



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)

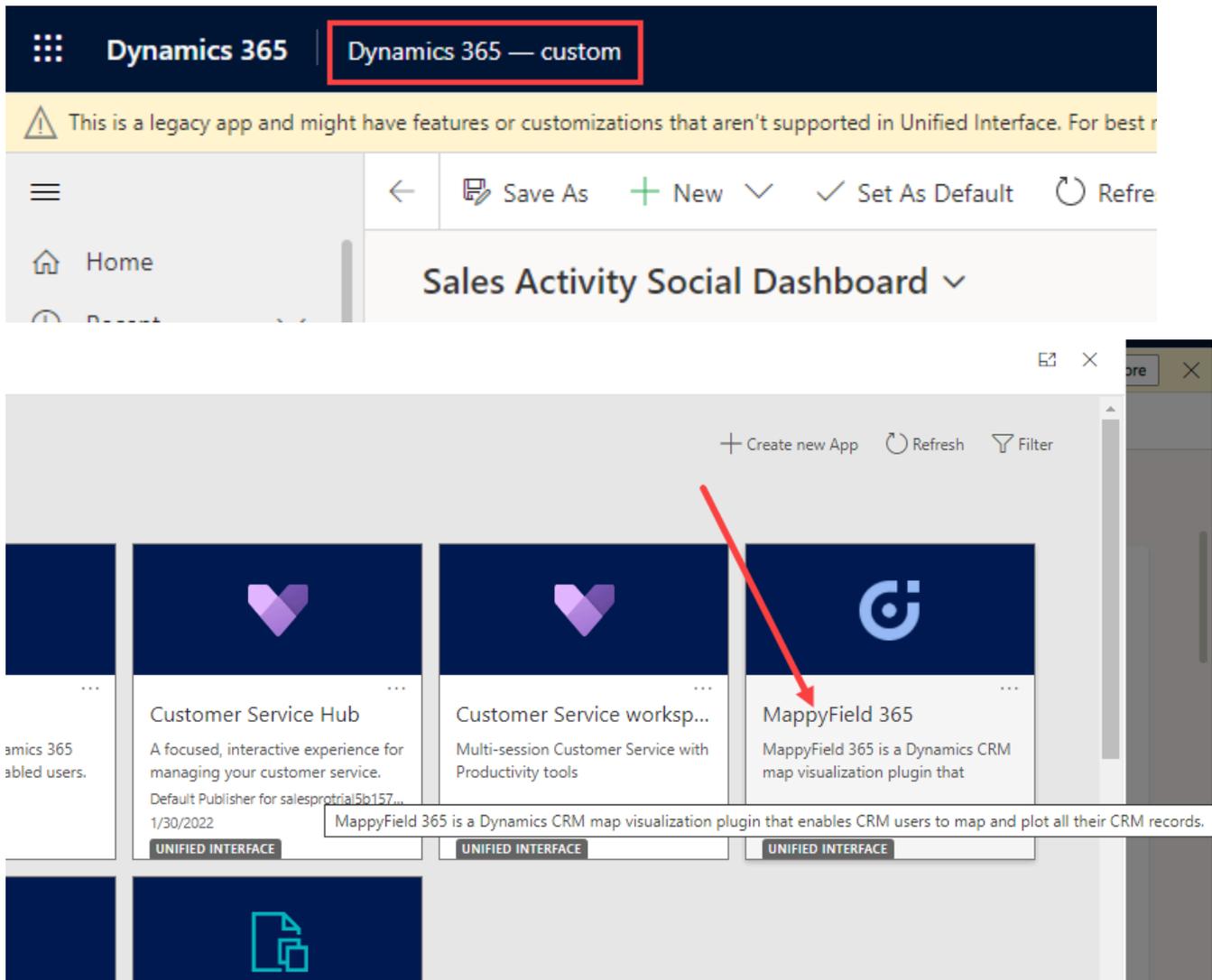
Prerequisites

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 [How to generate Google Map API Key?](#)
- 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

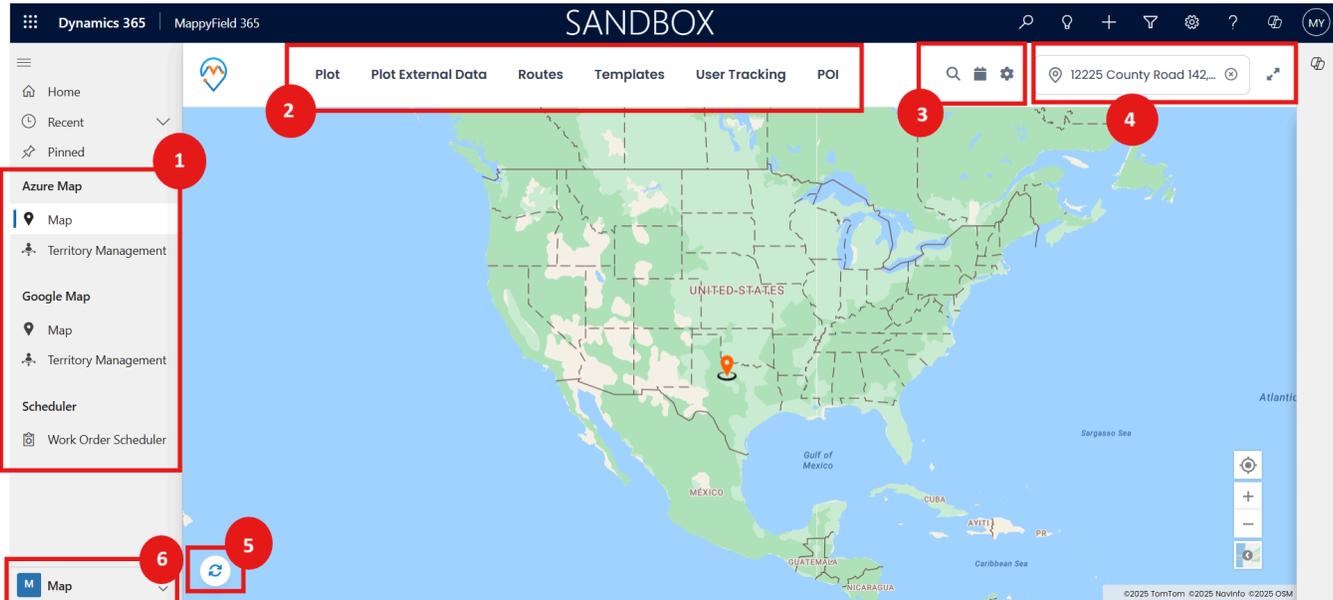
Map view & its options

- 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  a specific record/location,
- Note: You need to contact us in order to access the Live Tracking feature.**
4. The options are:

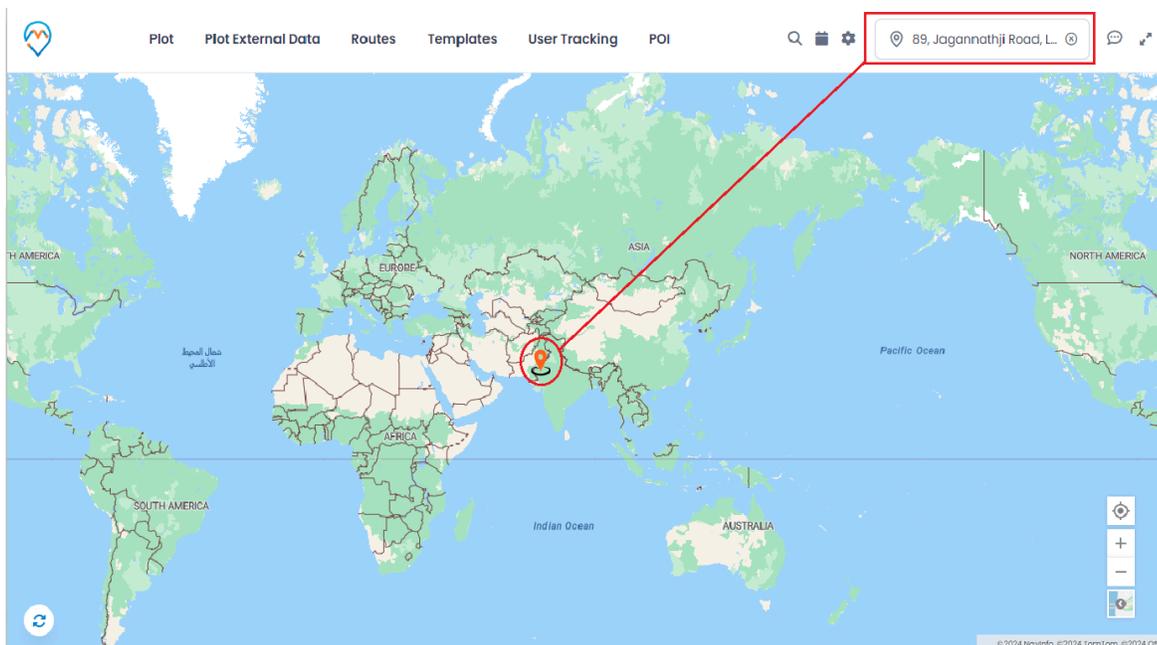
-> Default Location  address details as per the 'Map Configuration Detail'

-> Full View of MappyField 365 map.
 5. Refresh  the MappyField 365 map.
 6. Change the Area to display Configuration and Dashboards.

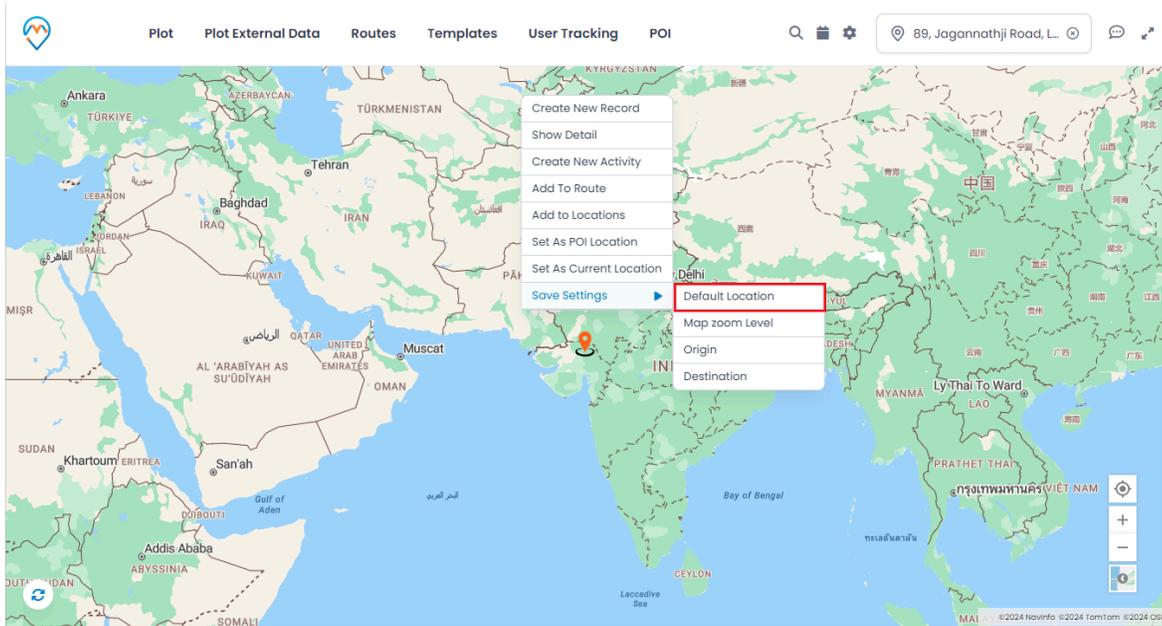


Default Location

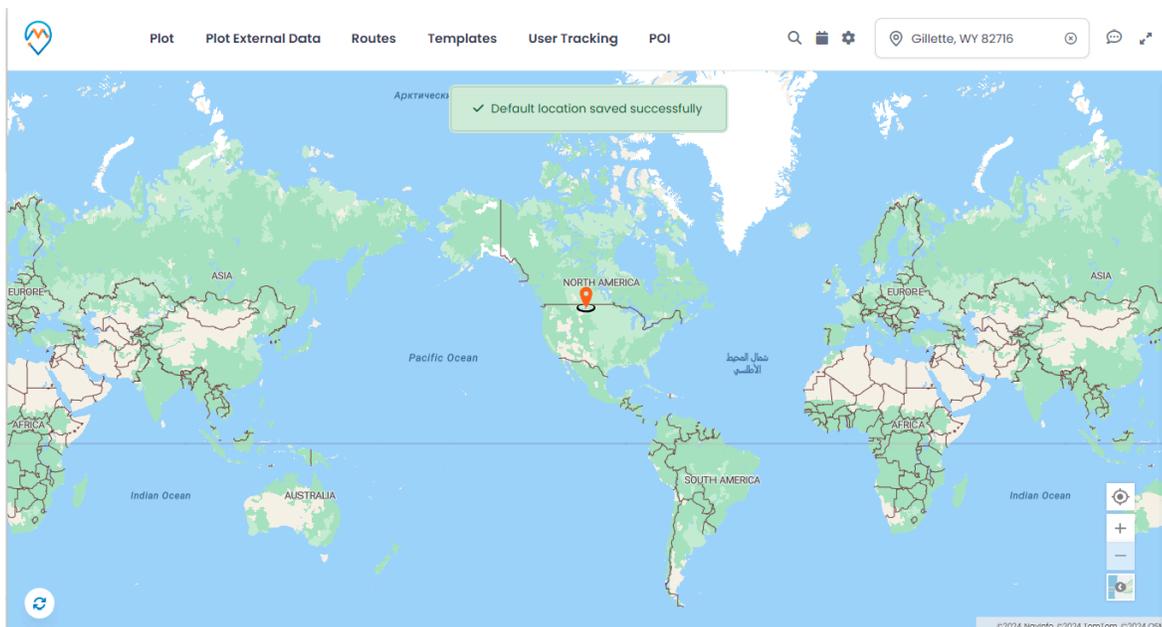
- You will get the default location with the pin  on the map as per the configuration in **Map Configuration Detail**.



- 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**.



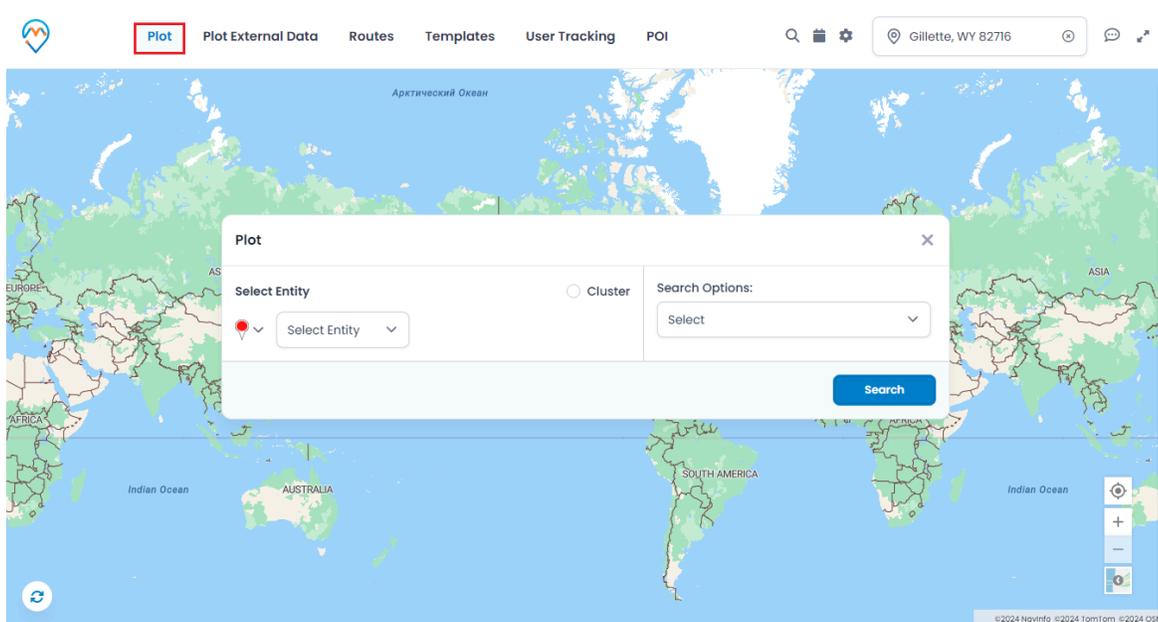
- By clicking on the 'Default Location', the pushpin  the default location will be changed **with a new address** on the map.



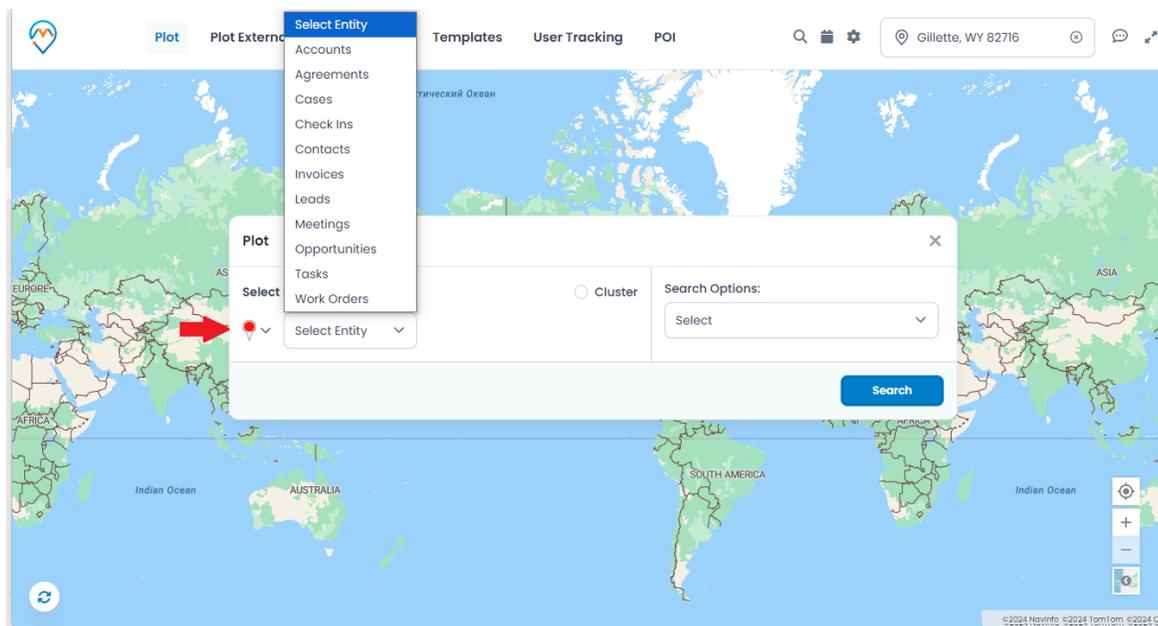
Plot the records on Map

Select Entity

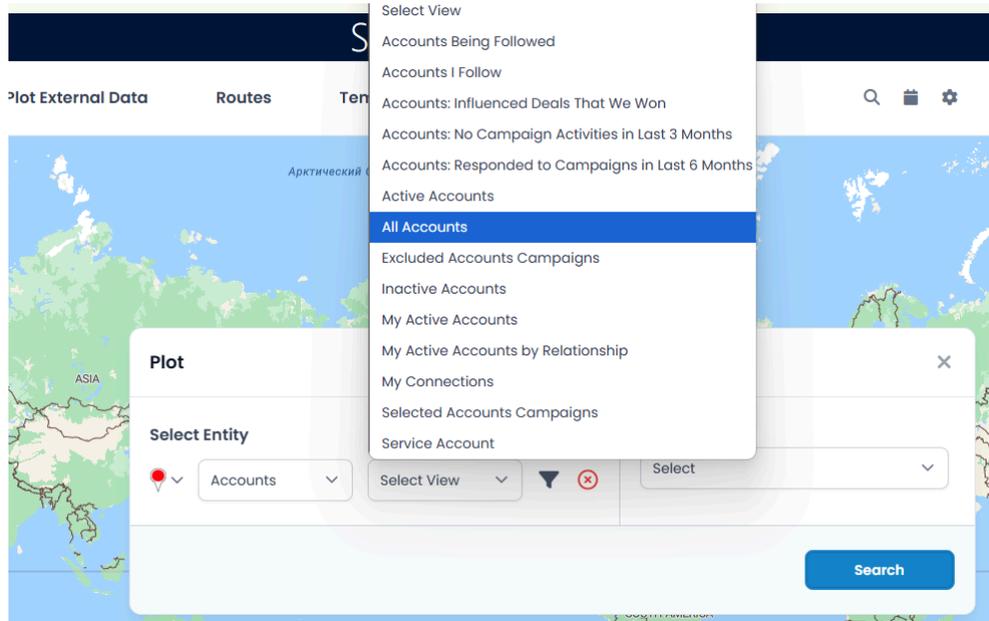
- By clicking on the **Plot**, you can plot the multiple records by selecting the different entities.



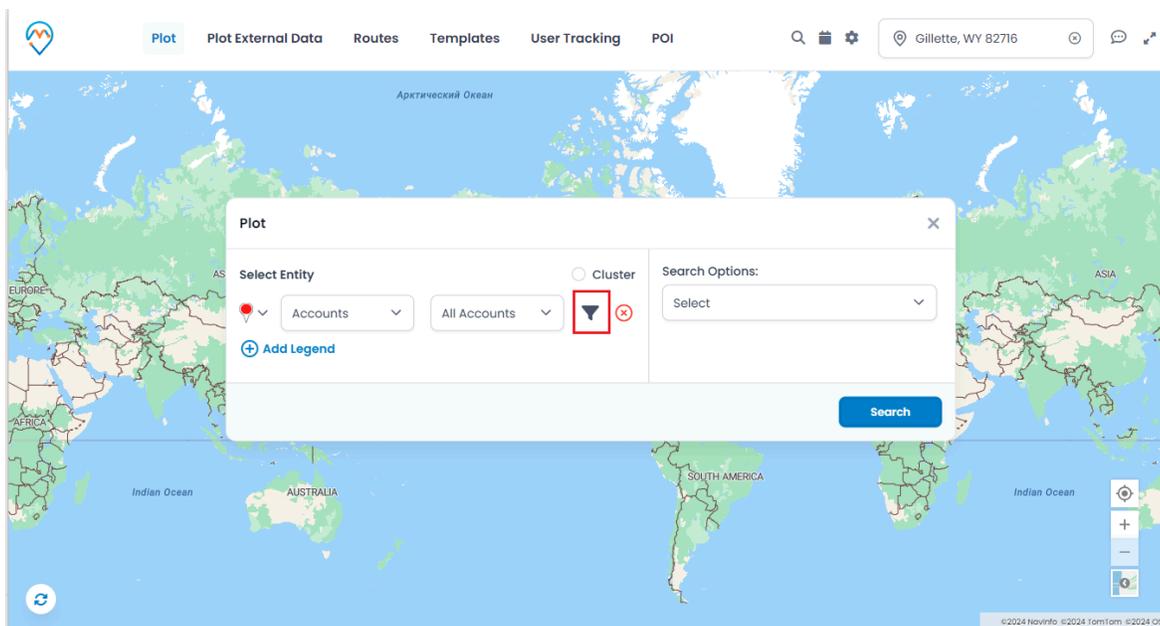
- First, select **Entity** from the 'Select Entity' dropdown option. You will get the dropdown list of entities as per mapped in **Entity Mappings** configuration.



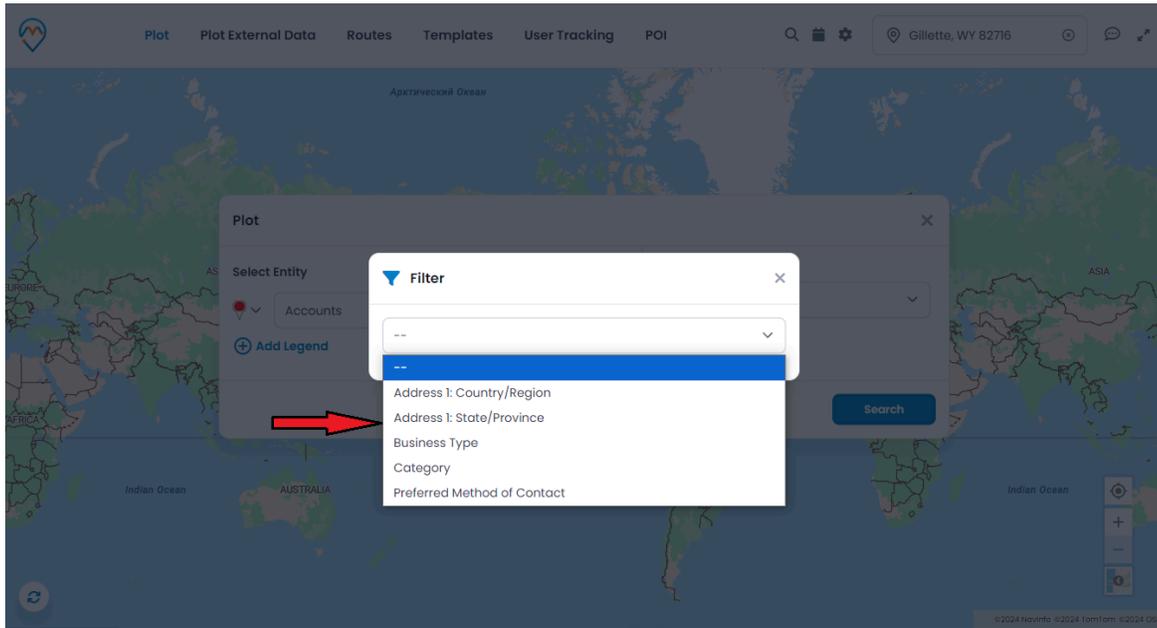
- Select **View** from the 'Select Entity' dropdown option.



- 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.

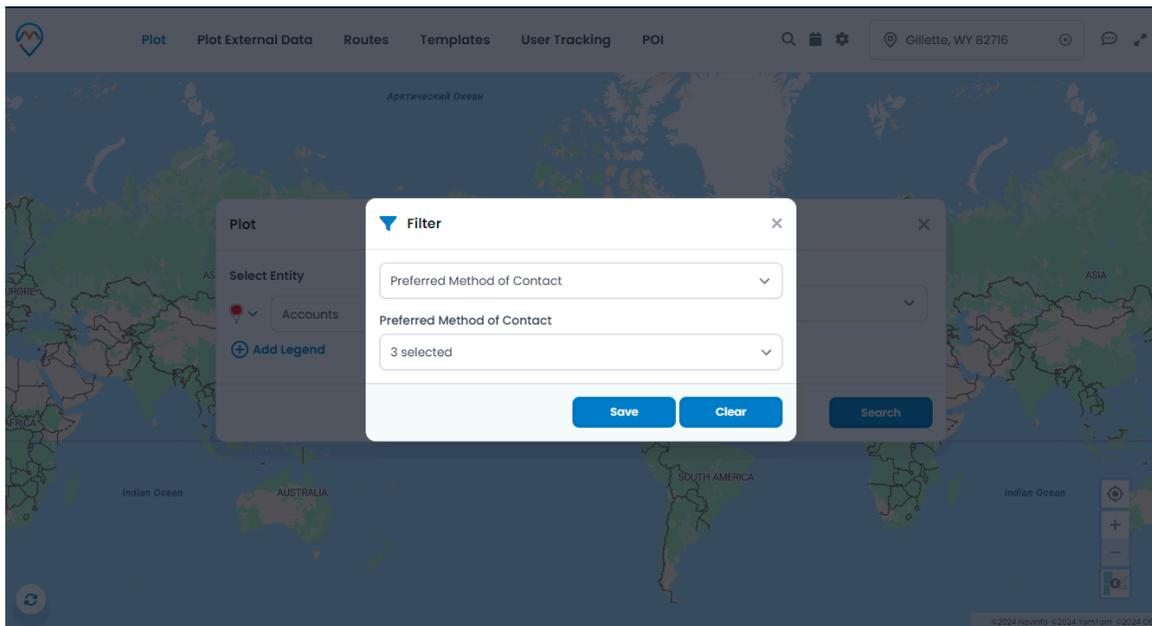


- By clicking on the  'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.

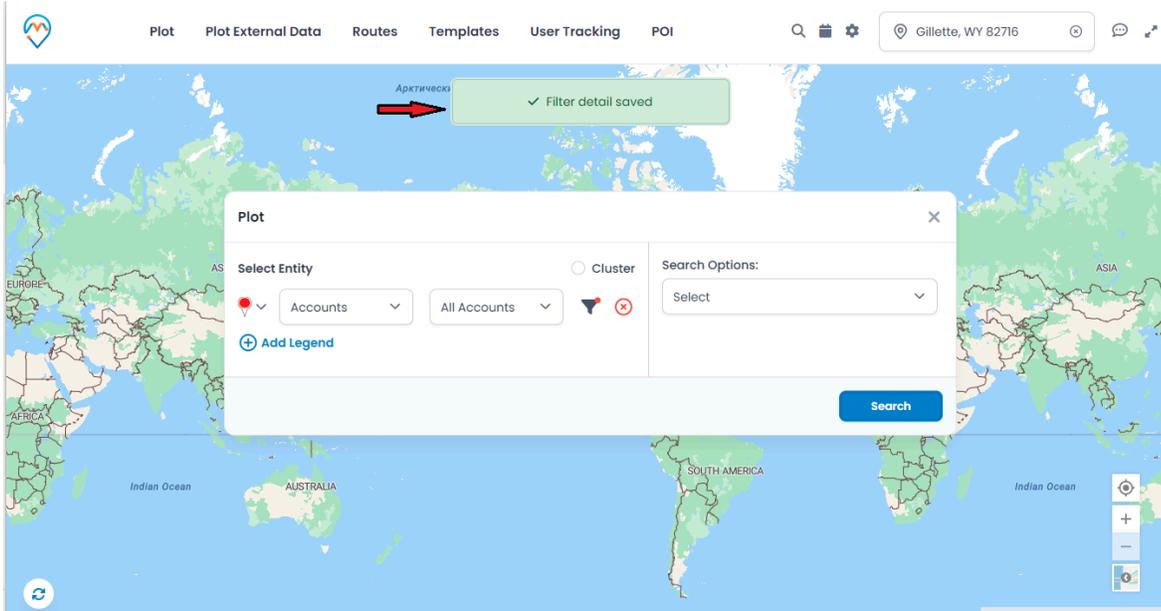


Note: You can plot the records on the map based on the attribute selection that are configured from the option of the 'Entity Mappings' in the Data Filter Attributes option.

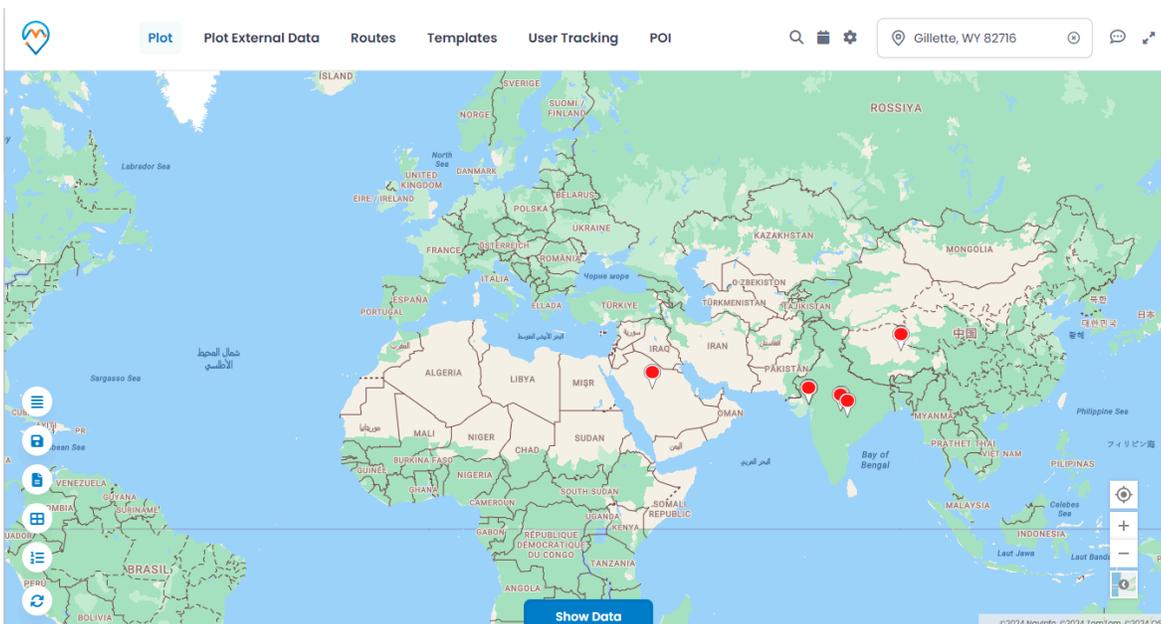
- Once you have selected the Attribute, you need to insert its value. After selecting the attribute and inserting its relevant value to filter the records, click on the **Save** button.



- By clicking on the  'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.

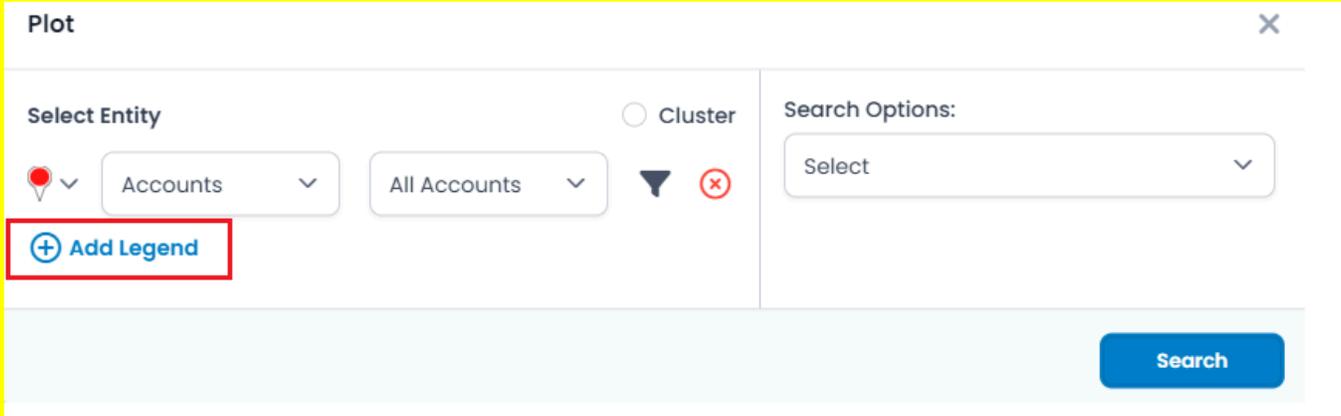


- By using the custom filters, the DynamicsCRM users can plot records between the dates or plot records with the specific status as per configuration in the **Data Filter Attributes** option from Entity Mappings.
- Now, click on **Search** button to plot and view the records of the selected entity **on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



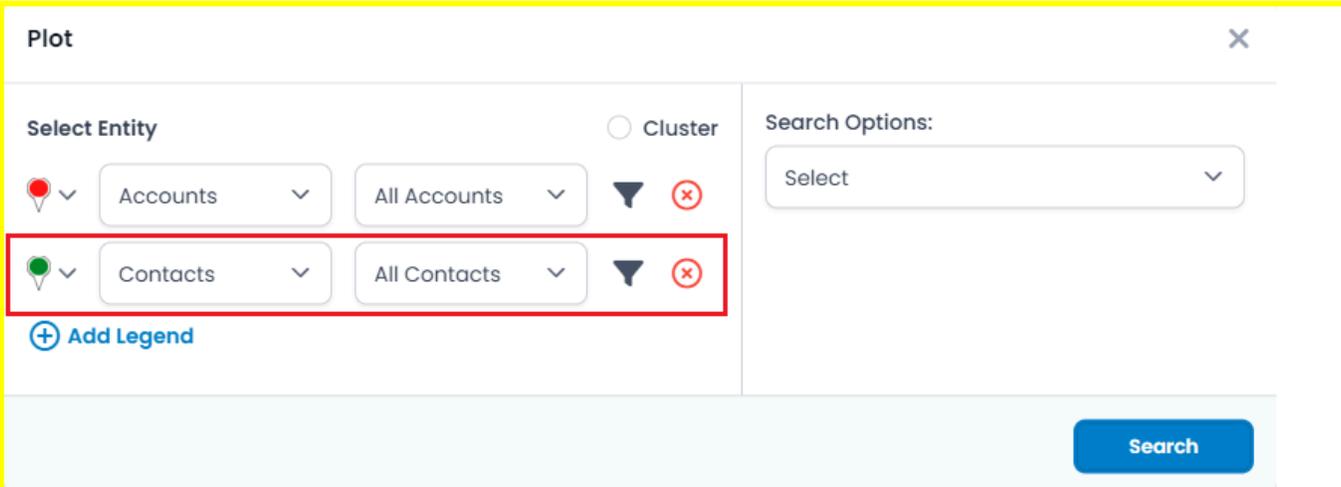
- In this way, you can plot the records by selecting the **Entity** and its attribute in the **View**. The records will be plotted as per the filtered attributed as you have selected the Filter option for the Entity.

- 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.



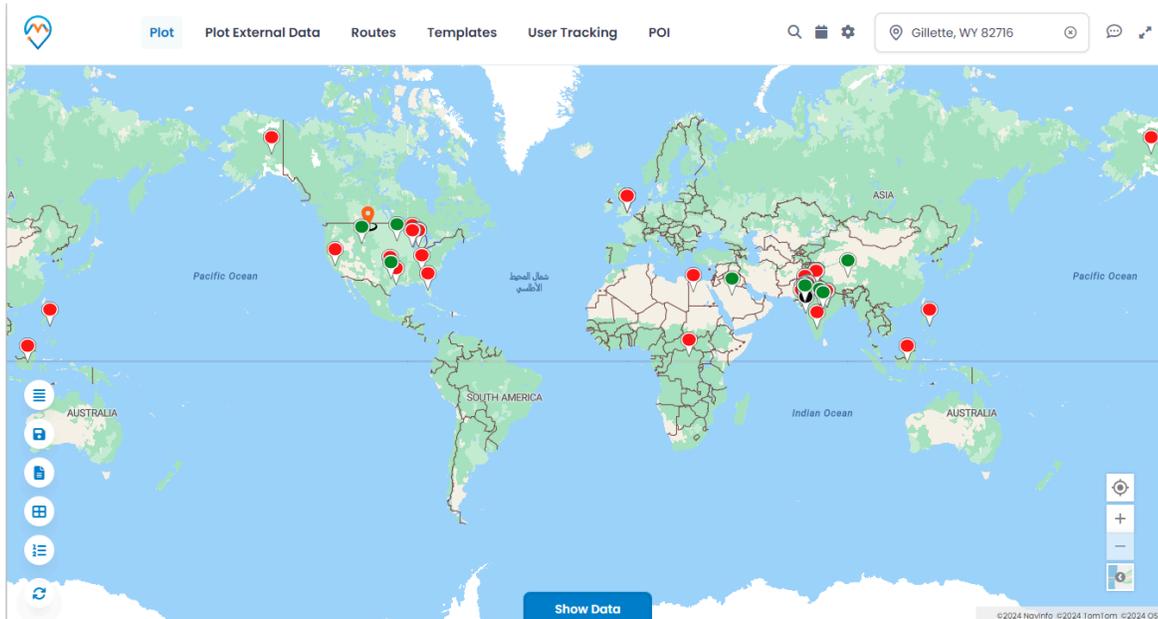
The screenshot shows a 'Plot' window with a 'Select Entity' section. A red pin icon is selected, and 'Accounts' is chosen from the dropdown. Below it, 'All Accounts' is selected from another dropdown. A red box highlights the '+ Add Legend' button. To the right, there is a 'Search Options' dropdown set to 'Select' and a 'Search' button at the bottom right.

- 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.



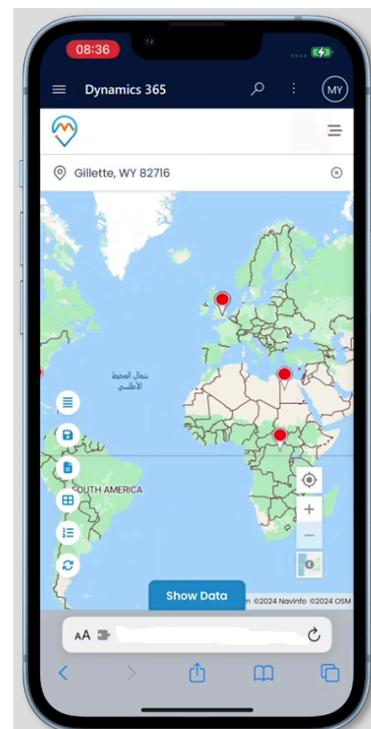
The screenshot shows the 'Plot' window with two entities selected. The 'Accounts' entity (red pin) is still selected, but a second dropdown now shows 'Contacts' (green pin) selected. Below it, 'All Contacts' is selected from the second dropdown. A red box highlights the 'Contacts' and 'All Contacts' selection area. The '+ Add Legend' button is still visible below. The 'Search' button is at the bottom right.

- 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 .



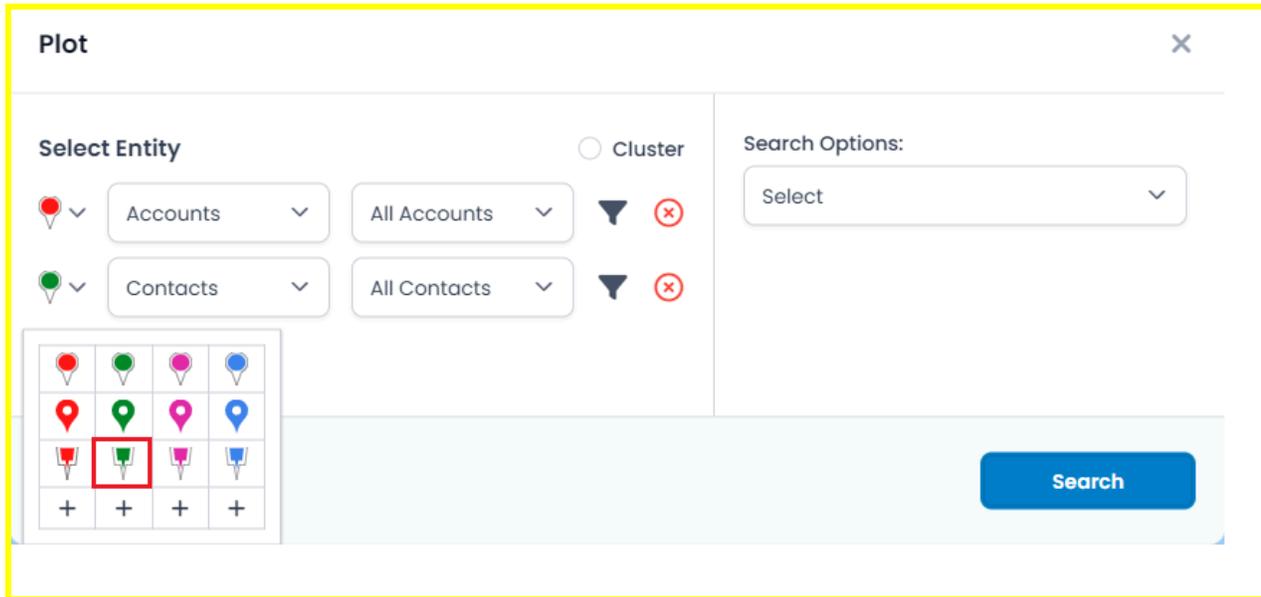
- If entities like Account, Contact or Lead are mapped under the 'Entity Mappings' configuration, only then you can select those entities and plot the records on the map.

