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USER MANUAL



MappyField 365

"MapView & Functionalities"

Version: 7.1

Compatibility:

Dynamics 365 Online or PowerApps (Dataverse)



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Introduction

MappyField 365 Dynamics CRM plugin provides geo-analytical solutions to CRM users and helps them to plot CRM data in maps. It lets users choose an entity of CRM, or custom view to plot all individual records from that entity on the map. You can map multiple entities, address related to customer entities at a time. Also, you can save different user preferences as such map configurations, zoom levels, and views for future references.

In this user manual, we have explained the Map view features and functionality of MappyField 365.

The installation, activation, and configurations of the MappyField 365 are explained in the separate user manual "MappyField 365- Installation & General Configuration.

Compatibility

• Microsoft Dynamics 365 (Online and Dataverse)

Prerequisites

Following requirement must be followed before starting the Plugin installation:

- You should be logged into Dynamics 365 Online or Dataverse.
- You have to generate **Google Map API key** for Google maps <u>How to generate Google Map API Key?</u>
- You have to generate Azure Map API key for Azure maps How to generate Azure Map API Key?



Map View

• Select the MappyField 365 from the Dynamics 365 dashboard or app list from header.



By clicking on the MappyField 365, you will navigate to the Map view of the MappyField 365 with all default configurations and all the entities which are already configured in Entity To Map.



Azure Map

Map view & its options

- You can plot the Entity records and perform the different actions and activities from the Map.
- Map view options:
 - You can plot the Entity records and perform the different actions and activities from the Map.
 - Map view options:
- 1. MappyField 365 navigation pane for Azure Maps and Google Maps.
- 2. You will have six tabs (options) to view and search the records by selecting the fields and options:
- -> Plot ->Plot External Data -> Route -> Templates -> User Tracking -> POI (Point of Interest)
- 3. There are three Quick Navigations provided:
 ->Calendar View -> MappyField 365 Configurations (default setup).
- -> Search \mathbf{Q} a specific record/location,

Note: You need to contact us in order to access the Live Tracking feature.

- 4. The options are:
- -> Default Location 义 address details as per the 'Map Configuration Detail'
- -> Full View of MappyField 365 map.
- 5. Refresh 📀 the MappyField 365 map.
- 6. Change the Area to display Configuration and Dashboards.





Default Location

• You will get the default location with the pin $\stackrel{\bigvee}{\sim}$ on the map as per the configuration in Map Configuration Detail.



- You can set the **default location** from the Map by right-clicking on your specific location.
- As you right-clicked, the map view options will appear. Click on Save Settings 🛛 Default Location.





• By clicking on the 'Default Location', the pushpin Set the default location will be changed with a **new** address on the map.





Plot the records on Map

Select Entity

• By clicking on the **Plot**, you can plot the multiple records by selecting the different entities.



First, select Entity from the 'Select Entity' dropdown option. You will get the dropdown list of entities as per mapped in Entity Mappings configuration.

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• Select **View** from the 'Select Entity' dropdown option.



			Select View	
		S	Accounts Being Followed	
			Accounts I Follow	
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Taras				
19				
~ <u>~</u>				Search

• After selection of 'Entity' and its 'View', you can Filter the attributes and plot the specific records of the selected attributes from the **Filter** option.

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• By clicking on the **T** 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.



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AV		+ Add Legend				A Start	A.	
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			Business Type Category Preferred Method o	of Contact				
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<u>Note</u>: You can plot the records on the map based on the attribute selection that are configured from the option of the 'Entity Mappings' in the Data Filter Attributes option.

• Once you have selected the Attribute, you need to insert its value. After selecting the attribute and inserting its relevant value to filter the records, click on the **Save** button.

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• By clicking on the **T** 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.



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- By using the custom filters, the DynamicsCRM users can plot records between the dates or plot records with the specific status as per configuration in the **Data Filter Attributes** option from Entity Mappings.
- Now, click on **Search** button to plot and view the records of the selected entity **on the map**.
- All the records of the 'Accounts' are plotted on the Map which is highlighted in the red pushpin \heartsuit



• In this way, you can plot the records by selecting the **Entity** and its attribute in the **View**. The records will be plotted as per the filtered attributed as you have selected the Filter option for the Entity.



- The multiple entities selection option is also given to plot and view the **multiple records** on the map.
- To select another 'Entity', click on + Add Legend text caption. As you click on it, the "Select Entity" option will be added.

Plot	×
Select Entity ○ Cluster ♥ ~ Accounts ~ All Accounts ~ ▼ (※)	Search Options:
	Search

• Now, select another **Entity** and select its **View** then click on **Search** button. You can also filter the attributes of the selected entity to plot the records on the map.

Plot		×
Select Entity	O Cluster	Search Options:
♥ ✓ Accounts ✓ All Accounts ✓	▼ ⊗	Select ~
♥ Contacts ∨ All Contacts ∨	▼ ⊗	
+ Add Legend		
		Search

- You can plot the records by selecting multiple entities, but you can select a maximum of **5 Entities** at a time.
- On selection of more than one entity, pins with different colors ? get plotted based on the records of entities. On map, Accounts are plotted in red pin ? and Leads are plotted in green pin ?.





 If entities like Account, Contact or Lead are mapped under the 'Entity Mappings' configuration, only then you can select those entities and plot the records on the map.

The Sales Reps/Executive (DynamicsCRM Users) can also access the MappyField 3365 from the mobile/tab.





Pin selection for records

- Every time when you add a new entity the pin will be added with a different color.
- Multiple pin **9** options are also available to differentiate multiple entity (legend) records, options will be listed by clicking on the existing pin.
- You can change the pin color and its shape by clicking on the pin \heartsuit of any entity. Select different pins for the multiple entities to differentiate the records on the map.

Plot			×
Selec	t Entity	⊖ Cluster	Search Options:
	Accounts	✓ All Accounts ✓ ▼ ⊗	Select ~
•~	Contacts	✓ All Contacts ✓ ▼ ⊗	
	• •		
9	 		
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• You can also add your custom pushpin icon by clicking on the plus + icon. You need to select the SVG file.

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Pacific C	Select Entity Accounts Contacts	Note: The selected file should be SVG and height and wis should be 30 px and 20 px respectively. Download SVG Example	dth of the svg		~	
		Choose File	Upload			
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		4				



Cluster Map Records

• For all the pins added on the map, there is an option available to cluster them.

Plot							×
Select Entity				O Clu	uster	Search Options:	
♥ ✓ Accounts	~	All Accounts	~		⊗	Select	~
+ Add Legend							
							Search

• By selecting the Cluster option, the pins will get clustered based on the proximity. It will make a group of nearby pins indicating the number of markers.



Note:

- On zooming in to the map, the number of pins in the cluster decreases and you get to see individual markers on map.
- Whereas, when zoomed out, it consolidates the markers into clusters again.







• On clicking any cluster (no. of groups), it will show all the pins in spider cluster form.





Plot External Data



In order to plot data through external records, navigate to the Plot External Data section.

Here, you will be able to download a Sample CSV file.

Plot External Data	×
Select File: (i) Choose File Sample CSV File	Upload
	Search

Within this sample file, you can enter the details as per your requirements. Also, you need to make sure that the title of each column should remain unchanged.

	Α	В	С	D	E	F	G	н	1 I I	J	К	L	М	N	0	Р	Q	
1	Record Na	Latitude	Longitude	Street1	Street2	City	PostalCod	State	Country	Job type	Company	Education	Email	URL	Phone Nu	Status		
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3	Adam Smi	45.36	-68.97	3309 Espe	eranza Cros	Austin	78758	ТХ	USA	Teach Lea	Biztech	MBA	Test@gma	www.goo	9.43E+09	FALSE		
4	Jack Carte	44.18	-84.5	3000 Bayp	oort Dr	Tampa	330607	FL	United Sta	Senior De	Test	MCA	Test@gma	www.goo	9.33E+09	TRUE		
5	james san	32.65906	-96.7638	3456 B So	ι 1200 mair	Dallas	75073	Texas	United Sta	Manager	Test 12	MBA	james@gr	nail.com	8.96E+09	FALSE		
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7																		
8																		
9																		
10																		

File can be uploaded by clicking on the Choose File button.



	Search
Sample CSV File	
Sample (38).csv	Upload
Plot External Data	×

Once the Upload button is clicked upon after uploading the file, a pop-up to select Attributes appears. Attributes to be displayed on Tooltip, Details, Datagrid and Filter are to be selected.

Click on Save once the attributes are selected and the data will be plotted on the map.



Import Data

In the *Data Grid* there is a button on the left side through which you will be able to import the data onto your system.

Now, in order to do so, select the records among those that are displayed and then click on the import button.



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	Adam Smith	45.36	-68.97	3309 Espero	anza Crossing Suite	e 104Austin78758TXUSA	3309 Espera Suite 104	nza Crossin	g		Austin	78758	ТХ	USA
	Jack Carter	44.18	-84.5	3000 Baypo	ort DrTampa330603	7FLUnited States	3000 Baypor	rt Dr			Tampa	330607	FL	United States

A pop-up will be displayed where you need to select the entity and accordingly the table below will be updated. The data in the table can be configured as per your requirements.

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				Select Entity: Account	~							
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	Record Name	↓ La	titude↓ Lo	Longitude	None	~	None v	None 🗸		PostalCode ↓	State 🗸	Country 🗸
				address	None	~	None v	None 🗸		39109	NV	
				Street1	None	~	None v	None 🗸		18758	тх	
	Jack Carter	44						Save		30607		

Once the data is imported, a success message will be displayed stating such.



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Map view Quick options

- You will find some quick actions from the header menu of the activity map. The Quick actions are:
- Calendar View
- MappyField365 Configuration



• It will be easy to perform some action from the map itself, you will not require to navigate the individual options. Quick actions for Territory Management are explained in the individual topics.

Full Screen

• From the right side on the MappyField365 header, there is an option for 2 Full Screen View.



• You can enter the Full screen view **through** this option.





• By clicking on the 'Full screen' icon, the map view will open in the Full screen view.





Multiple Map Views

• We provide multiple map views like Road Map, Grey Scale, night map and Terra map for the better understanding.

Road Map

• From the Map, the street side view option is provided to check the street view of the location.



GreyScale(Dark) Map

• The GreyScale(Dark) view option on the map displays the map in grayscale(Dark).



Night Map

• The Night view option on the map displays the map in Night.





GreyScale(light)

• The GreyScale(light) view option on the map displays the map in grayscale(light).



Terra Map

• The Terra view option on the map displays the map in Terra.





Advance Options

• From the left side of the MappyField map view, there are **Advance** options given related to check, manage and configure the records on the map: **Layer Card, Save Template, Marketing List, Category Search, Summary Card** and **Refresh.**



Layer Card

- With every plotting record on the map, it would show each plotting as Layer menu.
- Layer Card (Layer Menu) displays all plotted records of the entities in one place.





- From the 'Layer Card', you can **hide/show** the records on the map and **visible/invisible** the 'labels' of the pushpins.
- When the records are plotted for more than one entity on the map, you can **hide** any **entity** for a while to check and manage plotted records of other entities without removing the entity.
- Here the 'All Accounts' are hidden from the map. So, you cannot see the pushpins ♥ of the All Accounts entity on the map.



• By clicking on the Invisible icon 🥙 of any entity, the icon will turn in to visible 👁 and you can view the **labels** of the **records**.





• By making the 'visible' icon of the **Contacts**, the label (name) of the accounts will be visible on the map.

Save Template

- All the plotting data made along with zoom level configurations can be saved as a **Template**.
- By clicking on **Save Template** icon, a dialog box opens to give a name to the template. Moreover, you can select the box **Is Public** to make the template public. To save the existing template, click on the **Update** button.



- After inserting the Template name, click on **Create new template** button to save the template for future reference.
- You can check the saved templates from the **Templates** tab from the header.



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- To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the activity map (Map), it will load with the default template records.
- By clicking on the view 📀 icon, you can view the records of that template on the map. You can also delete any unwanted template by clicking on the delete 🛍 icon.

Marketing List

- Marketing **lists** contain the members like Account, Contact or Lead records. You can add the MappyField 365 data in any marketing list to market the specific segments more effectively.
- By clicking on 'Marketing List' icon under the "Select Entity" option, you will get the Add to Marketing List popup window.





 You can get the "Marketing List" by clicking on Search icon Q if it has already been created in Marketing -> Marketing List or you can add to a new list by selecting the "Add to a new list".



<u>Note</u>: At a time only the single entity records can be assigned to the Marketing List.

Category Search

- You can perform Category Search on single as well as multiple entities.
- Performing this search will list out all attributes of the selected entity. These attributes visible in the category listing dropdown can be managed under the **Entity Configurations** section. Next, you need to select **attributes** based on which record should be plotted. Here, it would show a dialog box for attribute selection for each entity.



• By clicking on the 'Search' button, the data will plot pins as per the selection of attributes. You will get the list of selected categories entity-wise on the right side of the map (Infobox).





• You will see the categorized records with the number of records.

Summary Card

• Clicking on **'Open Summary Card'** icon, you can view the total number of records and other entity related details plotted on map as configured from the back end.





Refresh



By clicking on the Refresh icon, the MappyField map and plotted records will refresh and load again.



Search Options

- You can plot the records of particular **entities** based on different **Search Options**.
- You can search and plot the records based on **five** Search Options:

RegionProximity	DrawingBy User/Teams	[]	2 Territory
Plot Plot External D	ata Routes Templates User Tracking POI	Q 🚔 🏟 🎯 Gillette, WY 82716	** 💬 "*
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3	Lou		©2024 TomTom ©2024 Navinfo ©2024 OSM

By Region

- By region option lets you plot records on the map based on the region of your choice.
- The various regions that you can select one from are **City**, **State**, **Country**, and **Postal Code**.

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			0				Select				
							City				
		CALIF					State				
							Country				
			ARIZO	IA NEW MEXI	c0		Postal code	1			

• If you select the State, you need to insert the 'State' name for that you need to check the records on the map.



Search Options:	
Region	~
Region:	
State	~
State:*	
Texas	

User can also plot multiple regions in map by adding comma (,) separated values. For example: Texas, Tennessee.

• Now, by clicking on the **Search** button, only the inserted states get highlighted on map along with the records that come under that states.



- By clicking on any shape, it will **display a Summary Card for the selected** shape.
- You can see details in the Summary Card of the selected State.


• By clicking on the close X icon, the state will deselect.

<u>Note</u>: You can create and manage the Territory from the individual option of the "Territory Management".

By Drawing

• You can plot the data by defining your own shapes. By selecting the Drawing search option, the drawing tool will enable you to draw the following shapes: Polygon, Circle and Square.

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- And										Search		
	-		1		$\langle - h \rangle$	1	H		Ê	Nashville	3	

• For free drawing select the 'Polygon' shape, just by single clicking on the map drag the mouse cursor the shape will be drawn. You will get the records as per your drawing on the map.





When you draw the shape, you will get the real-time shape measure details as well.

Hudson Bay			ł		
CANADA	Plot			>	<
	Select Entity		Cluster	Search Options:	KAZA
		✓ All Accounts ✓	▼ ⊗	Drawing	
	♥ ✓ Contacts	 ✓ All Contacts ✓ 	▼ ⊗	5 이 다 / 쇼 🔵	URKMENISTAN
	🕂 Add Legend				
Guif of MEXICO CUB	,			Search	Joman Jean
GUATÈMALA	Caribbean Sea		GUINEE BURKIN	A FASO NIGERIA SOUTH SUDAN	ابحر العربي

- You can edit the drawn shape by selecting 'Edit' icon. After selecting Edit icon, you can move the shape and increase/decrease the area of the shape.
- You can remove the drawn shape by selecting "Erase" Δ icon and then click on the shape.



You can change the fill color and the outline color of the shape.

The color picker option is given to change the color of both.

Search Options:



By Territory

 You can also view records on maps based on **Territory**. By selecting the 'Territory' in search option, you will get the list of Territories in the dropdown.

Plot							×
Select Entity					Cluster	Search Options:	
	Accounts	~	All Accounts	~	▼ ⊗	Territory	~
	Contacts	~	All Contacts	~	▼ ⊗	Territory:	
🕂 Ad	d Legend					3 selected beirut	<u> </u>
						Dallas	
						Georgia	✓ 📕
						Colorado	25
6	AUSTRALIA					Illinois	~ }`
						Texas	~

- Select the Territory/Territories the records of which you want to display on the map.
- Now, on clicking the Search button, all records that fall under the selected territory will be plotted on map.

<u>Note</u>: This dropdown would show those territories also that are created under the Territory Management section *or* from Settings -> Sales Territory -> Business Management.





<u>Note</u>: To select territory, territories should be defined by you along with their territory manager in CRM.

- To manage territories, follow these steps: Settings > Business Management > Sales
 Territories.
- Also, territories reflect based on territories created under the territory management section.

By Proximity

- It lets you view nearby records in proximity from current location based on Distance or Time.
- You can define distance either in miles or kilometers as well as time in minutes.

Plot		×
Select Entity Accounts All Accounts	Cluster	Search Options: Proximity V
• Add Legend		O Distance Time 65 75 85 Miles V
		Search





• DynamicsCRM **users** can also search the records using the 'Proximity Search' from the mobile or tab.



By User/ Team

• You can search and plot the entity records based on **Users** and/or **Teams** from the 'Search Options'. It would plot all records that are created by the individual User or the Team.

			Ŭ
101			^
Select Entity	Cluster	Search Options:	
Accounts V	▼ ⊗	By Users	~
		Users:	
		Mike Young	~
		Danny	
		James Ghast	
		Rubia	
51	/	Joanna Spieler	
		John William	

Company

• By clicking on the **Search** button, the records of the selected user will be plotted on the map.

<u>Note</u>: This search option is available only to users who have admin roles.

Map View options

• There are many options and actions provided to manage the map records easily from the Map View.



Details on Hover

You can view record name by hovering on any pushpin. Information shown on hover is completely customizable from the Entity Mapping.



Tooltip Details

• By clicking on any specific record \mathbf{Q} (pin), you will get details related to that record based on **configuration** from the backend. By clicking on that, the details of the Slider will open from the right side.



• From the records detail card from the slider will let you perform different actions related to the selected record.

For the selected record, you can set the direction by defining the Origin or Destination.

Argyle Bartonville TX 76226 United States Education stream: Add to Origin Add to Destination



You can Share & Assign the selected records by:	Alpine Ski House X Argyle Bartonville TX 76226 United States
> Sending Email	Education stream:
> Assigning Owner	Add to Origin Add to Destination
> Add to Marketing List	🖂 Send Email
	🍃 Assign Owner
	Add to Marketing List
	Real of concess
	Controller Second College
	Entering Rescard
	Run Dr. Damand Workhoa

Antipictum factor

<u>Note</u>: These actions are present by default on record of every entity and these buttons cannot be changed.

There are some other actions that can be enabled/disabled from the Security Template	Alpine Ski House X Argyle Bartonville TX 76226 United States
configuration.	Education stream:
Other Actions: > Proximity Search	Add to Origin Add to Destination
> Point of Interest	🖂 Send Email
> Create New Activity	🋃 Assign Owner
> Delete Record	📢 Add to Marketing List
> Run On-Demand Workflow	Proximity Search
> Add /View Note	Q Point of Interest
	Create New Activity
	Delete Record
	Run On-Demand Workflow
	=∕ Add/View Note

<u>Note</u>: Other than these, there are few actions buttons like Check in and Check Out that are dependent on the selected entity.



×

Proximity Search

From the detail cared of the selected record, **Proximity Search** lets you to view nearby records in proximity of the selected record based on time or distance.

Proximity Search





Alpine Ski House Argyle Bartonville TX 76226 United States Education stream: -Add to Origin Add to Destination Send Email Send Email Add to Marketing List Proximity Search Point of Interest Create New Activity Delete Record Run On-Demand Workflow Add/View Note

You can define distance either in **miles** or **kilometers** as well as **time** in minutes.

You can also perform concentric proximity search based on distance with three different values.

Here on defining search criteria of 75, 85,95 Miles, it will plot records situated in 75, 85, 95 Miles area from current pin location.

Also, you can search in proximity from single entry as well.

On hovering over pin, you get details as configured along with travel distance in case of search based on distance. And travel time in case of search based on time.

Note: When proximity search is to be done on basis of time, at max you can define 85 minutes.



Point of Interest

Cook IL 60467 United States								
POI Radiu	s:							
10								
S	🗹 ¥1	v 0	□ ★					
			Go					

You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. from the Point of Interest.

It will take the address of the selected record as POI location to search nearby places.

• After selecting the specific Point of Interest options, click on the GO Button. The selected POI options will plot on the map.



Create New Activity

• You can create a new activity for a record by clicking on the "Create New Activity" icon associated with a specific record. For example, let's create an appointment.



\bigotimes	Plot	Plot External Data	Routes	Templates	User Tracking	POI	Q	≡ ≎	🔘 4S645 Old Naperville R 🛞	e [#]
			WISCONSIN		Toronto	Ottawa	NH A	Alpine Sk Argyle Bart	ti House onville TX 76226 United States	×
					PA	NY MI	R	ducation s Add to Or	stream: - gin Add to Destination	
Denver	UNI-T-ED-	STATES	🔆 🕀 c	reate Activity			>	< Send Er	nail	
	KAN		Select	Activity	Meeting		~	Assign Add to	Owner Marketing List	
		OKLAHOMA Mer	mphist			Crec	ıte	Proximi Point of	ty Search Interest	
EX' 🖬		ARRANSAS		ABAMA	SCT		ť	 Create Delete 	New Activity Record	
	TEX	Austin					=	関 Run On 🎭 Add/Vi	-Demand Workflow ew Note	
hih 1	COAHUILA DE ZARAGOZÁ									

Select the Appointment from the select activity and fill the required fields to create an appointment.

	Quick Create: Meeti	ng	\times
			1
	Owner *	Mike Young ×	Q
	Required Attendees		Q
	Optional Attendees		Q
MA C	Subject *		
	Location		
	Teams meeting	No No	
	APPOINTMENT DETAILS		
	Start Time *	10/23/2024	:::
		12:00 PM	\sim
	End Time *	10/23/2024	:::
		12:30 PM	\sim
	All Day Event		
		Save and Close V	Cancel

- Appointment should have a subject and time details.
- The appointment that is added can be viewed in a detailed view of record in Dynamics CRM.



Delete Record

• By clicking on the delete button, the selected record from the map gets deleted from the CRM.



Run On-Demand Workflow

You need to ensure that the workflow should be "As an On-Demand process" and its scope should be "Organization".

Navigating to Run On-Demand Workflow.



A pop-up would display where you need to select the workflow and click on Execute.



\bigotimes	Plot Plot External	Data Route	es Templates	s User Tracking POI	م	a •	♥ 4S645 Old Naperville R ⊗	» ي شر
C Backwarasu						Alpine S Argyle Bar	ki House tonville TX 76226 United States	×
ASHINGTON		NORTH DAKOTA	MINNESOTA			Education	stream: - igin Add to Destination	
OREGON		SOUTH DAKOTA	Run On-Der	mand Workflow		× Send E	mail Owner	
		NEBRASKA UNITED-S KANSA	Workflow:	None None Account - add email	~	Add to Proxim Point c	Marketing List ity Search f Interest	
		oklah	OMA ARKANSAS	TENNESSEE		Create Create Delete Run Or	New Activity Record n-Demand Workflow	
				epi Georgia		■ Add/V	iew Note	
2								

This would trigger the selected on-demand workflow.

Add/View Notes

• You will be able to **Add/View Note** by selecting the respective option. A pop-up consisting of Add Note form is displayed where you would need to enter all the needed details.

\bigotimes	Plot Plot External	Data Routes	Templates	User Tracking	POI	ର 🛱	*	Ø 4S645 0	ld Naperville R	⊗ ©) ₂ ,4
A.440 X			ONTA	RIO	QUÉBEC		ine Ski de Barto	House	6 United States		
		=	Add Note			×	cation st	ream:			
ASHINGTON		NORTH DAKOTA	tle					in Add to			
-25-7			Changes needed								
OREGON		SOUTH DAKOTA	nter A Note				Send Em	ail			
		NEBRASKA	Changes needed				Assign O Add to M	wner arketing List			
		UNITED-S					Proximit	y Search			
			elect File: 🕕				Point of I	nterest			
			timesheet.entery.li	ne.xlsx	U	pload	Create N	ew Activity			
		OKL					Delete Re	ecord			
					Ad	d	Run On-I	Demand Wor	kflow		
œ		TEXAS	MISSISSIMM	I GEORGIA			Add/Vie	w Note			
8											

• Once you add the note, it will be displayed below the form. From the saved note, you can download the files attached to the respective notes by clicking on it.



=, Add Note	×
Title	
Enter a note title	
Enter A Note	
Enter a note	
Select File: ()	
Choose File	Upload
Changes needed	
Changes needed	
timesheet.entery.line.xlsx Mike Young 10/23/2024 12:02 PM	
	Add

Direction



By clicking on the **Directions Add to Origin** option, address of that record will be added as starting point in **Routes**.

From **Routes** tab you will get address of your customer's location.

• On the map, the 'Starting Point' will be assigned as **A** with the address of that record displayed.







By clicking on the Add to Destination option of the other records, the address of that record will be added as destination point of route under Directions tab.

• You can select the **Origin** and the **Destination** between the plotted records from the **Directions** option and manage your route based on that direction.

