allows for viewing Dynamics CRM data across Entities in a single view on the map.

After selecting multiple entities, the user can click on the 'Search' button to plot the records for the selected entities. This helps the user to visualize three entities on a single map.

Note: User can define the colors as well as pushpin shapes of the Entity – view combination. Refer to 'Setup Entity Map' section of Installation Manual for further instructions.







By Region

This helps the user to plot the data by the region of records, i.e., City, State, County, Country, PostalCode, PostalCode Sector, Postal Code(Outward Code), Postal Code Areas. The user can plot multiple regions under a particular region type.

- **Postal Code**: The smallest postcode category, such as a zip code.
- **Postal Code Sector**: The second '1' is called "Postcode Sector". Example: CA1 1
- **Postal Code(Outward Code):** This is called Outward Code, the part of the postcode before the single space in the middle. Example: CA1
- **Postal Code Areas**: The next largest postcode category after Postcode1 that is created by aggregating Postcode1 areas.

Note:

- The regions that were plotted using the option of Post code Areas before will now be plotted by using the option of Post code sector.
- The regions will be plotted as per the Bing maps.

Plot Records

Cluster Map Select Region Type
Select Region
State County Country Postal Code Postal Code Sector Postal Code(Outward Code) Postal Code Area Account Select V
Overlay ~



By Drawing

This helps the user to plot data by defining their own shapes. The user can use the 'Drawing tool bar' to draw the following shapes:

- Freehand drawing
- n-sided polygon
- Circle
- Rectangle

The user can further edit the drawn shapes by using the following options in the Drawing tool bar:

- Edit
- Erase
- Fill color
- Stroke color



Note: While creating an n-sided polygon, use the 'Esc' key from keyboard to close the shape.


By File within By Drawing

Within the 'By Drawing' Option, there is a 'By File' Option available in the drop-down.



This helps the user to plot data by uploading .zip, .shp, .kml or. geojson file and filter records on the plotted shapes as per the uploaded file. Thus, the user can visualize records as per his requirement within a specific shape.



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By Territory

This helps the user to plot the data defined in a particular sales territory. The user can select multiple territories in 'Select Territory' option and respective Datasource & view to plot the territories along with the records assigned with them.





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By Template

This helps the user to plot the predefined search criteria in Detail Map. The user can save the search criteria as a template and use the 'By Template' search option to quickly plot the data with that search criteria. This helps the user to save a considerable amount of time.

Plot Records	\times
🚨 🔗 🗶 🇮 🕒	
Filter	^
Cluster Map Select Maplytics Template	
Australia- proximity Brisbane	~

The User can plot the required criteria on the map and use the button 'Save template' to save the search criteria as a template and define the access level of the Template while saving the template as described below:

- **Personal** The users can limit the usage of this template to themselves
- **Public** Anyone in the organization can use this template

Apart from saving information of Plot Records, Category card, and filters from Grid, it also saves the Zoom level & Center of the map.

For example, if any user is assigned with a task where
the requirement is to regularly plot 'My Active Accounts'
records in 2 miles of a particular location and filter a
particular Industry, then the By Template option can be
beneficial.

•
🔎 Search

Save The Template	×
Add to existing template	
Create new template	
Golf Course - 2 Miles	
Access Level :	
Personal	•
	Save

Note:

- Please assign 'Maplytics User' security role to Team Maplytics before exploring this functionality.
- If user saves a template with Proximity search and current location as blank, while plotting the template, the current GPS location of the logged-in user will be fetched and the results to the Proximity search will be plotted around the user's current GPS location.



Default Template

User can set the Default Template within their respective Configuration Detail record and view the predefined search criteria saved in the template plotted by default on the Detail Map.

To set a template as Default, user need to *Go to the Maplytics App > Settings > Maplytics Configuration Details > Respective User Configuration Detail record > General > Default Template > Select required template.*

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≡	🔶 📃 🖼 Save 🖓 Save & Close 🕐 Refresh 🔍 Check Access 🖾 Email a L	ink 🔊 Flow 🗸 🖷 W	ord Templates $$ 🔟 Run Report $$						
ŵ Home	Maplytics								
$^{\odot}$ Recent \checkmark	Map Configuration Details								
🖈 Pinned \checkmark	General Auto Scheduling Related								
Maplytics	Live Traffic No	Along The Route Distance	0.50	•					
Maplytics Dashboard	Current Location 9 Amy Ct, Staten Island, NY 10314	Records Per Page In Grid	200						
Maplytics Templates	Map Mode Road	Navigate In	Google						
Maplytics Configurat	Show Area on Card Yes	Zoom Level	12						
 Maplytics Security Te Territories 	Heat Map Type Boundary	🔒 Map Center	40.5824367,-74.1508567						
Assets	Default Template	Region Area Unit	Square Kilometer						
ተኛ Teams	Other - Set As Origin 10 Ellsworth Ave, New York, NY 10312	Summary Grouping	Postal Code						
 Notices Inogic License Details 	Set As Origin Other	Maplytics Security Template							
😵 License Registration		Set As Destination	Other						
		Other - Set As Destination	123 Harold St, Staten Island, NY 10314						
5 Settings	21 Active Status: Active			🗟 Save					

Note: Default Template will not open if,

- User selects a few records in Entity home grid and then clicks on Detail map button.
- User expands a dashboard to open on Detail map.
- User has saved Default template with search criteria other than Proximity Search and uses the 'Map' button on a specific record and opened the map

When clicked on the 'Detail Map' button, it will plot the default template selected in the respective user's Maplytics configuration detail record by default on the map.



Note: Default Template will not open if,

- User selects a few records in Entity home grid and then clicks on Detail map button.
- User expands a dashboard to open on Detail map.
- User has saved Default template with search criteria other than By location/ Proximity Search and uses the 'Map' button on a specific record to open the map. In this case, the respective record will be plotted on map.
- User has set Area of Service on a record and is using the 'Map button' on the record to open the map.

Note: Below are some exceptional cases for Default template where the plotted data might vary.

- If Default template has been saved with search criteria By Location and the user uses the 'Map' button on a record to open the Map, in this case, the respective record will be plotted as the current location along with other records selected within the Default template.
- If Default template has been saved with search criteria Proximity Search and the user uses the 'Map' button on a record to open the Map, in this case, the respective record will be plotted as the current location replacing the initial current location set in the template. Thus, the records will be plotted within the specified radius from the respective record's location which is now the current location on the map.

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Search Record

Once the records have been plotted, a search bar appears at top center of the map. This search bar can then be used to search any specific record from among the plotted ones using the primary attribute.



As in the above example, the Industry of 'Engineering' displayed for the search entity appearing in the bar above is derived from the second column of the Quick Find View.

This search zooms the map to the area where the required record is plotted. The preferred pushpin blinks in quick succession to highlight its position from among the records.





Finding a particular record from among many becomes easy with this feature.



Cluster map

The user can select this option to group the closely positioned pushpins into a cluster. A cluster shows the number of pushpins in the cluster. The user can zoom in further to break down the cluster into smaller clusters or zoom out to group closely positioned clusters into one.



Cluster Area

The user can hover on any cluster to see the 'Cluster area' which shows the data spread. The data spread is based on the area covered by the pushpins existing in the cluster.

Image: Second	X Westfi	eld Eliza	beth O	Bayonne	Upper New Yorl Bay	PARK SLOPE	HOWARD BEA	CH CH
Account: Active Accounts: 50	eld South Plainfield Iscataway ReADO SECTION ReADO SECTION Lew Brunswick Brunswick Surreville	Rahwa Martin N Constant Rues		2 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	ver New Y	SEAGATE	AN BEACH Proved Bennett Fried	(+) (-) (-) (-) (-) (-) (-) (-) (-
Account Name 🔺	T Main Phone	▼ Address 1: City	T	Primary Contact	T E	imail 🔻 🔻	Full Name	T
Concalves & Sons	2128402600	Staten Island						*
📑 🗹 Dejohn & Sons	2128409565	Staten Island						-
J. N J KATZ & ASSOC. INC. 8	¥ 14141242839	Staten Island						-
	items per page						(50 Selected) 1	- 50 of 50 items

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Spider cluster

The user can click on any cluster to view the pushpins existing in the same in the form of a 'Spider cluster'.



Note: Spider clusters can be visualized only for records less than or equal to 50.



Category

Users can choose any attribute for the selected entity to categorize the data on the map and visualize the pushpins color-coded based on the selected attribute. The category card will further help the user to differentiate between the pushpins.

Multiple categories for multiple entitles

User can plot a maximum of three entities on the map and can also select one attribute for each of the three datasources selected to categorize them. The screenshot below shows the categorization of the records of Account, Lead and Opportunity based on the attributes Annual revenue, Rating and Estimated Revenue respectively.

Note:

- User can choose respective categories for at a maximum of three different entities.
- The user can define the color as well as shape of pushpins for each parameters of category. Refer to <u>Pre-Define Colors for Category section</u> for further details.
- User can also choose the field attributes to be visible in Category list. Refer to 'Setup Entity Map' section of Installation Manual for further instruction.



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Multiple categories for single entity

Users can also plot a single entity records categorized by multiple attributes e.g. Account records categorized by Open revenue, Originating lead, Owner. The user can choose an entity twice or thrice with two or three different views respectively and choose required attributes for the respective views to categorize the same entity with different attributes. User can select a maximum of three attributes to categorize a single entity.

Note: User can select a maximum of three attributes to categorize a single entity.

While plotting a single entity categorized by three attributes, three category cards will open up for the three attributes. For example, the screenshot below shows Accounts plotted on the map which is categorized by three different attributes viz. Annual Revenue, Industry and Owner and three different cards have opened up for each of them.

Plot Records X							
2 2 × 10 Filter ^							
Cluster Map Current Location 9 Amy Ct, Staten Island, NY 103							
Proximity Distance Miles							
Show Travel Distance DataSource own							
Select Datas Annual Revenue Accour Accour Conner Select Cated Ownership							
Account Annual V							
Save Template Search							



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The category cards shown above states which category is represented by which pushpin. The categories are represented with the following three different parts of every single pushpin, $\mathfrak{A}, \mathfrak{O}, \mathfrak{O}$

All the above three icons combine to form a pushpin which will represent the plotted records. Each of the three parts represent three different categories with different colors shown within the category card. For example, the category card 'Account – Annual revenue' shows that the form represents the Account records that belong to different ranges of Annual revenue with different colors. The category card 'Account-industry' shows that for represents the Account records that belong to different colors and the category card 'Account records that belong the icon represents the Account records that belong to different colors. The the icon represents the Account records that belong the icon represents the Account records that belong to different colors.

the icon represents the Account records that belong to different owners with different colors. In case, the user has selected only two attributes in order to categorize the entity records, the

In case, the user has selected only two attributes in order to categorize the entity records, the pushpin that will be used to represent two categories will be \bigcirc .

The plotting of categories follows **AND** condition. This means that if the user deselects a category in one category card, then all the pushpins for records that belonging to that category will be hidden from the map even if any of the records belong to any other categories as well. For instance, if the user deselects the category of Annual revenue between 5000-10000, then all the pushpins for the records that belong to this category will be hidden from the map even if any of these records belong to other category like owner or industry.





In the screenshot below, three categories have been selected viz. Annual Revenue, Industry and Owner.

In the screenshot below, only two categories have been selected viz. Annual Revenue and Industry.



Set colors and shapes for pushpins

The users have the ability to define colors and shape of the pushpins to visualise the records plotted on the map as per the requirement. This will help the user to differentiate between the records that belong to different views or categories.

Set pushpins from map

Users can select the pushpin of their choice with the desired color, right from the Detail Map while visualizing CRM records on the map.

Set pushpins for views

While plotting records using the Plot card, users can select the required colors and the shape of the pushpins for the records of the view within the Datasource section in the Plot Records card. Once the color or pushpin are selected, it will instantly reflect on the map.



Set pushpin for categories

While plotting CRM records along with categorization, user can select the color and shape of the pushpins and also save the selection for future use. Once the categorized data is plotted, user can go to the respective category card, change the color and shape of the pushpins and click on 'Save' to save the pushpins selected for future use.



2	Layer Menu				
Å	Account - Industry	×	27 Linden		BAY RIDGE BOROUGH PARK
<u>9</u>	Select All				
\↓ ()	Accounting	۲	vay a		Fort
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	Engineering	0	venel Carteret		West Brighton
	Insurance		Port Reading		SERVICE
	Social Services		Sewaren		
2	Transportation	•		Lower New York Bay	
	Plot Records	ds Dunlar	am Homes		
6 Bin	9	Garden	I Amboy		1 miles 1 km © 2021 TomTom, © 2021 Microsoft Corporation Terms

Configure pushpins in Entity map for new category

To set the colors and shape of the pushpins for the categories for any entity, the users have to follow the below steps:

• Go to Maplytics App > Settings > Entity Maps > select the entity map for required entity > Category configuration.

accoun Entity Map	t				
General	Attribute Mappings	Tooltip Mapping	Category Configuration	figuration Advanced Settings	
				+ New Entity Category	🖒 Refresh
~	Name ↑ ∨		Entity Map 🗸	Data Type 🗸	
	industrycode		account	picklist	
	revenue		account	money	

- Click on the plus '+ New Entity Category' in the subgrid to open the new Entity Category form. Select the name of the category attribute in the Category text box and save the form.
- The user can select only OptionSet, Two options, Numeric, String, Lookup and Money attributes to define category colors.
- Colors and shapes will be auto-populated, the user can further set their own preferences.

Category configuration for users

User can open a category from the Category Configuration tab by going to *Maplytics App > Settings > Entity Maps > select the entity map for required entity > Category configuration.* They can change the colors and shape of pushpins to view the same on the map using the following buttons. If user has saved some colors and pushpins for categories from the map then those saved selections will be shown here.

- Save 📛 : User can change the colors and pushpins and click on this button to save the selection
- Auto-Set : This button helps to set the colors and pushpins randomly
- Discard Changes 🗟 : If user has made any changes to the colors and pushpins, they can click on this button to discard the changes done
- Set to default \mathbf{O} : User can click on this to set the selection of the colors and pushpins to default which has been selected by Maplytics admin or System admin.

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Category configuration for admins

System Admin and Maplytics admin can also check the colors and pushpin selection in the entity map. Along with this, they will also have the ability to set the required colors and pushpins for all the Maplytics users as well. To do this, admins can *go to the Maplytics App > Settings > Entity Map > Respective Entity map > Category Configuration > Select required category.*

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Admins will be able to view two Option lists, one for themselves as a user and one for Default selection. The User Option list will work the same as explained above. The admin can further take some actions within the Default Option List using the following buttons.

- Apply to all 🗀 : Admins can select the required colors and pushpins and click on this button to save the selection for all Maplytics users
- Auto-Set : This button helps to set the colors and pushpins randomly
- Discard Changes 🗟 : If admin has made any changes to the colors and pushpins, they can click on this button to discard the changes done.

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Note:

- Selecting pushpins and saving the selection for categorized CRM data is only available for entities plotted with single category.
- The selection of pushpins saved will be available for the respective logged-in user only.
- If a category does not exist in the list of categories created in the respective entity map, then while saving the pushpin selection, the category will be created automatically for all the users.
- If a user has not selected any preference for pushpin colors and shapes for any category, the user will be shown the visualization of the pushpins on the map as per the selection saved by the Maplytics admin or the system admin in within the Default-Option list of the category in the respective entity map.

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Data Grid in Detail Map

The Data Grid is available at the bottom of the Detail map which can be opened using the yellow button 'View Data'. All plotted pushpins represent a unique record in Dynamics CRM and data grid helps the users to access these records from the map screen, filter the data further and perform some mass actions. Order of columns in the grid depends upon the Dynamics CRM View selected to plot the data and in the case of Marketing Lists & Maplytics Dashboard records, it is same as that of the Entity-View selected in Entity Map. The users can also customize the data columns to be visible in the grid by adding/removing columns from the Entity view.



Filter & Sort Data:

The user can use the filter present on the top of every column to filter the data further selecting any of the conditions and entering the respecting value.



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User can see the filter icon at the column header to understand based on which column the data has been filtered. Further, user can also click on any of the column header to sort the data and can see the arrow icon at the column header to understand based on which column the data has been sorted. User can deselect some of the records and see at the bottom the number of records selected from the list

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-	☑.	Adams & Sons	2122068501	Staten Island	763923	200	www.inogic13828.com	bruce10306@inogic.com
	□.	Addeo & Sons	2126618995	Staten Island	161278	200	www.inogic14272.com	robert10733@inogic.com
10	☑.	Aguayza & Sons	2123082665	Staten Island	378729	500	www.inogic13856.com	david10334@inogic.com
	☑.	Ahmad & Sons	2129205723	Staten Island	132192	500	www.inogic14483.com	william10937@inogic.com
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Reset:

This will reset the grid to the initial search.

Parent Record / Related Record:

This is useful when the user is dealing with plot related records functionality. The user can switch between child data and parent data using this button.

Resizable Data grid:

Double click on A Expand button to view the data grid in full screen. Double click on Collapse button to view the default size of the data grid. Use can also click once and drag to resize the data grid to the desired size.

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Highlight pushpins

User can click on any record within the Data Grid to highlight the respective pushpin on the map. User can also click on any pushpin on the map to highlight the respective record in the Data grid.



Mass Action Buttons

The user has the option to take actions on the plotted records like adding to route or executing the workflow on selected records in the grid. Defined mass actions are as follows:

- Add To Route: This option will add selected data points to the route. The user can add at max 25 data points to the route
- Save Data: The selected records can be saved as static Marketing List or Personal View in Dynamics CRM
- Change Owner: The user can assign the owner of the plotted records by selecting a user or a Team
- Manage Territory: The User can assign or change the territory of selected records
- Send Email: The user can send a mass email to the selected records. User can select any one the available email templates or a new email to write their own content. User can also choose to keep the recipient as To/Cc/Bcc in the email.

Send Email	>
Select Email Template.	
New Email	~
Select Email recipient	
То	~
	Proceed

<u>Select regarding</u>: If user needs to send bulk emails and also wants to keep a specific record in the Regarding field into the email. They can select the option of 'Select Regarding'. To view this option, they can follow the steps mentioned below.

• Open the respective record to be set in Regarding field from the 'Map' button on the record. In the screenshot below, we have taken an Account 'Gourmet to your door' as an instance.

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• Now plot the required records to whom the mail has to be sent and Go to Mass actions to choose the option of 'Send email'. Here, we have plotted Contacts.



• Once clicked on 'Send Email' from 'Mass Actions', user can select the option of 'Select Regarding' and the Account that we plotted earlier 'Gourmet to your door' will be set by Default within the Regarding field.

Send Email	>
Select Email Template.	
New Email	~
Select Email recipient	
То	~
Select Regarding	
Gourmet to your door	Q
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	Proceed

Note: This option will be visible only if the map has been opened using map button on a record.

- **Execute Workflow:** The user can execute any on-demand workflow with this functionality
- **Export To Excel:** The user can use this feature to export data from the map to excel. This functionality adhere to CRM security roles, if the user does not have the permission to 'Export Data to Excel' in CRM then that user will not be able to export data from Maplytics
- Create Activities: User can create activities for non-activity Entity records currently selected in "View Data grid." The user can define the Activity, Subject, Schedule Start date and Schedule end Time, Duration, Owner(User/Team) and Priority. The activities selected in respective Entity maps can be seen in the list of activities available to creare using the button of "Create activities". By clicking this button below window will open and the activities will be created based on the inputs given in the window by the user.

For example: If a user selects the appointment as the activities to be created for 20 records plotted on the map. Now if they select the Schedule start date to be let's say 1st August 2022 at 10 am and schedule end time to be 5 pm along with the duration as 1 hour. So the appointments will start getting created for record 1 at 10 am for 1 hour and record 2 at 11 am for 1 hours and so on till the appointment for record 7 is created for 1 hour till 5 pm. Here it meets the schedule end time i.e. 5 pm. Now for the rest of the records will be handled in the follwing days. So the appointments for the next 7 records will get created for the next day i.e. 2nd August starting from 10 am, each for an hour till 5 pm. Likewise, the appointment for the rest of the 6 records will get created for the third day i.e. 3rd August 2022.

The user can also select the required owner or the record's owner for the appointments being created. If the user has selected 'Record's owner' in the space for owner, the appointments will be assigned with the owner of the respective record i.e. if Record 1 has user A as the owner, then the appointment for the Record 1 will be User A itself.

Create Activities		×
Select Activity *		-
Appointment		
Subject *		
Schedule Start Date *		
		
Schedule End Time *		
	Ŀ	
Duration *		
30 Minutes	~	
Owner		
Record's Owner		
Priority		
Select Priority		
	Create	

Associate Records: This helps the user to associate a record with the plotted record(s) on map.
 To do this, user needs to open the map using 'Map' button on the record they want to associate.
 In the below screenshot the Account record is being opened using the 'Map' button.

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S. LOUIS RAMUNNI & SONS	조킹 Email a Link				
Summary Kanban Board for Case Map Attach	Summary Kanban Board for Case Map Attach2Dynamics Map My Relationships Area of Service Map Assets and Locations B Click2Export				
	Timeline	+ 7 1 :	Check Access		
Phone 21710669683 &	Enter a note	Û	Map Check-In		

Once the map is opened, plot the required Entity & View to associate the Account. Now, click on 'Mass actions'. In the below screenshot, Contacts are plotted on the map using Proximity Search.



Within Mass Actions, click on 'Associate Records'to open the window. Here, the relationships between both of the entities, the records plotted and the record from which the map has been opened will be listed. User can select the relationship through which they want to associate the records . Here, the record from which the map was opened earlier has been selected by default. User can also select another record as per their requirement to associate with the plotted records.

Associate Reco	rds
Select Associate Relationship	
Contact (N) : (1) Account (contact_	customer_accour 🗸
Select Associate Record	
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Note: This option will be visible in Mass Actions only if the map has been opened using map button on a record.

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 Associate records with many-to-many relationship: 'Associate records' feature can also be used for many-to-many relationship. Users can associate multiple records of an entity with another related entity record. The related entity record can be an existing or new one.

For an instance, we have two entities Doctor and Patient with many-to-many relationship. Let's say, the user opens the record of 'Dr Danny' of the entity 'Doctor' and clicks on 'Map' button to plot the record on the map.

::: Dynamics 365	Maphytics ア の Q + マ ③	? (sr
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券 Dashboards		
Activities	Owner * A Sam Roy	
Customers	Address1	
Accounts	Address2	
A Contacts	Latitude 18.99117	
Sales	longitude 72.82208	
& Leads		
Opportunities		
🚯 Quotes		
Doctors		
Patients		
DoctorPatients		
S Sales	E2 Active	🔙 Save

Now in the map, user can choose entity Patient as Datasource to plot multiple patients on the map. In this case, the Active patients are plotted.



Now user can click on a record of Patient and select the option of 'Associate Records' from the Tooltip card to open the window. Here, select the relationship Patient N:N Doctor.

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Associate with Existing Record: This option can be selected in order to view the list of the Existing Records of the Middle Entity. Here select a record from the list and 'add' to associate the records of the Entities Doctor and Patient.



Note: Associate record for many-to-many relationship can only be performed through the tooltip card and cannot be performed from the Mass Actions.

• Auto Scheduling: This can be used to create a schedule for one or more users automatically. Refer to the section of Auto scheduling to know how Auto Scheduling works.

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Tooltip Card

User can click on any pushpin to open a tooltip card. This card will display the data like Address, Account name etc. along with the Image set for the record. These attributes and image can be configured within the Tooltip Mapping section of the Entity Map so as to show on the Tooltip card.

★ R. WALTER PRATHER	×			
→ DIRECTION → SET AS CU → SET	T AS P			
280,N → Set As Origin USA → Set As Destination → Add To Route	AND NY			
Full Name: R. WALTER PRATHER				
Email: some_26443@inogic.com				
Business Phone: 5183734439				
Take An Action				

User can also **click on the pushpin** of that contact to open the tooltip card to view the respective image on the card. User needs to select the 'Default Image' field in the field of 'Entity image' in Entity map to view the record image on hover and tooltip card. Please refer to the installation manual.



User can also set a particular record as 'Origin', 'Destination', 'Add to Route' under Direction, 'Set as Current Location' and 'POI location' from the Tooltip card.



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Moreover, the user can **hover on the image** appearing in tooltip card to zoom in the image.

Quick Call to Action Buttons

User can associate quick action buttons. This helps in saving time while switching between screens to take actions. First four actions are the default actions and cannot be changed by the user. User can further add actions for creating records for activities and related entities. The default records are as follows:

- Change Owner 😃 : Assign an owner to the respective record by selecting a user or a team
- **Open Record** Ċ: Open record directly from this screen to edit any field
- Plot Related Record
 ⁽⁴⁾: Plot One-to-Many Relationships/Related records of a particular record as shown below:



Select the required relationships from the list and click on 'Plot Records' button. Related records will be plotted as shown below. Use 'Parent Records' button to switch between Parent and Related records data points.

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 Run workflow 🛞 : The user can execute on-demand workflows on an individual record. When clicked on this button, it will open a window which will list down all the on-demand workflows available for respective Entity as shown below:

Execute Workflow	×
Select Workflow	
Inogic.Maplytics.AssignTerritoryWorkflow	•
Inogic.Maplytics.AssignTerritoryWorkflow	
Inogic.Maplytics.GeoCoding	EXELUIE

The user can customize the rest of the actions according to their requirement. For example, user can add Email, Add Task, Appointment and Quote and many more.

- Email 🔁: Send email to this record
- Add Task 📋 : Add task to this particular record
- **Appointment (**): Schedule appointment with this record
- **Quote** B: Create Quote related to the plotted entity record

The user can define these actions under 'Advance Settings' in Entity Maps. *Go to Setting > Entity Map > Select Required Record > Advance Settings > Tooltip Card Actions* or refer to 'Setup Entity Map' section of Installation Manual for further instructions.



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Hover

User can hover on Dynamics CRM Records plotted on the map to have a quick glance at its details and the record image. The user can have a maximum 6 different attributes here apart from the title attribute. Refer to the 'Setup Entity Map' section of Installation Manual for steps to configure attributes and image on hover.





Reset Map

User can use the button of 'Reset Map' to reload the map with the initial Detail map settings.



Note:

- This action will clear all the data plotted on map
- The refresh map button will show the same data on the map in the following conditions:
 - Expanding the map or plotting a route from a dashboard
 - Using the map button from an individual Entity record page
 - Plotting a route or a template
 - Plotting records by selecting the records from the Entity records page
 - User had set a default template for the Detail map

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Summary Card

The user can click on any enclosed area to get the summarized information of the plotted records in that area in a summary card. The area clicked will get highlighted and the respective data will be visible in the data grid. The user can customize the settings for this under the Summary card section in the respective 'Entity Maps'. Refer to 'Setup Entity Map' section of Installation Manual for further details.



With territories plotted on the map, Summary card also provides a button to 'Open Record' that can be used to open the respective territory from the map itself and 'Change Manager' to change the Territory Manager for the selected territory.

10314 X
Area: 39.17 Square Kilometer
Territory Name: 10314
Manager: Robert Butler
Take An Action
Total Records: 37
Account - (Accounts - Staten island): 37
Avg. Annual Revenue (Average):
\$295,405.41
Sales (Sum): \$12,080,090.00
Sum Annual Revenue (Sum):
\$10,930,000.00

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Layer Menu

This helps the user to select the required data among the multiple data plotted on the map. The user can use the toggle buttons on the Layer menu card to show or hide the required layers of the data to be shown on the map without removing the same from map.



Note: Layer menu card is collapsible but a user cannot close this card exclusively.

The layer menu card will show the following icons for the respective layers mentioned:

Layer type	lcon	Layer type	lcon
Data source		Territory	2
Route	♀ [°]	POI	
Proximity		Cluster Pushpin	500
Drawing Shape	4	Shape Operation	
Region Shape	*	Overlay- Shape file	*
Plot-child	8	Territory Management – Shape file	*

Note:

- Layer icon for Data source layer, POI layer and Plot-child layer will change depending upon pushpins visible on map
- If category is selected in the plot card, the layer menu card will show only the default pushpin for the Data source layer



Show/Hide Labels

User can click on the 'Show label' O button to view the labels for the pushpins, regions as well as territories plotted on the map. User can again click on 'Hide Label' O to hide the labels showing on the map. The option for showing/hiding labels is available for every individual layer of data plotted on the map.



Note: Show Labels is available for less than 5k records.

Show/Hide Territory List

With territories plotted on the map, layer menu will also show an option of Show/Hide List for the layer of territories. User can click on the show/hide list button option to open the list of territories plotted on the map.

☆	Territory List	
	Select All	Actions -
	AL, USA	
C	AR , USA	



User can select or deselect the territories which are required to be plotted on map. User can further change the name, select a color and select the manager for the respective territories and also save the same with the 'Save' button within the 'Territory List' card.

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Download map

Using the Download map button, the user can download the map as visible on the screen.

Note: Download map is not supported for Internet Explorer.

This helps the user to get the map download for using offline.





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If the user has plotted data with categorization, the map will be downloaded with a legend showing the categories.




Contextual Menu



(Latitude & Longitude).

Note: Create new record option will not available for existing record pushpin

User can right click on the map to open Contextual menu. It provides commonly used features in Dynamics CRM like creating a new record, set origin/destination or selecting map zoom level on the map, etc. The contextual menu provides the following options:

Create New Record:

User can right-click anywhere on the map or POI result icons and create a record for that particular location. This will save the record with the details of the address and the geo-coordinates

Create New Record	×
What would you like to create?	
	•
Account	
Contact	
Lead	

Directions:

- Set As Origin: This option will set the address of the pushpin/map location as the start location of the route.
- Set As Destination: This option will set the address of the pushpin/map location as the end location of the route.

<u>Add to Route</u>: This option will set the address of the pushpin/map location as a middle waypoint(s) of the selected route. For example, the user has selected Point A & B as orgin & destination respectively for a route and now clicks on the 'Add To Route' option, the Point B will remain as the destination and will become the Point C. The address of the selected pushpin will become the Point B of the route.

<u>Set as Current location</u>: User can click on any pushpin or anywhere on the map to set the address of the pushpin or the location as the current location respectively, which can be used for Proximity search.

Set as POI Location:

This option helps the user to set the location for the Point of Interest (POI) searches like ATMs, restaurants, Airports, etc. Setting the POI location, user can search for various Geo-tagged & Bing mapped locations around it.

Save Settings:

User can save the default settings for the following options. These settings will be saved in the Configuration details record of the user:

- Current location: This will save the location as the default current location.
- Map zoom level: This sets the zoom level and map center for the Map. After this setting is done, whenever the user will open the Detail Map, it will be zoomed down to the location set here.

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- Origin: This sets the location as the default origin.
- Destination: This sets the location as the default destination

Street View:

User can right click on map to get a Street view option. This will open a 3D view of the Map

Show Territory:

User can right click anywhere on the map or at any record to select the option 'Show Territory' from the Contextual menu. This will plot the respective territory to which the selected location or the record belongs to. Further, user can click on 'Hide territory' from Contextual Menu to hide the plotted territory.



User can also click on any pushpin to get a contextual menu. Along with the options mentioned above, this will provide the following options:

<u>Open record</u>: User can open the record form right from the map and can further edit the details for the record.

Actions: User can perform the following actions on the pushpin selected:

- Add Task: This option helps the user to create a new task in Dynamics CRM regarding the selected record.
- Schedule Appointment: The user can use this option to create a new appointment for the selected record.
- Manage Territory: The user can assign/re-assign a territory to the selected record from the map and hence can manage the territory.



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Multi-Address Plotting

If the entities in CRM contains more than one addresses, users can plot the records based on multiple addresses at once. This feature will enhance the visualization experience of those records that have presence in multiple cities or states etc. Admins can configure required addresses within the Entity map of the entity so as to view the option of selecting the addresses to plot the same on the map. Please refer to the Entity map section of the Installation manual to know how to configure multiple addresses in Maplytics to plot records based on multiple addresses.