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

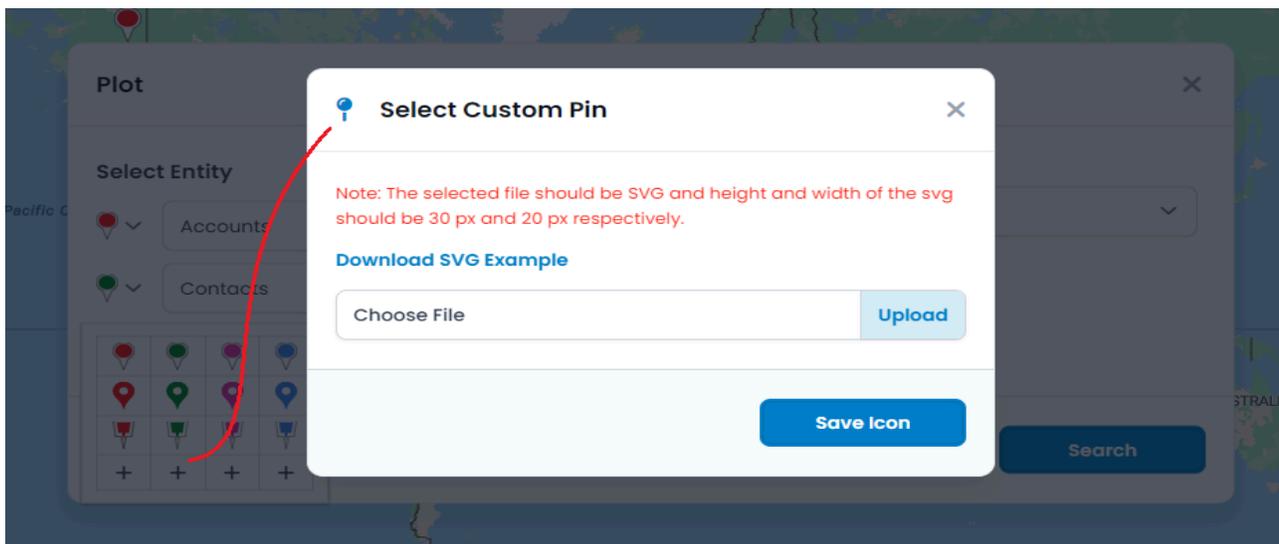


Pin selection for records

- Every time when you add a new entity the pin will be added with a different color.
- Multiple pin 📍 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 📍 of any entity. Select different pins for the multiple entities to differentiate the records on the map.



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



Cluster Map Records

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

Plot ✕

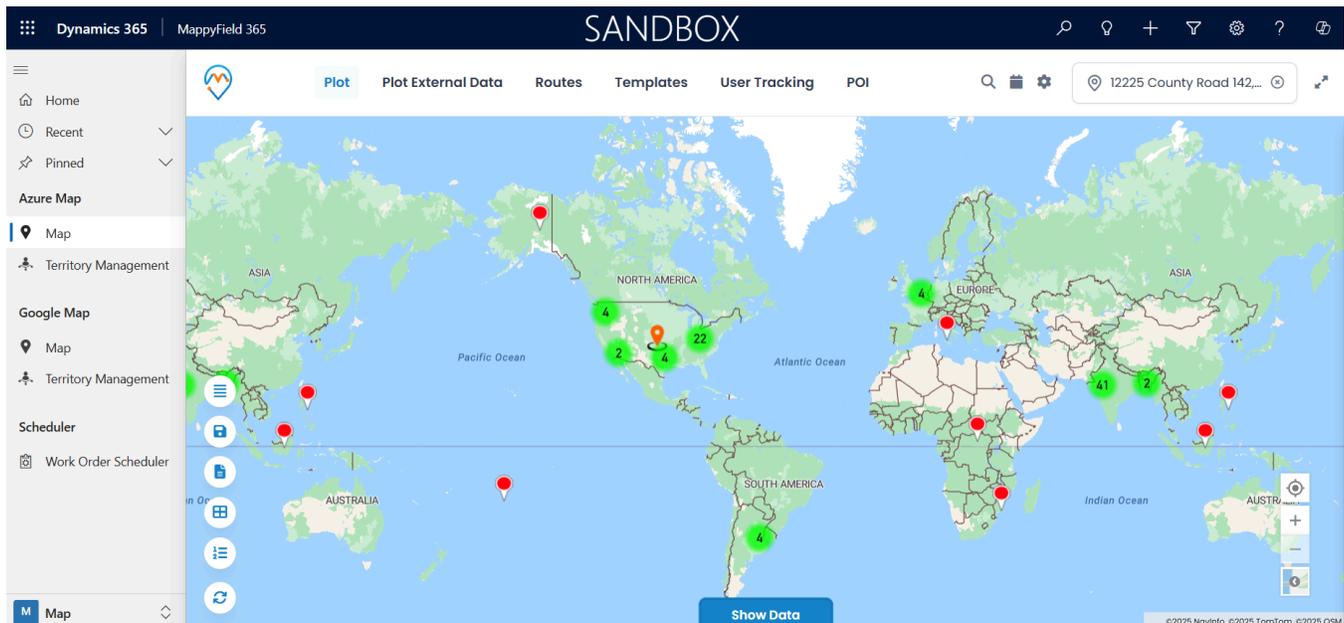
Select Entity **Cluster** Search Options:

 Accounts All Accounts 🔍 ✖ Select

[+ Add Legend](#)

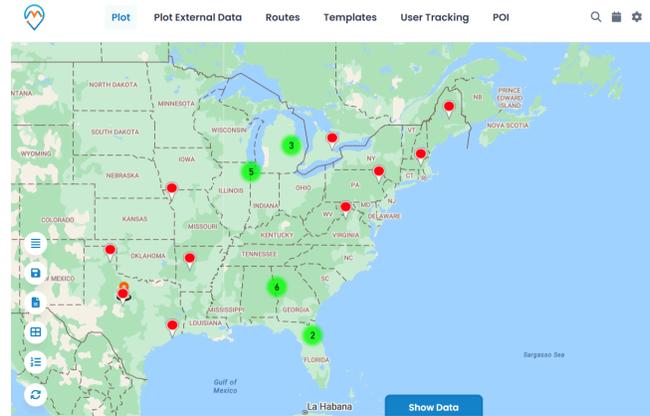
Search

- 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.

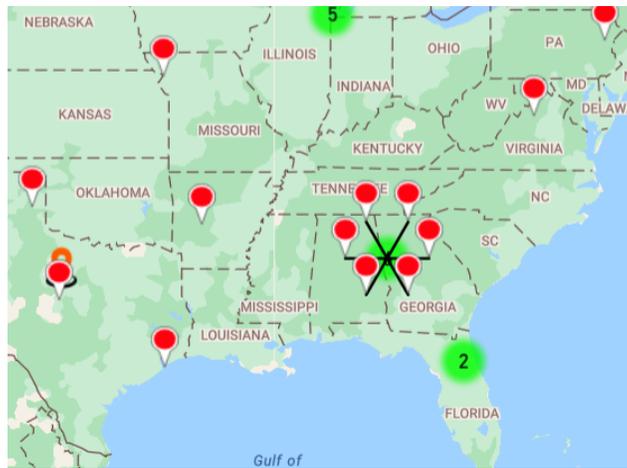


Note:

- 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.

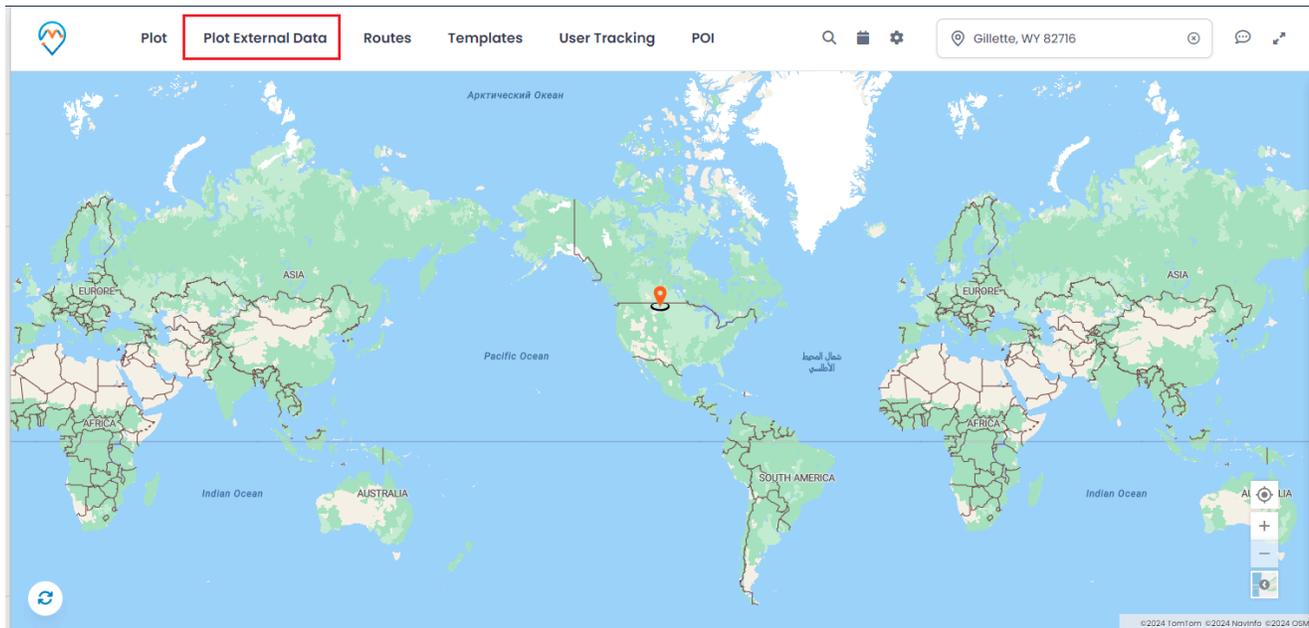


- On clicking any cluster (no. of groups), it will show all the pins in spider cluster form.

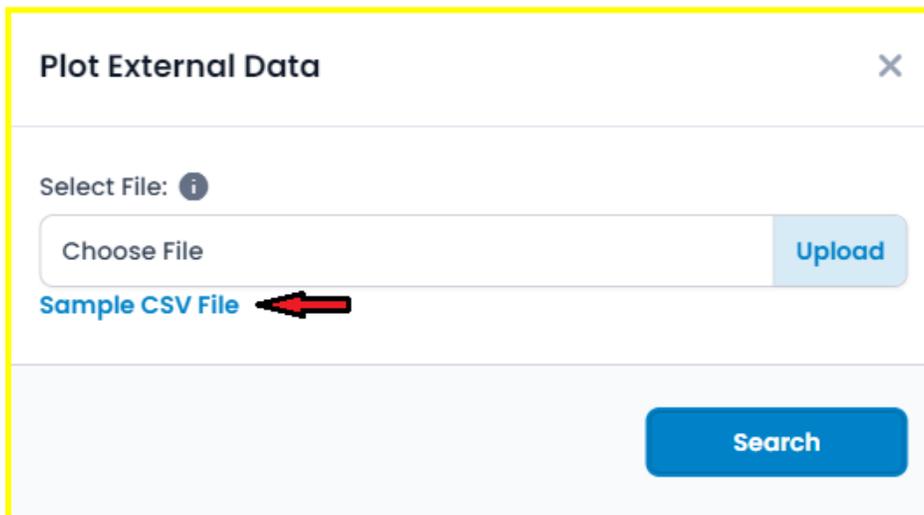


Plot External Data

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



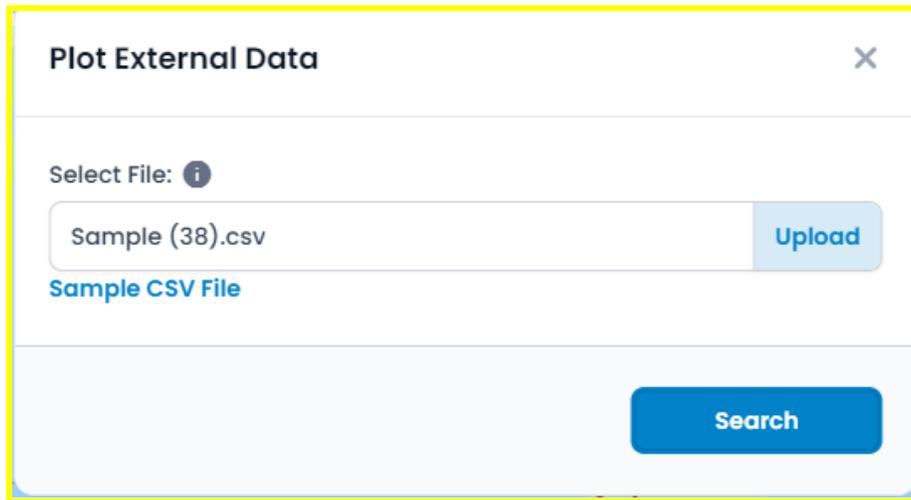
Here, you will be able to download a Sample CSV file.



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.

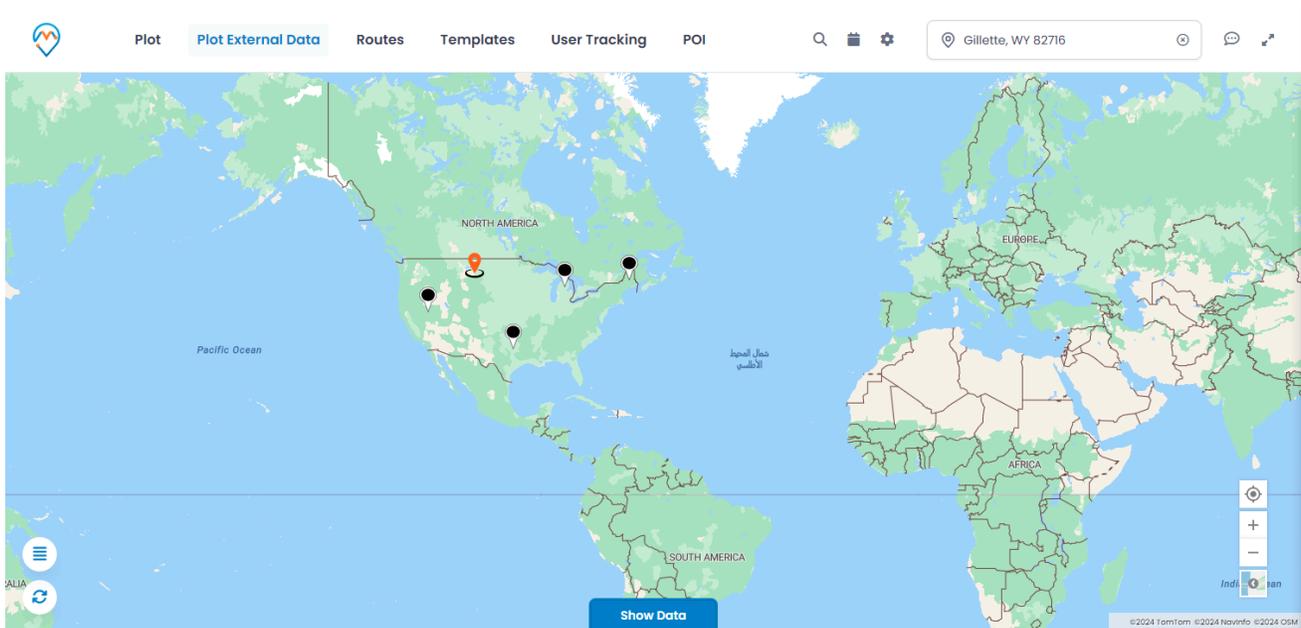
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Record No	Latitude	Longitude	Street1	Street2	City	PostalCod	State	Country	Job type	Company	Education	Email	URL	Phone Nu	Status	
2	Darren Gri	39.87	-117.22	3200 S. Las Vegas Blv		Las Vegas	89109	NV	USA	Manager	Biztech	MCA	Test@gmail.com	www.goo	7.57E+09	TRUE	
3	Adam Smi	45.36	-68.97	3309 Esperanza Cros		Austin	78758	TX	USA	Teach Lea	Biztech	MBA	Test@gmail.com	www.goo	9.43E+09	FALSE	
4	Jack Carte	44.18	-84.5	3000 Bayport Dr		Tampa	330607	FL	United Sts	Senior De	Test	MCA	Test@gmail.com	www.goo	9.33E+09	TRUE	
5	james san	32.65906	-96.7638	3456 B So	1200 main	Dallas	75073	Texas	United Sts	Manager	Test 12	MBA	james@gmail.com		8.96E+09	FALSE	
6																	
7																	
8																	
9																	
10																	

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



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.



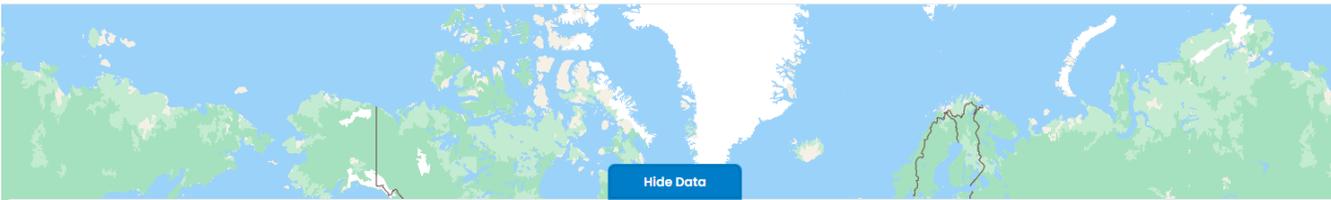
Import Data

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.

Plot Plot External Data Routes Templates User Tracking POI

Gillette, WY 82716



Hide Data

Search:

Copy Excel PDF Print

<input type="checkbox"/>	Record Name	Latitude	Longitude	address	Street1	Street2	City	PostalCode	State	Country
<input checked="" type="checkbox"/>	Darren Grover	39.87	-117.22	3200 S. Las Vegas BlvdLas Vegas89109NVUSA	3200 S. Las Vegas Blvd		Las Vegas	89109	NV	USA
<input checked="" type="checkbox"/>	Adam Smith	45.36	-68.97	3309 Esperanza Crossing Suite 104Austin78758TXUSA	3309 Esperanza Crossing Suite 104		Austin	78758	TX	USA
<input checked="" type="checkbox"/>	Jack Carter	44.18	-84.5	3000 Bayport DrTampa330607FLUnited States	3000 Bayport 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.

Select Entity

Select Entity: Account

CSV Field's	Data Types	Format	CRM Field's
None	None	None	name
Record Name	None	None	None
Latitude	None	None	None
Longitude	None	None	None
address	None	None	None
Street1	None	None	None

Save

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



Plot

Plot External Data

Routes

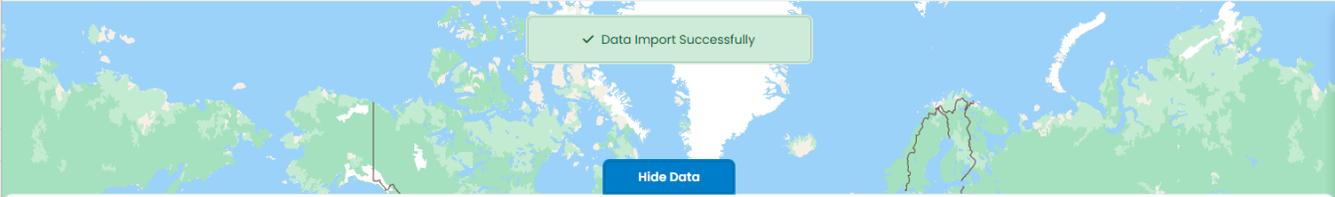
Templates

User Tracking

POI



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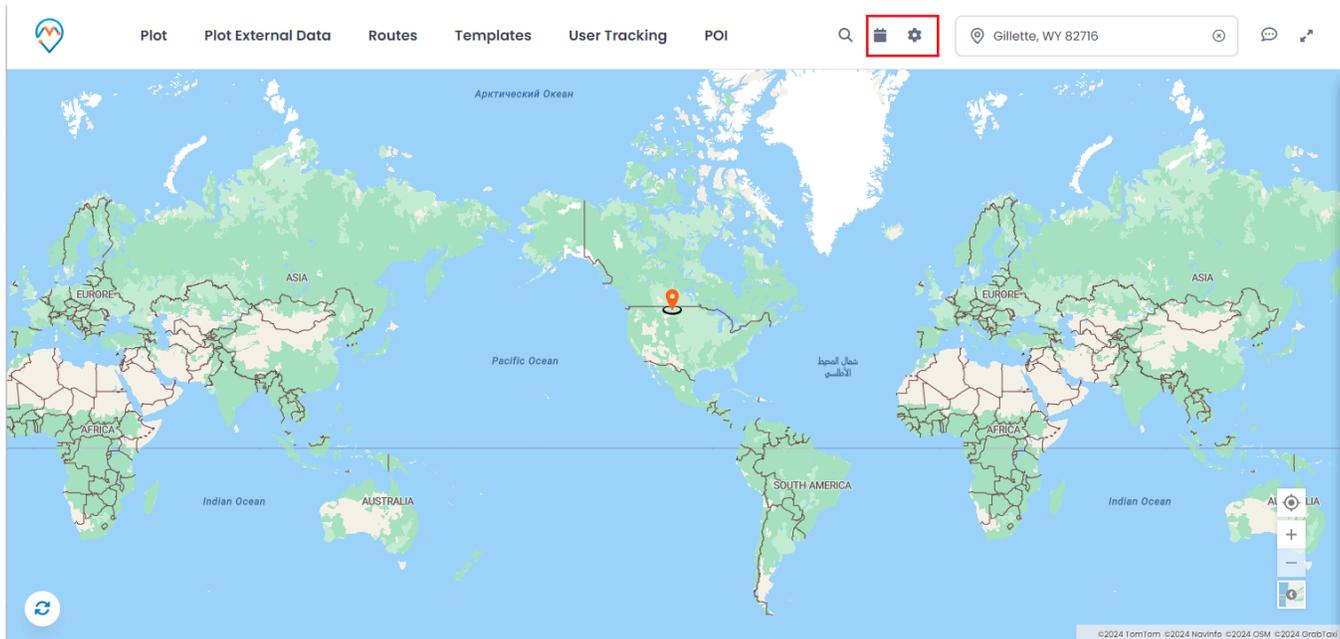
<input checked="" type="checkbox"/>	Darren Grover	39.87	-117.22	3200 S. Las Vegas BlvdLas Vegas89109NVUSA	3200 S. Las Vegas Blvd	Las Vegas	89109	NV	USA
<input type="checkbox"/>	Adam Smith	45.36	-68.97	3309 Esperanza Crossing Suite 104Austin78758TXUSA	3309 Esperanza Crossing Suite 104	Austin	78758	TX	USA
<input type="checkbox"/>	Jack Carter	44.18	-84.5	3000 Bayport DrTampa330607FLUnited States	3000 Bayport Dr	Tampa	330607	FL	United States
<input type="checkbox"/>	james sans	32.65906	-96.76378	3456 B Southampton Rd1200 mainDallas75073TexasUnited States	3456 B Southampton Rd	1200 main	Dallas	75073	Texas United States

Showing 1 to 4 of 4 entries 1 row selected

← Previous 1 Next →

Map view Quick options

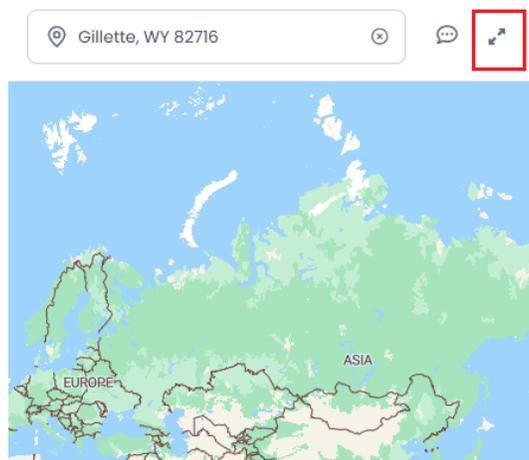
- You will find some quick actions from the header menu of the activity map. The Quick actions are:
 - Calendar View
 - MappyField365 Configuration



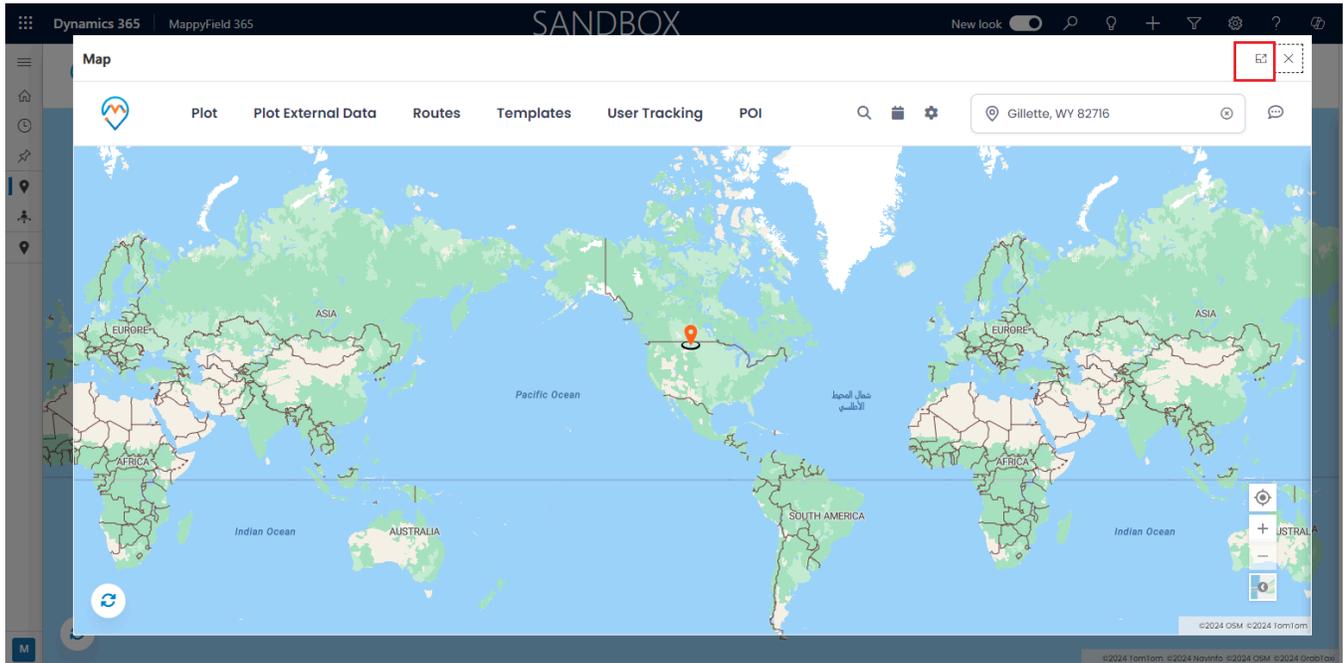
- It will be easy to perform some action from the map itself, you will not require to navigate the individual options. Quick actions for Territory Management are explained in the individual topics.

Full Screen

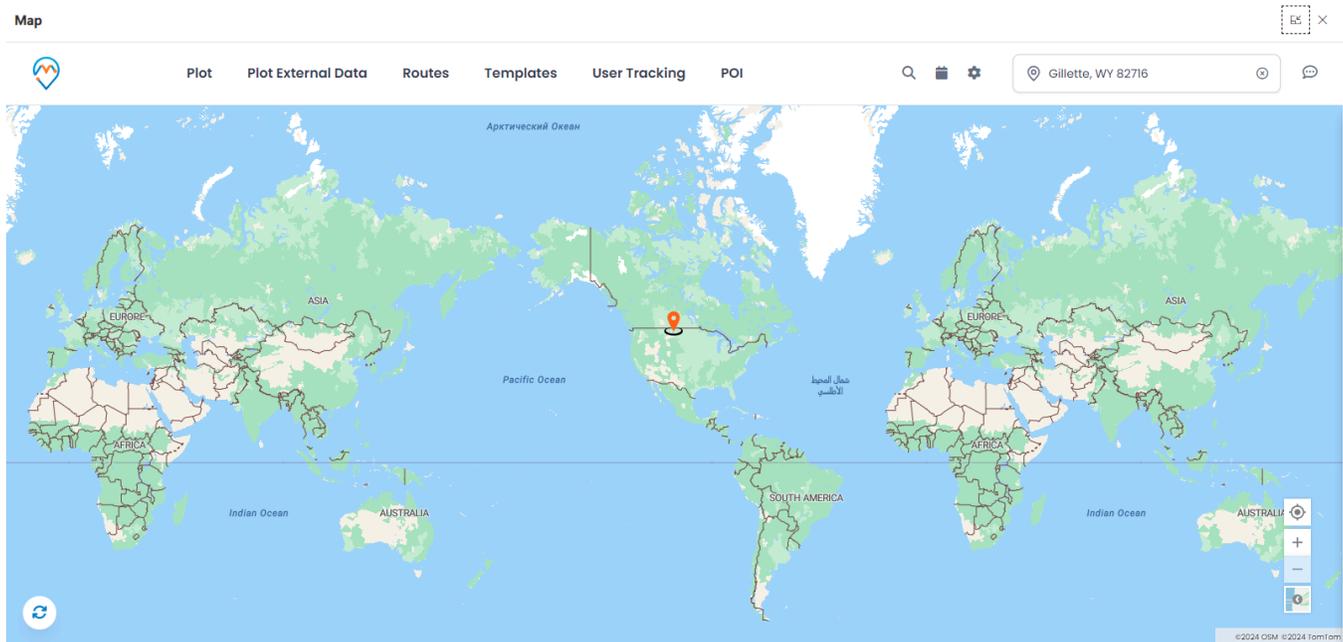
- From the right side on the MappyField365 header, there **is an option for**  Full Screen View.



- 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.

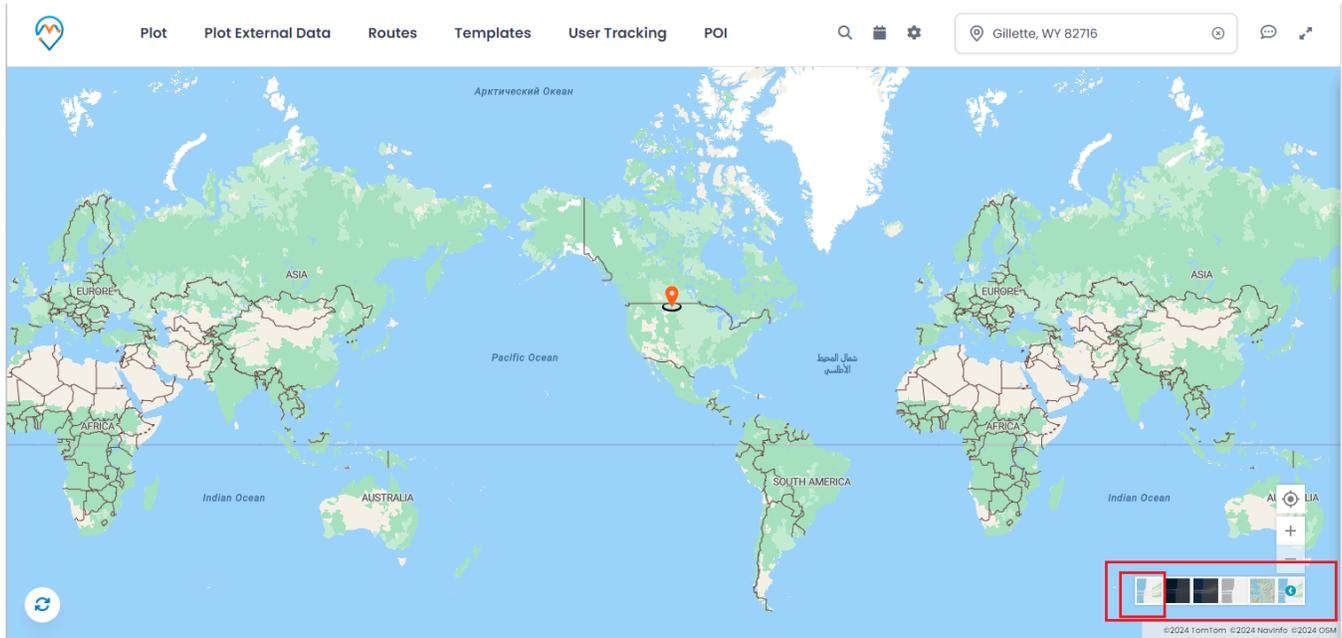


Multiple Map Views

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

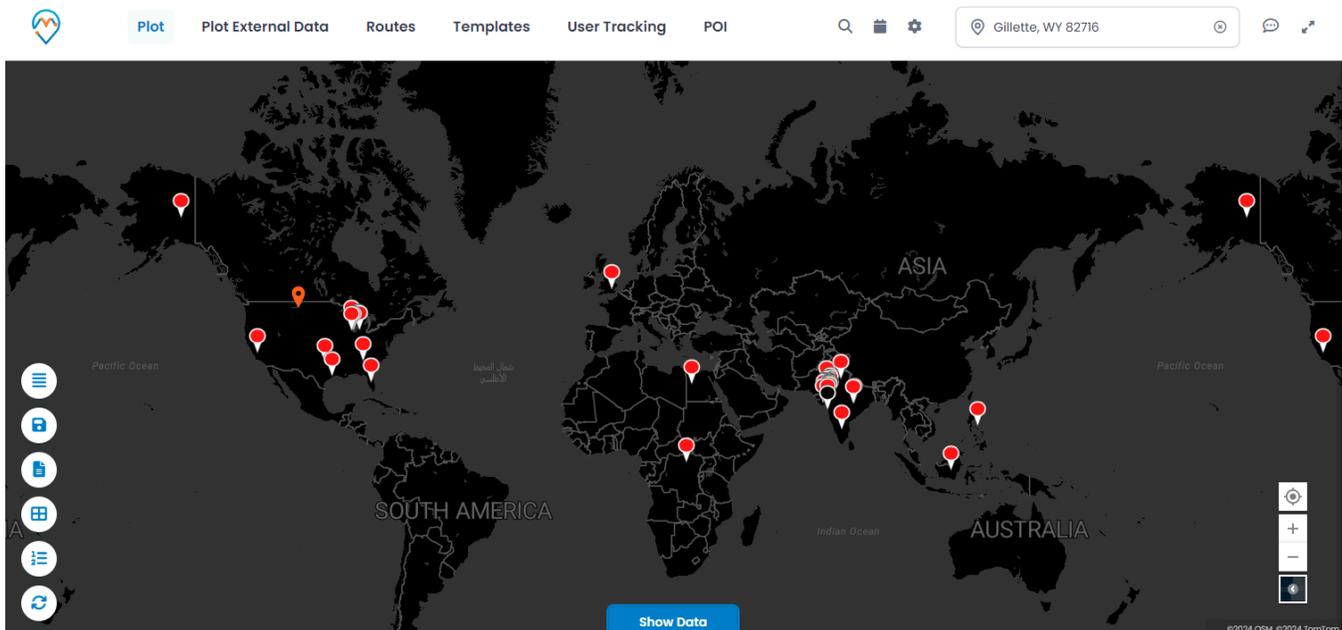
Road Map

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



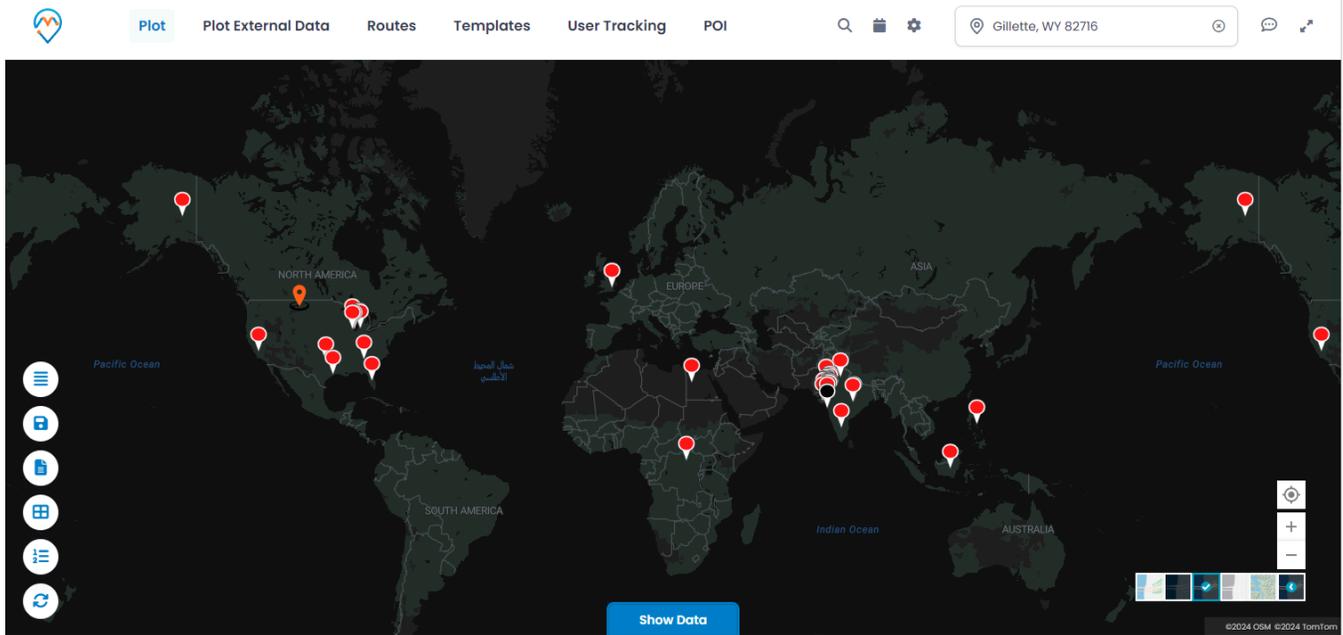
GreyScale(Dark) Map

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



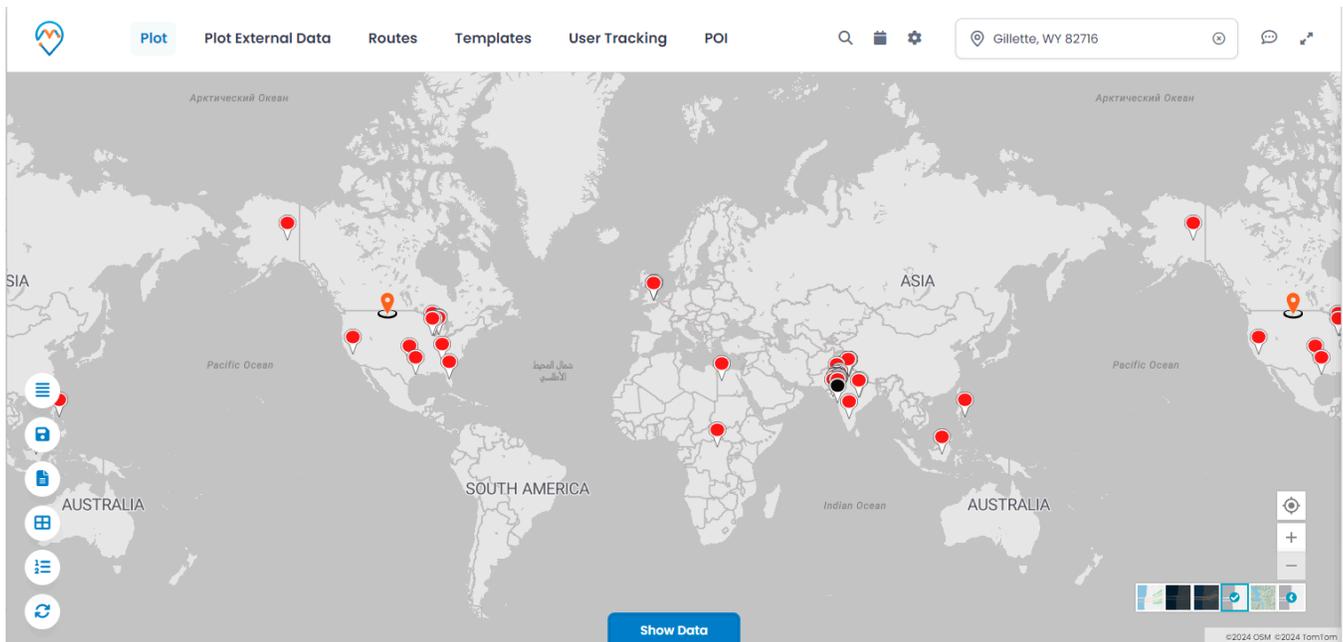
Night Map

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



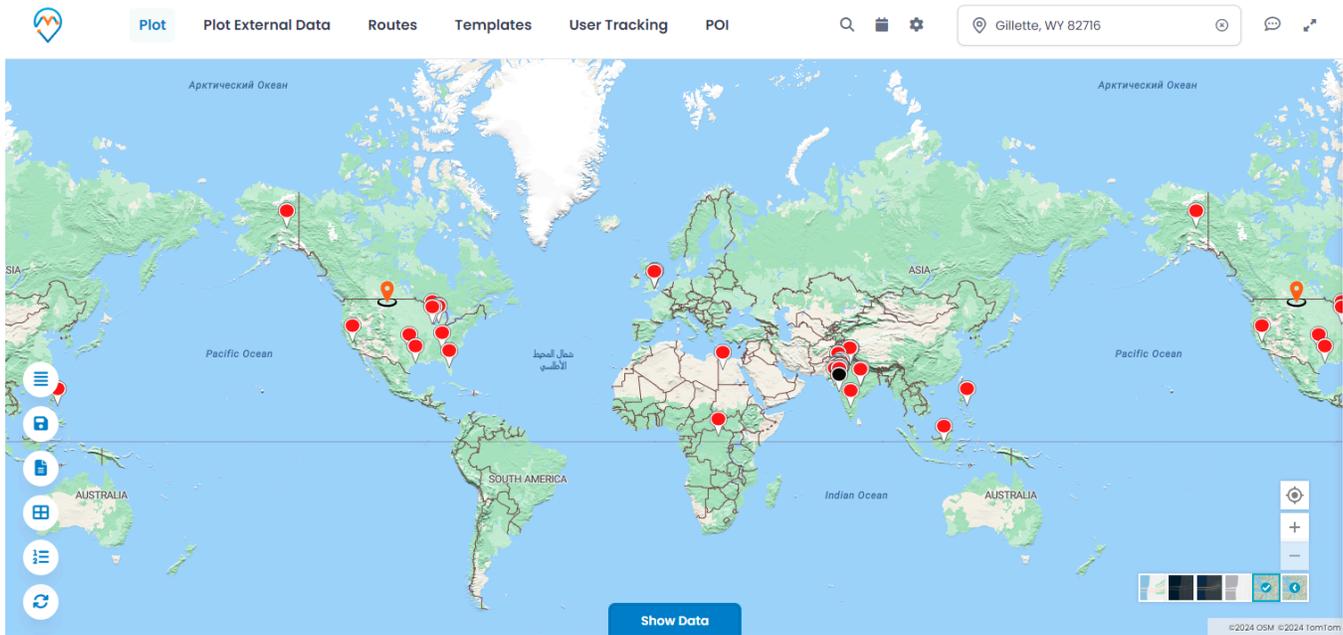
GreyScale(light)

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



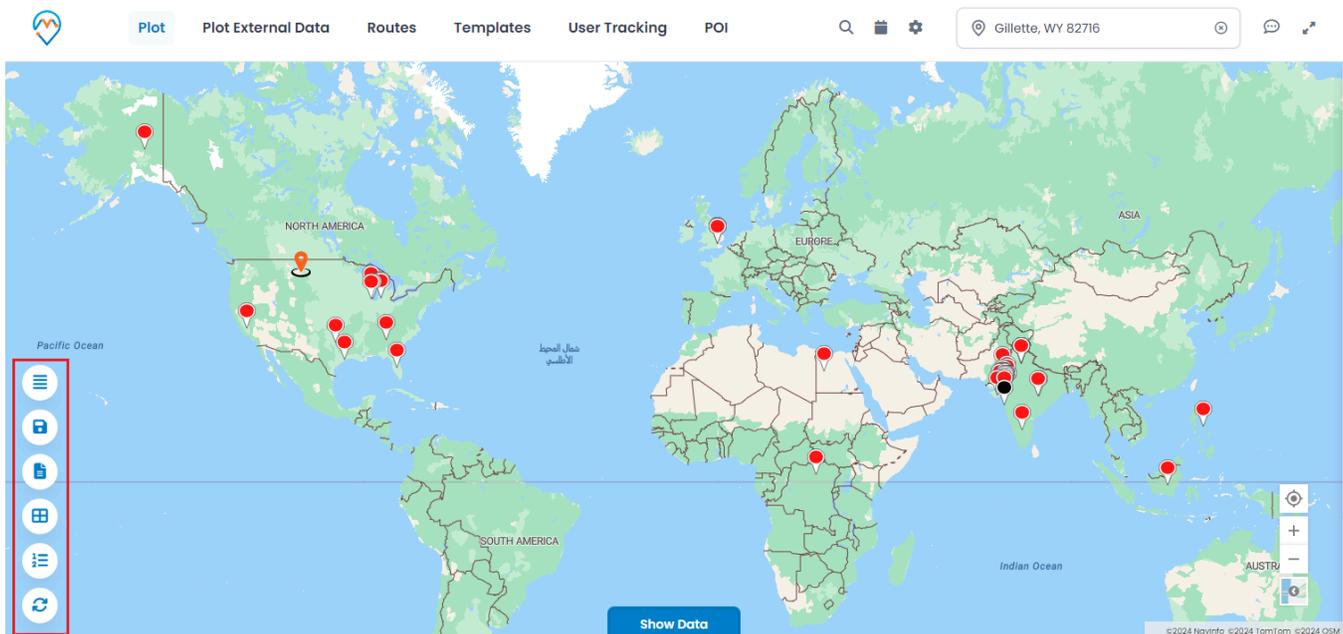
Terra Map

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



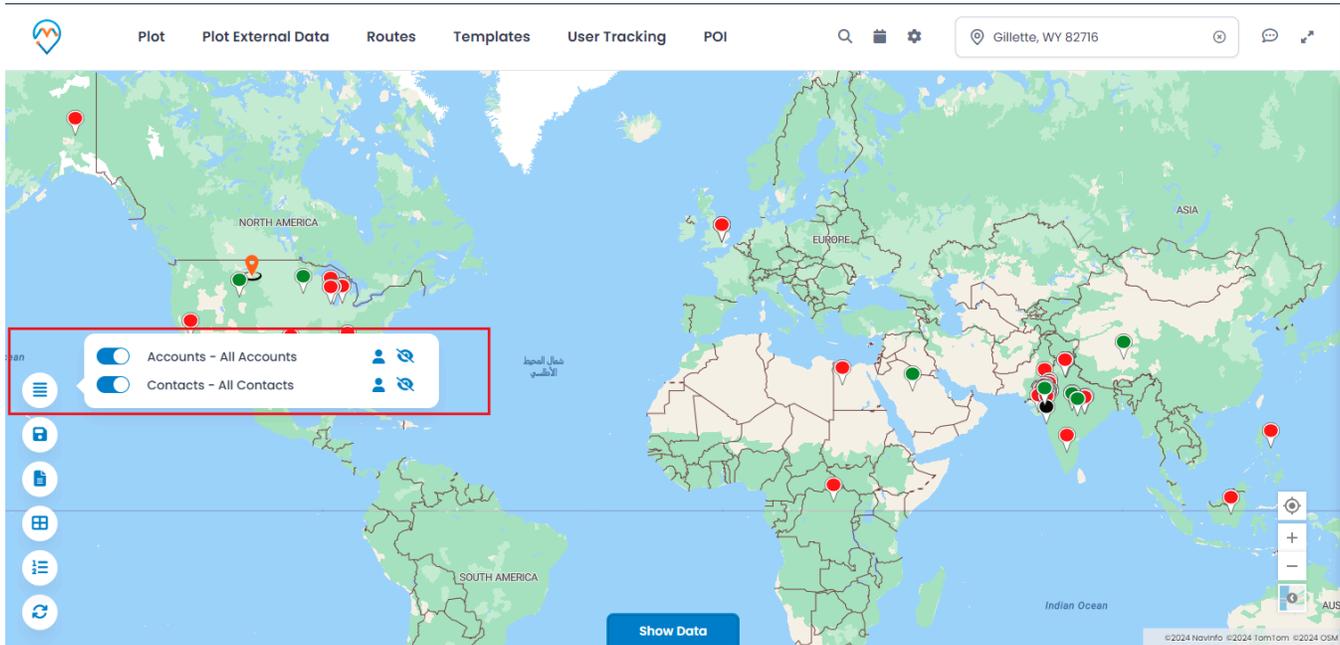
Advance Options

- 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**.