Plot	Plot External Data	Routes Templates	User Tracking	POI	Q 🗰 🌣	4\$645 Old	I Naperville R
	SASKATCHEWAN	ON STATES	TARIO		QUÉBEC		
, K	outes						^
4	🛋 🛱 🛱		Options	Leave Optic	ons		
IDAHO	Argyle, Bartonville, 762	26, TX, United States	Shortest Entity Shortest ti Route Option	/ me 🔵 Sho	ortest distance		
1	51 Radcroft Road, Atlar	nta, US-GA 31772, GA, US	Avoid high	iways			
6	+) Add Location		Avoid ferri	es			
	Your Location		Along the	route			
	Share Route 🕒 Sa	ve Route 😢 Navigate	Route		View Saved Ro	outes >	Go
	- C. C. Mar						



• Click on the **GO** button to check the routes between selected **Origin** and **Destination** on the Map.



Send Email using Template

Add to Origin Add to Destination	From the Share & Assign, you can 'Send Email' to the selected record.
🖂 Send Email	By clicking on that action button, it would
🎝 Assign Owner	prompt user to select an email template.
Add to Marketing List	

• The email templates list would have a list of all the templates that are created within the CRM and custom templates as well. You may select from the list or select New email to create a new one. Selecting template would directly perform the mail action if email id is available. While creating a new one would redirect **to the CRM** email screen.

🖂 Send Email	×
Select Email Template	
New Email	~
	Send Email

<u>Note</u>: If the user to whom the mail is being sent is not operating the email address, then the mail won't be sent and an error message stating that record's email address is not active will be displayed.

Assign Owner



From the 'Share & Assign', you can Assign Owner for the selected record. You can assign any record to specific user or team by clicking on "Assign Owner" option from specific user's details.

• Selecting the Assign Owner option, it opens a dialog box where a dropdown list of all the CRM users is provided to select the user or team as required. After selecting the appropriate User/Team, click on the **Assign** button.



Assign to User		×
John William		~
	Assign	Cancel

<u>Note</u>: When assigning a record to a user or team, that specific user or team should have a role assigned to it or else the record won't be assigned.

Assign to Marketing List

• You can add to the marketing list by clicking on the specific option.



• On clicking, you will have the option to **add a record** either in existing marketing list or create the new one.

📢 Add to Marketing List	×
Select marketing list in which you like to add record	
• Add to an existing list	
Add to a new list	
	Q
Add Car	cel

• After selecting the marketing list, click on the Add button to complete the addition of records to the marketing list.

<u>Note</u>: Assign to marketing list icon under map section, will assign all records of particular entity to the list. Also, it will get assigned only when records of single entity are plotted on map.



Qualify/Disqualify Lead

• By clicking on "Qualify Lead" icon, status of lead will get updated to close state and user will be redirected to the opportunity page from the map. It is available only for record of lead entity.



<u>Note</u>: Open leads will display option to qualify/disqualify leads. Once leads are qualified, those leads will be shown in Closed Leads view.

Disqualify Lead

• By clicking on "Disqualify Lead" icon, leads will get disqualified and its status will be changed to close.



plates User Tracking POI	Q 📋 🏟 💿 12225 County Road 142, 🛞 🖉
	Michael Johnson X Will IL United States
	Owner: Mike Young
CANADA	Add to Origin Add to Destination
	Send Email
	🛃 Assign Owner
	Add to Marketing List
	Proximity Search
	Point of Interest
	Create New Activity
	Delete Record
La ta ta ta	Run On-Demand Workflow
Gulf of	■ Add/View Note
MÉXICO	Ouglify Lead
AVIT	
Show Data NICARAGUA Carib	

• Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Canceled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.

Q	Point of Interest
÷	Create New Activity
Þ	Run On-Demand Workflow
=,	Lost
•	Cannot Contact
\bigotimes	No Longer Interested
1	Canceled
	Lost 🗸
	Disqualify

• Disqualified leads can be reactivated by clicking on Reactivate Icon present with closed lead record.

Reactivate Lead

• By clicking on "Reactivate Lead" icon, leads will be reactivated, and its status will be changed to Open.





Note: On reactivating lead, view of lead will get updated from closed leads to open leads.



Direction

• Once you add the records to 'Origin' & to 'Destination', you can check in to the **Routes** tab. From here by clicking on the **GO** button, you will get the route navigation with details.

Plot Plo	t External Data Routes Templates User Tr	acking POI	۹ 🗰 🏟	4S645 Old Naperville Road,
The second se	CANADA	l abradas Bas		North Sea
	Routes			×
	a i a	Options Leave Op	ptions	IRRE
	Argyle, Bartonville, 76226, TX, United States	 Shortest time Shortest time Route Option Avoid highways 	Shortest distance	
океан	Add Location Your Location	Avoid tollsAvoid ferriesAlong the route		, 7
	Share Route 😨 Save Route 🥩 Navigate Route	9	View Saved Routes	> Go

• From the **Route** tab, you can also add multiple addresses and get directions.



• On the Map, you will get directions based on Driving including alternate directions if any. You can add multiple way points by clicking on 'Add Location'. You can add a maximum of 25-way points.



Х

Routes

➡ ★ ∞	Options Leave Options
 Argyle, Bartonville, 76226, TX, United States Southeast Fairbanks, AK, United States Add Location Your Location 	 Shortest time Shortest distance Route Option Avoid highways Avoid tolls Avoid ferries Along the route
Share Route 🕑 Save Route 🕺 Navigate Route	e View Saved Routes > Go

Multiple Routes

• By clicking on any location *or* plotted records, click on **Add to Destination** to add multiple way points or you can add manually by clicking on the **Add Destination** from the 'Routes tab'. As you add all the required location and click on **GO** button, you will get the routes based on the location of multiple way points.

Rout	tes				×
	क है क		Options Le	ave Options	
	Argyle, Bartonville, 76226, TX, United States Southeast Fairbanks, AK, United States South Dakota, Laredo, TX 78041 Missouri City, TX dd Location our Location) &) &) &) &	Shortest Entity Shortest time Route Option Avoid highwo Avoid tolls Avoid ferries Along the rou	ys	
ح ۹	Share Route 🕤 Save Route 📌 Naviga	ate Route	9	View Saved Routes > Go	
20	Argyle, Bartonville, 76226, TX, United States)	For all the waypoints added in the each way point can be dragged to their position in the route	route, reorder
C	 Southeast Fairbanks, AK, United States South Dakota, Laredo, TX 78041 			After reordering the route, immediately reflect on the map also	it will
•	Missouri City, TX				



- After selecting the location between Origin and Destination, it will list all possible routes and highlight the optimized route.
- You can also get directions based on means of transport like Public Transit and Walking.





Share Route

Routes

0	Argyle, Bartonville, 76226, TX, United States
•	South Dakota, Laredo, TX 78041
(+) (+)	Add Location Your Location

• As you click on the 'share' icon, the **Email** page in CRM side will open with the **link** of selected route. You need to insert the account/contact details to whom you want to send the email.

Route link - Unsaved imail · Email ·				Draft Mike Young V Due Status Reason Owner
Email Related	~			
rom	MY Mike Young ×		Q	Attachment
c			Q	Attachments (0) $<$ $>$ $+ _{\sim}$:
c			Q	No attachments included.
cc			Q	
ubject	Route link			
			63	
a _a v 19 v	🖓 Segoe UI	-> B <i>I</i> <u>∪</u> S		
Hi Please use the bel <u>https://www.bing.</u> Dakota. Laredo. T: For Smartphone/T <u>From: Argyle. Bart</u>	low link to access route in Desktop/Laptop .com/maps?rtp=adr.Argyle_Bartonville_76 X 78041\$&mode=D fablet. please use following links: .conville_76226. TX. United States . To: Sout	x 226. TX. United States~ h Dakota. Laredo. TX 78	adr.South	
Title	Address	Entity		
Alpine Ski House	Argyle, Bartonville, 76226, TX, United State	s Account		

Thanks.

• You can see the preview of the email. As per the preview, the route details will be shown in the tabular format in the email.



Hi

Please use the below link to access route in Desktop/Laptop: https://www.bing.com/maps?rtp=adr.Argyle, Bartonville, 76226, TX, United States~adr.South Dakota, Laredo, TX 78041\$&mode=D

For Smartphone/Tablet, please use following links:

From: Argyle, Bartonville, 76226, TX, United States , To: South Dakota, Laredo, TX 78041

Title	Address	Entity
<u>Alpine Ski House</u>	Argyle, Bartonville, 76226, TX, United States	Account
-	South Dakota, Laredo, TX 78041	-

Thanks.



Save Route

• Also, the selected route can be saved for future reference. To save a route, click on the Save 🖥 icon available on the top.

🛱 🛱 🛱		Options Leave Options
	TV United Otates	Shortest Entity Shortest time Shortest distance
Argyle, Bartonville, 76226	TX, United States	Route Option
South Dakota, Laredo, TX	78041	Avoid highways
		Avoid tolls
+) Add Location		Avoid ferries
3 Maximum Lange and Lange		Along the route
Share Route B Save	Route 🕑 Navigate I	e Route View Saved Routes > Co
Share Route B Save	Route 💰 Navigate I	e Route View Saved Routes > Co
Share Route B Save tes F	Route 💰 Navigate I	e Route View Saved Routes > Co
Share Route B Save tes f ab	Route 💰 Navigate I	e Route View Saved Routes > Co
Share Route (B) Save	Route 💰 Navigate I	e Route View Saved Routes > Go
Share Route () Share Route () Save () Argyle, Bartonville, 76226, 1 South Dakota, Laredo, TX 7	Route C Navigate I	e Route View Saved Routes > Co
Share Route B Share Route B Save Utes Argyle, Bartonville, 76226, 1 South Dakota, Laredo, TX 7 Add Location	Route 💰 Navigate I	e Route View Saved Routes > Go

- By clicking on Save 🗟 icon, it opens a dialog box where you need to provide a name to the route and user/team name to whom the route is being assigned.
- Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.
- By clicking on the **Save** button, the route will be saved and you can find these routes by clicking on the **View Saved Routes** button in the **Routes** section.







• You can preview the routes and delete any if it is not required. Routes can also be filtered based on Start date and End date by clicking on this ricon

Saved Routes(2 selected)	ľ×
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FR8482	
Basic Sells (
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•	
manage	- n
And the second second	- 1
	_
Record Roads (21)	- 1
And participant of the second se	- 1
	- 1
60	_

- You can also apply various filters on route by clicking on "Options" dropdown. Various filters related to Distance are:
- Route Name
- Assignee to
- Priority
- Date



r Routes	×
эг Туре	
rpe	~
rpe	
ime	
e to	
	at .
	A
	r Routes er Type /pe /pe ame e to

Along Route

Navigate to **Options.**

× Routes Options Leave Options ஆ ħ Shortest Entity • Shortest time • Shortest distance Ο 661 East Rain Cloud Drive, Scenic, AZ 86432 **Route Option** Surat Avoid highways 0 Avoid tolls (+) Add Location Avoid ferries Along the route Your Location Share Route 🕒 Save Route (S) Navigate Route View Saved Routes > Go

- Now, selecting **Along the route** search option displayed in the **Options** drop down section prompts the user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of the plotted route and displays pin in different colors than that which are within the route.

Routes		A Biztech Compar
■ ■ 怍 础	Options Leave Options	
661 East Rain Cloud Drive, Scenic, AZ 86432	Shortest Entity Shortest time Shortest distance Route Option	
Surat	Avoid highways Avoid tolls	
Add Location Your Location	 Avoid ferries Along the route 	
	Records along the route 20	
	POI along the route	

POI along the route

This feature lets you view all the Point of Interests within the route plotted.

In order to view all the POIs, once you enter the routes, you need to navigate to the Options section.

Plot	Plot External Data	Routes	Templates	Us	er Tracking	POI	Q 📋	\$ 4\$645 Old	Naper
, dela	Routes							×	Ŕ
	Indian Ocean	s City, TX tle, WA Dakota) ©) ©	Options Shortest Entity Shortest tir Route Option Avoid high Avoid tolls Avoid tolls Avoid ferrie Along the r Records POI alon 2d None seler	Leave Options me Shortest ways es route along the route g the route cted	distance	~	an
	Share	Route 🗊 Save	Route 🕑 Naviga	te Rout	9	Vie	≫w Saved Routes >	Go	

Select the checkbox of POI along the route in the Options section where a list of all the available POIs are listed.



🛱 🛱 🛱		Options Leave Options
O Texas City, TX	⊗	Shortest Entity Shortest time Shortest distance Route Option
O Seattle, WA	8	 Avoid highways Avoid tolls
North Dakota	\otimes	Avoid ferries
 Add Location Your Location 		 Records along the route POI along the route 20 None selected

Enter the radius(KM) within which you want the POIs to be plotted. Also, further select the POIs through the drop down menu. Once all the details have been set, click on Go to proceed further.

🚘 🛱 🕅 📾	Options Leave Options
O Texas City, TX (3)	Shortest Entity Shortest time Shortest distance Route Option Avoid highways Avoid tolls
North Dakota	Avoid ferries
 Add Location Your Location 	Q Search Coffe Shop ✓ Gas Station ✓ Hotel ✓ Restaurant ✓
Share Route 🕞 Save Route 📌 Navigate Route	ute View Saved Routes > Go

You will be able to see all the selected POIs plotted on the map between the routes within the entered area.





Multiple Saved Routes

You can plot multiple addresses at a time on the map. In order to do so, navigate to Routes and click on Saved Routes.

\bigotimes	Routes	an hang na Q 🗰 🌣	
n alt a start and a start and a start a	Арктический Океан		Арктичес
* Cust	Routes		×
A simples a	🛱 🛱 🛉 ֎	Options Leave Options	
A LENRORE CAST	Gel East Rain Cloud Drive, Scenic, AZ 88432	Shortest Entity Shortest time Shortest distance Route Option	ASIA
	 Surat Add Location Your Location 	Avoid highways Avoid tolls Avoid ferries Along the route	Pacifi
Indian Ocean	Share Route 🐵 Save Route 💰 Navigate I	Route View Saved Routes >	Go an Alstralia
			· · · · · · · · ·
0		Υ.	0

A slider will be displayed consisting of all the saved routes. Select the routes you want to view on the map.





Once you click on Go, all the selected routes will be displayed on the map.



The colors of the routes are mentioned in front of the respective routes in the Saved Routes slider.





SPF (Shortest Path First)

• If Route optimization is enabled from Configuration, then it will shorten the added routes with SPF algorithm. It can rearrange routes according to their distance from each other.



Before SPF



After SPF



<u>Note</u>: If you have enabled the SPF from the Default Configuration, only then SPF algorithm gets applied on the route.



Templates

• Templates feature helps you save map configurations so that you can come back to them later and tweak them according to requirement.



• If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

<u>Note</u>: If template is not public, only admin and the user who created that template will be able to view it.

	🗟 Save Template	×
	Template [*]	
	Sales data	
	Is Public	COLOR
8	Save	

• Under the Templates section, logged in users can see all the templates created by them or the templates that are made public.



\bigotimes	Plot	Plot External Dat	ta Routes	Templates	User Tracking	POI	Q		\$	0	4\$645 Old	Nabe
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Ð	WASHINGT	ON I S	Templates								×	-7
	OREGON		Map Templates			↓ 4	ction					
						(> ₫ +					
			Default			(୭ 🛍 +					π,
						(> ₪ +					
						(> ₪ +					
8	V	The second se				(୭ 🛍 +					
			Showing 1 to 5 of 16 e	entries		← Previe	ous 1	2	3	4	Next →	

- The templates can be previewed by clicking on View icon <a> or You can delete as per your requirement.
- Through the **Plus icon**, you will be able to make that particular template, default.


POI-Point of Interest

- If you want to search specific locations like restaurant, coffee shops, hotels, airport, gas station, etc. near the plotted records, click on **Point of Interest** tab.
- You must insert the location; the autofill dropdown will appear. You will get the POI location bases on your location.

nal Dat	a Routes	Templates	User Tracking	POI	Q	\$	4\$645 Old Nat
				NUN	iavut	5° .	R
F	Point Of Interest	:					×
с	ocation:						
	Q Please enter PO	I location	\otimes	Radius In Kilor	meter		
	🖌 🖶 Hotels	🗹 Ψ¶ R	estaurants	Attractio	ons	🛧 Airpo	orts
	Coffee shops	🗌 📑 G	as stations	Others			
L							Go

- Under the **POI** tab, select the location/place which you want to search.
- After selecting the POI Location, click on the **GO** button to plot the records of the POI on the map.



• From the "Layer card", you will get the **POI Layer** and you can also check the POI locations in detail from the "Details cards" on the right side of the map.





Data Grid

- **Data Grid** provides a listing of records which are plotted on the map. You can perform the different actions and manage the records from the Data Grid.
- To view the plotted records in the data grid, click on **Show Data**.





• By clicking on **Show Data**, a slider will open. You can view the plotted data as per selection of Entity. In the dropdown list, you will get only those entities which are selected to plot the record on map

	Plot	Plot External Data	Routes Templat	es User Tracking	POI	Q 🗯	*	12225 County Road 142, Bangs, TX	. 🗷 🦨
S And			2 2 2	Hide Data		Attestic Doese	· • •		ASIA
Sele	Accounts	-All Accounts	1 3			5		ی ۲ ک	
Sea	rch:	2				4		Copy Excel	🖶 Print
	Account Name	↓ Full Address		↓ Owner	↓ E	Email		↓ Actions	
	Account Name	Full Address		Owner		Email			
	-	Decatur, Decatur	, 76234, TX, United States	Mike Young	-			© 1	
	aad	Jasper, 62448, IL,	United States	Mike Young	Ň	virti.s@biztechcs.cc	om	© 1	
	Adam Smith	Daskroi, Daskroi,	382425, Gujarat, India	Mike Young	-			© 1	
	Adam Smith	-		Mike Young				© 1	

1. You can get the records of a specific entity by selecting the Entity View.

Select Entity View	Leads-All Leads	~
	Accounts-All Accounts	
Search:	Contacts-All Contacts	
	Leads-All Leads	

- 2. You can search the records through here.
- 3. The records will display as per the selection of the 'Entity View'.
- 4. Copy the records, export the records in a specific file (Excel/PDF) and direct print the records.
- 5. Perform the different actions by selecting the data grid records:





• By clicking on **View** icon (1), that record will get opened in CRM. By clicking on **Delete** icon (1), it deletes the respective record from the CRM.

Note: Only users with System Administrator or Appjetty Calendar 365 admin can delete the records.

• You can perform actions by **selecting records** within the data grid as shown below:



Create Route and Route's Activity

You will be able to create routes and the respective activities by clicking on the first icon displayed on the Data Grid.



Once you select the specific accounts, navigate to the icon. A pop-up will be displayed where you need to fill in the details such as Route Name, User/Team, Start and End Date of the route, Priority, Time and Start Location. Click on the **Review + Create** button soon as you add all the necessary details.



Save Route		×
Route Name [*]	Marketing visit	
User	Mike Young	~
Priority	Low	~
Route Start Date [*]	24-10-2024	
Route End Date [*]	31-10-2024	
Start/End Time	9:00 AM O 5:00 PM	©
Select Activity	Meeting	~
Start Location*	Texas City, TX	
	Review + Cre	eate

You will then be navigated to the **Review Activity** page.

iration							
30 minutes			~ 24-10-2024				
Set Duratio	n for	all	Marketing visi	t-10/24/2024			
Subject	\downarrow	Regarding	Duration	Start Date	End Date	Action	
Appointment With Alpine Ski House		Alpine Ski House	30 Min 🗸	1:31 PM 💿	2:01 PM O	C Ō	
					← Previous 1	Next →	
					< Previous	Next -	

Over here if you need to set the duration, enable **Set Duration for all** and the **Duration** field would then be accessible.



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A Biztech Company

×

If there are multiple dates, you will be able to see the routes set for another day by selecting the date, through the drop down menu.

Review Activity						×			
ration									
30 minutes		~	· _ 24	4-10-2024				~	
Set Duration	n for	all	Marketing	visit-10	/24/2024	•			
Subject	\downarrow	Regarding	Duration		Start Date		End Date		Action
Appointment With Alpine Ski House		Alpine Ski House	30 Min	~	1:31 PM	C	2:01 PM	C	C
							← Previous	1	Next \rightarrow

When clicked upon this button, you will be redirected to the Google Map where the route will be displayed.



Review Activity





The icon beside, will redirect you to Mappyfield.





In the table, the **Duration** and **Start time** fields would be editable once you click on the **Edit icon**. The **End time** will automatically be updated as per the start time.

			A Bizte
Review Activity			×
ation			
0 minutes	~ 24-10-2024		~
Set Duration for all	Marketing visit-10/24/2024		
Subject V Regarding	Duration Start Date	End Date	Action
Appointment Peter With Peter	30 Min 🗸 12:49 PM 😋	1:19 PM 🕑	C ū
		← Previews 1	Next →

You can as well delete a particular location through the delete icon. A warning message will be displayed, and to proceed with the deletion click **Ok**.

Warning
Do you really want to delete this activity?
OK CANCEL

Now once all the configurations have been set, click on Create.

Review Activity ×							
ion							
ninutes	✓ 24-10-2024		~				
Set Duration for all	Marketing visit-10/24/2024		PU Q				
ubject 🗸 Regarding	Duration Start Date	End Date	Action				
ppointment Peter /ith Peter	30 Min 🗸 12:49 PM 🕲	1:19 PM 💿	C				
			Novt ->				
		← Previous 1	Next -				

This created route and the activity will then be displayed in the **Saved Route**. Here as this is a **Master Route** you will not be able to view it. But for the child routes, along with Edit and Delete you will be able to View them.

Child Routes will be created as per the dates. If the admin sets the date from 18th July to 19th July, then the routes to be covered on 18th as per the distance and time will be listed as child route and the other child route would consist of the remaining route to be covered on 19th.



The edit icon will display the **Save Route** pop-up along with all the details you have entered. Below, there is a **Review Activity** button.



Save Route		×
Route Name*	Marketing visit	
User	Mike Young	~
Priority	Low	~
Route Start Date [*]	24-10-2024	
Route End Date [*]	31-10-2024	
Start/End Time	9:00 AM C 5:00 PM	O
Select Activity	Meeting	~
Start Location*	Texas City, TX	
	Review + C	reate

Clicking on this will direct you to the **Review Activity** page where you can **Update** any details if needed.

ation				
minutes	~	25-10-2024		
Set Duration for all	MArketing rout	e-10/25/2024		
Subject \downarrow Regarding	Duration	Start Date	End Date	Action
Appointment biztech ac With biztech ac	30 Min 🗸	1:39 PM C	2:09 PM	0 2 1
			← Previous	1 Next -



Add Record to Route

• Select the records and click on the "Add Record to Route" icon to add the records to the route.



- By clicking on that icon, the 'Routes' tab will appear with the selected records of the data grid.
- The locations will be added based on the record selection in Data Grid.

Routes	×
□ 方 ∞	Options Leave Options Shortest Entity
O 2345 Birchwood Dr, Redmond, 98101, Washingto	• Shortest time Shortest distance Route Option
Argyle, Bartonville, 76226, TX, United States	 Avoid highways Avoid tolls
Add Location	Avoid ferries
Your Location	Along the route
Share Route 😨 Save Route 🛃 Navigate Route	e View Saved Routes > Go

<u>Note</u>: If you proceed to perform any action from the data grid without selecting any record, you will get the Alert message that will prompt you to select the record.



Assign to User/Team:



×



Send Email by selecting the records.

As you click on Email icon, the Send Email popup window will open. You need to select the Email Template.

By selecting an email template, you can send the Email on the email ids of the selected records.

By clicking on **Send Email** button the email page will be redirected.



Manage Territory

Manage Territory	×
Territory	~
	Save

From the Data Grid, you can add your selected records in the specific Territory.

As you click on Territory icon, the Mange Territory window will open.

You need to select the Territory and after that click on Save button.

Here you will get the dropdown list of the Territories as per Adding and Managing Territories.

Contextual Menu

'Right click' on the map to open the Context M

• It provides options as below:

> Create New Record
 > Show Detail
 > Create New Activity
 > Add to Locations
 > Set As Current Location.

You (or logged in CRMusers) can also set default settings by hovering on Save Settings option:

> Default Location > Map zoom level > Origin > Destination.





- These settings directly get saved under MappyField 365 Configuration record for logged in users.
- By selecting Create New Record Option, open a dialog box to select record type.

Create New Record

• It can be Account, Contact or Lead. Upon selection of the option, you are redirected to a particular entity page of record creation.

+ Create New Record	×	+ Create New Record	×
What would you like to create?		What would you like to create?	
Account	~	Account	~
Account			
Agreement			
Contact			Create
Lead			Credito



Show Detail



By clicking on the **Show Detail** option from the Context Menu, you will get the popup window of the 'Public Details' from the right side as per the location.

• You will get the address details of the location. You can search the POI places and get the direction from the selected location.





Create New Activity



From the Context Menu, you can directly add a Task and an Appointment.

• You can add the activities that are enabled from the CRM backend. By clicking on the **Create New Activity**, "Create Activity" popup will appear.

	<u>∼</u> <u>+</u> +-	
🛨 Create Activity		/ ×
Select Activity	Meeting	~
	с	reate
	ARKAN	SAS

• By clicking on the **Create**, the popup will appear to select the required details to add the selected activity.



Quick Create: Meeting								
Owner	* 🐠 <u>Mike Young</u> ×	Q						
Required Attendees		Q						
Optional Attendees		Q						
Subject	*							
Location								
Teams meeting	No No							
APPOINTMENT DETAILS								
Start Time	* 10/24/2024	:::						
	3:00 PM	\sim						
End Time	* 10/24/2024	:::						
	3:30 PM	\sim						
All Day Event								
Duration	30 minutes	\sim						
	Save and Close 🗸	Cancel						

• Similarly, you can perform the actions for other options from the Context Menu.

Calendar View

• You can also view the plotted activity records in the calendar view along with the Map view.



- You can view the calendar on a daily, weekly, and monthly basis.
- On clicking the activity from the calendar view, it will give the details of that record.