While selecting the Datasource and View within the Plot records card, user can click on the 'Select address'

to select the addresses based on which they would like to plot the records. This will open the window that lists out all the addresses saved within the 'Address Attribute' Section of Entity map. User can select the required addresses and click on Search.

Note: The icon for 'Select Address' will only appear if multiple addresses are configured in the Attribute Mapping section of the respective entity map.

Select Address	×
Select Address	
1	
Billing address	
Shipping address	

The below screenshot shows the Accounts plotted based on the two addresses, Billing address and Shipping address. Here 4 records have been plotted and due to the two addresses of each of the records the map is showing 8 pushpins in total.

	Data	Show Travel Distance aSource lect Datasource ccour v Accounts v	Tongano: S Reno B	Basehor Kie tranger tolt Fencing Solutions	VerBank 3 Woodgrove Bank Bolt Fencing solutions Electro Power LLC	Bilue 291 To Bilue Springs	rt Osage
0	Ser.	count Select C 🗸	ins	De Soto Gourmet f	oods	ytown	
Ac	count	ts - Kansas (8) Account Name	Main Phone	Sunflower	Email	Status T	d Reco A Mass Acti
Ac	count	ts - Kansas (8) Account Name	Main Phone 9864627622	Sunflower	Email	CReset CReset	d Reco A Mass Acti Address Name Billing address
Ac	Ac count 2	ts - Kansas (8) Account Name Gourmet foods Gourmet foods	 Main Phone 9864627622 9864627622 	Sunflower 1 I H	the Data To the second	CReset	d Reco A Mass Acti Address Name Billing address Shipping address
Ac	Account	ts - Kansas (8) Account Name Gourmet foods Gourmet foods Electro Power LLC	 Main Phone 9864627622 9864627622 9865727212 	Sunflower 1 Y Address 1: City Y Shawnee Shawnee Kansas City	Email T Julie@gourmetfoods.com Brunn@Electropower.com	Creset Creset	d Reco A Mass Acti Address Name Billing address Shipping address Billing address
Ac	Account	ts - Kansas (8) Account Name Gourmet foods Gourmet foods Electro Power LLC Electro Power LLC	 Main Phone 9864627622 9864627622 9865727212 9865727212 	Y Address 1: City Y Shawnee Shawnee Shawnee Kansas City Kansas City Kansas City	Email T Julie@gourmetfoods.com Julie@gourmetfoods.com Brunn@Electropower.com Brunn@Electropower.com	CReset CReset CReset CREStatus CAtive CAtive CAtive CAtive CAtive CAtive CAtive CAtive CAtive CREST	d Reco A Mass Acti Address Name Billing address Shipping address Billing address Shipping address
Ac	Account	ts - Kansas (8) Account Name 7 Gourmet foods Gourmet foods Electro Power LLC Electro Power LLC Bolt Fencing solutions	 Main Phone 9864627622 9864627622 9865727212 9865727212 9857267287 	Y Address 1: City ▼ Shawnee Shawnee Shawnee Kansas City Kansas City Kansas City	de Data	CReset CReset CReset CRESE C	d Reco A Mass Acti Address Name Billing address Shipping address Billing address Billing address Billing address
Ac	Account	ts - Kansas (8) Account Name Gourmet foods Gourmet foods Electro Power LLC Electro Power LLC Bolt Fencing solutions Bolt Fencing solutions	 Main Phone 9864627622 9864627622 9865727212 985572712 9857267287 9857267287 	Y Address 1: City ▼ Shawnee Shawnee Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City	te Data	Creset Creset	d Reco A Mass Acti Address Name Billing address Shipping address Billing address Billing address Billing address Shipping address Shipping address
Ac	Account	ts - Kansas (8) Account Name Gourmet foods Gourmet foods Electro Power LLC Electro Power LLC Bolt Fencing solutions Bolt Fencing solutions Woodgrove Bank	 Main Phone 9864627622 9864627622 9865727212 985727212 9857267287 9857267287 9857267287 9857267287 9857267287 	Y Address 1: City ▼ Shawnee Shawnee Shawnee Shawnee Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City Kansas City	de Data	Creset Creset	d Reco A Mass Acti Address Name Billing address Shipping address Billing address Billing address Shipping address Billing address Billing address

The Layer menu will list both of the addresses, the Billing address and the Shipping address for Accounts.



While working with any enclosed shape like proximity, drawn shape or a territory, user can click on the enclosed shape to view the Summary card. The below screenshot shows Proximity search performed on the above Accounts that were plotted based on two addresses Billing address and Shipping address.

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With the click on the outer circle it is showing the Summary card for the same. Within the summary card, the Total Records will show the count based on the total number of pushpins plotted on the map i.e. 7 pushpins in total.

The second section of the Summary card shows the classification of the count of records based on the two types of the addresses i.e. 4 pushpins are plotted based on the Billing address and 3 pushpins are plotted based on the Shipping address.

In the third section, it shows the summary of the Annual revenue and the no. of Employees based on the actual(unique) count of the records plotted i.e. 4 Accounts.

Proximity 2 : 9 Miles

Area: 660433871.71 Square Meter

Total Records: 7

Account - (Accounts - Kansas) Billing address: 4 Shipping address: 3

Account - (Accounts - Kansas): 4 Annual Revenue (Average): \$39,766,797.00 No. of Employees (Sum): 56,940.00

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Point of Interest (POI) Locations

User can search for any geo-tagged Bing-mapped locations called points of interest (POI) like ATMs, restaurants, hotels, coffee shops, etc. near a specified location. This can also be plotted alongside the CRM data. User either can right-click on map to set the location as the POI location or can directly enter the required location in the POI card.



User can either click on any of the POI icons or manually search for required POI location by entering the respective keyword in the search bar.



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Based on the selected POI location icon or the entered keyword, the results will be loaded.

Note:

- The option to enter a keyword to search POI locations is only available while searching in USA.
- For each POI location search, only 25 locations will be plotted on the map.

Apart from plotting POI data, user can also add the plotted businesses in Dynamics CRM record as leads, accounts, contacts, or any custom entity by using the Create New Record option in the POI card or Contextual menu. (Refer to Contextual menu section)



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Proximity Search

User can search for the nearby records around a required location using Proximity Search. This will help the users to understand the proximity of the nearby records in regards to the selected location. There are two different options to perform a Proximity Search:

- 1. Proximity by Distance
- 2. Proximity by Time.

<u>Current Location</u>: User can select any location or a record as the current location. This is used to specify the center point for the Proximity search. By default, this field displays the address stored in the Maplytics personalized record of the logged in user. This is always represented by a green color pushpin on the map and also indicated right next to the current location message box.

Proximity by Distance

This option will calculate the straight-line distance between the current location and all the points which fall in the proximity parameter as shown below:



Enter the radius for the Proximity search. The user can also add decimal values with a scale of 2 for the radii. The Proximity can be provided either in Miles or Kilometers. The User can also hover over a pushpin and see the distance from current location.

Concentric Proximity Search

This new addition to Proximity based on Distance allows users to perform up to 3 proximity searches simultaneously. The user needs to enter the distance values separated by a comma (,) and all the points that fall in the defined proximity parameter will be plotted.



The Concentric proximity zones are represented by different colors for easy visual analysis. The user can also click on individual proximity zones to highlight the circle and open the Summary Cards for that proximity parameter.

The user can also filter the data points based on the proximity zone and their proximity distance from the current location in the 'View Data' grid.

A	ccounts	- Staten Island (130)							C Reset 🛛 🛱 Re	lated Records	 Mass Actions
		Account Name	т	Primary Contact	T	Main Phone	т	Shortest Travel Distance	Line-of-Sight Distance	Proximity Zone	T
6		Abbas & Sons				7188520069		2.5	1.8	1	2
6		Abdelmessih & Sons		Abraham McCormick		2122501122		2.04	1.3	2	2
6		Adamita & Sons		Adrienne McMillan		2124180645		0.43	0.3	9	1
6		Adams & Sons		Benno Kurmann		2122068501		1.55	1.	1	2
6		Aguayza & Sons				2123082665		3.21	2.9	5	3.56
ā		Aiello & Sons				2128165282		3.88	2.8	5	3.56

Note: User can enter integer value from 0.1 to 2000 for distance proximity search.

Show Travel Distance

While performing Proximity Search by Distance or Time, if the user wants to see the actual travelling distance from the current location till each of the individual pushpins, they can select the checkbox of 'Show Travel Distance' to view the Shortest Travel Distance on the hover and view data grid.

Ac	counts	- Staten Island (103)			C Reset ₽	Related Records	 Mass Actions 	
		Account Name	Primary Contact 🛛 🔻	Main Phone	Shortest Travel Distance 🛛 🔻	Line-of-Sight Distance	▼ Proximity Zone	Ţ
6		Abbas & Sons		7188520069	2.5		1.84	3 🔺
6		Abdelmessih & Sons	Abraham McCormick	2122501122	2.04		1.32	3
6		Adamita & Sons	Adrienne McMillan	2124180645	0.43		0.39	3
6		Adams & Sons	Benno Kurmann	2122068501	1.55		1.1	3 🗸

Show Travel Distance for Truck

Plot Records	\times
2 🗶 🗶 🗮 日	
Filter	^
Cluster Map	
Current Location	
9 Amy Ct, Staten Island, NY 10	13:
Proximity	
Distance O Time	
1,2,3 Miles	~
Show Travel Distance	
Select Asset	
Select Ass 🗙 Select Haz 🗙	
Datasource	^
Select Datasource	
Accour 🗸 🛛 All Accour 🗸 🎈	
+	
Select Category	

Once the user selects the option of 'Show Travel Distance', user will get an option to an Asset and Hazardous material. This will provide the list of the assets created in the Asset entity within the CRM. If the user wants to search for the shortest travel distance for truck, they can choose to select the respective Asset and if any Hazardous material is being carried out or select none from the following list:

- Combustible
- Corrosive
- Explosive
- Flammable
- Flammable Solid
- Gas
- Goods Harmful To Water
- Organic
- Poison
- Poisonous Inhalation
- Radioactive
- Other
- None

Note:

- If user has not selected any asset here, by default, the travel distance will be calculated as per driving by car.
- The feature of 'Show Travel Distance' based on driving by truck uses a separate key. Every time the travel distance is searched based on driving by truck, 3 transaction limits of the key are consumed for each pushpin that appears within the proximity.



Proximity by Time

This option will calculate how many points fall in 'x' minutes or hours of driving distance from current location. The Proximity can be provided in either Minutes or Hours. The User can also hover over a pushpin and see the distance from current location.





Overlay

This helps user to view the Dynamics CRM records along with shape/excel files, existing territories, and ArcGIS Online feature layers plotted on the map. User can also view the 'layer menu' to select or deselect the layers so as to show or hide the same respectively. Using Overlay user will easily be able to understand and analyze the data spread in required shape file regions and territories.

User can select the following three options:

- Territory This option helps the user to select among the list of existing territories
- File This option helps the user to select among the list of shape/excel files. The file should be in a territory in order to be visible in the list.
- ArcGIS This option helps the user to select from among the live feature layers hosted by ArcGIS Online. The file need not be in territory and can be used even with realtime changes.

Plot Records
🚨 🗶 🗶 🖽 日
Filter ~
DataSource ^
Select Datasource
Account 🗸 🛛 All Account 🗸 🎈 🛑 🚦
+
Select Category
Account Select Ca 🗸
Overlay ^
Select Overlay
Select Overla 🗸
Select Overlay
Territory File
ArcGIS e Search

Let us consider a Sales and Marketing Manager of a Food and Beverage brand planning on Sales Area expansion. He would

want to know the demographic of the Target Group in the new area. Knowing the information about the population, their age groups, spending capacities, buying patterns, sex ratio, etc. would be helpful in categorizing them and designing marketing campaigns for them. The sales processes could then be planned to cater to young adults, working population, senior citizens, and so on. Strengthening the location data with demographics would help in better decision making. With the overlay feature, the Manager would be able to-

- View the existing territories within the new area by plotting them over the map and know the head count in all the territories along with other details
- Import external shape/ excel files, save them in CRM and plot the same over the map to view the territorial data in-depth, or
- Seamlessly integrate the ArcGIS Online feature layers with the Map and view the collated data of the new area

Viewing this organized data spread in the new sales area he might decide on targeting 3 main territories with the right population age group and create marketing and selling plans for the young adults there.

Overlay by Territory

User can select the option of Territory and select the territories they want to plot. Along with this, they can also select any datasource & view. This will help them view the datasource records along with the Overlay of territories selected.





Overlay by File

User can select a excel/shape file saved in CRM to plot the same on the map. Further users can select the following options as well.

<u>Category Attribute</u>: An attribute can be selected to categorize the regions plotted by file. <u>Summary Attributes</u>: One or more attributes can be selected to show the same in the Summary card. The attributes selected within the 'Configuration' of the saved file in the Territory Entity will be selected by default. User can deselect them in the plot card and can select other attributes.

Users can also uncheck the option of 'Plot All Regions' if they do not want to plot all regions from the file. In this case, they can right click at any location on the map to select the option of 'Show region' from the Contextual Menu. This will help them to view the region for the respective selected location. User can again click on 'Hide Region' from the Contextual Menu to hide the region for the respective selected location. Further, user can also open the respective territory within which the file is saved using the 'Open record' button on the Summary card.



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Save Shape/Excel file in territory

A file should be saved in a territory in order to be visible in the list of the files to be plotted as an Overlay. Follow the steps mentioned below to save the shape/excel file in a territory:

- Go to Settings > Business Management > Sales Territories > Create a sales territory > Save
- Go to Territory Map Preview > Select Option > Shape file/Excel file > Save



Save Shape file

Within the Territory Map preview, user can select the option of 'Shape file' and select the color to view the regions in the same.



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Save Excel File

Within the Territory Map preview, user can select the option of 'Excel File' to select an excel file to the territory. User can also select the color to view the regions in the same. They further need to select the following options in order to save the excel file as per their requirement:

<u>Select Region Type</u>: User should select the region type based on which the boundaries of the regions from the excel file is to be plotted.

<u>Select Region Value</u>: User needs to select the column from the excel file that contains the values for the selected Region Type.

<u>Select Main Region</u>: User needs to select the column from the excel file that contains the value for the biggest region for the selected Region type in order to plot the regions accurately. For example, if the Region type selected is Postal code, so the Main Region should be preferably Country. If the column of country is not available then the column with the values for respective States or Cities can be selected.

Excel File Choose File Staten es.xlsx Supported file type: .xlsx and .csv Select Region Type Postal Code zip	
Save Plot Region New Brunswick set set of the Region Ration Perth Amboy	Upper New York Bay PARKVILLE PARKVILLE BERGEN BEA Floyd Bennett Floyd

Convert Overlay to territory

User can use this button to convert an overlay record to a territory. After the overlay record is converted, it becomes a territory which can be searched in the option of 'Territory' in Overlay.

	New	🗊 Delete	🖔 Refresh	祷 Conv	ert To Territory	🖙 Email a	a Link 🖉
	TERR USA	itory A Census I	by State				
Genera	al De	fine Geograp	ohy Configu	irations	Territory Map	Preview	Related
Те	erritory I	Name *	USA Census	by State			

Note:

- Supported file types for shape files are .shp, .kml and .geojson and excel files are .xlsx, .csv
- In a territory, either a shape/excel file can be saved or geographies can be created
- Only one shape/excel file can be saved in one Territory

Overlay by ArcGIS Online

User can begin with establishing a seamless integration between Maplytics and ArcGIS Online with a few configuration steps. Once done, the user can select from among the various feature layers available online on the ArcGIS portal and plot the same on the map. Further users can select the following options as well.



<u>Category Attribute</u>: An attribute can be selected to categorize the regions plotted using the ArcGIS feature layer. The plotted regions are differentiated with multiple colors. This visual representation makes regional analysis easy.

<u>Summary Attributes:</u> One or more attributes can be selected to show the same in the Summary card. All attributes will be selected by default. User can deselect them in the plot card and can select other

attributes. Attributes selected in summary attribute field will also be displayed when hovered over region boundary.

Integrate ArcGIS Online with Maplytics

For a seamless integration and to be able to utilize the hosted feature layers of ArcGIS Online, the user can perform the following steps-

Single factor authentication

Go to Settings > Maplytics Configuration Details > Default configuration record> ArcGIS

🗄 🗖 🔚 Sav	e 📓 Save & Close 🖒 Refresh 🔍 Check Access 🔊 Flow 🗸 🖷 Word Templates 🗸 🗄 🖻 Share 🗸
laplytics - Saved	
ap Configuration Detail	;
eneral Auvance set	
ArcGIS user credentials	
Esri Authentication	
Enable	
Url	* https://rosered.maps.arcgis.com
User Name	

In case the multi factor authentication option has not been enabled, the user can enter the URL from the ESRI Website, user name and password.

Once saved, the user can avail the option of ArcGIS in the Overlay dropdown.



Maplytics [™] –	User	Manual
--------------------------	------	--------

Plot Records	
2 2 × * •	
DataSource ^	
Select Datasource	
+	
Account Select Ca	
Overlay ^	
Select Overlay	
Select Overla 🗸	
Select Overlay	
File	
ArcGIS	



Multi- factor authentication

The user needs to have a Developer's Account on the ArcGIS Website by Esri. Once an account is created, the user will have his user name and password. Having access to this account, the user can select the feature layer that is suitable for his overlay needs.

Go to Settings > Maplytics Configuration Details > Default configuration record> ArcGIS



Maplytics - Saved Map Configuration Details General Advance Setti	ngs Check-In ArcGIS Auto Scheduling Real-Time Tracking Related \vee		
ArcGIS user credentials			
Esri Authentication Enable			
Url	nttps://rosered.maps.arcgis.com		
User Name	* ZZZZZ XLPTI HPOKL ADEOG SDOLV PFUEE TUSKH PGGFQ EPLDC LCMHT VVKRKEQKJA NQLFW TTEXV NANML HMQ		
Client ID	* 2kl702wDTlwjdpGz		
Client Secret	* 308ec55d66d24b80983d9eb1becfc166		
🔒 Esri Redirect Url	https://apps.powerapps.com/play/e/c69c8778-8541-e3ce-99f2-cedf735f16d7/a/7367749a-f2ef-4758-95e4-42d70d6a00		

The user needs to provide a Client ID and a Secret Code that is available for the developer account. On saving the entered configuration record, a redirection URL gets generated.

arcgis.com /sharing/rest/oauth2/authorize?clien	t_id=2kl702wDTlwjdpGz&redirect_uri=htt
Testing Purpose wants to access your Arco	GIS Online account information ?
Sign in with	esri
ArcGIS login	^
لَمُ xxxxxx	
₽	
Sign In	Cancel
Forgot username? or F	orgot password?
Your ArcGIS organization's UR	RL Ý
0 0	GO
	Privacy

	Uashc	ooard OAuth 2.0 Layers Downloads
< Testing Purpose 🔅		Using OAuth 2.0
⊙ Created: January 5, 2023 ⊙Mo	dified: January 5, 2023	Configure redirect URIs
verview Proxies Usage Settings		Step by step instructions on creating an application and using ArcGIS Platform
		services.
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OAuth 2.0 Credentials		Learn about the basemap layer, geocoding, route, and GeoEnrichment services.
OAuth can be used to authenticate ArcGIS more about OAuth 2.0 in the security and a	users to access content and location-based services on behalf of the authenticated user. Learn authentication guide.	
Client ID		Configure a proxy service you can use in
•••••	 ● ● 	your app so that your users do not need
Client Secret		to autienticate.
•••••	 ● ● 	
Temporary Token Short lived token for testing. Will expire Fri, 13 Ja	in 2023 11:08:37 GMT .	Developer Guide
Redirect URLs	+ Add URI	Organizations and Portals Build, automate, use, and manage
These are the allowed URLs to redirect use	rs to after completing authorization. See implementing QAuth 2.0 for more internation	
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This URL needs to be put up on the ArcGIS Developer's Account.

← 🗹 🔒 Save 🛱 Sa	ave & Close 🚯 Authenticate Esri 🖒 Refresh 🔍 Check Access 🔊 Flow \vee 🗄 🖄 Share 🗸 🖓	÷			
Maplytics - Saved					
General Advance Setting	gs Check-In ArcGIS Auto Scheduling Real-Time Tracking Related \sim				
ArcGIS user credentials	ArcGIS user credentials				
Esri Authentication Enable					
Url +	https://rosered.maps.arcgis.com				
User Name +	ZZZZZ XLPTI HPOKL ADEOG SDOLV PFUEE TUSKH PGGFQ EPLDC LCMHT VVKRKEQKJA NQLFW TTEXV NANML HMQ				
Client ID *	2kl702wDTlwjdpGz				
Client Secret *	308ec55d66d24b80983d9eb1becfc166				
🛆 Esri Redirect Url	https://apps.powerapps.com/play/e/c69c8778-8541-e3ce-99f2-cedf735f16d7/a/7367749a-f2ef-4758-95e4-42d70d6a00				
Client ID * 2kl702wDTlwjdpGz Client Secret * 308ec55d66d24b80983d9eb1becfc166 A Esri Redirect Url https://apps.powerapps.com/play/e/c69c8778-8541-e3ce-99f2-cedf735f16d7/a/7367749a-f2ef-4758-95e4-42d70d6a00					

A new button, 'Authenticate Esri' will then appear on the Maplytics Default Configuration page. On clicking this button, the user will get a window to enter username, password and code. Once done, a connection will be established between Maplytics and user's ArcGIS Account allowing an access to Feature Layer hosted by Esri

Home Gallery Map Sce	ene Groups Content Organiz	ation	Q 🛕 🏭 👰 🔤
Content		My Content My Favorites	My Groups My Organization Living Atlas
H New item	Q Search		I Table
Folders 🖆	1 - 13 of 13 in EmmaSmith23		
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Filters	NY_ZIP_CODE_04011	🧕 Feature layer (hosted) 🔻	ඩ් <u>ද</u> ් … Jan 7, 2023
✓ Categories	NY_ZIP_CODE_04011	🖹 Shapefile	ඩ් 🏠 🔐 Jan 7, 2023
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Categories allow members to organize items consistently and	Conservation_Areas	Shapefile	ඩ් <u>ද</u> ් … Jan 6, 2023
provide a simple way to browse content in the organization.	NYS_Civil_Boundaries_shp	🧕 Feature layer (hosted) 🔻	ස් Jan 6, 2023
Set up organization categories	NYS_Civil_Boundaries_shp	Shapefile	ඩ් 📩 🔂 Jan 6, 2023
✓ Item type	India_SHP	🧕 Feature layer (hosted) 🔻	ඩ් 六 🚥 Jan 6, 2023
Maps	India_SHP	Shapefile	ඩ් 🏠 💀 Jan 6, 2023
Layers	The_City_Walls	🧕 Feature layer (hosted) 🔻	🔒 🕂 💀 Jan 6, 2023



A code will then be sent on authenticator app which the user has selected while enabling multi factor authentication.

	+ 🖍
792 187	
741 917	
366 826	
036 626	

The User then needs to enter that code and avail an access to an option of ArcGIS in the Overlay dropdown.

Plot Records	×		
🙆 🔮 🗶 🗮			
Filter	~		
DataSource	^		
Select Datasource			
Account 🗸 Select View 🗸			
+			
Select Category			
Account Select Ca 🗸			
Overlay	^		
Select Overlay			
Select Overla 🗸			
Select Overlay			
Territory			
ArcGIS	Search		







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Census data Visualization

This feature helps the user to visualize census data on the map. Census data provides the information about the population for a whole country or parts of country. Visualization of this data on Maplytics will help the user to analyze various information of the required area in a country like Housing units, Area land, Area water, population demographics, etc. and take strategic decisions. A few census data are available by default within Maplytics. These default census data are provided by Bing maps for USA. User can also plot their own census files on the map which contains census data. User can configure categories to see colored regions as per the configuration and also configure attributes to see on Summary card and hover on region.

To plot the census data, user can choose the option of 'Files' in the feature of Overlay. Please refer to the section of 'Overlay'. Further users can select the following options as well.

<u>Category Attributes</u>: An attribute can be selected to categorize the regions plotted by file. <u>Summary Attributes</u>: One or more attributes can be selected to show the same in the Summary card. The attributes selected within the 'Configuration' of the saved file in the Territory Entity will be selected by default. User can deselect them and can select other attributes.



Configuration for Census data

User can configure the Census files provided by Maplytics in the Dynamics CRM. Please refer to the section of 'Configure' in Installation manual for the steps to configure. This will save some census files in CRM provide by Maplytics.

While configuring the census data into Dynamics CRM, territories will get created within which the respective census data will be saved in the form of geographies. To view the saved census data, *Go to Settings > Business Management > Sales Territories.* Following are the territories for census data saved on configuration:

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- England-Cities
- Germany-Postalcodes
- NewYork-Postalcodes
- USA 111th Congressional Districts
- USA Counties
- USA States
- USA-Postalcodes

Configuration for attributes

User can configure the attributes available in the census data/shape files to show on the map, create categories for attributes and select the colors to visualize the categorized data on the map. This allows the user to frame the data how they want to view on the map.

Go to Settings > Business Management > Sales Territories > Territories with census data/shape files saved > Configuration

- <u>Attribute Configuration:</u>
 - Summary Attributes:

User can select the attributes to show on the Summary card shown on the click on the regions in the census data/shape file plotted on the map.

• Hover Attributes:

User can select at a maximum of 6 attributes that will be shown on the hover on the regions in the census data/shape file plotted on the map.

• Data grid Attributes:

User can select the attributes from the census data/shape file to be shown as columns in the data grid in Detail map.

Attribute Configuration					
Summary Attributes	Actions	Hover Attributes	Actions	Data Grid Attributes	Actions
Select Summary Attribute(s)	+	Select Hover Attribute(s)	+	Select Grid Attribute(s)	+
Name	Ê	Name	Ê	Name	Ê
Population	Ê	Population	Ê	Population	â
Area_Land	Î	StateCode	ŵ	Area_Land	Ô

<u>Category Configuration</u>

User can create categories for the attributes in the census data/shape file. Creating categories will help the user to view the categorized census data for the required attributes in the desired colors. Some categories are provided by default for configured census data. User can click on + New New button to create a new category for any attribute. User can also click on < 'Edit' and [®] 'Remove' to make changes or delete the existing categories respectively.

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Create Categories	+ New
Name	Actions
Population	/ 前
Area_Land	/ 🛍
Area_Water	1
Pop_Over16	1
Pop_Male_Over16	× 🛍
Pop_Female_Over16	∕ ≞ ·

Create filters and define colors

After clicking on Edit/New button, user can filter the attributes and define colors for the ranges of the filtered attributes.

- **Attribute:** This shows the name of the Attribute for which the category has been created/will be created.
- **Display Name:** User can type a name for the category which should be displayed in the list of the categories.
- Save: User can click on save button to save the changes made.
- **Discard:** User can click on Discard button to discard the changes made.
- **Filter:** User can set various filter conditions for the category.
- Value: User can set values for respective filters set.
- Color: This can be used to set colors for individual filters set. The user can click on the
 Auto Set button to set random colors for all the values.
- Add/Remove: Click on Add or Remove to add a new filter or delete the filter respectively.

Attribute	Population	Display Name	Population			>4 X
Attribute	Filter	Value		Color	Add	Remove
Population	Is Less Than Equal To \checkmark	1000000		#88d8]	+	×
Population	Is Between 🗸	1000000	_ 2000000	#fc0c6	+	×
Population	Is Greater Than Equal \checkmark	2000000		#80010	+	×

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After the user has created categories, user can plot the census data along with an attribute selected to visualise the categorised Census data on the map as shown below:





Shape Operations

With the help of Shape operations, users can perform Binary operations on the shapes drawn on the map. These operations can only be performed under the Search option of 'By Drawing' in the Plot card and Territory management section. Please refer to the section of Territory management for the shape operations in Territory management.

User can open the 'by drawing' search option and right click on the shapes and can choose the option of 'Shape operations'. The following five operations can be performed on the shapes:

Difference

This highlights the shape(s) obtained by subtracting the overlapped ones from the selected shape





Intersection

This highlights the shape(s) where the selected shape and other shapes overlap.



Union

This adds all the shapes overlapped on the selected shape



Union Aggregate

This performs union operation on all the shapes that are drawn on the map. If a shape does not overlap with any other shapes, it highlights such shapes and the union of the rest of the overlapping shapes.



Disjunctive union

This highlights the shapes that are not overlapped and lie in the selected shape & the shapes that are linked with the selected shape.



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<u>Undo</u> – While performing operations, user can use the option of 'Undo' to go only one step back into the binary operations performed

<u>Reset</u> – Using the option of reset, user can remove all the operations that are performed on the shapes drawn on the map

Note:

- To perform any operation, two or more shapes should overlap.
- For Union Aggregate, there should be more than one shapes with or without overlap.
- The highlighted shapes are new shapes as resultants of the operations performed. User can click on the highlighted shapes to view the summary card and the data in the view data grid.



Territory Management

Territory management helps the user to create new territories manually as well as automatically and align the existing territories as well to get proper distribution of territories. User can plot required regions, draw shapes or directly upload shape files/excel files to get the required regions plotted on the map to create territories for the same. User can create multiple territories automatically based on count of records or use the territory Alignment tool to select the required regions and create new territories for the same. While creating multiple territories automatically, user can also save the territories as a draft and rework on the draft to get the territories created as per the requirement. Further, user can plot the existing territories and edit them to get proper distribution of territories.



Note: Users other than System Admin, can use Territory management only if they are given the role of Maplytics Territory Manager

User can use the search options to plot shape files, excel files, search by region, draw a shape or plot existing territories on the map. There are five search options:

- By File
- By Region
- By Drawing
- By Territory
- By Overlay
- By ArcGIS





By File

This helps user to plot the shape files and excel files on the map that store geographical information and attributes of the geographic features. User can plot the following two types of files:

• Shape files: The supported file formats are .shp, .kml and .geojson



• Excel files – The supported file formats are .xlsx, .csv



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By Region

This options helps the users to search for regions on the map by City, State, County, Country, PostalCode, PostCode Sector, PostCode(Outward Code), PostalCode Area.

Territory Management $ imes$
Search Option
By Region 🗸
Select Region Type
City 🗸
Select Region
City
State
County
Country
Postal Code
Postal Code Sector
Postal Code(Outward Code)
Postal Code Area



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By Drawing

This helps the user to draw a shape on the map using the Drawing Tool Bar.






By Territory

This helps user to plot the existing territories on the map.





By Overlay

Users can select this option of 'By Overlay' to select any shape/excel file saved in CRM to plot the same on the map. Users can also select an attribute within 'Category Attribute' to categorize the regions plotted on map. Also, they can select one or more attributes within 'Summary Attribute' to show on Summary card when clicked on any region plotted on the map.

Territory Management $ imes$			
Search Option			
By Overlay 🗸			
Select Overlay			
Census data - Counties in USA 🗸 🗸 🗸			
Category Attribute Summary Attribute			
Population 🗸 Population, Pop			
	Plot		



Note: If user has plotted any territory or shape/excel file using the feature of 'Overlay' within the 'Plot records' card and moves to 'Territory Management' card so the option of 'By Overlay' will retain the selection of the same while working with Territory Management.

By ArcGIS

This option helps the user to select from among the live feature layers hosted by ArcGIS Online. The file need not be in a territory and can be used even when updated in real-time.

2	Layer Menu	
Å	Territory Management $ imes$	
Q2	Search Option	1
	By ArcGIS 🗸	
ىل	NY_ZIP_CODE_04011	
	Category Attribute Summary Attribute	
	POPULATION V PO_NAME, POP V	
	Plot	

A seamless integration can be experienced with the online files. Users can choose this option to select any live feature layer hosted by ArcGIS Online to plot the same on the map. Users can also select an attribute within 'Category Attribute' to categorize the regions plotted on map. Also, they can select one or more attributes within 'Summary Attribute' to show on Summary card when clicked on any region plotted on the map.