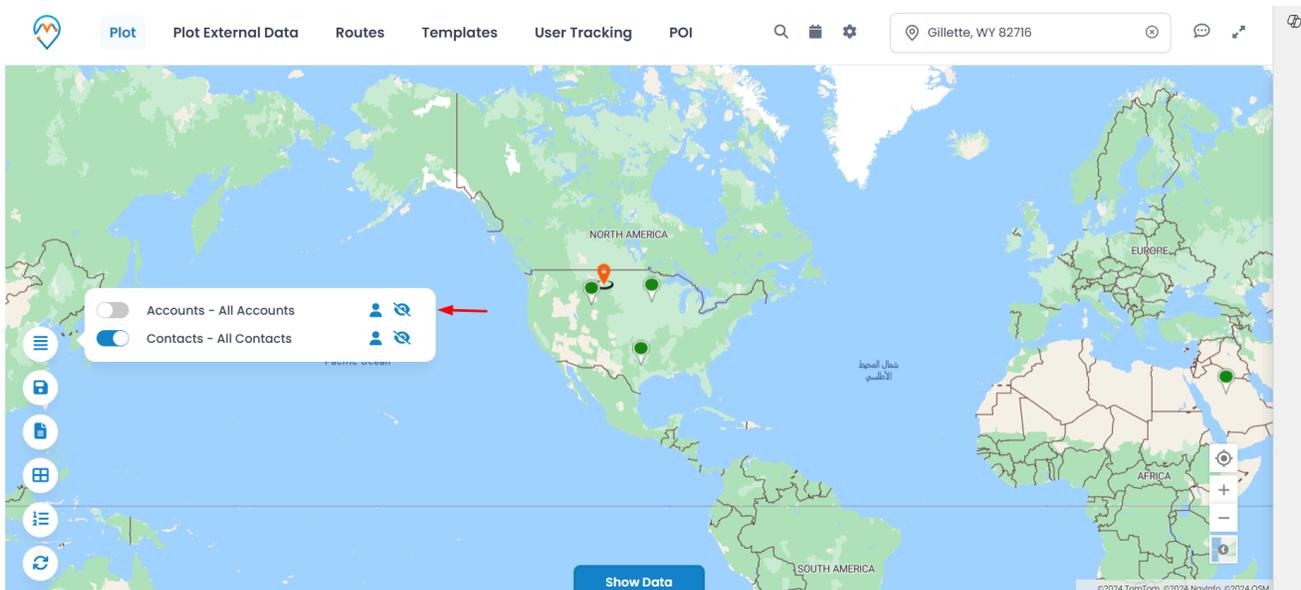


Layer Card

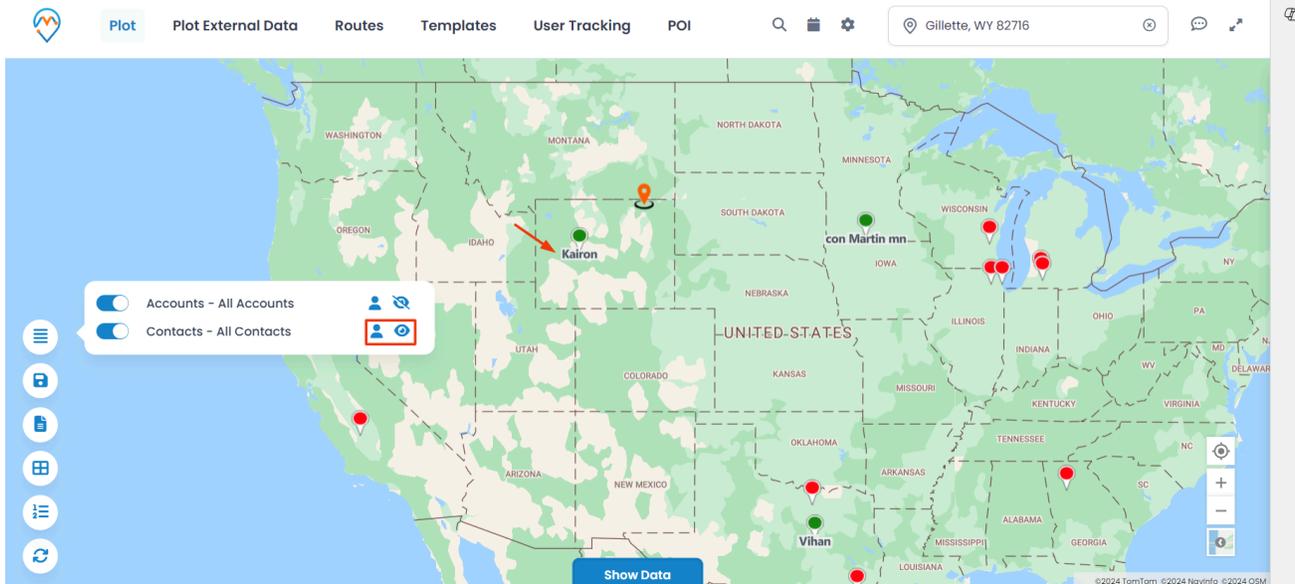
- With every plotting record on the map, it would show each plotting as Layer menu.
- Layer Card (Layer Menu)** displays all plotted records of the entities in one place.



- 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.



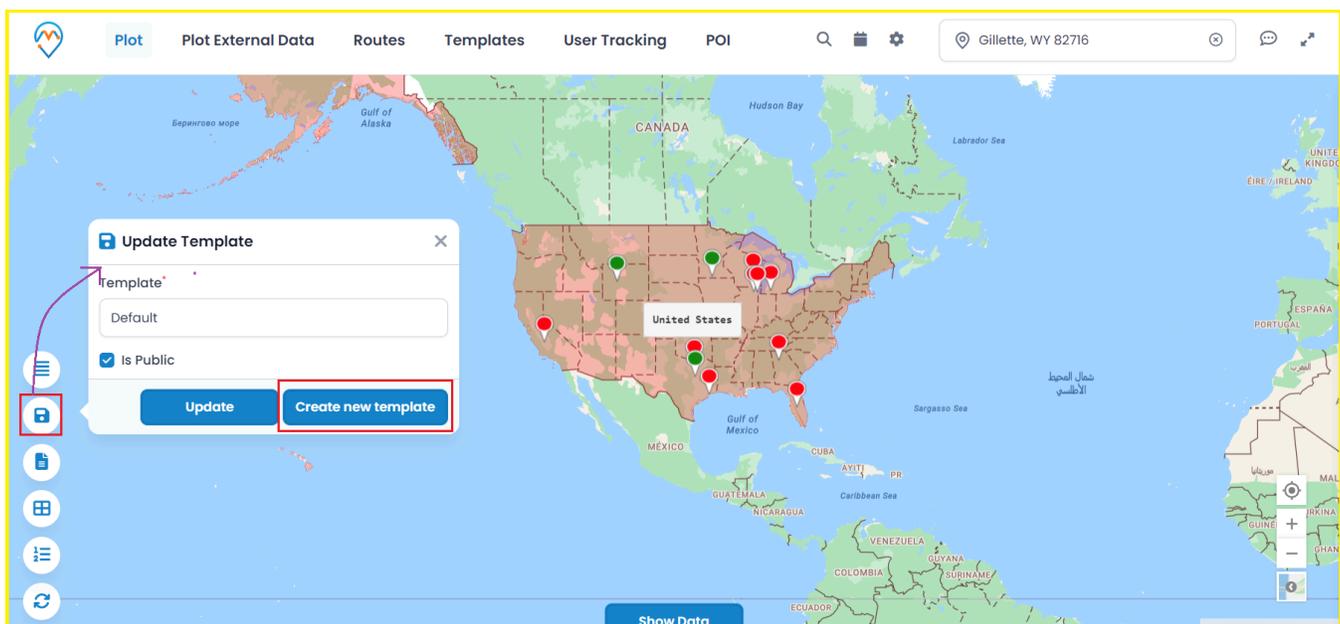
- By clicking on the Invisible icon  of any entity, the icon will turn in to visible  and you can view the **labels** of the **records**.



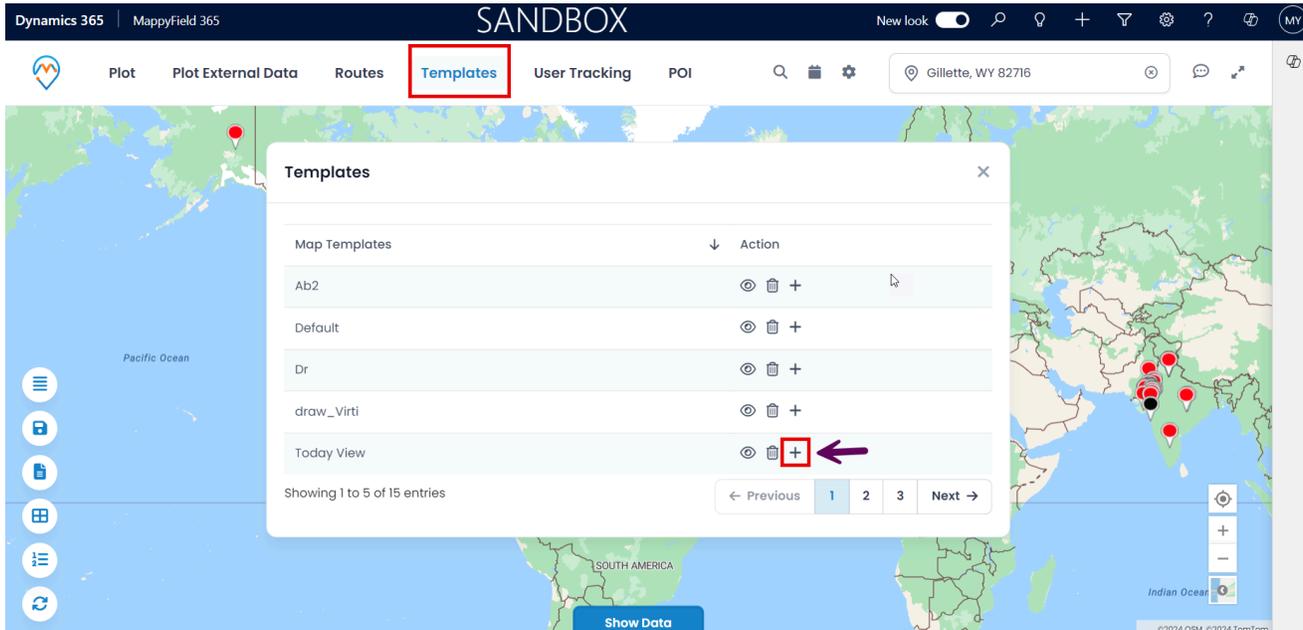
- By making the 'visible' icon of the **Contacts**, the label (name) of the accounts will be visible on the map.

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.



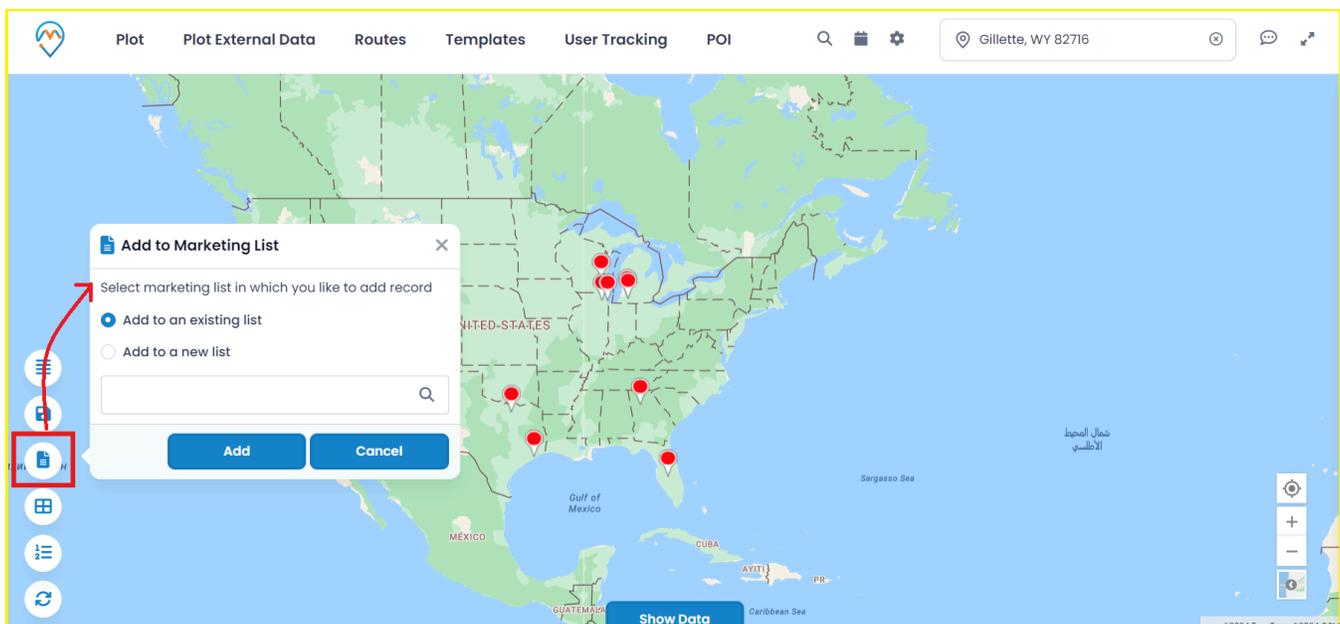
- After inserting the Template name, click on **Create new template** button to save the template for future reference.
- You can check the saved templates from the **Templates** tab from the header.



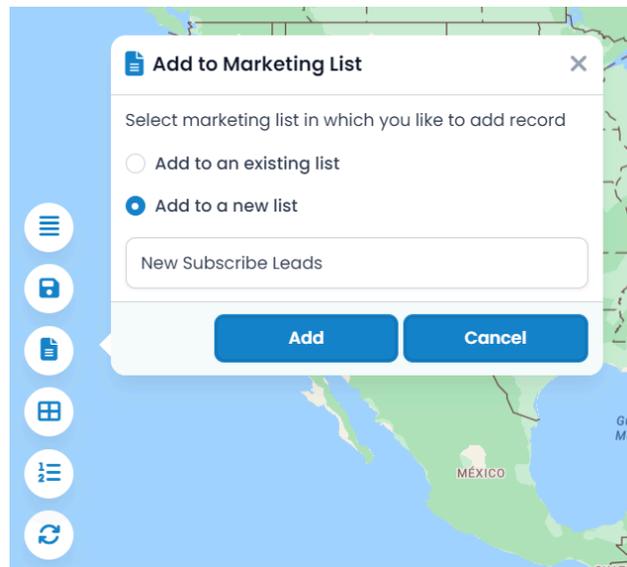
- To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the activity map (Map), it will load with the default template records.
- By clicking on the view icon, you can view the records of that template on the map. You can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



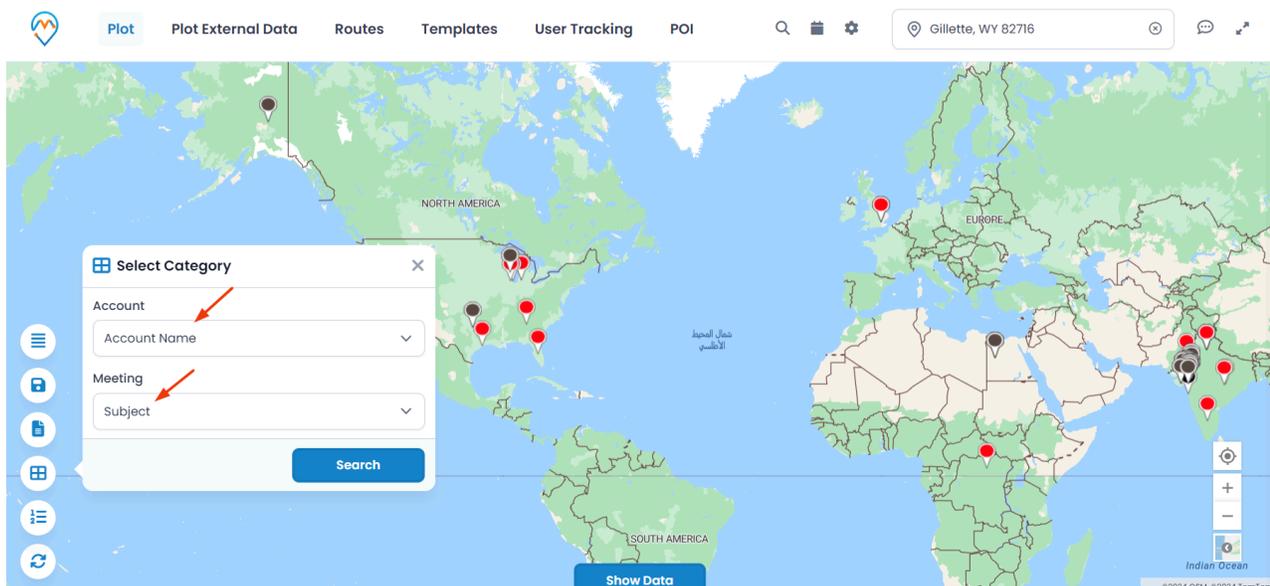
- You can get the “Marketing List” by clicking on Search icon 🔍 if it has already been created in Marketing -> Marketing List or you can add to a new list by selecting the “Add to a new list”.



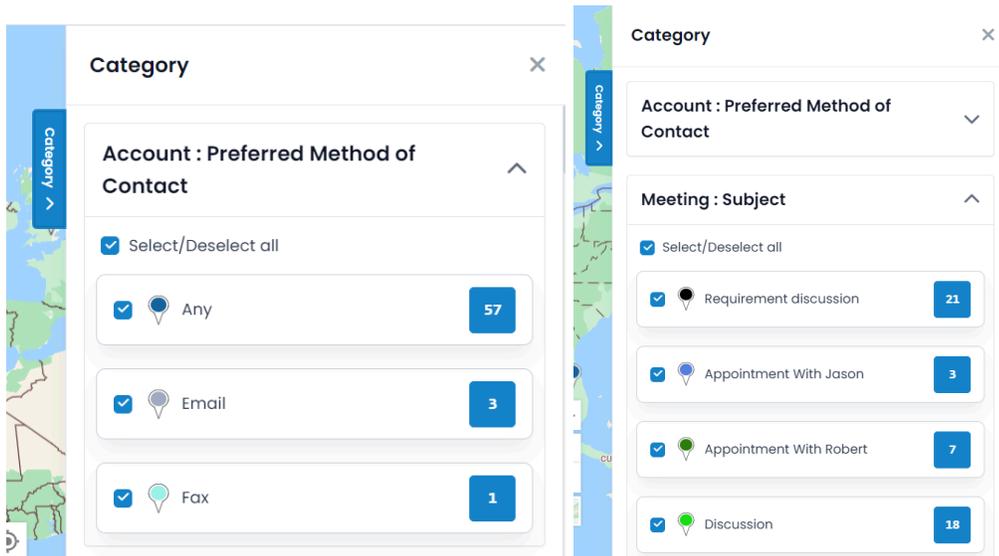
Note: At a time only the single entity records can be assigned to the Marketing List.

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.



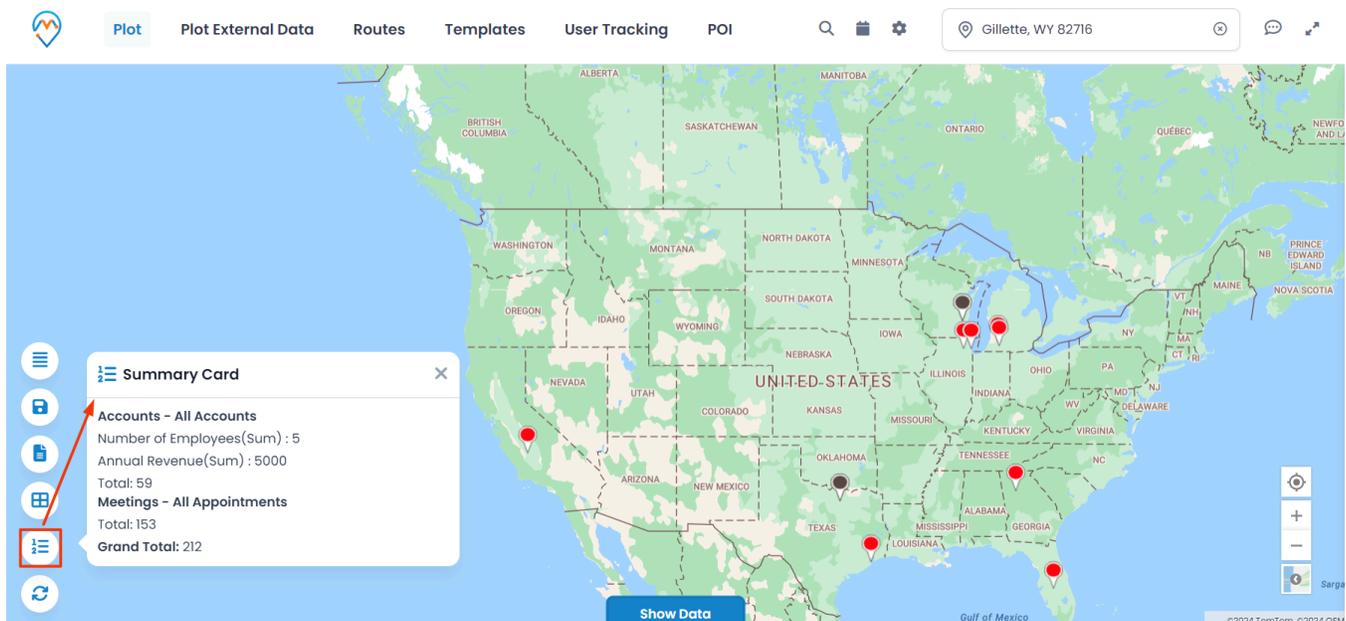
- By clicking on the ‘Search’ button, the data will plot pins as per the selection of attributes. You will get the list of selected categories entity-wise on the right side of the map (Infobox).



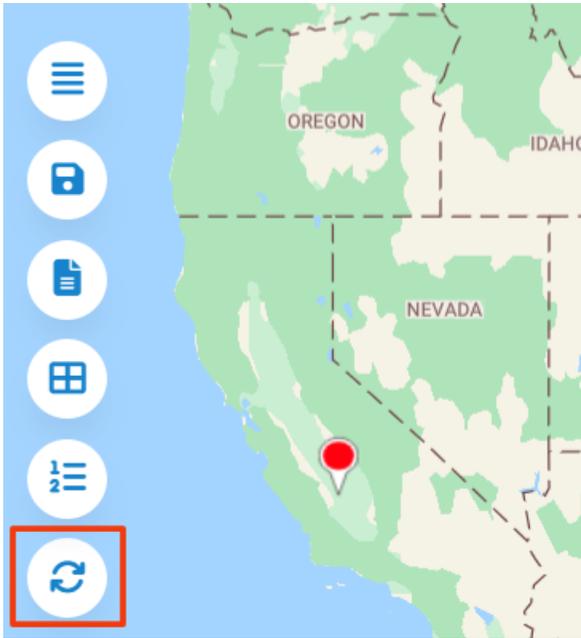
- You will see the categorized records with the number of records.

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.



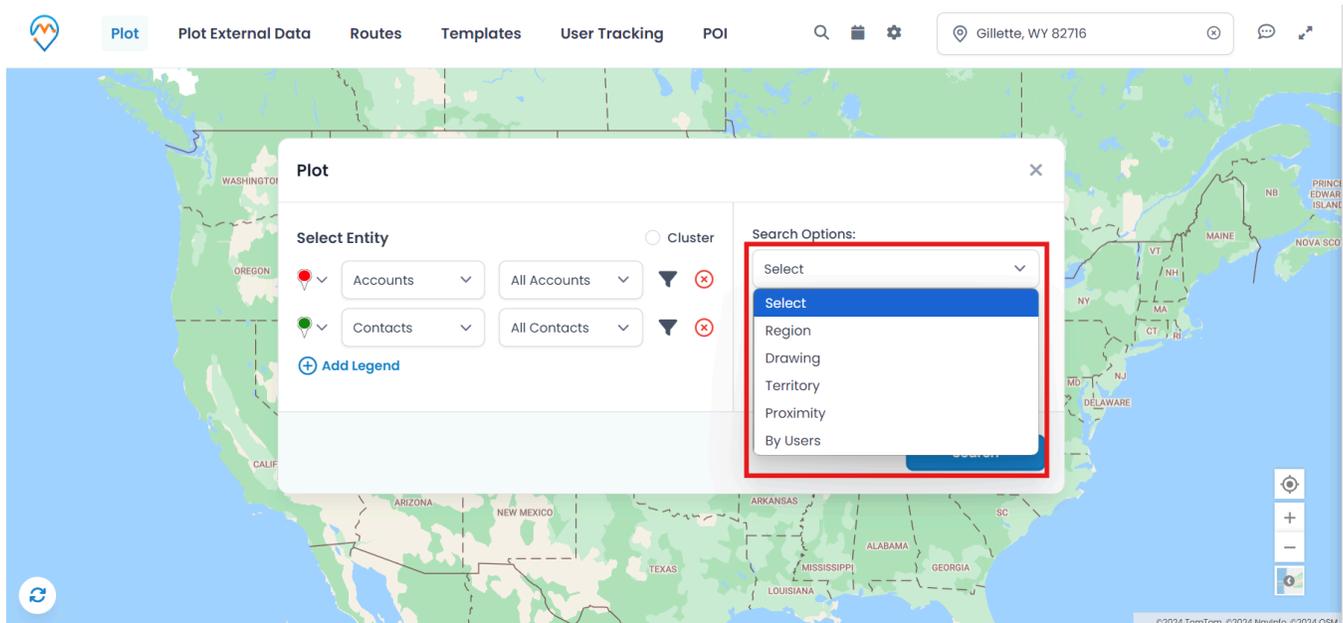
Refresh



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

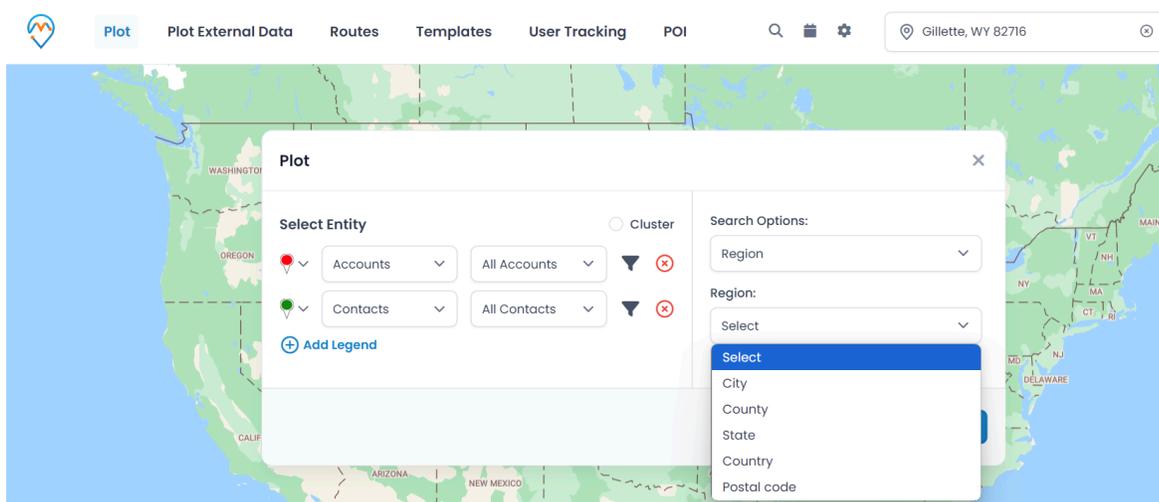
Search Options

- 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:
 - Region
 - Drawing
 - Territory
 - Proximity
 - By User/Teams



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**.



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

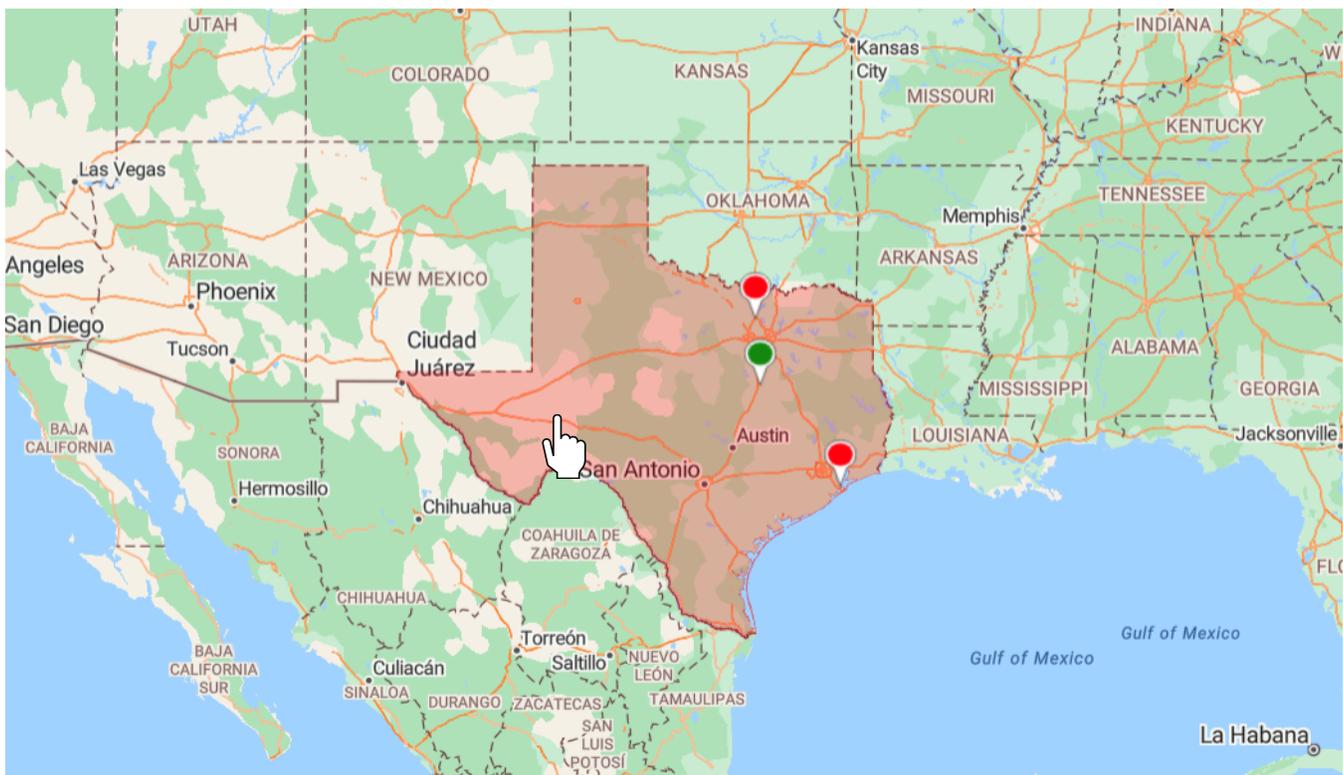
Search Options:

Region:

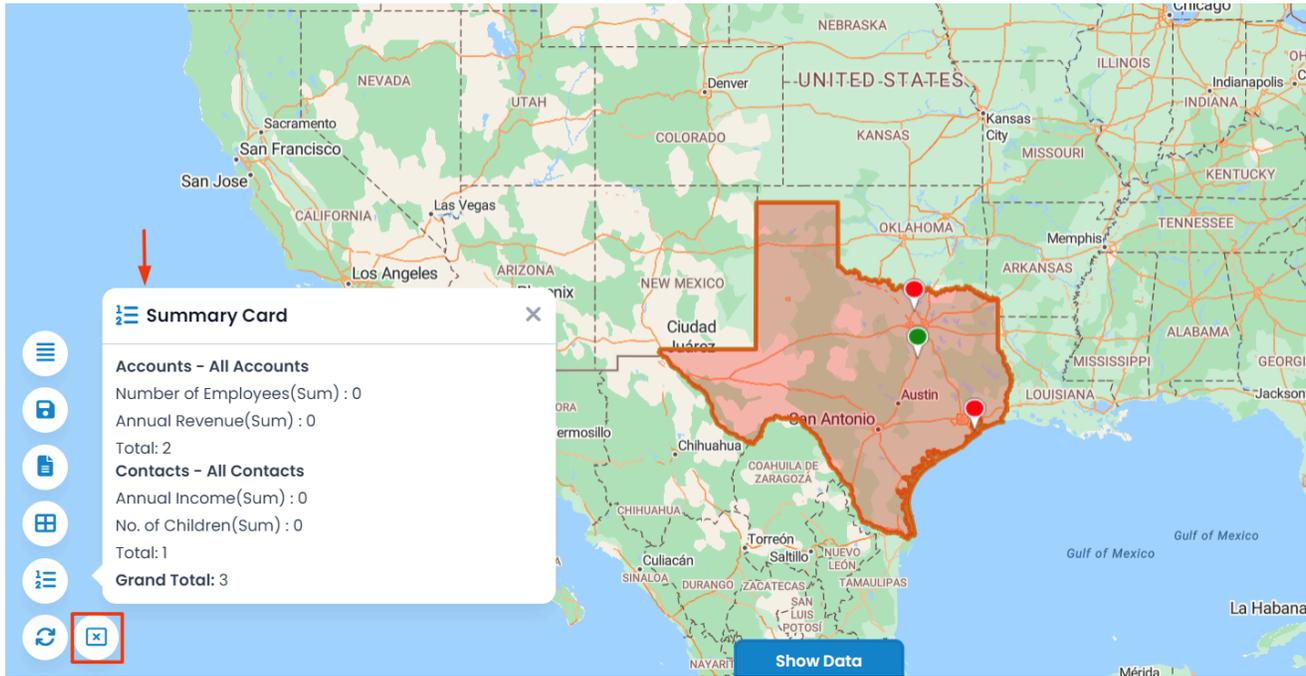
State:*

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.

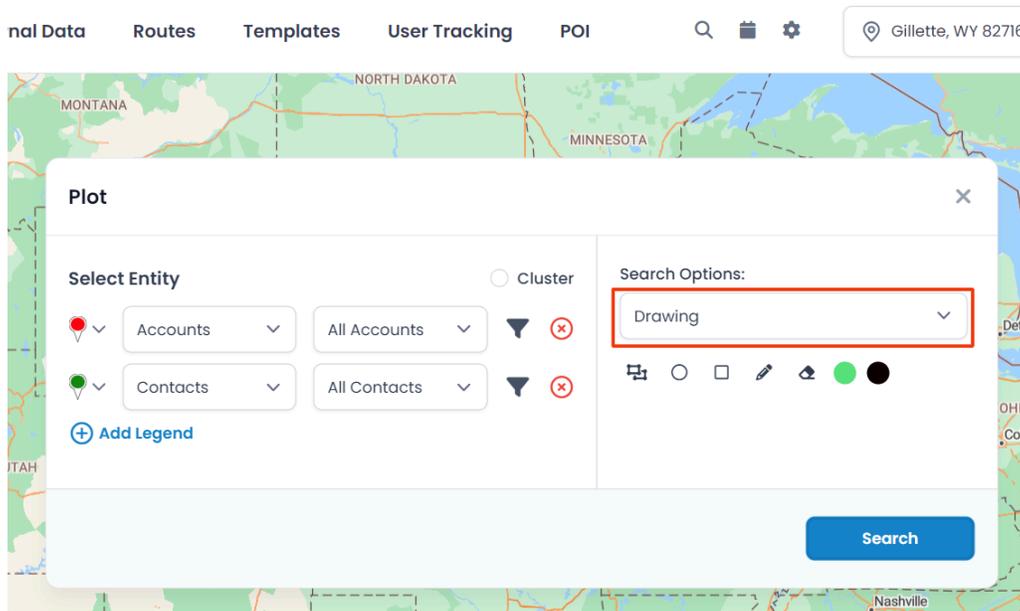


- By clicking on the close **X** icon, the state will deselect.

Note: You can create and manage the Territory from the individual option of the “Territory Management”.