	Mee	ting: Appointment: Disc	ussion regarding sales - Dyr	namics 365 - Googl	le Chrome					-		×		Crys	stal Peak	Road, G	arrison,	UT 8 🗵		, <u>,</u> ,
	≏ 5 m	a mappyfield365dev.crm8.dynamics.com/main.aspx?appid=1052f5af-3cf4-404a-bfec-2e14ccd5ec49&forceUCI=1&pagetype=ent 🔍																		
		Dynamics 365	MappyField 365	SAND	BOX	م	Ŷ	+	7 🕸	?	<i>@</i>)	MY								12 ×
	=	← 🖬 🖬 s	ave 🗸 Mark Complete	e 🙎 Check In	🖔 Refresh	🖏 Check	Access	:		🖻 Share	~	Ð			«]	<	> [»	Today	
3	6														L.		week	Month		
2	C	Discussion re	egarding sales - Sav	red		Normal	Open	MY	Mike You	ng 🗸						UC	tober 2	024		
1	52	Meeting				Phonty	Status		Owner				120	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	9	Appointment	Related \vee										E		30 04:30 PN	02:44 PM	2	3	4	5
	*												~		05:30 PN	03:21 PM				
	9	Required			٩				<u>v</u>		- 1		The	6	7	8	9	10	n	12
ceŧ		Optional			م				•				Sort						11:40 AM 12:10 PM	
		Subject	* Discussion re	garding sales									~~~	13	14 10:01 AM	15 02:15 PM	16 02:05 P N	17 02:10 PM	18 10:30 AN	19
		Location											5		10:56 AN +22	02:51 PM 03:30 PM	02:43 PM 03:13 PM	06:30 PN 07:00 PN	10:30 AN	
		Teams meeting	No No											20	21	22	23 02:00 PM	24 11:30 AM	25 01:39 PM	26
		Regarding	Adam Sm	<u>th</u> ×	Q												03:00 PN 03:30 PN	02:03 PN +6		
													1	27	28	29	30	31		
		Attachments											U							
					÷															

• After clicking you can also see the summary card which will have the details of that activity.

🥎 Plot Plot	External Data Route	es Templates Us	ser Tracking POI	۹ 🗰 🏟	Orystal Peak Road, Garris	on, UT 8 🛞 💬 💅
« < > »	Today		October 2024	i -		⊠ X Day Week Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29 0 1 +2	30 4:30 PM jiu 5:30 PM Appointment With bizte 2	1 02:44 PM Appointment With higu 03:21 PM Appointment With bizter 04:16 PM Appointment With <mark>Heinin</mark>	2	3	4	5
6	7	Ac Rey Sto Sul	tivity Type: Meeting garding: shantiniketan school art Time: 10/16/2024 2:05 PM bject: Appointment With antiniketan school	10	11 11:40 AM Appointment With Tee 12:10 PM Appointment With test 2	12
13 10 10 +2	14 D:01 AM Appointment With Jainis D:56 AM Appointment With NPM 22	02:15 PM Appointment With Dizter 02:51 PM Appointment With higu 03:30 PM Appointment With vastr	02:00 FM Appointment with shar 02:43 PM Appointment With Meet 03:13 PM Appointment With Test I	17 Varue r ^M Appointment With Veda 06:30 PM Appointment With hjgu 07:00 PM pritest4	18 10:30 AM rr 10:30 AM TT	19
20	21	22	23 02:00 PM Sales Demo 03:00 PM PArth Test 03:30 PM Demo	24 11:30 AM Client Meeting 02:03 PM Appointment With shan +6	25 01:39 PM Appointment With bizter	26
27	28	29	30	31		

• You can also view the calendar in full screen by clicking on the full-screen icon.



Plot P	lot External Data Rout	es Templates Us	ser Tracking POI	۹ 🗰 🏟 🌔	Orystal Peak Road, Garris	on, UT 8 🛞 💬 🦉
« < > »	Today		October 2024	1		Day Week Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	30 04:30 PM jiu 05:30 PM Appointment With bizte +2	l 02:44 PM Appointment With hjgu 03:21 PM Appointment With biztec 04:16 PM Appointment With Jainit	2	3	4	5
6	3 7	8	9	10	11 11:40 AM Appointment With Tee 12:10 PM Appointment With test 2	12
15	14 10:01 AM Appointment With Jainis 10:56 AM Appointment With NPM +22	15 02:15 PM Appointment With bizter 02:51 PM Appointment With higu 03:30 PM Appointment With vastr	16 02:05 PM Appointment With shan 02:43 PM Appointment With Meet 03:13 PM Appointment With Test M	17 02:10 PM Appointment With Vedd 06:30 PM Appointment With hjgu 07:00 PM pritest4	10:30 AM rr 10:30 AM TT	19
20) 21	22	23 02:00 PM Sales Demo 03:00 PM PArth Test 03:30 PM Demo	24 11:30 AM Client Meeting 02:03 PM Appointment With shar +6	25 01:39 PM Appointment With bizter	26
27	7 28	29	30	3		

• You can also reschedule the activity by dragging and dropping to a particular date.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	30 04:30 PM jiu 05:30 PM Appointment With bizte +2	1 02:44 PM Appointment With hjgu 03:21 PM Appointment With biztec 04:16 PM Appointment With Jainit	2	3	4	5
6	7	8	°	10	11 11:40 AM Appointment With Tee 12:10 PM Appointment With test 2	12
13	14 10:01 AM Appointment With Jainis 10:56 AM Appointment With NPM +22	15 02:15 PM Appointment With bizter 02:51 PM Appointment With hjgu 03:30 PM Appointment With vasti	16 02:05 PM Appointment With shan 02:43 PM Appointment With Meet 03:13 PM Appointment With Test M	17 02:10 PM Appointment With Veda 06:30 PM Appointment With hjgu 07:00 PM pritest4	18 10:30 AM rr 10:30 AM TT	19
20	21	22	23 02:00 PM Sales Demo 03:00 PM PArth Test 03:30 PM Demo	24 11:30 AM Client Meeting 02:03 PM Appointment With shan +6	25 01:39 PM Appointment With bizter	26
27	28	29	30	31		

• After dragging and dropping the activity a warning message will popup on the screen. Click on OK to re-schedule the activity.



• Activity updated successfully message will appear on the screen.



Note: The time of the activity will be the same as it was before rescheduling.

•	 Activity updated successfully 	
		2 X
« > » Today	28 March, 2023	Day Week Month
	Tuesday	
6am		
7am		
8am		
9am		
10cm		
llam		
10		
Izpm		
1pm		
2pm		
3pm		
4pm		
E		
opini		

• You can reschedule the time of the activity from the Daily view by dragging and dropping as per the requirement.

🛕 Warning
will be rescheduled to 15-07-2024 09:30:00. Are you sure you want to reschedule this activity?
OK CLOSE

• Activity updated successfully message will appear on the screen.



Ť		✓ Activity updated successfully	2 X
«	Image: Contract of the second seco	28 March, 2023	Day Week Month
		Tuesday	
6am			
7am			
8am			
9am			
10am			
11am			
12pm			
lpm			
2pm			
3pm			
4pm			
5pm	uouu PM - Quate Discussion		



Heat Map

Note: Heat map is available only for Azure map, <u>Contact us</u> to use the heat map feature.

• Get the aggregated visualization by selecting the data sources of any Entity to check the statistical data.

Heat Map Navigation

- You can plot records of the Entities on the Heat map that are already configured in "Entity To Map".
- It would open a map for you to select further map options. Here, it would list all those entities that are configured under Entity Mappings.
- Different options are:
 - Select Data source: Choose entity and its view to analyze data.
 - Select Measure: Select the aggregation method to be used to color code the region. By default, it would be based on the number of records.
 - Select Filter: This option lets you select categories to filter data results.
 - Select Display: You get four different options to analyze data on a heat map. Options are:

Sirian Lanegan	Heat Map Te		
Barn Uroft Bandar Abbas	PÄKISTÄN Jalaibou East Sürab Gahl Sül Khuzdar Sukkur Kalan Kolayat Khuzdar Sukkur Rilmgarh Ramonh	New Dehn Juunhunun Faridabad Shahpura Arro	Vigaze I Sha Tirri Pokhara Nautanwa Kathmandu DRUK YUL
Ras Al Khaimah	Heat Map	×	Gorákhpur Sursand Birátnagar Rasrá Madhipura Birátnagar Guwaháti) Rasrá Madhipura
ubai Chabahar	Select Datasource	Select Display	aranasi Patna elikar Mithapukur Megikalaya
IDI Al Sohar Sea of Oman	Accounts ~ All Accounts ~	No Boundary ~	rauli Jainagar JHARKHAND BANGLADESH
Barka Muscat	Select Measure		Kushtia Dhaka West
Nizwa	By Count 🗸		In Jamshedpur, Kolkata Barisal Ch
	Select Filter		harsia Noamundi Galachipa Cox's Karanjia Baleshwar Bazar
OMAN	By Filter 🗸		atnägarh Bari Räj Kanika
1 14			opiska Bhubaneshwar rhial Banapur
		Search	iramgarh, Āsika
		Nagilgidda Velair Warangal	Vishākhapatnam
	Guhagar, Satara Sangli	Bijapur, Sedam Hyderābād Tuni	
المر امري	Karvir _{(Gadhin}	glaj Sirvār Srirangapur Vinukonda	
	GA 41 H KARP	ubli-Dhārwād Nandyal ANDHRA PRODESH Mandal	Bay of Bengal

• **No Boundary**: This option creates heat map based on density of the measure selected without geographical boundaries.



				_
Select Datasource		Select Display		_
Accounts ~	All Accounts	✓ No Boundary	``	~
Select Measure				
By Count		~		
Select Filter				
Account Name		~		
			Search	
	Heat Map	o Templates		
			Contraction of the second s	
		n.Sr		
		* 15		
NORTH AMERICA				ASIA

Heat Map Templates

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• Once all the Heat Map is generated by selecting the Data sources of any entity, you can check the records in the Summary Card and save the heat map as a template.

· Soile





- By clicking on the 'Summary Card' icon, you will get the total records with the data source details.
- By clicking on the 'Save' 🖥 icon, you can save the Heat map as a template for future use.



• If you want to replace with existing Template, click on the Update button, that will be replaced the heat map with new data sources.





- The template that is assigned as a default template will appear in the 'Template'. If you click on the Update button, it will replace with a heat map of the default template.
- Now, by clicking on the 'Templates', you will get the list of the saved templates of the different heat maps.

Templates	×
Show 10 v entries	
Map Templates 🗸	Action
Account Report	© <mark>₫</mark> +
BA	◎ [†] / _□ +
Open Revenue	◎ 🛍 +
Showing 1 to 3 of 3 entries	\leftarrow Previous 1 Next \rightarrow

• To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the Heat map, it will load that default template.

By clicking on the view \checkmark icon, you can view the data source of that template on the heat map. You can also delete any unwanted Heat Map template by clicking on the delete \hat{m} icon.



Territory Management

Territory Management helps you to create territories through drawing, proximity, region and more. Also, you can plot the existing territories and copy or move them as required.

Click on the Territory Management section in the navigation panel and click on the Territory Management section present on the top of the page to create the territories.

Dynamics 365 MappyField 365	SAN	DBOX	ନ ହ + ଟ 🚳 ? ଉ (mm
≡ 📀	Territ	Draft Territory	Q)
© Recent ∨ Sirjan Bam Jaredan	Territory Management		Xigazé Sha
Azure Map Bandar Hannahak	Search Options:	Select Entity	Cluster
ADDas Map	By Region	✓ Select Entity ✓	Sursand Birätnagar
As Al Khaimah	Region:		ipura Badarganj Ulipur
Google Map Ubai Chabahar	City	~	Plot Da BIHAR Mithapukur MEGHALAYA jdishpur Muktadacha Syli
Map Map Al Sohar See of Omen	City: •		HARKHAND BANGLADESH
A Territory Management	Enter city		sansol west report
Scheduler Nizwa Sur			ur Kolkata Barisal
Work Order Scheduler	Shape Fill Previe	w	oâmundi Galachipa Cox's
OMAN	•		Soro Baleshwar Bazar U
and the set	Opacity 0.5		Bari Raj Kanika Bhubaneshwar
	Shape Outline		apur
	Border Width 3		am A
	Opacity 0.5		
بحر العربي			+
0		CA -1 Hublinharward Nandyal	o
M Map 🗘		RAPATAKA PROBAL	Bay of Bengal
		Davallyci,c Taluka	62025 GsM 62025 Grabitasi 62025 Navinto 62025 tomitom

There are various options to create the territories and those are :

By Region - This option helps the user to select territory according to different type of regions i.e. County, State, City and Postal Code.

You can add multiple values using comma.

Territory Management	
Search Options:	
By Region	~
Region:	
State	~
State: *	
texas, georgia, illinois	





By Drawing - To select territories there are various shapes present like Polygon, Circle, Rectangle and Freetool. Different colors can be selected to draw around the region and the border color can also be selected.



By Territory - In this option, various territories are present that have been created. You can select one or more territories according to your need.





By Proximity - In this section, there are two further options : Distance and Time.

- **Distance** : There are three sections that need to be filled. In the first section, a value between 1 to 99 should be entered. Further, you have to choose between Kilometers and Miles

Next, Location has to be entered, either manually or by plotting it on the map.



Territory Managemer	t Draft Territory	
Search Options:	Select Entity	◯ Cluster
By Proximity	Accounts 🔹	All Accounts 💌 🗙
Distance Time	+Add Legend	
70 85 99	By user/team	
lote : Please enter a value between 1 to 99.		
Kilometers		Piot
Texas, United States		
lote :		
earch location manually or for precise location Right click on the map to Add to Location".		
PEDIBLIC OF	20X	

Such a view will be displayed after filling up all the details in the Distance section :



- For example : The location entered here is New York, United States and the values entered are 70, 85 and 99. So, the purple color shows the area that is covered from New York to the radius of 70 kilometers. Similarly, green and orange color covers an area from Texas to the radius of 85 and 99 kilometers respectively.
- Time In the Time section you have to enter a value between 1 to 60 (in min) and also a location. You can either enter directly or can plot the location on the map and then after saving that location you can enter it on that particular field.



×

Territory Management

Search Options:	Select Entity		Cluster
By Proximity ~	♥ ✓ Accounts ✓	All Accounts	~ 🗵
Distance O Time	+ Add Legend		
55	By user/team		
Note: Please enter a value(in min) between 1 to 60.		_	
texas, united states			Plot
Note: Search location manually or for precise location Right click on the map to "Add to Location".			

Based on the above configuration, if any territory comes under the area which can be covered from Texas in 55 minutes, it will plot on the map.

When the details in Time section are filled, such a view is displayed :





By File - To create territory through this option you have to select a file that states all the information required.



Territory Management

By File	~
Select File: 🚯	
Sample (5).csv	Upload
Sample CSV File	

According to the data grid will get appeared



Here, select the required region and click on plot.





The territory will be plotted according to the regions selected from the grid.



To the right, there are various entities mentioned from which the user has to select one. After selecting the Entity select the Entity view.

If you want to add more Entities and Entity Views then click on the + Add Legend button.



\bigotimes	Territ	ory Management Draft To	erritory		
Boctoven Guildiporce Ange	Basket See	Baffin Bay		X	Sepanness sepa
Чухотское море	Territory Management			×Z	
	Search Options:	Select Entity		Cluster	
all the state	By File	✓	s 🗸 All Accounts	✓ ⊗ ^{ML7} / _{AND}	
Берингово море	Select File: 🚯		All Contacts	V Q	Same and the contract
*ホーツク湾	Sample (5).csv	Upload	1	LARU	2 Pro Eman
Pacific O	Sample CSV File	 Add Legend State City By user/team 	y OPostal code	Plot	AIRE SALAMETAN INFORMATION TURKYET TOMANIMUM SALAMETAN TURKYET TOMANIMUM SALAMETAN TURKYET
6	MEXICO	CUBA AVIU - PR	Lifeson MALL	NIGER SUI	AL 'ARABIYAH AS OMAN
a		COLOMBIA SUBINANCE	CUINE GHAN	ASO NIGERIA CÁMEROUN CAMEROUN	SUDAN SOMALI OGANDA REPUBLIC O
JUGINI		Show Data	(Var	DÉMOCRATIQUE DU CONGO	62025 TomTom 62025 Navinfo 62025 OSM

The territories can be assigned with various colors as per your convenience. Through the Shape Fill option you can select the color and the opacity can be set from the Opacity section.

Also the color, width and opacity of the outline of the territory can be selected through Shape Outline, Border Width and Opacity respectively. In the Preview section the color that has been selected is displayed.

Search Options:			Select Entity			🔿 Clu
By Region		~	♥ ✓ Accounts	~	All Accounts	~ (
Region:			Contrate		All Contrata	
City		~	Contacts	Ť	All Contacts	· · ·
City: *			(+) Add Legend			
city.						
•			By user/team			
texas			By user/team		_	
texas			By user/team			Plot
texas Shape Fill		Preview	By user/team			Plot
texas Shape Fill		Preview	By user/team			Plot
texas Shape Fill Opacity	0.5	Preview	By user/team			Plot
texas Shape Fill Opacity	0.5	Preview	By user/team			Plot
texas Shape Fill Opacity Shape Outline	0.5	Preview	By user/team			Plot
texas Shape Fill Opacity Shape Outline	0.5	Preview	 By user/team 			Plot
texas Shape Fill Opacity Shape Outline Border Width	0.5	Preview	 By user/team 			Plot

In the above portion, steps to create and plot the territories on the map have been mentioned.



The Location pin is used to mark the selected entities. You can change the pin color to bifurcate easily on the map.

There are four colors you can choose from : Red, Green, Pink and Blue. Three different shapes are also available. You can also add other pins by clicking on the add button; it is mentioned that only SVG files should be uploaded. A sample file is also given.

Territory Management				×
Search Options:	Sele	ect Entity		Cluster
By Region	● 、	Accounts	✓ All Accounts	~ 😣
Region:		Contacts	All Contacts	× 🛛
State	~ 			
State: *				
texas				
	+	· + + +		Plot
Shape Fill Previev	v			
Opacity 0.5				
Shape Outline				
Border Width 3				
Opacity 0.5				

After filling up all the details, the Plot option is selected in order to plot the territory and view the required entities.





When a territory is plotted three icons are displayed below on the left side. \bigcirc - This icon is to select the particular territory. $\mathbf{\hat{m}}$ - To delete any selected territory this button should be clicked. The third icon is used to refresh the entire page.



Create new territory

You can create new territory by right clicking on the regions that you have selected. After right clicking you will get these options:

Add to Parent Territory

Insert name for the present territory and select an existing territory for the parent territory.


+ Create new territory	×
Add to parent territory	
Please enter the name of territory	
Select Territory	
texas	~
 Combine with existing territory 	
Create new territory	
	Save

Combine with existing territory

۲

To combine the selected territories with the existing territories, this option is selected.

+ Create new territory	×
Add to parent territory	
Ocombine with existing territory	
texas	~
Create new territory	
	Save

Create New Territory

Insert the name you want to enter for the new territory as well as select the manager.



+ Create new ter	ritory	×
Add to parent terr	ritory	
O Combine with exist	sting territory	
Create new territo	bry	
Texas region		
Select Manager		
Steve Adams		

When all the required details are filled you can either save the territory or can save it as draft.

+ Create new terr	ritory	×
 Add to parent terr Combine with exis Create new territo 	itory sting territory ry	
Texas region		
Select Manager		
Steve Adams		~
	Save	Save As Draft

Draft Territories

While creating a territory you are provided with two options either to directly save or to save as a draft. Those territories that are saved as drafts are listed in this section. The list contains two columns :

Name - The name of the territories.

Action - There are three types of action you can perform:

- **View:** This action helps you to view the territory that has been saved as draft.
- Add: Clicking on this button, the draft territory will be added onto the Territory List.
- Delete: This deletes the territory permanently from the draft.



\bigotimes			Territory Management	Draft Territory				
E,	Red Arraw HWY					Vincent Ave		Inversion
		Draft Territory			×		W Milham Ave	Portage Creek
5	0	Show 10 v entries		Search:				
*		Territories List		↓ Action	B Gung.	Romence Rd	Romence Rd	Lovers
	County Road 364 Mattawan	drawing draft		0 1 1			Schuring Rd	5
60th Ave		GJ MH draft		© E Î			Portage	E Centre Ave
	Ree Internet	GJ RJ MH		© Ľ 1	tre A	we get t	SWeeth	
		Rj drafft		0 7 1			edge Ave	5-L
64th Ave		Texas Draft		0 2 1	-			West L
	County	Vadodara		o e i		akland D		Laker
6	Road 657	Showing I to 6 of 6 entries		← Previous	1 Next →	and a second sec		Bacon .
							W Osterhout Ave	+ E OsteAv
	8		Mudd Lak	0				



Google Map



Default Location

• You will get the default location with the pin $\stackrel{\bigcirc}{\searrow}$ on the map as per the configuration in Map Configuration Detail.



- You can set the **default location** from the Map by right-clicking on your specific location.
- As you right-clicked, the map view options will appear. Click on Save Settings 🛛 Default Location.





• By clicking on the 'Default Location', the pushpin the default location will be changed with a **new** address on the map.



Plot the records on Map

Select Entity

• By clicking on the **Plot**, you can plot the multiple records by selecting the different entities.

\bigotimes	Plot	Plot External Data	Routes	Templates	POI		ର 🗯	۵	96M4+4H Fountain Hill, AR, USA	× **
	Vancouver		NORTH				A A A A A A A A A A A A A A A A A A A		A	St Pie Miq
	Portland OREGON Boise	Bozenan Bilinga		Minneapo	blis	Toronto		Mon	real Nova scotia	
	NEVADA	Salt Late Select Entity		⊖ c	luster Searc	h Options:		× ~	ew York	
	San Francisco San Jose CALIFORNIA Las Veg	Select E	ntity V				Search			
	Los Angeles San Diego BAJA CALIFORM	ARIZON NEW MEZ Phoenix Tucson Ciudad Jua	rez	Dallas	MISSISSIPPI	BAMA GEORGIA	A		Bermuda	
		CHIHUA		n Antonio o Houston		Orlando o Tampa FLORIDA Miam	, ~ ` ` `			+ -
Google		CALIFORNIA SUR SINALOA DU	IRANGO Monterr	ey IAULIPAS	Gulf of America		The Bahamas		Keyboard shortcuts Map Data ©2025	Google, INEGI Term

• First, select **Entity** from the 'Select Entity' dropdown option. You will get the dropdown list of entities as per mapped in 🗎 **Entity Mappings** configuration.

Plot				Toronto	
Select	Entity	⊖ Cluster	Search Options:		New York
	Select Entity 🗸 🗸		Select	~	
Er (Select Entity				_
4	Accounts				
*	Cases			Search	
RIZO	Check Ins	N - 17 - 18 - 19 - 19 - 19 - 19 - 19 - 19 - 19	Audita	SUUTH	
noenix	Contacts	Dallas	SSIPPI	CAROLINA	
Tucson	Custom Loacations	TEVAS	GEORGIA	¥	
J.	Invoices		Jacks	onville	
SUNURA	Leads	San Antonio Houston			
Que Compt	Meetings		Ori	ando	
totoalling	R K K	NUEVO LEON	FL	orida	

• Select **View** from the 'Select Entity' dropdown option.



Plot	VANCAS	St. Louis	West A	DE Washington
Select Entity		Cluster	Search Options:	
♥ ✓ Meetings ✓	Select View 🗸	▼ ⊗	Select	~
	Select View			
	All Appointments Appointment Tooltips	s view		Search
N. S. L.	My Appointments	intmonto	FLORIDA	
SINALOA SUBANCO MONTEI	My Draft Appointmer	nts f of	Miami	The
Mexico TA	My Follow-up Appoin	tments	Ba Havana	ahamas

• After selection of 'Entity' and its 'View', you can Filter the attributes and plot the specific records of the selected attributes from the **Filter** option.

Plot	×
Select Entity ♥ ✓ Accounts ✓ All Accounts ✓ ↑ Add Legend	Select V
	Search

• By clicking on the **T** 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.



Denver • Unite	d States Kansas City	ILLINOIS INDIANA OHIO Indianapolis Cincinnati	
Plot			
Select Entity	T Filter	×	
Accounts			· · · · · · · · · · · · · · · · · · ·
Add Legend		~	
1	Account Name		
	Account Number		Search
	County		
	Preferred Method of Contact		Miami
A SUR SINALOA DURANGO	Monterrey TAMAULIPAS	America	The Bahamas

<u>Note</u>: You can plot the records on the map based on the attribute selection that are configured from the option of the 'Entity Mappings' in the Data Filter Attributes option.

• Once you have selected the Attribute, you need to insert its value. After selecting the attribute and inserting its relevant value to filter the records, click on the **Save** button.

Plot	T Filter	×	×
Select Entity	Preferred Method of Contact	~	~
Accounts	Preferred Method of Contact		
🕂 Add Legend	3 selected	~	
	Q Search	8	
	Select all	Clear	Search
	Any	~	
	Email	✓ hean See	
	Phone	 Internet 	
		Venezuela	

• By clicking on the **T** 'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.