Note: If user has plotted any territory using the feature of 'ArcGIC' within the 'Plot records' card and moves to 'Territory Management' card so the option of 'By ArcGIS' will retain the selection of the same while working with Territory Management.

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Layer Menu

This helps the user to select the required data among the multiple data plotted on the map. The user can use the toggle buttons on the Layer menu card to show or hide the required layers of the data to be shown on the map without removing the same from map. If user is using the 'Plot Records/POI/Directions card' and has plotted Datasource Records, POI locations or Route and has proceeded for Territory Management, the plotted layers of data will be retained and will be listed in the section of 'Plot/POI/Direction Layers' of the Layer menu. The data plotted using the Territory Management card will be listed in the 'Territory Management Layers' section of the Layer menu.

Territory Alignment Tool

This tool has four options respectively as mentioned below:

- <u>Select/Deselect</u>: User can select regions/shapes/territories one by one on the map
- <u>Deselect All</u>: User can deselect all the selected regions/shapes/territories on the map
- <u>Select Multiple</u>: This is a freehand selection which helps the user to select multiple regions/shapes/territories on the map
- <u>Delete</u>: User can delete the shapes/regions/geographies plotted on the map Note: If the delete option is used on the existing territories, it will delete the selected geographies from the existing territories.





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Create new territory

User can select some of the regions/shapes using the 'Alignment Tool' and right click to create a new territory. User can also select the required manager who will be responsible for the respective territory.



Create Territory	×
○ Add To Existing Territory	
Create Single Territory	
10301-Staten Island	
Select Manager	
Select Manager	
○ Create Multiple Territories	
Pro	ceed

Note: Users who have already been assigned as a manager for another territory will not be visible in the list of users to be selected as a manager of the territory.





Auto Territory creation

User can create territories automatically based on a shape/excel file and count of records plotted on the map to get the desired number of balanced territories. To do this, user can go to Territory Management and use the option of 'By File' to upload a Shape file or an Excel file to get it plotted on the map. User can also choose the option of 'By Overlay' to plot a saved shape/excel file on the map.



Now, user can go to the 'Plot Records Card' and select the required 'DataSource' and the respective 'View' to plot the same on the map. These records will be distributed among the territories that are to be created.



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Note: Only those records which lie within the regions selected will be considered while creating multiple balanced territories.

Using the options of 'Select' or 'Multi-select' from the 'Alignment Tool' user can choose the required regions and right click to select the option of 'Create Territory' to open the window. Here, user can select the option to 'Create Multiple Territories' and enter the number of territories they want to create out of the selected regions on the map. In the screenshot below, we have entered 4 for an instance.

○ Add To Existing Territory	Create Territory
Create Single Territory	
Please enter the name of territory	O Add To Existing Territory
Select Geography Name	Create Single Territory
Select Geography Name	Create Multiple Territories
Select Manager	4
Select Manager	
Create Multiple Territories	
	Pro

This will calculate the number of records and divide the selected regions automatically to get 4 balanced territories. By default, territories will be named as Territory_0, Territory_1, Territory_2 and so on. User can change the names as per their requirement.

Note: The count of records in the territories created automatically might vary slightly.





User can also set the required user as a manager for the territories processed, by clicking on the 'Select manager' icon.

Territory List			
	Select All	Actions -	
	Territory_0 Records: 171	Manage Q	
	Territory_1 Records: 108] . Select Manager Bill G Jon P	
	Territory_2 Records: 355		
	Territory_3 Records: 307		

Note: Users who have already been assigned as a manager for another territory will not be visible in the list of users to be selected as a manager of the territory.



User can also set the colors for the territories using the option of 'Fill color'.

User can further choose to take an action on the territories processed on the map by using 'Actions'. There are three Actions available:

<u>Create</u>: If the user is satisfied with the territories processed, then they can choose this option to create the territories processed on the map within the CRM.

<u>Save</u>: If user needs to work on the territories processed to further make any changes or take an opinion on the same from a colleague, they can use this option to save the territories processed as Draft Territories within the CRM.

<u>Realign</u>: User can further rework on the territories processed using this option. This will allow the user to revise the number of territories processed.

Assign territories to record

If user chooses to create territories from the 'Actions', then after creating the territories, user will be asked if they want to assign the territories created to the respective records plotted on the map. User can click on 'Yes' to do so.





Register to Windows Service

If the number of records is more than 9K, then user needs to register to Windows service in order to create multiple territories. With more than 9K records plotted on the map when user tries to create multiple territories then the below message will be shown and these records will be processed by Windows Service. When the user clicks on 'Confirm' then it will create the territory records with the status 'Process by WS' and Windows Service will process these territories by distributing the records to create the specified number of balanced territories based on the number of records.

Confirm!		
Records are more than 9K, these will be processed by windows service. We will email you once the process completes.		
	CONFIRM	CANCEL

Windows service runs at the interval that user will set. For example, user can set it for every 1 hour. When windows service runs and finds territories with the status 'Process by WS' then it will process them one by one. It takes one territory and performs the logic and distributes the records properly to create the respective number of territories and while updating these territories it changes the status of those territories to draft. User can plot this draft territory and create the respective territories into the CRM.

To install Windows Service, user can go to the 'Batch processing tool'.

1. To get the tool, Extract the Batch Processing tool .zip file from the extracted Zip folder of downloaded Maplytics solution.





2. Run the *BatchProcessingTool* as Administrator as shown below.

Name	Date modified	Туре	Size
Territory_Distribution_Windows_Service	09/20/2020 4:02 PM	File folder	
BatchProcessingTool.exe	00/20/2020 A-01 PM	Application	274 KB
BatchProcessingTool.vsl Open		tion	24 KB
🗟 ClosedXML.dll 🛛 🎈 Run as adm	ninistrator	tion exten	1,023 KB
🗟 DocumentFormat.Open 🕓 Share with S	Skype	tion exten	5,564 KB
StreelNumberFormat.dll Troublesho	ot compatibility	tion exten	27 KB
FastMember.dll Pin to Start		tion exten	23 KB
🗟 Microsoft.Crm.Sdk.Prox 🦲 Move to Or	neDrive	tion exten	275 KB

3. Once the user runs the tool, the following window will open where they need to enter the credentials and click on 'Next'.

Login	
Deployment Type:	e: On-premises • Office 365
Sign in as cu	urrent user
Display list o	of available organizations
Show Advan	nced
Advanced	
Online Region	North America 🗸
User Name	
Password	
Login	Cancel

4. Once user clicks on 'Next', it validates the credentials and if credentials are valid then the below window shows up. Here, user needs to select the option to Install/Uninstall Territory Distribution Windows Service and click on 'Install'.



Once clicked on 'Install' the 'Territory Windows Service' will be installed in the PC as shown below. User can click on 'Uninstall' to uninstall 'Territory Windows Service'.

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User can start and stop windows service using 'Start' and 'Stop' button.

Services File Action View Help				
	È 📑 🛛 🖬 🕨 🖬 🕪			
🧟 Services (Local)	Services (Local)			
	Inogic.Maplytics.TerritoryDistribution	Name î		
	Start the service	IIS Admin Service INS Admin Service INS Admin Service		
		Inogic.Maplytics.TerritoryDistribution		
		Intel(R) Content Protection HECI Service		

To update the windows service run interval, user needs to change "RUNINTRERVAL" in the app config of windows service (Inogic.Maplytics.TerritoryDistribution.exe.config).

Name	Date modified	Туре	Size
Inogic.Maplytics.TerritoryDistribution.exe	09/20/2020 10:51 PM	Application	82 KB
Inogic.Maplytics.TerritoryDistribution.exe.config	09/20/2020 10:53 PM	XML Configuratio	1 KB
Microsoft.Crm.Sdk.Proxy.dll	09/27/20		
Microsoft.IdentityModel.Clients.ActiveDirectory.dll	09/27/20 Inogic.	Viaplytics. lerritoryDistribut	ion.exe.config - Notepad
Microsoft.IdentityModel.Clients.ActiveDirectory.Pl	09/27/20 File Edit	Format View Help	
Microsoft.ldentityModel.dll	03/07/20 xml vers</th <th>on="1.0" encoding="utf</th> <th>-8"?></th>	on="1.0" encoding="utf	-8"?>
Microsoft.Rest.ClientRuntime.dll	09/27/20 <configura< th=""><th>tion></th><th></th></configura<>	tion>	
Microsoft.Xrm.Sdk.Deployment.dll	09/27/20 <sup< th=""><th>ortedRuntime version=</th><th>"v4.0" sku=".NETFrame</th></sup<>	ortedRuntime version=	"v4.0" sku=".NETFrame
Microsoft.Xrm.Sdk.dll	09/27/20 <th>p></th> <th></th>	p>	
Microsoft.Xrm.Tooling.Connector.dll	09/27/20		
Newtonsoft.Json.dll	01/28/20 <appsett< th=""><th>ngs file=""> I</th><th></th></appsett<>	ngs file=""> I	
 Microsoft.Xrm.Tooling.Connector.dll Newtonsoft.Json.dll 	09/27/20 01/28/20 <clear></clear> <add ke<="" th=""><th>ngs file=""> y="RUNINTERVAL" value</th><th>e="30" /></th></add>	ngs file=""> y="RUNINTERVAL" value	e="30" />

Note: Make sure the PC in which the Windows Service is installed is running all the time because if the PC is turned off, the Territory Windows Service will also get turned off and it will not perform any task.

Draft territories

If the users need to further work on the territories processed or needs to make any changes, they can choose the 'Save' from the Actions and save the territories processed as a 'Draft territories' within the CRM.

	Save As Draft	×
Create New [Draft Territory	
Staten Island		
) Update Existi	ng Draft Territory	
		Sovo
		Save

Territory List		
✓	Select All	Actions -
		Create
✓	Territory_0	Save
	Records: 171	Realign
✓	Territory_1	
	Records: 108	
_		
<	Territory_2	
	Records: 355	
_	T 1	
✓	lerritory_3	
	Records: 307	

After saving a draft, user can use the option of 'By Territory' within the 'Territory Management' card to plot the draft territories saved in CRM and rework on them. Further, user can choose to save it again as a draft with the updates done or create the respective territories in the CRM using the option of 'Create' from the Actions. If user wants to create the respective territories from the draft, they can also choose whether or not to delete the respective draft territory.



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Create territory on one click

User can create multiple territories with a single click on 'Create Territory' button. User can plot shape files or excel files on the map to view the shapes required as geographies and follow the steps mentioned below to create territories:

By Shape file

After plotting a shape file on the map, user can click on the 'Create Territory' button to create a new territory with the plotted shapes as geographies or create the plotted shapes as geographies into a selected existing territory.



Add to Existing te	erritory	
Create Single Terr	itory	
Please enter the na	me of territory	
Select Geography N	ame	
Select Geography N	lame	
Select Manager		
Select Manager		
Create Multiple Te	erritories	

User can provide the name for the new/existing Territory to be created and select the column from the excel file for 'Select Geography Name' and the respective names of geographies will be fetched from the file.



By Excel file

After plotting an excel file, user can click on the 'Create Territory' button to create territories with the shapes plotted on the map as Geographies. The names of the territories and the respective Geographies will be fetched from the excel file.

The excel file should in the supported file format as mentioned below.

Name: Name of the Geography.

Search Option: Bulk geography feature is available only for the 'By Region' option, so this value should always be '1'.

Color: Color should be in Hexadecimal format i.e. (#DAF7A6). If the user enters the color in other format then the default color (Blue) will be set.

Edit Colu Edit columns for th	IMNS he saved view. Thes	e columns represe	nt the data that wil	l be displayed in the	: view.	×
Name a color	Region Filter	Region Type	Region Value	Search Option	Territory	Common Tasks
		View results are d	isplayed here.			← → ☐ Add Columns ☐ Change Properties ☐ Remove
4					Þ	

Region

Type: There are 6 region types that the user can define to create the geography. (Country, State, County, City, PostalCode1, PostalCode2).

Region Value: If the user needs to create the geography based on Postal Code, then they can define the postal code values in this column. To define multiple geographies in single territory, use the comma separator (,).

Territory: This is a lookup value to define which geography belongs to which territory.

Manager: The names of the users can be provided here. While creating territories, the managers for the respective territories. However, the column of 'Manager' is not mandatory to be in the excel file.

Note: For Territory management:

- The column of 'Territory' should contain the Names of the territory(ies)
- Color: Color should be in Hexadecimal format i.e. (#DAF7A6). If the user enters the color in other format then the default color (Green) will be set.
- There are 8 region types that the user can define to create the geography. (Country, State, County, City, PostalCode1, PostalCode2, PostalCode3, PostalCode4).

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Alignment of Existing territories

User can plot the existing territories and align them to get the proper distribution of the regions. User can use the following two options to align the territories.

Move to

User can select some geography(ies) of one or more territories and move it to another plotted existing territory or create a new territory. This will remove the geographies from the original territory.





Copy to

User can select some geography(ies) of one or more territories and copy it to another plotted existing territory or create a new territory while keeping the geography in the original territory.



Copy to	×
Existing Territory	
10305_Staten Island	
Create New Draft Territory	
	Proceed



Edit Existing Territory

Users can modify the boundaries of the drawn shapes in existing territories using this option. To do this first plot the existing territories on the map. Now, go to the 'Territory List' and click on the 'Edit' button for the required territory and click on the required shape to modify.



Now user will be able to drag the boundaries of the shape to modify it according to the requirement.



Note: Only the territories that contains shapes created using the Drawing tool can be edited by Edit Existing Territory option.

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Shape Operations in Territory Management

User can perform Binary operations on the shapes, regions or territories plotted on the map. User can select the shapes on which they want to perform operations and right click on them to select the Binary operations. There are five Binary options available: Difference, Intersection, Union, Union Aggregate and Disjunctive Union. Please refer to the section of the Shape operations to know more about these Binary operations.

Note:

- The shapes should overlap each other to be available for performing shapes operations
- There should be a layer of drawing overlapped with the shapes on which binary operations has to be performed
- The required shapes should be selected before performing Binary operations

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Defining Geographies for Sales Territory using Maplytics

The users can create sales territories using the native Dynamics CRM 'Sales Territories' feature and define geographies for the sales territories on a map using Maplytics.

To create geographies for sales territory, go to **Settings > Territories** and click on 'New' to create a sales territory. With Maplytics a 'Geographies' Entity is added on the territory. User can use this feature to visualize and create geographies for the sales territory. To create a new geography, click on 'Add New **Geography'**.

NY_USA ^{Territory}		
General Define Geography Territory Map Preview Rela	ted	
Geographies		+ New Geography :
\checkmark Name \uparrow \checkmark	Status 🗸	

In the section '*General*', provide a name for the Geography.

NewYor Geography	k		
General	Map Preview	F	Related
Name	5	*	NewYork
Territ	ory		🖽 NY_USA

Within the section '*Map preview*', the user has the option to visualize the geography on a map 'By Region' or "By Drawing'. The 'By Region' option lets the user to plot the geography based on region types and the user has the freedom to choose the color for the plotted region.

∰	B GEOGRAPHY Postal code 10301		
Gene	eral Map Preview Related		
		W 5th St. E 5th St	100000
	Search Option	Contraction of the second	
	By Region	▼ Kill Van Kull	si St.
	Select Region Type	Richmon RANDALL MANOR	la Isl
	Postal Code	V WEST NEW	story and 3
	10301	I PARK BRIGHTON	1
		WEST BRIGHTON	STAPLETO
	USA	Forest mer	ST Broad St
		or Rd.	CLIFTON
		CASTIFTON 34	- A

The 'By Drawing' option lets the user to plot the geography by drawing a shape on the map and the user can further edit the shape based on their needs.

GEOGRAPHY Drawn shape_Staten Island	
General Map Preview Related	
Westfield Cranford Search Option	Roselle
By Drawing Define Shapes	ARLINGTON WEST NEW BIGHTON Linden Municipal Airport
Colonia Uselin	Rohwey TRAINS Avenel 5 5 5 5 5 5 5 5 5 5 5 5 5

Note: User can define multiple geographies for a single territory.

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Hierarchal Territories

Dynamics 365 supports the hierarchy of territory where user can manage multi-level territories. If an organization has enabled the Hierarchical territories in the CRM, the users can plot the territories to plot and manage multi-level territories. So, if there are any child territories created for the selected territories, then those will also get plotted on the map along with the selected territories.

User can select and plot the territories on the map using the three ways as follows:

• By Territory using plot card in Detail map

User can open the Detail map to choose the icon of 'By territory' ⁽¹⁾ in the Plot card. They can select the territories from the list, select Data source & view and click on Search to plot the same.





• By Territory using Territory Management in Detail map

Within the Detail map, user can click on the icon of 'Territory Management' 🗮 and select the option of 'By territory'. Now, select the territories and click on Plot.



• Overlay in Detail map

User can use the option of Overlay within the Plot card or Territory management to plot the territories.



Note:

- System admin and Territory Manager will have access to all territories
- The visualization of the territories to the rest of the users will be dependent on the usage of the option of 'Show All Territories' within the Default Configuration Detail record > Advanced Settings > Configure Option>Show All Territories. If the option is not selected then the user will be able to view only the territories for which they are the Territory Manager or the member.
- If a user is the Territory Manager or the member of a parent territory, then the user will be able to access the child territories as well, either using the Maplytics maps as mentioned above or by going to the respective child territory records within the Territory entity to visualize it in the Territory Map Preview.

Bulk Geographies by uploading an Excel file

The users also have the option to upload multiple geographies through an Excel files supported by CRM using the Bulk Geographies feature in Maplytics.

🗙 delete 👻 🖘 email a link 🔍	XII EXCEL TEMPLATES ▼	🔩 EXPOR	TO EXCEL
≁ My Imports •	Create Excel Template Create Excel Template		
✓ Import Name	Status Reason	Successes	Partial F



To upload the geographies in bulk, the user first needs to export an Excel template. Go to *Settings > Data Management > Imports >* select the *'Excel Templates'* and then click on the 'Create Excel Template' option. Select the 'Excel Template' and in the 'Select

data' section, select the 'Geography' Entity in the 'Filter by entity' field.

Click on 'Edit Columns' and select the below columns;

The excel file should in the supported file format as mentioned below:

Name: Name of the Geography.

Search Option: Bulk geography feature is available only for the 'By Region' option, so this value should always be '1'.

Color: Color should be in Hexadecimal format i.e. (#DAF7A6). If the user enters the color in other format then the default color (Blue) will be set.

Edit Column Edit columns for the saved	S view. These columns represent the data that wi	ll be displayed in the view.	×
Name 2 color Regio	n Filter Region Type Region Value	Search Option Territory	Common Tasks
	View results are displayed here.		Add Columns
4		•	



Region Type: There are 6 region types that the user can define to create the geography. (Country, State, County, City, PostalCode1, PostalCode2).

Region Value: If the user needs to create the geography based on Postal Code, then they can define the postal code values in this column. To define multiple geographies in single territory, use the comma separator (,).

Territory: This is a lookup value to define which geography belongs to which territory.

Note: For Territory management:

- The column of 'Territory' should contain the Names of the territory(ies)
- Color: Color should be in Hexadecimal format i.e. (#DAF7A6). If the user enters the color in other format then the default color (Green) will be set.
- There are 8 region types that the user can define to create the geography. (Country, State, County, City, PostalCode1, PostalCode2, PostalCode3, PostalCode4).

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Multiple Territories assigned to records

If a user needs to assign more than one territory to the entity records, user can enable the feature of Multiple Territories for a record. This feature will help the user to visualize records which lie in single or multiple territories. After assigning the territories, they can plot the territories to visualize the respective records lying into them.

To start using the feature of Multiple Territories for a record, user can follow the steps mentioned below:

Step 1: Enable Multiple Territories

Go to Settings > Maplytics > Maplytics Configuration Details > Default configuration detail record > Configuration option > Select 'Enable Multiple Territories'.

Note: User cannot undo this option, once selected and saved.

Step 2: Creating N: N relationship of entity with Territory.

Go to Settings > Customizations > Customize the System > Entities > Select Entity > N: N Relationships > New Many-to-Many Relationship

Step 3: View the list of territories assigned to a record

User can add a sub-grid to show the territories that an entity record is associated with. This step is optional, even if a sub grid is not added, the assigned territories will get associated with the records in background.

Territories	+	⊞
Territory Name ↑	Manager	
Sales 3		
Services Territory		
<		×

Step 4: Select relationship for the field 'Territory Relationship' in Attribute mapping section of Entity map.

Go to Settings > Maplytics > Entity maps > Attribute mappings > Territory Relationship > Select 'Entity - Territory' relationship

Step 5: Assign territories to records

User can either run **Batch Processing tool** or the **Inogic.Maplytics.AssignTerritoryWorkflow** on the records to assign the territories to the records.

After assigning the territories, user can choose the Search option of 'By territory' to plot the territories along with the respective records. The below screenshot shows two territories plotted on the map, 'Staten Island – 10306' and 'Staten Island- Mid' which overlap on each other and have pushpins in common as highlighted.





Detail Map on CRM Dashboard

To include the Maplytics Detail Map component on the Dashboard, click on the 'new' button and select 'Add Web Resource'. Select '*ikl_/Maplytics/Maplytics.DetailMap.html*' web resource. The User can further modify this web resource by including some custom parameter. For Example, if the user wants to plot a route from a dashboard like Appointment Planner. The user can automate the complete process.

Add an existing we	b resource to the Form.	
General Forma	atting Dependencies	
Web resource	* iki_/Maplytics/Maplytics.DetailMap.html	
Field Name a	nd Properties	
Name *	WebResource_ Route	
Label *	Route	
Display lat	pel on the Form	
Visibility Visible by	default	
Visibility Visible by	default	
Visibility Visible by Web Resource Custom Param	e Properties Appointment Planner Dashboard true eter(data)	
Visibility Visible by Web Resource Custom Param	default a Properties Appointment Planner Dashboard true leter(data) trict cross-frame scripting, where supported.	
Visibility Visible by Web Resource Custom Param Rest	default Properties Appointment Planner Dashboard true trict cross-frame scripting, where supported. s record object-type code and unique identifier as parameters.	
Visibility Visible by Web Resource Custom Param Rest Pass E national	default Properties Appointment Planner Dashboard true ieter(data) irtict cross-frame scripting, where supported. is record object-type code and unique identifier as parameters. ble for tablet	

Custom Parameter(data) : You need to provide the Custom Parameter(data) as

- <Dashboard Name>||dashboard||true
- Appointment Planner||dashboard||true

The recommended number of rows in formatting is minimum 10.

Select the number of	rows the control occupies.	
Number of Rows	10	



Saved Template Visualization on CRM Entity Form

Users can include the Maplytics Detail Map component that loads a saved template associated with the Entity record on the Entity Form. For this, the user needs to create a 'Template' lookup field on the Entity form where user can select the required Maplytics Template. The user also needs to select the name of that field in the 'Template' field under 'Define Attributes' section on the Entity Map for that particular entity.

entity MAP account					
General Attribute Mappir	ngs Tooltip Mapping	Category Configuration	Configuration	Advance Setting	s Related
Title * Account Name			Contextual	Search Tax	x Exempt Numb
Template Land Area					

On the Entity form, the user needs to 'Insert' a new Tab and select 'Add Web Resource'. Select '*ikl_/Maplytics/Maplytics.DetailMap.html*' web resource. The user now needs to add a Custom Parameter for the saved templates. The recommended number of rows in formatting is minimum 10.

Custom Parameter (data): Provide the Custom Parameter(data) as *savetemplate*

General Formatting Dependencies	
Web resource *	
	_
Name* WebResource_template	
Label * template	
Display label on the Form	-
Visible by default Web Resource Properties	
savetemplate Custom Parameter(data)	
Restrict cross-frame scripting, where supported.	
Pass record object-type code and unique identifier as parameters.	
 Pass record doject-type code and unique identifier as parameters. Enable for tablet 	



Now, when the user selects a Maplytics Saved Template on the 'Template' lookup field on the Entity form, the selected template will be plotted on the Detail Map component added on the Entity form.

nmary Map Project Price Lists	Details	Field Service	Scheduling	Rela
Ticker Symbol				
Relationship Type				
Product Price List				
Template			C3	
Land Area				





Routing Optimization

User can select some locations on the map as waypoints to plot an optimized route. User can follow this route to visit the required locations and complete their meetings. User can also redirect themselves for turn-by-turn navigation in order to reach the right location on time.

Directions Card

Directions card provides the user with all the routing features. The user can open the Directions Card directly by clicking on Directions tab.

The Directions Card also opens up when the user adds a waypoint(s) to the route either through the Contextual Menu, ToolTip Card or using the 'Add to Route' mass action. User can select the required waypoints and the leaving/arriving time. The user can drag and drop the waypoints to change the order of route

Directio	ons			×
()	£ 🙊	# 🔁		
Option	s			~
≡ 🖪	I. YUJI	KANEKO	& SONS:	620 £ ×
= B	R. TAH	IR DEMIR	CIOGLU	& SOI ×
= G	R. PET	ER CHIAI	VG & SON	NS: 18 ×
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	Leave no	w	Leave at	
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	•	10		
	1	May 202	1	-
c	мт	W/T	F	

Directions	Х
Options	^
Miles	○ Kilometres
○ Shortest Time	Shortest Dista
Optimize Dire	Avoid Highways
Avoid Toll Roa	□ Traffic
🗆 Along The Ro	
 ■ From ■ To ⊕ Add destinatio ① Leave now Open Saved Routes 	n Go
Select Start Date *	
Select End Date *	
Search	

Note: The user can add a maximum of 25 waypoints in the direction functions.



Once the waypoints are selected, the user can choose the mode of transports like Driving, Walking, Transit or Truck to view the route.

The user can select different options to reduce the time, toll, highways, etc. by clicking on the Options button. Some of these can be auto-selected using Maplytics Configuration Settings.

Note: To start using Truck route, please contact crm@inogic.com

D	Directions X					
	- f R H					
1	Options	^				
	 Miles 	○ Kilometres				
	○ Shortest Time	Shortest Dista				
	Optimize Dire	Avoid Highways				
	🗆 Avoid Toll Roa	□ Traffic				
	Along The Ro					

Truck Route

To start using Truck route, please contact <u>crm@inogic.com</u>. Once the user has contacted us at <u>crm@inogic.com</u> for the truck route, the user will be provided with a Maplytics license with Truck routing enabled into it. To start using Truck route, user needs to update the license and then configure as mentioned below:

Update the license: Go to Maplytics App > Settings > License registration > Click on Activate.

Configure: Go to Maplytics App > Settings > License registration > Configure Tab > Configure. Here the Asset data will be configured to the users Dynamics CRM.

Maplytics Con	figuration			×		
Core Records	Sales	Customer Service	Field Service			
Shape Layers	Assets D	Data				
Assets Data						
	Name					
	Trailer 1					
	Trailer 2					
	Trailer 3					
	Trailer 4					
	Trailer 5					
	Trailer 6					
Create Perso	Create Personalized Records Proceed					

Assets data configuration will create some sample records for Trucks which user can select while using the feature of Truck routing. User can click on the 'New' button to create new records of Assets. They can also edit and save changes to the configured Assets.

::: Dynamics 365 🗸	Maplytics Settings > Assets P Ø P T ∅ ?	8
=	🖾 Show Chart 🕂 New 🛍 Delete 🛛 🗸 🖒 Refresh 🛛 Email a Link 🖂 🖉 Flow 🗸 🗐 Run Report 🗸 🖷 Excel Templates 🗸 …	
ŵ Home	Active Assets V Search for records	Ø
Recent	✓ Name ↑ ♥ Created On	
A finited V	Trailer 1 3/18/2020 3:34 PM	
Maplytics	Trailer 2 3/18/2020 3:34 PM	
i Maplytics Dashbo	Trailer 3 3/18/2020 3:34 PM	
Entity Maps	Trailer 4 3/18/2020 3:34 PM	
Maplytics Templat	Trailer 5 3/18/2020 3:34 PM	
Maplytics Configu	Trailer 6 3/18/2020 3:34 PM	
Maplytics Security Territories		
🛤 Assets		
ሳጵ ^e Teams		
e* Routes		
lnogic License Det	All # A B C D E F G H I J K L M N O P Q R S T U V W X Y	Z
S Settings	1 - 6 of 6 (0 selected)	

After the sample records for trucks have been configured, user can enable the truck routing. To enable truck routing, go to Maplytics App > Settings > Maplytics Configuration Details > Default Configuration Detail record (with no user) > Advanced Settings > Enable Truck Route.

Maplyt Map Confi	CS guration Details						
General	Advance Setting	s Check-In	Auto Scheduling	Real-Time Tracking	Related		
Config	ure option						
Enab Dista	le Travel nce		Enable Truc	:k Route 🔽		Map in New Window	
Show	/ All Territories		Enable Terr Assignmen	itory 🗌 t Rule		A Enable Multiple Territories	~
User can choose the truck icon on the Direction card to plot the route for a truck. On the selection of the truck icon a window will pop up to enter the Asset details.

Within the Asset Details, user can either select one of the sample truck types or select the custom option to enter their own details and then click on 'Go' to plot the route.

Note: Optimization of the route with the Shortest Distance will not be available when Truck is selected as the mode of transport.

Directions	×
a 🕯 e 🖪	
Options	^
Miles	○ Kilometres
Shortest Time	O Shortest Dista
Optimize Dire	Avoid Highways
Avoid Toll Roa	□ Traffic
Along The Ro	

The Asset Details will be as follows:

1. **Asset type:** The asset for which the route has to be plotted. It can be selected from the following list of configured sample records. User can also

select 'custom' to enter their own details.

- Trailer 1
- Trailer 2
- Trailer 3
- Trailer 4
- Trailer 5
- Trailer 6
- Custom
- 2. *Axles:* The number of axles.
- 3. **Dimension Unit:** The unit of measurement of width, height, length. Can be one of the following values:
 - Meter
 - Feet
- 4. *Height:* The height of the vehicle in the specified dimension units.
- 5. *Length:* The length of the vehicle in the specified dimension units.
- 6. *Width:* The width of the vehicle in the specified dimension units.
- 7. *Weight Unit:* The unit of measurement of weight. Can be one of the following values.
- 8. Weight: The weight of the vehicle in the specified weight units.
- 9. *Hazardous Materials:* List of one or more hazardous materials for which the vehicle is transporting. Possible values are:
 - Combustible
 - Corrosive
 - Explosive
 - Flammable

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×		

Asse	t Details 🏼 🎽
Truck Type	Axles
Select Asset	
Dimension Unit	Height
Select Dimensional 🔻	
Length	Width
Weight Unit	Weight
Pound •	
Hazardous Material	
None 🔻	
	Go →

- Flammable Solid
- Gas
- Goods Harmful to Water
- Organic
- Other
- Poison
- Poisonous Inhalation
- Radioactive
- None

Directio	ons	X
	* 🖻 🖪	
Options	3	^
🔘 Mil	es	○ Kilometres
🔘 Sho	ortest Time	O Shortest Dista
🗹 Op	timize Dire	Avoid Highways
	oid Toll Roa	□ Traffic
	ong The Ro	
≡ (A)	10 Ellsworth	Ave, New York,
≡ 🕒	123 Harold	St, Staten Island
\oplus	Add destinatio	on
		Go

Optimize Direction

This can be selected from the Options. This option will provide the users with the optimized route direction between their waypoints keeping Origin & Destination as fixed waypoints based on Shortest Time or Shortest Distance as per the selection.

Once the user clicks on 'Go' the route will be plotted and the directions will be available on the Directions Card.