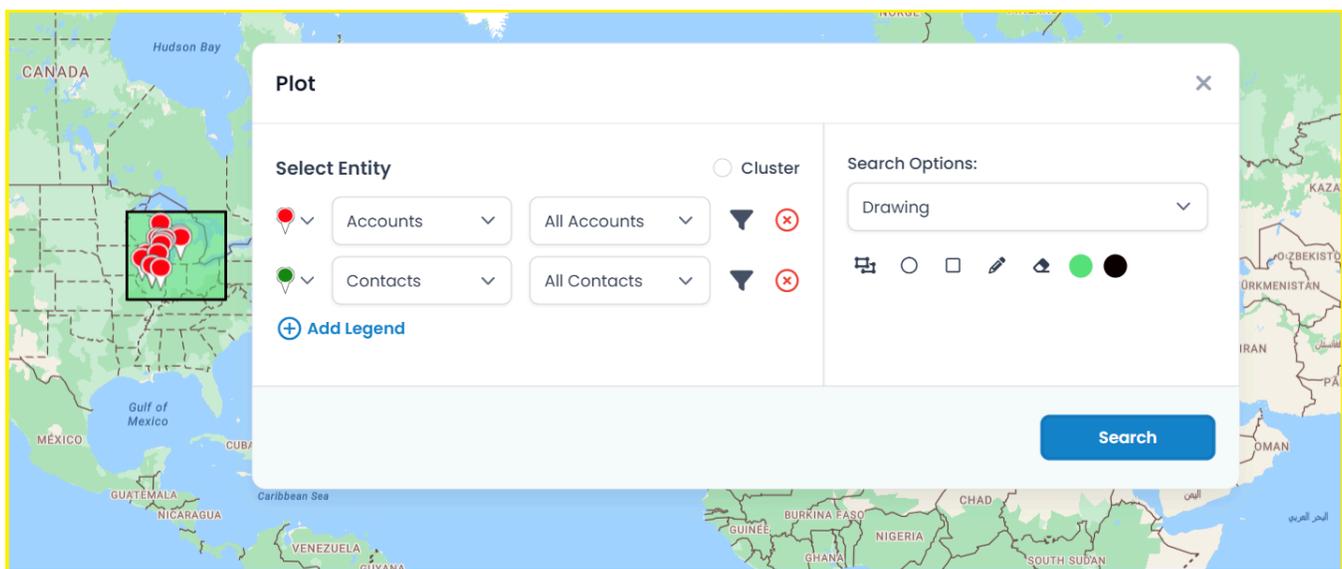
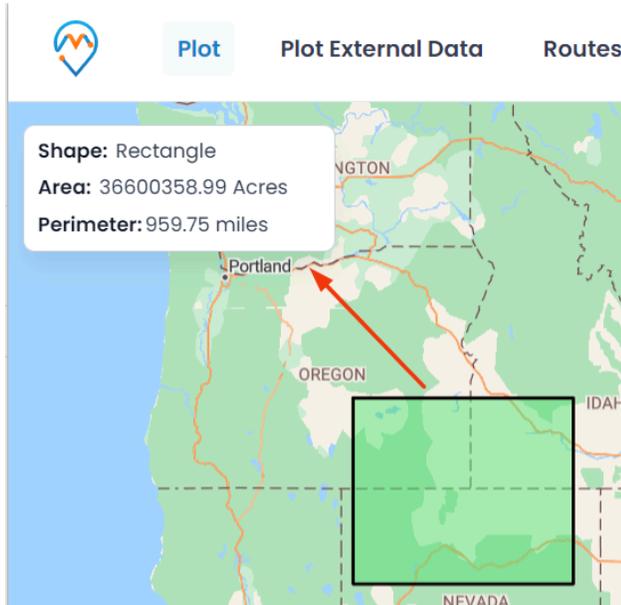
By Drawing

- 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.



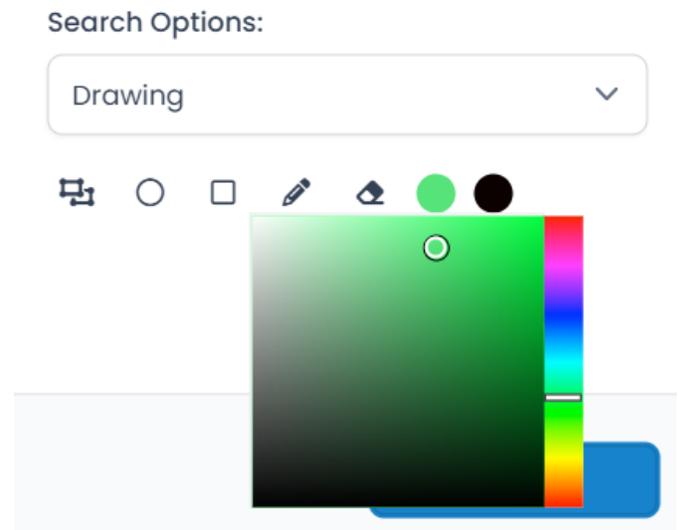
- For free drawing select the ‘Polygon’ shape, just by single clicking on the map drag the mouse cursor the shape will be drawn. You will get the records as per your drawing on the map.

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



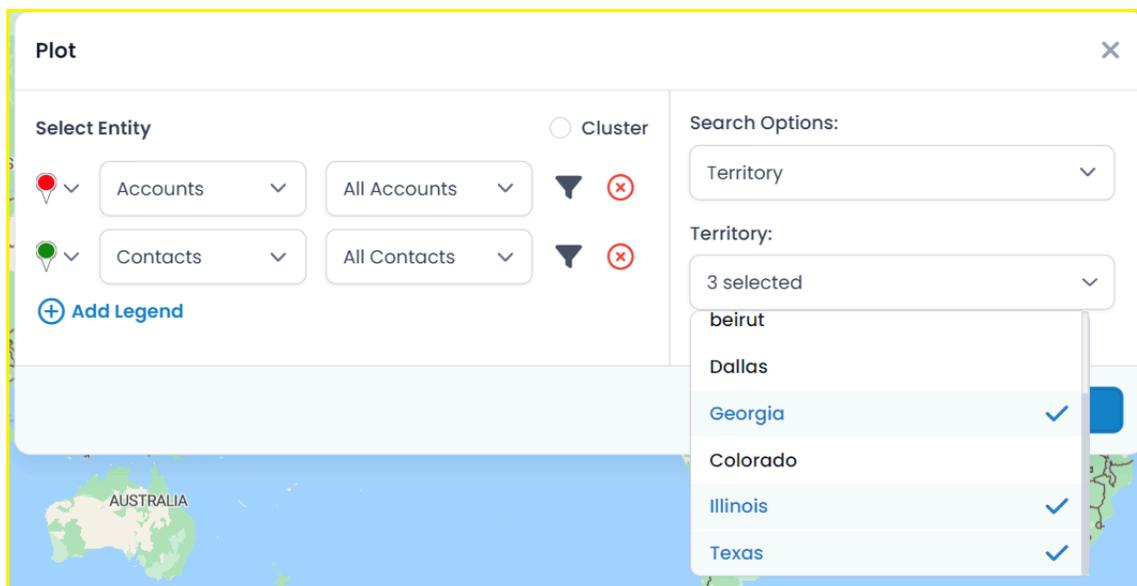
- You can edit the drawn shape by selecting 'Edit'  icon. After selecting Edit icon, you can move the shape and increase/decrease the area of the shape.
- You can remove the drawn shape by selecting "Erase"  icon and then click on the shape.

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.



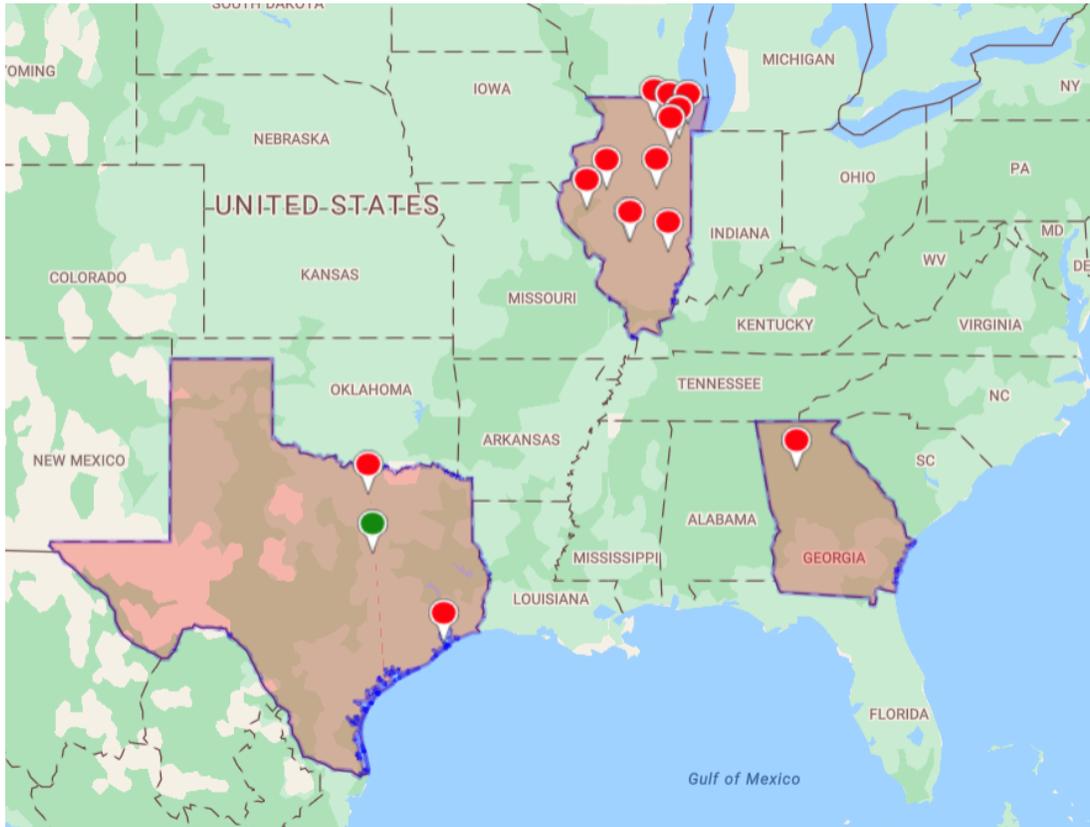
By Territory

- 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**.



- 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.

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



Note: 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 Cluster

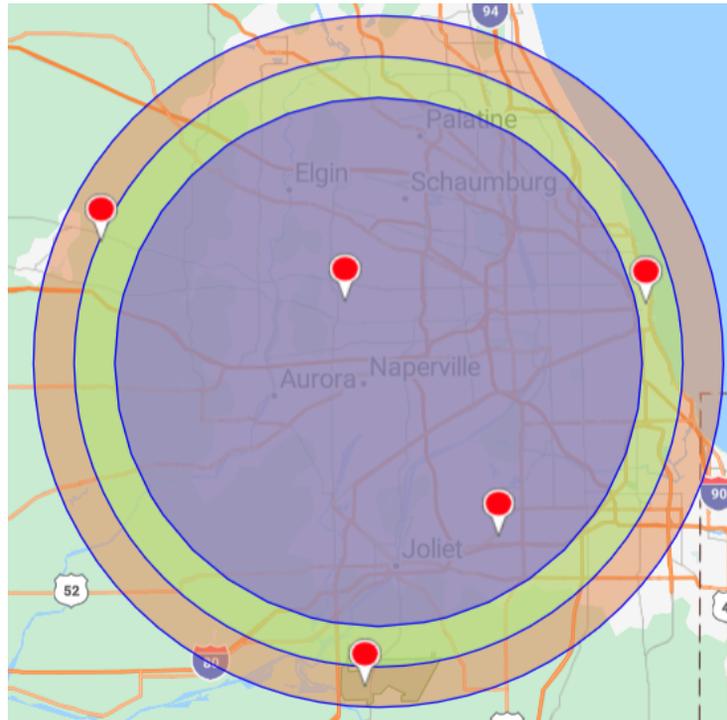
  

[+ Add Legend](#)

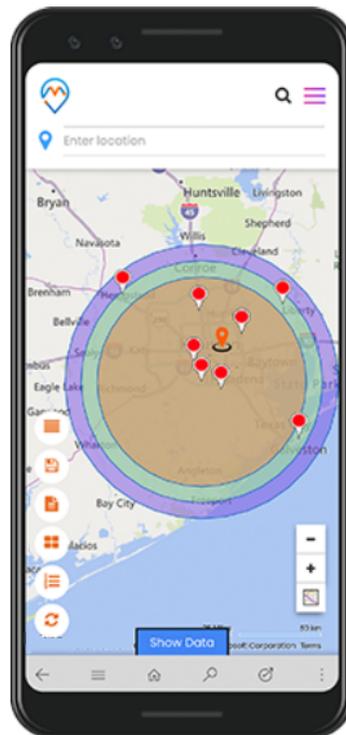
Search Options:

Distance Time

Search

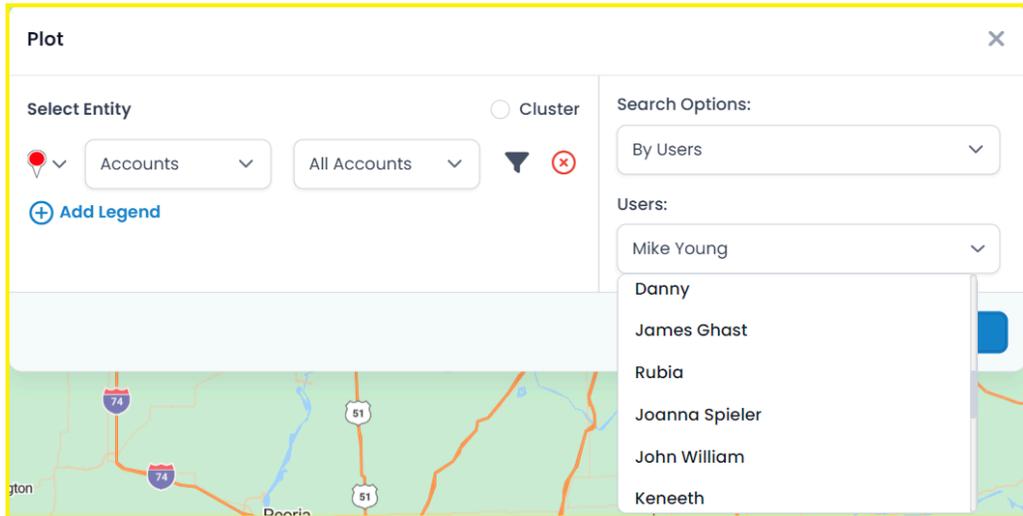


- DynamicsCRM **users** can also search the records using the ‘Proximity Search’ from the mobile or tab.



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.

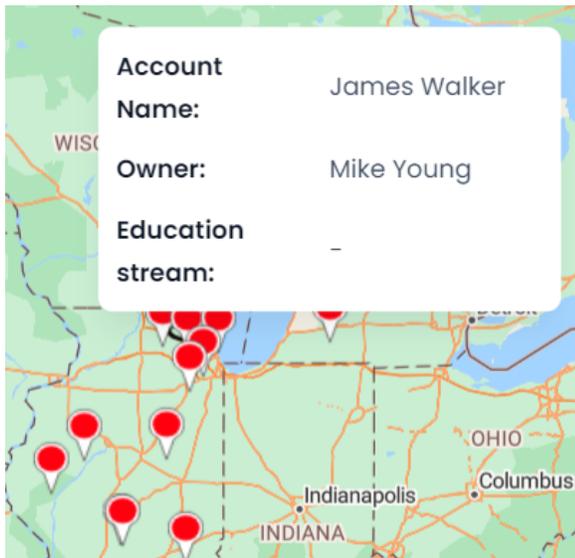


- By clicking on the **Search** button, the records of the selected user will be plotted on the map.

Note: 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.

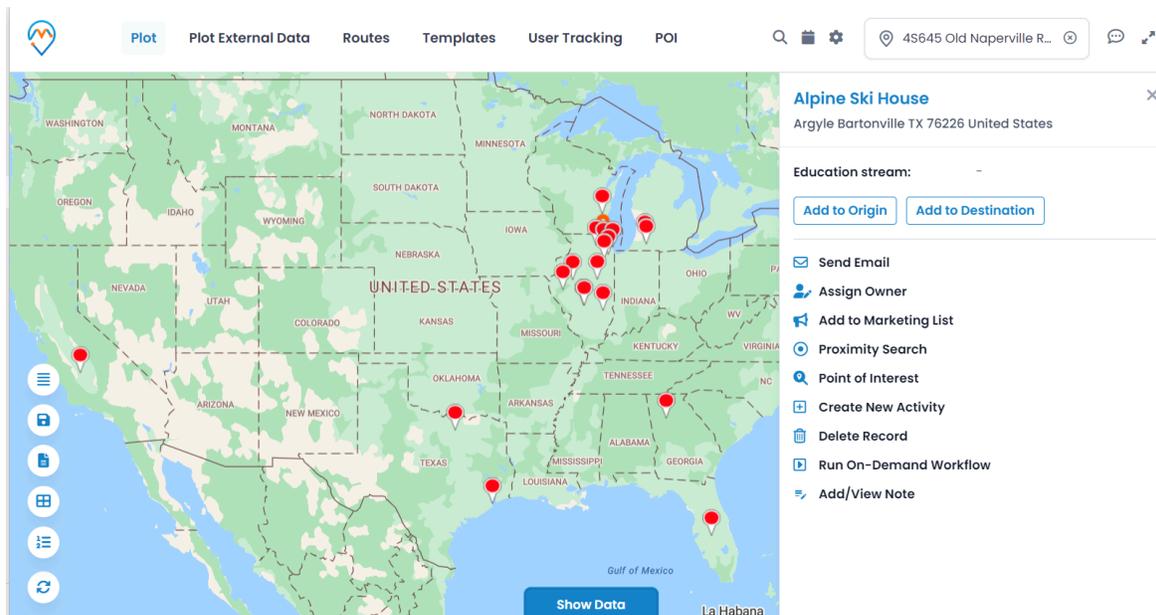


Details on Hover

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  (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

Education stream: -

[Add to Origin](#)

[Add to Destination](#)

- [Send Email](#)
- [Assign Owner](#)
- [Add to Marketing List](#)
- [Proximity Search](#)
- [Point of Interest](#)
- [Create New Activity](#)
- [Delete Record](#)
- [Run On-Demand Workflow](#)
- [Add/View Note](#)

You can **Share & Assign** the selected records by:

- > Sending Email
- > Assigning Owner
- > Add to Marketing List

Alpine Ski House ✕

Argyle Bartonville TX 76226 United States

Education stream: -

-

-  Send Email
-  Assign Owner
-  Add to Marketing List

-  Proximity Search
-  Point of Interest
-  Create New Activity
-  Delete Record
-  Run On-Demand Workflow
-  Add/View Note

Note: 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** configuration.

Other Actions:

- > Proximity Search
- > Point of Interest
- > Create New Activity
- > Delete Record
- > Run On-Demand Workflow
- > Add /View Note

Alpine Ski House ✕

Argyle Bartonville TX 76226 United States

Education stream: -

-

-  Send Email
-  Assign Owner
-  Add to Marketing List
-  Proximity Search
-  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 card 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 ×

Argyle Bartonville TX 76226 United States

Education stream: -

Add to Origin

Add to Destination

✉ Send Email

👤 Assign Owner

📌 Add to Marketing List

📍 Proximity Search

📍 Point of Interest

➕ Create New Activity

🗑 Delete Record

▶ Run On-Demand Workflow

⇒ Add/View Note

📍 Proximity Search

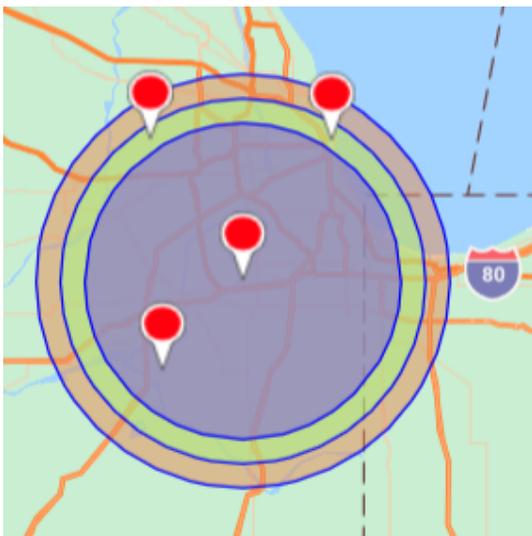
Distance Time

75

85

95

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. 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

POI Location:

Cook IL 60467 United States

POI Radius:

10













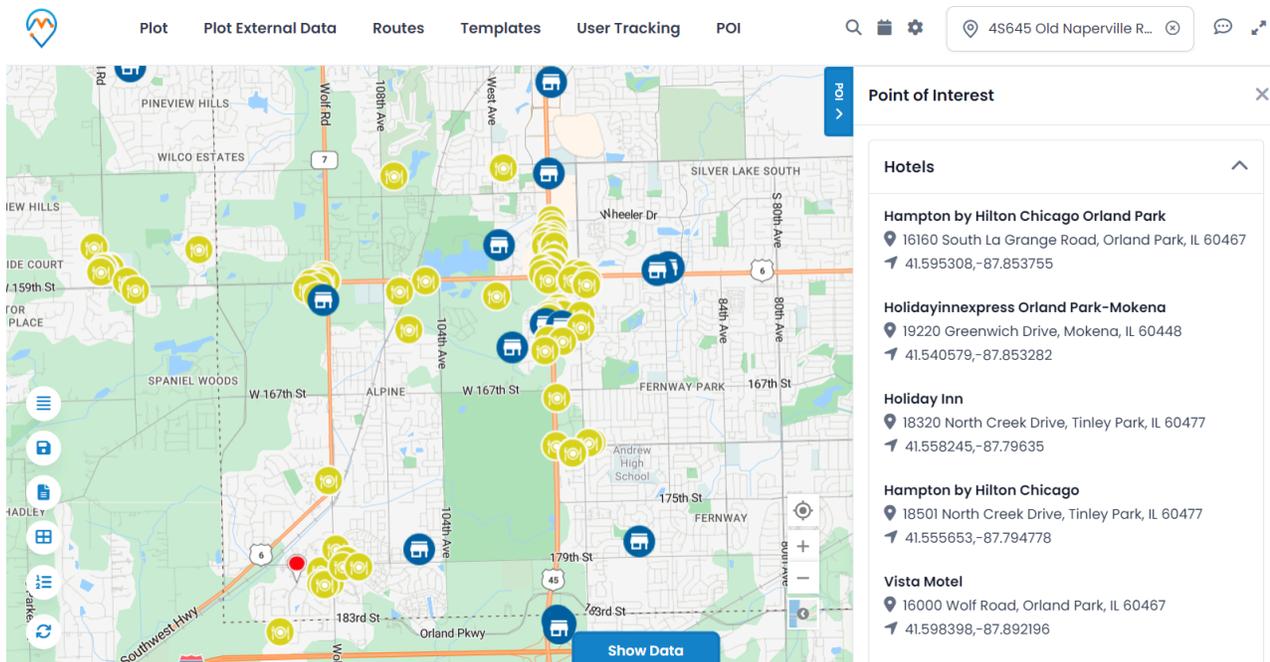


Go

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.

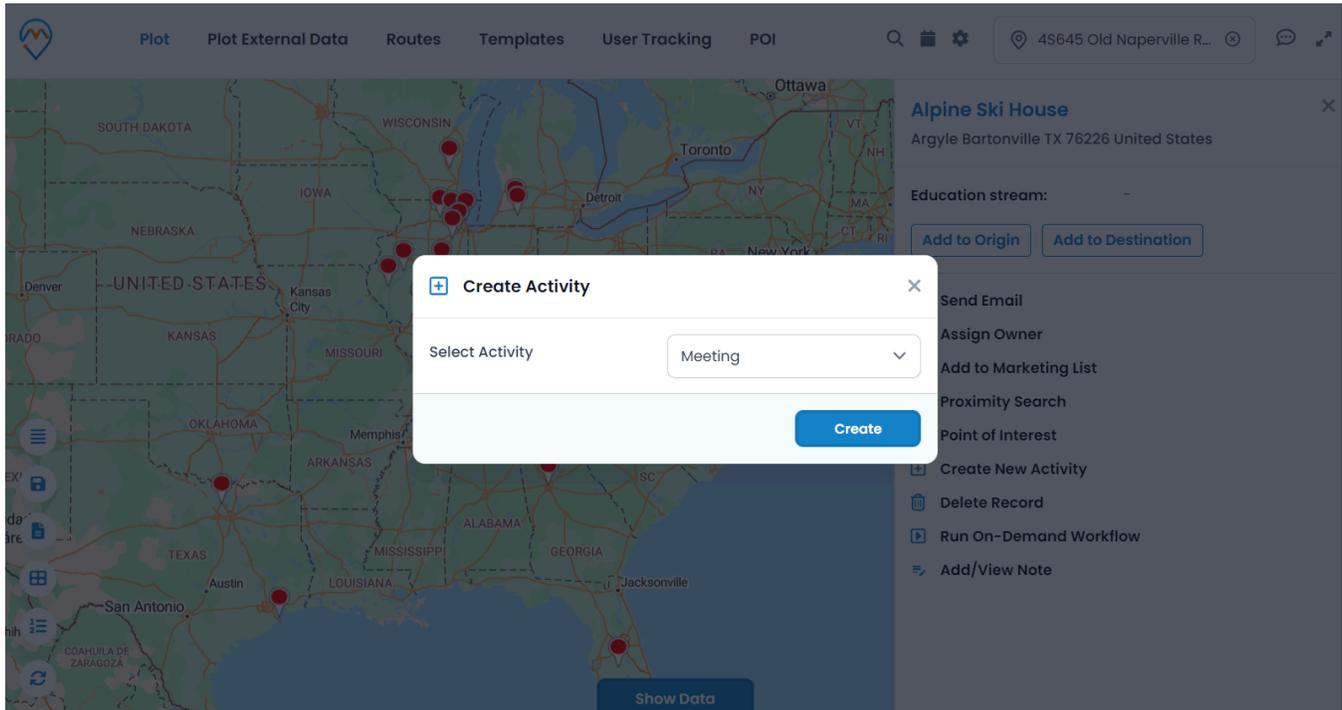


The screenshot shows the app's main interface. At the top, there are navigation tabs: Plot, Plot External Data, Routes, Templates, User Tracking, and POI. A search bar at the top right contains the address "45645 Old Naperville R...". Below the search bar is a map of a residential area with several yellow and blue POI markers plotted. A "Show Data" button is visible at the bottom of the map. On the right side, a "Point of Interest" panel is open, displaying a list of nearby hotels:

- Hotels**
 - Hampton by Hilton Chicago Orland Park**
16160 South La Grange Road, Orland Park, IL 60467
41.595308, -87.853755
 - Holidayinnexpress Orland Park-Mokena**
19220 Greenwich Drive, Mokena, IL 60448
41.540579, -87.853282
 - Holiday Inn**
18320 North Creek Drive, Tinley Park, IL 60477
41.558245, -87.79635
 - Hampton by Hilton Chicago**
18501 North Creek Drive, Tinley Park, IL 60477
41.555653, -87.794778
 - Vista Motel**
16000 Wolf Road, Orland Park, IL 60467
41.598398, -87.892196

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.



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

Quick Create: Meeting ✕

Owner * MY Mike Young ✕ 🔍

Required Attendees --- 🔍

Optional Attendees --- 🔍

Subject * ---

Location ---

Teams meeting No

APPOINTMENT DETAILS

Start Time * 10/23/2024 📅
12:00 PM ⌵

End Time * 10/23/2024 📅
12:30 PM ⌵

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

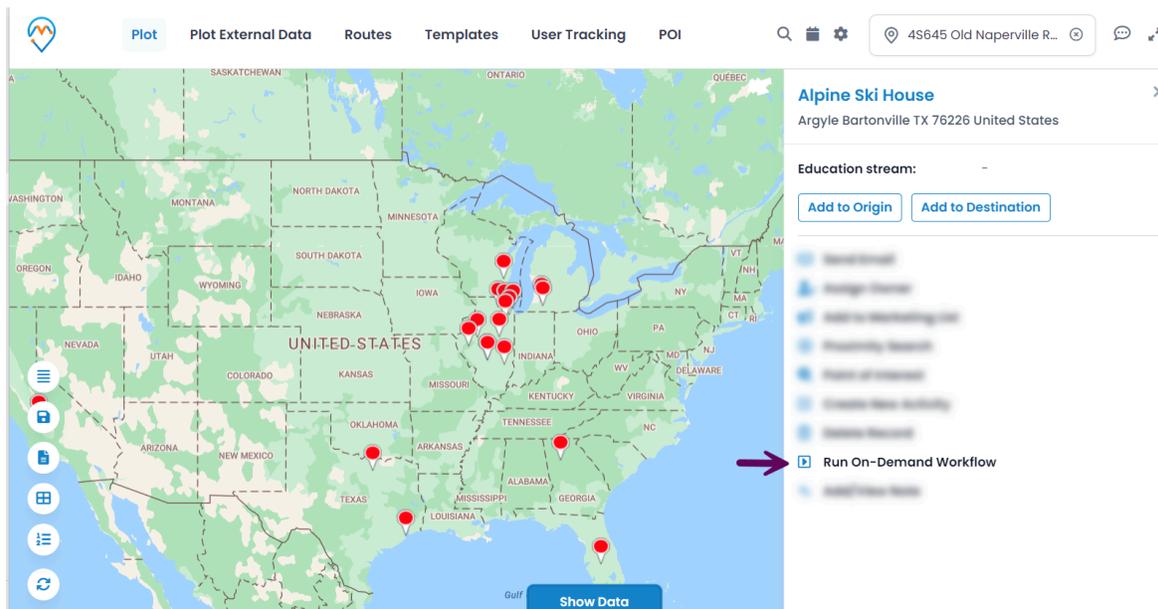
- By clicking on the delete button, the selected record from the map gets deleted from the CRM.

- ✉ Send Email
- 👤 Assign Owner
- 📣 Add to Marketing List
- 📍 Proximity Search
- 🔍 Point of Interest
- ➕ Create New Activity
- 🗑 Delete Record 
- ▶ Run On-Demand Workflow
- 📝 Add/View Note

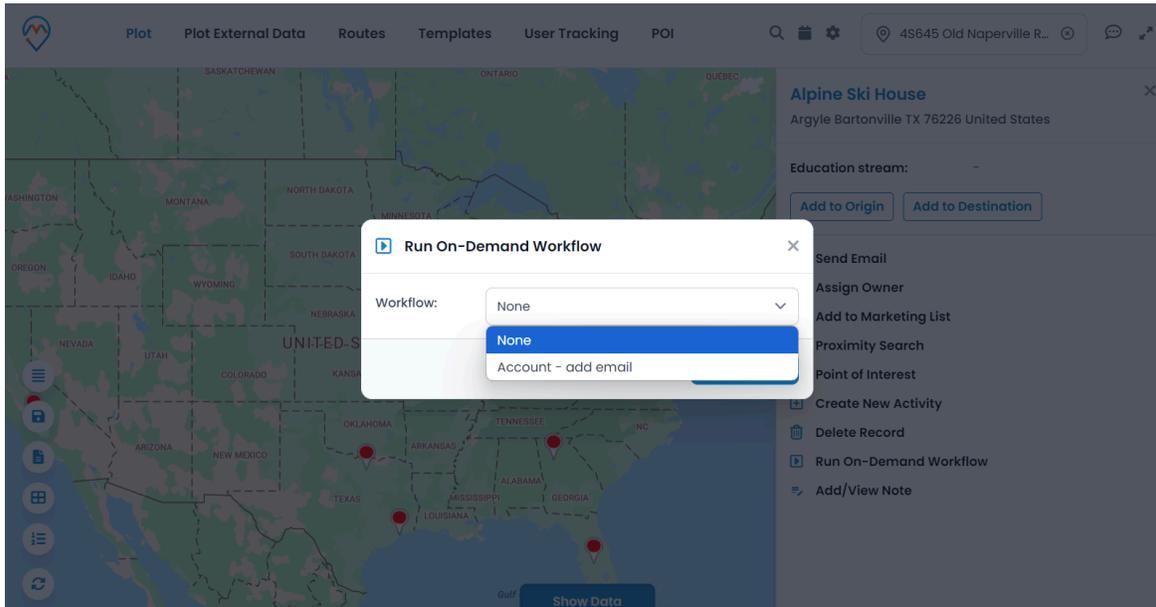
Run On-Demand Workflow

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.



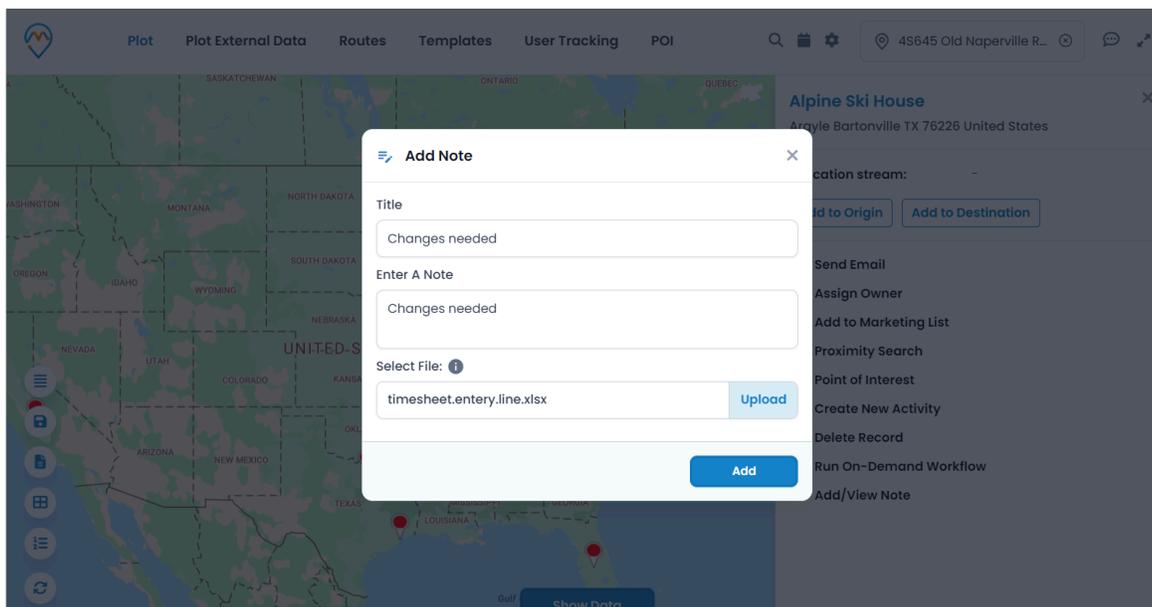
A pop-up would display where you need to select the workflow and click on Execute.



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.

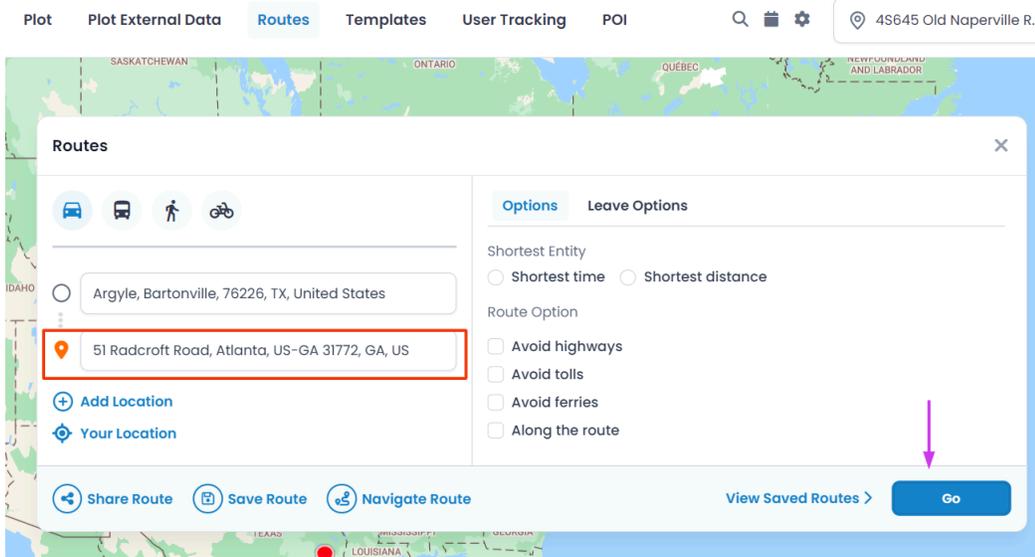


- Once you add the note, it will be displayed below the form. From the saved note, you can download the files attached to the respective notes by clicking on it.

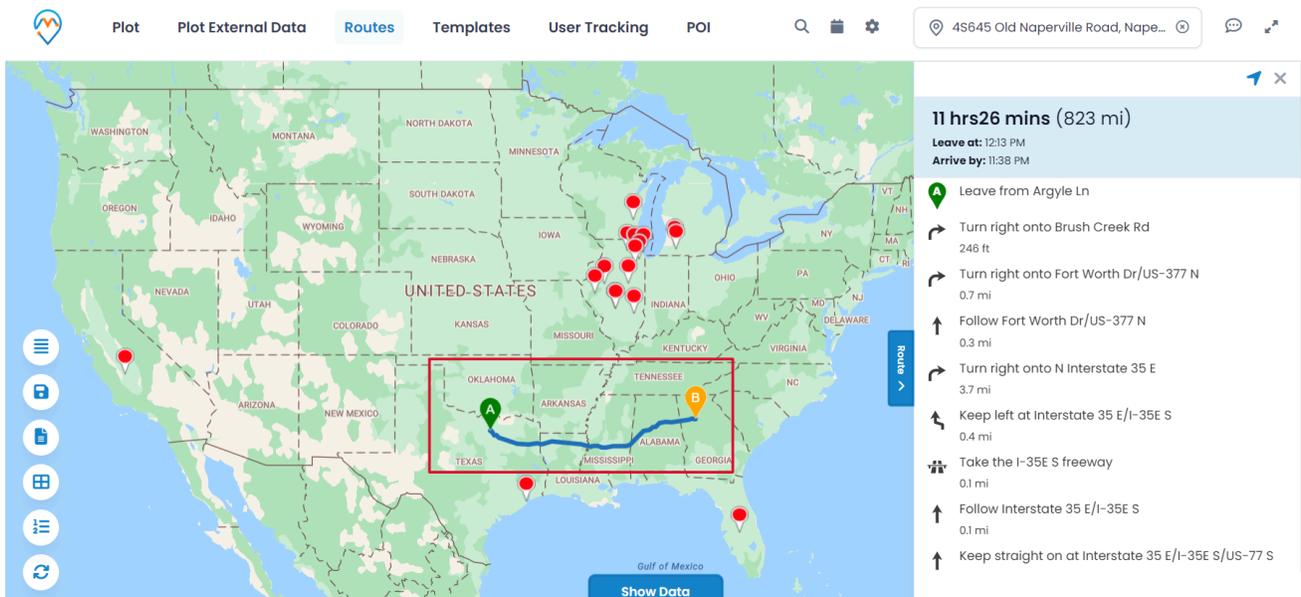


By clicking on the **Add to Destination** option of the other records, the address of that record will be added as destination point of route under **Directions** tab.

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



- 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

 Send Email

 Assign Owner

 Add to Marketing List

From the Share & Assign, you can 'Send Email' to the selected record.

By clicking on that action button, it would prompt user to select an email 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 ▼



Note: 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

 Send Email

 Assign Owner

 Add to Marketing List

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 ▼

Note: 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.

 Send Email

 Assign Owner

 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

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

Note: 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.

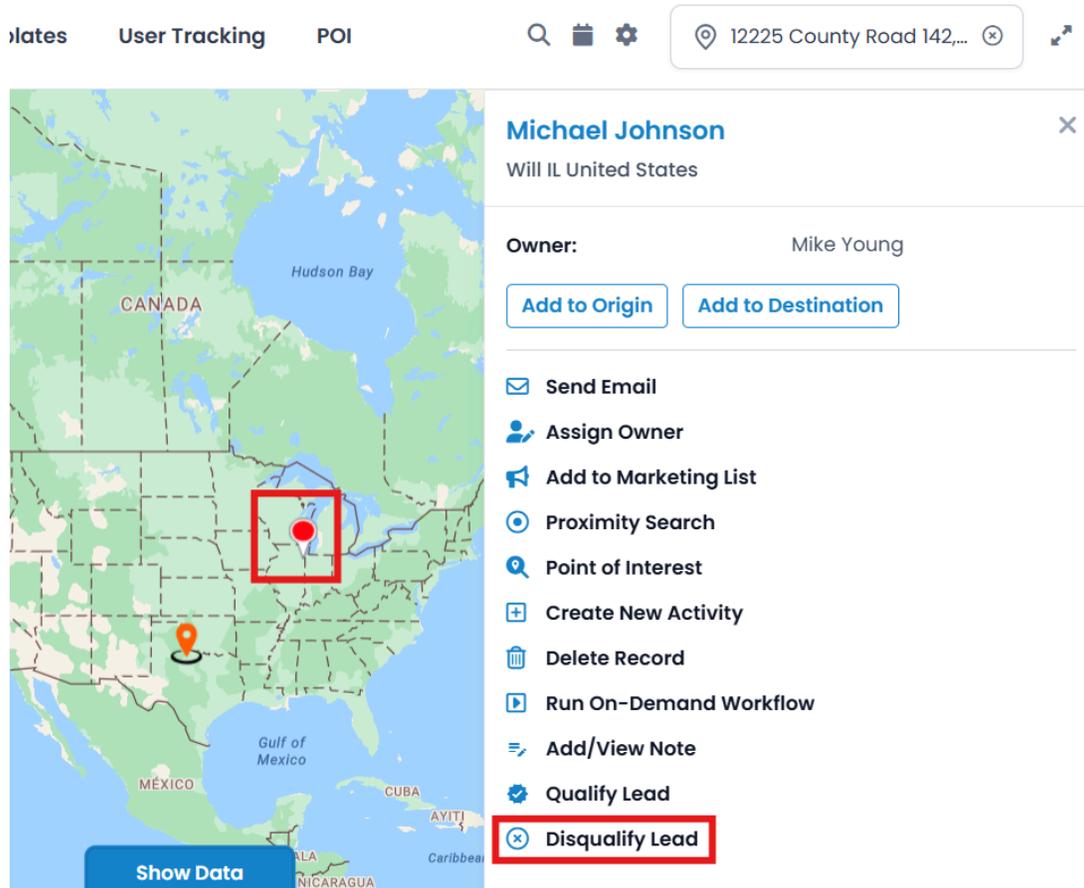


The screenshot displays the Appjetty interface. At the top, there are navigation tabs for 'States', 'User Tracking', and 'POI'. A search bar contains the address '12225 County Road 142,...'. Below the search bar, a map of the United States is shown with a red dot in the Midwest region, which is highlighted by a red square. To the right of the map, a lead profile for 'Michael Johnson' is visible, with the address 'Will IL United States' and the owner 'Mike Young'. Below the profile, there are two buttons: 'Add to Origin' and 'Add to Destination'. A list of actions is displayed on the right, including 'Send Email', 'Assign Owner', 'Add to Marketing List', 'Proximity Search', 'Point of Interest', 'Create New Activity', 'Delete Record', 'Run On-Demand Workflow', 'Add/View Note', 'Qualify Lead', and 'Disqualify Lead'. The 'Qualify Lead' option is highlighted with a red box.

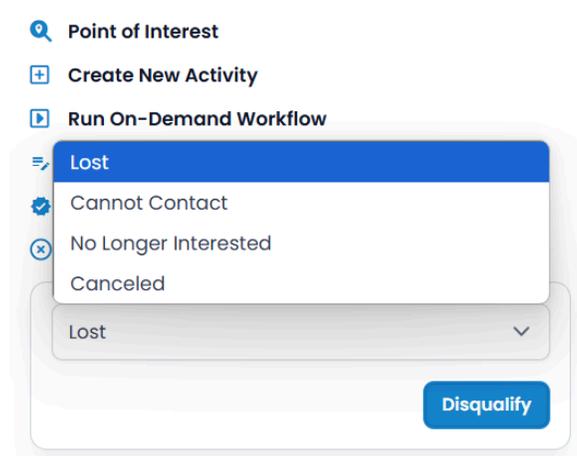
Note: Open leads will display option to qualify/disqualify leads. Once leads are qualified, those leads will be shown in Closed Leads view.