\bigotimes	Plot	Plot External Data	Routes	Templates PC	וכ	Q 🗰 🌣	Ø 96M4+4H Fountain Hill, AR, USA
Ве	ing tau		AB	Filter detail so	ved	Labrador Sea	Norway United Denmark Kingdom Iretand Cermany Pol
		Plot				×	Austria). France
	North Pacific Ocean	Select Entity Image: Select Entity<		Cluster	Search Options:	~	Spain Portugal Morocco
8				Guatemala Nicaragua	Caribbean Sea	Search Click on this t	Western Sabara Dutton to search records Guinea Mail Niger Cuinea
				Eq Show Data	Colombia Liador ru no E	a riname res res res trazil tro to tro to tro tro to tro to tro tro tro tro tro tro tro tro t	Keyboard shortcuts Mop Data 62025 Google, INESI Terms

- By using the custom filters, the DynamicsCRM users can plot records between the dates or plot records with the specific status as per configuration in the **Data Filter Attributes** option from Entity Mappings.
- Now, click on **Search** button to plot and view the records of the selected entity **on the map**.
- All the records of the 'Accounts' are plotted on the Map which is highlighted in the red pushpin $^{\heartsuit}$



- In this way, you can plot the records by selecting the **Entity** and its attribute in the **View**. The records will be plotted as per the filtered attributed as you have selected the Filter option for the Entity.
- The multiple entities selection option is also given to plot and view the **multiple records** on the map.



• To select another 'Entity', click on + Add Legend text caption. As you click on it, the "Select Entity" option will be added.

Plot			×
Select Entity ♥ ✓ Contacts ✓ My Active Co ↔ Add Legend	Cluster✓ ▼ ⊗	Search Options:	~
			Search

• Now, select another **Entity** and select its **View** then click on **Search** button. You can also filter the attributes of the selected entity to plot the records on the map.

Plot	×
Select Entity Cluster Contacts My Active Co <th>Select ~</th>	Select ~
	Search

- You can plot the records by selecting multiple entities, but you can select a maximum of **5 Entities** at a time.
- On selection of more than one entity, pins with different colors ? get plotted based on the records of entities. On map, Accounts are plotted in red pin ? and Leads are plotted in green pin ?.





• If entities like Account, Contact or Lead are mapped under the 'Entity Mappings' configuration, only then you can select those entities and plot the records on the map.



10:01		[4]
Dynamics 365	Q	: (MY
\bigotimes	Q 🗎	\$ ∃
GF5H+2P Isabel, KS, USA	A.	\otimes
canada trific ean unit Mesco		North Atlantic Ocean
	Venezuela Colombia	
B South	Peru Bolivia Chile	razil S
i≡ Pacino Ocean Ø	Argentin	+
Google Show L	Map Data	C2025 Terms
	Ш	-0

The Sales Reps/Executive (DynamicsCRM Users) can also access the MappyField 3365 from the mobile/tab.



Pin selection for records

- Every time when you add a new entity the pin will be added with a different color.
- Multiple pin **9** options are also available to differentiate multiple entity (legend) records, options will be listed by clicking on the existing pin.
- You can change the pin color and its shape by clicking on the pin \heartsuit of any entity. Select different pins for the multiple entities to differentiate the records on the map.

Plot			×
Select	t Entity	Cluster Search Options:	~
v ●~	Accounts	 ✓ All Accounts ✓ ✓ X 	
• •	• • •		
₽ +	♥ ♥ ♥ + + +		Search

• You can also add your custom pushpin icon by clicking on the plus + icon. You need to select the SVG file.

	Plot	Select Custom Pin	×		
Pacific (Select Entity	Note: The selected file should be SVG and height and widt	th of the svg		
deme c	 Accounts Contacts 	should be 30 px and 20 px respectively. Download SVG Example			
		Choose File	Upload		54. 1
	• • 9 •	Sav	ve Icon	Search	STRALL
Į	+ + + +			Bearch	



Cluster Map Records

• For all the pins added on the map, there is an option available to cluster them.

Plot							×
Select Entity				O Clu	uster	Search Options:	
✓ Accounts	s ~	All Accounts	~	•	\otimes	Select	~
🕀 Add Legend							
							Search

• By selecting the Cluster option, the pins will get clustered based on the proximity. It will make a group of nearby pins indicating the number of markers.



Note:

- On zooming in to the map, the number of pins in the cluster decreases and you get to see individual markers on map.
- Whereas, when zoomed out, it consolidates the markers into clusters again.





• On clicking any cluster (no. of groups), it will zoom in to the pins.





Plot External Data

\bigotimes	Plot	Plot External Data	Routes Tem	plates POI	c	२ 🗰 🕯	96M4+4H Fountain Hill, AR, USA	". (S)
Mi	neapolis	MICHIGAN		Ottawa Montreal	MAINE		NOVASEOTIA	
I	WA Chicago		Plot External Data		×			
			Select File: 🚯					
	ILLINOIS	INDIANA	Choose File		Upload			
X7	Indiana	polis	Sample CSV File					
insas city	St. Louis MISSOURI	Cincignati			Upload			
		KENTUCKY	VIRGINIA					
	Nas	hville	120-2-1	22				
	TENI	VESSEE	NORTH					
	VRKANSAS MISSISSIPPI	Atlanta	SOUTH CAROLINA					+
Google	ALA	BAMA		Show Data		P	Keyboard shortcuts Map Data 62	2025 Google, INEGI Terms

In order to plot data through external records, navigate to the Plot External Data section.

Here, you will be able to download a Sample CSV file.



Within this sample file, you can enter the details as per your requirements. Also, you need to make sure that the title of each column should remain unchanged.

	A	В	C	D	E	F	G	H	1 I -	J	K	L	M	N	0	Р	Q	
1	Record Na	Latitude	Longitude	Street1	Street2	City	PostalCod	State	Country	Job type	Company	Education	Email	URL	Phone Nur	Status		
2	Darren Gro	39.87	-117.22	3200 S. La	as Vegas Blv	Las Vegas	89109	NV	USA	Manager	Biztech	MCA	Test@gma	www.goog	7.57E+09	TRUE		
3	Adam Smit	45.36	-68.97	3309 Espe	eranza Cros	s Austin	78758	ТХ	USA	Teach Lea	Biztech	MBA	Test@gma	www.goog	9.43E+09	FALSE		
4	Jack Carte	44.18	-84.5	3000 Bay	port Dr	Tampa	330607	FL	United Sta	Senior Dev	Test	MCA	Test@gma	www.goog	9.33E+09	TRUE		
5	james sans	32.65906	-96.7638	3456 B So	u 1200 mair	n Dallas	75073	Texas	United Sta	Manager	Test 12	MBA	james@gn	nail.com	8.96E+09	FALSE		
6																		
7																		
8																		
9																		
10																		
11																		

File can be uploaded by clicking on the Choose File button.



Sample CSV File	opioud
Sample (6).csv	Upload
Select File: 🚺	

Once the Upload button is clicked upon after uploading the file, a pop-up to select Attributes appears. Attributes to be displayed on Tooltip, Details, Datagrid and Filter are to be selected.

Click on Save once the attributes are selected and the data will be plotted on the map.



Import Data

In the *Data Grid* there is a button on the left side through which you will be able to import the data onto your system.

Now, in order to do so, select the records among those that are displayed and then click on the import button.



$\overline{\mathbf{v}}$	>	Pl	ot Plot	t External Data	Routes	Templates	PO	I	C	2 🗰 🌣	0	96M4+4H Fountain H	iill, AR, USA	× **
				Canada Al os Ur to Ur to So Ur No			NL I Pata	Labrador Bes			ireland	Norway United Denmark Kingdom France Germany Trance Train Train	Poland	inland Belarus Ukraine mania
1														
Sear	rch:										0 C	copy Excel	PDF	🖶 Print
☑ ↓	Record Name \downarrow	Latitude \downarrow	Longitude \downarrow	address			\downarrow	Street1	\downarrow	Street2 ↓	City	↓ PostalCode ↓	State 🗸	Country 🗸
	Darren Grover	39.87	-117.22	3200 S. Las Vegas Blvc	lLas Vegas89109N	IVUSA		3200 S. Las Vegas Blvd			Las Veg	as 89109	NV	USA
<	Adam Smith	45.36	-68.97	3309 Esperanza Cross	ing Suite 104Austi	n78758TXUSA		3309 Esperanza Crossing Suite 104			Austin	78758	ТХ	USA
	Jack Carter	44.18	-84.5	3000 Bayport DrTamp	a330607FLUnited	States		3000 Bayport Dr			Tampa	330607	FL	United States
	james sans	32.65906	-96.76378	3456 B Southampton States	Rd1200 mainDalla	Is75073TexasUnited		3456 B Southampton Rd		1200 main	Dallas	75073	Texas	United States

A pop-up will be displayed where you need to select the entity and accordingly the table below will be updated. The data in the table can be configured as per your requirements.

\sim		Pl	ot P	Select Entity			×	© 96N	14+4H Fountain H	ill, AR, USA	» *
				Select Entity:					Norway		nland
			1	Account	~			·Č			
فيتحسب			E I	CSV Field's	Data Types	Format	CRM Field's	C Unit Kingd	ed Iom	Daland	Belarus
				None Selected V	None Selected V	None Selected V	name		Germany		Ukraine
			OR Contraction of the second s	Record Name	None Selected V	None Selected	None Selected	3 Spain	France Italy	Rom	iania
1)			Latitude	None Selected V	None Selected	None Selected V			· ·····	
Sear				Longitude	None Selected V	None Selected V	None Selected	() Сору	Excel	D PDF	🖶 Print
✓ ↓	Record Name ↓	Latitude 🕹	Longitude	address	None Selected V	None Selected V	None Selected V	\downarrow	PostalCode 🗸	State ↓	Country ↓
			-117.22	Street1	None Selected	None Selected V	None Selected V	vegas		NV	USA
		45.36	-68.97	Street2	None Selected	None Selected	None Selected	in		тх	USA
	Jack Carter	44.18	-84.5					ipa			
			-96.76378				Save	as			

Once the data is imported, a success message will be displayed stating such.



Map view Quick options

- You will find some quick actions from the header menu of the activity map. The Quick actions are:
 - Calendar View
 - MappyField365 Configuration



• It will be easy to perform some action from the map itself, you will not require to navigate the individual options.

Full Screen

• From the right side on the MappyField365 header, there is an option for I Full Screen View.



• You can enter the Full screen view **through** this option.





• By clicking on the 'Full screen' icon, the map view will open in the Full screen view.





Advance Options

• From the left side of the MappyField map view, there are **Advance** options given related to check, manage and configure the records on the map: **Save Template, Marketing List, Category Search, Summary Card** and **Refresh.**



Save Template

- All the plotting data made along with zoom level configurations can be saved as a **Template**.
- By clicking on **Save Template** icon, a dialog box opens to give a name to the template. Moreover, you can select the box **Is Public** to make the template public. To save the existing template, click on the **Update** button.



• After inserting the Template name, click on **Create new template** button to save the template for future reference.



• You can check the saved templates from the **Templates** tab from the header.

\bigotimes	Plot	Plot External Data	Routes	Templates	POI	Q 🗮 🌣		[:] ountain Hill, AR, USA	× **
		Templates				Networker Passages		Greenland	A CONTRACTOR
	Bering Sea	Show 10 v e Map Templates	ntries		↓ Action		Labra	dor See	
× •	and the second and the	new temp2	late		© î + © î +	-			
8		Showing 1 to 3 of 3	entries			revious 1 Next →	NS		
	North Pacifi Ocear			Sho	Mexico	Cuba	rto Rico	North Atlantic Ocean	+ -

- To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the activity map (Map), it will load with the default template records.
- By clicking on the view 📀 icon, you can view the records of that template on the map. You can also delete any unwanted template by clicking on the delete 🛍 icon.

Marketing List

- Marketing **lists** contain the members like Account, Contact or Lead records. You can add the MappyField 365 data in any marketing list to market the specific segments more effectively.
- By clicking on 'Marketing List' icon under the "Select Entity" option, you will get the Add to Marketing List popup window.





• You can get the "Marketing List" by clicking on Search icon Q if it has already been created in Marketing -> Marketing List or you can add to a new list by selecting the "Add to a new list".



Note: At a time only the single entity records can be assigned to the Marketing List.

Category Search

- You can perform Category Search on single as well as multiple entities.
- Performing this search will list out all attributes of the selected entity. These attributes visible in the category listing dropdown can be managed under the **Entity Configurations** section. Next, you need to select **attributes** based on which record should be plotted. Here, it would show a dialog box for attribute selection for each entity.



8 E _		
J.	E Select Category	×
	Account	
	Preferred Method of Contact	~
	All selected (5)	~
	Contact	
	Full Name	~
		Search
1 2 E	1	
C Google		

• By clicking on the 'Search' button, the data will plot pins as per the selection of attributes. You will get the list of selected categories entity-wise on the right side of the map (Infobox).



• You will see the categorized records with the number of records.

Summary Card

• Clicking on **'Open Summary Card'** icon, you can view the total number of records and other entity related details plotted on map as configured from the back end.





Refresh



By clicking on the Refresh icon, the MappyField map and plotted records will refresh and load again.



Search Options

- You can plot the records of particular **entities** based on different **Search Options**.
- You can search and plot the records based on **five** Search Options:

RegionProximity	DrawingBy User/Teams	[]	2 Territory
Plot Plot External D	ata Routes Templates User Tracking POI	Q 🚔 🏟 🎯 Gillette, WY 82716	** 💬 "*
	Plat		No Provention
	Select Entity Cluster Search	ch Options:	NB PRINC EDWAF ISLAN VT MAINE NOVA SCC
	Image: Accounts Image: All Accounts	ect NY gion awing	
CALLE CALLE	Tern Pro: By l	ritory ximity Users	ure
	ARIZONA NEW MEXICO	AS SC ALABAMA MISSISSIPP GEORGIA	• + -
3	Lou		©2024 TomTom ©2024 Navinfo ©2024 OSM

By Region

- By region option lets you plot records on the map based on the region of your choice.
- The various regions that you can select one from are **City**, **State**, **Country**, and **Postal Code**.

\bigotimes	Plot	Plot External Do	ata Routes	Templates	User Tracking	g POI	Q 🛱	۵	Gillette, WY	82716	\otimes
		4.5								7.1	
		WASHINGTOP	Plot						×		pin
			Select Entity			Cluster	Search Options:			1	VT MAINE
		OREGON	✓ Accounts		ccounts ~	▼ ⊗	Region		~		
			♥ ✓ Contacts	✓ All C	ontacts 🗸	▼ ⊗	Region:			NY	
			+ Add Legend				Select		~	$\int r$	
			0				Select				
							City				
		CALIF					State				
							Country				
			ARIZO	IA NEW MEXI	c0		Postal code	1			

• If you select the State, you need to insert the 'State' name for that you need to check the records on the map.



Search Options:	
Region	~
Region:	
State	~
State:*	
Texas	

User can also plot multiple regions in map by adding comma (,) separated values. For example: Texas, Tennessee.

• Now, by clicking on the **Search** button, only the inserted states get highlighted on map along with the records that come under that states.



- By clicking on any shape, it will **display a Summary Card for the selected** shape.
- You can see details in the Summary Card of the selected State.





- By clicking on the close X icon, the state will deselect.
- You can also manage the Territory when the **Region** search option is selected and records are plotted on the map.

<u>Note</u>: You can create and manage the Territory from the individual option of the "Territory Management".

By Drawing

• You can plot the data by defining your own shapes. By selecting the Drawing search option, the drawing tool will enable you to draw the following shapes: Polygon, Circle and Square.

elect	Entity				Clu	uster	Search Op	tions:		
•	Accounts	~	All Accounts	~	▼	\bigotimes	Drawing			~
••	Contacts	~	All Contacts	~	▼	\bigotimes	Ъ O		æ 🛑 (
D Add	dLegend									

• For free drawing select the 'Polygon' shape, just by single clicking on the map drag the mouse cursor the shape will be drawn. You will get the records as per your drawing on the map.





- You can edit the drawn shape by selecting 'Edit' icon. After selecting Edit icon, you can move the shape and increase/decrease the area of the shape.
- You can remove the drawn shape by selecting "Erase" ${igodot}$ icon and then click on the shape.

You can change the fill color and the outline color of the shape.

The color picker option is given to change the color of both.

Jean		/10/13	•				
Dro	wing						~
맙	0		G ¹	٩		ullet	
					0		

By Territory

 You can also view records on maps based on **Territory**. By selecting the 'Territory' in search option, you will get the list of Territories in the dropdown.

Search Options:

Plot						×
Select	Entity			Cluster	Search Options:	
•~	Accounts	~	All Accounts	~ T 😣	Territory	~
•~	Contacts	~	All Contacts	~ ▼ ⊗	Territory:	
⊕ Ad	d Legend				2 selected colorado	~
					georgia	
					Mauahemdaba	d I
					new prox terr	
-	2			}	texas	 Image: A set of the set of the
				(TRRR	

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- Select the Territory/Territories the records of which you want to display on the map.
- Now, on clicking the Search button, all records that fall under the selected territory will be plotted on map.

<u>Note</u>: This dropdown would show those territories also that are created under the Territory Management section *or* from Settings -> Sales Territory -> Business Management.





<u>Note</u>: To select territory, territories should be defined by you along with their territory manager in CRM.

- To manage territories, follow these steps: Settings > Business Management > Sales
 Territories.
- Also, territories reflect based on territories created under the territory management section.

By Proximity

- It lets you view nearby records in proximity from current location based on Distance.
- You can define distance either in miles or kilometers.



 DynamicsCRM users can also search the records using the 'Proximity Search' from the mobile or tab.



By User/ Team

• You can search and plot the entity records based on **Users** and/or **Teams** from the 'Search Options'. It would plot all records that are created by the individual User or the Team.



• By clicking on the **Search** button, the records of the selected user will be plotted on the map.

<u>Note</u>: This search option is available only to users who have admin roles.

Map View options

• There are many options and actions provided to manage the map records easily from the Map View.

Details on Hover

You can view record name by hovering on any pushpin. Information shown on hover is completely customizable from the Entity Mapping.





Tooltip Details

• By clicking on any specific record \mathbf{Q} (pin), you will get details related to that record based on **configuration** from the backend. By clicking on that, the details of the Slider will open from the right side.



• From the records detail card from the slider will let you perform different actions related to the selected record.



×

For the selected record, you can set the direction by defining the Origin or Destination.

Alpine Ski House

Argyle Bartonville TX 76226 United States

Additional Rests

Education stream:	_
Add to Origin Add to Destination	
Continued Investment	
L sugerierer	
and the manufacture of the	
Readering Search	
 Material Internal 	
Counter Name Autority	
California Managerial	
Rat Dr. Damand Baddhau	
 and/income 	

You can Share & Assign the selected records by:	Alpine Ski House × Argyle Bartonville TX 76226 United States
> Sending Email	Education stream:
> Assigning Owner	Add to Origin Add to Destination
> Add to Marketing List	Send Email
	🛃 Assign Owner
	📢 Add to Marketing List
	 Readering Search
	 Pages of collected
	E Couple New Activity
	E International
	B Aut In Densed Wolflag

<u>Note</u>: These actions are present by default on record of every entity and these buttons cannot be changed.



There are some other actions that can be enabled/disabled from the Security Template	Alpine Ski House X Argyle Bartonville TX 76226 United States
configuration.	Education stream: -
Other Actions: > Proximity Search	Add to Origin Add to Destination
> Point of Interest	🖂 Send Email
> Create New Activity	🎝 Assign Owner
> Delete Record	📢 Add to Marketing List
> Run On-Demand Workflow	Proximity Search
> Add /View Note	Q Point of Interest
	+ Create New Activity
	Delete Record
	Run On-Demand Workflow
	⇒ Add/View Note

Note: Other than these, there are few actions buttons like Check in and Check Out that are dependent on the selected entity.

Proximity Search

From the detail cared of the selected record, Proximity Search lets you to view nearby records in proximity of the selected record based on time or distance.

Alpine Ski House X						
Argyle Bartonville TX 76226 United States						
Education stream:						
Add to Origin Add to Destination						
🖂 Send Email						
🍃 Assign Owner						
📢 Add to Marketing List						
Proximity Search						
Q Point of Interest						
+ Create New Activity						
Delete Record						
Run On-Demand Workflow						
=, Add/View Note						



Proximity Search





You can define distance either in **miles** or **kilometers** as well as **time** in minutes.

You can also perform concentric proximity search based on distance with three different values.

Here on defining search criteria of 75, 85,95 Miles, it will plot records situated in 75, 85, 95 Miles area from current pin location.

Also, you can search in proximity from single entry as well.

On hovering over pin, you get details as configured along with travel distance in case of search based on distance.

Point of Interest



You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. from the Point of Interest.

It will take the address of the selected record as POI location to search nearby places.

After selecting the specific Point of Interest options, click on the GO Button. The selected POI options will plot on the map.




Create New Activity

• You can create a new activity for a record by clicking on the "Create New Activity" icon associated with a specific record. For example, let's create an appointment.

\odot		Plot	Plot External Data	Routes	Templates	POI		० 🗰 🕏	•	♥ WW7G+XM Pleasant Ridge, IN, USA ⊗	e ⁿ
-63 			COLORADO		KANSAS	MISSOUR		Cincinnati	Pe f Gal	t er veston TX 77590 United States	×
	Las Vegas							Nashville TENNESSEE	Ad	d to Origin Add to Destination	
					34. E		Memphis			Send Email	
Angeles			NEW MEXICO	🛨 Crea	te Activity		×	Avoita	2/	Assign Owner	
San Die	o Phoenix							ALAB	4	Add to Marketing List	
×	Tu	cson		Select Activ	vity	Meeting	~		Û	Delete Record	
			Ciudad Juárez						•	Proximity Search	
									Q	Point of Interest	
							Create			Create New Activity	
				A CASE						Run On-Demand Workflow	
									-	Add/View Note	
Ă											
				Monterrey							
1=			Mexic	CO TAM							
Google											

Select the Appointment from the select activity and fill the required fields to create an appointment.



Quick Create: Mee	tir	ıg	$\left \times \right $	
Owner	*	Mike Young ×	Q	
Required Attendees			Q	l
Optional Attendees			Q	l
Subject	*			l
 Location				l
Teams meeting	(No No		l
APPOINTMENT DETAILS				
Start Time	*	10/23/2024	:::	
		12:00 PM	\sim	
End Time	*	10/23/2024	:::	
		12:30 PM	\sim	
All Day Event				
		Save and Close 🗸 🗸	Cancel	

- Appointment should have a subject and time details.
- The appointment that is added can be viewed in a detailed view of record in Dynamics CRM.

Delete Record

• By clicking on the delete button, the selected record from the map gets deleted from the CRM.



Run On-Demand Workflow

You need to ensure that the workflow should be "As an On-Demand process" and its scope should be "Organization".

Navigating to Run On-Demand Workflow.





A pop-up would display where you need to select the workflow and click on Execute.

\bigotimes		Plot	Plot External Data	Routes	Templates	POI	् 🗎 🕈	💿 WW7G+XM Pleasant Ridge, IN, USA 💿	e.
			COLORADO		KANSAS	City St. Louis MISSOURI	Cincinnati	Peter Galveston TX 77590 United States	×
	Las Vegas							Add to Origin Add to Destination	
Angeles	Phoenix			🗈 Run	On-Demand Workfl	low	×	Send Email Send Email Add to Marketing List	
	Tucs	ion	Ciudad Juárez	Workflow:	None		GEO	Delete Record Proximity Search	
					Account - add e	mail Execute		Point of Interest Create New Activity Run On-Demand Workflow	
								≂, Add/View Note	
			UNALOA DURANGO	Monterrey					
Coogle			NAVARIT	SAN LUIS POTOSI					

This would trigger the selected on-demand workflow.

Add/View Notes

• You will be able to **Add/View Note** by selecting the respective option. A pop-up consisting of Add Note form is displayed where you would need to enter all the needed details.



=, Add Note	×
Title	
Changes needed	
Enter A Note	
Changes needed	
Select File: 1	
timesheet.entery.line.xlsx	Upload
	Add

• Once you add the note, it will be displayed below the form. From the saved note, you can download the files attached to the respective notes by clicking on it.

=, Add Note	×
Title	
Enter a note title	
Enter A Note	
Enter a note	
Select File: 1	
Choose File	Upload
Changes needed	
Changes needed	
<i>imesheet.entery.line.xlsx</i> Mike Young 10/23/2024 12:02 PM	
	Add

Direction



By clicking on the **Directions Add to Origin** option, address of that record will be added as starting point in **Routes**.

From Routes tab you will get address of your customer's location.

• On the map, the 'Starting Point' will be assigned as **A** with the address of that record displayed.



\bigotimes	Plot	Plot External Data	Routes	Templates	POI	۹ 🛱	\$	♥ WW7G+XM Pleasant Ridge, IN, USA ⊙	**
Str. IV		COLORADO	KANS	Kansas SAS	S City St. Louis MISSOURI	KENTUCK	nati Olivic Colem	3 Brown an TX 76873 United States	×
Las Vegas	×.	Routes					×	igin Add to Destination	
Angeles	NA	🛋 rk 📣 🖶		Optio	ns			Email 3n Owner	
San Diego Phoenix	ucson	O Coleman, 76873, TX, Unit	ed States	Shores Route C	rtest time Shortest d	distance		to Marketing List te Record	
BAJA CALIFORNIA	SONORA	Enter Waypoint Your Location		Avoi Avoi Avoi	id highways id tolls id ferries ords along the route			of Interest te New Activity	
		Share Route 🕲 Save	Route 🕑 Navig	ate Route	View	w Saved Routes >	Go	View Note	
	A SUR	SINALOA DURANEO Mex NAYARIT	Monterrey ICO SAN LUIS POTOSI	Show D	Gulf of America		ş		
Add to Origin Add to t	Destination	<u>.</u>		By clic option that re	cking on the other of the other othe	he Add to er records, th be added as	Destir ne addr s desti	nation ress of nation	

• You can select the **Origin** and the **Destination** between the plotted records from the **Directions** option and manage your route based on that direction.