User can view all the details regarding the pushpins on the route in the view data grid in the tab named as entity_Route. for example: Contact_Route. Each waypoint on the route will be represented by a pushpin. User can hover or click on any pushpin to view the details of the waypoint. If the waypoints are records saved within Dynamics CRM, it will open the tooltip card on its click showing the respective data configured for tooltip card.

If the waypoint is just a location, on a click it will open a tooltip card showing its address and an icon which can be used to create a record for the location. This includes the Default origin and destination pushpin as well.

3730 Victory Blvd, Staten Isla X
→ DIRECTION → SET AS CU → SET AS PO
3730 Victory Blvd, Staten Island, NY 10314
Take An Action
(D)



User can also choose to show or hide the layer of route from the layer card.



Send Route email:

Maplytics also helps the user to send the route details in an email using 'Send route email' button. This will automatically fetch all the details of the route like the account details, waypoints, links etc. in the mail.



Users can click on 'Show Complete Route' to see the entire route with all the waypoints or use the individual 'Route link' to see the routes between two waypoints. The user will be redirected to their preferred navigation app, Google, Waze, or Apple Maps, to visualize the route on the map based on the app selected in their Map Configuration Detail Record

\leftarrow	⊳ Send	🔚 Save	🛱 Save & Close	🖔 Refresh	🔍 Check Access	Attach File	Insert Knowledge Artic	🔁 Insert Template	\vee 🛛 🖾 Insert Signature	÷	
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	For Sma	artphone / Tab	let user, please use fo	ollowing links:							
	Please (use the below	link to follow complete	e route:							
	Show C	omplete Route									
	Please (use the below	link to follow individua	I routes:							
		Waypoint		Name			Address		Navigation		
		А	Inogic Tech In	dia Pvt. Ltd.		Turbhe MIDC Ro Navi Mumbai Ma	oad, Inogic Tech India Pvt. Ltd. Tu aharashtra	Route Link			
		В	John & Sons			Plot No. 22-26, Railway Station, Navi Mumbai Ma	Krishna Govind Tower, Opp. Sanpa Sector 24, Vashi, Sector 24, Turbh aharashtra	da ne Route Link			
		С	Johnson & Sor	IS		107, Janta Mark Maharashtra	et Rd, Sector 23, Turbhe Navi Mun	nbai Route Link			
		D				Vishnu Shankar	Kadam Marg, Thane, MH 400703	Route Link			
		E	Sans Pvt Ltd			Opposite Sanpa Navi Mumbai Ma	da Railway Station, Sector 18, Vasł aharashtra	ni			
										-	
62	Open										🖫 Save

Maplytics admin or System admin can add four more columns to the existing route table to view more details on the same. To do this, they can *go to Maplytics App > Settings > Entity maps > Entity map of respective entity > Advanced Settings > Route Email Configuration > Attributes > Select Attributes > Add.*

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Please use the belo	ow link to follow complete route:				
Show Complete Per	uto				
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Please use the belo Waypoint A	w link to follow individual routes: Name R. VLADIMIR CONSTANT & SONS	Address 262 at BETHEL AVENUE Staten Island NY 10307 USA	Annual Revenue \$1,000,000.00	Email charles10723@inogic.com	Navigation Route Link
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S maplytics.

Page **149** of **340**

Save Route:



Users can also save their route plotted. The route record will also save the information like number of waypoints, total distance and time for the route. User can add the route to an existing route or save the route with a name & owner as a new route.

Save The Route	×
O Add to existing route	
Create new route *	
Route today	
Select route date *	
2021-05-03	
Owner	
Select User/Team	
	Save

Open Saved Routes	^
Select Start Date *	
2021-04-27	iii
Select End Date *	
2021-05-01	
Search	

User can also update any route using the 'Update' button. User can search for routes existing in the required duration using the option of 'Open Saved Routes' and click on the 'Update' button for the required route.

Save Routes	X
roure - 21 april 4/21/2021 5:30 AM	Update
Meetings today - 27 April 4/27/2021 5:30 AM	Update

Clear Route:

The user can use the *Clear Route* button to clear the route from the map. This will just clear the route and directions card will still be opened for further use.



Unified view for Route and Records

While user plots the data and then creates a route, both the plotted data and the route will stay on the map for an easy Route Management. This makes it easy for the user to add more waypoints to the route and also update the route with the added waypoints.



Note: The route will remain on the map unless the user clicks on the 'Clear Route' button or closes the Directions Card

Default Origin and Destination

User can set default origin and destination for Route management. Go to Settings > Maplytics > Maplytics Configuration Details > Record of the user

1aplytics ap Configuration Details			
eneral Auto Schedulin	g Related		
Defaults			
Distance Unit	Mile	Region Area Unit	Square Meter
Map Mode	Road	Plot Data	Non Cluster
Optimize Direction	No	Along The Route Distance	
Live Traffic	No	Current Location	
Route Option	Shortest Time	Navigate In	Google
A Map Center		Records Per Page In Grid	50
Heat Map Type	Boundary	Zoom Level	
Summary Grouping	City	🛆 User	© 8
Default Template		Maplytics Security Template	
Set As Origin	Other	Set As Destination	Other
Other - Set As Origin	819 Catalpa Dr, Montgomery, AL 36112	Other - Set As Destination	819 Catalpa Dr, Montgomery, AL 3611

There are six options to select:

- User Mailing Address Reads address from User mailing address
- User Other Address Reads address from User other address
- Business unit Bill to Address Reads address from logged in user's Business units bill to address
- Business unit Ship to Address Reads address from logged in user's Business units ship to address
- None If user do not want to set default origin/destination
- Other: It will have its own multiline textbox associated where user can enter their own address

Note: If a user uses the "Plot route" button to plot a "Route" activity record on the Detail map, the Default origin/destination will not be set in the Direction card

Snap waypoint

This helps the user to edit a plotted route just by dragging the route to the required point on the map.



<u>Drag to a location</u>: User can drag a point on the route to a required location on the map. This will add the location as a waypoint at the dragged point in the route. This will also update the Directions card with the newly added waypoint.

<u>Drag to a pushpin</u>: User can also drag a point on the route to a pushpin plotted on the map. This will detect the record and add the record's location at the dragged point in the route. This will also update the Directions card with the newly added waypoint.

Note: The option of snapping waypoints is not available for a route create for trucks.



Along the Route

This feature provides the user the ability to search the records that fall in the defined proximity along the route. The default value for Along the Route search can be configured in the Maplytics Configuration record. This will find all the records with the defined search parameter and that falls in the entered proximity along the route.

Options	^
Miles	○ Kilometres
○ Shortest Time	Shortest Dista
Optimize Dire	Avoid Highways
Avoid Toll Roa	□ Traffic
🗹 Along The Ro	0.5 Miles

Note: The user can add the value between 0 - 25. The user can also add decimal values with a scale of 2 for the radius.





The Along the route records is also saved when the user saves the route. However, if the user has selected multiple Datasources on the Plot Card, only the first Entity and View combination in the Select Datasource will be saved for along the route search in the saved route.

If the user has plotted data on the map and opens a saved route that has along the route parameter saved as well:

- The user can either click on 'Confirm' to clear the plotted records and search along the route records with the Datasource saved in the route.
- Or, the user can click on 'Cancel' to search along the route records with the existing plotted data, ignoring the Datasource saved in the route.

If the user opens the Directions card directly without plotting the data or opens a saved route without the along the route parameter saved, they have the option to select the Datasource for the Along the route search directly on the Directions Card.



▼ Options	
Miles	○ Kilometres
Shortest Time	O Shortest Distance
Optimize Direction	Avoid Highways
Avoid Toll Roads	Traffic
🗹 Along The Route	5 Miles
Select Datasource	
Account 🔻 Select Vie	w v Q



Route Redirect and Copy Route Links

After plotting the route, user can use the 'Redirect' button to open the 'Navigation Links' popup on the browser as well as the Dynamics 365 App for Phones and Tablets.

The user can click on individual links for route navigation from point A - B, B - C, and so on. User can also select the application within the User Configuration record to navigate the route. Refer the section of 'Maplytics Configuration Details (Personalization)' in the installation manual to select the application. These links will redirect the route to the app selected in the configuration.

Navigation Links X For turn-by-turn navigation, please use the following links Image: Complete Route Show Complete Route Image: Complete Route From: 22 Depew PI, New York, NY 10309 Image: Complete Route To: 994 Arthur Kill Rd, New York, NY 10312 Image: Complete Route

From: 994 Arthur Kill Rd, New York, NY 10312 To: 2880 Victory Blvd, New York, NY 10314

From: 2880 Victory Blvd, New York, NY 10314 To: 218 Rosedale Ave, New York, NY 10312

Copy Links





Redirect with Google Maps

User can view the turn-by-turn navigations on Google Maps site on desktop and Google Maps App on Phones and Tablets. User can also choose to view the complete route.

Note:

- The maximum waypoints to show the complete route is 10 waypoints.
- By Default, the navigation will be redirected to Google Maps.

Redirect with Waze

User can view the turn-by-turn navigations on Waze site on desktop and Waze App on Phones and Tablets. This will show the navigation links from current location to the waypoints.

Note: The checkpoints should be under 3000 miles from the current location to view routes on Waze.

Redirect with Apple Maps

User can view the turn-by-turn navigations on Apple Maps on desktop and Apple Maps on iPhones and iPads. This will show the navigation links from current location to the waypoints.

Navigation Links

For turn-by-turn navigation, please use the following links

From: Current Location To: Ismael Tadao

From: Current Location To: Estela Gopaul

From: Current Location To: Mathilda He

From: Current Location To: Rachele Babaev

From: Current Location To: Vennie Tsitiridis

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S Copy Link

<u>Redirection on mobiles</u>: User can click on the route navigation buttons to redirect to the Google maps/Waze/ Apple Maps. The user can also use the 'Copy Links' button to copy the links to send them as an email or save it into a note.

Note:

- By default, the links will be redirected in Google Maps.
- The links redirect on the Dynamics 365 App for Phones and Tablet works with Dynamics 365 v9.x
- For other devices and Dynamics 365 v8.2, users can use the 'Copy Links' button.

Navigation Links	×
For turn-by-turn navigation, please use the following links	
From: South Brunswick Township, NJ To: 420 Swedeland Rd, Upper Merion Township, PA 19406	-
From: 420 Swedeland Rd, Upper Merion Township, PA 19406 To: Deakyneville Rd, Townsend, DE 19734	
From: Deakyneville Rd, Townsend, DE	



Print Route

User can print a Route as well as the adjoining Map. User can plot a route on map, click on the 'Print Route' button to print the route. It will also print the Driving Directions as well.





Clicking on the 'Print Route' button will open a new window with the map and Route on the page, which can be seen in the below screenshot. Click on the *Print Icon* to print the map and route instructions.



Proposed and Actual Route Tracking

With Route Tracking, an optimized route can be plotted for a field rep by the Manager. However, in certain situations, the actual route followed by the rep would be different from the plotted one. The rep could have taken an uncommon shortcut, he could have taken a different turn to avoid the highway traffic/accident sight, or may have rushed away in between to address a personal emergency. These actions would take him away from the plotted route and the same can be recorded.

The tracking of the actual route followed could help in analyzing the rep's productivity, the new shortcut if more optimized could be incorporated into the route for the next time, or could give insights about frequent congestion, accident-prone regions, etc.

<u>Enable Route Tracking</u>: User needs to enable the Real-Time tracking option for the route followed by the field user to be tracked.

Maplytics > Settings > Map Configuration Details > Real-Time Tracking

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۵ د	Maplytics - Unsaved Map Configuration Details												
\$	General Advance Setting	gs Check-In ArcGIS Auto Scheduling	Real-Time Tracking Related ~										
	Enable Real-Time Tracking Refresh Interval				Enable Real-Time tracking(Field Service)								
	(Seconds) Monday Tracking Start Time	2/1/2023	🗇 8:00 AM	٩	Monday Tracking End Time	2/1/2023		5:00 PM				©	
∞	Tuesday Tracking Start Time	2/1/2023	8:00 AM	٩	Tuesday Tracking End Time	2/1/2023	1	5:00 PM				٩	
•	Wednesday Tracking Start Time	2/1/2023	8:00 AM	٩	Wednesday Tracking End Time	2/1/2023		5:00 PM				٩	
8	Thursday Tracking Start Time	2/1/2023	8:00 AM	٩	Thursday Tracking End Time	2/1/2023	810	5:00 PM				٩	
	Friday Tracking Start Time	2/1/2023	8:00 AM	٩	Friday Tracking End Time	2/1/2023		5:00 PM				٩	
	Saturday Tracking Start Time				Saturday Tracking End Time		1						
	Sunday Tracking Start Time				Sunday Tracking End Time		hill						



<u>Start Mobile Tracking</u>: Within the Maplytics Mobile App, the user can start the tracking for estimated and actual route tracking.

View Tracked Route: The user can view the route plotted and followed with a few configuration setup.

Maplytics > Settings > Routes > Route Entity > Route Activity Waypoints

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Maplytics Dashboard	Route WayP	loints List								•°	
Entity Maps	Route Point	Route Options	Est Travel Distance	Est Travel Time	Start Time	End Time	Act Travel Distance	Actual Travel Time			
Maplytics Templates	A	11A-12B Kopra Road, Kharghar, Panvel, MH-410210, India							_		^
Maplytics Configurat	8	RBI Canteen Parampujya Shree Nirmala Devi Marg, Belapur, Thane, MH-400614, India	2.93 mile	8 minutes	2023-02-01 14:18:20+00:	0 2023-02-01 14:18:26+00:0	3.58 mile	18 minutes	⇒		
Maplytics Security Te	c	Late Gosavi Krushna Tandel Marg, Nerul, Thane, MH-400706, India	3.76 mile	15 minutes	2023-02-01 14:20:13+00:	0 2023-02-01 14:21:32+00:0	5.24 mile	23 minutes	⇒		
Territories	D	Sion Parvel Expressway, Turbhe, Thane, MH-400703, India	4.56 mile	13 minutes	2023-02-01 14:21:40+00:	0 2023-02-01 14:21:53+00:0	6.17 mile	30 minutes	⇒		
Assets	E	Radha Swami Satsangwas, 10 Sion Parvei Expressway, Vashi, Thane, MH-400703, India	1.27 mile	4 minutes	2023-02-01 14:21:57+00:	0 2023-02-01 14:22:06+00:0	2.54 mile	9 minutes	⇒		
ሻጃ ⁴ Teams	,	C/17 Late Masaheb Minatai Thakare Road, Nerul, Thane, MH-400706	4.22 mile	15 minutes	2023-02-01 14:22:09+00:	0 2023-02-01 14:22:17+00:0	6.43 mile	42 minutes	⇒		
Routes	6	Nimal Conservice Housing Society Visibi Thane MH-200703 India	1.96 mile	9 minutes	2023-02-01 14/22/24+00	0 2023-02-01 1#26/30+00:0	2.67 mile	1.4 minutes	⇒		
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Clicking on the Blue 'Navigate' Arrow opens up the Detail Map with the route for that particular travel.

Clicking the 'Show Full Route' button opens the Detail Map again with all the routes followed for all the waypoints for the Entity.



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License Registration																	





Route to a record

Users can add the 'Route to a Record' tab to any entity to view the route plotted to a record's location from their current location automatically. If user needs to meet any client, they can open the client's record, go to this tab and view the route to reach the client's location directly. Further, they can click on

the Navigation button V to navigate themselves with the turn-by-turn directions. They can also use the map to perform other Maplytics actions like Along the route, plotting more records etc.

User's location will be represented by 'A' in map, while the record's location will be denoted by 'B'.



Steps to add 'Route to a Record' tab to an entity form:

Go to Settings > Advance Settings > Customize the system > Entities > Account > Main Form > Add a tab. Here we have taken Accounts form for an instance.

Now select the tab and click on Insert > Add Web Resource (ikl_/Maplytics/Maplytics.DetailMap.html) The recommended number of rows in formatting is minimum 10.

Modify this Web reso	ce Properties ource's properties.	?	
General Formatting	Dependencies		
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Restrict cro	oss-frame scripting, where supported,	=	

Auto Scheduling

Auto Scheduling helps users to create an optimized schedule to be followed on the field over a span of days by the concerned field professionals. The user can perform Auto scheduling on the required set of records (e.g., clients) to create Appointments and optimized routes, with the considerations of existing appointments, the preferred days of working, different meeting durations, availability of the selected users etc. This feature will help user to create appointments and optimized routes based on shortest time in order to provide an effective plan, hence saving the time and increasing the field productivity.

Users can contact at <u>crm@inogic.com</u> to get the access of the feature and they will be provided with a Maplytics license with Auto Scheduling enabled into it.

Note: The visibility of the option of 'Auto scheduling' into Mass Actions will be based on the Maplytics Security Template if any assigned to the user. Please refer to the section of 'Maplytics Security Template'.

To perform Auto Scheduling user can go to the Mass Actions within the View Data grid. They can plot the Entity records on the map that are needed to be visited and open the 'view data' grid at the bottom to check the number of records plotted on the map and deselect the records that are not required.



Note: Auto Scheduling can be performed on a maximum of 100 records plotted on the map

After plotting the required records to be scheduled for, user can *Go to Mass actions > Auto scheduling*. This will consider all the records that are plotted on the map and will proceed to the Auto Scheduling page.

Auto scheduling card

User can set the basic preferences as per the requirement so as to consider the same while creating a schedule. Users can also have these prefilled by setting default values for the preferences within their Configuration Detail Record. Please refer 'Configuration Detail Record' section Installation Manual to see

Consi	ider Existir	ng Meet	tings	
Schedule Star	t Date *			
01/06/2023				
Select Users *				
C Reso	urce			
Brian L				×
Missy L				×
Period *				
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Break Duratio	n *			
60 Minutes				~
Buffer Time *				
10 Minutes				~
Working Davs	*			
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configuration for Auto Scheduling.

Consider Existing meetings: Select this option to consider existing meetings saved in CRM assigned to the selected users.

Select users: Select the Maplytics user(s) to create Automated schedule for them. A maximum of 10 users can be selected to create an automated schedule.

Period: The number of days the schedule should be for. The meetings will be distributed among the number of days selected here. User can choose any one option from the following:

- 1 Day
- 2 Days
- 3 Days
- 4 Days
- 5 Days
- 1 Week
- 2 Weeks
- 3 Weeks
- 1 Month

Duration: The time frame required for each meeting. User can choose any one of the following options. User can also change duration for individual meetings in Advanced Preferences. User can further change the duration of individual meetings in the 'Advanced Preferences'.

- 1 Minute
- 5 Minutes
- 10 Minutes
- 15 Minutes
- 20 Minutes
- 30 Minutes •
- 45 Minutes
- 60 Minutes
- 75 Minutes
- 90 Minutes
- 120 Minutes

Start Time: Time to start the schedule of each day. User can enter the time in 12-hour format (hh:mm)



<u>End Time</u>: Time to end the schedule of each day. User can enter the time in 12-hour format (hh:mm) <u>Break Time</u>: Starting time of Break for each day. User can enter the time in 12-hour format (hh:mm) Break Duration: Duration of the break during each day. User can select any one of the following options:

- 0 Minutes
- 5 Minutes
- 10 Minutes
- 15 Minutes
- 20 Minutes
- 30 Minutes
- 45 Minutes
- 60 Minutes
- 75 Minutes
- 90 Minutes
- 120 Minutes

<u>Buffer time</u>: User can add extra time to the schedule as buffer to be used in case of unforeseen situations to avoid changing the schedule.

- 0 Minute
- 5 Minutes
- 10 Minutes
- 15 Minutes
- 20 Minutes
- 30 Minutes

<u>Working days</u>: User can select the days for which the selected users will be working. The meetings will be distributed only within the working days selected here. User can select any day between Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. *At least one day should be selected*.

Note:

- If the logged-in user has set default values for the preferences in the respective Maplytics Configuration detail record, while opening the Auto scheduling section, the preferences will get prefilled with the same.
- If the logged-in user selects any other single user, the preferences will get prefilled if there are default values set in the Maplytics Configuration detail record of the respective selected user.
- If the logged-in user selects multiple users, the preferences will get prefilled if there are default values set in the Default Configuration detail record.



Advanced Preferences

User can further click on 'Advanced preferences' within the Auto Scheduling card to select further preferences to be considered while creating an automated schedule.

Buff	er Tin	ne 📍					
10 Minutes 🗸							
Wor	king [Days	•				
	✓	✓	~	✓	✓		
Su	Мо	Tu	We	Th	Fr	Sa	
Ac	lvance	ed Pre	efere				Proceed

<u>Meetings Per Day</u>: User can select the average meetings that should be scheduled for a day. A minimum of 1 and a maximum of 20 meetings can be selected.

<u>Continuous Schedule</u>: Instead of starting the route from the origin every day, if the route should be started on the ending location of the previous day, user can set it as 'Yes'. For example: A user starts the first day from Brookwood in Alabama, USA to follow the route assigned and reaches Alexander city, Alabama which is the destination of the route for the day. Now, if the 'Continuous Schedule' is enabled, the user does not need to go all the way to Brookwood to start the route for the next day, instead the user can directly go to the first appointment scheduled for the second day, from Alexander City itself.

<u>Reschedule Existing Meetings</u>: If the option of 'Consider Existing Meetings' has been selected within the Auto scheduling card, then the option of enabling 'Reschedule Existing Meetings' will be available. User can select 'Yes' in order to reschedule existing meetings. This might change the respective owners as well to get the highest optimization. If the existing meetings are needed to be met at the set appointment time, the user should select 'No'.

Note: If both Onsite and Offsite existing meetings have been considered, then, enabling reschedule existing meetings will make changes only to the Onsite meetings.

Update Address	×
Origin *	
221 Brighton Ave, Staten Island, NY 10301, United St	3
Destination	
445 Castleton Ave, Staten Island, NY 10301, United S	31
OK	

User Details

Selected users will be listed here along with the space provided for the Origin and Destination locations for the same. If the default locations for Origin and Destination are set in the default configuration details of the users, the same will be prefilled here. If not, then user can click on 'Edit' and enter the required locations for Origin and Destination for the respective users. Location for Origin will be mandatory here.

User can also uncheck any users in this list if they do not want to create an automated schedule for any user.

elect	ted Users			
✓	User	Origin	Destination	
✓	Brian L	221 Brighton Ave, Staten	445 Castleton Ave, State	Edit
	Missy L	6581 Hylan Blvd, Staten I	48-182 Torrice Loop, Stat	Edit
 Image: A start of the start of	Olli L	345 Cole St, Staten Islan	106 Alverson Ave, Staten	Edit

Meeting Details

The details of the records selected to create the schedule will be listed here. Users can also deselect any record if they do not want to add the record to be considered while creating the schedule.

✓	Duration(N	Account Name	Main Ph	one	Address 1: City	Primary Contact	Email	
~	30	I. SANDI HAC	337504	90760	Staten Island			
~	30	K. FRANK QU	2446613	39806	Staten Island			
~	30	L. DANIEL O'	377375	19342	Staten Island			
✓	30	N. ADRIAN FI	1277070	00146	Staten Island			
~	30	N. JOHN BRE	1902526	68787	Staten Island			
 Image: A start of the start of	30	N. NORMAN	1675826	68417	Staten Island			
 Image: A start of the start of	30	N. NYRON H	264013	56824	Staten Island			E

User can also click on the individual duration of meetings to change it for the respective meetings as well as enter a value in the blank space to filter the data based on the entered value. In the below screenshots the data has been filtered by meetings with the duration of 30 minutes and city Staten Island. User can filter the data for with the values for other columns as well.

U	ser Details	Meeting E	Details	Exis	sting Meetings			3
	Duration(N	Account Name	Main Pho	ne	Address 1: City	Primary Contact	Email	
	30				Staten Island			
 Image: A start of the start of	30	N. ADRIAN F	12770700	0146	Staten Island			4
	30	N. JOHN BR	19025268	3787	Staten Island			

Existing meetings

If user has selected 'Consider Existing Meetings' in the Auto Scheduling card, the Appointments, Bookable resource bookings etc. saved in CRM owned by the selected users will be listed here. User can also change the Meeting type of Onsite meetings to Offsite. They can further deselect the listed meetings or Activities they do not want to consider and also filter the meetings based on specified values. User can choose one among the options under 'Select Meeting', i.e. All Meetings, Appointments, Service activities or Bookable resource bookings to view the same in the list below that. Admins can also select the Activities within the Default Configuration Detail records that are needed to be considered here while Considering Existing Meetings.

Selec	t Meeting	1							
All	e weeting		~]					
~	Subject/	Regardir	Owner	Resourc	Start Time	End Time	Duration	Activity	I Meeting
~	Pho	N. A	Brian L		2023/01/09 10	2023/01/09 10		Pho	Offsite
✓	Арр	Test	Brian L		2023/01/09 1:	2023/01/09 3:	90	Арр	Onsite
✓	Арр	Test	Brian L		2023/01/09 3:	2023/01/09 4:	90	Арр	Onsite
✓	Арр	Test	Brian L		2023/01/10 1:	2023/01/10 3:	90	Арр	Onsite
	Арр	Test	Brian L		2023/01/10 3:	2023/01/10 4:	90	Арр	Ons 🗸

Once the User clicks on 'Proceed' a route based on user/resource selected will get planned and a schedule will be displayed on the calendar along with the plotted routes on map and a trip summary will get displayed for first day schedule.

Consider a field rep, Mark, representing a pharmaceutical brand utilizing the schedule for his business trip. An Auto-Scheduling Calendar along with a Trip Summary Panel and a map with the travel route on it makes understanding the planned schedule easier for him. The resource legend is maintained the same for the route, the meeting details, and the trip summary. This makes visualization quick, especially for the users on the go. Mark can also get a quick access to the navigation directions and be aware of his next destination, in advance. He has the knowledge of the total distance he would be traveling in a day or every day for a week and also the total time of this travel. Overall, Mark will be better equipped with a proper plan, directions, and be punctual for the meetings.



Maplytics[™] – User Manual EZ X Maplytics - Detail Map Auto Scheduling 78 > Trip Summary : January 16th 2023 3 Meeting(s): 16 min (3.19 mi) Bayonne Roselle Elizabeth From 53 Penbroke Ave, Staten Island, NY (Missy L 53 Penbroke Ave, Staten Westfield 10301, United States Island, NY 10301, United States To R. AMADOR PONS & SONS: 256 at N. STEPHEN DIGIUSEPPI & SONS: 29 at BROOKS POND PLACE Staten Island NY 10310 USA Bahway 8 MORRISON AVE Staten Island NY 1031... d Day . 4 1 1/16/2023 7 min (1.38 mi) d Mon 1/16 Rahway From <u>R. AMADOR PONS & SONS</u>: 256 at MORRISON AVE Staten Island NY... IRWAY LANE Staten Island NY 10301 USA 8 8.00 AM nfield Staten Island To <u>S. CHARLES JOHNSON III & SONS</u>: 35 at FAIRWAY LANE Staten Island NY... C 5 min (0.99 mi) 9:00 AN Great Kills From S. CHARLES JOHNSON III & SONS asant Plains Ave, Staten C 10-50 AM 35 at FAIRWAY LANE Staten Island NY.. Island, New York 10309, United States To N. STEPHEN DIGIUSEPPI & SONS: 29 at BROOKS POND PLACE Staten Island... 10:00 AM 0 3 min (0.82 mi) ര R. ROGER TAN & SONS: 78 at CARTERET 11:00 AM N. STEPHEN DIGIUSEPPI & SONS(11:09 AM - 12:24 PM) STREET Staten Island NY 10307 USA 12:00 PM Sayreville Missy L Union Beach Brian L Madison Park Keansburg Keyport Sandy Hook Ba Matawan New Monmouth Old Bridge 2 miles Middletown Spotswood © 2022 TomTom, © 2023 Microsoft Corporation Terms South Brunswick

Auto-Scheduling Calendar-

The Auto-Scheduling Calendar on the left shows the schedule for the day/week of different users. Each individual user can be selected and an optimized schedule for them will be displayed. The meeting details as well as the allotted time slots can be viewed. The user can choose from the drop-down option available on the tool bar of the Calendar panel and view the schedule for day/week. An optimized route corresponding to the schedule in the calendar is plotted over the map. Every user is automatically assigned a specific route legend and the route is displayed in user specific colors for easy readability.





Though the map has routes plotted for all the users in the calendar, the route for the user currently selected is zoomed in the map view.



In case of display being selected for weeks, the scheduling calendar shows all the meetings and their timeslots for all the days of the week. The days with no meetings are blank. All the days of the week and

the routes on the map follow the route legend. The optimized routes for all the meetings of the week can be seen on the map and the route legend aids in day-to-day differentiation.





Trip Summary-

The Trip Summary panel on the right shows the scheduled meetings for the day for the selected user It includes information about the origin and destination. The destination is assigned to the record that is hosting the meeting.

For instance, if the first meeting starting at 8 AM requires the user to start from his office, the office location (A) would become the origin and the meeting location (B) would be the destination. For the next meeting, the first meeting location (B) would then become the origin and the next meeting location (C) would be the destination. This pattern continues throughout for all the scheduled meetings.

The total number of meetings of the day, total time taken to travel to each of those meetings and all the meetings of the day, the total distance traveled for individual meetings and all the meetings scheduled is all shown on this panel.

The origin and the destination of the multiple meetings are denoted by alphabets which are referenced on the route map as well. In case of a day's view, the route legend at the bottom shows the color codes for different users.

Trip	Sun	nmary : January 16th 2023
() ()	Fror at Co To M GER 21 m	n L. DANIEL O'CONNOR & SONS: 33 OLLEGE AVENUE Staten Island NY I. NORMAN LOK & SONS: 78 at ARD STREET Staten Island NY 1030 in (13.84 mi)
		Head east on College Ave toward Brookside Ave
0.07	mi	Bear right onto Brookside Ave, then immediately bear left onto Martling Ave
0.08	mi	
0.74	mi	Turn right onto Slosson Ave
		Turn right onto N Gannon Ave toward Goethals Brg / Staten Island Expy W
0.07	mi	Take the ramp on the left for I-278 West
Mis	sy L	

Turn-by-turn navigation directions can be seen when clicked on the down arrow below a meeting slot.



In case of display being selected for a week, the trip summary is displayed for the first scheduled day. The route legend for the next scheduled days of the week is shown at the bottom. When the user manually clicks on the next scheduled day of the week in the calendar, the corresponding trip summary of that scheduled day is seen with total travel time and distance for the selected user.

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Note: A change in the Entity Map shall reflect a change in the Title Attribute given to the destination



Calendar Navigation Buttons

Auto Sch	neduling Calendar	
Brian L	•	
< >	1/1/2023 - 1/7/2023	Week *

Users can use the Next- Previous calendar navigation buttons to view the schedule for the next day of the week for a user. The same buttons can be used to see the schedule for the next week in case the weekly schedule is being viewed.

Users can scroll through the meetings of the day displayed in the Scheduling calendar with the scroll bar at the side. They can use the scroll bar at the bottom to scroll thought all the meetings of the week while viewing a weekly display.



Create Activities

User can save the schedule as Routes and Activities in the Dynamics 365 using 'Create' button. The user can create the following activities:

- Appointments
- Service Activities
- Bookable Resource Bookings

User can also select the option of 'Create Route(s)' in order to save the planned routes into 'Route' Activity Entity.

Create Activities	×	Create Activities	
Select Activity *		Select Activity *	
Geleci Activity	_	Bookable Resource Booking	
Appointment		Name	
Subject *		New Clients	
Meetings		Schedule Start Date *	
		2020-09-21	
Schedule Start Time *		Schedule End Time *	
2020-08-20		2020-09-22	
Schedule End Time *		Booking Status *	
		In Progress	
2020-08-21		Booking Status *	
Priority		In Progress	
High		Booking Type *	
		Liquid V	
Create Route(s)	Create		

Note: To make the option of Bookable resource booking visible, user needs to enable the OOB or any custom entity to create the bookable resource bookings.