Disqualify Lead

- By clicking on “Disqualify Lead” icon, leads will get disqualified and its status will be changed to close.



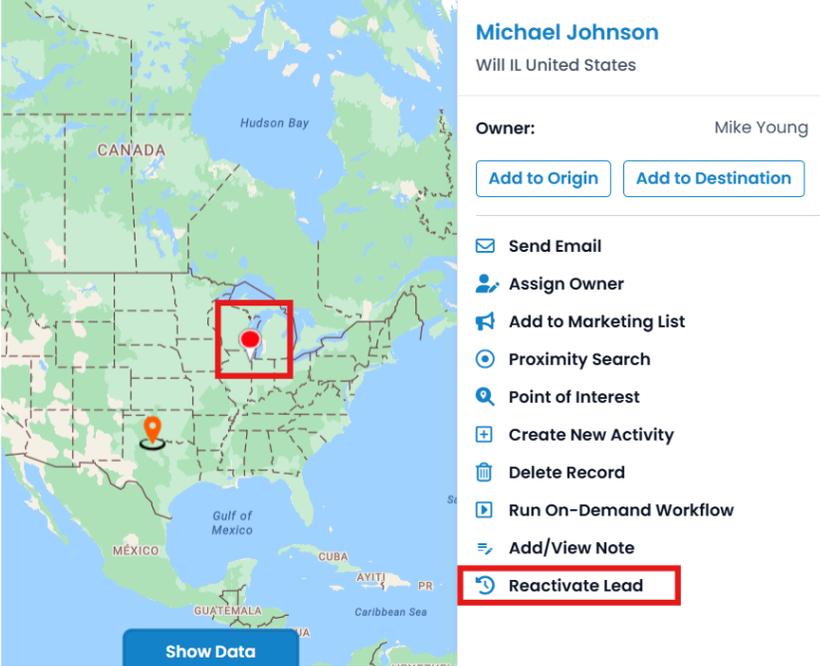
- Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Canceled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.



- 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
Will IL United States

Owner: Mike Young

[Add to Origin](#) [Add to Destination](#)

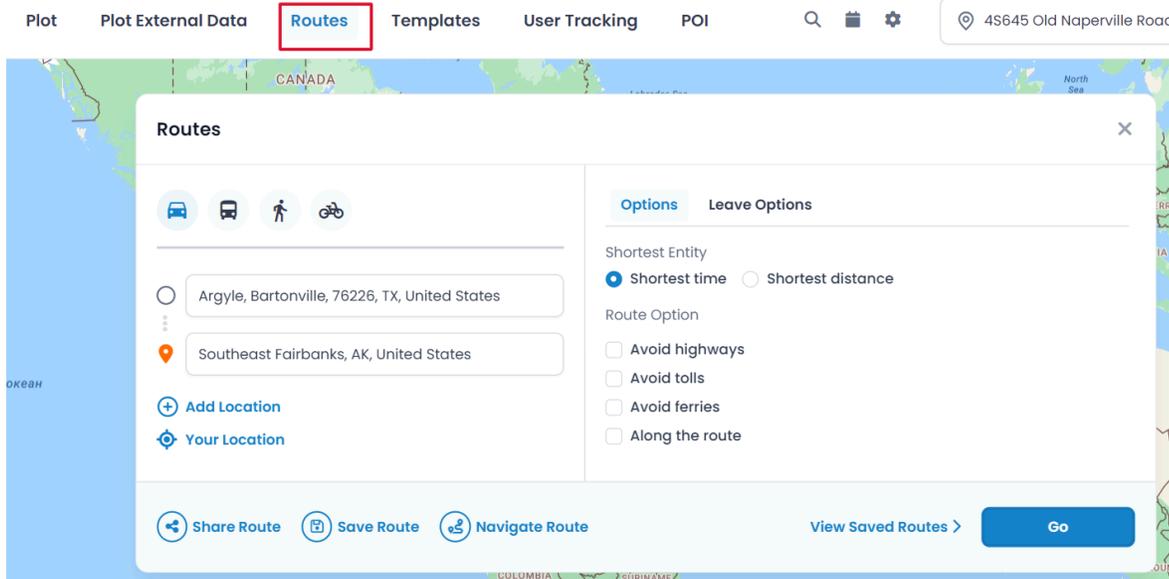
-  Send Email
-  Assign Owner
-  Add to Marketing List
-  Proximity Search
-  Point of Interest
-  Create New Activity
-  Delete Record
-  Run On-Demand Workflow
-  Add/View Note
-  **Reactivate Lead**

[Show Data](#)

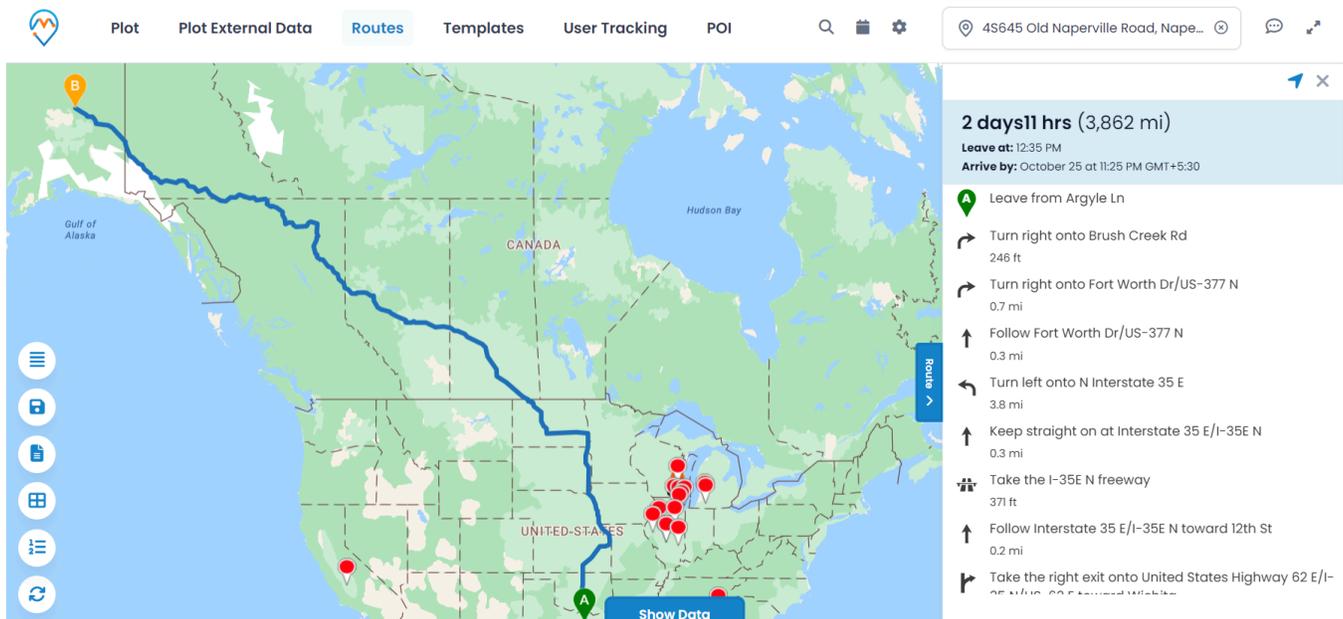
Note: On reactivating lead, view of lead will get updated from closed leads to open leads.

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.



- 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.

Routes ✕

Car Bus Walk Bike

Argyle, Bartonville, 76226, TX, United States
 ⋮
 Southeast Fairbanks, AK, United States

 Your Location

Options Leave Options

Shortest Entity

Shortest time Shortest distance

Route Option

Avoid highways
 Avoid tolls
 Avoid ferries
 Along the route

[View Saved Routes >](#)

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 ✕

Car Bus Walk Bike

Argyle, Bartonville, 76226, TX, United States ✕
 ⋮
 Southeast Fairbanks, AK, United States ✕
 ⋮
 South Dakota, Laredo, TX 78041 ✕
 ⋮
 Missouri City, TX ✕

 Your Location

Options Leave Options

Shortest Entity

Shortest time Shortest distance

Route Option

Avoid highways
 Avoid tolls
 Avoid ferries
 Along the route

[View Saved Routes >](#)

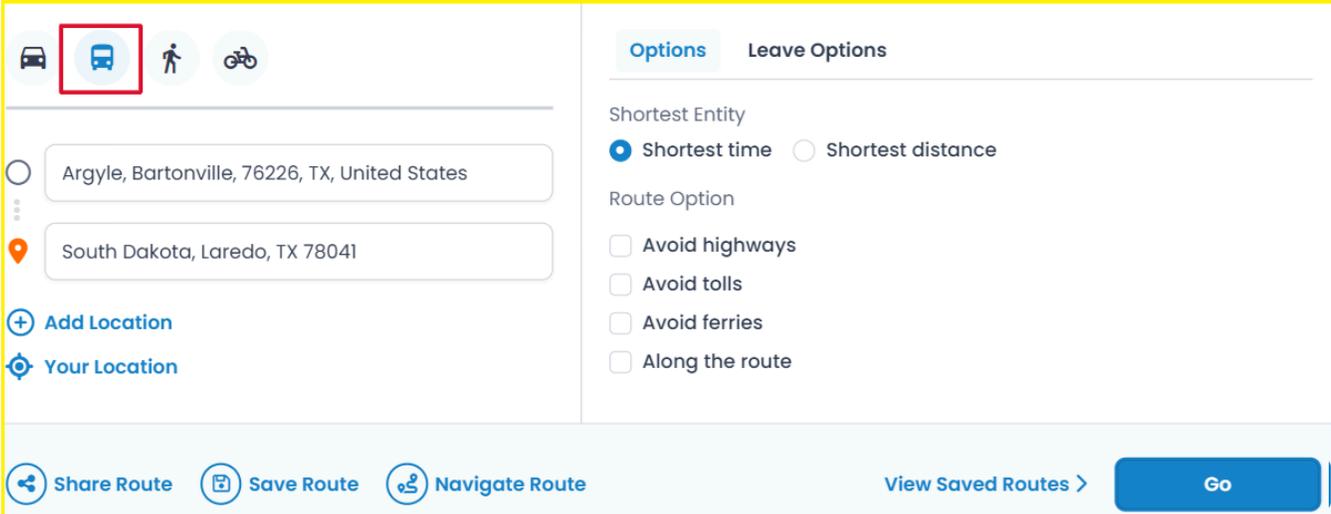


Argyle, Bartonville, 76226, TX, United States
 Southeast Fairbanks, AK, United States
 South Dakota, Laredo, TX 78041
 Missouri City, TX

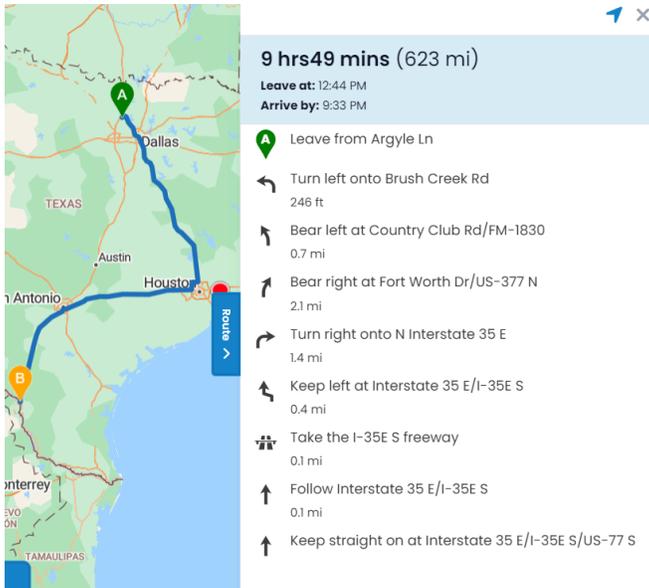
For all the waypoints added in the route, each way point can be dragged to reorder their position in the route.

After reordering the route, it will immediately reflect on the map also.

- 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**.



The screenshot shows the appjetty routing interface. At the top left, there are four transport mode icons: a car, a bus (highlighted with a red box), a person walking, and a bicycle. Below these are two input fields for origin and destination. The origin is "Argyle, Bartonville, 76226, TX, United States" and the destination is "South Dakota, Laredo, TX 78041". There are also buttons for "Add Location" and "Your Location". On the right side, there are "Options" and "Leave Options" tabs. Under "Options", there are radio buttons for "Shortest time" (selected) and "Shortest distance". Under "Route Option", there are checkboxes for "Avoid highways", "Avoid tolls", "Avoid ferries", and "Along the route". At the bottom, there are buttons for "Share Route", "Save Route", "Navigate Route", "View Saved Routes >", and a blue "Go" button.

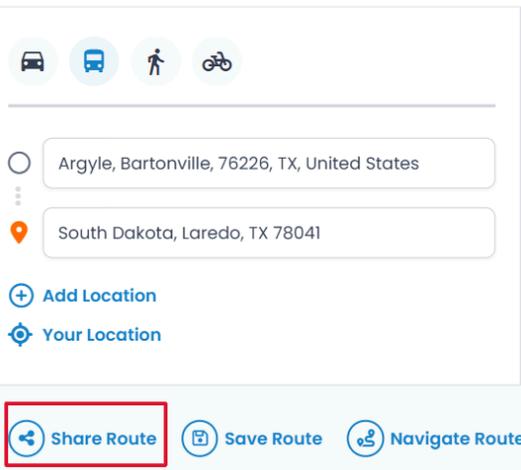


The screenshot shows a map with a blue route highlighted. The route starts at point A (Argyle, TX) and ends at point B (Houston, TX). To the right of the map is a list of directions. The total time is 9 hrs 49 mins (623 mi). The departure time is 12:44 PM and the arrival time is 9:33 PM. The directions are as follows:

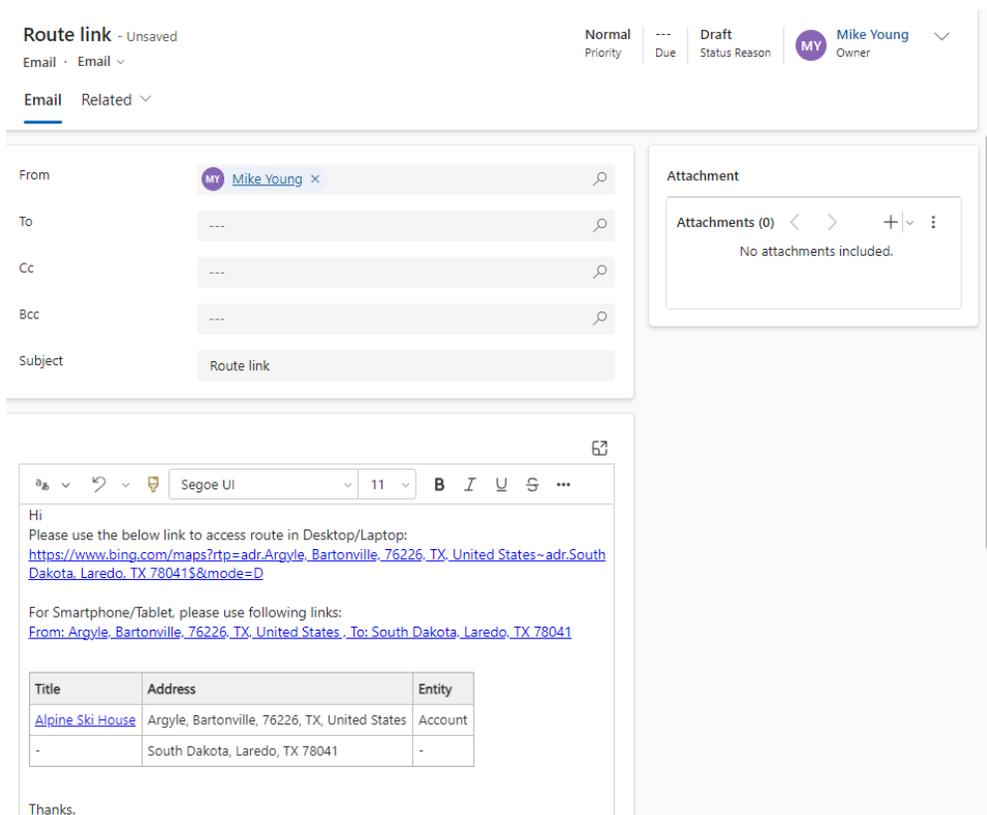
- Leave from Argyle Ln
- Turn left onto Brush Creek Rd (246 ft)
- Bear left at Country Club Rd/FM-1830 (0.7 mi)
- Bear right at Fort Worth Dr/US-377 N (2.1 mi)
- Turn right onto N Interstate 35 E (1.4 mi)
- Keep left at Interstate 35 E/I-35E S (0.4 mi)
- Take the I-35E S freeway (0.1 mi)
- Follow Interstate 35 E/I-35E S (0.1 mi)
- Keep straight on at Interstate 35 E/I-35E S/US-77 S

Share Route

Routes



- 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

Normal Priority | --- Due | Draft Status Reason | MY Mike Young Owner

Email · Email

Email Related

From: MY Mike Young

To: ---

Cc: ---

Bcc: ---

Subject: Route link

Attachment: Attachments (0) | No attachments included.

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
Alpine Ski House	Argyle, Bartonville, 76226, TX, United States	Account
-	South Dakota, Laredo, TX 78041	-

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](https://www.bing.com/maps?rtp=adr.Argyle,Bartonville,76226,TX,United%20States-adr.South%20Dakota,Laredo,TX78041&mode=D)

For Smartphone/Tablet, please use following links:

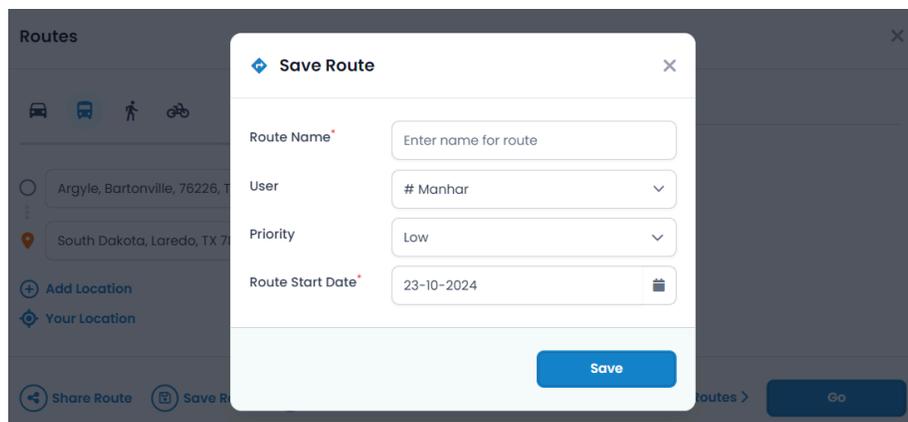
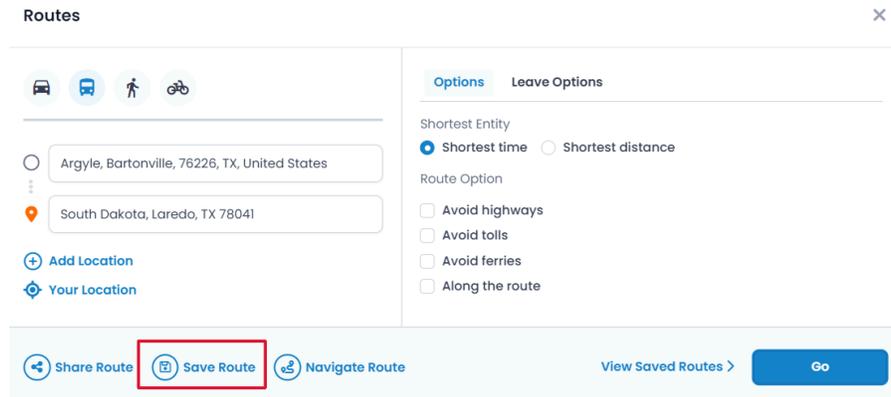
[From: Argyle, Bartonville, 76226, TX, United States, , To: South Dakota, Laredo, TX 78041](#)

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

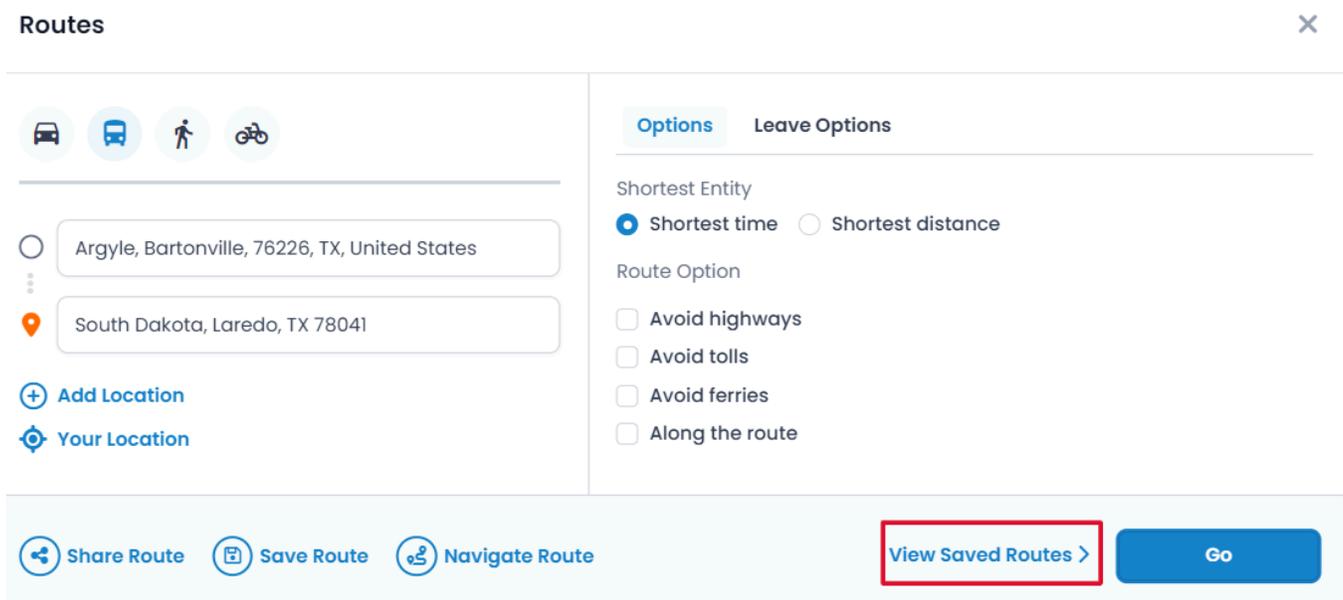
Thanks.

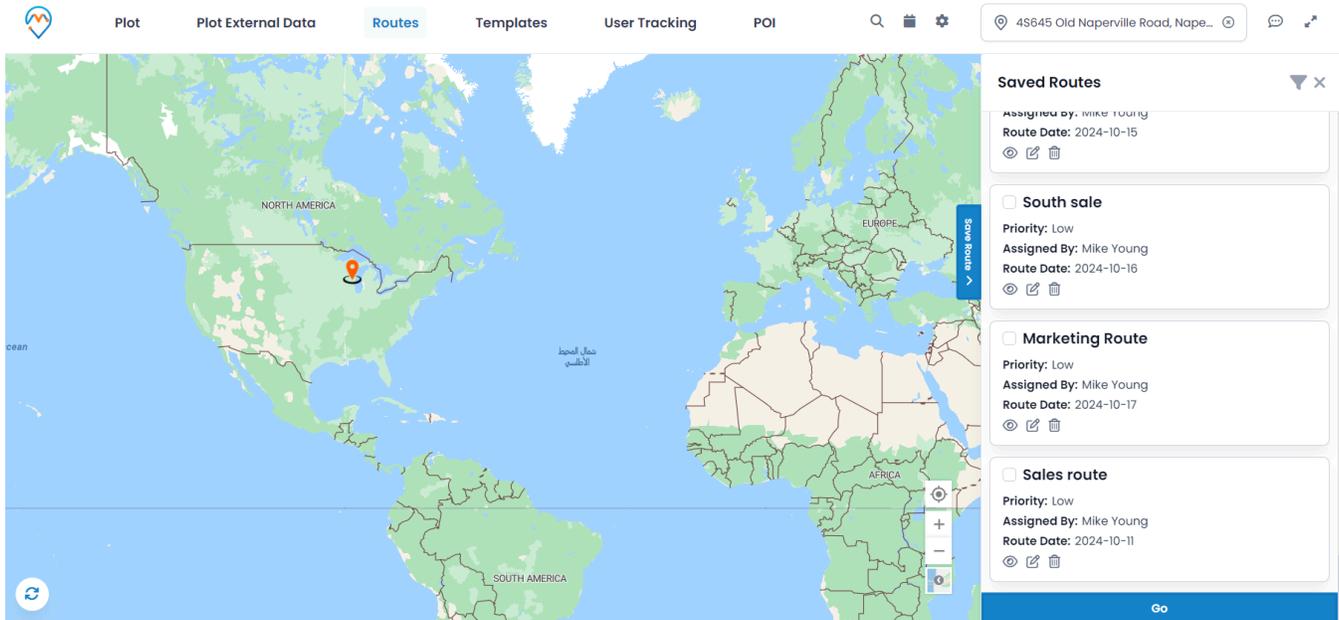
Save Route

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

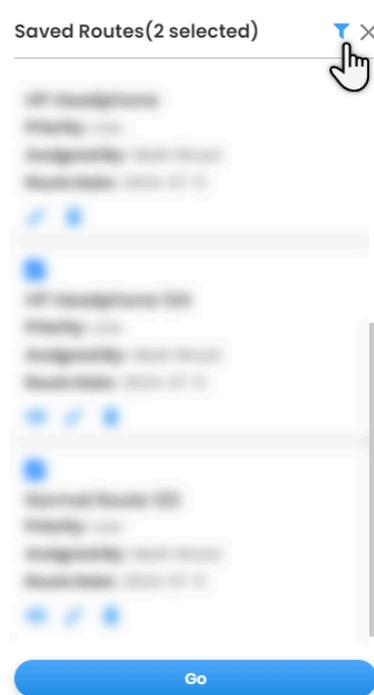


- By clicking on Save  icon, it opens a dialog box where you need to provide a name to the route and user/team name to whom the route is being assigned.
- Along with this, you can also define route date and priority. Priority can be set from Low, Normal and High.
- By clicking on the **Save** button,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

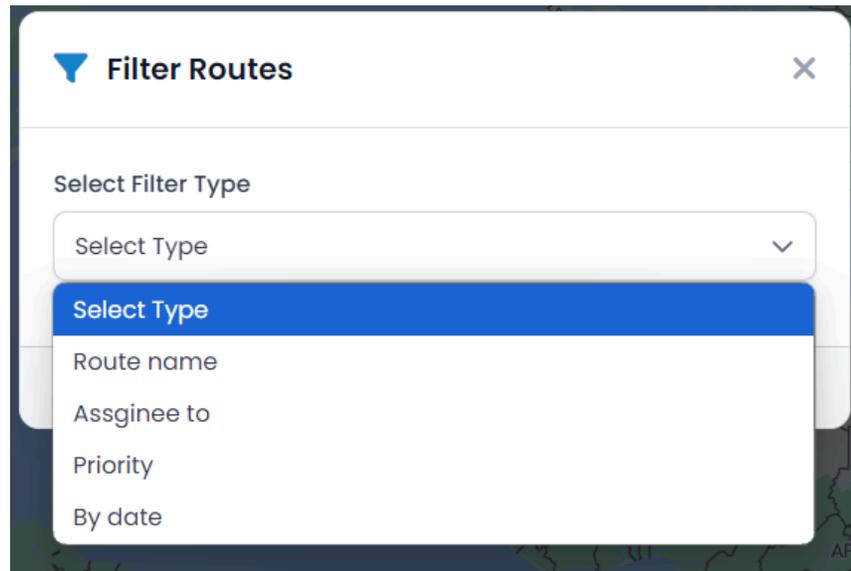




- You can preview the routes and delete any if it is not required. Routes can also be filtered based on Start date and End date by clicking on this  icon

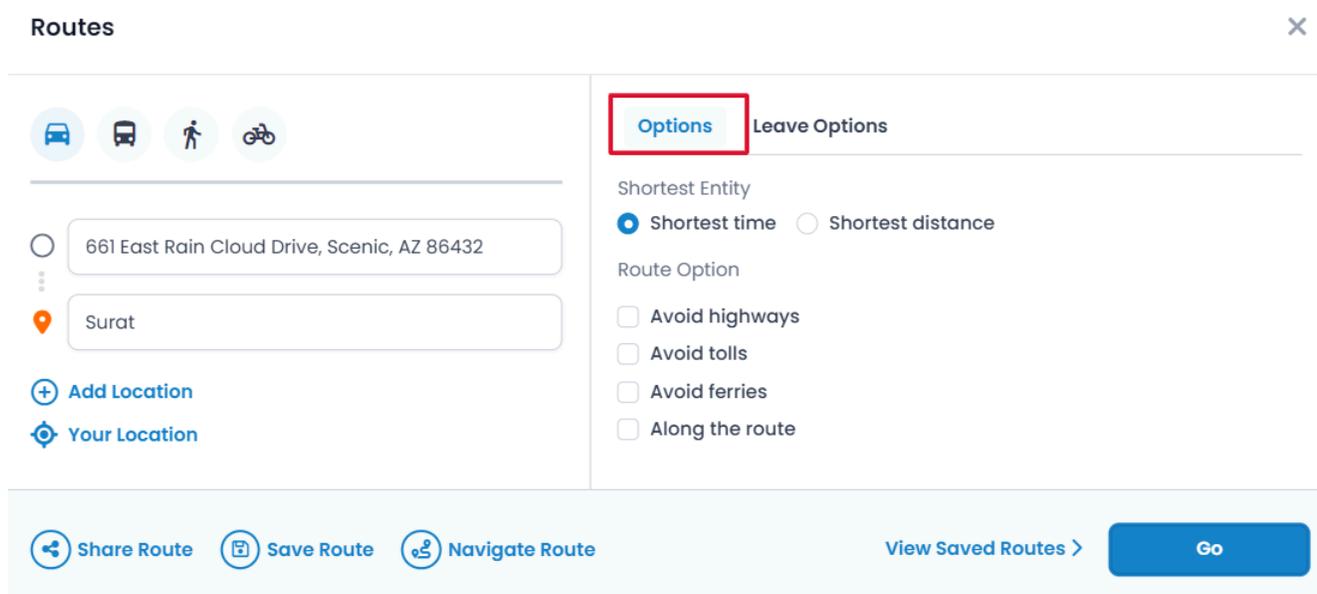


- You can also apply various filters on route by clicking on “Options” dropdown. Various filters related to Distance are:
- Route Name
- Assignee to
- Priority
- Date

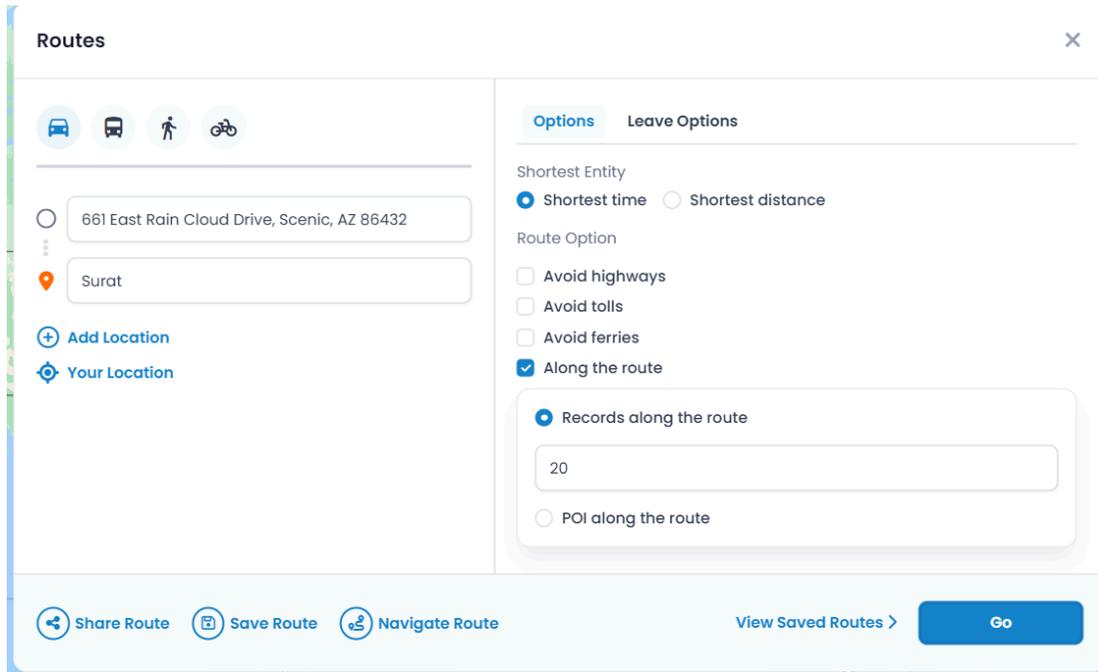


Along Route

Navigate to **Options**.



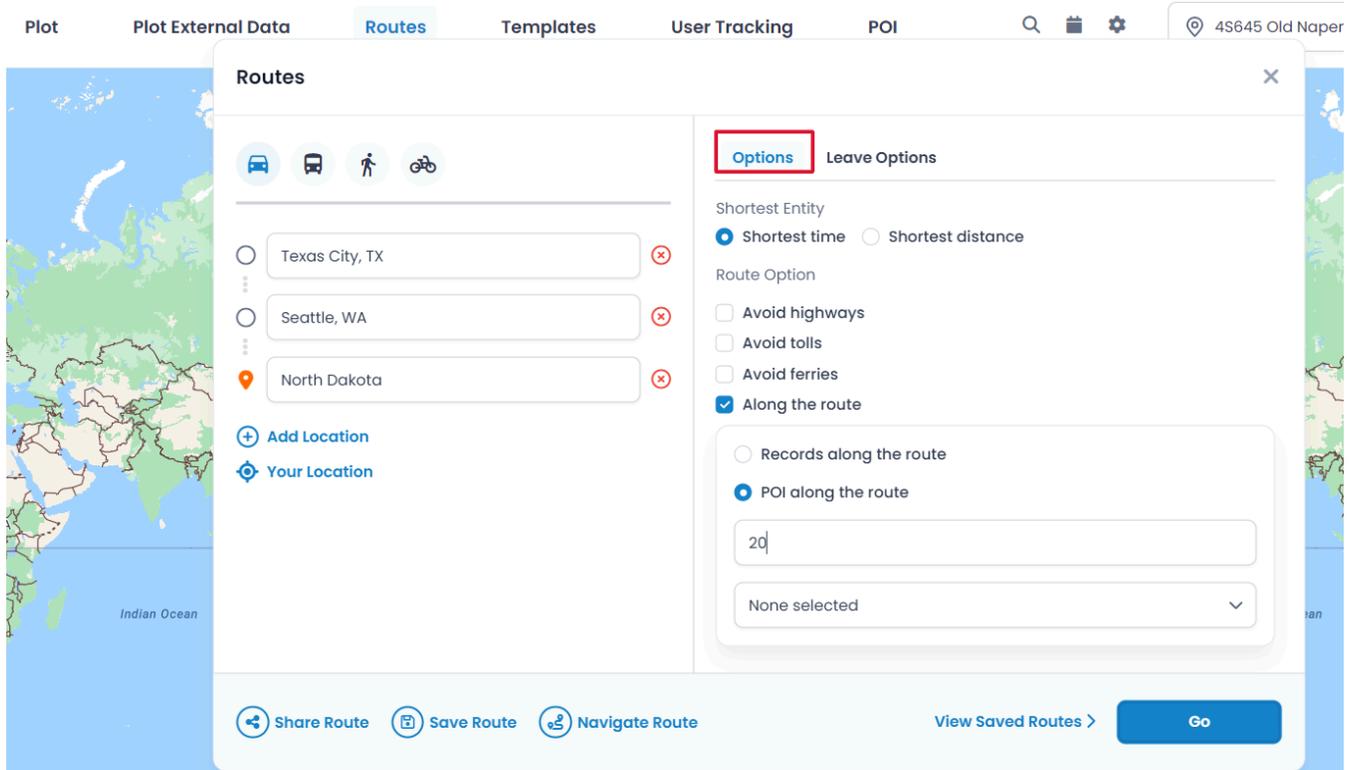
- Now, selecting **Along the route** search option displayed in the **Options** drop down section prompts the user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of the plotted route and displays pin in different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



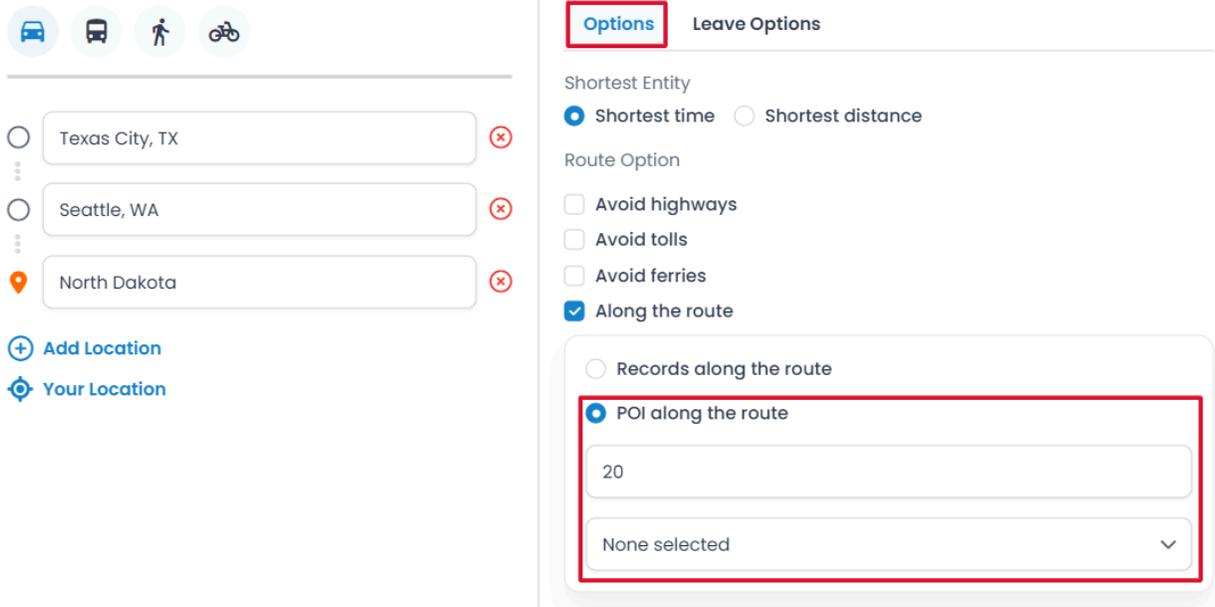
POI along the route

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.

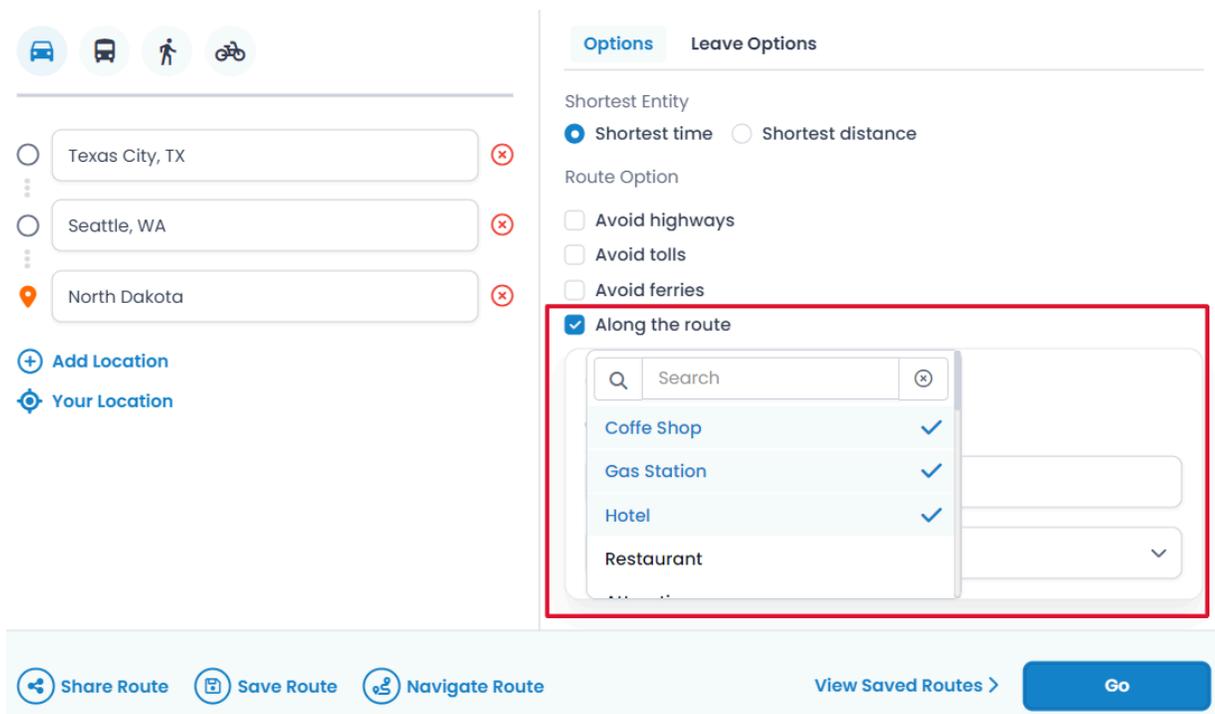


Select the checkbox of POI along the route in the Options section where a list of all the available POIs are listed.