Plot	Plot External Data Rout	es Templates POI	Q 🗎 🌣	🛞 WW7G+XM Pleasant Ridge, IN, USA 🛞 🧋
BIA SIL UTAH	COLORADO	Kansas City KANSAS St. Lo MISSOURI	cincinnati Pi KENTUCKY	eter X alveston TX 77590 United States
Las Vegas	Routes			X igin Add to Destination
Angeles	■ † ⊕ ₽	Options		Email 3n Owner
San Diego Phoenix Tucson	O Coleman, 76873, TX, United State	s Route Option	rtest distance	to Marketing List te Record
BAJA CALIFORNIA SONORA	Galveston, 77590, TX, United Stat	es Avoid highways Avoid tolls		mity Search of Interest
	Add Location Your Location	Avoid ferries Records along the rout	ie	te New Activity Dn-Demand Workflow
	Share Route (B) Save Route	(e) Navigate Route	View Saved Routes > Go	View Note
BAJA CALIFORNIA SUR	SINALOA DURANGO MO	nerrey TAMAULIPAS	Gulf of America	
	NAYARIT	ANUUS POTOSI Show Data	P	

• Click on the **GO** button to check the routes between selected **Origin** and **Destination** on the Map.

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Send Email using Template



 The email templates list would have a list of all the templates that are created within the CRM and custom templates as well. You may select from the list or select New email to create a new one. Selecting template would directly perform the mail action if email id is available. While creating a new one would redirect to the CRM email screen.



🖂 Send Email	×
Select Email Template	
New Email	~
	Send Email

<u>Note</u>: If the user to whom the mail is being sent is not operating the email address, then the mail won't be sent and an error message stating that record's email address is not active will be displayed.

Assign Owner

Add to Origin Add to Destination	From the 'Share & Assign', you can Assign Owner for the selected record.
🖂 Send Email	You can assign any record to specific user or team by clicking on "Assign Owner"
🍃 Assign Owner	option from specific user's details.
Add to Marketing List	

• Selecting the Assign Owner option, it opens a dialog box where a dropdown list of all the CRM users is provided to select the user or team as required. After selecting the appropriate User/Team, click on the **Assign** button.

ᅪ Assign to User		×
John William		~
	Assign	Cancel

<u>Note</u>: When assigning a record to a user or team, that specific user or team should have a role assigned to it or else the record won't be assigned.

Assign to Marketing List

• You can add to the marketing list by clicking on the specific option.



Ad	d to Origin Add to Destination
	Send Email
2/	Assign Owner
4	Add to Marketing List

• On clicking, you will have the option to **add a record** either in existing marketing list or create the new one.

📢 Add to Marketing List	×
Select marketing list in which you like to add record	
 Add to an existing list 	
Add to a new list	
	Q
Add Co	ancel

• After selecting the marketing list, click on the Add button to complete the addition of records to the marketing list.

<u>Note</u>: Assign to marketing list icon under map section, will assign all records of particular entity to the list. Also, it will get assigned only when records of single entity are plotted on map.

Qualify/Disqualify Lead

• By clicking on "Qualify Lead" icon, status of lead will get updated to close state and user will be redirected to the opportunity page from the map. It is available only for record of lead entity.





<u>Note</u>: Open leads will display option to qualify/disqualify leads. Once leads are qualified, those leads will be shown in Closed Leads view.

Disqualify Lead

• By clicking on "Disqualify Lead" icon, leads will get disqualified and its status will be changed to close.





• Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Canceled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.

Run On-Demand Workflow	
Lost	
Cannot Contact	
No Longer Interested	
Canceled	
Lost	~

• Disqualified leads can be reactivated by clicking on Reactivate Icon present with closed lead record.

Reactivate Lead

• By clicking on "Reactivate Lead" icon, leads will be reactivated, and its status will be changed to Open.

	Michael Johnson X Will IL United States
ONTARIO QUEBEC	Owner: Mike Young Add to Origin Add to Destination
NESOTA WISCONSIN IOWA ILLINOIS INDIANA KENTUCKY TENNESSEE NORTH	 Send Email Assign Owner Add to Marketing List Delete Record Proximity Search Point of Interest
ARKANSAS MISSISSIPPI SOUTH ALABAMA GEORGIA LOUISIANA	Create New Activity Run On-Demand Workflow Add/view Note
ston FLORIDA Gulf of o America Miami	Reactivate Lead

<u>Note</u>: On reactivating lead, view of lead will get updated from closed leads to open leads.



Direction

• Once you add the records to 'Origin' & to 'Destination', you can check in to the **Routes** tab. From here by clicking on the **GO** button, you will get the route navigation with details.

\bigotimes	Plot	Plot External Data Routes Te	mplates POI	Q 🗰 🌣 💿 :	2V5Q+3X Englewood, KS, USA 💿 🥵
	OREGON	БУХЛИ. IDAH9 WYOMING	NISCONSIN MICHIGAN	NEW YORK BIZS Montgory	× nery IL 62051 United States
		Routes		×	igin Add to Destination
	San Francisco	🚘 rk 🕹 🖶	Options		Email
	Los An	O Hale, 79250, TX, United States	Shortest Entity Shortest time Shortest distance		jn Owner to Marketing List te Record
		Montgomery, 62051, IL, United States	Route Option Avoid highways		mity Search
		Add Location Your Location	Avoid tons Avoid ferries Records along the route		te New Activity
•					View Note
6		Share Route 🕞 Save Route 🌏 Navigate	Route View Saved Rou	utes > Go	
		Guadatajara Mexic		Cuba	
			and the second of the second sec	-	

• From the Route tab, you can also add multiple addresses and get directions.



• On the Map, you will get directions based on Driving including alternate directions if any. You can add multiple way points by clicking on 'Add Location'. You can add a maximum of 25-way points.

×

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Multiple Routes

• By clicking on any location *or* plotted records, click on **Add to Destination** to add multiple way points or you can add manually by clicking on the **Add Destination** from the 'Routes tab'. As you add all the required location and click on **GO** button, you will get the routes based on the location of multiple way points.

Routes	×
 Montgomery, 62051, IL, United States Fulton, 61542, IL, United States Jasper, 62448, IL, United States Callahan, 79510, TX, United States Garden, 69154, NE, United States Add Location 	Options Shortest Entity Shortest time Shortest distance Route Option Avoid highways Avoid tolls Avoid ferries Records along the route
Your Location	
Share Route 🕑 Save Route 🥩 Navigate Rou	ute View Saved Routes > Go



~ °	Argyle, Bartonville, 76226, TX, United States	For all the waypoints added in the route, each way point can be dragged to reorder
0	Southeast Fairbanks, AK, United States	After reordering the route it will
0	South Dakota, Laredo, TX 78041	immediately reflect on the map also.
•	Missouri City, TX	

- After selecting the location between **Origin** and **Destination**, it will list all possible routes and highlight the optimized route.
- You can also get directions based on means of transport like **Public Transit** and **Walking**.

Routes	×	
 Montgomery, 62051, IL, United States Fulton, 61542, IL, United States Add Location Your Location 	Options Shortest Entity Shortest time Shortest distance Route Option Avoid highways Avoid tolls Avoid ferries Records along the route	
Share Route 🕑 Save Route 🥩 Navigate Route	View Saved Routes > Go	
LA BAMA More rev LETERPRISE Eterprise Dutant Show Data	Athens Athens ID IS Union St, Montgomery, AL 36104, USA ID IS Union St, Montgomery, AL 36104, USA	

Share Route

Routes

🛋 r 🕹 🖶	Options
Coleman, 76873, TX, United States	Shortest Entity Shortest time Shortest distance Route Option
Galveston, 77590, TX, United States	 Avoid highways Avoid tolls
 Add Location Your Location 	 Avoid ferries Records along the route
Share Route 🕄 Save Route 😒 Navigate Rout	te View Saved Routes > Go

• As you click on the 'share' icon, the **Email** page in CRM side will open with the **link** of selected route. You need to insert the account/contact details to whom you want to send the email.

← □ ₿	Send 📓 Save & Close 🖒 Refresh 🔍 Check Access 🌘 Attach File 🔂 Insert Template 🗸 🖙 Insert	Signatu
Route link - Sa Email · Email ~ Email Related ·		
From	Mike Young (Offline) ×	۶
ō		۶ ر
Co		ç
cc		Ļ
Subject	Route link	
		6
a _ð ∨ 🐺 Seg	$ \begin{array}{c c c c c c c c c c c c c c c c c c c $	
Hi Please use the below li https://www.google.co For Smartphone/Tablet <u>From: Coleman, 76873</u> Thanks.	o access route in Desktop/Laptop: naps/dir/Coleman_76873, TX_United States/Galveston_77590_TX_United States/\$&mode=D ease use following links: _United States_To: Galveston_77590_TX_United States	

• You can see the preview of the email. As per the preview, the route details will be shown in the tabular format in the email.



×



Save Route

• Also, the selected route can be saved for future reference. To save a route, click on the Save 🖥 icon available on the top.

🖻 🛧 ֎ 🖶		Options		
 McLean, 61770, IL, United Stat Coleman, 76873, TX, United S Add Location Your Location 	es tates	Shortest Entity Shortest time Shorter Route Option Avoid highways Avoid tolls Avoid ferries Records along the route	est distance	
Share Route 🕒 Save Rou	ite 🕑 Navigate R	Route	View Saved Routes >	Go
	_			
utes	Save Route		×	
utes	Save Route	Enter name for route	×	
utes * & D	Save Route	Enter name for route # Afzal.Qureshi	×	
utes A A A B F McLean, 61770, IL, United St. U Coleman, 76873, TX, United	Save Route	Enter name for route # Afzal.Qureshi Low	×	
utes McLean, 61770, IL, United Str. L Coleman, 76873, TX, United Add Location Your Location	Save Route Route Name Vriority Route Start Date	Enter name for route # Afzal.Qureshi Low 18-03-2025	×	

- By clicking on Save 🗟 icon, it opens a dialog box where you need to provide a name to the route and user/team name to whom the route is being assigned.
- Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.
- By clicking on the **Save** button, the route will be saved and you can find these routes by clicking on the **View Saved Routes** button in the **Routes** section.



×

Routes



• You can preview the routes and delete any if it is not required. Routes can also be filtered based on Start date and End date by clicking on this icon



Saved Routes(2 selected)	ر ×
of the spin of the	\odot
And participants of the second	
· •	
Repliques	- 1
Real-State and a local	- 1
Rental Bulls ID	- 1
Responsible root of a	- 1
	- 1
Go	

- You can also apply various filters on route by clicking on "Options" dropdown. Various filters related to Distance are:
- Route Name
- Assignee to
- Priority
- Date

T Filter Routes	×
Select Filter Type	
Select Type	~
Select Type	
Route name	
Assginee to	
Priority	7
By date	and the
nd (AF



Along Route

• In the route option you can get Along the route feature.

\bigotimes	Plot	Plot External Data Routes	Templates POI	Q 🗰 🏟 💿 :	2V5Q+3X Englewood, KS, USA (8) g [#]
1	Edmonton	SASKATCHEWAN	HERFOLKOL MAD LABOA	Brian W Mills TX 70	Valker X
	Vancouver	Routes		×	
	Seatur WASHINGTON DEGON NETADA VUTA San Francisco CALIFORMO O Las Vega San Diego	Galveston, 77590, TX, United States	Options Shortest Entity Shortest time Shortest distance Route Option Avoid highways Avoid tolls Avoid ferries Records along the route 20		Igin Add to Destination Email In Owner to Marketing List te Record mity Search of Interest te New Activity Dn-Demand Workflow
		Share Route B Save Route Cuddilatar Cuddilatar Menico City Guatemala	vigate Route View Saved R Havana Cuba Puerto Rico	outes > Go	View Note

- Now, selecting **Along the route** search option displayed in the **Options** drop down section prompts the user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of the plotted route and displays pin in different colors than that which are within the route.



Multiple Saved Routes

You can plot multiple addresses at a time on the map. In order to do so, navigate to Routes and click on Saved Routes.



Dynamics 365	1appyField 365		Sande	SOX		ዶ ዩ + ዩ «	\$? @ (MY
≡ ŵ Home	Plot Plot	Plot External Data	Routes Tem	plates POI	۹ 🗰 🏟	2V5Q+3X Englewood, KS, USA	» «* ^۵
© Recent ∨ ☆ Pinned ∨ Azure Map ⊠ Map	Portan	Routes	MONTANA	MINNESOTA MINNESOTA Minnespolis Viccou	Neim	Montreal Ottava VERMONT VERMONT	New BRUNSWICK EL IE NOVA S
	Sar			Options Shortest Entity Shortest time O Shortest distance			
Scheduler 휪 Work Order Scheduler	Sai Fai	Enter Waypoint Enter Waypoint Your Location		Route Option Avoid highways Avoid tolls Avoid ferries Records along the route		14	
		Share Route (B) Save R	Route Navigate R	COARDILA HIERYO LSON Monterrey TAMAULIPAS	Routes > Co o Tampa FLOMPA Havana	i The Bahemas	Bermuda + -
Map 🗘	Google		NAYARI	SAN LUIS - POTOSI	ida da Caprin	Turks and Cuba Keyboard shortcuts C Map Data ©2021	5 Google, INEGI Terms

A slider will be displayed consisting of all the saved routes. Select the routes you want to view on the map.



Once you click on Go, all the selected routes will be displayed on the map.





The colors of the routes are mentioned in front of the respective routes in the Saved Routes slider.



SPF (Shortest Path First)

• If Route optimization is enabled from Configuration, then it will shorten the added routes with SPF algorithm. It can rearrange routes according to their distance from each other.



Before SPF



After SPF



<u>Note</u>: If you have enabled the SPF from the Default Configuration, only then SPF algorithm gets applied on the route.



Templates

• Templates feature helps you save map configurations so that you can come back to them later and tweak them according to requirement.



• If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

<u>Note</u>: If template is not public, only admin and the user who created that template will be able to view it.

		MT O
	🗟 Save Template	×
	Template	L J. U.S.
	Sales Data	
	Is Public	V2
8		Save
B		
1 <u>2</u>		
Google		

• Under the Templates section, logged in users can see all the templates created by them or the templates that are made public.



\bigotimes	Plot	Plot External Data	Routes	Templates	POI		Q 📋	\$	2V5Q+3X Englewood, KS, USA	۲	2
and the second second	No.			M8	on Bay		Labrador	Sea			4
		Templates						×			Ireland
		Show 10 v er	ntries								
		Map Templates			↓ A(ction					
		new temp1			0) m +					-
		new temp2			Ø) 🗊 +					Portuga
		Sales Data			0	> 亩 +			North Atlantic Ocean		K
		USA region temp	late		Ø) 🗊 +					Mo
Θ		Showing 1 to 4 of 4	entries			← Previous	1 Next →				Aug.
6				_						West Sah	iern ara
(H)					Cuba	Puerto Rico				M	auritania
1				Guatemala	Caribbean Se	20				-	+
Google				Sho	w Data	234			Keyboard shortcuts Map Data ©202	25 Google, IN	IEGI Terms

- The templates can be previewed by clicking on View icon (or You can delete as per your requirement.
- Through the **Plus icon**, you will be able to make that particular template, default.



POI-Point of Interest

- If you want to search specific locations like restaurant, coffee shops, hotels, airport, gas station, etc. near the plotted records, click on **Point of Interest** tab.
- You must insert the location; the autofill dropdown will appear. You will get the POI location bases on your location.

\bigotimes	Plot	Plot External Data	Routes Tem	plates POI	Q	*	© 2V5Q+3X Englewood, KS, USA	** **
and the second s	M	ar 1	2	\overline{k}		brador Sea		Ireland
		Point Of Interest				×		
		Location:						
		Q Please enter POI	location	🛞 🛛 Radius In Kilom	eter			n.
		V □ Ψ¶ Restaurants	Attractio	ns 🗌 🛧 Airports	Coffee shops			
		Gas stations	🗌 🏛 Bank	Others			North	Portug
B					Go		Atlantic Ocean	Ma
A								Western Sahara
				Cuba	Puerto Rico			
				Nicaragua Show Data				Mauritania + - vea

- Under the **POI** tab, select the location/place which you want to search.
- After selecting the POI Location, click on the **GO** button to plot the records of the POI on the map.



Data Grid

- **Data Grid** provides a listing of records which are plotted on the map. You can perform the different actions and manage the records from the Data Grid.
- To view the plotted records in the data grid, click on **Show Data**.





• By clicking on **Show Data**, a slider will open. You can view the plotted data as per selection of Entity. In the dropdown list, you will get only those entities which are selected to plot the record on map

ę	>	Plot	Plot External Data	Routes	Templates	POI		Q 🗰 1	¢	© 2V5Q+3X Englewood	KS, USA 🛞	
						de Data	Greaterd	tard Series Longi		Carlos		
Se	lect Entity View Accounts-	All Accounts	~	L				5	-	3 1 2		
Se	arch:		2	3				4	-	Copy Excel	De PDF	Print
	Account Name 🛛 🤟	Full Address		↓ o	wner	↓ Email	\downarrow	Address 1: Latitude	\downarrow	Address 1: Longitude 🛛 🗸	Actions	
	Account Name	Full Address			Owner	Email		Address 1: Latitude		Address 1: Longitude		
	Test M	380051, Gujarat,	, India,	М	ike Young	-		22.99488068		72.49767303	0	
	Alpine Ski House	Villa Ojo de Agu Estero, Argentin	a, Villa Ojo de Agua, Santiago a	Del M	ike Young	-		-29.49898		-63.68736	© 1	
0		Abmedahad 3	80051 Guiarat India	м	ike Young	_		22 99488068		72 49767303	0 1	

1. You can get the records of a specific entity by selecting the Entity View.

Select Entity View	Leads-All Leads	~		
	Accounts-All Accounts			
Search:	Contacts-All Contacts			
	Leads-All Leads			

- 2. You can search the records through here.
- 3. The records will display as per the selection of the 'Entity View'.



- 4. Copy the records, export the records in a specific file (Excel/PDF) and direct print the records.
- 5. Perform the different actions by selecting the data grid records:
- > Create Route and Route Activity > Add Record To Route > Change owner > Add Activity
- > Send Email
 > Manage Territory



• By clicking on **View** icon **(**), that record will get opened in CRM. By clicking on **Delete** icon **(**), it deletes the respective record from the CRM.

Note: Only users with System Administrator or Appjetty Calendar 365 admin can delete the records.

• You can perform actions by **selecting records** within the data grid as shown below:

Create Route and Route's Activity

You will be able to create routes and the respective activities by clicking on the first icon displayed on the Data Grid.

	COLUMBIA COLUMBIA	CHEWAN ONTARO Hide Data	OUÉBEC	R
Select Entity View Accounts-A	II Accounts 🗸		-> 🤞 👘	
0		Mike Young	-	© 🗊
	Survey States, A. Star Set.	Shyam Kamani	-	© 🛍
☑ Alpine Ski House	Argyle, Bartonville, 76226, TX, United States	Mike Young	-	© 🛍
☑ Alpine Sky	Will, 60481, IL, United States	Mike Young	-	© 🛍
		BCI - CRONUS IN (9e9b1dde-194e-ef11-bfe7- 6045bdacdbb5)	-	© 🛍
Showing 1 to 5 of 22 entries 2 ro	ws selected		← Previous 1	2 3 4 5 Ne

Once you select the specific accounts, navigate to the icon. A pop-up will be displayed where you need to fill in the details such as Route Name, User/Team, Start and End Date of the route, Priority, Time and Start Location. Click on the **Review + Create** button soon as you add all the necessary details.



Save Route		×
Route Name [*]	Marketing visit	
User	Mike Young	~
Priority	Low	~
Route Start Date [*]	24-10-2024	
Route End Date [*]	31-10-2024	
Start/End Time	9:00 AM O 5:00 PM	©
Select Activity	Meeting	~
Start Location*	Texas City, TX	
	Review + Cre	eate

You will then be navigated to the **Review Activity** page.

iration						
30 minutes			~	24-10-2024		
Set Duratio	n for	all	Marketing visi	t-10/24/2024		
Subject	\downarrow	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House		Alpine Ski House	30 Min 🗸	1:31 PM 💿	2:01 PM O	C Ō
					← Previous 1	Next →
					< Previous	Next -

Over here if you need to set the duration, enable **Set Duration for all** and the **Duration** field would then be accessible.



etty

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A Biztech Company

×

If there are multiple dates, you will be able to see the routes set for another day by selecting the date, through the drop down menu.

Review Act	ivit	ý							×
Duration									
30 minutes			~	24	-10-2024				~
Set Duration	n for	all	Marketing v	isit-10,	/24/2024	•			
Subject	\downarrow	Regarding	Duration		Start Date		End Date		Action
Appointment With Alpine Ski House		Alpine Ski House	30 Min	~	1:31 PM	O	2:01 PM	C	₡ 🖻
							← Previous	1	Next \rightarrow

When clicked upon this button, you will be redirected to the Google Map where the route will be displayed.



Review Activity





The icon beside, will redirect you to Mappyfield.



In the table, the **Duration** and **Start time** fields would be editable once you click on the **Edit icon**. The **End time** will automatically be updated as per the start time.

ition						
minutes			~	24-10-2024		
Set Duration	n for al	I	Marketing vis	it-10/24/2024		
Subject	\checkmark	Regarding	Duration	Start Date	End Date	Action
Appointment With Peter		Peter	30 Min	✓ 12:49 PM	© 1:19 PM ©	C 🖻
					← Previous 1	Next →

You can as well delete a particular location through the delete icon. A warning message will be displayed, and to proceed with the deletion click **Ok**.



Warning
Do you really want to delete this activity?
OK CANCEL

Now once all the configurations have been set, click on Create.

Review Acti	ivity				×
Duration					
30 minutes		~	24-10-2024		~
Set Duration	n for all	Marketing vis	it-10/24/2024		
Subject	↓ Regarding	Duration	Start Date	End Date	Action
Appointment With Peter	Peter	30 Min	12:49 PM C	1:19 PM	2 1
				← Previous	1 Next →
					Create

This created route and the activity will then be displayed in the **Saved Route**. Here as this is a **Master Route** you will not be able to view it. But for the child routes, along with Edit and Delete you will be able to View them.

Child Routes will be created as per the dates. If the admin sets the date from 18th July to 19th July, then the routes to be covered on 18th as per the distance and time will be listed as child route and the other child route would consist of the remaining route to be covered on 19th.





The edit icon will display the **Save Route** pop-up along with all the details you have entered. Below, there is a **Review Activity** button.

Save Route				×			
Route Name [*]	Marketing vis	Marketing visit					
User	Mike Young	~					
Priority	Low	~					
Route Start Date [*]	24-10-2024						
Route End Date [*]	31-10-2024						
Start/End Time	9:00 AM	©					
Select Activity	Meeting						
Start Location*	Start Location* Texas City, TX						
			Review + C	reate			

Clicking on this will direct you to the **Review Activity** page where you can **Update** any details if needed.



×

Review Activity

) minutes			~	25-10-2024				`
Set Duration	for	all	MArketing route	ə-10/25/2024				
Subject	\downarrow	Regarding	Duration	Start Date		End Date		Action
Appointment With biztech ac		biztech ac	30 Min 🗸 🗸	1:39 PM	O	2:09 PM	C	๔ ₪
						← Previous	1	Next \rightarrow

Add Record to Route

• Select the records and click on the "Add Record to Route" icon to add the records to the route.



- By clicking on that icon, the 'Routes' tab will appear with the selected records of the data grid.
- The locations will be added based on the record selection in Data Grid.

\bigotimes	Plot	Plot External Data	Routes	Templates	POI		Q 📋 🕴	\$	Atlanta, GA, USA	۲	2
	123	BRITISH COLUMBIA Edr	TA	MANITOBA			NEWFOUND	DLAND			
		Routes							×		
		🛋 🏌 📣 🗄		Op	tions						
		Saint Joseph, 49093, N Montgomery, 62051, IL Add Location Your Location	II, United States	Short Short Route An An A Re	est Entity Nortest time Short Option Vold highways Vold tolls Vold ferries Nords along the route	est distance			NG Atla O C	orth antic cean	
8		Share Route 🕲 Sa	ive Route 🕑 I	lavigate Route		View Saved Routes >		Go			
			Gu	adailajara • Mexico City • Gu	Havana C atemala	uba Caribbean Sea	Puerto Rico				+ -
Google				SHOW	~	Ca	acas		Keyboard shortcuts	Map Data ©2025 Google,	INFGI Terms

<u>Note</u>: If you proceed to perform any action from the data grid without selecting any record, you will get the Alert message that will prompt you to select the record.



Assign to User/Team:



You can directly assign the selected record to the User / Team.

As you click on that icon, the Assign to User or Team popup window will open to select the User/Team. After selecting User/Teams, click on Assign button.

Add Activity:



Send Email using Template



Send Email by selecting the records.

As you click on Email icon, the Send Email popup window will open. You need to select the Email Template.

By selecting an email template, you can send the Email on the email ids of the selected records.

By clicking on **Send Email** button the email page will be redirected.





Contextual Menu

'Right click' on the map to open the Context M

• It provides options as below:

> Create New Record	> Show Detail	> Create New Activity	> Add to Route	> Add to Locations
> Set as POI Location	> Set As Current Location	on.		

You (or logged in CRMusers) can also set default settings by hovering on Save Settings option:

> Default Location > Map zoom level > Origin > Destination.





- These settings directly get saved under MappyField 365 Configuration record for logged in users.
- By selecting Create New Record Option, open a dialog box to select record type.

Create New Record

• It can be Account, Contact or Lead. Upon selection of the option, you are redirected to a particular entity page of record creation.

+ Create New Record	×	+ Create New Record	×
What would you like to create?		What would you like to create?	
Account	~	Account	~
Account			
Agreement			
Contact			Create
Lead			Credito



Show Detail



By clicking on the **Show Detail** option from the Context Menu, you will get the popup window of the 'Public Details' from the right side as per the location.

• You will get the address details of the location. You can search the POI places and get the direction from the selected location.




Create New Activity



From the Context Menu, you can directly add a Task and an Appointment.