Go to Detail Map: Using this button, user can go back to the Detail map

Note: All the scheduled data will be cleared, if 'Go to Detail Map' button will be used. To save the schedule created, user can use the option of 'Create activities'.

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Configuration Details for 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

eral Advance Sett	ings Check-In ArcGIS	Auto Scheduling	Real-Time Tracking	Related \vee
Start Time	8:00 AM		End Time	5:00 AM
Period	3 Day		Duration	75 Minutes
Break	1:00 PM		Break Duration	60 Minutes
Buffer Time	15 Minutes		Round Time	No
Schedule Existing Meetings			Schedule first activity at start time	

neral Advance	e Settings Check-In Arco	GIS Auto Scheduling	Real-Time Tracking	Related \checkmark
Working Days				
Mon			Tue	
Wed			Thu	
Fri			Sat	
Sun				

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.

eneral Advance Settings	Check-In ArcGIS	Auto Scheduling Rea	al-Time Tracking Related ~	, ,	
Auto Schedule Activities Confi	guration				
Select Entity		Entity Name	Entity View	Remove	
Select Entity		Phone Call	All Phone Calls	×	-
Select View		Task	All Tasks	×	
•		Appointment	All Appointments	×	

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*

Auto Scheduling Real-Time Tracking 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 Round Time No	laplytics - Saved ap Configuration Details			
Start Time8:00 AMEnd Time7:00 PMPeriod5 DayDuration60 MinutesBreak1:00 PMBreak Duration30 MinutesBuffer Time15 MinutesRound TimeNo	eneral Auto Schedulir	ng Real-Time Tracking Relate	ed \vee	
Period5 DayDuration60 MinutesBreak1:00 PMBreak Duration30 MinutesBuffer Time15 MinutesRound TimeNo	Start Time	8:00 AM	End Time	7:00 PM
Break1:00 PMBreak Duration30 MinutesBuffer Time15 MinutesRound TimeNo	Period	5 Day	Duration	60 Minutes
Buffer Time 15 Minutes Round Time No	Break	1:00 PM	Break Duration	30 Minutes
	Buffer Time	15 Minutes	Round Time	No


	Maplytics™ – User Manual						
Maplyti Map Confi	Maplytics - Saved Map Configuration Details						
General	Auto Scheduling	Real-Time Tracking	Related \checkmark				
Working	Days						
Mon			Tue				
Wed			Thu				
Fri			Sat				
Sun							

Note: Create Activities for Custom Entity:

• A custom entity should be linked to any OOB Entity into Entity Maps in order to Create Activities for the Entity



Check-In/Check-Out

Check-In feature enables users (sales person/service person) to register their arrival and departure time for the meeting locations while navigating on field with the help of Check-In and Check-Out buttons. These buttons will help to tag the geo-coordinates of the location while a user is visiting a client. This will also help the management to track the activities of the field professionals as well as the time they have spent on every meeting.

Configuration

To get started with the feature of Check-In, the first step is to configure Maplytics. Configuration will create the Entity Map for the Check-In entity. Please refer to the section of '*Configure*' under the '*Initial Setup - Maplytics License Activation, Configuration for Entity Map, Dashboards and Census data*' within the Installation manual.

This feature can be enabled for any OOB or custom entity within their respective Entity Maps. To enable this, System Admin/Maplytics Admin can follow the steps mentioned below. The following screenshot shows the entity map of Appointment for an instance.

Go to Maplytics App > Settings > Entity Maps > Open Required Entity Map > General Tab > Enable Check-In > Set the value to 'Yes' & click on 'Save'.

appointment					
General Attribute Mapp	ings Tooltip Mapping	Category Configuration	Configuration Adva	nce Settings Related	
Entity Name *	Appointment		Link To	Regarding	
凸 Total Records	22				
🔒 Geocoded Records	22		A Enable Check-In	Yes	

Note:

- The default value for 'Enable Check-In' is set to 'No'.
- User cannot undo this option, once selected and saved.
- After enabling this feature, please wait for a while before using this.

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Related records for Check-In/Check-Out

User can use the feature of 'Plot Related Records' to view the related records (Appointments, Accounts, etc.) for Check-In/Check-Out records that are plotted records on the map. using. This will help the managers to understand for which record has the sales person/service person checked-in/out. To plot related records for Check-In/Check-Out, user needs to select the relationship. To select the relationships, admins can follow the steps mentioned below. We have provided the steps for Appointments for an instance.

Go to Maplytics App > Settings > Entity Maps > Required Entity Maps record > Configuration > Related Records Configuration > Relationship List > Select appointment - ikl_checkinentity

User can also refer to the section of 'Related Record Configuration' under the Entity Maps within the Installation manual for the same.

Note: User needs to select the respective Relationship with Check-in for every entity within their respective entity maps for which they want to see the related Check-In/Check-Out records.



Check-Out

After enabling the feature, user can also enable the option of 'Check-Out'. This way the user can first click on the Check-In button while visiting the meeting and then can click on the Check-Out button while completing the meeting. Here, as the geo-coordinates for both the locations will be saved, it will also help the management to track the time spent on the meetings.

In order to enable Check- Out, System Admin/Maplytics Admin can follow the steps mentioned below:

Go to Maplytics App > Settings > Map Configuration Details > Default Configuration Detail Record (the one with no user name) > Check-In tab > Set the value for Enable Check-Out to 'Yes' & click on 'Save'.

	MAP CONFIGURATION Maplytics	DN DETAILS
Ger	neral Advance Setting	s Check-In Auto Scheduling Related
	Enable Check-Out	Yes
	Default Radius	0.20
	Geofencing	No

Note:

- The default value for 'Enable Check-Out' is set to 'No'.
- User can anytime disable this option.
- Check-Out option can only be enabled for entities for which the feature of Check-In has been enabled.
- Check-Out can be enabled/disabled only at Organization level.
- Check-Out button will only be available for the records for which the user has checked-in.

Default Radius

It is the distance that the System admin/Maplytics admin can set to consider the accuracy of the Check-In/Check-Out records created by the field professionals. If the Check-In/Check-Out record do not lie within this radius then it will be considered as invalid record and will be shown with a pushpin with this Red

Cross. For example: 🗳

	MAP CONFIGURATIO	N DETAILS
Ger	neral Advance Setting	S Check-In Auto Scheduling Related
	Enable Check-Out	Yes
	Default Radius	0.20
	Geofencing	No

Note: By default, Geofence radius is 0.20 kilometers or miles depending on the unit set in User Configuration Detail record.



Geofencing

Geofencing is creating a virtual geographical boundary of a specified Geofence radius around a record. If Geofencing is enabled, user needs to be within this radius to successfully Check-In/Check-Out for a record. If the user is not within this radius, the user will not be able to Check-In/Check-Out and will be shown a message specifying that they need to be within 'n' Km/Mi of distance from the Check-In/Check-Out location. This will help the management to have only valid Check-In and Check-Out records done by the field professionals.

In order to enable Geofencing, System Admin/Maplytics Admin can follow the steps mentioned below:

Go to Settings > Map Configuration Details > Default Configuration Detail Record > Check-In tab > Geofencing > Set the value for Geofencing as 'Yes'

M a	Maplytics Map Configuration Details					
Ge	neral Advance Settings	S Check-In Auto Scheduling				
	Geofencing	Yes				
	Geofence Radius	0.20				
	Allow to create pending Checkin/Checkout					

Geofence Radius

After enabling Geofencing, System Admin/Maplytics Admin can set the default value for Geofence radius, which will be considered while a user Checks-In, or Checks-Out.

Note:

- By default, Geofencing is disabled in which case the user can Check-In/Check-out from any location.
- By default, Geofence radius is 0.20 kilometers or miles depending on the unit set in User configuration Detail record.



Enable Notes on Check-In and Check-out

Admins can enable this option to let the users add notes to the record for which they are checking in/out. To enable this option, *go to Map Configuration Details > Default Configuration Detail Record > Check-In tab > Enable Notes on Check-In / Enable Notes on Check-Out*.

The admins will have three options to select:

- Disable: This will disable the option to add notes while Checking-In or Checking-out.
- **Optional:** The user is shown the pop up for notes but they can check-in or check-out without adding the notes.
- Mandatory: It is necessary for the user to add notes while checking-in or checking-out.

Allow to create Lenable Notes on Checkout Checkin/Checkout Checkin Che	Yes	Enable CheckOut	No	Geofencing
Checkin/Checkout Enable Notes on Disable Default Radius 0.20 Checkin Optional Reasons for Requests	Select	Enable Notes on Checkout		Allow to create pending
Reasons for Requests Mandatory	Disable Optional	Enable Notes on Checkin	0.20	Checkin/Checkout Default Radius
	 Mandatory	Reasons for Requests		

Pending Check-In/Check-Out Requests

System Admins and Maplytics Admin can enable this option to allow the users to create the requests for Check-in/Check-out for meetings in the past. For example, if a user had an offsite meeting or missed to check-in/out for any meeting, they will be able to create requests for check-in/out for such meetings if this option is enabled.

To enable it, go to Map Configuration Details > Default Configuration Detail Record > Check-In> Create pending Check-In/Check-Out Requests > Select the checkbox



aplytics p Configuration Detail	s		
eneral Advance Set	ttings Check-In Auto S	icheduling Real-Time Tracking Related	
Geofencing	No	Enable CheckOut	Yes
Allow to create pending	•	Enable Notes on Checkout	
Checkin/Checkout	Yes 0.20	Enable Notes on Checkin	
		Reasons for Reques	sts

Note: Any user who would be inside the defined Default Radius/Geofence radius of a record will not be able to create pending check-in or check-out for the respective record.

Once this option is enabled, the admins can also see the 'Reasons for Requests' which shows the list of acceptable reasons that are predefined. The users can select anyone while creating pending Check-In/Out records. The admins can also configure custom Request Reasons by going to Check-in Entity within CRM Customizations.

neral Advance Sett	ings Check-In Auto Scheduling	Real-Time Tracking Related		
Geofencing	No	Enable CheckOut	Yes	
Allow to create pending		Enable Notes on Checkout		
Checkin/Checkout Default Radius	0.20	Enable Notes on Checkin		
		Reasons for Requests	Select	`
			Select Unable to find the gps location Network issue Forgot to Check in/out on field Meeting on off-site location Other	

Creating Check-In/Check-Out records

While navigating on field, user can Check-In and Check-Out for any record. This can be done in the following two ways:

• <u>From Record Form</u>: User can open the respective record (Appointments, Accounts etc.) and click on Check-In/Check-Out button on the ribbon.

٥	🖬 Save	✓ Mark Complete	🖔 Refresh	😚 Map	🙆 Check-In	imes Close Appointment	🖯 Pro	ocess 🗸	🖁 Convert To 🚿	\checkmark \bigcirc Recurrence	
An	Appoi App	ntment: Appointment ointment for Ir Tab Related	∨ isurance P	an B3					Priority Normal		\sim
	Required	A	dventure Work	s Electronic	s						
	Optional										
	Subject	* Арро	intment for Ins	irance Plan	B3						
-	Location										
	Regarding	A 15	dventure Work	s Electronic	S						

🗟 Save 🧹 Mark Com	iplete 🖒 Refresh	😵 Map 🔘 Check-Out	imes Close Appointment	Process	✓ 📱 Convert To 🗸	$\mathcal C$ Recurrence	
Appointment: Appointm	Appointment ∨ Nent for Insuran	ce Plan B3			Priority Normal		\sim
Appointment Tab	Related	Works Electronics					
Optional							
Subject Location	* Appointment	for Insurance Plan B3					
Regarding	Adventure	Works Electronics					

Appointment: Appointm V Appointment for Insurance Pl		Appointment: Appointm V Appointment for Insurance PI	
 Mark Complete 		 Mark Complete 	
🖔 Refresh		🖒 Refresh	
😵 Мар		😵 Мар	
Oreck-Out		O Check-In	
imes Close Appointment		× Close Appointment	
B Process	>	B⊋ Process)
H Convert To	>	E Convert To)
\mathcal{C} Recurrence		\mathcal{C} Recurrence	
🗎 Delete		🛍 Delete	
ත Email a Link		🖾 Email a Link	
Adventure Works Electronics		Adventure Works Electronics	2
Optional		Optional	
	Q		Ç
Subject	*	Subject	
Appointment for Insurance Plan B3		Appointment for Insurance Plan B3	
	3		

Note:

- User needs to allow to read the GPS location of the device in order to Check-In/Check-Out.
- Once checked-in, user can click on the same button to check-out.
- <u>Through Detail Map</u>: User can click on any plotted records (Appointments, Accounts etc.) to open the respective Tooltip Card and click on the button to Check-In/Check-Out.

★ AMC Discussion ×	★ AMC Discussion ×
→ DIRECTION → SET AS CU → SET AS P	→ DIRECTION → SET AS CU → SET AS P
340 228 Ave. NE Sammamish WA 98074 USA	340 228 Ave. NE Sammamish WA 98074 USA
Subject: AMC Discussion	Subject: AMC Discussion
Regarding: Trey Research Assembly	Regarding: Trey Research Assembly
Priority: High	Priority: High
Start Time: 18-07-2019 15:10	Start Time: 18-07-2019 15:10
End Time: 18-07-2019 15:10	End Time: 18-07-2019 15:10
Appointment Type: Not Recurring	Appointment Type: Not Recurring
Take An Action	Take An Action
Check-In	Check-Out

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Note: Multiple Check-In/Check-Out records can be created for any record (Appointments, Accounts, etc.)

Adding Notes while checking-in/out

While a user registers a check-in/out, they can add some notes or attachment for the respective record. For example, if they want to add some notes related to the meeting they did, or any documents they need to attach regarding the requirements of the client, they can use this option to add the notes or attachment.

Users can further go to the respective record to see the notes and attachments within the timeline of the Activities. If a user is checking-in/out for an activity record like appointments or Bookable resource bookings and has added notes or attachments then in such cases the notes and attachments will be saved within the respective related record (for example, Account/work order) saved in the regarding field.



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Creating Pending Check-In/Check-Out requests

If users want to check-in or check-out for a record for which the meeting/service has been done in the past but they missed to check-in/out at that time, because of an off-site meeting or let's say if they forgot to checkin/out, so they can create check-in/out requests for those records later sometime. They can select the reason why they missed and select the date & time of the meeting for which they missed to check-in/out and click on 'Create'. The requests will be pending for approval from managers. Unless the records have been approved by the manager, the records will not become active check-in/out records and will remain as pending check-in/our requests.

Check-li	n 🔉
Select Attachment	
Choose file No file chose	en
Supported file type: .xlsx, .txt, .xml, .p .docx, .pdf, and .ods	ng, .jpeg, .jpg, .svg,
Check-In Time *	
2021-03-23 05:30:00 PN	©
Reason *	
Other	~
Had a family emergency	
	/
	Create
	Create

Add Notes Here	·	
Select Attachmer	at	
Choose file	No file chosen	
Supported file type:	.xlsx, .bxt, .xml, .png, .jpeg,	.jpg, .svg,
.docx, .pdi, and .ods	5	
Check-In Time *		
2021-03-23 05	:30:00 PN 🗰 🖸	
Reason *		
Reason * Meeting on off-s	ite location	
Reason * Meeting on off-s	vite location	

Check-Ir

If the user wants to enter a reason which is not listed then the user can select the 'Other' option and enter their reason in the provided text box and click on Create. These check-in/out requests will be converted to an active check-in/out record only when the respective manager approves the reason for missing the check-in/out and hence approves it to be a valid check-in/out records.

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Visualize Check-In/Check-Out records on Detail Map

The managers can visualize the activities of field professionals by plotting the Check-In/Check-Out records on the map just like any other entities with the help of the Plot Card. User can select 'Check-In' as the Datasource and select a required view to visualize the records from that view.





Analyze Check-In/Check-Out records

After plotting the records for Check-In and Check-Out, user can analyze the pushpins by distinguishing between the following two kinds of pushpins:

- Valid Check-In/Check-Out: When a user Checks-In/Checks-Out within the Default Radius or
 - Geofence Radius, it is a valid record and will be represented by $^{
 earrow}$ pushpin.
- Invalid Check-In/Check-Out: When a user Checks-In/Checks-Out outside the Default Radius it is represented by pushpin.

Visualizing Related Records

After plotting the records for Check-in, user can also choose to view the records (Appointments, Accounts etc.) against which the plotted check-ins and check-outs were created.

Visualizing Related Record (Appointments/Accounts, etc.) for Check-In/Check-Out records

After selecting the relationship, user can choose to view the related record for any Check-in and Checkout record plotted on the map.



The related record can be visualized in the following two ways:

• By Contextual Menu: User can right click on any Check-In/Check-Out pushpin to open the 'Contextual menu' and click on 'Show Related Record'. This will plot the related record for the selected pushpin. To hide the related record, user can again right click on the same Check-In/Check-Out pushpin to open 'Contextual Menu' and click on 'Hide Related Record'.





• By Tooltip Card: User can click on the Check-In/Check-Out pushpin to open the Tooltip Card and click on 'Show Related Record' from the 'Tooltip Card Actions'. To hide the related record, user can again click on same Check-In/Check-Out pushpin to open the Tooltip Card and click on 'Hide Related Record'.

\star account-City Power & Light $ imes$
→ DIRECTION → SET AS CU → SET AS P
D-16/2, Sanpada Midc Road Navi Mumbai MH
Name: account-City Power & Light Integration
Owner: Sam K
User Latitude: 47.66669
User Longitude: -122.19854
Created On: 18-07-2019 11:54
account: City Power & Light Integration
Take An Action
Show Related Record

Visualizing related Check-in/Check-Out records for plotted records (Appointments, Accounts, etc.)

After selecting the relationship for the required entity within the entity map as suggested above, user can click on any plotted record to open the Tooltip card and click on 'Plot related record' to plot the related Check-In/Check-Out records.







Visualize Pending Check-in/out requests

Managers can select the required view for the Check-in/out requests and plot the same on the map in order to visualize the pushpins.



Approve/Reject pending Check-In/Check-Out records

Once the manager has plotted the pending check-in/out request records on the map as shown above, they can check the request records created by field team and approve or reject the records in order to accept it as an active check-in/out record or reject it.

If manager needs to approve/reject the requests from a particular salesperson, they can also select 'Owner' within the 'Category' in the 'Plot Records' card to categorize the request records with Owners. Manager can further go to the category card to deselect the other owners so as to visualize only the records created by salesperson who reports to them.



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Manager can also use the option of Approve/Reject from the Mass Actions to approve or reject all the pending check-in/out request records plotted on the map.

Now, manager can click on a pushpin from the map and to the see the Approve/Reject button. Admins can also **go to Maplytics App > Settings > Entity map > Check-in entity map > Tooltip Mappings > Add Request reason**. This will show the Reason for request on the tooltip card while a manager clicks on a pending check-in/out. After checking the reason, manager can decide and click on the button to open the window and select Approve or Reject and click on save.





Note:

- Only the system Admin, Maplytics Admin, or the Manager of a user can approve or reject the respective pending check-in or check-out records.
- Once the manger/admin approves/rejects a record, they cannot approve/reject the same record again.



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Land Area Mapping

If users work with lands, real estates or farms etc. they can visualize their lands on map with this feature. Users will be able to assign land regions to the records and visualize them on the map to understand the coverage of area for each of the records using this feature.



Create and Assign land areas to entity records

Create 1: N relationship with Geography entity

User first needs to assign the land regions (Geographies) to the records of the CRM entity for which the lands are to be visualized. For this, the user needs to create 1: N relationship between that entity and the Geography entity. For example, if the user wants to visualize the landscapes for Account records, so to create a 1: N relationship between the Accounts entity and the Geography entity. User can also add a grid on the Accounts form in order to see the list of landscapes that have been assigned to the record.

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☆ Home③ Recent ∨	1 10301_A Account	 Annual Revenue	No. of Employee	Amit Bar Owner	ngar	\sim
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Activities	Atherton Active					
Customers	Leigh South Active					
Accounts						
A Contacts						
Sales						
C Leads						
U Opportunities						
🗟 Quotes						
S Sales	Ed Active				H	▼ Save

Attribute Mapping for Landscapes

Once the relationship is created, select the same in the respective Entity map. As per our example, the Maplytics admin or system admin needs to *go to Maplytics App > Settings (Left bottom) > Entity Maps > Accounts Entity map > Attributes Mapping > Geography relationship > Select the 1: N relationship of Geography and Account.*

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eneral Attribute N	Mappings Tooltip Mapping Category Configu	uration Configuration	Advanced Settings Related
Address Line 2	Address 1: Street 2	Zip Code	Address 1: ZIP/Postal Code
Address Line 3	Address 1: Street 3	Country	
City	Address 1: City	Latitude	Address 1: Latitude
County		Longitude	Address 1: Longitude
Phone	Main Phone	Website	
Email		Land Area Mapping	Account - Geography
Territory			teconic - Geography

Assign lands to single record

In order to visualize the land of a record, user first needs to create the geography for the landscape and assign the geography to the respective record. To do this, open the required record and click on 'more

.... Q Dynamics 365 Maplytics ${}^{\odot}$ Q <u>نې</u> = 🖬 Save 🛱 Save & Close + New 🖧 Open Org Chart 🗋 Deactivate 🖄 Connect | 🗸 = Add to Marketing List 🗛 Assign 合 Home 0969 Ocean View Road 🕼 Email a Link 0 Account Recent 🗊 Delete \$ Summary Map Project Price Lists Details Field Service Scheduling Related () Refresh 🔍 Check Access ACCOUNT INFORMATION My Work Timeline 😵 Мар ♀ Search timeline Dashboards Account Name * 0969 Ocean View Road O Check-In Activities Enter a note... Phone (415) 555-9933 R 🥻 Land Area Mappi 🖓 Auto-post on 0969 Ocean View Roa Customers Account: Created By Bal m. Email Process Land Area Mapping ----Accounts Assign area to record(s) Geo Code Fax A Contacts 格 View Hierarchy Website ----Sales Parent Account C Leads U Opportunities Ticker Symbol 🗟 Quotes Relationship Type ----S Sales $\hat{\mathbf{v}}$ 63 Active

commands' to click on the button of 'Land Area Mapping'.

After clicking on 'Land Area Mapping', a new window will open as shown below where the user can upload Shape files or Excel files or draw shapes for the landscapes on the map.



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Plot Options

There will be two options that can be used to plot the landscapes on the map.

- Shape File
- By Drawing

Shape File

Users can select a shape file or an excel file to plot the respective lands on the map. The supported file formats are .shp, .kml, .geojson. Once the file is plotted on the map, user can use the selection tool at the right top corner to select, deselect, multi-select or delete the regions plotted on the map. Now user can select the required regions and right click to Assign Area.



User can here select the name for the selected region and click on 'Proceed' to save it.

Assign Lanu	×
Area Name *	
STATEFP10	
Select Record *	
A. HARRIS PERSAUD & SONS	

By Drawing

Users can also create geographies for the landscaping using the option of 'By Drawing'. They can use the drawing tool to draw the shapes for the required landscape on the map. Further, use the selection tool to select drawn shape(s) and right click to assign area.



Enter the name of the geography and click on 'Proceed'. The color of the drawn shape changes after getting assigned to the record.

Assign Land	×
Land Name *	
Hamilton	
Select Record *	
King, Christopher A Esq	
	Proceed

Assign lands to multiple records

User can select multiple records from the home grid and assign lands to the selected records from the same map. After selecting required records, user can click on the 'Land Area Mapping' button.

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☆ Home▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲▲<	Account - AL - USA \vee	Ŷ	Search this view
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My Work	✓ Kelly, Charles G Esq 9078681030 Mobile		Active
📅 Dashboards	✓ Kentucky Tennessee Clay 9073493342 Columbiana		Active
Activities	✓ Killion Industries 9073455932 Spanish Fort		Active
Customers	✓ King, Christopher A Esq., 9076968089 Winfield		Active
Accounts	✓ Kiqo Pure Gold Oldies 10 9074574992 Opelika		Active
A Contacts	Kisc 98 Kiss Fm 9073575633 Birmingham		Active
Sales	Knights Inn 9074561408 Birmingham		Active
😵 Leads	L & L Sales Co Inc 9072257566 MONTGOMERY		Active
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S Sales	1 - 50 of 81 (6 selected)		← ← Page 1 →

After clicking on 'Land Area Mapping', a new window will open as shown below where the user can upload Shape files or Excel files or draw shapes for the landscapes on the map as mentioned in the section of 'Plot Options' above. Now just like mentioned in the sections, use the selection tool to select the required land on the map and right click to 'Assign Geographies'.

User can now select the area name if used a shape file or enter the area name if used the drawing tool and further select the record to which the respective land has to be assigned. This is how user can select the required region and assign it to all the records.



ľ	Assign Land	1
L	Area Name *	I
L	STATEFP10	I
6	Select Record *	IS
di	Select record	N
	L Winik & Associates Inc	
	Litware, Inc.	
	Manhattan Supply Co Deer Pk	1
1	Matricciani, Albert J Jr	
1	Merlin Electric Co	
	707. (

Visualizing Assigned lands to the record

Users can select the entity in Datasource and the respective view in the 'Plot Records' card in Detail map to plot the record on the map as pushpins. While visualizing records on the Detail map, users can right click on any pushpin to open the Contextual menu and use the 'Show Land Area' button to plot the land that is assigned to the respective record.



If the user wants to see all the lands that have been assigned to all the records that are plotted on the map, they can use the 'Show Land Area' toggle button on the Layer Menu to show/hide the same.

User can also click on any area plotted on the map to open the Summary card to view the metadata (information from the shape file) of the region.







User can also select records from the home grid and click on 'Land Area Mapping' button from the ribbon to view all the lands assigned to the records. They can further assign more lands to the required records as mentioned in the section of 'Assign lands to multiple record' above.

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S	Sales	٥	1 - 5	0 of 81 (1	1 selected))																₩ ←	Page 1	\rightarrow



The below screenshot shows the lands assigned to the records selected from the Entity home grid.



Visualizing Assigned lands to the records having no geocoordinates

If the users are using an entity for landscapes which doesn't have its own address or are not geocoded, but have assigned lands to the records, they can still plot the lands assigned to the entity records. To do this select required record(s) from the entity dataset and click on 'Land Area Mapping' button from the Ribbon. This will open a window plotting all the lands that have been assigned to the records. User can further use the 'Plot Options' to plot lands on the map and assign them to the required records as mentioned in the section of the 'Plot Options' above.

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=	Fig. Show Chart Calt Edit Calt Activate Calt Deactivate Deactivate Delete V O Detail Map Calt C	😵 Heat Map 🛛 🕺 Land	d Area Mapping
☆ Home③ Recent ∨	Assigned Land Areas ~		V Se Assign area to record(s)
🖈 Pinned 🗸 🗸	✓ Account Name ∨ Main Phone ∨ Address 1: City ∨ Primary Contact ∨ ✓ A All In One Construction +44 1632 960454 Thorpe Jonsan Builder	filmmaker@gmail.	com Active
My Work	✓ A B E Doors & Windows +44 1632 960501 London		Active
静 Dashboards 闭 Activities	✓ A Datum Corporation +44 1632 960418 Kingston		Active
E Activities	✓ A. BIANCA CELESTIN & S(3815160013 Staten Island		Active
Customers	A. Datum Corporation (sa 555-0158 Redmond		Active
Accounts	✓ A. DINA VEDMED & SON 28351099606 Staten Island		Active
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Real-Time Tracking

With Real-Time Tracking, sales reps, service reps and resources can be tracked within all modules of CRM in real time. This will help to view the routes that are being followed by reps/resources as well as the routes that had been followed by them in the past. The appointments/bookable resource bookings that have been assigned to the resources can also be seen with the help of this feature. This feature also works in the Dynamics CRM app, Dynamics CRM sales app and Field Service app.

Configuration

To enable this feature, go to Maplytics App > Settings > Map Configuration Details > Default Configuration details record (the one with no user) > Real-Time Tracking > Enable Real-Time Tracking > select the checkbox.



neral Advance Settin	gs Check-In	Auto Sched	uling Real-T	ime Tracking	Related				
Enable Real-Time Tracking									
Refresh Interval (Seconds)	30								
Monday Tracking Start Time	12/13/2021	Ē	8:00 AM	(Monday Tracking End Time	12/13/2021	i	10:00 PM	
Tuesday Tracking Start Time	12/14/2021		8:00 AM	G	Tuesday Tracking End Time	12/14/2021		10:30 PM	
Wednesday Tracking Start Time	12/15/2021	Ē	8:00 AM	G	Wednesday Tracking End Time	12/15/2021	Ē	10:30 PM	
Thursday Tracking Start Time	12/16/2021		8:00 AM	G	Thursday Tracking End Time	12/16/2021		11:30 PM	
Friday Tracking Start Time	12/17/2021		8:00 AM	G	Friday Tracking End Time	12/17/2021	Ē	11:30 PM	
Saturday Tracking Start Time	12/18/2021	Ē	8:00 AM	9	Saturday Tracking End Time	12/18/2021		11:30 PM	
Sunday Tracking Start Time	12/19/2021	m	8:00 AM	G	Sunday Tracking End Time	12/19/2021	i	11:30 PM	

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Refresh Interval: Admins can select the 'Refresh Interval' to decide the interval (in seconds) at which the location of the Resources/Sales reps will be tracked. For example, every 30 seconds.

Day and Time: Working days and the start & end timings can be selected from the list. Based on this selection the reps/resources will be tracked. If admins do not want the reps/resources to be tracked on any particular day, they can leave the timings blank to avoid tracking on those days. Admins can also go to the Maplytics Configuration Detail record of individual reps to set different required timings for tracking.

User Settings for CRM Modules other than Field service

Real-time tracking can be used to track the reps/resources that have been added to the Maplytics team as users. The admin needs to **go to the user's record > Maplytics Location Tracking > Enable the tracking** for the individual users and can view the other details.

ary Maplytics R	eal-Time Tracking	Details	Administration	Omnichannel	Related
nable Real-Time acking	Yes				
st Tracked At	12/22/2021				📅 4:04 PM
titude	19.07160				
ongitude	73.02870				
acking Status	Tracking				

Enable Location Tracking: Select "**Yes**" to track the respective user.

Last Tracked At: This will show the date and time when the respective user was last tracked at.

Latitude & Longitude: These will be the coordinates at which the user was last tracked.

Tracking Status: This will show the current status of tracking for the user. Based on three situations the status will be as follows:

- Tracking The user has enabled tracking in the Maplytics app and the tracking is on
- Tracking Stopped Outside business hours Tracking has stopped as current time is outside business hours.



- Tracking Stopped Tracking Disabled/ GPS Issue/ Location Service Issue Tracking has stopped due to one of the three reasons:
 - The user has disabled tracking in the Maplytics app
 - GPS information is not available
 - There is issue with the location service.

Maplytics Real-Time Tracking App for Sales and Other Modules

The Reps can download & install the Maplytics App and log in to their CRM credentials. The app is available on Playstore and Appstore for Android or iOS devices.

When the reps log in to the Maplytics App they can view their current location on map in the form of a pushpin. The pushpin will move on the map whenever the rep makes any movement. The rep can select the toggle button to start the tracking. Once they have finished their work they can use the toggle button to stop the tracking and log out from the app.





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Note:

- Users should be added to the Maplytics team in order to be tracked.
- For field service, admin also need to enable 'Location tracking' within the Geolocation Settings of Dynamics 365 field service and select the timings, for example, every 1 minute to track the location of the Resources at every specified interval.
- The users should be logged in to the Field Service app for tracking in Field Service CRM.
- The users should be logged in to Maplytics app and the tracking option should be enabled for tracking in CRM with other Modules like Sales, Customer Service etc.