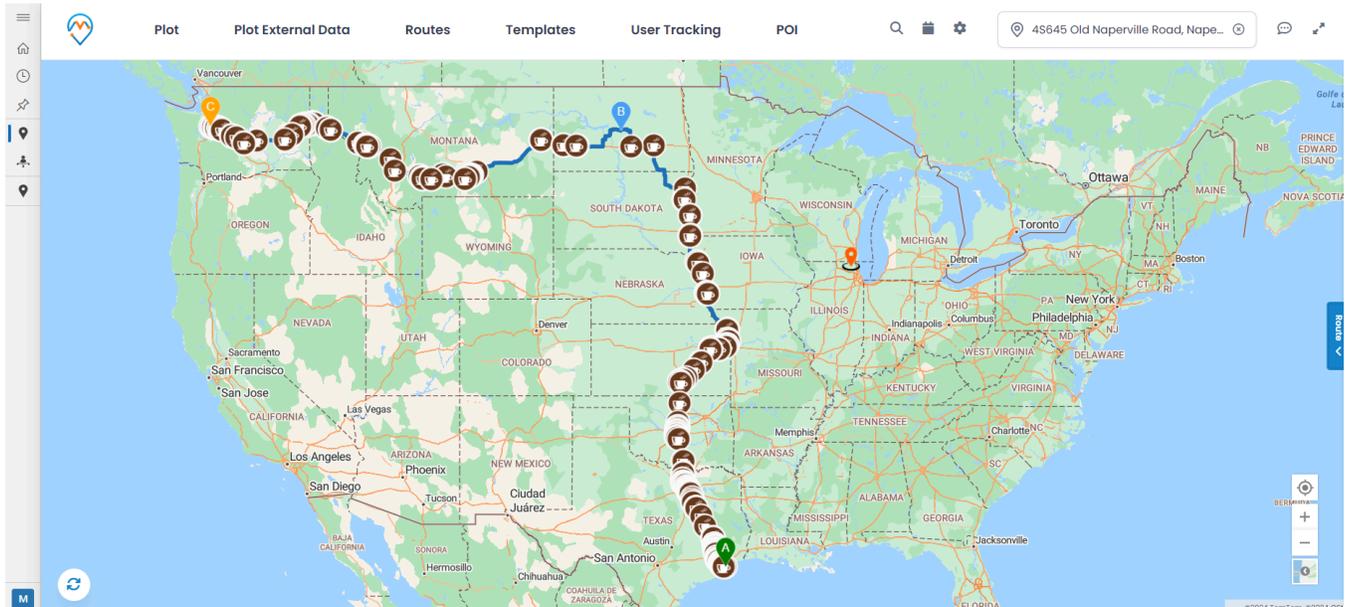
The screenshot shows the 'Options' tab of the Appjetty interface. On the left, there are three location input fields: 'Texas City, TX', 'Seattle, WA', and 'North Dakota'. Below these are buttons for 'Add Location' and 'Your Location'. The 'Options' panel on the right includes a 'Shortest Entity' section with 'Shortest time' selected. Under 'Route Option', 'Along the route' is checked. A sub-section titled 'Records along the route' has 'POI along the route' selected, with a text input field containing '20' and a dropdown menu set to 'None selected'. A red box highlights the 'POI along the route' section.

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.



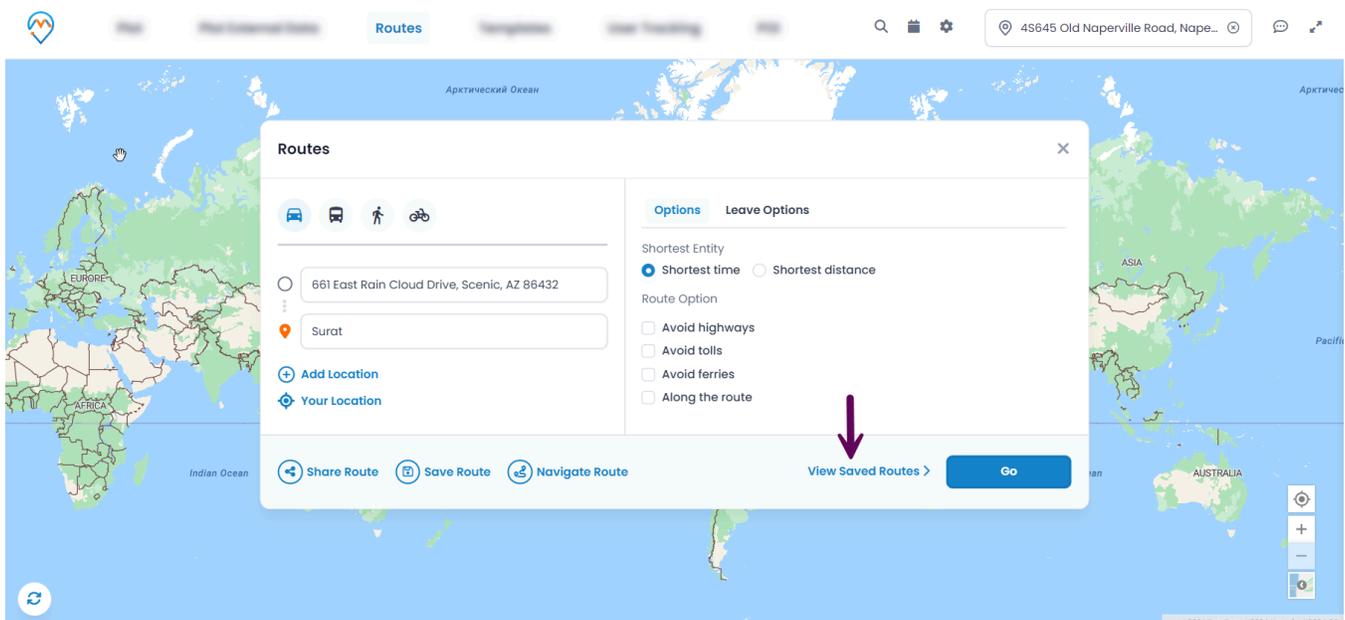
This screenshot shows the same Appjetty interface as above, but with the 'Along the route' dropdown menu open. The menu lists 'Coffe Shop', 'Gas Station', 'Hotel', and 'Restaurant', each with a checkmark. A search bar is visible at the top of the dropdown. A red box highlights the entire dropdown menu area. At the bottom of the interface, there are buttons for 'Share Route', 'Save Route', 'Navigate Route', 'View Saved Routes', and a prominent blue 'Go' button.

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

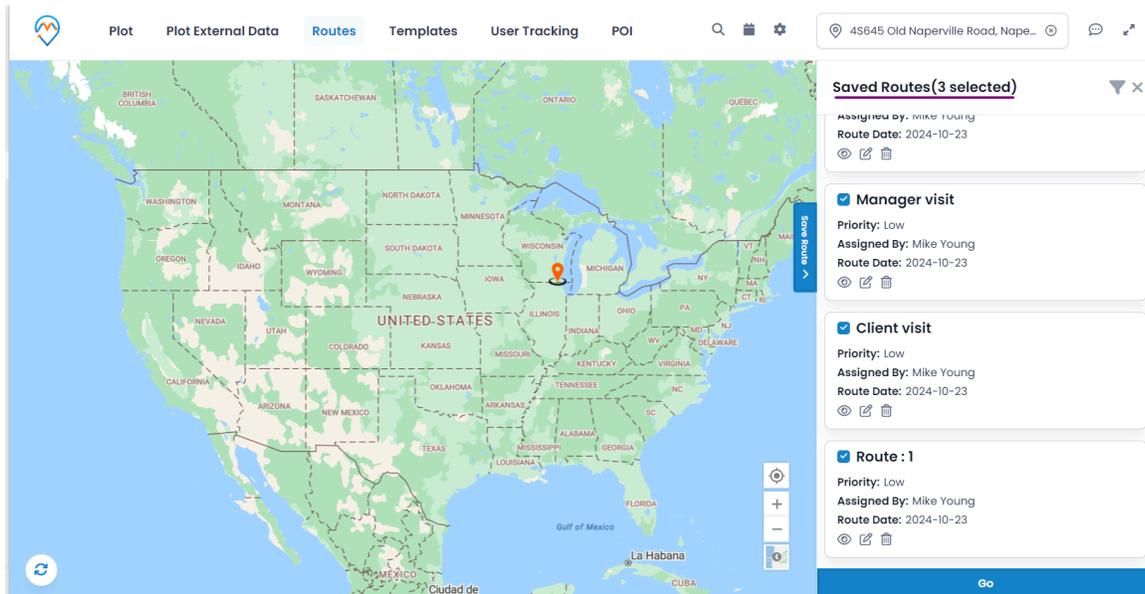


Multiple Saved Routes

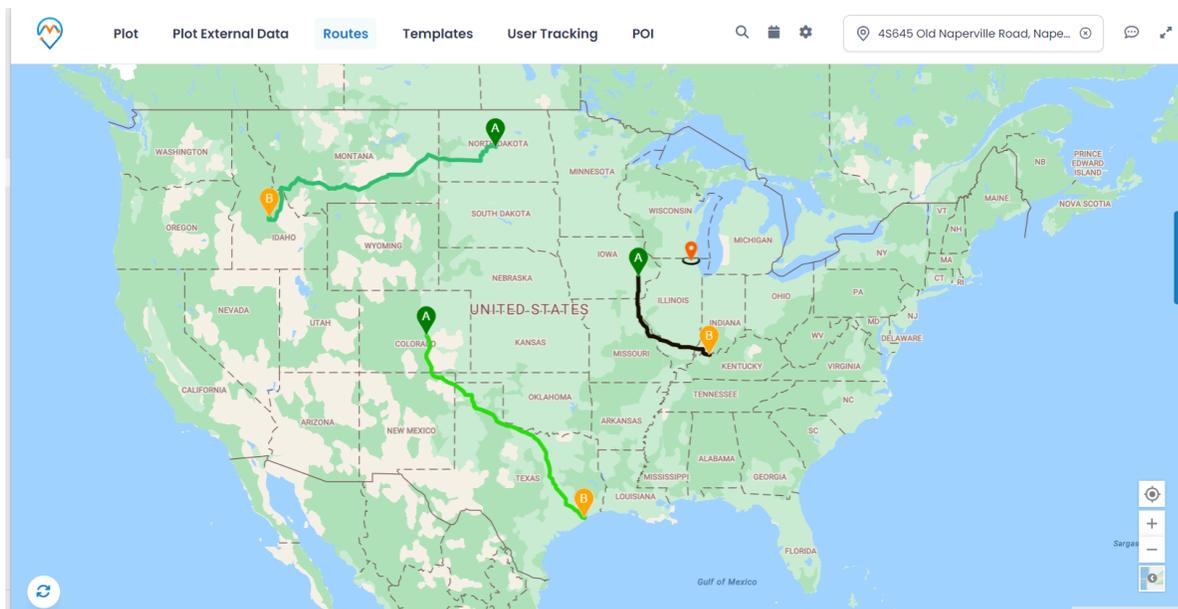
You can plot multiple addresses at a time on the map. In order to do so, navigate to Routes and click on Saved Routes.



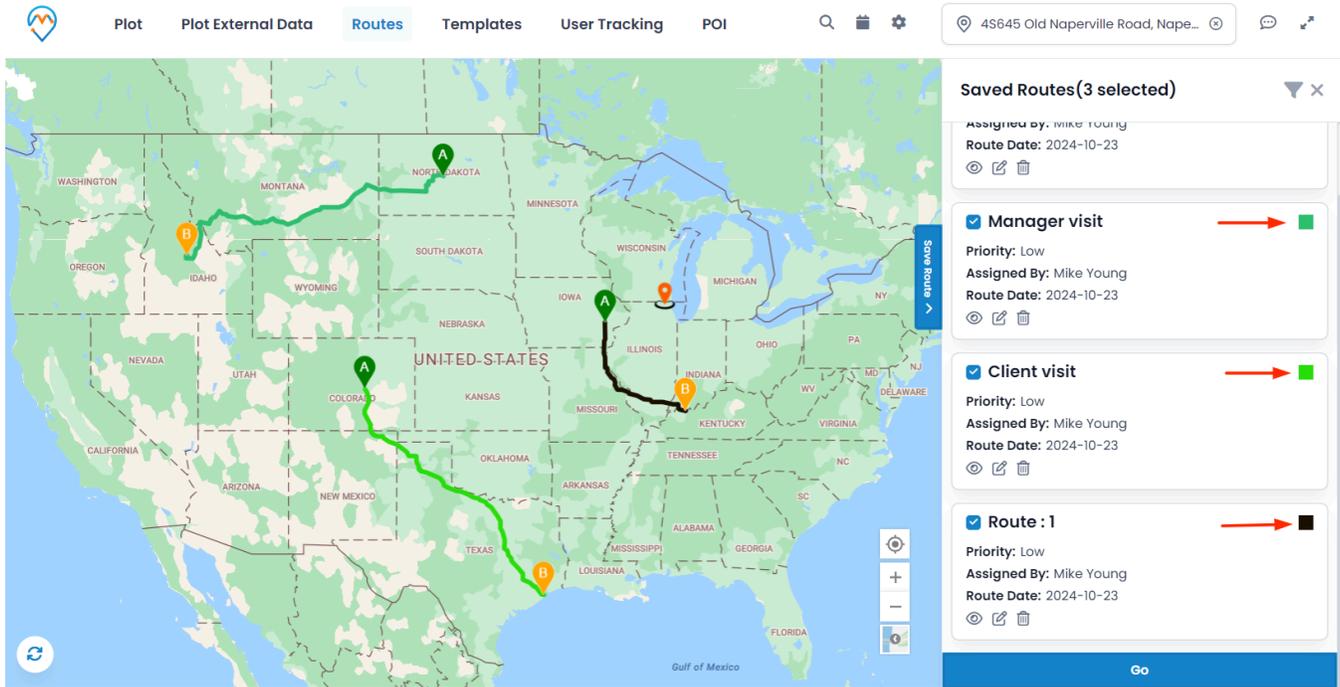
A slider will be displayed consisting of all the saved routes. Select the routes you want to view on the map.



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



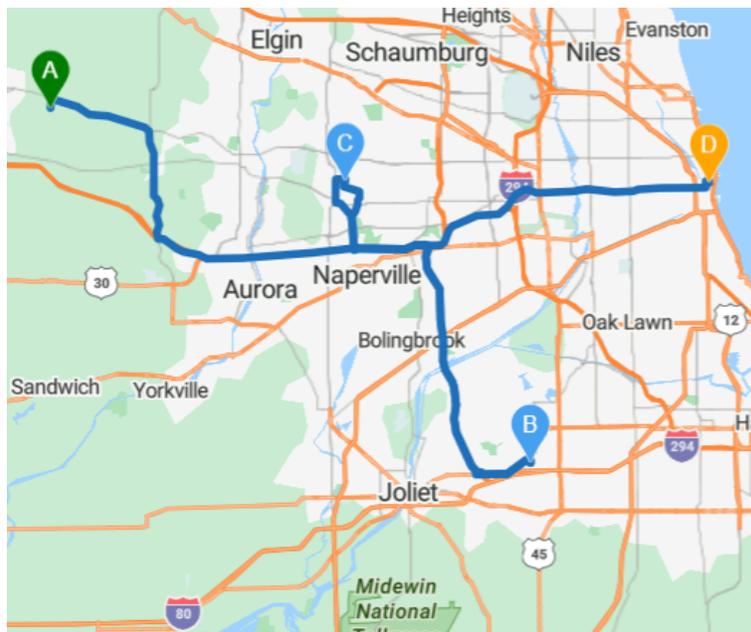
The colors of the routes are mentioned in front of the respective routes in the Saved Routes slider.



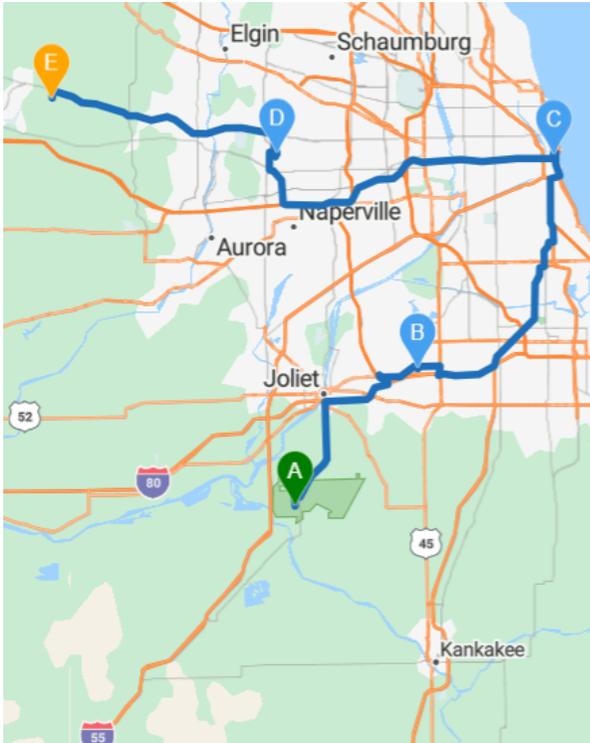
SPF (Shortest Path First)

- 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



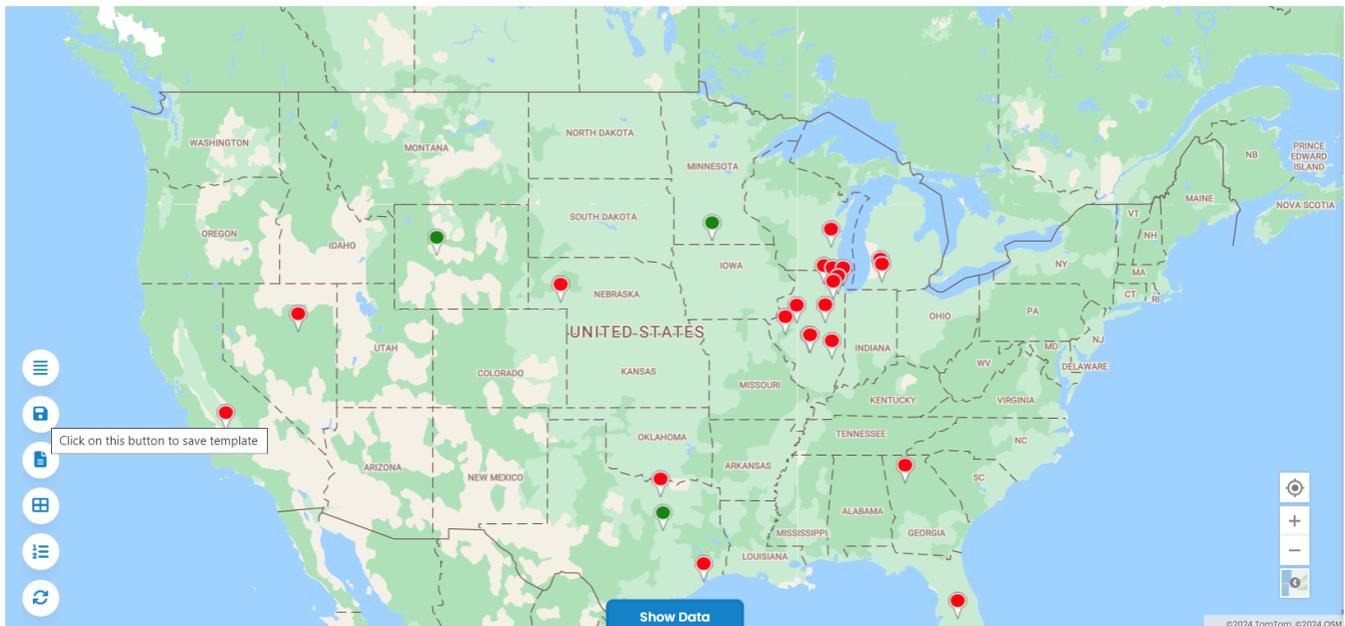
After SPF



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

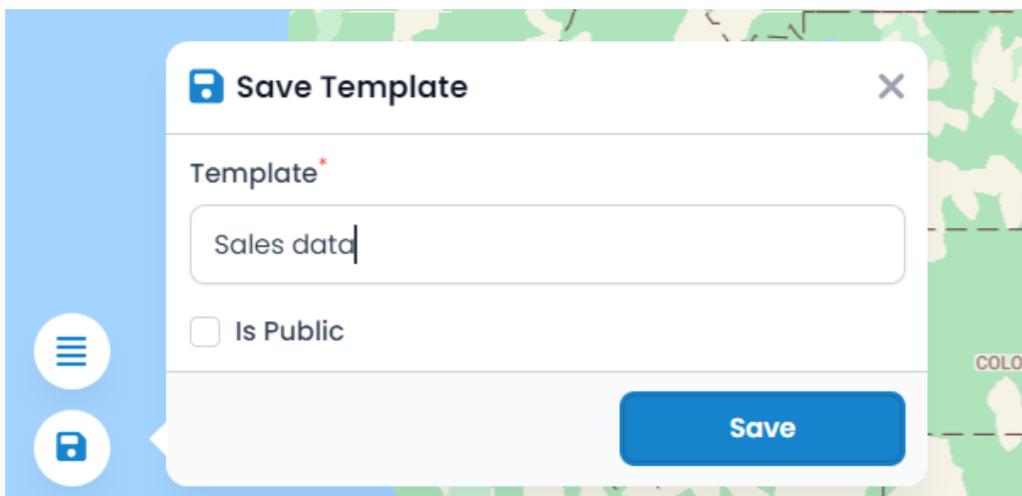
Templates

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

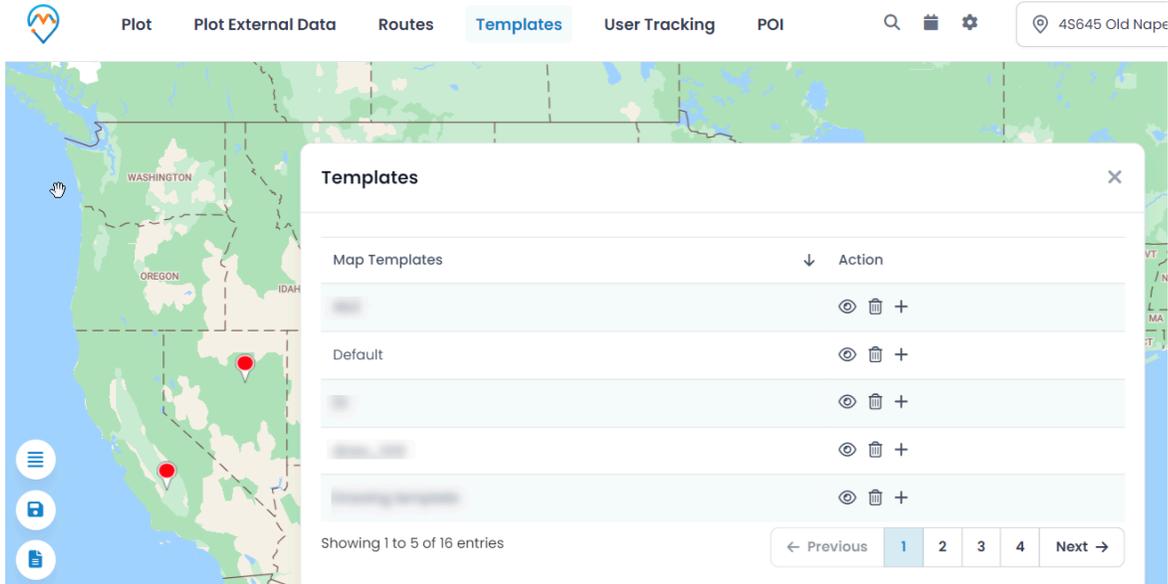


- If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

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



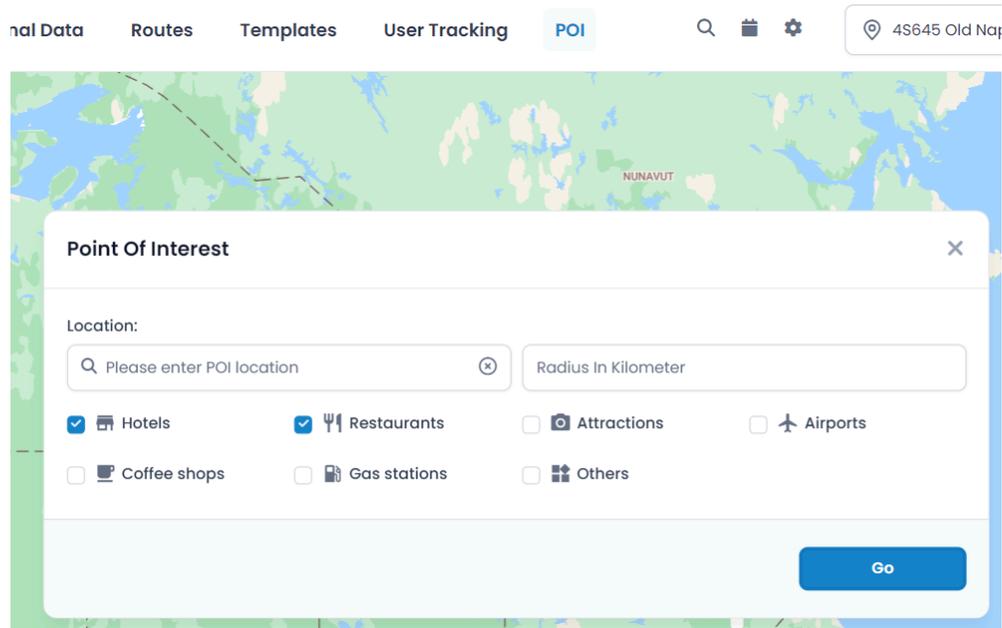
- Under the Templates section, logged in users can see all the templates created by them or the templates that are made public.



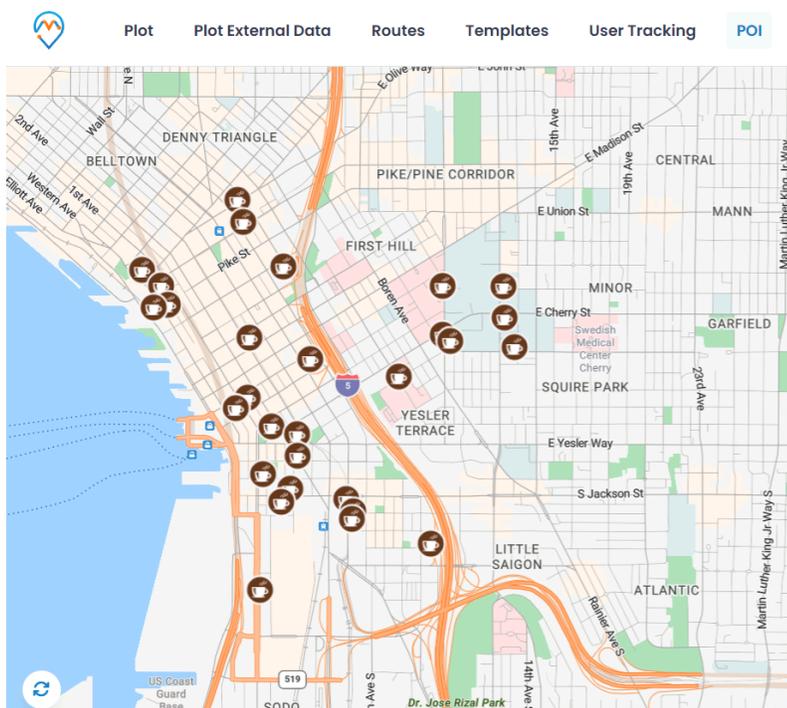
- The templates can be previewed by clicking on View icon  or You can delete as per your requirement.
- Through the **Plus icon**, you will be able to make that particular template, default.

POI-Point of Interest

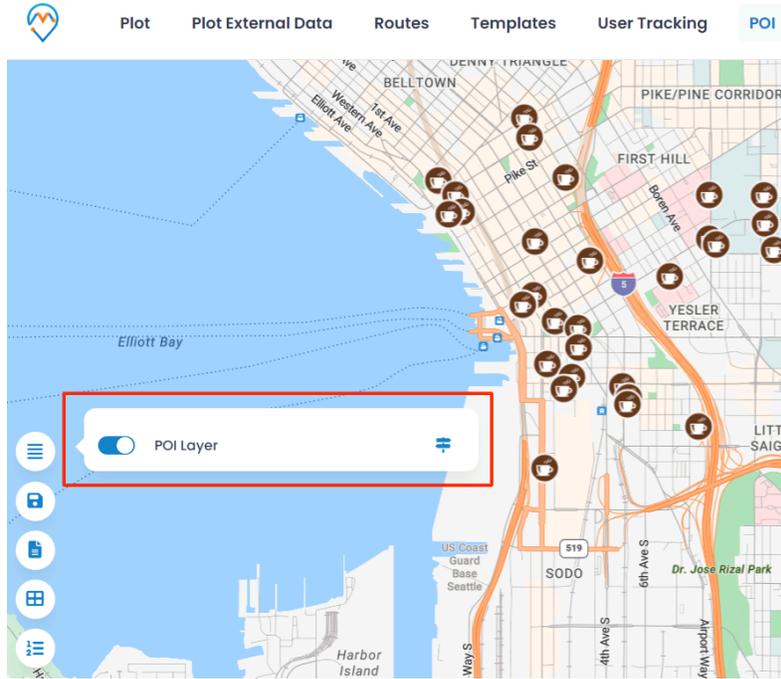
- If you want to search specific locations like restaurant, coffee shops, hotels, airport, gas station, etc. near the plotted records, click on **Point of Interest** tab.
- You must insert the location; the autofill dropdown will appear. You will get the POI location bases on your location.



- 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.



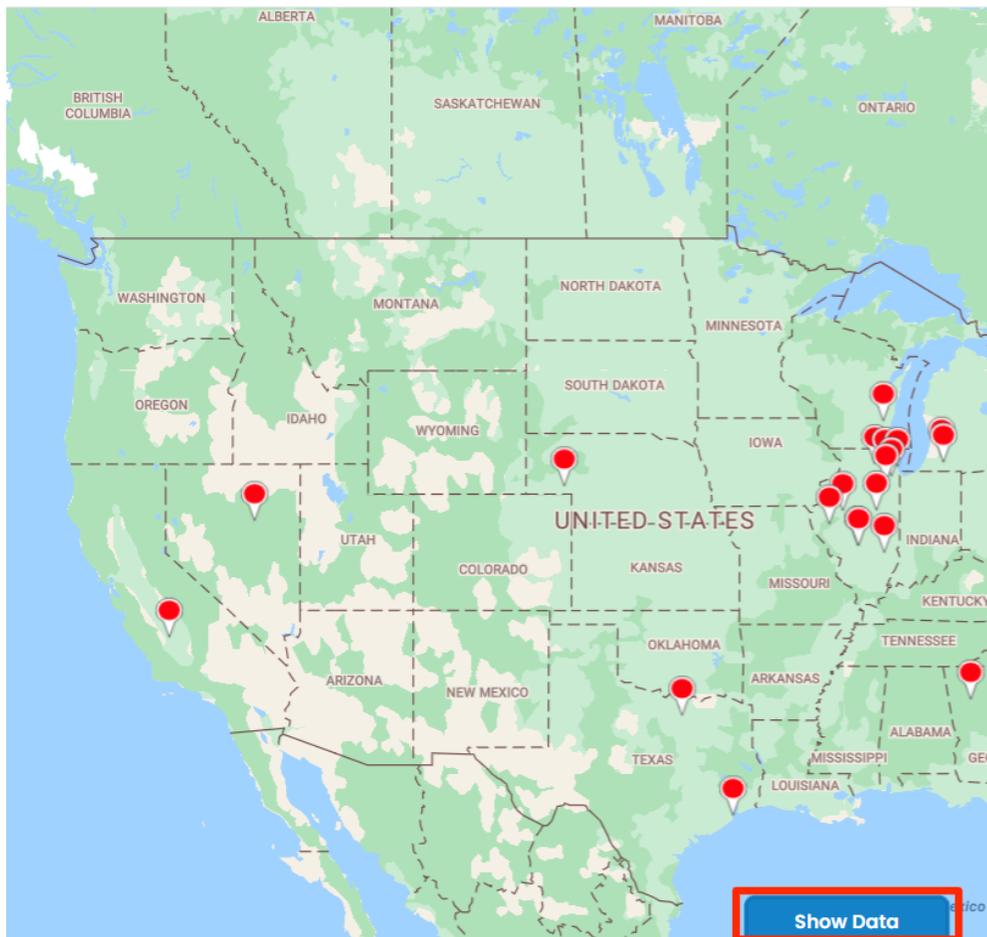
- From the “Layer card”, you will get the **POI Layer** and you can also check the POI locations in detail from the “Details cards” on the right side of the map.



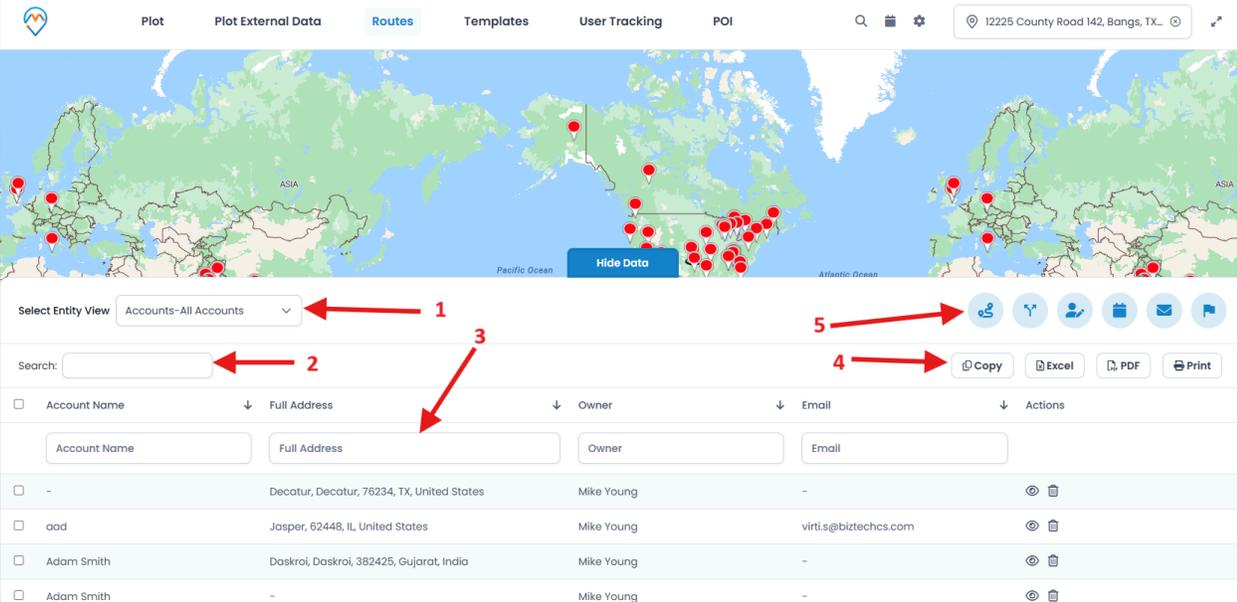
Data Grid

- **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**.

[Plot](#) [Plot External Data](#) [Routes](#) [Templates](#) [User Tracking](#) [POI](#)

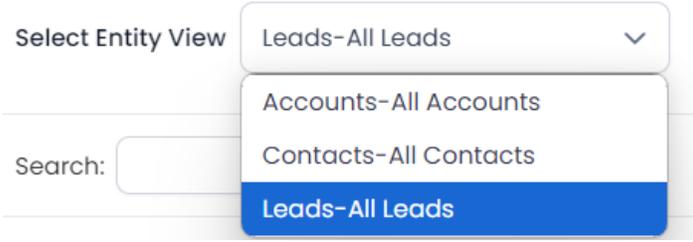


- By clicking on **Show Data**, a slider will open. You can view the plotted data as per selection of Entity. In the dropdown list, you will get only those entities which are selected to plot the record on map



The screenshot shows the Appjetty interface with a map and a data table. The map displays several red location pins across North America. Below the map is a 'Select Entity View' dropdown menu set to 'Accounts-All Accounts'. A search bar is located below the dropdown. The data table has columns for 'Account Name', 'Full Address', 'Owner', and 'Email'. Below the table are buttons for 'Copy', 'Excel', 'PDF', and 'Print'. To the right of the table are action icons for 'View', 'Location', 'Calendar', 'Mail', and 'Flag'.

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



The image shows a close-up of the 'Select Entity View' dropdown menu. The dropdown is open, showing four options: 'Leads-All Leads', 'Accounts-All Accounts', 'Contacts-All Contacts', and 'Leads-All Leads'. The 'Leads-All Leads' option is highlighted in blue.

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



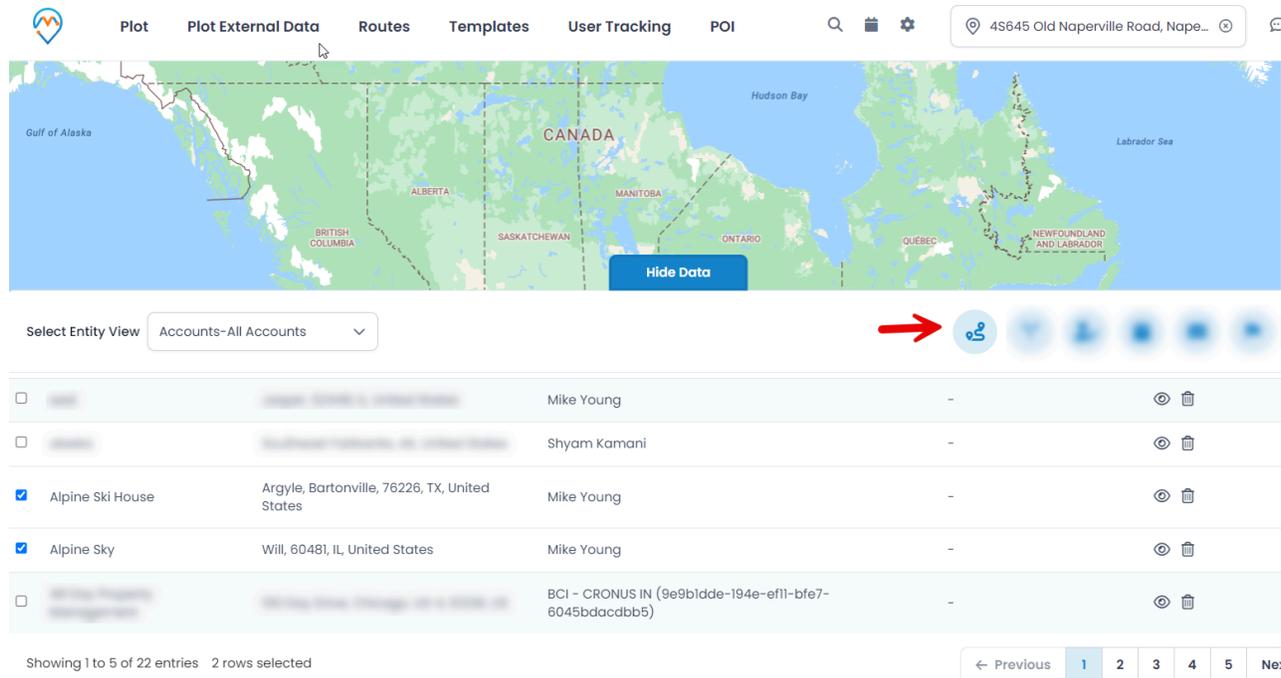
- By clicking on **View** icon , that record will get opened in CRM. By clicking on **Delete** icon , it deletes the respective record from the CRM.

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.



The screenshot shows the Appjetty interface with a map of Canada and a data grid. The map displays various provinces and territories, including British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, Quebec, and Newfoundland and Labrador. A red arrow points to the first icon in the data grid, which is a blue circle with a white person icon.

Select Entity View: Accounts-All Accounts

Route Name	Address	User	Status	Actions
<input type="checkbox"/>		Mike Young	-	
<input type="checkbox"/>		Shyam Kamani	-	
<input checked="" type="checkbox"/>	Alpine Ski House Argyle, Bartonville, 76226, TX, United States	Mike Young	-	
<input checked="" type="checkbox"/>	Alpine Sky Will, 60481, IL, United States	Mike Young	-	
<input type="checkbox"/>	BCI - CRONUS IN (9e9b1dde-194e-ef11-bfe7-6045bdacddb5)		-	

Showing 1 to 5 of 22 entries 2 rows selected

Navigation: < Previous 1 2 3 4 5 Next >

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 5:00 PM

Select Activity Meeting

Start Location* Texas City, TX

Review + Create

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

Review Activity

Duration 30 minutes 24-10-2024

Set Duration for all Marketing visit-10/24/2024

Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	 

← Previous 1 Next →

Create

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

Review Activity



Duration

30 minutes

24-10-2024

Set Duration for all

Marketing visit-10/24/2024



Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	

← Previous 1 Next →

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



Duration

30 minutes

24-10-2024

Set Duration for all

Marketing visit-10/24/2024

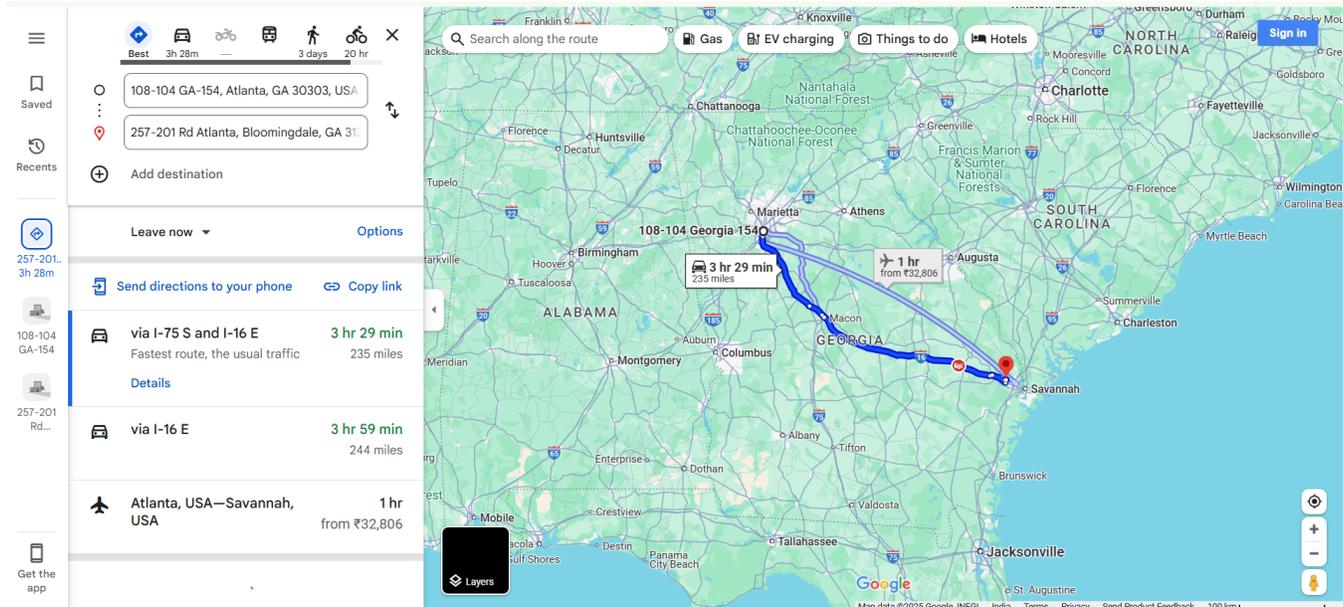


Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	

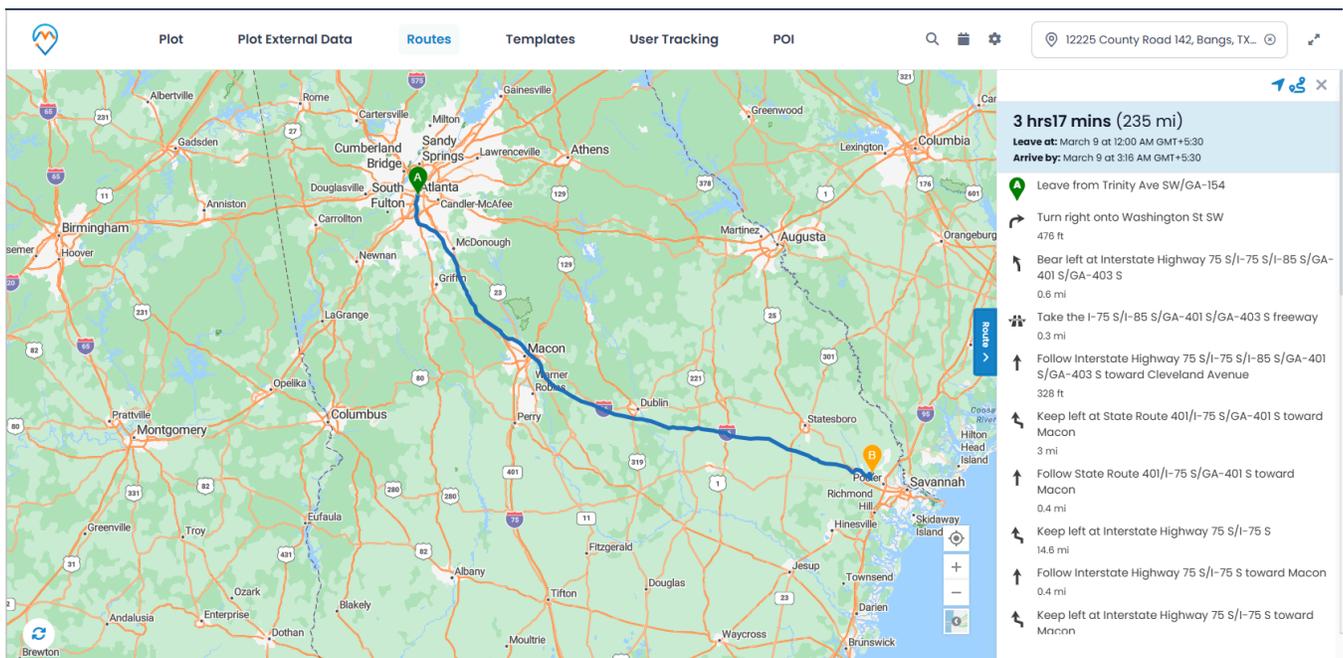
← Previous 1 Next →

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





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.