• You can add the activities that are enabled from the CRM backend. By clicking on the **Create New Activity**, "Create Activity" popup will appear.

	<u>∼</u> <u>+</u> +-	
🛨 Create Activity		/ ×
Select Activity	Meeting	~
	с	reate
	ARKAN	SAS

• By clicking on the **Create**, the popup will appear to select the required details to add the selected activity.



Quick Create: Mee	ting	\times
Owner	* 🐠 Mike Young ×	Q
Required Attendees		Q
Optional Attendees		Q
Subject	*	
Location		
Teams meeting	No No	
APPOINTMENT DETAILS		
Start Time	* 10/24/2024	:::
	3:00 PM	\sim
End Time	* 10/24/2024	:::
	3:30 PM	\sim
All Day Event		
Duration	30 minutes	\sim
	Save and Close 🗸 🗸	Cancel

• Similarly, you can perform the actions for other options from the Context Menu.

Calendar View

• You can also view the plotted activity records in the calendar view along with the Map view.



- You can view the calendar on a daily, weekly, and monthly basis.
- On clicking the activity from the calendar view, it will give the details of that record.



	Me	eeting: Appointment: Discussion reg	arding sales - Dynamics 365 - Go	ogle Chrome				-			© Crys	stal Peak	Road, G	arrison,	JT 8 🗵	ø	2
	°⊒ r	mappyfield365dev.crm8.dynan	nics.com/main.aspx?appid=1)52f5af-3cf4-404	a-bfec-2e14	ccd5ec49&f	orceUCI=1&	pagetype=	ent Q		• •						
		Dynamics 365 MappyFie	ld 365 SANE	BOX	م	۶ +	7 🕸	?	(2) (MY)								c ×
	=	← 🖆 🔚 Save 🗸	🗸 Mark Complete 🛛 🙎 Check	n 🖔 Refresh	🔍 Check A	Access :	1	🖒 Share 🗸	Ð	100		«	<)	>	»	Today	
Const and	ഹ പ്ര	Discussion regardir	ng sales - Saved		Normal	Open	Mike Yo	ung 🗸					Oct	ober 2	024		
-	\$	Meeting			Priority	Status	Owner			25	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	♥ .∔	Appointment Related	~							N.		30 04:30 PN 05:30 PN) 02:44 PN 03:21 PM	2	3	4	5
	9	Required		Q			V_			And -	6	+2 7	04:16 PN 8	9	10	11	12
ceŧ		Optional		Q			-			-2						11:40 AM 12:10 PM	
		Subject	* Discussion regarding sales							~~	13	14 10:01 AM	15 02:15 PM	16 02:05 PN	17 02:10 PM	18 10:30 AN	19
		Location								N.		+22	03:30 PM	03:13 PM	07:00 PN	10.30 AN	
_		Teams meeting	No No							'	20	21	22	23 02:00 PN	24	25 01:39 PM	26
		Regarding	Adam Smith ×	9										03:30 PN	+6		
										1	27	28	29	30	31		
		Attachments															
				:													

• After clicking you can also see the summary card which will have the details of that activity.

\bigotimes	Plot Plot Externa	l Data Routes	Templates POI	Q	🗎 🏟 💿 Atlanta, GA, US	A (S)) 🖌
« < > »	Today		March 2025			Day Week	⊠ × Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			26 10:33 AM Appointment With Adam Smi 01:18 PM Appointment With Azure	3 27			1
2		34	1 5	6	7		8
		04:38 PM Appointment With Alpine Sky		06:15 PM Appointment With AR Day Pro	06:57 PM Appointment With Alpine Sky	06:19 PM Appointment With I	Famr
9 08:30 AM Appointment With Lewis Hon	1	0	Activity Type: Meeting Regarding: Peter Start Time: 3/19/2025 9:00 PM Subject: Appointment With Peter	13	14		15
16	1	7 1.	09:00 PM Appointment With Peter	20	21		22
23	2	4 2E	5 26	3 27	28		29
30	\$	n			4		

• You can also view the calendar in full screen by clicking on the full-screen icon.



\bigotimes	Plot Plot External	Data Routes	Templates POI	Q	🗎 🏟 💿 Atlanta, GA, US	sa ®) 🖌
« < > »	Today		March 2025			Day Week	⊠ × Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			26 10:33 AM Appointment With Adam Smi 01:18 PM Appointment With Azure				1
2	3	4 04:38 PM Appointment With Alpine Sky	5	6 06:35 PM Appointment With AR Day Pro	7 08:57 PM Appointment With Alpine Sky	06:19 PM Appointment With F	8 Famr
9 08:30 AM Appointment With Lewis Hon	10	נו	Activity Type: Meeting Regarding: Peter Start Time: 3/19/2025 9:00 PM Subject: Appointment With Peter	13	14		15
16	17	L	09:00 PM Appointment With Peter	20	21		22
23	24	25	5 26	27	28		29
30	31						

• You can also reschedule the activity by dragging and dropping to a particular date.

\bigotimes	Plot Plot External	Data Routes	Templates POI	Q	🗎 🌣 💿 Atlanta, GA, US	a SA
« < > »	Today		March 2025			☑ X Day Week Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		25	26 Ot:18 PM Appointment With Azure	27 10:33 AM Appointment With Adam Sm		1
2	3		rning	6	7	8
		Appoint	tment With Adam Smith	Appointment with Ak Day Pro	06:57 PM Appointment with Alpine Sky	US:19 PM Appointment with Famr
9 08:30 AM Appointment With Lewis Hon	10	will be re Are you	escheduled to27-02-2025 10:33:00. sure you want to reschedule this ac	tivity	14	15
16	71		09:00 PM Appointment With Peter	20	21	22
23	24	25	5 26	27	28	29
30	31					

- After dragging and dropping the activity a warning message will popup on the screen. Click on OK to re-schedule the activity.
- Activity updated successfully message will appear on the screen.

Note: The time of the activity will be the same as it was before rescheduling.



\bigotimes	Plot	Plot External Data	Routes	Templates	POI	Q i	i ¢	Atlanta, GA, USA	\otimes	×.
«	< > » Today			 Activity upda 18 	ted successfully			Day	Week	C × 10nth
				т	uesday					
6am										
7am										
8am										
9am										
10am										
llam										
I2pm										
lpm										
2pm										
3pm										
4pm						 				
5pm										
6pm										
70m										
, pill										

• You can reschedule the time of the activity from the Daily view by dragging and dropping as per the requirement.

🛕 Warning
will be rescheduled to 15-07-2024 09:30:00. Are you sure you want to reschedule this activity?
OK CLOSE

• Activity updated successfully message will appear on the screen.



Ť		✓ Activity updated successfully	2 X
«	Image: Contract of the second seco	28 March, 2023	Day Week Month
		Tuesday	
6am			
7am			
8am			
9am			
10am			
11am			
12pm			
lpm			
2pm			
3pm			
4pm			
5pm	uouu PM - Quate Discussion		



Territory Management

Territory Management helps you to create territories through drawing, proximity, region and more. Also, you can plot the existing territories and copy or move them as required.

Click on the Territory Management section in the navigation panel and click on the Territory Management section present on the top of the page to create the territories.

Dynamics 365 MappyField 365	S	ANDBOX		ନ ହ + ଟ 🕸 (wy
≡ 💮 Home		Territory Management	Draft Territory	Ð
© Recent Syria Syria	Territory Management	••••••••••••••••••••••••••••••••••••••		VINGHAI China 型
Azure Map Jordan	Search Options:	Sel	ect Entity	Cluster
Territory Management Kuwait	By Region Region:	•.	Select Entity V	SICHUAM Chongqing
Google Map	City	~		Plot GUIZHOU
السنية السرية المعادي معادي المعادي المعادي معادي المعادي مع	City: • Enter city			D Kumming, 昆明市 YUNNAN
Scheduler Jeddah	Shape Fill	Preview		lyanmar & Manoi Hanoi
Red See See	Copacity 0.5			Haphong Harding Har
Djibout Gard A Djibout Bretan Egen	Border Width 3 Opacity 0.5			Harman Lever Party Corp Cambodia July Party Corp Cambodia July Cambodia
Map			Sri Lanka Laccadve Sea Colombo	Keyboard akortuuts Map Data 12025 Google, Mapa OlSrael Terms

There are various options to create the territories and those are :

By Region - This option helps the user to select territory according to different type of regions i.e. County, State, City and Postal Code.

You can add multiple values using comma.



Charlotte

Jacksonville

Orlando o Tampa FLORIDA

Havana

Miami

The Bahama

÷

Atlanta



ARKANSAS

Dallas

By Drawing - To select territories there are various shapes present like Polygon, Circle, Rectangle and Freetool. Different colors can be selected to draw around the region and the border color can also be selected.

TAMAULIPAS

Monterrev

SAN LUIS

Los Angeles

Ł

Û

2

ARIZON

Tucs

ONOR

Phoenix

NEW MEXICO

Ciudad Juárez





By Territory - In this option, various territories are present that have been created. You can select one or more territories according to your need.

Territory Managemen	t			×
Search Options:			Select Entity	⊖ Cluster
By Territory		~		All Accounts V
Territory: 3 selected		~	♥ ✓ Contacts ✓	All Contacts V
Q Search	⊗ ✓ Preview		 Add Legend By user/team 	
Illinios	0.5			Plot
te google				
Border Width	3			
Opacity	0.5			





By Proximity - In this section, there are two further options : Distance and Time.

- **Distance** : There are three sections that need to be filled. In the first section, a value between 1 to 99 should be entered. Further, you have to choose between Kilometers and Miles

Next, Location has to be entered, either manually or by plotting it on the map.



Such a view will be displayed after filling up all the details in the Distance section :





 For example : The location entered here is New York, United States and the values entered are 70, 85 and 99. So, the purple color shows the area that is covered from New York to the radius of 70 kilometers. Similarly, green and orange color covers an area from Texas to the radius of 85 and 99 kilometers respectively.

By File - To create territory through this option you have to select a file that states all the information required.



Territory Management

By File	~
Select File: 🚺	
Sample (5).csv	Upload
Sample CSV File	

According to the data grid will get appeared



Here, select the required region and click on plot.





The territory will be plotted according to the regions selected from the grid.



To the right, there are various entities mentioned from which the user has to select one. After selecting the Entity select the Entity view.

If you want to add more Entities and Entity Views then click on the + Add Legend button.



\bigotimes	Territory Management Draft Territory	
	onjand Beer Bings Bings Minnesota OREGON Bose WYOMING WISCONSIN WISCONSIN WICHIGAN TOTO WERVORT MAINE NEW YOR MORE WYOMING WISCONSIN WIS	N
	Territory Management CT RI	
	Search Options: Select Entity Cluster Select Singlo By File V V V	
	Select File: Sample (7).csv Upload Upload	
	Sample CSV File Image: State in the stat	Berr
	Plot	
b	COAHULA o Tampa FLORIDA NUEVO LEDN Miami	
	BAJA SUR SINALDA DURANGO MONTEREY Gulf o The Bahamas Mexico Havana Havana Havana H	+
Google	NAYARIT SERVICE BOTOST Guadalaja Show Dota Merida Cencon Cuba Calcos Islands	-

The territories can be assigned with various colors as per your convenience. Through the Shape Fill option you can select the color and the opacity can be set from the Opacity section.

Also the color, width and opacity of the outline of the territory can be selected through Shape Outline, Border Width and Opacity respectively. In the Preview section the color that has been selected is displayed.

			Select Entity				Clust
By Drawing		~	✓ Accounts	~	All Accounts	~	⊗
Drawing: 🛱 🔿 🗆 🖋 👁			₩ ~ Contacts	~	All Contacts	~	⊗
			🕂 Add Legend				
Shape Fill	P	review	🗹 By user/team				
Opacity	0.3		Users/Teams:				
			Mike Young				~
Shape Outline						Plot	
Shape Outline Border Width	2					Plot	

In the above portion, steps to create and plot the territories on the map have been mentioned.

The Location pin is used to mark the selected entities. You can change the pin color to bifurcate easily on the map.



There are four colors you can choose from : Red, Green, Pink and Blue. Three different shapes are also available. You can also add other pins by clicking on the add button; it is mentioned that only SVG files should be uploaded. A sample file is also given.

Territory Management			×
Search Options:		Select Entity	⊖ Cluster
By Drawing	~	♥ ✓ Accounts ✓	All Accounts V
Drawing: 珀 🔿 🗆 🖋 👁		V Contacts V	All Contacts V
Shape Fill Opacity	0.3	• • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •	~
Shape Outline			Plot
Border Width	2		
Opacity	0.7		

After filling up all the details, the Plot option is selected in order to plot the territory and view the required entities.



When a territory is plotted three icons are displayed below on the left side. \bigcirc - This icon is to select the particular territory. $\widehat{\mathbf{m}}$ - To delete any selected territory this button should be clicked. The third icon is used to refresh the entire page.





Create new territory

You can create new territory by clicking on the save button after selecting the required shape of the regions. After clicking you will get these options:

\odot	Territory Management Draft Territory
Andrease Sub-C (Amin	Hudson Bay Canada Latrador Sea
	+ Create new territory ×
	Add to parent territory
	Combine with existing territory
	Create new territory
	Please enter the name of territory
	Select Manager
	# Power Policy Service CM PROD
	OHIO PENN ON Washington New York
8	Save Save As Draft
	NOTH NOT
	San Diego Dallas wrististerri carella Ocea
	San Antonio º Houston
8	Hontertey Gulfor +
	Mexico Mami
Google Handulu	

Add to Parent Territory

Insert name for the present territory and select an existing territory for the parent territory.



+ Create new territory	×
Add to parent territory	
Please enter the name of territory	
Select Territory	
texas	~
O Combine with existing territory	
 Create new territory 	
	Save

Combine with existing territory

To combine the selected territories with the existing territories, this option is selected.

+ Create new territory	×
Add to parent territory	
Combine with existing territory	
texas	~
 Create new territory 	
	Save

Create New Territory

Insert the name you want to enter for the new territory as well as select the manager.



+ Create new ter	ritory	×
Add to parent terr	ritory	
O Combine with exi	sting territory	
Create new territo	bry	
Texas region		
Select Manager		
Steve Adams		

When all the required details are filled you can either save the territory or can save it as draft.

+ Create new terr	ritory	×
 Add to parent terr Combine with exis Create new territo 	itory sting territory ry	
Texas region		
Select Manager		
Steve Adams		~
	Save	Save As Draft

Draft Territories

While creating a territory you are provided with two options either to directly save or to save as a draft. Those territories that are saved as drafts are listed in this section. The list contains two columns :

Name - The name of the territories.

Action - There are three types of action you can perform:

- **View:** This action helps you to view the territory that has been saved as draft.
- Add: Clicking on this button, the draft territory will be added onto the Territory List.
- Delete: This deletes the territory permanently from the draft.



			-0
Draft Territory			×
Show 10 v entries		Search:	
Territories List		↓ Action	-10th-
drawing draft		© ¥ 1	
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Showing I to 6 of 6 entries		← Previous 1 Next	>
	5		



Check-Ins/Check-Outs

- You can use **Check-in** and **Check-out** features in all **activity** entities for Azure as well as Google map.
- Check-In feature enables admin/user to keep track of exact time spent behind an activity.
- With the help **of the check** in/check out button, you can tag geo-coordinates of the location and time while starting and completing an activity.
- To perform check in, click **on the check-in** icon available on the info card of an activity.



• Once checked in, it would show an action button to check out and show Check In/Check-Out History.



Mexanizer MICHIGAN Hamilton	Appointment With San × Peoria IL 61603 United States
Deroit OHIO Columbus Philac	Owner: Mike Young Add to Origin Add to Destination
	Send Email
KENTUCKY Nashvile TENNESSE	 Add to Marketing List Proximity Search
Charlotte NC	Point of Interest Delete Record
ALABAMA	Run On-Demand Workflow
- i Jacksonville	Create Follow-up Appointment
FLORIDA	=, Add/View Note
	Show Check In/Check Out History
La Habana	

- Users can **Check-In** or **Check-Out** from the map by clicking on the activity or from the detail view of activities by clicking on the title activity name.
- If the user is checking in late then the **Reason for late check in** popup will be visible where the users can enter their reasons for being late.

Pending CheckIn				
Reason	traffic			
Manager	Mike Young	~		
		Create		



Approve Check Ins

• Admins can approve these late check-ins by navigating to the **Check-Ins** - **Check-Out** section in the **Configuration And Dashboards** area.

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≡ 俞 Home	← 🖺 FC	ocused view 🖾 Show Chart 🝈 Delete 🔍	🗸 🗸 Approve 🛛 🗙 Reject	Non-Geocoded Records	🖒 Refresh	🤞 Visualize this view 🛛 🛱 Emi	ail a Link 🛛 🕆 🔊 Flow 🗸	🗐 Run Report \vee 🗄 😢 Share	2 ×
🕓 Recent 🗸	My Cheo	:k Ins* ∨					Edit columns	√ Edit filters]
🖈 Pinned 🗸	Na	me ~	Check In Date Time ~	c	heck In Location	~	Created By ~	Created On \downarrow \checkmark	
Configuration	Ap	pointment With test 6_account	3/18/2025 5:02 PM				Mike Young (Offline)	3/18/2025 5:01 PM	
Configuration	Da	tum meeting_account	12/24/2024 11:41 AM	n	nilwaukee USA		Mike Young (Offline)	12/24/2024 11:41 AM	
Entity Mappings	Ap	pointment with San_account	11/26/2024 9:27 AM	1	7, 100 Feet Road,	Prahlad Nagar, Ahmedabad 380	. Mike Young (Offline)	11/26/2024 9:27 AM	
Security Configuration	Ap	pointment with San_account	11/26/2024 9:26 AM	1	7, 100 Feet Road,	Prahlad Nagar, Ahmedabad 380	. Mike Young (Offline)	11/26/2024 9:26 AM	
Q. Check Ins - Check O	RR	account	10/24/2024 11:23 AM	1	7, 100 Feet Road,	Prahlad Nagar, Ahmedabad 380	. 🧑 Mike Young (Offline)	10/24/2024 11:23 AM	
Dashboard Configur	Biz	Test_account	10/23/2024 4:32 PM	1	7, 100 Feet Road,	Prahlad Nagar, Ahmedabad 380	. 🧑 Mike Young (Offline)	10/23/2024 4:33 PM	
Dashboards And Reports	Ap	pointment With Meeting Acc-1_account	10/23/2024 4:14 PM				Mike Young (Offline)	10/23/2024 4:14 PM	
분 Dashboard	Ap	pointment With Vedant Clinic_account	10/23/2024 4:13 PM				Mike Young (Offline)	10/23/2024 4:13 PM	
Appointment Check	E FF.	account	10/18/2024 10:35 AM	1	7, 100 Feet Road,	Prahlad Nagar, Ahmedabad 380	. Mike Young (Offline)	10/18/2024 10:34 AM	
	- tu	account	10/18/2024 10:31 AM				Mike Young (Offline)	10/18/2024 10:31 AM	
	🗌 pri	test4_account	10/17/2024 6:45 PM				Mike Young (Offline)	10/17/2024 6:45 PM	
	Ap	pointment With hjgu_account	10/17/2024 6:36 PM				Mike Young (Offline)	10/17/2024 6:36 PM	
	Ap	pointment With hjgu_account	10/17/2024 6:36 PM				Mike Young (Offline)	10/17/2024 6:36 PM	
	Ap	pointment With Jainish_account	10/15/2024 10:16 AM				Mike Young (Offline)	10/15/2024 10:16 AM	
CA Configuration An	Rows: 14								

• From the drop-down list select the **Pending Check-Ins** and you will get the list of all the pending check ins.

	Dynamics 365	MappyFie	eld 365	i		SAN[DBOX			م	Ø	+ `	7 🕸	? 4	ю (му
≡	Home	-	2	Focused view 🛱 Show Chart 📋 Del	ete 🗸 🗸 Approve 🛛 X Reje	ect 🖒 Refresh	💧 Visualize	this view 🛛 🖏 Email a Link 🛛 🗸	≫ Flow ∨ 📶 Run F	Report \vee 📲 Excel Templa	tes 🗸	< :		🖻 Share 🗸	Ð
٩	Recent 🗸	Р	Pendi	ng Check Ins \vee						😨 Edit columns 🛛 🍸 Edit f	ilters	₽ Filt	er by keyw	ord	
Ŕ	Pinned 🗸 🗸	1		Name ↑ ∽	Check In Date Time \curlyvee	Check In	Latitude ~	Check In Location ~	Check In Longitude ~	Check Out Date Time $^{\scriptscriptstyle \vee}$	c	heck Out	Location ~		
Co	nfiguration			Appointment With Vedant Clinic_account	10/23/2024 4:13 PM	23.0	0114810000		72.5150499000						
	Configuration Entity Mappings			Appointment With Meeting Ronny Anderson	10/23/2024 4:14 PM	23.0	0114810000		72.5150499000						
٥	Map Configuration			Appointment With Perthway managaer	10/17/2024 6:36 PM	23.0	227968000		72.5090304000						
Щţ	Security Configuration	1		Appointment With Smith	10/17/2024 6:36 PM	23.0	227968000		72.5090304000						
9,	Check Ins - Check O			Appointment With William	3/18/2025 5:02 PM										
60	Dashboard Configur			RR_account	10/24/2024 11:23 AM	23.0	0114843000	17, 100 Feet Road, Prahlad	72.5150403000						
Da	shboards And Reports			tt_account	10/18/2024 10:31 AM	23.0	0114969000		72.5150496000						
*	Dashboard														
0	Appointment Check														
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There are two ways to approve the check-ins, either you can do it individually or bulk.

• To approve individually click on the particular check in and roll down to **Check In Status**. Select Approve or reject as per your requirement and click on the **Refresh** button to save it.

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← 🗉 🗗 🗗	alete 🧟 Check Out 🖒 Refresh 🔍 Check Access 🙈 Assign 🌌 Flow 🗸 🖷 Word Templates 🗸 🗐 Run Report 🗸	🖻 Share 🗸									
Appointment With William - Saved Check Ins General Notes Related ~											
Check In Time	18/2025 5:02 PM										
Check In Location											
Check Out Time											
Check Out Location											
Check In User	Mike Young (Offline)										
Total Time Spent	Min										
Check In Latitude											
Check In Longitude	Select										
Manager	Pending										
Reason For Late Check-i	Approve Reject										
Check In Status	nding	~									
Approved Check In											

Note: Once the status is saved you can't change it.

Bulk Edit

• Select the records and click on the **Approve** button to approve the check-ins.

←	프 Focused view 🛱 Show Chart 볩 Delet	e 🛛 🗸 🗸 Approve	≺ Reject 🔉 Assign	🖻 Share	🖼 Email a Link 🛛 🗸	🔊 Flow 🗸	🔳 Run Report 🖂	Export to Excel	🔂 Share
Pend	ing Check Ins \vee							🔣 Edit columns 🛛 🍸 Edit filte	rs 🔎 Filter by keyword
	Name ↑ ∽	Check In Date Time ~	Check In	Latitude 🗸	Check In Location ~		Check In Longitude ~	Check Out Date Time ~	Check Out Location ~
	Appointment With Vedant Clinic account	10/23/2024 4:13 PM	23.0	0114810000			72.5150499000		
	Appointment With Meeting Ronny Anderson	10/23/2024 4:14 PM	23.0	0114810000			72.5150499000		
	Appointment With Perthway managaer	10/17/2024 6:36 PM	23.0	0227968000			72.5090304000		
	Appointment With Smith	10/17/2024 6:36 PM	23.0	0227968000			72.5090304000		
	Appointment With William	3/18/2025 5:02 PM							
	RR_account	10/24/2024 11:23 AM	23.0	0114843000	17, 100 Feet Road, Prahla	ad	72.5150403000		
	tt_account	10/18/2024 10:31 AM	23.0	0114969000			72.5150496000		



Approved Check Ins

• Once the Check-ins are approved it will be displayed in the **Approved Check-Ins** page.

ent 🗸	My Check Ins \sim				🖽 Edit columns 🛛	Zedit filters Pilter by keywo
inned 🗸 🗸	✓ Search views		Check In Date Time ~	Check In Location ~	Created By ~	Created On ~
guration	Active Check Ins		10/15/2024 10:16 AM		Mike Young (Offline)	10/15/2024 10:16 AM
Configuration	All Check Ins	ıt	10/23/2024 4:13 PM		Mike Young (Offline)	10/23/2024 4:13 PM
intity Mappings	All Check Outs	trop	10/23/2024 4:14 PM		Mike Young (Offline)	10/23/2024 4:14 PM
Security Configuration	Approved Check-Ins		10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
Check Ins - Check O	Approved Check-Outs		11/26/2024 9:26 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380	Mike Young (Offline)	11/26/2024 9:26 AM
Dashboard Configur	✓ My Check Ins	Default	11/26/2024 9:27 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380	Mike Young (Offline)	11/26/2024 9:27 AM
boards And Reports	My Check Outs		10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
Dashboard	My Today's Check Ins		3/18/2025 5:02 PM		Mike Young (Offline)	3/18/2025 5:01 PM
Appointment Check	My Today's Check Outs		10/23/2024 4:32 PM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380	Mike Young (Offline)	10/23/2024 4:33 PM
	Pending Check Ins		12/24/2024 11:41 AM	milwaukee USA	Mike Young (Offline)	12/24/2024 11:41 AM
	Pending Check Outs		10/18/2024 10:35 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380	Mike Young (Offline)	10/18/2024 10:34 AM
	Rejected Check-Ins		10/17/2024 6:45 PM		Mike Young (Offline)	10/17/2024 6:45 PM
	Manage and share views		10/24/2024 11:23 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380	Mike Young (Offline)	10/24/2024 11:23 AM
	tt_account		10/18/2024 10:31 AM		Mike Young (Offline)	10/18/2024 10:31 AM



Check Outs

• Once you have successfully checked in or approved check in, Check out button will be visible in the Info card of the activity.