Once the Real-Time Tracking has been enabled, users can **go to the Detail map > Select Data source > select the Resource/User as the entity and the required view > click on Search**. Once the users/resources are plotted as pushpins on map, the resource location that is being tracked at every interval will be updated on the map. Users can click on the pushpins of the users/resources to open the tooltip card for that user/resource. Users can view the tracking information for only those Resources/Users that have been added to the Maplytics team and have Location tracking enabled in the User Settings. Users can click on the Users/Resources to view the tooltip card to find the two buttons for Real-time tracking, i.e., 'Today's plan' and 'Location History'.

Note: To view the Users as an entity in the option for 'Select Datasource', an entity map for the entity 'Users' should be created.



Today's Plan

'Today's Plan' button will allow the managers to view route assigned to the respective rep/resource to be followed today as well as the route that is being traveled by the respective rep/resource in real-time, and the appointments assigned to them for today. The route assigned to the rep/resource will be shown in sky blue color and the route that is being traveled by the rep/resource in real-time will be shown in navy blue color. As the rep/resource moves on the field, the pushpin for the rep/resource can also be seen as moving on the map.

Sales and Other Modules

Clicking on the User's pushpin, its tooltip card opens up. User can also hover on the plotted user's pushpin to see further information about the rep. The below screenshot shows the information about the rep in the tooltip card for the rep 'Robert H'. Here user can click on the 'Today's plan' button to track Robert for today.

Users can view the following information of Appointment Timestamps on the Summary card opened up for the respective rep. They can also hover on the resource pushpin to see these details.

- Start Time
- End Time
- Total Travel Distance
- Total Travel time
- Total Appointments
- Total Completed Appointments
- Total Canceled Appointments
- Total InProgress Appointments
- Total Scheduled Appointments







User can go to the Layer Menu and use the toggle button to show/hide the route being tracked in the real-time and the route that was assigned to the resource.



Bolt Fencing Solutions	\times
→ DIRECTION → SET AS CUR → SET	AS POI
H/15, Padmashri Dr D Y Patil Road,	Thane,
Account Name: Bolt Fencing Solution	s
Take An Action	

User can also click on the pushpins of the waypoints on the map to view the details of the respective Account/Contact.

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Field Service

Clicking on the Resource's pushpin, the tooltip card opens up. The below screenshot shows the Tooltip card of the Resource Sam K.



Users can view the following information of Booking Timestamps on the Summary card opened up for the respective resource. They can also hover on the resource pushpin to see these details.

- Total Travel Distance
- Total Travel time
- Total Bookings
- Total Completed Bookings
- Total Canceled Bookings
- Total InProgress Bookings
- Total Scheduled Bookings
- End Time
- Start Time

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User can go to the Layer Menu and use the toggle button to show/hide the route being tracked in the real-time and the route that was assigned to the resource.





User can also click on the pushpins of the Bookable resource bookings plotted on the map to see information about that booking.

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User can also click on 'View Data' button to view the details of the resources.





Location History

'Location History' button will allow the managers to view the routes that have been travelled by the reps/resources in the past. To do this, they can click on the 'Location History' button on the tooltip card, select the required date and click on search. Users can also select the time if they want to view the history between a specific duration on the selected date.

Sales and Other Modules

Clicking on the rep's pushpin opens up the tooltip card. The below screenshot shows the tooltip card for the Sales rep Robert H. Users can click on the highlighted button of Location History and select the date & time required and click on Search.

Robert H X	Location History
→ DIRECTION → SET AS CUR → SET AS POI	Select Date *
amani Dye Chemical Private Limited, D/	2021-12-30
ull Name: Robert H Business Unit: org90138f7d	Start Time 8:30 AM
ake An Action	End Time 6:00 PM ③

This will show the route assigned to the respective rep to follow on the selected date as well as the route that was actually travelled by the respective rep. Here we can see that Robert H is travelling the exact route that was assigned to him. Users can view the information of Appointment Timestamps on the Summary card opened up for the respective rep. They can also hover on the rep pushpin to see the details. User can also click on 'View Data' button to view the details of the reps.



User can go to the Layer Menu and use the toggle button to show/hide the route being tracked for the selected date and the route that was assigned to the rep.



Directio	ins X	(
	🗸 Robert H	
6		
≡ 🖪	12, Kalamboli, Panvel, MH 4102	×
= B	S V Tank and Vessel Limited, 3,	×
≡ ©	Sion Panvel Expressway Raigad	×
≡ 0	H/15, Padmashri Dr D Y Patil Ro	×

Users can go to the Direction card to select the reps required from the list there and click on Today's plan or Location history button to view the tracked information for the respective resource.



Field Service

Clicking on the resource pushpin opens up the tooltip card. The below screenshot shows the tooltip card for the resource Sam K. Users can click on the highlighted button of Location History and select the date & time required and click on Search.

Sam K	× Location History
→ DIRECTION → SET AS CU → SET AS	PO Select Date *
Amar Deep Apartment, E-1/11, Balaram Hir	2021-04-16
Resource Type: User Organizational Unit: Fabrikam US	Start Time
Business Unit: firecrm032sb Tracked At: 4/24/2021 2:49 PM	9:30 AM
Take An Action	6:30 PM
	Sez

This will show the route assigned to the respective resource to follow on the selected date as well as the route that was actually travelled by the respective resource. Here we can see that Sam K had travelled the exact route that was assigned to him. Users can view the information of Booking Timestamps on the Summary card opened up for the respective resource. They can also hover on the resource pushpin to see the details.

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If users are visualizing the tracking information for multiple reps/resources or multiple days, each route will be plotted into different colors so as to be able to differentiate between individual routes. Further users can close the Summary card to remove the tracking information for the respective rep/resource from the map. Thus, users can track reps/resources in the following ways.

- Single rep/resource for multiple days
- Multiple reps/resources for single day
- Multiple reps/resources for multiple days



Real-Time Tracking in Mobile

Users can use Real-Time Tracking within the Field Service App/Dynamics CRM app/Dynamics CRM Sales App as well, just like the way explained above for desktop. Once they have plotted the reps/resources on the map, they can click on the pushpins to open the tooltip card and see the buttons for Location History and Today's Plan to view the travel history of the rep/resource for the required dates and time or the travel plan of the rep/resource for today respectively.





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Maplytics API

Maplytics API allows users to retrieve geographical data from Maplytics maps to use it outside of CRM. If a user needs to show CRM data based on a Proximity search or from a specific region etc. on a portal or website, they can use Maplytics API to do the same. Maplytics API will be used to make API request to give the response as per user input like proximity, region etc. For example, if a user has a website that provides training for driving and they want to allow the visitors to find trainers nearby their location. If the trainers are stored in Dynamics CRM, then Maplytics API can be used to show the results of Maplytics Proximity search i.e., the trainers around a specified location on the website while a visitor searches for it.

Maplytics API will be provided with a transaction limit. The transaction count will be provided as per the user's requirement. The API transaction usage will be counted into three ways. Please contact Inogic at <u>crm@inogic.com</u> if interested into using Maplytics API.

- Daily
- Monthly
- Yearly

The transaction limit will be provided based on the required usage among the three mentioned above. Let's say, based on user's requirement, if they have been provided with daily transaction limit of 100 then the user will be allowed to make 100 API requests per day. If the user exceeds the limit for a day, then a message will be shown that will inform the user that they are not allowed to make any more API requests for today. Then the user will be able to make API requests the next day. It will work the similar way for the Monthly and Yearly usages.

Note: To execute API request you should have active Maplytics license.

List of APIs:

- 1. Proximity Search
- 2. Region Search
- 3. Territory Search
- 4. Template Search
- 5. Direction instruction
- 6. Get Timezone

API accepts following parameters. Based on the value passed in the parameter of the respective operation it will get the response. Also, Parameters are optional.

By Proximity

Suppose you want to search using proximity. For this, we have created the custom action with name "Inogic.Maplytics.API.Proximity" (ikl_InogicMaplyticsAPIProximity).

Custom action accepts following parameters:

- **CurrentLocation**: Location for which you want to do the proximity search.
- **Proximity**: Provide the proximity radius. e.g., 3. If you want to do Concentric Proximity search, then specify multiple proximity radii separated by comma ','. For example, 5, 10, 15.
- **DistanceUnit**: Provide the radius unit. It can be either "mile or kilometer". If the unit is not specified then by default mile will be considered as the radius unit.
- Records: EntityCollection
- Entity: Provide the entity name. e.g. "Account"
- ViewName: Specify the view name. e.g., "My Active Accounts"

When user passes the required parameters and executes this action then it will return records collection.

Note: As custom action has 2 minutes timeout so maximum records that are processed is around 90K- 100K. If you have a view having records more than 100K then it may throw a timeout issue. So, make sure to enter the viewname of the view that has less then 100K records.

To execute proximity action using the C#, use the following code.

To execute the action using the javascript (web api) you can use following code.

```
function executeCustomAction() {
    try {
        var actionObj = {
            CurrentLocation: "New York",
            Proximity: "10,25",
            DistanceUnit: "Mile",
            Entity: "account",
            ViewName: "My Active Accounts",
```

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```
}
        // call this function to execute the action
       execute(actionObj, "ikl_InogicMaplyticsAPIProximity()", function (data) {
            alert("Success: " + data);
        }, function (error) {
            debugger;
            alert("Error: " + error.message);
        });
    } catch (e) {
        alert(e.message);
    }
}
function execute(req, reqName, successCallback, errorCallback) {
    //create AJAX request
    $.ajax({
        type: "POST",
        contentType: "application/json; charset=utf-8",
        datatype: "json",
        url: encodeURI(getWebAPIPath() + reqName),
        data: window.JSON.stringify(req),
        beforeSend: function (xhr) {
            //Specifying this header ensures that the results will be returned as JSON.
            xhr.setRequestHeader("Accept", "application/json");
            //xhr.setRequestHeader("Content-Type", "application/json; charset=utf-8");
xhr.setRequestHeader("OData-MaxVersion", "4.0");
            xhr.setRequestHeader("OData-Version", "4.0");
        },
        success: function (data, textStatus, xhr) {
            //successCallback function
            if (data != null && data.value != undefined) {
                 successCallback(data.value);
            } else {
                 successCallback(data);
            }
        },
        error: function (xhr, textStatus, errorThrown) {
            errorCallback(Inogic.Maplytics.ApiLib.errorHandler(xhr));
        }
    });
}
function getWebAPIPath() {
    return Xrm.Page.context.getClientUrl() + "/api/data/v8.0/";
}
```

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By Region

Suppose you want to search records within a specified region. For this, we have created the custom action with name **"Inogic.Maplytics.API.Region"** (ikl_InogicMaplyticsAPIRegion). Custom action accepts the following parameters.

- **RegionType**: Provide the type of region based on which user wants to search. , i.e., City, State, County, Country, PostalCode, PostCode Sector, PostCode(Outward Code), PostalCode Areas "City/Postalcode/State". You need to provide any of the above.
- **Region**: Provide the region where you need to search. E.g., New York.
- Entity: Specify the entity name. e.g., "Account"
- ViewName: Specify the view name. e.g., "My active accounts"

When user passes the required parameters and executes this action then the action will return records collection.

To execute region action using the C#, use following code.

To execute the action using the javascript (web api) you can use following code.

```
var actionObj = {
    RegionType: "City",
    Region: "New York",
    Entity: "account",
    ViewName: "My Active Accounts",
    // call this function to execute the action
    execute(actionObj, "ikl_InogicMaplyticsAPIRegion()", function (data) {
        alert("Success: " + data);
    }, function (error) {
        debugger;
        alert("Error: " + error.message);
    });
```

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By Territory

Suppose you want to search records within specified territories. For this, we have created the custom action with name "Inogic.Maplytics.API.Territory" (ikl_InogicMaplyticsAPITerritory).

Custom action accepts the following parameters.

- Territories: Specify the names of territories. E.g., "FL, NY".
- Entity: Specify the entity name. e.g., "Account"
- ViewName: Specify the view name. e.g., "My active accounts"

When user passed the required parameters and executes this action then the action will return the collection of records.

To execute region action using the C#, use following code.

To execute the action using the javascript (web api) you can use following code.

```
//By territory
    var actionObj = {
        Territories: "NY",
        Entity: "account",
        ViewName: "My Active Accounts",
    }
    // call this function to execute the action
    execute(actionObj, "ikl_InogicMaplyticsAPITerritory()", function (data) {
        alert("Success: " + data);
    }, function (error) {
        debugger;
        alert("Error: " + error.message);
    });
```



By Template

If you want to search records based on Maplytics template then for this we have created the custom action with name "Inogic.Maplytics.API.Template" (ikl_InogicMaplyticsAPITemplate).

Custom action accepts the following parameters.

Template: Specify the Template name. E.g., "Accounts with 10 miles".

When user passes the required parameters and executes this action then the action will return the collection of records.

To execute Template action using the C#, use following code.

string requestName = "ikl_InogicMaplyticsAPITemplate";

```
//create request object
OrganizationRequest orgReq = new OrganizationRequest(requestName);
```

orgReq["Template"] = "Accounts with 10 miles";

```
//execute the request
OrganizationResponse response = service.Execute(orgReq);
```

```
EntityCollection recordsCollection =
(EntityCollection)response.Results["RecordsCollection"];
```

Get Time zone

To get the time zone of a region, when we pass address or latitude/longitude then it will return the time zone.

To execute time zone action using the C#, use following code.

```
string requestName = "ikl_InogicMaplyticsAPIGetTimeZone";
```

```
//create request object
OrganizationRequest orgReq = new OrganizationRequest(requestName);
```

orgReq["TimezoneLocation"] = "new york";

```
//execute the request
OrganizationResponse response = service.Execute(orgReq);
```

```
string TimeZone = "TimeZone: " + (string)response.Results["TimeZone"];
```

```
string TimeZoneAbbreviation = "TimeZoneAbbreviation: " +
(string)response.Results["TimeZoneAbbreviation"];
```

To execute the action using the javascript (web api) you can use following code.

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```
var actionObj = {
    TimezoneLocation: "New york",
    }
    // call this function to execute the action
    execute(actionObj, "ikl_InogicMaplyticsAPIGetTimeZone()", function (data) {
        alert("Success: " + data);
    }, function (error) {
        debugger;
        alert("Error: " + error.message);
    });
```



PowerApps Component Framework

User can add custom controls on fields or grids within Dynamics CRM. These custom controls will help the user to view the respective records on the map on the record form or the entity grid without switching to any other screen. This will enhance the user experience while working with views and individual records. User can add the following custom controls:

Map View Control for Record

User can add this control on any of the field with the Data type 'Single Line of Text' of the record to view the respective record plotted on the map. User can further view the Address and geo-coordinates on the hover of the pushpin.

<u>Steps to Add control</u>: To add the control to a field within a record form, user can follow the steps mentioned below:

1. Go to Settings > Advanced Settings > Customizations > Customize the System > Components > Entities > Required Entity

Here, we have taken the Lead entity for an instance. *Within Leads, go to Forms > Main Form > Select a field > Change Properties*



Note: The data type of the field on which user needs to add control should be 'Single Line of Text'.

2. Go to Controls > Add Control > Select Map View Control for Record > Add

speay Formatting Details Events Business Rules Controls Label Specify the label for this field in forms.	Add Control
Label * View record on Map	Select a custom control from the field.
Field Behavior	Maplytics - Map View Control for Record Age View Control
Specify field-level behavior Field is read-only	Metadata Control PostLoad Picklist Control
LockingSpecify whether to lock this field on the form.	Maplytics - Map View Control for Record Modes: Types: SingleLine.Text Types: SingleLine.Text
Visibility	Visualize address on the map. Hover over the pushpin to show the address details.
Availability	Add
OK Cancel	ОК



3. User can choose to allow the control on Web, Phone or Tablet. Click on 'OK' > Save & Publish.

		Decans	Events	Business Ru	iles Contr	ols	
Contro	l			Web	Phone	Tablet	
Text Bo	x (default)			0		0	
Maplyt	ics – Map View	Control for R	ecord	۲	۲	۲	×
NGG CO	itroin.						
Maplyt	cs – Map View	Control for R	ecord				
Proper	by		Value				
Field D	iy		value				
TICIU P	roperty *		new_v	lewrecordoni	пар		

4. User can open any record of the entity to view this control added on the field.



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Map Edit Control for Record

User can add this control on any of the field with the Data type 'Single Line of Text' of the record to view the respective record plotted on the map. User can hover on the pushpin to see the coordinates as well as the address of the pushpin. User can further drag the pushpin around and drop it on the required location to update the new Address and the geo-coordinates for the record. User can also type in the address in the space provided and click on the update button to update the Address and the geocoordinates for the record. Before updating this, the user will be shown a message where user can also choose if they want to save address and the geo coordinates or only the geo coordinates.

<u>Steps to Add control</u>: To add the control to a field within a record form, user can follow the steps mentioned above while selecting 'Map Edit Control for Record' in the Step2. After adding the control user can open any record of the entity to view this control added on the field.

=	+ New 🗋 Deactivate 🖏 Connect 🗸 🚎	Add to Marketing List 🛛 Assign 🖾 Email a Link 📋 Delete 🖒 Refresh	🚱 Map 🕒 Process ∨ 🛛 🦻 Geo Code …
 Home Recent Pinned 	Adrian Dumitrascu Contact Summary Map Details Scheduling Files	Related	SYSTEM Owner ~~
y Work	CONTACT INFORMATION First Name	Timeline + V ····	Company C Adventure Works
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Accounts	Search Address Update		
Contacts	Kensington B		
lies Leads	west		
Opportunities	Randburg		
ð Quotes	Blairgowrie Inanda		

Map View Control for Dataset

User can add this control to any entity to visualize all of the records of the view or sub-grid on a map. User can further hover on the pushpins to view the information regarding the records. The information on the hover of the records is customizable. To add more information on hover, please refer to the section of Advanced Settings within the Entity maps in the Installation manual. User can also click on the pushpins to highlight them. Highlighting multiple pushpins can help the users to perform various actions from the ribbon on all the highlighted records at once. User can also right click on any pushpin to open the respective record.

<u>Steps to Add control</u>: To add this control on an entity grid, user can follow the steps mentioned below:

1. Go to Settings > Advanced Settings > Customizations > Customize the System > Components > Entities > Required Entity

Here, we have taken the Contact entity for an instance. *Within Contacts, go to Controls > Add Control > Select Map View Control for Dataset > Add*



2. User can choose to allow the control on Web, Phone or Tablet. Click on Save > Publish.

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Information					
ution Default Solution	General Primary Field Controls				
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E Sconnection Role					
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Contact	Maplytics – Map View Control for Dataset	۲	۲	۲	×
Contact Price List	Add Control				
Contract	Add Control				
Contract Line					
Contract Template					
Currency					
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Customer Asset Cat	1 Droporty	Value			
Security Customer Relations	Fighting	value			
Database Version	Dataset_Display_Key				
Delegation					
Discount					
Discount List					
> 🗟 Document Location					
Duplicate Detection					
Email					
Email Server Profile					
Email Signature					
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D 🗓 Entitlement Entity A					
a landt an anna a sao a sa					

3. User can open any view of the entity to view this control.



Detail Map Control for Dataset

User can add this control to any entity dataset or dashboard to visualize all of the records of the view, sub-grid or dashboard on a map. User can also click on the pushpins to highlight them. Highlighting multiple pushpins can help the users to perform various actions from the ribbon on all the highlighted records at once. Detail Map Control provides the user with the freedom of using Maplytics features right from the page without switching to any other screens. User can also perform the following Maplytics features within the Detail map control. To know about these features in detail, please refer to the respective feature section in this manual.

Note: Visibility of Maplytics actions within the Detail map control will be dependent on the actions selected within the Security Template if any assigned to the logged-in user. Please refer to the Security Template section.

<u>Plot entity records</u> – The records of the entity dataset on which this control has been added will be
plotted on the map by default. They can hover on the pushpins to view the details regarding the
pushpin and click on the pushpins to open the respective tooltip card. Users can use right-click to open
the contextual menu which allows to take certain actions on the respective pushpin. They can open
the record, set the respective record's location as origin, destination or a waypoint to a route. They
can further set the record's location as current location,



POI location or take actions like add tasks or Schedule Appointment based on the actions configured for the Tooltip card. With the Contextual Menu, user can use the option of 'Save Settings' to save the default locations for current location, Origin, Destination and the default Map Zoom Level & map centre.

• <u>Plot multiple datasources</u> - Other than the default data plotted on the map i.e. the Entity dataset on which the Detail map control has been added, user can also select two more Data sources and

their respective active views to plot the same on the map. Thus, a maximum of three datasources can be visualized on map.

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• Users can also select the required colors and the shape of the pushpins for the records of the view within the Datasource section in the Plot Records card. Once the color or pushpin is selected, it will instantly reflect on the map.

Datasource	^
Account $$	My Ac 🗸
+	
Select Categor	y (•)
Account	Select
	Search

Note: By default, the color and shape of the pushpins will be plotted based on View configuration in the Entity map.

• <u>Multi-Address Plotting</u> – If users have multiple addresses saved for their entities then users can use the feature of Multi-address plotting to plot the records based on multiple addresses at once in the same map. This feature enhances the visualization experience of those records that have a presence



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in multiple cities or states etc. The required addresses once configured within the Entity map can be selected and plotted on the map.

In the Plot Records Card, the user can click on the three ellipse $\stackrel{:}{}$ and then click on the 'Select

Address' button after selecting the Datasource & View and select the multiple addresses based on which the records need to be plotted and hit the search button. The respective addresses plotted on the map will also be listed in the layer menu which can be toggled to focus on the required data on the map.



<u>Search Options</u> – User can choose the search options By Location
 By Region
 , or By Drawing
 to plot the data as per their requirement.

Plot R	lecords	×
+	Search 1	\sim
2	2	

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By Location: This search option will be selected by default. The following screenshot shows records of the default view My Active Accounts been plotted by location.



By Region: The below screenshot shows the active account records falling in Alabama, USA.



By Drawing: The below screenshot shows the accounts falling into the drawn shapes.

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• <u>Plot categorized data</u>- User can also select an attribute for each data sources plotted on the map with the option of 'Select category' to categorize the data sources based on the selected respective attribute.



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Users can also select the required colors and the shape of the pushpins for the respective category within the category card. Once the color or pushpin are selected, it will instantly reflect on the map.



 <u>Multiple-Category for single entity</u> - User can also plot a single entity records categorized by multiple attributes. For e.g. Account records categorized by Open revenue, Originating lead, Owner. The user can choose an entity twice or thrice with two or three different views respectively and choose required attributes for the respective views to categorize the same entity with different attributes. User can select a maximum of three attributes to categorize a single entity.



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<u>Tooltip card</u>: While users clicks on any record's pushpin, the pushpin will be highlighted and the tooltip card will open for the respective record. User can view more details of the record on the tooltip card. The tooltip card actions buttons will allow the user to perform required actions like Show related records, create tasks, create phone calls etc. on the selected record. The screenshot shows the use of the Tooltip card action button 'Plot related records' that plots related records based on the selected relationships for the respective record.









<u>Show Entity Image</u> – If a record has an image saved within, while the user clicks on such record they
will be able to see the image record on tooltip card. Moreover, the user can also hover on the image
appearing in the tooltip card to zoom in on the image. User needs to select the 'Default Image' field
in the field of 'Entity image' in Entity map to view the record image on hover and tooltip card. Please
refer to the installation manual.



Users can also hover on pushpins plotted on the map to have a quick glance at its details as well as the image associated with the record.

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 <u>Proximity search</u> – User can set any location as the current location from the tooltip card or contextual menu with a right-click on any location on map. Once the user sets the current location, they can perform Concentric Proximity Search and can look for the Line-of-Sight Distance on the hover or the tooltip card for any record plotted within the proximity.



 <u>POI locations</u> – User can set any location as the POI location from the tooltip card or contextual menu with a right-click on any location. Once the user sets the POI location, they can use the POI card and view any geo-tagged Bing mapped locations by clicking on the icons available on the POI card or entering the keyword for the required location. For example, the below screenshot shows the POI locations plotted for Coffee places and Dentist.



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<u>Route Optimization</u>– User can set any location as the origin, destination or a waypoint from the tooltip card or contextual menu by right clicking on a record or anywhere on the map and get the route created for the waypoints selected. User will get further options like selecting the unit for the distance, Optimize Route based on Shortest Time or Shortest Distance, avoiding highways or toll roads and see Traffic etc. within the direction card. Once the route is created, user can use the 'Save' button on the Directions card to save the route. They can use this button to it to add changes to an existing route or save it as a new route with a date and owner assigned. The saved route can later be plotted using the 'Open Saved Route' option by entering a date or range of date.

User can also use the 'Open Navigation Links' button on the Direction card to view the turn-by-turn directions to navigate themselves for the route on Google Map, Waze App, or Apple Map based on the App Set in User Configured Detail record. User can also send the route as an email to any other user or clear the route with the options on the Direction card. User can also click on 'Print Route' to print a Route as well as the adjoining Map.



• <u>Layer Menu</u>- User can show/hide the layers of the plotted data on the map using the Layer menu to view only the data that is required.





• <u>Current location</u>- While using Maplytics Detail Map Control on Mobile/Tablet, users can easily plot their current GPS location with the help of the 'Locate me' button thereby making it easier to perform Proximity search and relate the data plotted on the map in terms of their location.



• <u>Check in/out</u>- Check-In feature enables users to register their arrival and departure time for the meetings while navigating on field with the help of Check-In and Check-Out buttons. User can click on any record's pushpin to open the Tooltip card and click on the Check-in button to register the arrival to the meeting location and click on the same button that gets converted to the Check-out button and register the meeting completion and departure from there. User can further add some notes for the respective records and also create pending check-in/out requests if they are outside the default radius.

Once field team has check-in/out for respective meetings, their managers can plot the Check-in entity to plot the respective check-in/out records on the map and analyze pushpins are valid and which are invalid to track the performance of the field team. They can also plot the pending check-in/out requests and approve/reject the same.





 <u>Land Area Mapping</u> – Organizations working with lands, real estates or farms etc. can visualize their lands/properties on map with this feature. Users will be able to assign land regions to the records and visualize them on the map to understand the coverage of area for each of the records using this feature.

Lands can be assigned to the required records as mentioned in the section 'Land Area Mapping' in this manual. Once the lands are assigned, users can select the entity in Datasource and the respective view in the 'Plot Records' card in the map to plot the record on the map as pushpins. While visualizing records on the map, users can right-click on any pushpin to open the Contextual menu and use the 'Show Land Area' button to plot the land(s) that is assigned to the respective record. The user can also see all the lands that have been assigned to all the records that are plotted on the map, using the 'Show Land Area' toggle button on the Layer Menu and show/hide the same.





• <u>Multi search layer</u> - While users have so many search options and features to plot data on the map, they also have the capability to perform more than one search at a time to plot data on a map. For example, if the user needs to view the data with the search of By Region as well as By Drawing together on the same map, they will be able to do it with this ability of Multi search.

In the Detail map control, the records from the respective view will be plotted by default. In the below screenshot, the map shows the default view of the Accounts plotted with pushpins in green color. To add more searches to the map, user can click on 'Add New Search' + to select the required search option and Data sources for the same.



The below screenshot shows that the Search option 'By Region' is selected in the New search which becomes 'Search 2' after clicking on Search button. It is now showing all the records from Alabama, USA

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in pink color. However, as the default view was already plotted in green color pushpins, the records are still there as the part of Search 1. Since the views for both of the searches is the same i.e. the default view the pink pushpins of Search 2 are overlapping on the green pushpins of Search 1.



The number of multiple Searches is visible in Plot Records Card. User can also click on the 'Delete' to delete the respective search layer.

Layer Menu	
Search 1	^
My Active Accounts	\bigcirc
Search 2	^
💽 🐵 Region Layer	*
My Active Accounts	\bigcirc



The 'Layer Menu" will show the layers based on the Searches performed. In this screenshot, it is showing the Search 1 that contains the default view plotted and the Search 2 with the records plotted from Alabama State using 'By region' option as mentioned above. User can use the toggle buttons to hide/show the Search layers or the layers within an individual Search. This will also help to view the pushpins that are overlapped by other pushpins in case the views selected in two searches are

the same like in our example above.

Users can also use the ability of Multi Search layers to perform Proximity Search at different locations in the same map. The below screenshot shows Search 1 where the Proximity search is performed on My




Active accounts that is the default view here & the All Contacts and Search 2 where the Proximity search is performed on My Active Accounts on a different location.



While clicking on the circles of the Proximity searches the Summary card information will be shown based on the pushpins belonging to the respective Proximity Searches.



• <u>Map mode and labels</u>- Two map modes are available viz. Road and Aerial view. User can also select to view the labels of regions on the map.

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• <u>Data Grid</u> – All the records of the view are listed in the Data Grid. The check box against the records can be ticked to utilize the records for operations.



In case a particular record needs to be selected, it can be filtered out from all the records of the view by adding a suitable keyword

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Hovering over the record image displays the details of the records. These details are configurable



Clicking on the record row in the data grid zooms the map view to the area of the pushpin. The pushpin blinks a couple of times and rests



• <u>Lasso Tool</u>- The user can use this tool to select a bunch of records together at once. The records will get selected in the data grid and be available to perform multiple activities.



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 <u>Mass Actions</u> – Mass Actions can be performed on the selected records. They could be added to a travel route, the selected data set could be saved, activities could be created for these records, mail could be mass sent to them.

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Add To Route: This option will add selected data points to the route. The user can add at max 25 data points to the route

Save Data: The selected records can be saved as static Marketing List or Personal View in Dynamics CRM

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Create Activities: User can create activities for non-activity Entity records currently selected in "View Data grid." The user can define the Activity, Subject, Schedule Start date and Schedule end Time, Duration, Owner(User/Team) and Priority. The activities selected in respective Entity maps can be seen in the list of activities available to create using the button of "Create activities". By clicking this button below window will open and the activities will be created based on the inputs given in the window by the user.

Send Email: The user can send a mass email to the selected records. User can select any one the available email templates or a new email to write their own content. User can also choose to keep the recipient as To/Cc/Bcc in the email.



• <u>Reset Button</u>- This button resets records as per current search

• <u>See More</u>- The current view displays the CRM Records on the current page. To view more records, user can click on the See More option at the bottom.





 <u>Print Route</u>- User can print a Route as well as the adjoining Map. User can plot a route on map, and use the button 'Print Route' to print the route.



Note: There are some limitations to some of the features mentioned above which will be available in our future releases.



<u>Steps to Add control</u>: To add this control on an entity grid, user can follow the steps mentioned below:

1. Go to Settings > Advanced Settings > Customizations > Customize the System > Components > Entities > Required Entity

Here, we have taken the Contact entity for an instance. *Within Contacts, go to Controls > Add Control > Select Detail Map Control for Dataset > Add*



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2. User can choose to allow the control on Web, Phone or Tablet. Click on Save > Publish.

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3. User can open any view of the entity to view this control.



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Address Autosuggest Control

Users can add this control on any of the fields with the Data type 'Single Line of Text' of the record to get auto suggestions of addresses while typing the respective field. User can select the required address and get that address auto-filled within the fields.

<u>Steps to Add control</u>: To add the control to a field within a record form, the user can follow the steps mentioned below:

1. Go to Settings > Advanced Settings > Customizations > Customize the System > Components > Entities > Required Entity

Here, we have taken the Accounts entity for an instance. *Within Accounts, go to Forms > Main Form > Select any field > Change Properties*

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Note: The data type of the field on which user needs to add control should be 'Single Line of Text'.