Review Activity



Duration

30 minutes



24-10-2024



Set Duration for all

Marketing visit-10/24/2024



Subject	↓	Regarding	Duration	Start Date	End Date	Action
---------	---	-----------	----------	------------	----------	--------

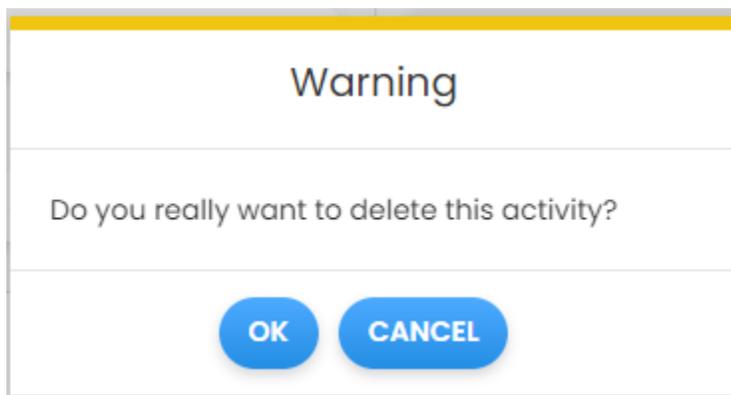
Appointment With Peter		Peter	30 Min	12:49 PM	1:19 PM	
---------------------------	--	-------	--------	----------	---------	--



← Previous 1 Next →

Create

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**.



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

Review Activity ✕

Duration

30 minutes 24-10-2024

Set Duration for all Marketing visit-10/24/2024 📖 📍

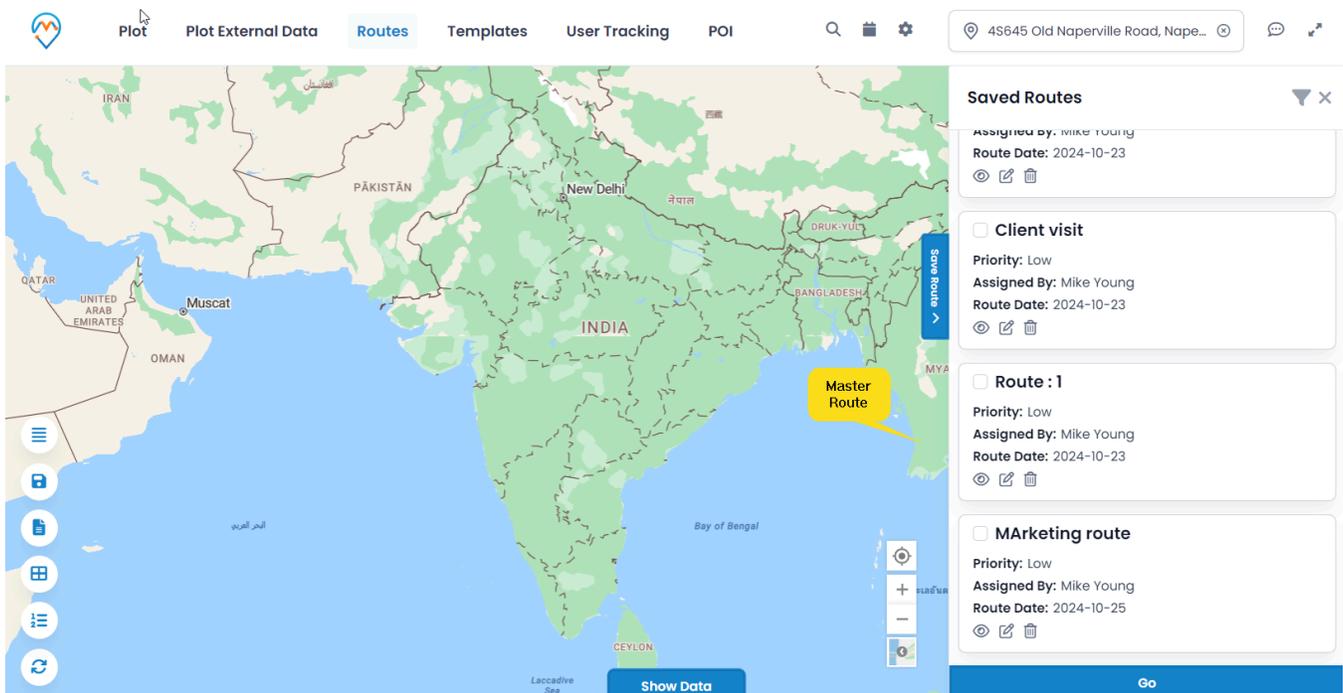
Subject	↓ Regarding	Duration	Start Date	End Date	Action
Appointment With Peter	Peter	30 Min ↓	12:49 PM 🕒	1:19 PM 🕒	✎ 🗑

← 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 screenshot shows the app's main interface with a map of India. The top navigation bar includes 'Plot', 'Plot External Data', 'Routes', 'Templates', 'User Tracking', and 'POI'. A search bar at the top right contains the address '4S645 Old Naperville Road, Nape...'. On the right side, a 'Saved Routes' sidebar is open, listing four routes:

- Client visit**
Priority: Low
Assigned By: Mike Young
Route Date: 2024-10-23
- Route : 1**
Priority: Low
Assigned By: Mike Young
Route Date: 2024-10-23
- Marketing route**
Priority: Low
Assigned By: Mike Young
Route Date: 2024-10-25

The map shows a yellow callout box labeled 'Master Route' pointing to a location in the Bay of Bengal region. A 'Show Data' button is visible at the bottom of the map area.

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*

User

Priority

Route Start Date*

Route End Date*

Start/End Time

Select Activity

Start Location*

[Review + Create](#)

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

Review Activity

Duration

Set Duration for all MArketng route-10/25/2024

Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With biztech ac	biztech ac	30 Min	1:39 PM	2:09 PM	

[← Previous](#) **1** [Next →](#)

[Update](#)

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

Car Bus Walking Bike

[+ Add Location](#)
[Your Location](#)

Options Leave Options

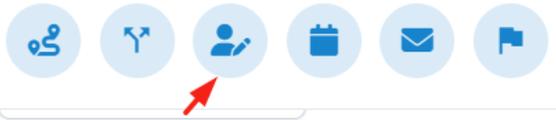
Shortest Entity
 Shortest time Shortest distance

Route Option
 Avoid highways
 Avoid tolls
 Avoid ferries
 Along the route

[Share Route](#) [Save Route](#) [Navigate Route](#) [View Saved Routes >](#) [Go](#)

Note: 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.

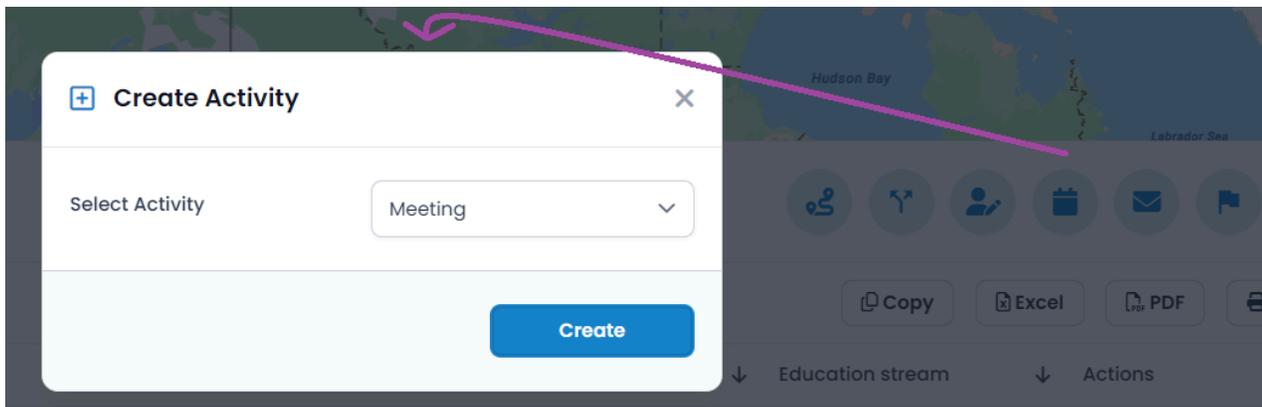
As you click on that icon, the **Assign to User or Team** popup window will open to select the User/Team. After selecting User/Teams, click on **Assign** button.

 **Assign to User or Team** ×

Select user or team to assign this record

User

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.

 **Send Email** ×

Select Email Template

Manage Territory



Manage Territory ×

Territory

Nevada ▾

Save

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

As you click on Territory icon, the **Manage 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

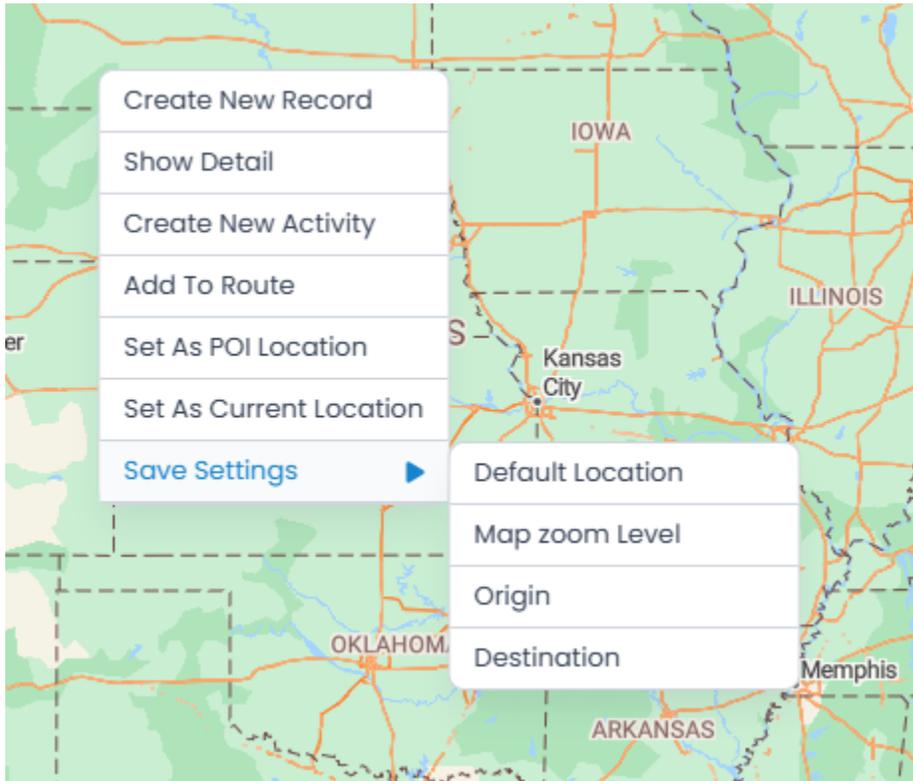
'Right click' on the map to open the Context M

- It provides options as below:

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

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

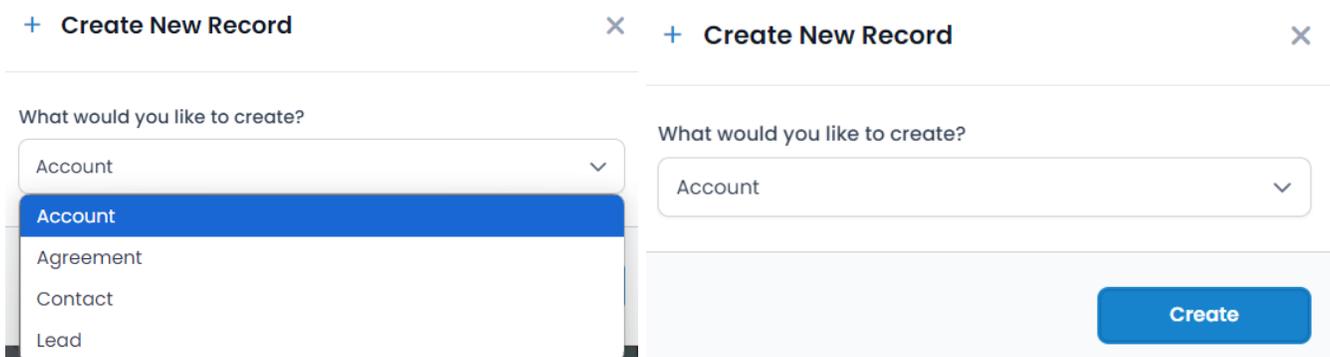
> Default Location > Map zoom level > Origin > Destination.



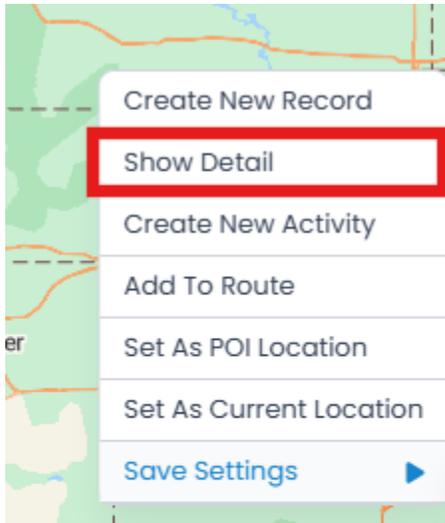
- These settings directly get saved under MappyField 365 Configuration record for logged in users.
- By selecting Create New Record Option, open a dialog box to select record type.

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.

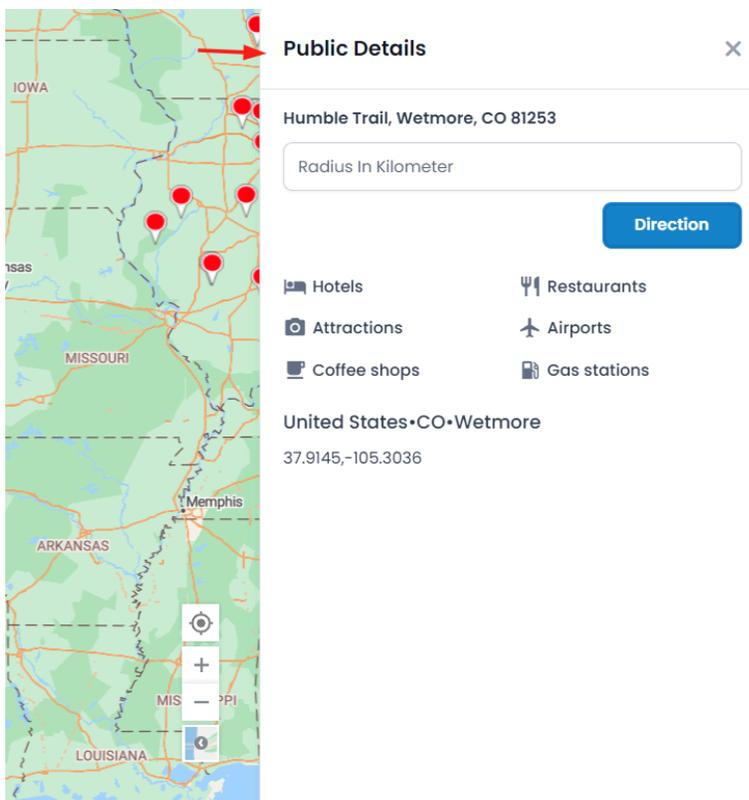


Show Detail

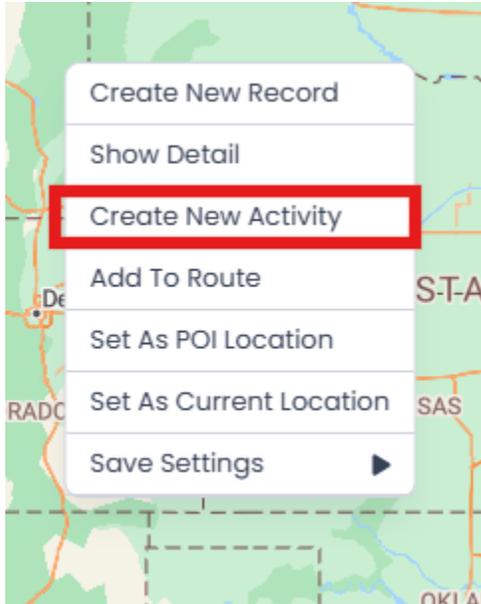


By clicking on the **Show Detail** option from the Context Menu, you will get the popup window of the 'Public Details' from the right side as per the location.

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

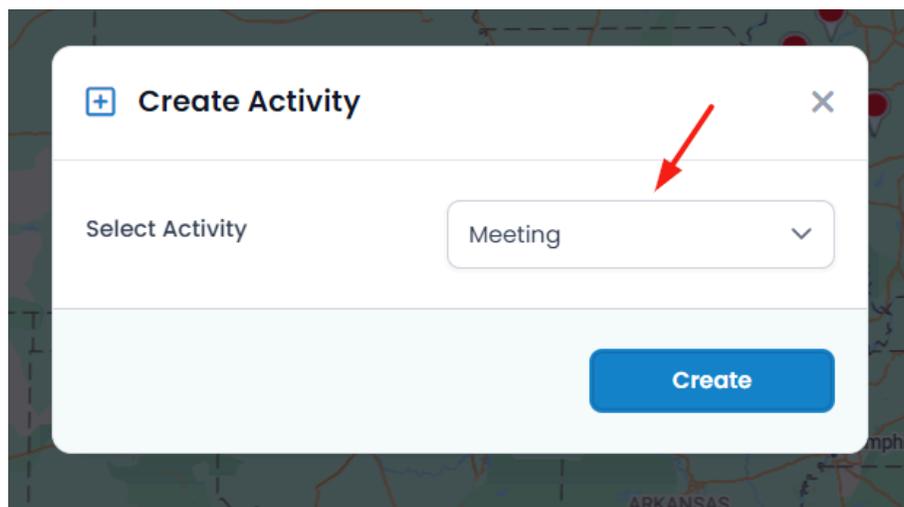


Create New Activity



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.



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

Quick Create: Meeting ✕

Owner * MY Mike Young ✕ 🔍

Required Attendees --- 🔍

Optional Attendees --- 🔍

Subject * ---

Location ---

Teams meeting No

APPOINTMENT DETAILS

Start Time * 10/24/2024 🗓
3:00 PM ⌵

End Time * 10/24/2024 🗓
3:30 PM ⌵

All Day Event

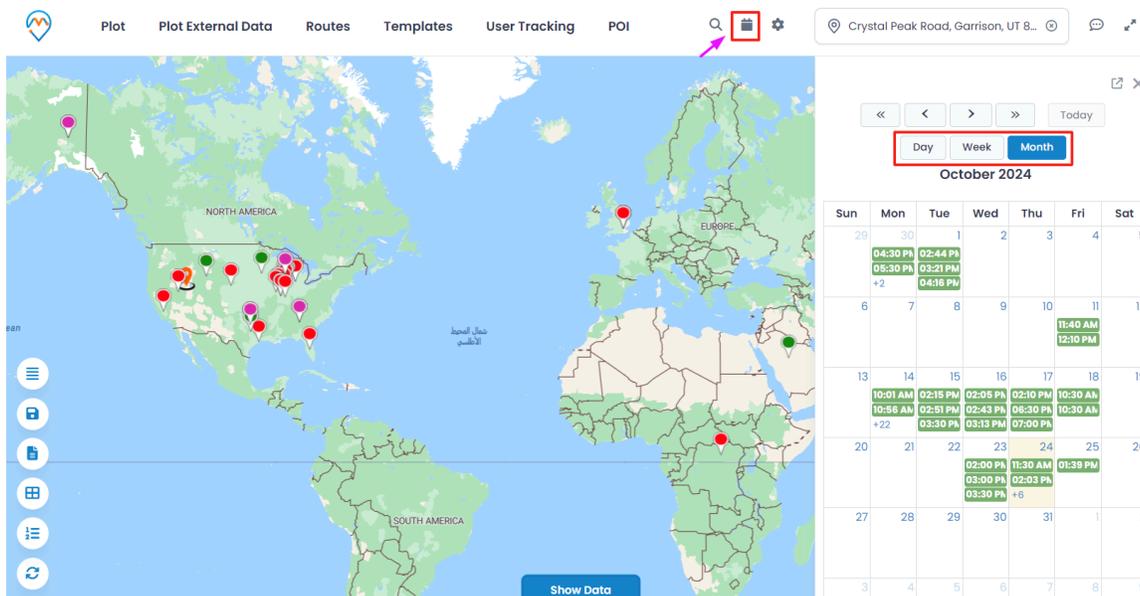
Duration 30 minutes ⌵

Save and Close ⌵
Cancel

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

Calendar View

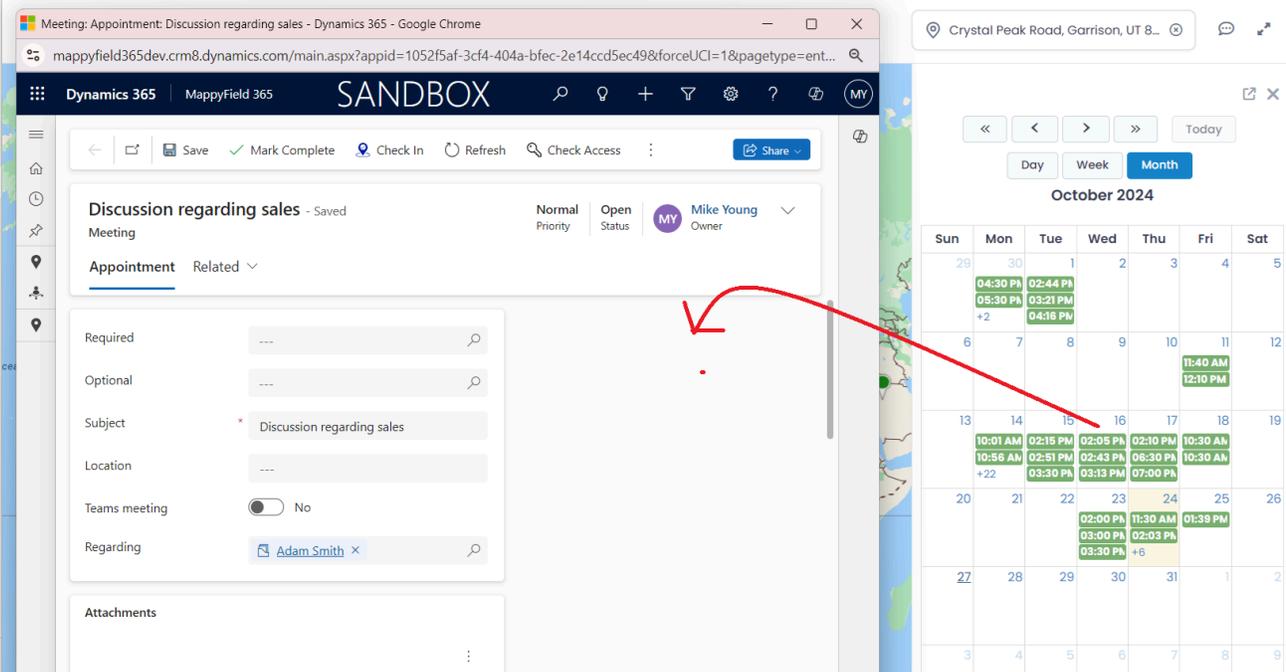
- You can also view the plotted activity records in the calendar view along with the Map view.



The screenshot shows the app's interface with a map on the left and a calendar on the right. The map displays activity markers across North America and Europe. The calendar view is for October 2024, showing activity records for various dates. The calendar view includes navigation arrows, a 'Today' button, and tabs for 'Day', 'Week', and 'Month' (selected). The calendar grid shows activity records for various dates, such as 04:30 PM to 08:30 PM on Oct 29, and 10:01 AM to 10:58 AM on Oct 13.

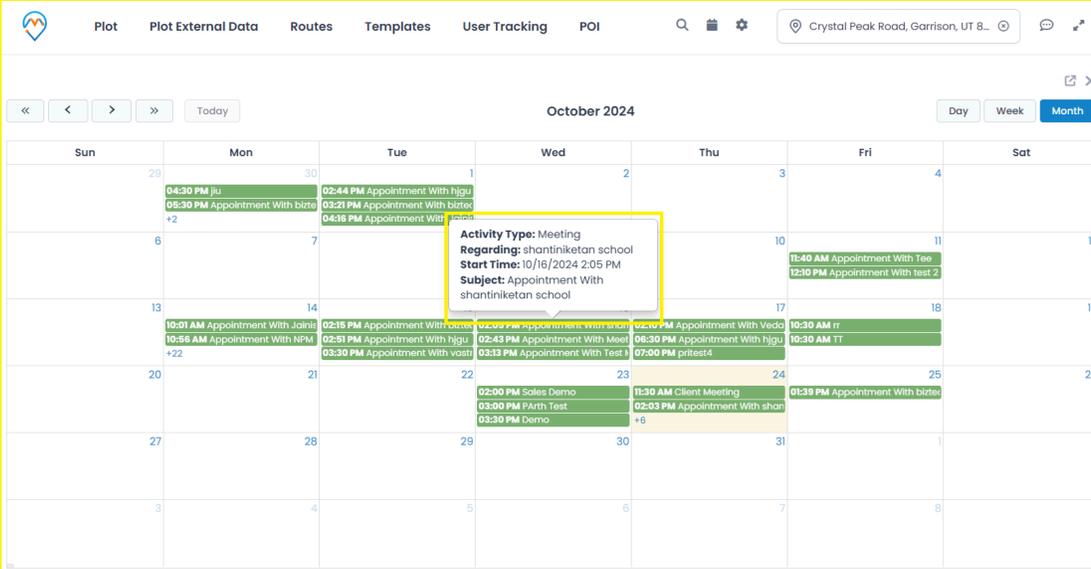
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29 04:30 PM 08:30 PM +2	30 02:44 PM 03:21 PM 04:18 PM	1	2	3	4	5
6	7	8	9	10	11 11:40 AM 12:10 PM	12
13 10:01 AM 10:58 AM +22	14 02:18 PM 02:51 PM 03:30 PM	15 02:05 PM 03:13 PM	16 02:10 PM 02:03 PM	17 02:10 AM 07:00 PM	18	19
20	21	22 02:00 PM 03:00 PM 03:30 PM	23 11:30 AM 02:03 PM	24 01:39 PM +6	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

- 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.



The screenshot shows the Dynamics 365 interface. On the left, a meeting card titled "Discussion regarding sales" is displayed. The card includes fields for "Required", "Optional", "Subject" (Discussion regarding sales), "Location", "Teams meeting" (No), and "Regarding" (Adam Smith). On the right, a calendar view for October 2024 is shown. A red arrow points from the meeting card to the calendar, indicating the connection between the two views.

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



The screenshot shows the Dynamics 365 interface with a calendar view for October 2024. A summary card is displayed over the calendar, providing details for a meeting activity. The card includes the following information:

- Activity Type:** Meeting
- Regarding:** shantiniketan school
- Start Time:** 10/16/2024 2:05 PM
- Subject:** Appointment With shantiniketan school

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

Navigation: Plot, Plot External Data, Routes, Templates, User Tracking, POI

Location: Crystal Peak Road, Garrison, UT 8...

Calendar: October 2024 (Day, Week, Month view)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
	04:30 PM jiu 05:30 PM Appointment With bizte +2	02:44 PM Appointment With hjgu 03:21 PM Appointment With bizte 04:16 PM Appointment With Jaini				
6	7	8	9	10	11	12
					11:40 AM Appointment With Tee 12:10 PM Appointment With test 2	
13	14	15	16	17	18	19
	10:01 AM Appointment With Jaini 10:56 AM Appointment With NPM +22	02:15 PM Appointment With bizte 02:51 PM Appointment With hjgu 03:30 PM Appointment With vasti	02:05 PM Appointment With shan 02:43 PM Appointment With Meet 03:13 PM Appointment With Test 1	02:10 PM Appointment With Veda 08:30 PM Appointment With hjgu 07:00 PM pritest4	10:30 AM rr 10:30 AM TT	
20	21	22	23	24	25	26
			02:00 PM Sales Demo 03:00 PM PArth Test 03:30 PM Demo	11:30 AM Client Meeting 02:03 PM Appointment With shan +6	01:39 PM Appointment With bizte	
27	28	29	30	31	1	2
3	4	5	6	7	8	9

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

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
	04:30 PM jiu 05:30 PM Appointment With bizte +2	02:44 PM Appointment With hjgu 03:21 PM Appointment With bizte 04:16 PM Appointment With Jaini				
6	7	8	9	10	11	12
					11:40 AM Appointment With Tee 12:10 PM Appointment With test 2	
13	14	15	16	17	18	19
	10:01 AM Appointment With Jaini 10:56 AM Appointment With NPM +22	02:15 PM Appointment With bizte 02:51 PM Appointment With hjgu 03:30 PM Appointment With vasti	02:05 PM Appointment With shan 02:43 PM Appointment With Meet 03:13 PM Appointment With Test 1	02:10 PM Appointment With Veda 08:30 PM Appointment With hjgu 07:00 PM pritest4	10:30 AM rr 10:30 AM TT	
20	21	22	23	24	25	26
			02:00 PM Sales Demo 03:00 PM PArth Test 03:30 PM Demo	11:30 AM Client Meeting 02:03 PM Appointment With shan +6	01:39 PM Appointment With bizte	
27	28	29	30	31	1	2
3	4	5	6	7	8	9

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

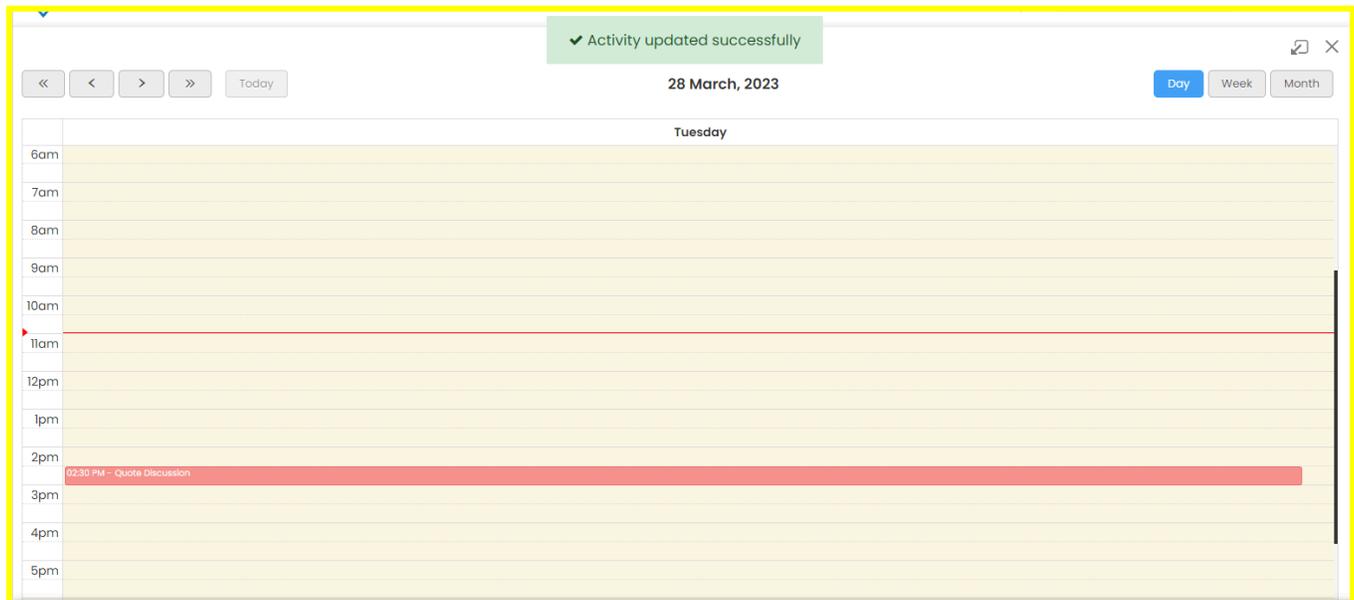
Warning

Appointment With Datum corporation
will be rescheduled to 12-03-2025 08:46:00.
Are you sure you want to reschedule this activity

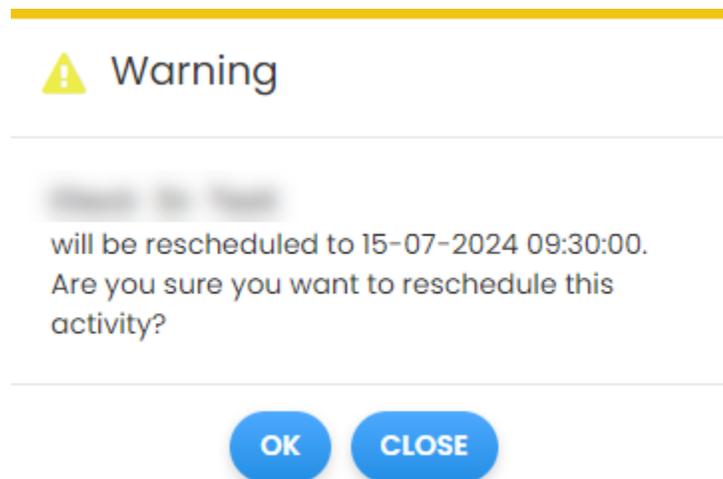
OK **CLOSE**

- Activity updated successfully message will appear on the screen.

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



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



- **Activity updated successfully** message will appear on the screen.

✓ Activity updated successfully



Today

28 March, 2023

Day Week Month

Tuesday	
6am	
7am	
8am	
9am	
10am	
11am	
12pm	
1pm	
2pm	
3pm	
4pm	
5pm	05:00 PM - Quota Discussion

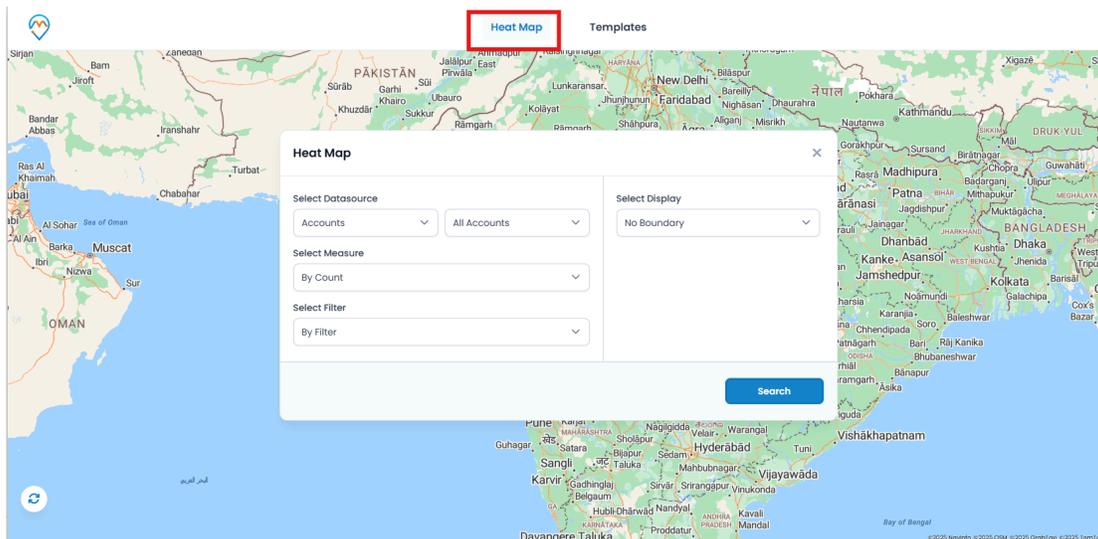
Heat Map

Note: Heat map is available only for Azure map, [Contact us](#) 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:



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

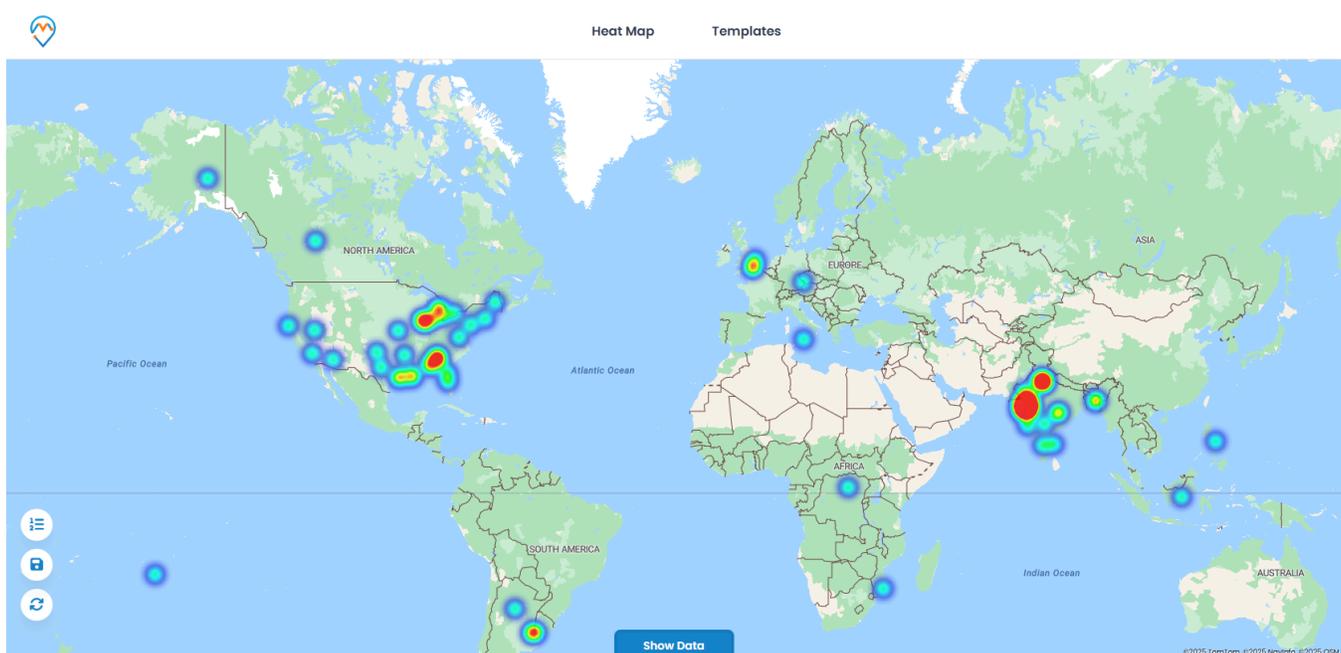
Heat Map ✕

Select Datasource
Accounts All Accounts

Select Measure
By Count

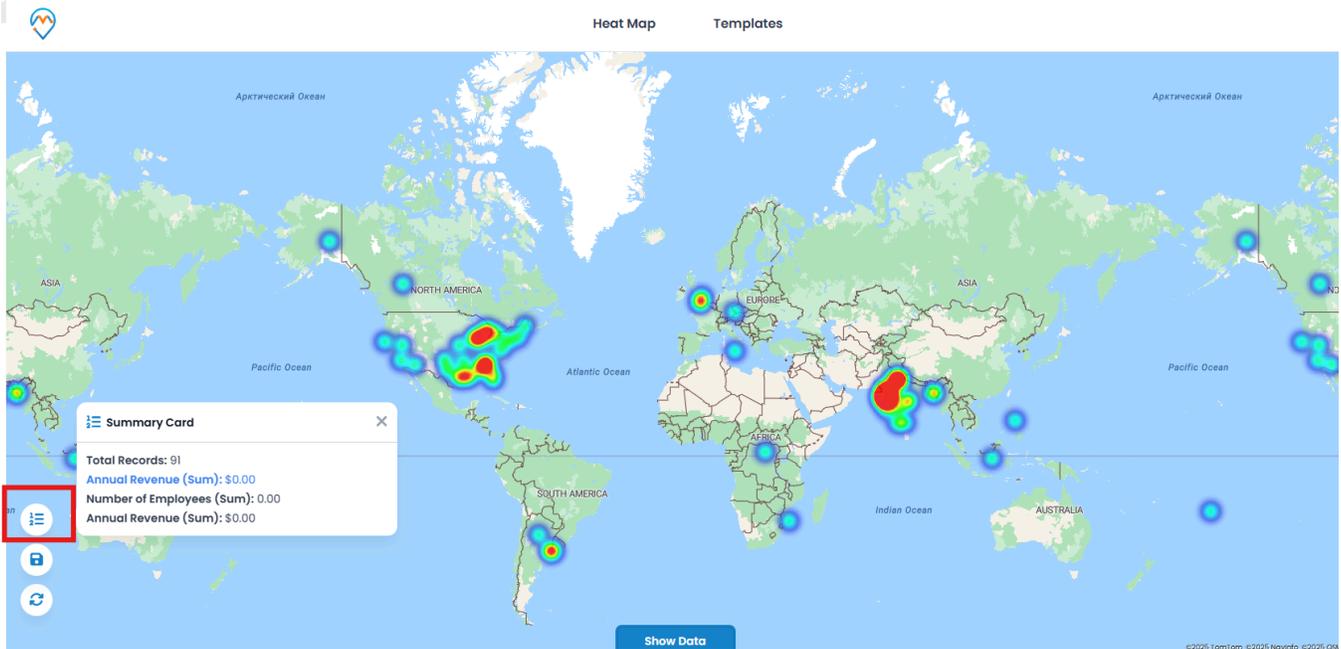
Select Filter
Account Name

Select Display
No Boundary

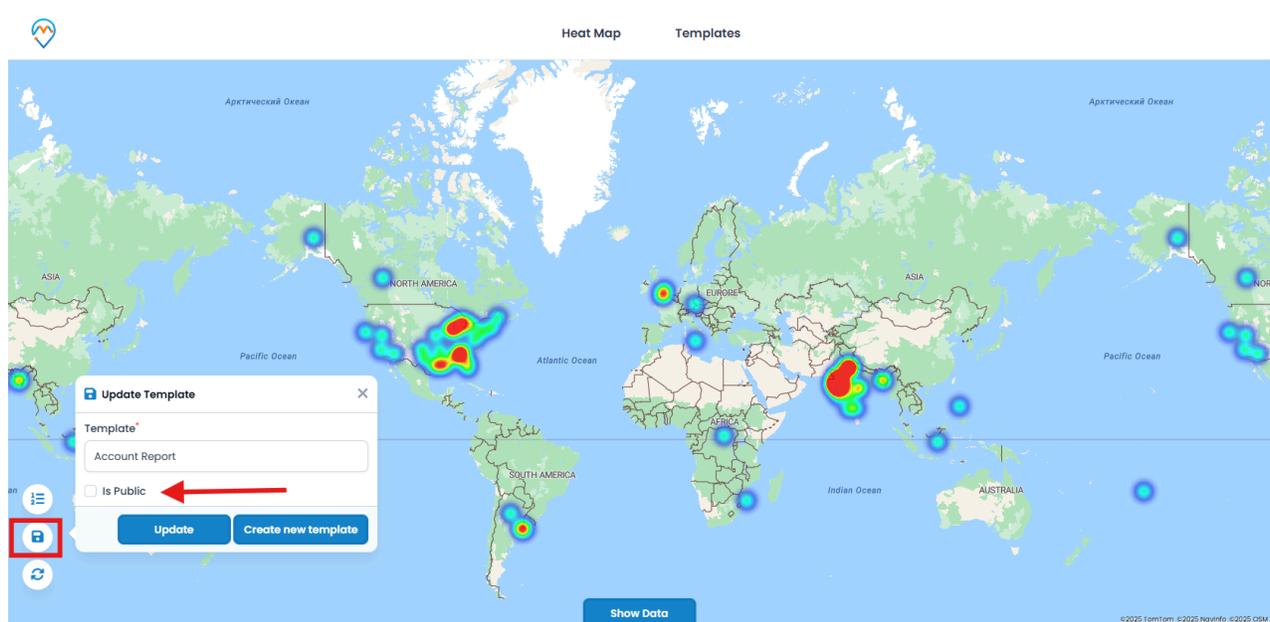


Heat Map Templates

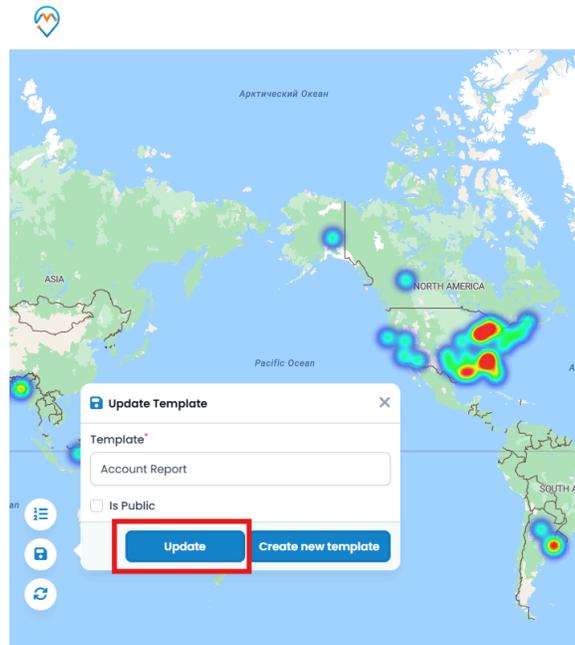
- Once all the Heat Map is generated by selecting the Data sources of any entity, you can check the records in the Summary Card and save the heat map as a template.