• Click on the Check out button and Fill the following list of details in case of late check out:



- Reason for late checkout: Enter the reason for late checkout.
- **Title**: Enter the title for the reason.



- Enter a note: Enter the note as a reason for late checkout.
- File Name: Upload the file if you want to share any attachments.
- Click on the **Checkout** button.

Approve Check Out

• Admin can approve these late check-outs by navigating to **Check-Ins** - **Check-Outs** section. From the drop-down list select the **Pending Check-Outs** and you will get the list of all the pending check outs.

III Dynamics 365 Map	pyField 365		SANDBO>	<		م	9 + 7 © ? @
≡ 命 Home	← 😬 Focused view 🖾 Show Chart	🗊 Delete ~ ✓ Approve × Reject	🖒 Refresh 🛛 🍐 Visualiz	e this view 🛛 🖾 Email a Link 🛛 🗸	≫ Flow ∨ 📓 Run F	Report \vee 📲 Excel Templat	es \vee : 🖻 Share 🗸
🕒 Recent 🗸	Pending Check Outs \vee					🖽 Edit columns 🛛 🍸 Edit fil	ters 🔎 Filter by keyword
🖈 Pinned 🗸 🗸		Check In Date Time ~	Check In Latitude ~	Check In Location ~	Check In Longitude ~	Check Out Date Time ~	Check Out Location ~
Configuration	Active Check Ins	11/26/2024 9:37 AM	23.0227968000	9, Asavari Apartment Road,	72.5090304000	11/26/2024 9:43 AM	17, 100 Feet Road, Prahlad
Configuration	All Check Ins						
Entity Mappings	All Check Outs						
Map Configuration	Approved Check-Ins						
Security Configuration	Approved Check-Outs						
Check Ins - Check O	Inactive Check Ins						
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Dashboards And Reports	My Check Outs						
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Appointment Check	My Today's Check Outs						
	Pending Check Ins						
	✓ Pending Check Outs						
	Rejected Check-Ins						
	Rejected Check-Outs						
	Set as default view						
	Manage and share views						
CA Configuration An 🗘	Rows: 1						

• To approve individually click on the particular check out and roll down to **Check Out Status**. Select Approve or reject as per your requirement and click on the **Refresh** button to save it.

≡ ∧	← ば 📴 🗓 Delete 🖒 Refresh 🔍 Check Access 🔍 Assign 😰 Flow ∨ 🖷 Word Templates ∨ 🗐 Run Report ∨	🖻 Share 🗸										
份 Home												
🕒 Recent 🗸 🗸	San Frans Meeting_account - Saved											
🖈 Pinned 🗸 🗸	Check Ins											
Configuration	General Notes Related ~ Check Out Location \u03c6 17, 100 Feet Road. Prahlad Nagar. Ahmedabad 380051, Gujarat											
Configuration												
Entity Mappings												
Map Configuration	Check in User D C Mike Young (Offline)											
🖷 Security Configuration	Total Time Spent 🖄 6 Min											
Q. Check Ins - Check O	Check In Latitude 23.0227956000											
Dashboard Configur												
	Check in Longitude 72.5090304000											
Dashboards And Reports	Manager O Mike Young											
# Dashboard												
D Appointment Check	Reason For Late Check-in @ Requirement											
	Check in Status											
	Select											
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	Reason for Late Check- d Approve											
	out Reject											
	Check Out Status Pending	~										
	Approved Check-Out 🛆 No											
CA Configuration An 🗘												

Note: Once the status is saved you can't change it.



Bulk Edit

• Select the records and click on the **Approve** button to approve the check-outs.

Pending Check Outs > Check In Date Time > Check In Latitude > Check In Location > Check In Longitude > Check Out Date Time > Check Out Coation > San Frans Meeting.account 11/26/2024 9:37 AM 23.022796800 9, Asavari Apartment Road 72.5090304000 11/26/2024 9:43 AM 17, 100 Feet Road, Prahlad	\leftarrow	巴 Focused view 🖾 Show	Chart 🛍 Delete 🗸	✓ Approve	× Reject	옥, Assign	🖄 Share	🕼 Email a Link 🛛 🗸	\boxtimes Flow $$	🔟 Run Report 🖂	幅 Word Templates ~	K Export to Excel	🖻 Share 🗸
Image: Name 1 x Check In Date Time x Check In Latitude x Check In Location x Check In Longitude x Check Out Date Time x Check Out Location x San Frans Meeting.account 11/26/2024 9:37 AM 23.0227968000 9, Asavari Apartment Road, 72.5090304000 11/26/2024 9:43 AM 17, 100 Feet Road, Prahlad	Pen	ding Check Outs $artheta$									😨 Edit columns 🛛 🍸	Edit filters 🔎 Filter b	y keyword
San Frans Meeting. account 11/26/2024 9:37 AM 23.0227968000 9, Asavari Apartment Road 72.5090304000 11/26/2024 9:43 AM 17, 100 Feet Road, Prahlad	~	Name ↑ ∽	Chee	ck In Date Time Y		Check I	n Latitude 🗸	Check In Location ~		Check In Longitude ~	Check Out Date Time	 Check Out Loca 	ation ~
		San Frans Meeting account	unt 11/26/2024 9:37 AM			23.0227968000 9, Asavari Apartment Road,			oad,	72.5090304000	11/26/2024 9:43 AM	17, 100 Feet Ro	ad, Prahlad

Approved Check Outs

• Once the Check-outs are approved it will be displayed in the **Approved Check-outs** page.

≡ ∧	← 🗄 Focused view 🕅 Show Chart 🛍 Delete ∨	🗸 Approve 🛛 Reject 💍 Refresh 👍 Visualize this v	iew 🖾 Email a Link 🛛 🗸 🔀 Flow 🗸 🔟 Run	Report \vee 🖷 Excel Templates \vee 🗄 😢 Share 🗸
 Recent 	Approved Check-Outs ~			Edit columns Y Edit filters
🖈 Pinned 🗸 🗸	□ Name î ~	Approved Check Out \sim	Check Out Date Time ~	Check Out Location ~
Configuration	Julia client meeting	Yes	10/17/2024 5:52 PM	
Configuration	San Frans Meeting_account	Yes	11/26/2024 9:43 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 3
Entity Mappings				
Map Configuration				
Security Configuration				
Dashboard Configur				
••				
Dashboards And Reports				
# Dashboard				
Appointment Check				
CA Configuration An 🗘	Rows: 2			

Rejected Check Ins and Check Outs

• Any rejected Check-ins and check-outs will be displayed under **Rejected Check-Ins** and **Rejected Check-Outs** view respectively.

← 🗄 Focused view 🖾 Show Chart 📋	Delete 🛛 🗸 🖒 Refresh 🤞 Visualize this view 🛱 Email a Link 🖂 🖄 Flow 🗸 🗟 Run Report 🗸 🍘 Excel Templates 🗸 🛱 Export to Excel 🗠 🗄 😢 Share
Rejected Check-Ins \vee	III] Edit columns ▼ Edit filters
Active Check Ins	
All Check Ins	
All Check Outs	
Approved Check-Ins	
Approved Check-Outs	
Inactive Check Ins	
My Check Ins Default	
My Check Outs	
My Today's Check Ins	
My Today's Check Outs	
Pending Check Ins	
Pending Check Outs	
✓ Rejected Check-Ins	
Rejected Check-Outs	
Set as default view	
Manage and share views	
Rows: 1	

• The users won't be able to check in or check out if the admin has rejected their request.



Check-in and Check-out Reports

The Check-in and Check-out report section contains the history of checkin and checkout of the agents. This section is present on the navigation panel.

III Dynamics 365	MappyField 365			S	ANDBOX		م	Q + V	″ ⊗ ?	Ð
 ➡ ➡ ↔ Home ⊕ Recent ✓ ✓ ✓ ✓ Configuration 	From: 01-01-2024	a	To: 18-03-2025	m	Jsers : Mike Young	CT	Se	earch:		
Configuration		User Name		-	Checkin-Checkout Count		Total Duration			¢
Entity Mappings	•	Mike Young			6		54.53 Hr			
Map Configuration							Searc	h:		
Check Ins - Check O	Customer	Name 🔺	Appointment Subject	Checkin	Time 🕴	CheckOut Time 🔶 N	leeting Duration 🔶	Action		
Dashboard Configur	biztech ac		PArth Test	10/23/20	24 2:31 PM	10/23/2024 2:35 PM 4	.00 Min	0		
	Meeting Ac	.c-1	Client Meeting	10/24/20	24 11:25 AM	10/24/2024 11:28 AM 3	.00 Min	0		
Dashboards And Reports	San Frans		San Frans Meeting	11/26/20:	24 9:37 AM	11/26/2024 9:43 AM 6.0	.00 Min	0		
ान Dashboard	Test M		fdsf	10/15/20	24 11:32 AM	10/17/2024 5:52 PM 5	4.33 Hr	0		
	Test M		п	10/18/20	24 10:14 AM	10/18/2024 10:14 AM 0	.00 Min	0		
	Showing 1 to 1 of	5 of 6 entries 1 entries						1	2 Next	
CA Configuration An 🗘										

You have to select From & To date. Through the Users section, you can either Select All or can select any particular user, you want to view the details of.

From:		То:			Users :				
01-03-2023	#	20-03-2023	#		Prakash Bambhania	-	СТ		
					Search Q 🖲		Search:	Search:	
				-	Select all				
^	User Name		¢ CI	heck	🔽 🛛 Prakash Bambhan	a		\$	Total Duration 🔶
					🔲 John William				
Showing 0 to 0 of 0 entr	ies								

Now, click on the Filter icon to view the details and to reset the details click on the Reset icon. A search bar is also present on the right side of the page in order to search for the required user among the list.

From: 01-01-2023	Ê	To: 31-01-2023	Ê	Users : Prakash Bambhania	CT		Search:	
	User Name		÷	Checkin-Checkout Count		\$ То	tal Duration	÷
0	Prakash Bambhania			4		2.2	2666666666666666666 Hr	
Showing 1 to 1 o	f 1 entries							1



A list of the agents including their checkin-checkout count and total duration is displayed after clicking

on the filter icon. By clicking on \bigcirc which is present on the left side of the list you can view the activity details.

From:		To:
01-01-2023	#	31
	User Name	
0	Prakash Bambhania	
Showing 1 to 1 of 1	entries	

The report displayed after clicking on \bigoplus , consists of Customer Name, Appointment Subject, Check-In Time, Check-out Time, Meeting Duration and Action.

Customer Name	Appointment Subject	Checkin Time	CheckOut Time	Meeting Duration \Leftrightarrow	Action
Adam	Adam's Meeting	1/30/2023 2:23 PM	1/30/2023 2:58 PM	35 Min	0
Andrion	Quote Discussion	1/30/2023 2:24 PM	1/30/2023 2:59 PM	35 Min	0
Naive	Appntimp	1/30/2023 2:23 PM	1/30/2023 2:59 PM	36 Min	0
Titan	Titan's Meeting for discussion	1/30/2023 2:53 PM	1/30/2023 3:25 PM	32 Min	0
Showing 1 to 4 of 4 entries					0

You can also view the detailed information of each record in the CRM page by clicking on the View icon in the Action Column.



Search:		
Å	Action	
	0	
	0	
	0	
	0	

	ビ + Add Alert [🗓 Delete 🕐 Refresh 🔍 Check Access 💫 Assign 🛛 Flow 🗸 幅 Word Templates 🗸 🗐 Run Report 🗸	🖻 Share 🗸
A Ch G	dam's Meeting_acco eck Ins eneral Notes Related	ount - Saved	
	≙ Name ×	Adam's Meeting_account	
	≜ Owner *	Prakash Bambhania (Available)	
	🗄 Check In Time	1/30/2023 🗎 2:23 PM	
	🗄 Check In Location	5 Stadium Road, Prahlad Nagar, Ahmedabad, GJ-380015, India	
	🖞 Check Out Time	1/30/2023 🛅 2:58 PM	
	A Check Out Location	Gulzar Manzil, Khanpur, Ahmedabad, GJ-380001, India	
	🗄 Check In User	Prakash Bambhania (Available)	
	🛆 Total Time Spent	35 Min	
	Check In Latitude	23.0113020000	
	Check In Longitude	72.515500000	
	🖰 Manager	Prakash Bambhania	



Work order schedular

The **Custom Scheduled Board** is a tailored solution designed to help users effectively schedule their bookings based on unscheduled work orders. This tool provides an intuitive interface for organizing and managing work orders efficiently.

Dynamics 365	MappyField 365									SA	ND	30X	(Q	8 +	- 7	۲	? 4	ъ (
≡	Resource Selection	n : All s	selected ((11)	-																			٠		S	
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🖈 Pinned 🗸 🗸	Resources							Su	ın 3/16											Mon 3	8/17						
Azure Map	Riyaan	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3am	4am	5am	6am	7
Map	Kairon																										
🐥 Territory Management	Abc test																										
Coople Man	Test Crew																										
Google Map	Shyam Kamani																										
♥ Map	Mike Young																										
Territory Management	John William																										
Scheduler	Jainish																										
B Work Order Scheduler	Prakash Bambhania																										
-	Adil Shaikh																										
	James France																										
	Unscheduled Wo	rk Order	rs										· ·										Sear	ch Worko	rders		
	Workorder Name Service Account Owner Workorder Status Address														11												
	00003 surendranagar Mike Young Active Surendranagar, 353001, India																										
	00004			test	3					Mike	Young		Active				Vadodara, 391243, India										
	00005			test	4					Mike	Young		Active					Chhota U	daipur, 391	125, India							
Map 🗘	Unscheduled work or	der count	: 9																								

Note:

To use this solution, users must have the following prerequisites:

- Field Service License
- Mappyfield 365 Installation with an active license

Mike Young

Active

• Mappyfield 365 Configuration with Azure Maps

Supported Devices

The Custom Scheduled Board is compatible with **desktop and laptop screens.**

Resource Selection	: All s	elected (*	10)	•															\$			3
< >	today								Oct	20 – 26,	2024								day	week	mont	ħ
Resources											Sun 1)/20							Mon 10	21		
Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1am	2am	3a
Riyaan																						
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
										~												
Unscheduled Wor	k Order	Search Workorders																				
Workorder Name	Ser	ervice Account Owner Workorder Status Address																				
00001	alas	ka			Mike Young	g A	ctive		So	utheast Fai	rbanks, Uni	ted States										
00002	bizte	ech ac			Mike Young) A	ctive		C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india													

Surendranagar, 363001, India

Unscheduled work order count : 12

surendranagar

00003



This is the interface of our **Custom Scheduled Board**, designed to initially load and display the following key elements:

- Unscheduled Work Orders: All pending work orders that are yet to be scheduled.
- Scheduled Work Orders: Work orders that have already been assigned specific dates, times, and resources.
- **Bookable Resource Bookings:** Information on available resources, including assigned bookings and availability.
- Calendar View: An intuitive calendar interface for easy scheduling and time management.
- Azure Map Integration: Provides geographical context to help visualize booking locations.

Resource Management

Resource Selectio	n: All s	selected (10)	•									
< >	today			0	ct 20 – 2	6, 2024			c	day v	veek	month	Nawäbshäh Shergarh Jodf Rohat , Pč Unscheduled WorkOrder
Deserves								Sun	10/20				Hyderabad Scheduled WorkOrder
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Karachi Mithi Rāniwāra Jhalawar
Riyaan					C								Nakhtarana OUMAAT Ghatol Khachrod Bhonal
Kairon													
Abc test													Rājkot
Test Crew													Porbandar Bhāvnagar Khandwa Atner
Shyam Kamani													Veraval Rural Motāla
Mike Young													Nashik Chāndvad
lalalah													Carbonani Salari Sa
										~			
Unscheduled Wo	ork Order	s											Search Workorders
Workorder Name	Sei	vice Acc	ount		Owner	١	Norkorder	Status	Ac	ddress			
00002	bizt	ech ac			Mike You	ing /	Active		C/I	801 Dev Au	Irum Com	mercial Ana	indnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike You	ing A	Active		Su	irendranag	ar, 363001	, India	
00004	test	3			Mike You	ing 4	Active		Va	idodara, 39	1243, Indi	a	

Unscheduled work order count : 11

Resource Selection Field is a multi-select option that lists all available users. Users can choose one or multiple resources from this list. Once selected, these resources are displayed in the Calendar Resource Section for easy scheduling and management.

Resource Selection	: All selecte	d (10)	•									¢ N 2
< >	today		0	ct 20 – 26	, 2024			c	lay v	veek	month	Nawäbshäh Shergarh Jodt Unscheduled WorkOrder
							Sur	n 10/20				Hyderābād Scheduled WorkOrder
Resources	4am 5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Karachi Mithi Rāniwāra Silas Jhalawar
Riyaan				٥								Reodhari Palianpur Mandsaur, Chachora, Ghatol Khachrod Bhonāl
Kairon												Dhar Indore
Abc test												Rājkot
Test Crew												Porbandar Bhāvnagar Khandwa Atner
Shyam Kamani												Veraval Surat, Dhule- Veraval Rural Motāla
Mike Young												Nashik Chândvad
tatatata												C2024 OSM ©2024 TomTom ©2024 Navim
									~			
Unscheduled Wor	k Orders											Search Workorders
Workorder Name	Service A	ccount		Owner	١	Norkorde	Status	Ad	dress			
00002	biztech ac			Mike Young	g /	Active		C/8	301 Dev Au	Irum Comn	ercial Ana	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendrana	gar		Mike Young	g /	Active		Su	rendranag	ar, 363001,	India	
00004	test 3			Mike Young	g 4	Active		Va	dodara, 39	1243, India		

Unscheduled work order count : 11

Upon clicking the button, a Filter Form opens, displaying various fields that can dynamically bind based on



configuration settings.

Resource Selection	: All s	elected (*	10)	•									¢ N 2
< >	today			0	ct 20 – 26	i, 2024	4		d	ay v	veek	month	Nawābshāh Shergarh Jodt Unscheduled WorkOrder
Deserves								Sun	10/20				Hyderabad Scheduled WorkOrder
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Raniwara Jhalawar
Riyaan					C								Reothar palanpur Mandsaur, Chachora, Ghatol Khächrod Phonöl
Kairon													
Abc test													Rājkot
Test Crew													Porbandar Dhari Suret 33 Dhula
Shyam Kamani													Veraval Rural Motăla
Mike Young													Nashik Parbhani Mahārāshīra
lalalah													62024 OSM 62024 TomTom 62024 Navin
										`			
Unscheduled Worl	k Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner		Workorde	Status	Ac	Idress			
00002	bizte	ech ac			Mike Your	g	Active		C/8	301 Dev Au	Irum Comr	nercial Anar	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	ndranagar			Mike Youn	g	Active		Su	rendranaga	ar, 363001	India	
00004	test	3			Mike Youn	g	Active		Va	dodara, 39	1243, India		

Unscheduled work order count : 11

Users can fill in values according to each field's type, enabling targeted filtering. After filling in the desired criteria, clicking the Apply Button filters the resources displayed in the calendar resource section.

Resource Selection	: All selected (10) -								\$		ø
$\langle \rangle$			Oct 20 – 26, 20	24	day week month		Nawābshāh	Shergarh		Unsche	duled Wo	orkOrder
Resources	4am 5am		8am 9	Sun 10/2	20 20	Karach	i Mithi		iwāra	Schedu	Ibalay	Var S
Test Crew				Resource Filter At	ttribute List	×	m	Reodhar Pa		Manda		hāchora Leteri
Shyam Kamani				Crew Strategy:			lāna G	UJARAT		Khāc	hrod	Bhopāl
Mike Young				Select Option		~	Rājkot	J.P.M	65			
Jainish				oblock option			andar	Bhāvnagar	Y		Khand	Atner
Prakash Bambhania				Owner:			·······································	Dhāri	Surat 72	Dhule		
Adil Shaikh				Owner Value		۹	- - -				Motāla	
James France				Status:				N	ashik /	Parbl ©2024 OSM	ani MAH	ARASHTRA
				Select State		~						
Unscheduled Wor	k Orders				_							
Workorder Name	Service Acc	ount	Owner			Apply						
00002	biztech ac		Mike Young	Active	C/801 Dev Aurum Commercial Anar	ndnagar Cross Road	d, Prahalad Nagar, S	atellite, ahmedaba	id, 380015, inc	dia		
00003	surendranagar		Mike Young	Active	Surendranagar, 363001, India							
00004	test 3		Mike Young	Active	Vadodara, 391243, India							
Unscheduled work ord	er count : 11											

Resource Selection	: All selected (10)	-				\$ N S
< >		Oct 20 – 26, 20	24	day week month	Nawābshāh Shergarh	Jodr ohat Pe Unscheduled WorkOrder
Resources		Zam Sam Qa	Sun 10/20	Kara	Hyderabad achi Mithi R	aniwara
Test Crew			🍫 Resource Filter At	tribute List	× Reodhar	Palänpur Mandsaur Chachora
Shyam Kamani			Crew Strategy:		rāna GUJARĀT	Khāchrod Bhopāl
Mike Young					Pāikot	Dhar Indore B
Jainish			Crew Leader Managemer	nt 🔨	bandar Bhāvnagar	Khandwa
Prakash Bambhania			Owner:		Dhāri	Surat ?? Dhule
Adil Shaikh			# Afzal.Qureshi Owr	ner Value C	Veraval	Rural Motāla Chāndvad R
James France			Status:			Parbhani MAHARASHTRA @2024 0SM @2024 TomTom @2024 Navinfo
			Active		·]	
Unscheduled Wor	k Orders					
Workorder Name	Service Account	Owner		Арріу		
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross	Road, Prahalad Nagar, Satellite, ahmeda	abad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India		
00004	test 3	Mike Young	Active	Vadodara, 391243, India		
Unscheduled work ord	er count : 11					



Resource Selection	: Abc	test, Adil	Shaikh	-									🗢 🔳 S						
< >	today			0	ct 20 – 20	6, 202 4	ı		d	ay v	veek	month	Nawäbshäh Shergarh Jodt Unscheduled WorkOrder						
Resources	Sun 10/2												Karachi						
Readdrees	4am 5am 6am 7am 8am 9am 10am 11am 12pm 1pm 2pm 3pm Thatta Mithi Ramwa										Thatta Mithi Raniwara Jhalawar								
Abc test													Mandsaur, Chachora						
Adil Shaikh													Nakhtarana Räjkot Porbandar Dhan Veraval Bhävnagar Veraval Nashik Chandwa Rate Porbandar Bhävnagar Veraval Nashik Chandwa Rate Porbandar Rate Porbandar Veraval Nashik Chandwa Rate Porbandar Veraval Nashik Chandwa Rate Porbandar Nashik Chandwa Rate Porbandar Nashik Nashik Porbandar Nashika Nashika						
										· ·									
Unscheduled Wor	k Order	rs											Search Workorders						
Workorder Name	Sei	rvice Acc	ount		Owner		Workorde	Status	Ac	idress									
00002	bizt	ech ac			Mike You	ng	Active		C/8	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india									
00003	sure	endranagar			Mike You	ng	Active		Su	Surendranagar, 363001, India									
00004	test	3			Mike You	ng	Active		Vadodara, 391243, India										
Unscheduled work ord	er count	: 11																	

To manage filter fields efficiently, users can access Configuration Settings from the Settings menu.

Within Configuration Settings, users have control over key customization options:

- **Resource (Bookable Resource) Filter Field:** Configure the specific fields that appear when filtering resources, making it easier to refine search criteria.
- Calendar Event (Bookable Resource Bookings) Hover Field: Select and display relevant details when hovering over events in the calendar, giving users quick insights into bookings.
- Map Pushpin (Scheduled/Unscheduled Work Order) Hover Field: Customize the details shown when hovering over map pushpins, enhancing work order visibility on Azure Maps.

These settings enable precise control over what information is displayed, streamlining scheduling and navigation across the Custom Scheduled Board.



This setup allows for a tailored interface that aligns with unique user and business needs.

Unscheduled work order count : 11

To apply all configuration settings, users need to click the **Save Button**. This action saves the settings as a one-time configuration, which users can update anytime as needed.



Resource Selection	: Abc test, Adil	Shaikh	- 7											
< >			Oct 20 – 2	5, 202 4	day week month Nawäbshäh Shergarh Jodt Unscheduled WorkOrder									
Resources	4am 5am	6am 7	am 8am	9 <mark>2m 102m 110m</mark>	sun 10/20 Karachi Mithi Rānivāra Jhalawar									
Abc test Adil Shaikh				🍫 Configuratio	د Configuration Settings × معلم المعلم ال									
				Resource Filter Att	tribute (Upto 5) : Brikot Britat Brikot Brik									
				3 selected	handar Bhävnagar Khandwa Amer									
				2 selected	ttribute (Upto 5) : Veraval Veraval Motala									
				Map Hover Attribu	te (Upto 5) :									
				Owner										
Unscheduled Wor	k Orders				Search Workorders									
Workorder Name	Service Acco	ount	Owner											
00002	biztech ac		Mike You	ng Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india									
00003	surendranagar		Mike You	ng Active	Active Surendranagar, 363001, India									
00004	test 3		Mike You	ng Active	Active Vadodara, 391243, India									
Unscheduled work ord	er count : 11				C									

saved, the custom settings will be applied across the **Custom Scheduled Board**, ensuring that all selected filters, calendar hover fields, and map pushpin hover fields are displayed according to user preferences.

To toggle the visibility of the map according to user preferences, click the **Show/Hide Map Button**.

Within the map, there are two toggle switches:

- Scheduled Work Orders: Toggle this switch to display or hide scheduled work orders on the map.
- Unscheduled Work Orders: Toggle this switch to show or hide unscheduled work orders as desired.