2. Go to Controls > Add Control > Select 'Maplytics - Address Autosuggest > Add

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	ACCOUNT INFORMATION		Maplytics - Address Autosuggest	Address 1: Name
	Account Name*	Account Name	Modes:	Address 1: Post Office Box
	Phone	Main Phone		Address 1: Primary Contact Name
	Fax	Fax	Type an address and select required address with the help of auto.	Address 1: Telephone 2
	Website	Website	suggestions provided.	Address 1: UPS Zone
	Parent Account	Parent Account		Address 1: UTC Offset
		Ticker Symbol	Add	Address 2
	Relationship Type	Relationship Type		Address 2: Address Type
	Product Price List	Product Price List		Address 2: Fax
		New editable grid	ontact	Address 2: Preight Terms
		Primary Contact	OK Cancel	Address 2: Post Office Box
				Address 2: Primary Contact Name
				Address 2: Shipping Method
Employees				Vew Field

3. While adding the control, user needs to choose the required address fields. While user uses Auto suggest control, the respective addresses that are selected here will be auto filled. User can choose to allow the control on the Web, Phone, Tablet. Click on 'OK' > Save & Publish.



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Note: Please uncheck the option of 'Display label' within the field properties for better visualization.

4. User can open any record of the entity to view this control added on the field. User needs to enter the address and based on the entered keywords, it will provide suggestions for addresses.





User can select the required address and it will get auto filled within the respective address fields.



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Heat Map



Clicking on the Heat Map command button will bring up the Heat Map Screen.

Select Datasource:

This option helps the user to choose the Entity and view combination to analyze the data.

Select Measure:

This helps the user to define the aggregation method to be used to color code the region. By default, it is based on number of records (i.e. 'By Count'). The user can change this to any other field attribute from the drop-down. Dropdown contains the list of all numeric and currency fields.

Select Category:

This option helps the user to filter data. The user can modify the search result using selection in the Category option.





Select Region Type:

This option helps the user to define the geography level for aggregation. The user can choose any option from the drop-down:

- City
- State
- County
- Country
- **PostalCode:** The smallest postcode category, such as a zip code.
- **PostCode Sector**: The second '1' is called "Postcode Sector". Example: CA1 1
- **PostCode(Outward Code):** This is called Outward Code, the part of the postcode before the single space in the middle. Example: CA1
- **PostalCode Areas:** The next largest postcode category after Postcode1 that is created by aggregating Postcode1 areas.
- **Territory:** This option will use the Sales Territory defined in Dynamics CRM.

Note:

- The regions that were plotted using the option Post code Areas before will now be plotted by using the option of Post code sector.
- The regions will be plotted as per the Bing maps.

The default option is to summarize the addresses by City. You can find the default settings on the Maplytics Configuration record for the individual user as shown below:

eral Advance Setting	gs Check-In Auto Scheduling Related		
Optimize Direction	No	Default Location	Loipersdorf bei Fürstenfeld 271, 8282 Loipersdor Fürstenfeld, Austria
Live Traffic	No	Navigate Within	Waze
Route Option	Shortest Time	Records Per Page In Grid	50
Map Center		Zoom Level	
Heat Map Type	Boundary	∆ User	
Summary Grouping	City	Maplytics Security	
Default Template		Set As Destination	Other
Set As Origin	Other	Other - Set As	Mont-devant-Sassey, Meuse, France
Other - Set As Origin	10 Voie des Vaches, 08450 Angecourt	Destination	·····

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Select Display

There are four options available to analyze data on Heat Map. Default Heat map display can be selected using Maplytics Configuration Settings.

Boundary

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



No Boundary

This option does not consider the region type. It simply creates a Heat Map by the density of the measure selected without geographical boundaries.





Pie chart

Users can view the data in the form of Pie charts based on the heat of the attribute selected in the Measure and Filter. Pie charts help the users to analyze the data on the basis of comparative data shown by the Pie charts on the map.



Column chart

Users can view the data in the form of column charts plotted on the basis of the heat of the attribute selected in the Measure and Filter. User can easily analyze the plotted data on the basis of the proportions shown by the respective columns.



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- o Hover: On hover, it shows the details of that Boundary/Pie chart/Column chart
- <u>Summary Card</u>: The user can click on any Boundary/Pie chart/Column chart to get the summarized information of the same.





Note: If Pie chart/Column chart is selected as the Display type, the option of Territory under Region Type will not be available.

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Search:

Clicking on the 'Search' button will plot the addresses of all the records that were selected in the view and has already been geocoded. Records that do not have their latitude/longitude updated in the record will be ignored and will not be plotted on the map.

Summary card:

Every time the users create a heat map visualization, a 'Summary Card' summarizing the aggregate information for the complete heat map will open up. This gives the users a brief summary of the heat map they created. The measure is also summarized by default.

Summary Card

Total Records: 486 Annual Revenue (Measure): \$256368,260.00 Annual Revenue (Sum): \$256368,260.00 No. of Employees (Sum): 23,400.00

 \times



The user can also click on any region plotted on the map to open the summary card for that region. This will also filter the data of the region in the data grid. To differentiate between the summary cards, the individual summary cards have the region name/number as the title.

If the user has selected a field attribute in the 'Filter' dropdown, the summary card will further summarize the information for the selected category filter as well.

Export to Excel: The search results are listed by the grouping selected at the bottom of the screen and user can further export these data points using this button as shown below;

town	Black Horse	East Brunswick	ridge	Keyport Keyport Keyport Matawan Amarka Keyport	eansburg Sandy H Port Monmouth Atla Jata wn Highl	ook Bay ntic Hisblands	\$0.00	\$66,227,773.
My Active Acco	Account Name	Address 1: City	Main Phone	Territory	Industry	Email	Created On	Annual Revenue
PostalCoo	de: 10302, NY, Staten Islan	d, USA (Count: 18)						
 PostalCod 	de: 10303, NY, Staten Islan	d, USA (Count: 21)						
-	Y. ANTHONY MOREN	Staten Island	4092255691	North - Staten	Transportation	robert10363@inogic.c	11/4/2016 12:00 AM	\$420,185.00
-	O. DAMIANO GERACI	Staten Island	40599969317	North - Staten	Engineering	douglas10430@inogic	11/6/2016 12:00 AM	\$993,938.00

This functionality adhere to CRM security roles, if the user does not have permission to 'Export Data to Excel' in CRM, then he/she will not be able to export data from Maplytics.

Zoom Level of Heat Map uses personalized 'Zoom Level' setting for the logged in user. Also, the color scale for the Measure will be fetched from the defined 'Heat Map Measure Color Scale' in the Entity Category configuration on the Entity Map for that particular entity.

<u>Print</u>: Clicking on the print button will print the heat map, as shown in the screenshot below:



Note: A4 size paper with landscape mode is recommended while printing.



Support for CDS

If user does not have Dynamics CRM, they can still use Maplytics by subscribing for the PowerApps platform. This platform comes packaged with some base entities that includes Accounts and Contacts along with other platform entities to provide support for it security and other infrastructure.

To use Maplytics within PowerApps, user can follow the steps mentioned below:

- A. Go to <u>admin.powerapps.com</u> > log in using PowerApps credentials.
- B. Click on 'New environment' > Enter the details > Create an environment

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separate databases.	Learn more
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Maplytics	
Region 🥥	
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Can't be changed once yo	our environment is created.
Environment type (୭
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• Click on 'Create database' > Select the required details > Create database

⊘ You create	ed an environment	Create a database for this environment ⑦ Choose the currency and language your data should use.
	Do you want to create a database? (Recommended) Your environment includes access to the Common Data Service. Create a database to start using it. - Collect, store, and share data. - Use data modeling - Create custom forms - Manage security and access to data	Currency ③ UsD Language ③ Indish Cucked sample apps and data Of sychoosing Create my database, you agree Microsoft can use entity and field name of mond ata model. These names may be stored in our diagnostic systems and copied across regions. Learn more Cucked Cu

• Click on 'Navigate to other Applications' > All apps > Powerapps > Select required environment





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Import Maplytics solution

• Click on solutions at the left navigation pane > Import > Maplytics. This will create the Maplytics App.

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• To access the Maplytics App, click on Apps at the left navigation pane > Select Maplytics App.

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Clicking on the Maplytics app, following Maplytics dashboard will open.



 <u>Activate and configure Maplytics</u>
 To access the Maplytics user needs to Activate and Configure Maplytics to start the license and configure the basic Entity maps, Dashboards and Census data.

- Go to Settings > License registration > Click on Activate
- Go to Settings > License registration > Click on Configure
- o Add users to Maplytics team
 - Go to Settings > Teams > Maplytics team > Add users

Note:

- 1. Entities of leads, Cases, Opportunity, Invoices are not available in PowerApps
- 2. Marketing lists are not available
- 3. While configuring, four Entity maps will get created for Accounts, Contacts, Appointments and Customer Address
- 4. Only three dashboards will get shipped on configuration

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Access Maplytics in PowerApps

User can use the credentials of the environment to log in to PowerApps and select the Maplytics app to perform Maplytics features. Use the buttons 'Details Map' or the 'Heat Map' to open the respective maps.





Maplytics Dashboard

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



Maplytics ships with five pre-defined Dashboards for various Sales and Service Modules for different user roles. To set up more dashboards, please refer the 'Installation Manual'.



View Category donuts in dashboard

Users can view the categorized data in the form of donuts on the respective dashboards.

In the screenshot below, in the first dashboard, the appointments for the team are plotted which have been categorized based on the status of the appointments. The donuts are shown based on the percentage of the records falling into the each of the categories. For example, 17.50% of the total appointments were canceled, 47.50 % of the total appointments are completed and 35 % of the total appointments are scheduled. If the user hovers over the donut, they can see the exact count of records falling into each of the categories.

Similarly, the second dashboard shows the heat map for the Accounts based on the annual revenue. The donuts show that 18.10% of the total Accounts have Annual revenue ranging from 0 to 5000 and 19.73 % of the total Accounts have Annual revenue ranging from 5000 to 10000.



Hide Donut Panel

The Donut Panel can be hidden as per the User's requirement by clicking on the arrow at the extreme right of the Panel. The same can be clicked again to expand the hidden panel and put it on display.





Filter records on Map using Donuts

The record pushpins displayed over the Map can be filtered out using the donuts. In the Dashboard below, when clicked on the Donut displaying the percentage of 'Completed' appointments, the pushpins on the map are filtered out to show only those Appointment records that belong to the 'Completed' Category. The rest belonging to Scheduled and Canceled are hidden. Similarly, when clicked on the 'Status' donut, the filter will be reset and record pushpins belonging to all categories of Appointments i.e. all appointments are displayed.





Hovering and Tooltip Card

When hovered over the record pushpins, the information about the respective record is displayed. The information shown here can be configured within the Advanced Settings within the respective dashboard record in the Maplytics Settings.



If the pushpin is clicked upon, a tool tip card is opened with the details of the respective record. The information shown on the Tooltip Card can be configured within the 'Tooltip Mapping' section of the respective dashboard in the Maplytics settings.





Steps to add Maplytics View to Dashboard

To include the Maplytics component in Dashboard, click on the new button and select to add Web Resource. Select '*ikl_/Maplytics/Maplytics.Dashboard.html*' web resource and set the name of the Dashboard record in the custom data parameter to be passed to the HTML web resource. The recommended number of rows in formatting is minimum 10.

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Web resource -		
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Label *	My Todays Follow-up Cases By Priority	
Display labe	on the Dashboard	
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Visible by de	rauit	
Web Resource	Properties	
	My Todays Follow-up Cases By Priority	
Custom Parame	er(data)	
Restri	ct cross-frame scripting, where supported.	
Pass I	ecord object-type code and unique identifier as parameters.	
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Create a route dashboard

To plot route on a CRM dashboard follow the steps mentioned below:

 User needs to include the Maplytics Detail Map component on the Dashboard. To do this click on the 'New' button in the section of dashboard and select 'Add Web Resource'. Select '*ikl_/Maplytics/Maplytics.DetailMap.html*' web resource.

Go to Sales > Dashboards > Click on "New" button

	Dynamics	365 1	Maplytic	s				
=			←	🛱 Save As	+ New $ \smallsetminus $	🗸 Set	t As Default	🖔 Refresh All
ŵ	Home		Ν	/aplytics H	반문 Dynamics :	365 Dash	board	
Ŀ	Recent	\sim					- L)
x?	Pinned	\sim		💧 Heat M	lap		<	
Му	Work			Select Data	source			
	Dashboards	_		~	Select View	~	Barents Sea	. A.
đ	Activities			Select Mea	sure	~		

2. Choose any layout as shown below:

			İ 🕻	ht.	
3-Column legular Dashbo	3-Column Multi-Focused	4-Column Overview Dashb	lha	~	lta
2-Column Regular Dashb 2-C	2. Column Regular Dashboard	3-Column Focused Dashb	3-Column Regular Dash This layout	iboard can accommoda	ite

3. Provide the dashboard name and click on the web resource button to add the Detail map HTML web resource.

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me: My	route Dashbo	ard					
ection			 				
			dt 🗉 🤇	2		_	
			_	Click on	this icon to		
				add the	web resource.		
				add the add the	web resource.		
				add the	web resource.		
				add the	web resource.		

- 4. Add web resource :'*ikl_/Maplytics/Maplytics.DetailMap.html*' web resource
- 5. Add a parameter in Custom Parameter (data) field as *<Dashboard Name>||dashboard||true* and click on 'OK'

-Web reso	ource		1
Web resou	rce*	ikl_/Maplytics/Maplytics.DetailMap.html	
-Field Nar	ne and Propertie	es	_
Name *	WebResource	e_ Route	I I
Label*	Route		
🗍 Displa	label on the Dashb	a	
		caro	
−Visibility ØVisibie	by default	caro	
–Visibility ⊠Visible ⊠Enable	by default for mobile	cara	
– Visibility ♥ Visible ♥ Enable	by default for mobile burce Properties	,	
-Visibility Visible Enable -Web Res Custom Pa	by default for mobile burce Properties rameter(data)	,	
– Visibility	by defauit for mobile burce Properties rameter(data)	,	

6. After saving the dashboard and user can see the route plotted on the dashboard.



Note: Only 25 waypoints can be added into the route.



Add a template in dashboard

Users can add a template to a Dashboard to visualize resultant data of pre-set search criteria on the dashboard in one glance.

To do this, user can select the required criteria on the map and save it as a template using 'Save Template' button. Please refer to the Template section in this manual to know more about saving templates. After saving the template, user can add the template to the dashboard.

Steps to add template to dashboard

User can create a new Dashboard as explained in above topics and add the web resource *'ikl_/Maplytics/Maplytics.DetailMap.html'*. They also need to provide the custom parameter (data) having template name. For example, the template with the name "Clients around supplier" should be entered as – Clients around supplier || template. Click Ok then Save

odify this Web	resource's properties.	
Web resource *	ikl_/Maplytics/Maplytics.DetailMap.html	J
Field Name	and Properties	
Name *	WebResource_Componentb054ba7	
Label *	Componentb054ba7	
Display lab	el on the Dashboard	
- Visibility		
Visible by c	lefault	
Enable for	mobile	
Web Resour	ce Properties	
Custom Parame	Clients around supplier template ater(data)	
Restr	ict cross-frame scripting, where supported.	
Pass	record object-type code and unique identifier as parameters.	

Once the web resource is added, user can refresh and open the dashboard to view the saved template. Moreover, if a user wants they can add multiple templates to a CRM dashboard to view multiple data in a single dashboard.

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Workflows

Maplytics ship the following workflows:

- 1. *Geocoding workflows* This geocodes addresses of the records and provides the values for respective Latitude and Longitude.
- 2. *Territory Assignment workflow* This assigns territories to CRM records on the basis of the addresses in the respective records.
- 3. **Driving Instructions workflow** This automatically generates directions (in HTML and Plain text format) between two related entity records using their respective addresses.
- 4. *Get Time zone workflow* This provides the time zone of the respective records in which they lie based on their addresses.

Geocoding workflow is configured for Account, Lead, and Contact entities and Territory workflow for Account by default. The user can set up these workflows for custom entities also.



Note: To run the workflow, please make sure the Microsoft Dynamics CRM Asynchronous Processing service is running as shown in below screenshot.

3						
n View Help						
(Local)						
	Services (Local)					
Micro	osoft Dynamics CRM	Name A	Description	Status	Startup Type	Log On As
Asyn	chronous Processing Service	Arrive Service	Provides a	Started	Automatic	Local Service
		Kan Hyper-V Guest Shutdown Service	Provides a	Started	Automatic	Local System
Stop	the service	K Hyper-V Heartbeat Service	Monitors th	Started	Automatic	Network S
Resta	e the service	Hyper-V Time Synchronization Service	Synchroniz	Started	Automatic	Local Service
		Hyper-V Volume Shadow Copy Requestor	Coordinate	Started	Automatic	Local System
		IIS Admin Service	Enables thi	Started	Automatic	Local System
Descr	iption: les the processing of queued	KE and AuthIP IPsec Keying Modules	The IKEEX	Started	Automatic	Local System
Async	chronous Events	🕵 Indexing Service	Indexes co	Started	Automatic	Local System
		Interactive Services Detection	Enables us		Manual	Local System
		🕵 Internet Connection Sharing (ICS)	Provides n		Disabled	Local System
		🖏 Intersite Messaging	Enables me	Started	Automatic	Local System
		🔅 IP Helper	Provides tu	Started	Automatic	Local System
		🖏 IPsec Policy Agent	Internet Pr	Started	Manual	Network S
		🆏 Kerberos Key Distribution Center	On domain	Started	Automatic	Local System
		🆏 KtmRm for Distributed Transaction Coordinator	Coordinate		Manual	Network S
		🆏 Link-Layer Topology Discovery Mapper	Creates a		Manual	Local Service
		🖏 Microsoft .NET Framework NGEN v2.0.50727_X64	Microsoft		Disabled	Local System
		🥋 Microsoft .NET Framework NGEN v2.0.50727_X86	Microsoft		Disabled	Local System
		Microsoft .NET Framework NGEN v4.0.30319_X64	Microsoft		Automatic (D	Local System
		Microsoft_NET Eramework MGEN v4_0_30319_X86	Microsoft		Automatic (D	Local System
		Microsoft Dynamics CRM Asynchronous Processing Service	Handles th	Started	Automatic	Network S
		Represented the synchronous processing Service (maintena	Handles th	Started	Automatic	Network 5
		Microsoft Dynamics CRM Sandhox Processing Service	Handles th	Started	Automatic (D	Network S

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Configure Geocoding workflows for custom entities

- 1. Go to *Setting > Processes >* Click on *'New'* to design a new Workflow Process.
- 2. Write Process name, choose 'Workflow' under category section and select desired entity as shown below;

rocess name:	Maplytics.GeoCodingWork	flow		
Category: *	Workflow	 Entity: * 	Account	•
Run this workflow	v in the background (recomm	nended)		
Type:	New blank process			
	New process from an exponent of the second secon	xisting template (select from list):		
Template Name	\uparrow	Primary Entity		Owner
		No process	template records a	e available in this view
				•
4				
 0 - 0 of 0 (0 selected 	()			🛛 🖣 Page 1 🕨

3. Select 'Organization' under 'Scope' dropdown. Select 'Record is created' and 'Record fields change' options as shown below:

Common	General Administration Notes Hide Process Properties			
Process Sessions	Process Name * Inogic.Maplytics.GeoCoding Activate As Process	Entity Category	Account Workflow	
	Available to Run Image: Second Seco	Options for Al Scope Start when:	tomatic Processes Organization Record is created Record status changes Record is assigned Record fields change View Record is deleted	T

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4. For the Record fields change option, select all of the address fields to ensure the address is geocoded when any of the address fields is changed as shown below;

Select	the fields that the process will	monitor for changes.		
	Display Name 🔺	Name	Туре	
	Address 1: Shipping Method	address1_shippingmethod	Option Set	
	Address 1: State/Province	address1_stateorprovince	Single Line of Text	
1	Address 1: Street 1	address1_line1	Single Line of Text	
1	Address 1: Street 2	address1_line2	Single Line of Text	
1	Address 1: Street 3	address1_line3	Single Line of Text	
	Address 1: Telephone 2	address1_telephone2	Single Line of Text	
	Address 1: Telephone 3	address1_telephone3	Single Line of Text	
	Address 1: UPS Zone	address1_upszone	Single Line of Text	
	Address 1: UTC Offset	address1_utcoffset	Whole Number	
	Address 1: ZIP/Postal Code	address1_postalcode	Single Line of Text	
	Address 2	address2_composite	Multiple Lines of Text	+

5. Select the *Inogic.Maplytics.Geocoding* workflow assembly from the Add step menu as shown below;

Note: Please don't select Latitude & Longitude field attribute here.

Common	General Administration Notes
Audit History	
Process Sessions Process Sessions	Check condition for Geocode Record If Account:Geocode Record does not contain data AND (Account:Address 1: Street 1 contains data OR Account:Address 1: City contains data OR Account:Address 1: State/Province contains data OR Account:Address 1: Street 2 contains data OR Account:Address 1: County contains data OR Account:Address 1: County/Region contains data), then:
	Set address input parameter to calculate the geocode.
	Inagic.Maplytics.Geocoding (5.4.0.5);GeoCodeWorkflow.GeoCodeAddress View properties
	Set calculated Latitude and Longitude in selected record.
	Update: Account View properties
	Othewise, If AccountsGeocode Record equals [No] AND (AccountAddress 1: Street 1 contains data OR AccountAddress 1: Street 2 contains data OR AccountAddress 1: City contains data OR AccountAddress 1: State/Province contains data OR AccountAddress 1: County (AccountAddress 1: Street 1 contains data OR AccountAddress 1: 2IP/Postal Code contains data), then:
	Set address input parameter to calculate the geocode.
	Inogic.Maplytics.Geocoding (5.40.5);GeoCodeWorkflow.GeoCodeAddress View properties
	Set calculated Latitude and Longitude when Geocode Record is equal to No.
	Update: Account View properties

Note: For custom workflows, add an 'AND' condition, if the address fields are not blank as shown in the above screenshot. This will avoid the trigger of the workflow if the address fields do not have any value.

 Click on 'Set Properties' and set the address parameter as shown in below screenshot for the workflow assembly;

File Save and Clo	ise	
Set Custom S	tep Input Properties	
Property Name	Data Type	Value
Street1	Single Line of Text	{Bill To Street 1(Invoice)}
Street2	Single Line of Text	{Bill To Street 2(Invoice)}
Street3	Single Line of Text	{Bill To Street 3(Invoice)}
City	Single Line of Text	{Bill To City(Invoice)}
StateOrProvince	Single Line of Text	{Bill To State/Province(Invoice)}
County	Single Line of Text	
Country	Single Line of Text	{Bill To Country/Region(Invoice)}
PostalCode	Single Line of Text	{Bill To Street 3(Invoice)}

- 7. Choose 'Update Record' from 'Add Step' menu after selecting 'Set Properties' record and select same entity for which workflow is being created.
- 8. Click on 'Set Properties' of the new record and in the update window set the Latitude, Longitude and Rating to the output parameters returned by the workflow assembly as shown in the screenshot below;

Latitude	{Latitude(Set address in
Longitude	{Longitude(Set address
Rating	{Rating(Set address inp

Geocoding Confidence Rating:

User can also check the geocoding confidence rating provided by Bing Maps. A 'Rating' field can be added that shows the confidence rating as High, Medium or Low. The 'Rating' field is set in the workflow as shown in the above screenshot.

4 Мар	
No Auto Geocoding	No
Street 1	3649 at HYLAN BLVD
Street 2	10308
Street 3	
City	Staten Island
State/Province	NY
ZIP/Postal Code	
Country/Region	USA
Latitude	40.54925
Longitude	-74.13826
Rating	Medium
Territory	

Note:

- Latitude and Longitude fields 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).
- Geocoding Confidence Rating cannot be checked for Geocoding plugin

Configure Territory Assignment workflow for custom entities

- Follow the Steps 1 3 from configuring geocoding workflow for custom entities. This will help you create a new workflow.
- For the Record fields change option, select all of the address fields to ensure the territory is changed when any of the address fields is changed as shown below;

	Display Name 🔺	Name	Туре	
	Account Name	name	Single Line of Text	-
	Account Number	accountnumber	Single Line of Text	
	Account Rating	accountratingcode	Option Set	
1	Address 1	address1_composite	Multiple Lines of Text	
1	Address 1: Address Type	address1_addresstypecode	Option Set	
1	Address 1: City	address1_city	Single Line of Text	
1	Address 1: Country/Region	address1_country	Single Line of Text	
1	Address 1: County	address1_county	Single Line of Text	
	Address 1: Fax	address1_fax	Single Line of Text	
	Address 1: Freight Terms	address1_freighttermscode	Option Set	
1	Address 1: Latitude	address1_latitude	Floating Point Number	-

3. Click on 'Add Steps' and add 'AssignTerritoryWorkflow.AssignTerritory' assembly as shown below;

Process: Inogic.Territory.Ass	ignment.Workflow	Working on solution: Default Sol	ution
4 Common ☑ Information ☑ Audit History 4 Process Sessions ☑ Process Sessions	General Administration Notes + Hide Process Properties Inogic.Territory.Assignment.Workflow Activate As Process Activate As Process As a Nut This workflow in the background (recommended) Image: As a non-demand process As a child process Morkflow Job Retention Image: Automatically delete completed workflow jobs (to save disk space)	Entity Contact Category Workflow Options for Automatic Processes Scope Organization ▼ Start when:	*
	Add Step > 3-ainsert > Delete this step. Asign Record Send Email Start Child Workflow Perform Action Change Status Stop Workflow VoC Inogic.Maplytics.AssignTerritoryWorkflow (1		•
Status: Draft	Inogic.Maplytics.Geocoding (5.4.0.4) AssignTerritoryWe	/orkflow.AssignTerritory	

4. Click on *'Set Properties'* and set the address parameter as shown below and Save this. NumberOfRecords – Set the number of records to be fetched from the CRM at once

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Configure Get Time Zone workflow

- 1. Go to Settings > Processes > Click on 'New' to design a new Workflow Process.
- 2. Write Process name, choose 'Workflow' under category section and select desired entity:

File Save and Close				<u>@H</u> elp ▼
Process: Maplytics. Set Custom Sto	AssignTerritoryWorkflow ep Input Properties		Working on solution: Defaul	t Solution
Property Name	Data Type Required	Value	Form Assistant	> ~
Latitude	Floating Point N Optional	{Address 1: Latitude(Lead)}	Dynamic Values	*
Longitude	Floating Point N Optional	{Address 1: Longitude(Lead)}	Operator: Set to	~
NumbersOfRecord	Whole Number Optional	4,000	Look for: Lead	~

Process name: *	Get Timezone			
Category: *	Workflow 🔻	Entity: *	Account	•
Run this workfl	ow in the background (recommended)			
We recommend usi	ng <u>Microsoft Flow</u> instead of background w	orkflows. <u>Click here</u> to	start building Flows!	
Туре:	New blank process New process from an existing temple	ate (select from list):		
Translat	- Norma A	Defense v F		Owne

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3. Select 'Organization' under 'Scope' dropdown. Select 'Record is created' and 'Record fields change' options.

Common General Administration Notes Information Hide Process Properties Hide Process Properties Process Sessions Activate As Process Aualable to Run Run this workflow in the backpround (recommended) As an on-demand process As a child process Workflow Job Retention Automatically delete completed workflow jobs (to save disk space) 	Entity Category Options for A Scope Start where	Account Workflow Workflow Organization Record is created Record is datus changes Record is assigned Record is dataget Record is destend	
---	---	---	--

4. For the 'Record fields Change' option, select all of the address fields to ensure the address is retrieved when any of the address fields is changed.

	Display Name 🔺	Name	Туре	
	Address 1: Shipping Method	address1_shippingmethod	Option Set	
1	Address 1: State/Province	address1_stateorprovince	Single Line of Text	
1	Address 1: Street 1	address1_line1	Single Line of Text	. 1
1	Address 1: Street 2	address1_line2	Single Line of Text	
1	Address 1: Street 3	address1_line3	Single Line of Text	
	Address 1: Telephone 2	address1_telephone2	Single Line of Text	
	Address 1: Telephone 3	address1_telephone3	Single Line of Text	
	Address 1: UPS Zone	address1_upszone	Single Line of Text	
	Address 1: UTC Offset	address1_utcoffset	Whole Number	
1	Address 1: ZIP/Postal Code	address1_postalcode	Single Line of Text	
	Address 2	address2_composite	Multiple Lines of Text	



5. Select the *Inogic.Maplytics.GetTimezone* workflow assembly from the Add step menu.

d Step 👻 🔤 📲 🖛 🖬 Insert 👻 🗙 Delete this step.	
Microsoft.Dynamics.Service.Workflows.Contr	٠ ـ
GetMyChangedSkills	•
Microsoft.Dynamics.Service.Workflows.Other	•
Estimates	•
Geofencing	•
Approvals	•
Dates	•
User Profile	•
Microsoft.Dynamics.Service.Workflows.Contr	•
Team member position accept	•
Microsoft.Crm.ActionCardRankingActivity	•
Gauge	•
Export Workflow	•
Microsoft.Dynamics.Marketing.MarketingList	>
nogic.Maplytics.GetTimezone (1.0.0.0)	•
Inogic.Maplytics.RelationshipCreateWork	is Manhetics GetTimezone (1000)

6. Click on *'Set Properties'* and set the address parameter as shown in below screenshot for the workflow assembly.

Show	N Process Properties
📑 Ada	d Step ▾ ⊒ੈ+≡Insert ▾ 🗙 Delete this step.
•	Set the address to get the timezone
	Inogic.Maplytics.GetTimezone (1.0.0.0):Inogic.Maplytics.GetTimezone.GetTimezone Set Properties

Process: Get Timez	cone ep Input Properties		Working on solution: Default Solutio
Property Name	Data Type Required	Value	Form Assistant Dynamic Values
Street1	Single Line of Text Optional	{Address 1: Street 1(Account)} 🗢	Dynamic Values
Street2	Single Line of Text Optional	{Address 1: Street 2(Account)} 🗢	Operator: Set to
Street3	Single Line of Text Optional		Look for:
City	Single Line of Text Optional	{Address 1: City(Account)}	(Deprecated) Traversed Path
StateOrProvince	Single Line of Text Optional	{Address 1: State/Province(Acc	Add
County	Single Line of Text Optional		
Country	Single Line of Text Optional	{Address 1: Country/Region(Ac ≑	
Zip/PostalCode	Single Line of Text Optional	{Address 1: ZIP/Postal Code(Ac 🗢	Default value:

Here, user needs to specify the address fields on the basis of which user wants to get the time zone. After this user needs to set the time zone in field (string type). Please follow below steps for the same:

- 1. Choose 'Update Record' from 'Add Step' menu after selecting 'Set Properties' record and select same entity for which workflow is being created.
- 2. Click on 'Set Properties' of the new record and in the update window set the TimezoneName, TimezoneAbbreviation to the output parameters returned by the workflow assembly.

Website	
Parent Account	Q
Ticker Symbol	
Relationship Type	•
Timezone Abbreviation	{TimezoneAbbreviatio
Timezone	{TimezoneName(Provi
Product Price List	Q

Once user finishes all the above steps and activates the workflow, user can run it on any record of the respective entity which has address data. This will provide set the time zone set for the record as shown below.

Summary Map Area of service Territories					
Relationship Type					
Timezone Abbreviation					
EST					
Timezone					
Eastern Standard Time					



Configure Driving Instructions workflow

- 7. Go to Setting > Processes > Click on 'New' to design a new Workflow Process.
- 8. Write Process name, choose 'Workflow' under category section and select desired entity as shown below;

Create Process Define a new proce actions, dialogs, and	ss, or create one from an existing template d workflows.	e. You can create four kinds (of processes: business process flows,
Process name: *	GetDirection		
Category: *	Workflow •	Entity: *	•
Run this workfl	ow in the background (recommended)	Account	
Type:	New blank process New process from an existing temp	late (select from list):	Account Project Price List Actual Account Actual Data Export (Deprecated)
Templat	te Name 个	Primary Entity	Address Agreement Agreement Booking Date
			Agreement Booking Incident Agreement Booking Product

9. Select 'Organization' under 'Scope' dropdown. Select 'Record is created' and 'Record fields change' options as shown below;

Process: Inogic.Maplyti	ics.GeoCoding		Working on solution
Common Common Audit History Process Sessions Process Sessions	General Administration Notes Hide Process Properties Process Name Activate As Process *	Entity Account Category Workflow	
	Available to Run Run this workflow in the background (recommended) As an on-demand process As a child process Workflow Job Retention Automatically delete completed workflow jobs (to save disk space)	Options for Automatic Processes Scope Organization Start where: Record is created Record status changes Record is assigned Record fields change View Record is deleted	¥.

10. For the 'Record fields Change' option, select all of the address fields to ensure the address is retrieved when any of the address fields is changed as shown below;

		monitor for changes		
	Display Name 🔺	Name	Туре	
	Address 1: Shipping Method	address1_shippingmethod	Option Set	-
1	Address 1: State/Province	address1_stateorprovince	Single Line of Text	
1	Address 1: Street 1	address1_line1	Single Line of Text	
1	Address 1: Street 2	address1_line2	Single Line of Text	
1	Address 1: Street 3	address1_line3	Single Line of Text	
	Address 1: Telephone 2	address1_telephone2	Single Line of Text	
	Address 1: Telephone 3	address1_telephone3	Single Line of Text	
	Address 1: UPS Zone	address1_upszone	Single Line of Text	
	Address 1: UTC Offset	address1_utcoffset	Whole Number	
1	Address 1: ZIP/Postal Code	address1_postalcode	Single Line of Text	
	Address 2	address2_composite	Multiple Lines of Text	

11. Select the *Inogic.Maplytics.DrivingInstructions* workflow assembly from the Add step menu as shown below;

Administration	NOTES		 	
Show Process Proper	ties			
Add Step 🗙 L 🔤	ert 🗸 🗙 Delete this sten		 	
Stage				
Check Condition		_		
Conditional Branc	h			
Default Action				
Wait Condition				
Parallel Wait Brand	ch			
Create Record		- 1		
Update Record		- 1		
Assign Record		- 1		
Send Email		- 1		
Start Child Workfle	ow	- 1		
Perform Action				
Change Status				
Stop Workflow				
Inogic.Maplytics.A	ssignTerritoryWorkflow (1.			
Inogic.Maplytics.B	ulkGeoGraphies (1.0.0.0)	•		
Inonic Manlytics G	eocodina (5.4.0.4)			

12. Click on 'Set Properties' and set the address parameter as shown in below screenshot for the workflow assembly;



Process: GetDirecti	Working on solution: Default Solution		
Property Name	Data Type Required	Value	Form Assistant
FromAddress	Single Line of Text Required	{Address 1: Street 1(Account)} { 🗘	Dynamic Values
ToAddress	Single Line of Text Required	{Address 1: Street 1(Primary Co 🗘	Operator:
TravelMode	Single Line of Text Optional	Driving	Look for:
DistanceUnit	Single Line of Text Optional	Mile	Address 1
			Add

In **'FromAddress':** Select the address fields of the entity that you want the direction **'From'**. Select the all address field i.e. Steet1, Street2, and City etc. and ensure sure you keep space between two fields.

{Address 1: Street 1(Account)} {Address 1: Street 2(Account)} {Address 1: City(Account)} {Address 1: State/Province(Account)}

In **ToAddress:** Select the address fields of the entity that you want the directions **'To'**. Select the all address field i.e. Steet1, Street2, and City etc. and ensure to keep space between two fields.

Travel Mode: Select the Travel mode. For example (Driving, Walking, Transit). If you do not specify the Travel mode then it will take Driving mode by default.

Distance Unit: Select the Distance unit. For example (Mile or mi, Kilometer or km). If you do not specify the unit then it will take Kilometer as default unit.

13. Click on add step -> Send Email -> Click on set property

PowerApps	프, 📔 💭 Activate – 🕼 Convert to a background workflow – 🖏 Show Dependencies 🍌 Actions -	@ Help -
Process: Dire ction		Working on solution: Default Solution
 ✓ Common ☑. Information ☑. Audit History ✓ Process Sessions ☑. Process Sessions 	General Administration Notes Add Step < 3/= "Insert < Delete this step. Stage Stage Oneck Condition Conditional Branch Default Action Default Action Create Record Update Record Assign Record Start Child Workflow Send Email Start Child Workflow Send Email Stape Status Stop Workflow Adixtudio Xmn.Plugins (80.0.2) Adixtudio Xmn.Plugins (80.0.2) Portais Adixtudio Azure Storage Utilities Adixtudio Azure Storage Utilities Adixtudio Azure Storage Utilities	

Click on Email body -> Select Look for -> local value "inogic.Maplytics.DrivingInstructions. DrivingInstruction"

•	Email: New Email - Microsoft Dynamics	365 - Google Chrome	- • ×	? 📧
https://map20	8.crm.dynamics.com/SFA/Workflow/entityform.aspx?activityname=CreateStep2&entity	yFullName=email&entityname=email&stepId=	CreateStep2&workflowId=5ffad3a5-d	
File Save and	d Close		<u> </u>	
Process: Dire Create Em	ction ail			
From		📓 🕅 🗙 🍕 💽 🛛 More Actions 🗸	Form Assistant	
То	(Account(Registration Processi))	File Name ↑	Dynamic Values Dynamic Values	
Cc	a		Operator:	
Bcc			Set to 🔻	
Subject		4	Look for: Inogic.Maplytics.DrivingInstruction	
K Re (B)	ル Ψ ■ ■ ■ □ □ □ □ □ □ □ □ □ □ □ ■ ●	0 - 0 of 0 (0 selected) 🔰 🖣 P	age Related Entities Related Entities Recont (Account) Created by (User) Created by (User) Currency (Currency) Modified by (Delegate) (User) Modified by (User) Owning Eusines Unit (User) Dowing User (User) Local Values Ingo (Mary/Ics.Dhunginstructors.Dr Process	Vinginstruct
Regarding				
Duration	×			

Select DrivingInstruction for plan text or DrivingInstructionHTML for html page. Click on save and close.



14. The driving instructions will be returned both in HTML and Plain Text format as an output parameter to this workflow. User can use either of them. For example we have used HTML formatted direction instruction in Email here.

From Address: T NW 50th Ln Ocala FL 34462 USA		1
To Address: 4350 US-98 Frostproof FL 33843 USA		1
Total Travel Distance: 208.45 miles		1
Total Travel Duration: 3 hrs 25 min		٦
Instruction	Distance	
Depart NW 50th Ln toward NW 115th Ave	0.707	٦
Turn right onto NW 115th Ave	0.613	1
Turn right onto NW Highway 464B / CR-464B	1.692	1
Keep straight onto NW 110th Ave	0.127	1
Turn right onto US-27 S / SR-500 S	11.539	1
Take ramp right for 1-75 South toward Tampa	40.409	1
At exit 328, take ramp left for Florida's Turnpike South toward Orlando / Turnpike	30.912	1
At exit 289, take ramp right for US-27 toward Cleremont / Taveres	70.493	1
Turn left onto W Main St / CR-17	2.715	1
Turn right onto 10th St N	0.163	1
Road name changes to US-27 ALT / SR-17 / 10th St S	9.455	1
Turn left to stay on US-27 ALT / SR-17 / E Main St	18.945	1
At roundabout, take 2nd exit	16.91	1
Bear right onto McLeod Rd	0.353	1
Keep straight onto N Palm Ave	1.992	٦
Turn left onto W 1st St	0.202	٦
Arrive at Frostproof, FL	0	1

Maplytics Batch Processing Tool

The workflows for Geocoding and Territory Assignment designed can be used on a day-to-day basis for addresses that are changed or added occasionally. However, for bulk geocoding/territory assignment on data, we recommend using the Batch Processing tool. This tool ensures that the bulk geocoding on records is handled in single batch. While in the territory assignment, this tool helps to assign the respective territories to all the selected records based on their Latitude and Longitude values.

Note: To run this tool, the user needs to make sure that machine has Microsoft .net framework 4.0 and Maplytics installed in Dynamics CRM.

To run the tool, Extract the Batch Processing tool .zip file and run the **BatchProcessingTool** application.

Name	Туре	Compressed size
BatchProcessingTool	Application	104 KB
BatchProcessingTool.exe	XML Configuration File	1 KB
Microsoft.Crm.Sdk.Proxy.dll	Application extension	58 KB
Microsoft.IdentityModel.dll	Application extension	360 KB
Microsoft.Xrm.Sdk.dll	Application extension	146 KB

Executing Batch Processing Tool

Connection Details:

Please enter the CRM details on this screen. The users have to enter the following details:

Deployment Type: The user can select either of the options given in below screenshot depending on their deployment.

Office365

Show Advanced: The user can select the Online Region and proceed to enter the 'Username' and the 'Password'

Organization: The organization list will be auto-populated with the organizations available in CRM on selecting the checkbox. Select the organization for which Maplytics is to be or already has been installed.

Username: Username of a valid CRM user. For example: <u>mollyc@mollyc.onmicrosoft.com</u> **Password**: Password of CRM user

On-premises

Server: Please enter the server url of CRM. For example, http://<servername>:<port> or https://<orgname>.crm.dynamics.com

Organization:

When the user enters the server URL in case of **On-Premises** deployment model, the organization list will be auto-populated with the organizations available in CRM on selecting the checkbox. Select the organization for which Maplytics is to be or already has been installed.

Username: Username of a valid CRM user. For example: <u>mollyc@mollyc.onmicrosoft.com</u> **Password**: Password of CRM user



Maplytics™ – User Manual

Login	
Deployment Type:	On-premises Office 365
Sign in as cu	irrent user
Display list o	of available organizations
Show Advan	iced
Advanced	
Online Region	North America 🗸
User Name	
Password	•••••



Login		
Deployment Type:	• On-premises Office 365	
Server	mag dau@ausausausiausaaft aam	
Port	Use SSL	
Authentication Source:	Active Directory ~	
	Sign in as current user	
User Name		
Password	•••••	
Domain		
Display list of available	organizations	

Make A Selection: Here, the user can make selection whether they would like to run this tool for Geocoding (Batch Geocode) or Territory Assignment. The third option is available for installing/ uninstalling Territory Distribution Windows Service. In this example, we have chosen Batch Geocode as shown below:





Choose Entity and Filtering:

Please find the details of the same below:

- Entity: Select the entities on which the user would like to run this tool.
- Views: Once the user selects the entity, all the views defined for this entity are populated in the list of views. Select the required view.

The plus sign can be clicked upon to add more entities and views. The check box at the bottom allows the records to be shared with the user, if required.

Non-Geo coded Records have a separate view 'Non Geocode' for Batch Geocoding for all the Entities. All the non-geo coded records of multiple entities can be processed together.



Entity Contact	 Views Select View 		~	\oplus
Entity Name	View Name			
Account	All Accounts	e)	
Contact	All Contacts		e)

Users can enter the email address, if the they would like the job results to be mailed to them.



	Maplytics - Batch Processing Tool - 3.0.0.1	
Make A Selection	> Choose Entity And Filtering > Processing > Result	
Entity Contact	Views Select View	· (+)
Entity Name	View Name	
Account	All Accounts	Θ
Contact	All Contacts	Θ
✓ Let someone kno	W	
crm@inogic.com		

The user can go back to the previous stage while in the 'Make A Selection' and ' Choose Entity And Filtering' stages of the process. Returning from Processing and Result stage is not possible.

Processing:

In this section, the user can see the progress of the geocoding process. User can quit the process anytime by clicking on the option at the bottom.





Note: The Batch Processing Tool takes time to process based on the number of records selected. Please do not close the window until this process is completed.



Record Summary:

Geocoding:

Bing Status: This shows the number of the records for which the geocoding from Bing maps was a success or a failure.

CRM Status: This shows the number of the records for which the updation of geocordinates (Latitude & Longitude) to the respective CRM records was a succes or a failure.

After completing the geocoding process, the user can download the results. The results will be downloaded in Excel format. User can check the columns of CRMDescription and BingDescription in the result to check the reason for failure of processes on the records.

With the options at the bottom, the user can return home, download the result in an Excel format, or exit the process.

Bing Status		Total proces	ssed records: 2102
Entity	View Name	Successes	Failures
Account	All Accounts	1083	0
Contact	All Contacts	1019	0
Entity	View Name	Successes	Failures
Entry	All Accounts	1083	0
Account			

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Territory assignment:

CRM Status: This shows the number of the records for which the updation of Territories for the respective CRM records was a success or failure.

Nake A Selection >	Choose Entity And Filtering	> Processing	> Result	
Record Summary			Total Proces	sed Records : 1083
Entity	View Name		Successes	Failures
Account All Accounts			1037	0

Note:

- 1. The Non Geocode records can be processed in a separate view for all the Entities
- 2. Non Geocode View is not applicable for Territory Assignment while running the Batch processing tool

Territory Assignment Rule

Users can use this feature to create rules for assigning territories or owner to the CRM records as per the requirement. With creating a rule user can set some conditions based on which the territories or the owners will be assigned to only those records which satisfy the conditions provided.

Enable Territory Assignment Rule

To enable the Territory Assignment Rule, *go to Maplytics App > Settings> Map Configuration Details > Default Configuration Detail record (the one with no user)> Advance Settings > Enable Territory Assignment Rule* and select the checkbox to enable using the feature. The feature will be disabled by default.

laplyti Iap Confi	CS guration Details							
eneral	Advance Setting	s Check-In	Auto Scheduling	Real-Tim	e Tracking	Related		
Configu	ure option							
Enabl Dista	le Travel nce		Enable Tru	ick Route			Map in New Window	C
			Enable Ter	ritory			Enable Multiple	

Once this feature is enabled, they will be able to see a new tab of Territory Assignment Rule in the Entity Maps. For an instance, the screenshot below shows the Entity map of Accounts.

ccoun ntity Map	t						
ieneral	Entity View Configuration	Attribute Mappings	Tooltip Mapping	Territory Assignmen	t Rules		
					+	New Maplytics Assign	
~	Name \uparrow \checkmark		Created On \vee		Priority		
	Accounts by Revenue		4/29/2021 7:	22 PM			1

Creating Territory Assignment Rule

To create a new rule, click on **New**. The user will be able to see the window for a New Rule.

General

In the 'General' tab, user can enter the name for the rule and select the entity for which the rule is being created.

Accounts by Rever Maplytics Assignment Rul	nue e	
General Assignment	Rule	Related
Name	*	Accounts by Revenue
Entity Map	×	account

Assignment query

Here, the user can find the various options as explained below to set the conditions required within the rule:

eral Assignment	Rule Related
Assign Owner	⊙ 🎗 Robert K
Assign Territory	🖽 AU - NSW
Location agnostic	
Query Mode	* Simple
View	Active Accounts
Order	1

Assign Owner: Select the user who should be assigned as the owner to the records.

Assign Territory: Select territory which should be assigned to the records. If users want to assign only the owner to the records, they can leave this blank.

Location Agnostic: This option will be visible only when a territory is selected in the Assign Territory field. It will be deselected by default and will have an effect on the assignment of the territories and owners as explained below.

- Not selected If the option of Location agnostic is not selected, the selected territory and the
 owner will be assigned to only those records which satisfy the query and also lie within that
 selected territory based on the respective latitude or longitude values of the records. For example,
 a territory for Staten Island has been selected and the condition in the query says, Accounts with
 Annual revenue greater than 100K USD, then Staten Island territory and the selected owner will
 be assigned to only those records which have annual revenue greater than 100K as well as they
 lie within Staten Island based on the latitude and longitude values of the records.
- Selected: If the option of Location agnostic is selected, then the selected territory and the owner will be assigned to all the records from the selected view that satisfy the query irrespective of the latitude and longitude values of the records. For example, a territory for Staten Island has been selected and the condition in the query says, Accounts with Annual revenue greater than 100K USD, then Staten Island territory and the selected owner will be assigned to all the Accounts from the selected view which have annual revenue greater than 100K, even if they lie outside the Staten island based on the latitude and longitude values of the records.

Query Mode: There are two Query Modes:

• Simple: If query mode is selected as Simple then it will show all the system views. User can select a System view to consider the respective records.

Accoun Maplytics	its by Reve Assignment Ru	enue ^{Ile}	
General	Assignmen	t Rule Related	
Assig	gn Owner	⊙ 🎗 Robert K	
Assig	gn Territory	🖽 AU - NSW	
Loca	tion agnostic		
Quer	ry Mode	* Simple	
View		Active Accounts	
Orde	er	1	

• Advanced: If query mode is selected as **Advanced**, the user can put the required Fetch xml in the field as shown in the below screenshot.

eneral	Assignmen	t Rule Related
Assig	ın Owner	⊙ 🎗 Robert K
Assig	In Territory	🖽 AU - NSW
Locat	tion agnostic	
Quer	y Mode	* Advanced
Fetch	1 XML	<attribute name="accountid"></attribute> <order <="" attribute="name" td=""></order>
Orde	r	1

To create a Fetch XML query, go to Advanced find > Select the entity and the required filters > Download Fetch XML

			Microsoft Dynamics 365
FILE ADVANCED F	ND		
Query Saved Views Result	Save As Save As ✓ Edit Columns ✓ Edit Properties	Image: Clear [€ Group AND Clear [€ Group OR Image: Clear Image: Clear	Download Fetch
Show	View	Query	Debug
Look for: Accounts			✓ Use Saved View: [new]
✓ Annual Revenue	Is Greater Than	100,000.00	
Select			

Priority: If multiple Territory Assignment Rules are created and while assigning territories a record satisfies more than one rules then this field will decide the priority of the rules to be run and assigned among the list of rules. Where 1 is the highest priority and the priority keeps decreasing as we go to a higher number. Let's say three Territory Assignment rules are created with the priorities given as 1, 2 and 3. While assigning territories, if a record satisfies all the three rules, then first, it will check the priority of those three rules and 1 being the highest priority, the respective territory and the owner will be assigned to the record as per the Territory assignment rule with Priority 1.

ntity Map	t					
General	Entity View Configuration	Attribute Mappings	Tooltip Mapping	Territory Assignment	Rules	
					+	New Maplytics Assign
~	Name ↑ ∨		Created On \vee		Priority	~
	Accounts by Revenue		4/29/2021 7	:22 PM		1
	Alabama - USA		4/29/2021 7	:39 PM		3
	Industry		4/29/2021 7	:37 PM		2

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Override Existing Territory

The Maplytics admin or the System admin can use this feature for the respective entities to decide whether the existing territory(ies) will be overwritten or not while assigning territories to the records.

To use this, first create a field with data type 'Boolean' on required entity form for Override territory. Here users can set it to be 'Yes' or 'No'. By default, this field has already been created for Accounts, which can be added to the form. This option will be set as null by default.

Once the field is added to the required entity, Maplytics admin or System admin can *go to Maplytics App* > Settings > Entity map > Open entity map for required entity > Attribute Mappings > Override Territory > Select the field that was added on the entity form.

account Entity Map	:							
General	Attribute Map	opings	Tooltip Mapping	Category Configura	ation	Configuration	Advanced Settings	Related
City		Address	: 1: City		Latit	ude	Address 1: Latitude	
Count	ty				Long	gitude	Address 1: Longitude	
Phone	2				Web	site		
Email					Lanc	d Area Mapping		
Territo	ory Relationship	Accoun	t - Territory		Over	rride Territory	Override Territory	

Based on the value of the 'Override territory' field in the record, it will be decided whether the existing territory(ies) will be overwritten or not while assigning territories to the respective records.

- If the Override territory field is set as 'Yes' then while assigning territories, if there are any territory(ies) already assigned to the respective records, then those will be overwritten and replaced by the new territory(ies) that are being assigned.
- If the Override territory field is set as 'No', then while assigning territories, if there are any territory(ies) already assigned to the respective records, then those will remain as it is and no new territories will be assigned.
- If Override territory field is set as 'No', then while assigning territories, if there is no territory is assigned to the respective records, then it will assign the new territory(ies).

Maplytics – Tablet / Mobile

For Dynamics 365 v9.x, Maplytics can be accessed from mobile and tablets as well. Users can use the Dynamics 365 App for Phones and Tablets, Dynamics 365 Sales App or Dynamics 365 field service app to Access Maplytics into Mobiles and Tablets. Users can use the 'Detail Map', 'Heat Map' and 'Map' buttons and the dashboards to access Maplytics into their devices.

Mobile

Tablet

Clicking on the 'More' option within the Entity Menu slides up the following options.

/		=	≡					<i>ب</i> حر
My /	Active Accounts 🗸		My A	Active Accoun	ts ~			
							Filter by keyword	
	Hilter by keyword		~	Address 1: 🗸	Annual Rev \vee	Account Name 🕆 🗸	Main Phone 🗸	Primary Contac
↑ sc	rt by Account Name			Redmond	\$15,000,00	A Datum Corporation	425-555-0182	
				Denver	\$50,000,00	A Datum Fabrication	303-555-0134	
				Austin	\$890,000.00	A Datum Integration	512-555-0163	
Q				Guangzhou Staten Isla	\$1,000,000	A Datum	-4481	
Assist	ant			Staten Isla	\$78.895.00	A WIESLAWA JASIULEWICZ & SONS	4464667	
+	New			Ciston Isla	\$727.607.00		11072010042	
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\square	Flow		Ŋ	Email a Link				
₽	Excel Templates		∞ #	Flow Excel Templates				
XĮ	Export to Excel		X	Export to Excel				
53	Quick Campaign		\$	Quick Campaigr	1			
5	daior cambalan		•	Open Dashboar	ds			

A click on the Maplytics menu above opens a modal window with an option for Detail Map and Heat Map

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≡							ト へ
My	Act	ive Accoun	ts ∽				
						Filter by keyword	
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		Denver	\$50,000,00	A Datum Fabricatio	n	303-555-0134	
		Austin	\$890,000.00	A Datum Integratio	n	512-555-0163	
		Guangzhou	\$1,000,000	A. Datum		-4481	
		Staten Isla	\$200,000.00	A. DINA VEDMED 8	& SONS	4464667	
		Staten Isla	\$78,895.00	A. WIESLAWA JASI	ULEWICZ & SONS	41597729267	
				Maplyti	cs		
	3	Detail Map					
	3	Heat Map					- 11
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		Tampa	\$750,000.00	Adventure Works E	lectronics	305-555-0118	Brandie Diaz
		New York	\$2,000,000	Adventure Works E	ingineering	917-555-0127	Eva Colon
		Tampa	\$5,000,000	Adventure Works I	nstrumentation	813-555-0127	Consuelo Mo
		Pittsburgh	\$2,000,000	Adventure Works I	ntegration	412-555-0145	Pearlie Black
		Staten Isla	\$378,729.00	Aguayza & Sons		2123082665	
		Staten Isla	\$898,196.00	Aiello & Sons		2128165282	
		Vienna	\$483,000,0	Alpine Ski House		-12303	
ABC	1 -	50 of 637					
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Maplytics	Assistant
Deactivate	Deactivate
Connect	PS Connect
Connect	Add to Marketing List
Add to Marketing List	Assign
Assign	다양 Email a Link
Email a Link	Delete
	Refresh
Delete	
Refresh	Geo Code
Check Access	s¦∕r Follow
2	∑ Flow

Within an individual account entity, a click on the Maplytics menu opens a modal window with an option for Map and Check-in



<	+
A. Datum	
Account	
Annual Revenue \$1,000,000,000.00	\sim
Number of Employees 12,000	
Owner sam map	
Summary Details Project Price Lists	s Map
ACCOUNT INFORMATION	
Account Name*	
Maplytics	
發 Мар	
O Check-In	
Fax	
86-23-4444-101	
Website	
http://www.adatum.com	•
Parent Account	
	Q
	\odot
Save Save & Close New	More

<				Q	+
Adventure Works					
Account					
\$67,000,000.00 675 Annual Revenue Number of Employ	yees Owner	\checkmark			
Summary Details Proje	ct Price Lists	Map Tab Files	Route on Map	Assets	and
ACCOUNT INFORMATION		Timeline	+ 7 i	= :	
Account Name*					
Adventure Works		✓ Search timeline			
Phone		Enter a note		0	
812-555-0175	S				
Fav		SM Modified on: 5/30	0/2023 12:32 PM		
	Ν	Maplytics			
🐼 Мар					
O Check-In					
Parent Account					
	Q				
Relationship Type					
Customer					
Product Price List					
	Q				
Ticker Symbol					
neker Symbol					
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ContextSearch		+	(•	···)	

Brady Hannon	\mathbb{E} \times
🚽 Save 🖞 Save & Close	e + New :
← Back ♂ Map	Fi
CONTACT INFORMATION	
First Name	Brady
Last Name *	Hannon
Job Title	
Account Name	P
Email	brady_hannon 🖙
Business Phone	
Mobile Phone	
Fax	
Preferred Method of Contact	Any
Address 1: Street 1	333 Pontius Ave N



Detail Map

The Detail map consists of the following components. There are five ways to plot the data on Map, similar to the Detail Map on desktop:

- By Location
- By Region
- By Drawing
- By Territory
- By Template



Proximity

Enter the radius for the proximity search. The Proximity can be provided in either Miles or Kilometers.



Concentric Proximity Search


Category Filter



User can categorize the data on the basis of an attribute of the Entity



Current Location

This is used in combination with Proximity to specify the center point for the proximity search. By default, this field displays the address stored in the Maplytics Personalized record of the logged in user.

Set GPS Location as the current location

The user can also locate the GPS location of phone/tablet devices using 🧿 button.



GPS location is represented by 'Blue' circle on the map. It will automatically update the user's current location, making it easier to perform proximity (Near-Me) searches.

Note: Please ensure the following points for the GPS functionality to work:

- Provide 'Location' permission to Dynamics 365 App in phone / tablet device
- GPS location is turned ON of respective devices
- 'User Content and Location' is tuned ON in Dynamics 365 App

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Tooltip Card

Every Pushpin will display the record name, address, as well as the contextual data defined in the tooltip section of the Maplytics Configuration when double clicked on the record. The user can open the record, check-in/out and perform other actions using the available quick actions button.



Contextual Menu

To get a contextual menu on the map, long press anywhere on the map. Pushpin Contextual menu provides the following additional options. These option provides commonly used features in Maplytics like Set as Current Location, Origin, and Adding to Route, etc.

	Layer Menu		TUD	OR AREA
Tigh Rock Caroline And	Plot Records X	Ted Stevens		
	🙁 🗶 🗶 🖽 日	Anchorage Arrange		
Gan Cyd	Filter		Server and Ser	Ð
Create New Record Og Create New Record Set As Organ New Add To Route Set As Destination	Current Location	SAND LAKE	Open Record	٢
Be Set As Current Location Set As POIL Location Set As POIL Location	Proximity		Directions	Set As Origin
and the second s	Distance Time Miles		Add To Route	Set As Destination
	Show Travel Distance	PROPERTY AND	Set As Current Location	Ruth Arcand
Hylan Plaza		Margine 1	Set As POI Location	
The state of the s	DataSource	BAYSH	Actions	
Too see the second	Select Datasource		Save Settings	. Kaseliant
Directions Search	g	🗐 View Data	Show Territory	1 miles 1 km

Set As Origin:

Selecting this option will set the address of the pushpin as the start location of the route.

Set As Destination:

Selecting this option will set the address of the pushpin as the end location of the route.

Add to Route:

This option will set the address of the pushpin as a middle waypoint of the selected route. For example, if the users already have Point A and Point B selected as their route, and click on the *Add To Route* option, then the Point B will become Point C, and the address of the selected pushpin will become the Point B of their route.

Set As Current Location:

This option is used to set the address of the pushpin as the current location, which can be used for proximity search. For example, if the user wants to plot all the leads that are within a radius of 100 miles from a particular record then the user can click on the **Set As Current Location** option to set the address as the current location and then the user can plot the records around this location.

This option also removes the additional step to type the current location manually for the proximity search.

Set As POI Location:

This option helps the user to set the center point for the Point of Interest (POI) searches like ATMs, restaurants, Airports, etc. Once this location is set as the POI location, the user can search for different POI around this location. User can choose the icons or the locations from the list of 'others' or enter a keyword to search for the respective POI locations on the map.



Save Template:

User can save the plotted search criteria as a template, so as to open the template directly instead of searching on the map again.

Maphylics - Detail Map E ×	Space Camp, Huntsville, Alabar Proximity Distance Time 2 Miles *	University Dr. Nov inbow untain index Court The Tomplete	Rutledge Heights
Control of the second sec	DataSource Select Datasource Account Accounts - + Select Category	Add to existing template Create new template Proximity - 2 miles Access Level Personal	Somit Place
ere	Overlay	Madison Acadomy Acadomy Acadomy The Manual Acadomy The Week Data	Gardens Bab Wattab Are Str Huntsville Park 500 feer 1 im 0 2021 TonTom, 0 2021 Merosoft Babadian Tems

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Search Record

After plotting of records, particular record can be searched by typing the primary attribute and getting prompts for records.



The selected record gets highlighted and zoomed. The zoom level gets set accordingly.



Data Grid

The plotted records are visible in the Data Grid at the bottom of the screen. They could be filtered out by adding appropriate keywords in the 'Filter by keyword' bar. Mass Actions can be performed on the selected records in the grid.





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Routing – Tablet / Mobile

Another essential feature of Maplytics is Routing across multiple waypoints. Using the Contextual Menu options explained above, the users can add multiple waypoints to their journey. At given point in time, the users can add *maximum 25 waypoints in direction*.



Once multiple waypoints have been added, click on *Go* button to bring up the Routing Screen shown below.



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🚱 maplytics.

Unified View for Route and Records

When the user plots the data and then creates a route, both the plotted data and the route will stay on the map. This makes it easy for the user to add more waypoints to the route without switching between Plot and Directions card. The route can be cleared using the 'Clear Route' button.



Save Route and Plot Saved Routes

Users can now save the route from the Dynamics 365 App for Phones and Tablets and later use the 'Open Saved Route' feature to plot the saved routes.

Mapiytics - Detail Map 🔅 ×	<u>®</u> 1	Layer Menu	Talladeya
0	_& F	Plot Records	Tuscadora
	28 [Directions	Save The Route X
Save The Route X			Add to existing route
Add to existing route	Ca	Options ~	Create new route ★
Today's Product Demos			Today's product demos
Select route date * SAD		≘ 🙆 Genaral Manager: 95 W. 3rd St. CR	Select route date * Coumbus
2822-09-23 III Owner	don	≡ B Owner: 205 State Highway 21 S LC	2021-04-26
Joe Smith	Nat	E Director: 1629 W Highland Ave DA	Owner
Save		E D Genaral Manager: RR 3 Box 54b PE	Joe Smith
S Ocean DAKY		E Staff Member: 10501 Highway 5 B	
TAUYEUNG & SONS. TV AT REININGION DEET Staten Island NY 10308 USA	-cc	Add destination	Save
Great Kills		C Leave now Go	Jackon Moniper Emotreen
P+ R Directions Dearth	b Bing	Hattiesburg	Pierre View Data Andalusia Pierre 2021 Tom/or User Andreas Contractor States St



Along the Route Search

The user can also search the along the route records the same way as on the Browser.



🚱 maplytics.

Route Redirect and Copy Navigation Links

Redirect with Google Maps



Redirect with Waze



Redirect with Apple Maps





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Page 336 of 340

Heat Map - Tablet / Mobile

For Dynamics 365 v9.x, Maplytics can also from the Entity homepage and entity form using 'Heat Map'. When clicked on Heat Map button, it opens the heat map.



Summary card



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Pie chart in Heat Map



Column chart in Heat Map



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Dashboards - Tablet / Mobile

The users can define their Dashboard views for Maplytics and include them as web resources in standard Dynamics CRM Dashboards. Maplytics ships with 6 pre-defined Dashboards for various Sales and Service Modules for different user roles.



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