These toggle switches allow users to control which work orders are visible on the map, ensuring a customized and efficient view.



Resource Selection	Abc	test, Adil	Shaikh	-									* 🔳 2
< >	today			0	ct 20 – 2	26, 2024		Sun	d	ay v	reek	month	Nawabshah Shergarh Jod Unscheduled WorkOrder Hyderäbäd Rohat P
Resources Abc test Adil Shaikh	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Karachi Mithi Raniwara Jhalawar Thatta Reodhar palanpur Nakhtarana Guuarat Ghatol Khachrod Bhopal
													Rājkot Porbandar Bhāvnagar Khandwa Atner Dhāri Surat Dhule Veraval Nashik Chāndvad R Parbhani Markakserras Surat Dhule

Unscheduled Work Orders

Unscheduled Work C	Search Workorders										
Workorder Name	Service Account	Owner	Workorder Status	Address							
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india							
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India							
00004	test 3	Mike Young	Active	Vadodara, 391243, India							
Incohodulad werk order count - 11											

Resource Selection	: All s	elected (10)	•															*		Ŕ	
< >	today								Oct	20 – 26	2024								day	week	mont	n
Resources								Sur	10/20			Mo									Mon 10	21
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1a
Riyaan																						
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
										~												
Unscheduled Worl	k Order	S								Search Workorders												
Workorder Name	Ser	vice Acc	ount		Owner		Workorde	r Status	Ac	Address												
00002	biztech ac Mike Young Active								C/8	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india												
00003	sure	ndranagar			Mike You	ng	Active		Su	Surendranagar, 363001, India												
00004	test 3 Mike Young Active							Va	dodara, 39	1243, India												

Unscheduled work order count : 11

Resource Selection	: Abc	test, Adil	Shaikh	÷									* N <i>2</i>						
< >	today Oct 20 – 26, 2024										reek	month	Nawäbshäh Shergarh Joe Unscheduled WorkOrder						
Resources	Sun 1								10/20				Karachi						
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Thatta Mithi Rendhar Jhalawar						
Abc test Adil Shalkh													Alambur Mandsaur Leter Nakhtarana Räjkot Dhar Indore Bhopal Porbandar Bhävnagar Veraval Surat, ²² Dhale Khandwa Atner Dhar Surat, ²³ Dhale Rural Motala Nashik Chandwa Bhankasatraa Coa de gega tambar 2024 tambar						
										~									
Unscheduled Wor	rk Order	rs											Search Workorders						
Workorder Name	Sei	rvice Acc	ount		Owner		Workorde	r Status	Ac	dress									
00002	bizt	ech ac			Mike Your	ng	Active		C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india										
00003	sure	endranagar			Mike Your	ng	Active		Su	rendranaga	ar, 363001,	India							
00004	test	3			Mike Your	ng	Active		Va	Vadodara, 391243, India									
Unscheduled work ord	ler count	- 11																	

These toggles help users display specific work orders on the map:

• Scheduled Work Orders: Displayed with green pushpins, as shown in the image below. This allows users to easily identify and focus on scheduled tasks.


Resource Selection	: All s	elected (10)	-									¢ N 8
< >	today			0	ct 20 – 26,	2024			d	ay w	eek	month	ARYANAN BUNGLOWS Unscheduled WorkOrder
Resources								Sun	10/20				Gabhavi Gabhavi
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	RAM DEV NAGAR
Test Crew													I PÄRK
Shyam Kamani													A homodohod
Mike Young													JAIN NAGAR ATTITTECIADACI
Jainish													147 ISHI7 SARVODAY NA
Prakash Bambhania													SAKET SANKLIT NAGAR , PIRANA
Adil Shaikh													VISHALNAGAR
James France													CHALODA PARSIDUNG2
									-	~			
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner	1	Workorder	Status	Ac	Idress			
00002	bizt	ech ac			Mike Young	,	Active		C/8	01 Dev Au	rum Comm	ercial Anar	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike Young	1	Active		Su	rendranaga	ar, 363001,	India	
00004	test	3			Mike Young	1	Active		Va	dodara, 39	1243, India		
Unscheduled work ord	er count	: 10											

• **Unscheduled Work Orders**: Displayed with red pushpins, as shown in the image below. This helps users spot tasks that still need scheduling.

Resource Selection	: All s	elected (10)	•									¢ 💷
< >	today			0	ct 20 – 2	6, 2024			d	ay v	reek	month	BUIGALOWS NILMANI
Resources						Sun	10/20						GADHAVI GADHAVI
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	
fest Crew													PARK SOCIETY
Shyam Kamani													Ahmedahad
/like Young													147
Jainish													SHI7
Prakash Bambhania													SAKET SANKLIT NAGAR PIRANA
Adil Shaikh													
lames France													CHALODA
									-	~			
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Se	vice Acc	ount		Owner	1	Workorder	Status	Ad	dress			
00002	bizt	ech ac			Mike You	ng /	Active		C/8	01 Dev Au	rum Comn	ercial Ana	andnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	endranagar			Mike You	ng A	Active		Su	endranaga	ar, 363001,	India	
00004	test	3			Mike You	ng /	Active		Vac	lodara, 39	1243, India		

Unscheduled work order count : 10

These color-coded pushpins provide a clear visual distinction between scheduled and unscheduled work orders for streamlined planning.

Users can apply a **Proximity Filter** by clicking on a pin to perform a radius-based search, ranging from **1 to 99 km** for both scheduled and unscheduled work order pins. This feature allows users to easily identify nearby work orders based on their selected pin:



Resource Selection	: All s	elected (1	10)	•										
< >	today			0	ct 20 – 26, 2	2024			d	ay w	eek	month	Billingal.ows	r
Pasourcas						Sun 10/2	20						Proximity For :- 00007	ŝ
Resources	4am	5am	6am	7am	8am 9	am 1	Dam 1	1am	12pm	1pm	2pm	3pm	Enter Km (1-99)	ES
Test Crew													Proximity Search	
Shyam Kamani													Abmodahad	GAI
Mike Young													JAIN NAGARY (AITHITECIADAC)	2
Jainish													SARVODAY	NAC
Prakash Bambhania													SAKET SANKLIT NAGAR PIRANA	
Adil Shaikh													VIENALMAAD	1
James France													CHALODA	INGA
										~			CZU24 Iom	Iom
Unscheduled Wor	k Order	s											Search Workorders	
Workorder Name	Ser	vice Acc	ount		Owner	Work	order St	atus	Ad	dress				1
00002	bizte	ch ac			Mike Young	Active			C/8	01 Dev Au	rum Comm	ercial Anar	nandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india	1
00003	sure	ndranagar			Mike Young	Active			Su	rendranaga	r, 363001,	India		
00004	test	3			Mike Young	Active			Vac	dodara, 391	243, India			

Unscheduled work order count : 10

To perform a proximity search, enter a value in the textbox and click on the Proximity Search Button.

Scheduled Work Order Pin: When selected in the proximity filter, the search displays all unscheduled work orders within the specified radius. The **Unscheduled Work Order grid** is then updated to reflect only these nearby, unscheduled tasks.

Resource Selection	n: All s	selected (10)	•									† NU <i>3</i>				
< >	today			0	ct 20 – 2	6, 2024			d	ay w	eek	nonth	Mahesāna Unscheduled WorkOrder				
Resources						Sun	10/20						Scheduled WorkOrder				
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm					
Test Crew													Gandhinagar Taluka				
Shyam Kamani													Gandininagan				
Mike Young													INT INT				
Jainish													shit Anmedabad				
Prakash Bambhania													Mahemdāvād Mahudha				
Adil Shaikh									Kheda								
James France									GUJARĂT Anand								
										~			NUTST Vadod 82024 TomTo				
Unscheduled Wor	rk Ordei	rs											Search Workorders				
Workorder Name	Se	ervice Ac	count	Ow	ner	Worko	order Stat	us	Addre	ss							
00006	biz	ztech ac		Mike	Young	Active			C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india								
00003	su	rendranaga	ır	Mike	Young	Active			Surendranagar, 363001, India								
00002	biz	ztech ac		Mike	Young	Active			C/801 D	ev Aurum	Commercia	Anandnag	gar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india				
Unscheduled work or	der count	: 3															

Unscheduled Work Order Pin: Similarly, when an unscheduled pin is selected in the proximity filter, the search displays nearby unscheduled work orders within the specified radius, updating the **Unscheduled Work Order grid** accordingly.



Resource Selection	: All s	elected (1	10)	•										¢ 🔟 2
< >	today			00	ct 20 – 2	6, 2024			d	ay w	eek	month	Pātri	Unscheduled WorkOrder
Resources								Sun	10/20				Viramgam	Dahegā
100001000	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra SH7	
Test Crew														Sanand
Shyam Kamani													F-4 /2 /2 P32	
Mike Young													Lakhtar	
Jainish														Kheda
Prakash Bambhania														Dholka Nadi
Adil Shaikh													Limbdi	Igodra
James France													NH47 Chuda	NH751 Defined
										~			Children	©2024 TomTom
Unscheduled Wor	k Order	s												Search Workorders
Workorder Name	Se	rvice Ac	count	Ow	ner	Worko	order Stat	us	Addres	ss				
00006	biztech ac Mike Young Active C/801 Dev Aurum Commercial A										I Anandnag	gar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380	015, india	
00003	sur	endranaga	r	Mike	Young	Active			Surendr	anagar, 36	3001, India			
00002	biz	tech ac		Mike	Young	Active			C/801 D	ev Aurum (Commercia	I Anandnag	par Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380	015, india

Unscheduled work order count : 3

To reset the proximity search and refresh all displayed data, simply click the **Refresh Button**. This action will:

- Clear any applied proximity filters.
- Refresh all data shown in the grid, calendar, and map.

As a result, users will see the latest information for both scheduled and unscheduled work orders, ensuring that they have the most up-to-date view of their resources and tasks.

Resource Selection	: All s	elected (10)	•									¢ .	1 <i>C</i>
< >	today			0	ct 20 – 26	6, 202 4			d	lay w	reek	nonth	Pätri Unschedule	d WorkOrder
Resources						Sur	10/20						Viramgam	Volkoldel
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra SH7	A
Test Crew													Sanand	
Shyam Kamani														NEL
Mike Young													Lakhtar	
Jainish														Kheda
Prakash Bambhania													Dholka	Nad
Adil Shaikh													Limbdi	h
James France													HH47 Chuda	Petlad
										~				©2024 Tom Tom
Unscheduled Wor	k Order	s											Search Workorders	
Workorder Name	Ser	vice Acc	ount		Owner		Workorder	Status	Ac	idress				_
00002	biztech ac Mike Young Active								C/(301 Dev Au	rum Comm	ercial Anan	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india	
00003	sure	endranagar			Mike Your	ng	Active		Su	rendranaga	ar, 363001,	ndia		
00004	test	3			Mike Your	ng	Active		Va	dodara, 39	1243, India			

Unscheduled work order count : 10

In the grid, users can view their **unscheduled work orders**. To filter specific records, users can utilize the **Search Work Order** feature. This functionality allows users to quickly find and filter unscheduled work orders by entering relevant keywords or criteria, making it easier to manage and prioritize tasks effectively.



Resource Selection	: All s	elected (*	10)	•									¢ NJ 3
< >	today			00	ct 20 – 26,	2024			d	ay w	eek	month	Mandal Unscheduled WorkOrder
Resources						Sun	10/20						Viramgam Scheduled WorkOrder
	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	Dhrangadhra 847
Test Crew													Sanand
Shyam Kamani													
Mike Young													Lakhtar
Jainish													Kheda
Prakash Bambhania													Dholka Nadi
Adil Shaikh													Bagoora
James France													NH47 Datad Court of Chuda
										~			
Unscheduled Wor	k Order	s											Search Workorders
Workorder Name	Ser	vice Acc	ount		Owner	١	Vorkorder	Status	Ad	Idress			
00002	biztech ac Mike Young Active								C/8	301 Dev Au	rum Comm	ercial Anan	ndnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	sure	ndranagar			Mike Young	, ,	Active		Su	rendranaga	ır, 363001,	India	
00004	test	3			Mike Young	, J	Active		Vac	dodara, 39	1243, India		

Unscheduled work order count : 10

Users can open the **Calendar** and **Map** in full-screen mode for a heightened perspective. This feature provides an immersive view, allowing users to better visualize their schedules and geographical data without any distractions from the surrounding interface.

To enter full-screen mode, simply click the **grid hide/show Button** located on the calendar or map interface. This enhancement facilitates a more detailed and comprehensive analysis of scheduled work orders and resource allocations.



Unscheduled work order count : 10





Users can also enable the **Calendar** in full-screen mode by hiding the grid. This can be done using the **Hide Grid Button**, allowing for a more focused view of the calendar.

Additionally, users can hide the map by using the **Show/Hide Map Button**. This combination of options allows users to maximize their workspace, concentrating solely on the calendar while minimizing distractions from other elements of the interface.



Unscheduled work order count : 10



Resource Selection	: All s	elected (1	0)	•															\$			3
< >	today								Oct	20 – 26,	2024								day	week	mont	ħ
Pasourcas								Sun	10/20												Mon 10	/21
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm	6pm	7pm	8pm	9pm	10pm	11pm	12am	1an
Riyaan			C		۵																	
Kairon																						
Abc test																						
Test Crew																						
Shyam Kamani																						
Mike Young																						
Jainish																						
Prakash Bambhania																						
Adil Shaikh																						
James France																						

Users can create a booking according to resources using the **drag-and-drop feature**. This intuitive functionality allows users to drag a work order from the grid and drop it onto the calendar.

Upon dropping the work order, a popup will appear, pre-filled with relevant fields for the booking. Users can review these pre-filled fields and update them as needed, ensuring that all information is accurate before finalizing the booking. This streamlined process enables users to quickly and efficiently schedule work orders while minimizing the need for manual data entry, making it easier to manage and adjust bookings on the fly.

Resource Selection	: All selected (10)	•						¢ N 2
< >		Oct 20 – 26, 2	+ Create a res	source booking	×	Nawābshāh Hyderābād	Shergarh, Jod Rohat, P	Unscheduled WorkOrder
Resources	6am 7am 8am 9)am 10am 11	Nama			Mithi	Rāniwāra Booking name	Jhalawar
Riyaan			Name -			m	Palanpui	Mandsaur Chāchora ol
Kairon			Start Date *	10/20/2024 12:00 PM	i i	rāna	Booking Start Time	Khāchrod Bhopā
Abc test			End Date *	10/20/2024 12:30 PM	=	Rājkot	Booking End Time	dara Dhar
Test Crew							Work Order Name	²⁷ Dhule
Shyam Kamani			Work Order *	00003 😣	Q	ver	(Lookup)	Rural Motāla
Mike Young			Resource *	Abc test 😣	٩		Resource name (Lookup)	Chāndvad Parbhani Mahārāshtra
- In Indek			Booking Status *	Scheduled 😣	٩		Booking Status (Lookup)	©2024 Navinto ©2024 TomTom ©2024 OS
Unscheduled Wor	k Orders		Booking type	Solid	~ -		Booking Type	
Workorder Name	Service Account	Owner V	Owner	Mike Young			Owner (Logged-in use	er)
00006	biztech ac	Mike Young A		Ŭ		ılad Nagar, Satellite,	ahmedabad, 380015, india	
00003	surendranagar	Mike Young A		Create				
00002	biztech ac	Mike Young A	cure		unagai oross rivau, i raila	ilad Nagar, Satellite,	ahmedabad, 380015, india	
Unscheduled work ord	er count : 3							

Users can modify all data according to their requirements and schedule, except for the **Owner** field, which remains fixed after filling out the form.

Once all other fields are reviewed and updated as necessary, users simply need to click the **Create Button** to finalize the work order booking. This ensures that while users have flexibility in scheduling and details, the ownership remains consistent for effective management.



Resource Selection	: All selected (10)	• •				
		Oct 20 – 26, 2	+ Create a res	ource booking	×	Nawābshān Rohat P Rohat P Scheduled WorkOrder
Resources	6am 7am 8am 9	am 10am 11				ta Mithi Rāniwāra Jhalawar
Riyaan	C C		Name *			Reodhār Palānpur Mandsaur Chāchora
Kairon			Start Date *	10/20/2024 12:00 PM		rāna GUURAT Khāchrod Bhopāl Indore B
Abc test			End Date *	10/20/2024 12:30 PM		Rājkot Vadodara Dhar
Test Crew						rbandar Dhāri Surat 23 Dhule Ather
Shyam Kamani			Work Order *	00003 😣	Q	Veraval Rural Motāla
Mike Young			Resource *	Abc test 🙁	Q	Nashik Chandvad MahaRashtra
1-1-1-b			Booking Status *	Scheduled 😣	۹	62024 Nisvinfo #2024 TomTom @2024 OSM
Unscheduled Wor	k Orders		Booking type	Solid	~	Search Workorders
Workorder Name	Service Account	Owner V	Owner	Mike Young		
00006	biztech ac	Mike Young A				alad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young A		Create		
00002	biztech ac	Mike Young A	chive		agar 01035 Noau, i tarlê	alad Nagar, Satellite, ahmedabad, 380015, india
Unscheduled work ord	er count : 3					

After creating a booking, it will automatically reflect on the calendar and map as a scheduled work order. Users do not need to refresh the scheduled board; the updates will occur in real time. This seamless integration ensures that users have immediate visibility of their bookings, enhancing efficiency in managing work orders and resources.

After creating a booking, users can see their booking on the calendar. By hovering over the booking event, they can access detailed information about the scheduled work order. Similarly, on the map, users can hover the mouse over the pushpin to view the work order details.

Both sets of details are derived from the configuration settings, specifically from the fields that have been enabled for map and calendar hover functionality. This ensures that relevant data is visualized on both the calendar and map, providing users with quick access to essential information about their bookings.



Resource Selection	: All s	elected (1	10)	-									¢ 💷 🕫
< >	today			00	ct 20 – 20	6, 2024				Jay w	eek r	nonth	Nawäbshäh Hyderäbäd Hyderäbäd
Resources	6am	7am	8am	9am	10am	Sun ' 11am	10/20 12pm	1pm	2pm	3pm	4pm	5pm	Karachi Thatta Mithi Raniwara Jhalawar
Riyaan	٥				10004								Nakhtarána eulaszt Ghatol Kháchrod
Kairon				Work Loc	cation: On	site							Indore
Abc test				Work Ord	der: 00001	0.10							Rajkot Vadodara Dhar
Test Crew													Porbandar Dhāri Surat 23 Dhule
Shyam Kamani													Veraval Rural Motăla
Mike Young													Nashik Chāndvad
t = t = t = te													S2024 Nävinfo @2024 TomTom S2024 OS

Unscheduled Work Orders

Unscheduled Work Or	ders				Search Workorders
Workorder Name	Service Account	Owner	Workorder Status	Address	
00006	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015	, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India	
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015	, india

Unscheduled work order count : 3



Unscheduled Work Orders

Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara, 391243, India

Unscheduled work order count : 10



Analytical Dashboard

Note: Available for Azure maps only

恭 Azure : MappyField 365 Service Activity Dashb

• The dashboards are provided in the left navigation panel from the MappyField 365 app in the **Configuration And Dashboards** area.



- > Reporting Dashboard
- > Sales Activity Dashboard
- > Sales Performance Dashboard
- > Service Activity Dashboard



Azure: MappyField 365 Custom Dashboard

- You can configure the custom dashboard as per your requirement by selecting the entity and its relevant records.
- For that navigate to the **Dashboard Configuration** from the MappyField365 app, inside the **Configuration And Dashboards** section

::: Dynamics 365	MappyField 365						SAND	BOX				ନ ଦ	+	7 (<u>چ</u> و	Ф
≡ ⊜ Home	← 8	Focused view	🐼 Show Chart	+ New	🗓 Delete	∨ Ö Refr	sh 👍 Visualize this	iew 🖾 Email a Link	✓ ➢ Flow	🖌 🔟 Run Report 🗸	ط Excel Templates	× :			🖻 Share 🗸	
Recent \u2212	Active	MappyField	d 365 Dashbo	oards \vee							😨 Edit columns	Y Edit filters	P	Filter by ke	yword	
🖈 Pinned 🗸		Name ↑ ~									Created On ~					
Configuration		Account Name St	tart with B								12/31/2024 3:43 PM					
Configuration Entity Mappings		Accounts name s	tart with A								12/31/2024 3:42 PM					
 Map Configuration 																
豐 Security Configuration	n															
Q, Check Ins - Check O	_															
🖉 Dashboard Configur																
Dashboards And Reports																
ार्म Dashboard																
Appointment Check																
CA Configuration An 🔇	Rows: 2															

• From the **Dashboard Configuration**, you can create a new customized dashboard as per your requirement, for that click on the **+ New**.



- You need to insert the following details to customize the dashboard:
 - o Name: Insert the relevant name for the Custom dashboard
 - o **<u>Entity Name</u>**: Insert the Entity name.
 - o **<u>Query</u>**: Insert the Query to customize the records.



- After inserting the details click on **Save** button.
- Now, navigate to the MappyField Dashboards 2 MappyField 365 Custom Dashboard.



• By clicking on the **MappyField 365 Custom Dashboards**, you will get the Custom dashboard which you have configured.



Azure: MappyField 365 Overview Dashboard

- You will get the Azure Overview Dashboard with following dashlets:
 - > Activity Planner
 - > Top 10 Opportunities



• Activities Planner: It displays activities like Task, Appointment, Service Activity of the current month in a map related to activities related to account/customer.



• **Top 10 Opportunities:** It plots top 10 opportunities based on revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.





Azure: MappyField 365 Reporting Dashboard

- By clicking on MappyField 365 **Reporting Dashboard**, you will get the Dashboard with following dashlets:
 - > Activity Summary > My Routes or All Routes
- Activities Summary: It displays summary of all the activities like Task, Phone calls Appointment, Service Activity of current day in list view. You can search the record as per inserting Dates. You can check the user wise Summary. Only a user who has Admin rights will get the Filter option.

			Activity Summary				
From: 01-01-2024		To: 19-03-2025	Activity Status:	~	User/Team: Mike Young	~	T 5
						Search:	
	Activty Type		Activity Count	1	Activity Duration		\checkmark
0	Meeting		166		84 Hr		
0	Task		1		0 Min		
Showing 1 to 3	2 of 2 entries					← Previous 1	Next →

My Routes: It shows a list of all routes for the particular day. For normal user, it shows routes assigned to them or created by them while admin user can view routes of all users. You can check your Route *or* All Routes by selecting from the drop down of Select Route. You can update the Status like Completed/Cancelled along with that you can view the Route and reschedule it.



			My Routes		
Select Route:					
My Routes	~				
Date:		Status:			
18-03-2025	=	All selected (3)		~] 🔽 🖻	
					Search:
Route Name	↓ Assigned By	↓ Priority	↓ Travel Distance	↓ Status	Action
Business Trip	Mike Young	Low	-	Open	€ © √
Client meeting	Mike Young	High	-	Open	€ © √
Product Distribution	Mike Young	Normal	-	Open	€ © √
Showing I to 3 of 3 entries					← Previous 1 Next →



Azure: MappyField 365 Sales Activity Dashboard

- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
 - > Lead By Source
 - > Open Leads
 - > Sales Pipeline
 - > Top 10 Invoices
 - Leads by Source: It will display all open leads based on their source creation. It can be an Advertisement, Employee Referral, External Referral, Partner, Public Relations, Seminar, Trade Show, Web, Word of Mouth and Other.



• **Open leads:** It will display all open leads for the current month.





• **Sales Pipeline:** It will display all open opportunities based on the revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.



• **Top 10 Invoices:** It will display Top 10 Invoices with respect to total amount of the invoice.



Azure: MappyField 365 Sales Performance Dashboard

- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
 - > My New Accounts This Month > Won/Lost Opportunities This Month > New Leads This Month
 - My New Accounts This Month: It will display all open leads created this month.



• Won/Lost Opportunities This Month: It will display all Won/Lost opportunities this month.





• New Leads This Month: It will display new accounts created for the month.



Azure: MappyField 365 Service Activity Dashboard

- By clicking on **MappyField 365 Service Activity Dashboard**, you will get the Dashboard of Service Activities with following dashlets:
 - > Cases Reported Today
 > Cases Resolved Today
 - **Cases Reported Today:** This dashlet would show all the cases reported on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.



• **Cases Resolved Today:** This dashlet would show all the cases resolved on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.





<u>Note</u>: Dashboard will show data only if the respective entity is mapped and has records. In case of customer related entities, it is mandatory to map accounts or contacts entities to view records in the map. Users can redirect to records directly from the dashboard.



Compatible With Mobile Devices

• **MappyField 365** plugin is compatible with **mobile** and **tablet devices**, so sales reps and marketing managers will have flexibility to access data from anywhere and everywhere.





Mobile Application - Live Tracking

Mappyfield is also available as a mobile application and it is used by the employees and it is managed by the administrator or the manager.

After the installation of the mappyfield application you have to enter the domain link in order to access the live tracking of your employees.



There are certain permissions required for the tracking - Camera and Location. When you open the application a pop-up is displayed requesting for access.





By clicking on the Accept option, you will be directed to the Settings where location and camera access should be allowed for all the time.

Mappyfield 365							
has access							
CAMERA							
We need your car	mera permission						
to scan your url f	rom barcode						
scanner.							
LOCATION							
We need your alw	vavs-allow						
location permissi	ion to get						
constant details	about your field						
service activity.	2						
,							
NOTE : Please go to the settings							
and give always-allow location							
permission to use	this application.						
DENV	ACCEPT						
DENY	ACCEPT						



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support@appjetty.com

or you can login to your account @

www.appjetty.com and

click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for Dynamics CRM MappyField 365, please write to **Sales@appjetty.com**