- 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 entries

Map Templates	Action
Account Report	  
BA	  
Open Revenue	  

Showing 1 to 3 of 3 entries

← Previous 1 Next →

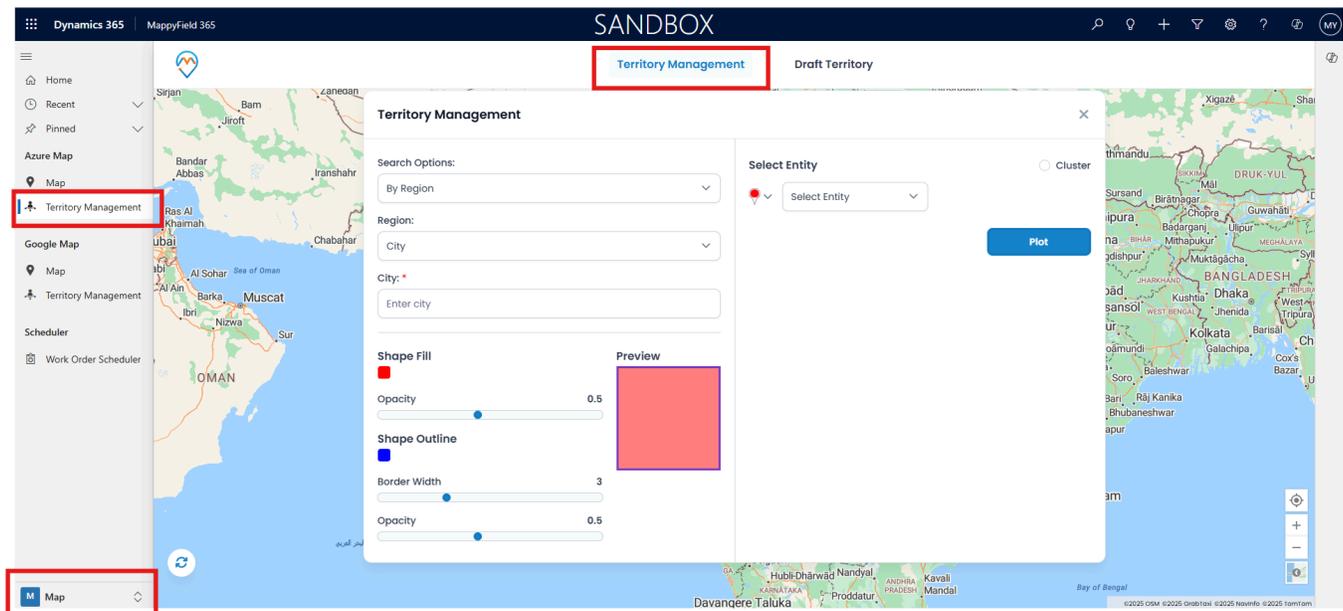
- To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the Heat map, it will load that default template.

By clicking on the view  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  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.



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:

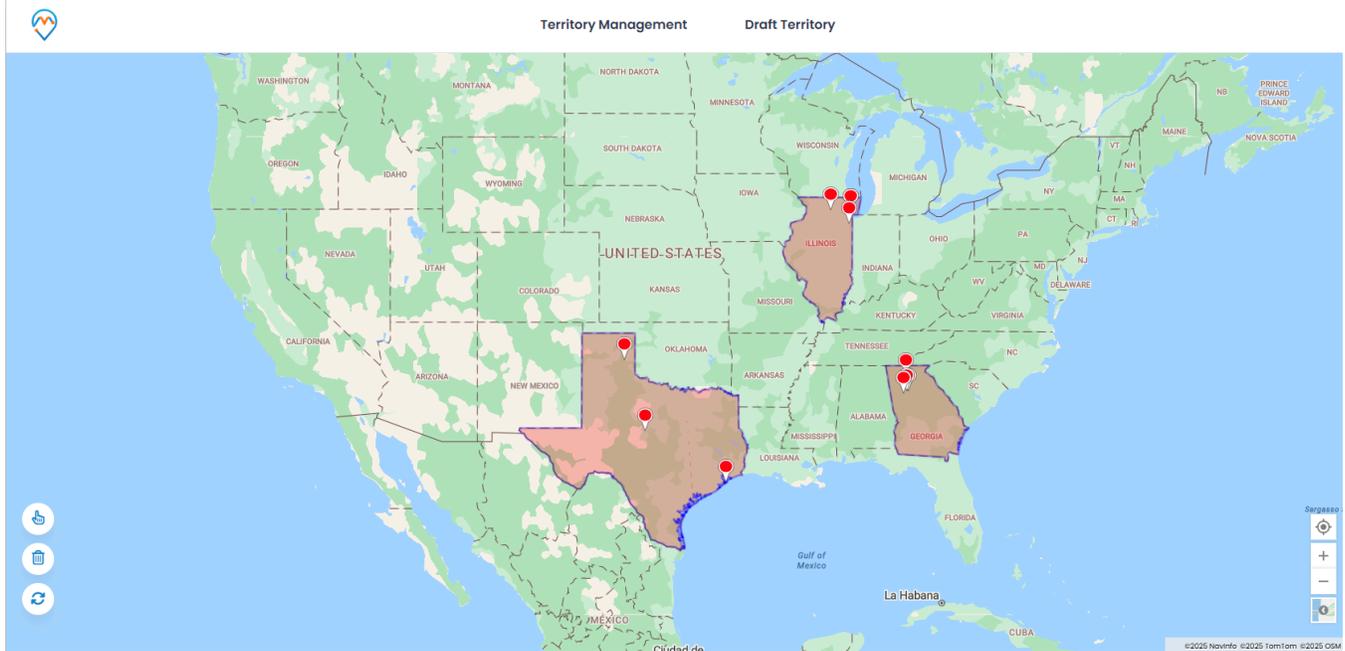
By Region

Region:

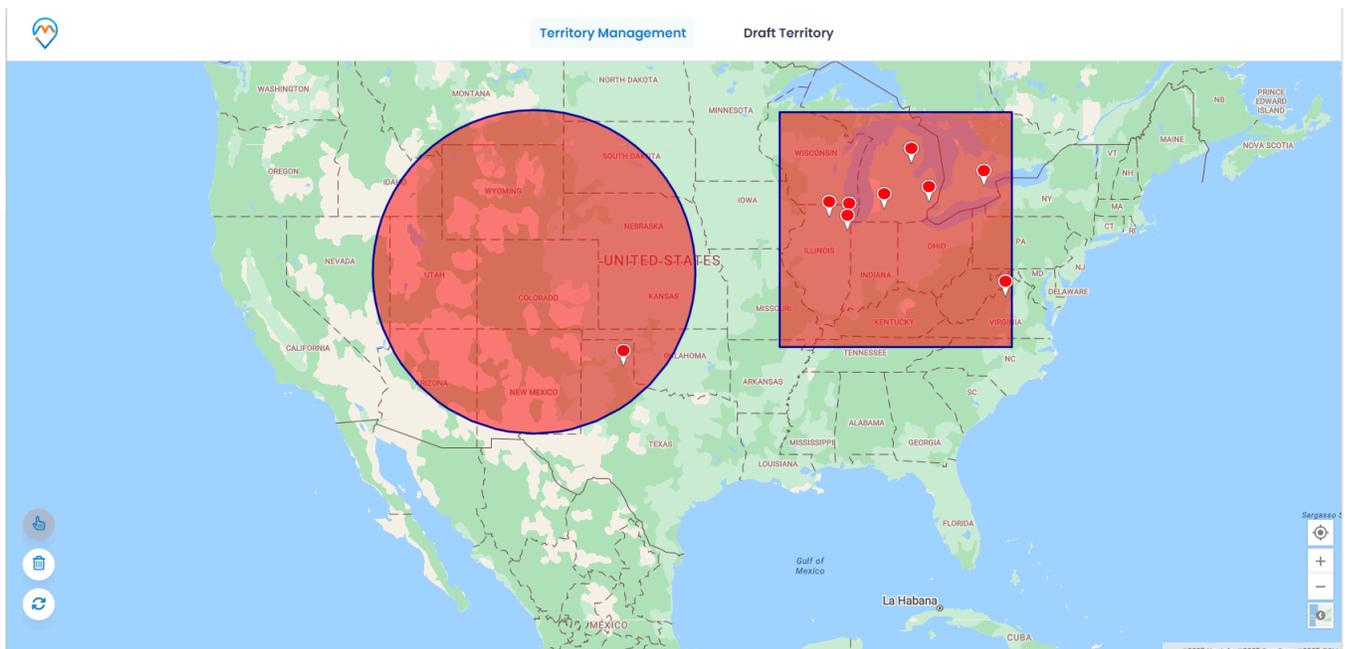
State

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.

Territory Management ✕

Search Options:
 By Territory ▼

Territory:
 2 selected ▼

- colorado
- georgia ✓
- Maahemdabad
- new prox terr
- texas ✓
- TPPP

Preview 0.5

Border Width 3

Opacity 0.5

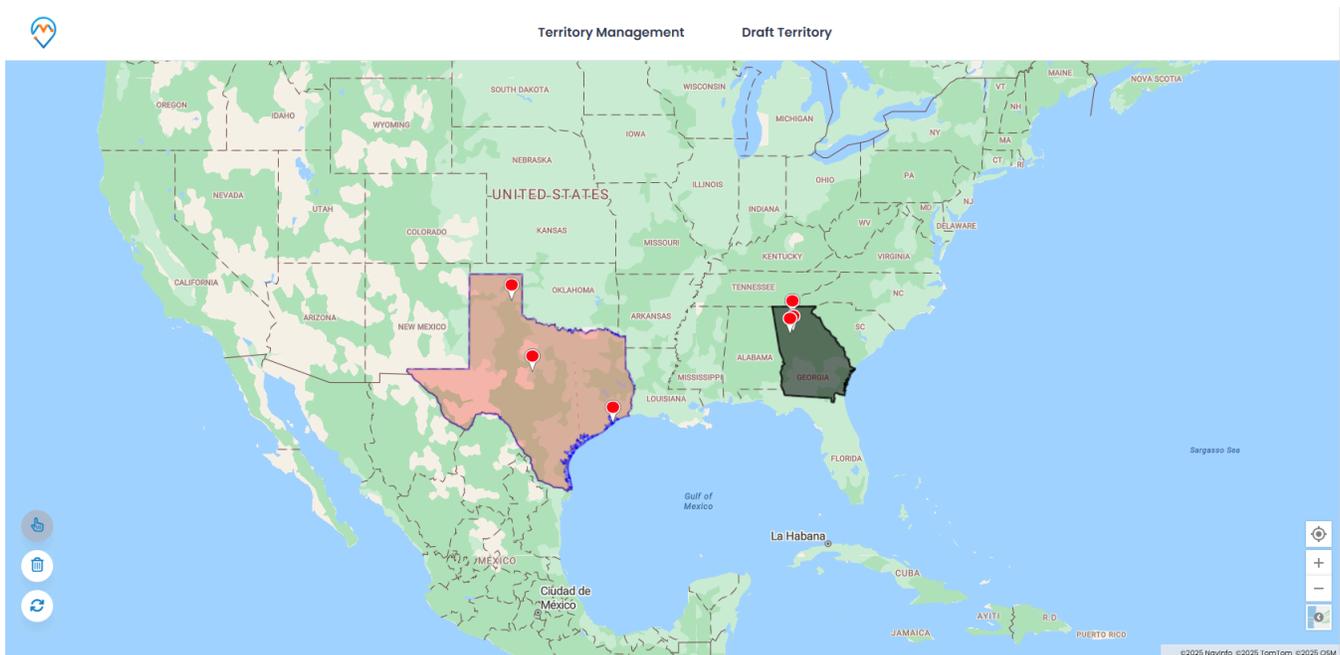
Select Entity Cluster

● Accounts All Accounts ✕

+ Add Legend

By user/team

Plot



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 Management
Draft Territory

Search Options:

By Proximity ▼

Distance Time

70 85 99

Note : Please enter a value between 1 to 99.

Kilometers ▼

Texas, United States

Note :
Search location manually or for precise location Right click on the map to "Add to Location".

Select Entity Cluster

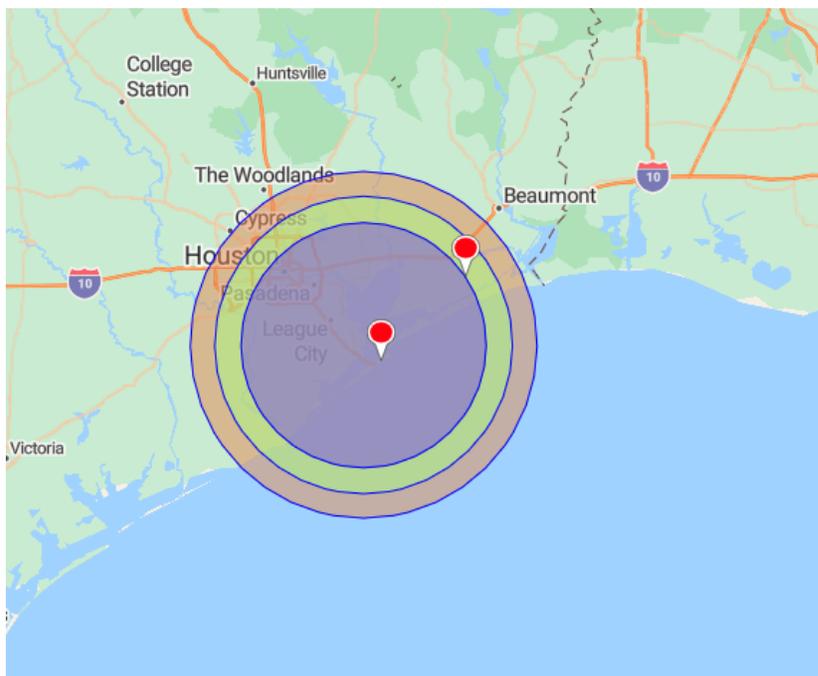
📍 Accounts ▼ All Accounts ▼ ✕

[+Add Legend](#)

By user/team

Plot

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:

By Proximity

Distance Time

55

Note: Please enter a value(in min) between 1 to 60.

texas, united states

Note: Search location manually or for precise location Right click on the map to "Add to Location".

Select Entity

Cluster



Accounts

All Accounts

[+ Add Legend](#)

By user/team

Plot

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 :

Territory Management

Search Options:

By File

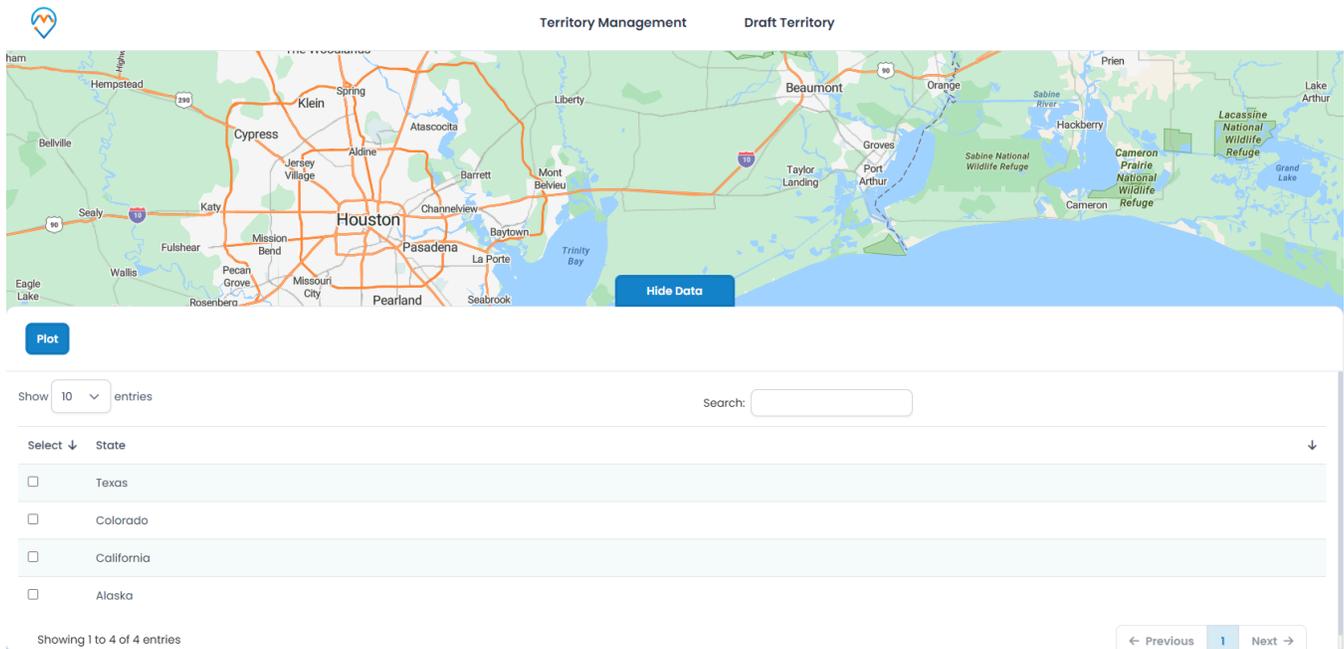
Select File: 1

Sample (5).csv

Upload

[Sample CSV File](#)

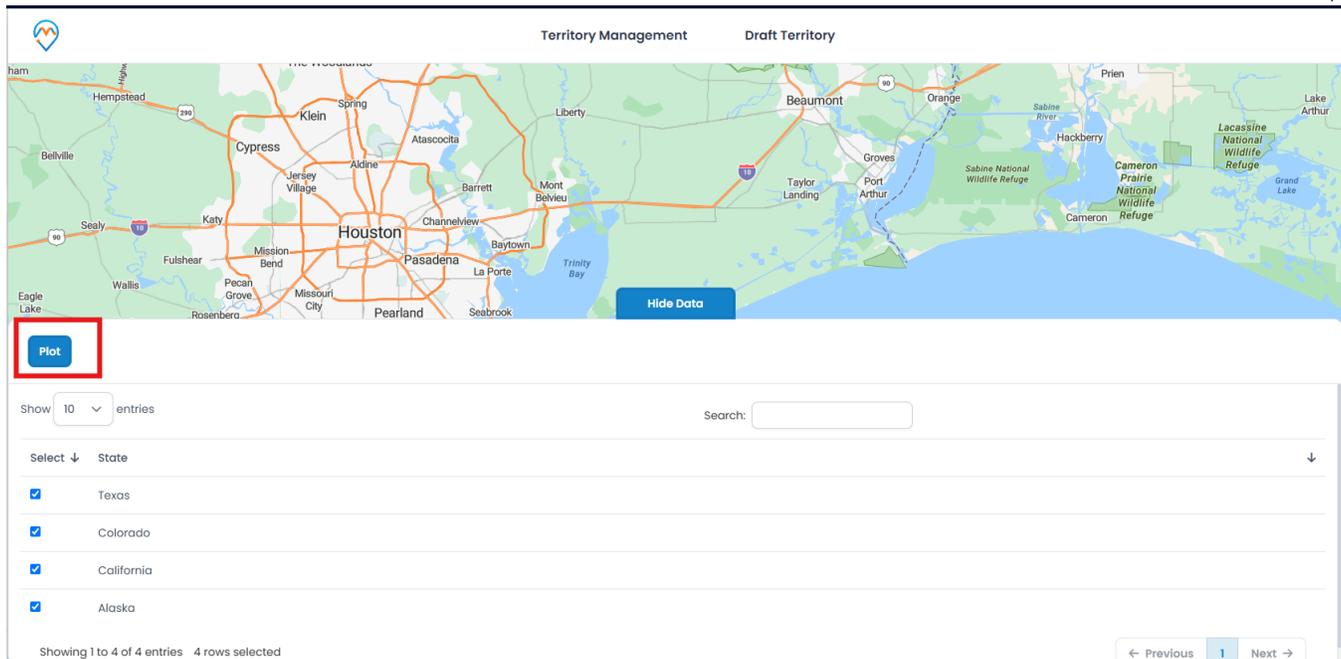
According to the data grid will get appeared



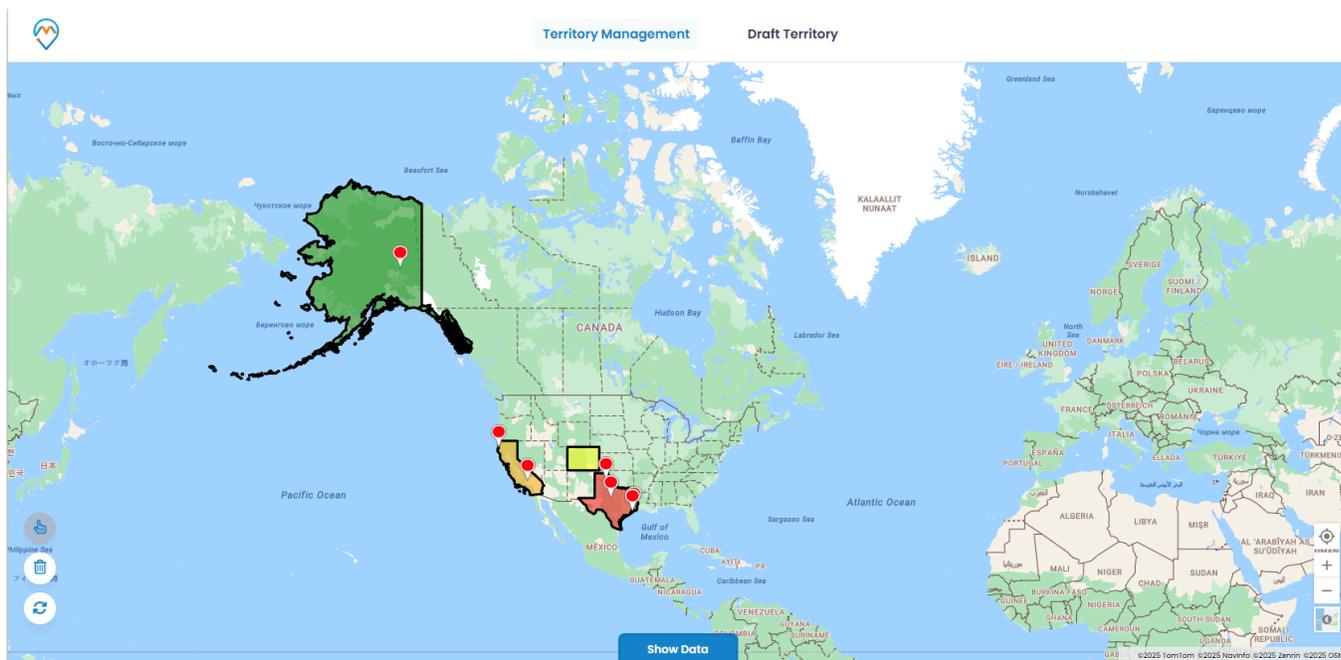
The screenshot displays the 'Territory Management' interface. At the top, there are tabs for 'Territory Management' and 'Draft Territory'. Below the tabs is a map of the Houston area with various territories outlined in orange. A 'Plot' button is visible on the left side of the map. Below the map, there is a data grid with the following elements:

- A 'Show' dropdown menu set to '10' entries.
- A search input field labeled 'Search:'.
- A 'Select' dropdown menu set to 'State'.
- A list of states with checkboxes: Texas, Colorado, California, and Alaska.
- A pagination bar at the bottom showing 'Showing 1 to 4 of 4 entries' and navigation buttons for 'Previous', '1', and 'Next'.

Here, select the required region and click on plot.

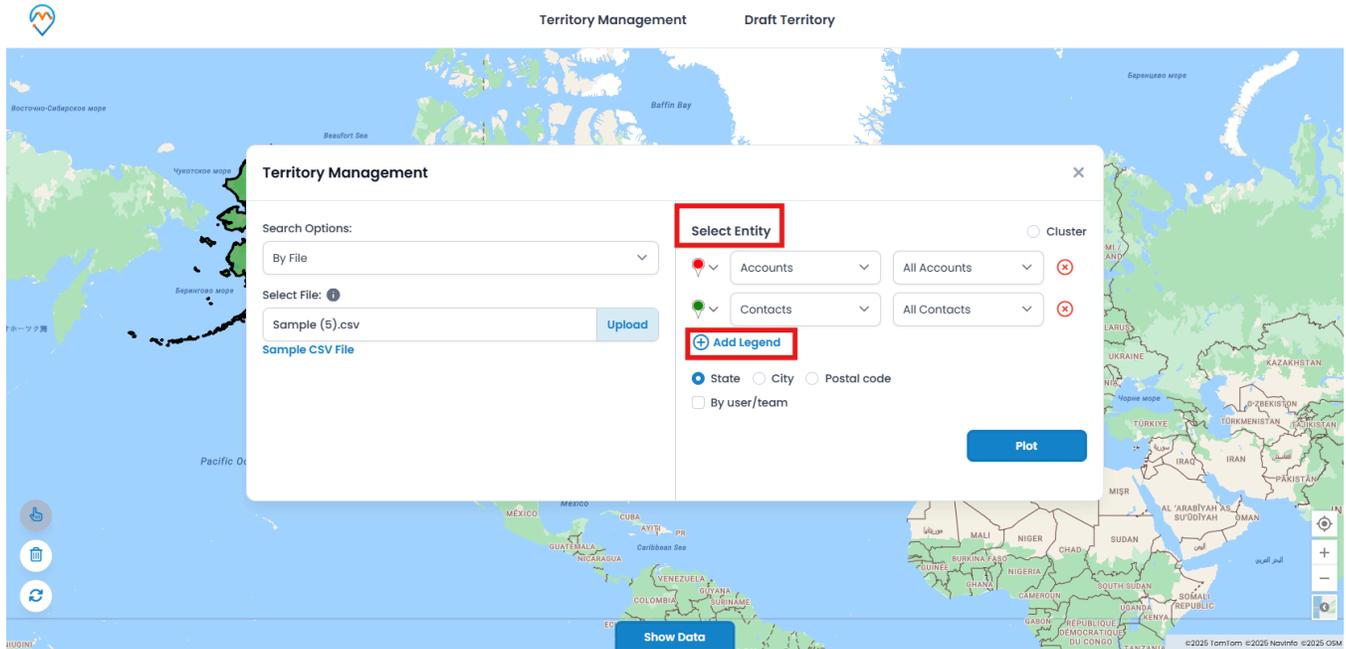


The territory will be plotted according to the regions selected from the grid.



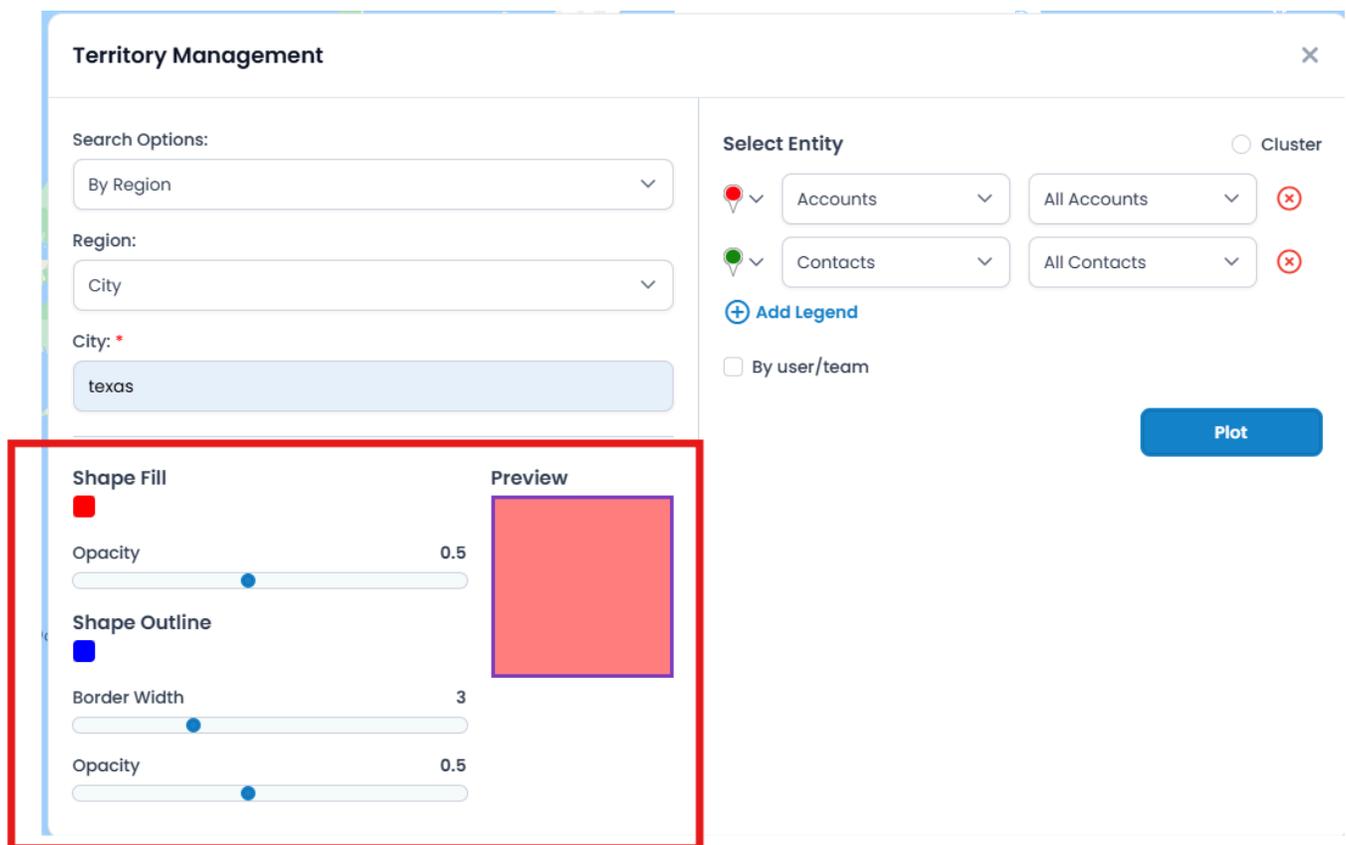
To the right, there are various entities mentioned from which the user has to select one. After selecting the Entity select the Entity view.

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



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.

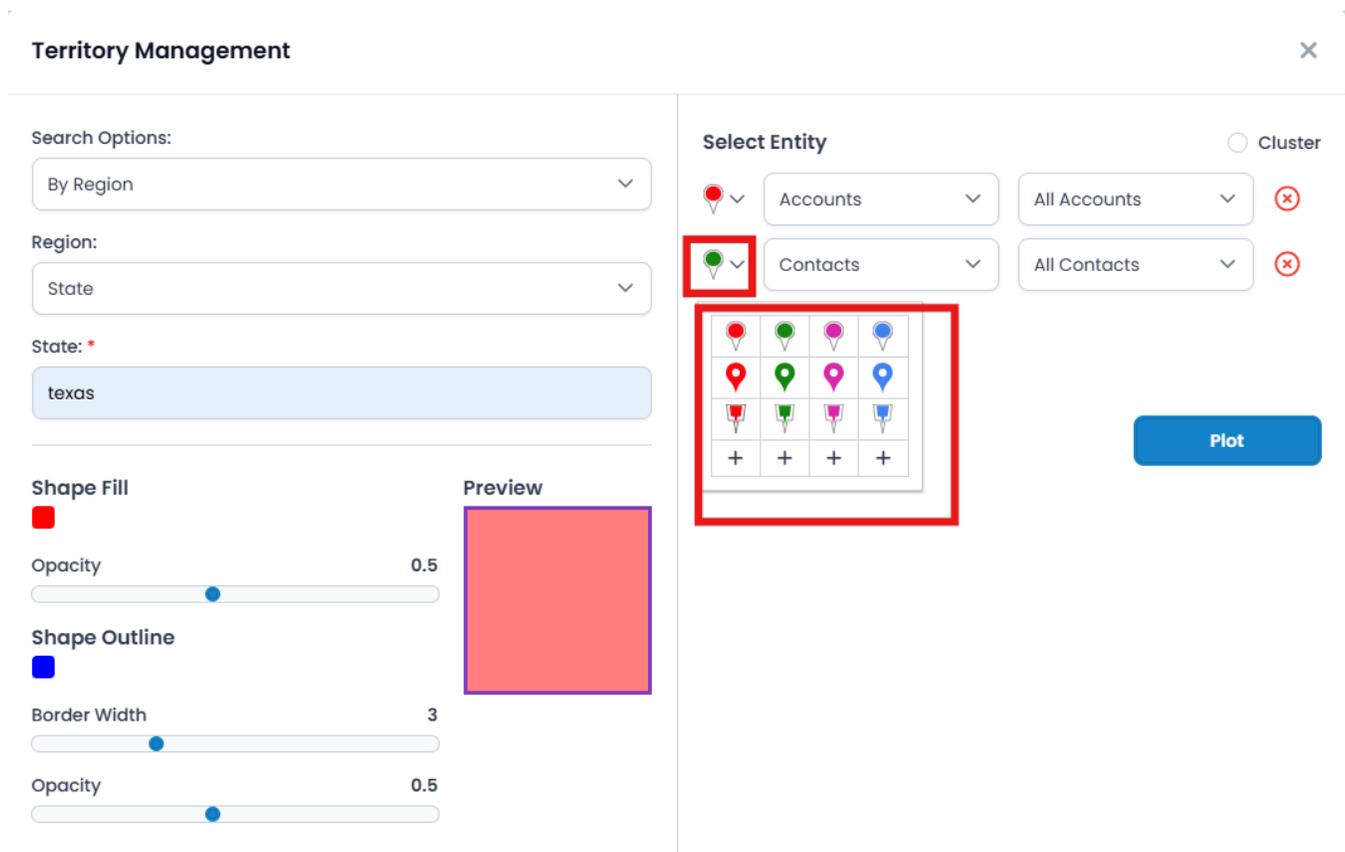
Also the color, width and opacity of the outline of the territory can be selected through Shape Outline, Border Width and Opacity respectively. In the Preview section the color that has been selected is displayed.



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:
By Region ▼

Region:
State ▼

State: *
texas

Shape Fill
■
Opacity 0.5

Shape Outline
■
Border Width 3
Opacity 0.5

Preview


Select Entity Cluster

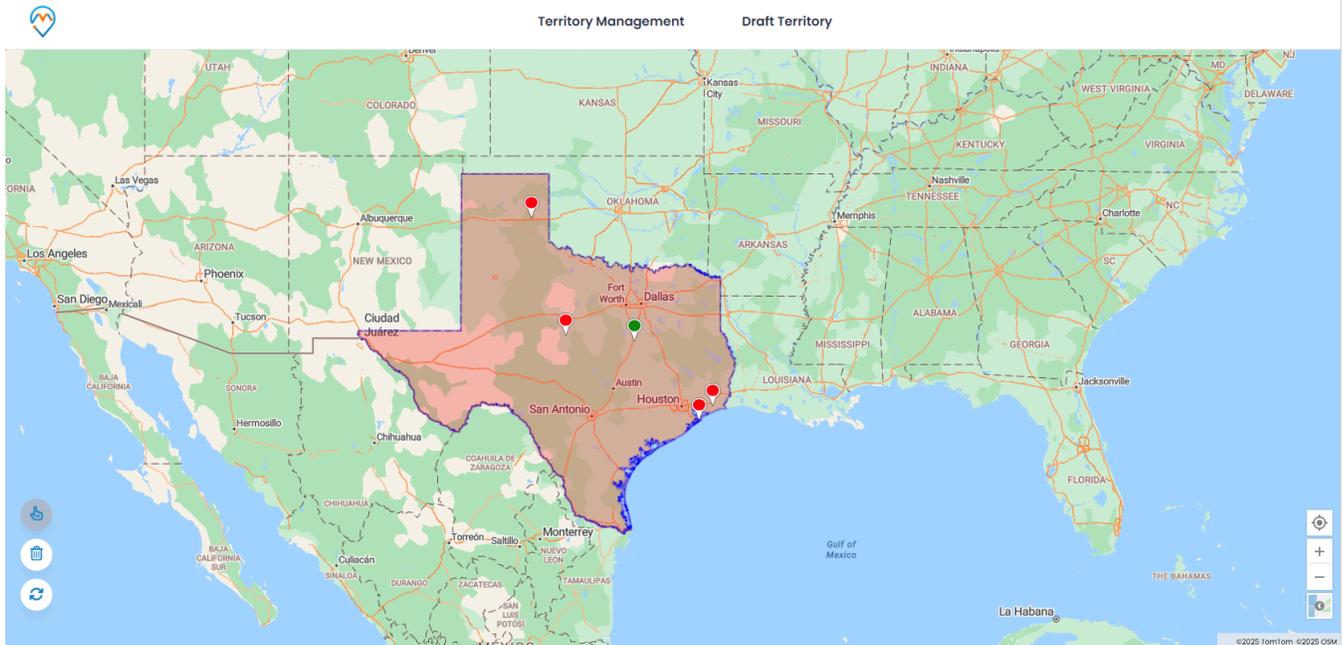
📍 ▼ Accounts ▼ All Accounts ▼ ✕

📍 ▼ Contacts ▼ All Contacts ▼ ✕

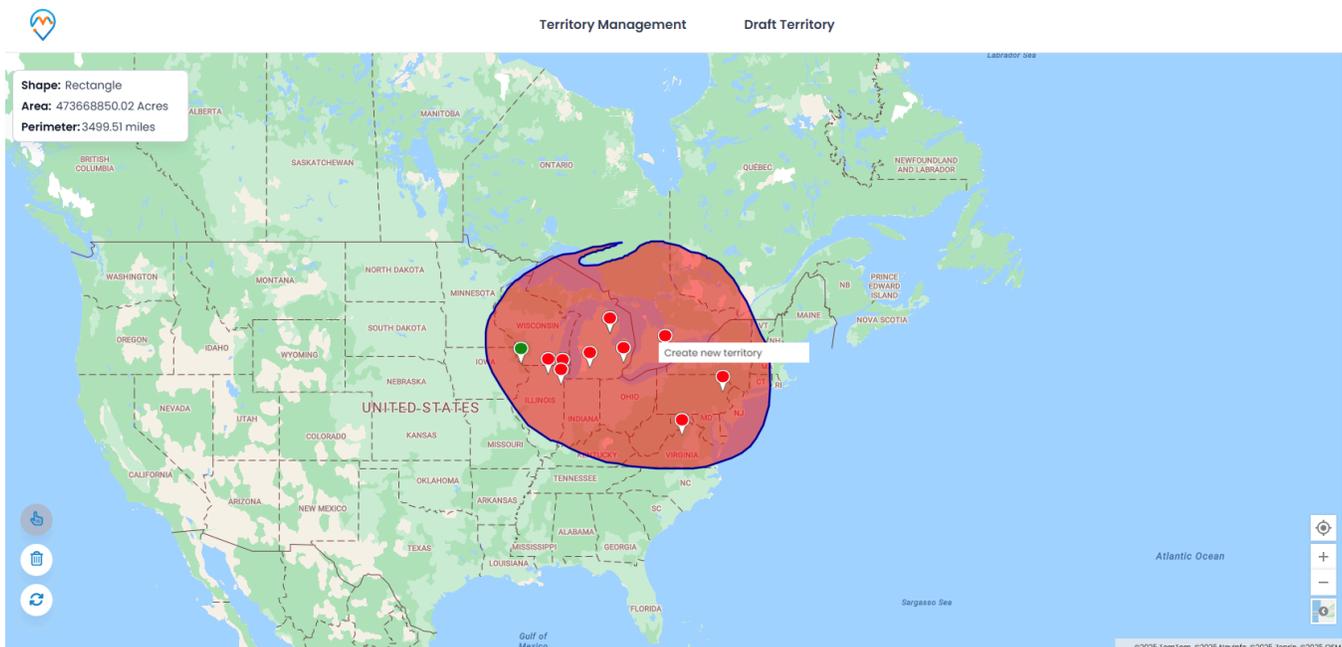
📍	📍	📍	📍
📍	📍	📍	📍
📍	📍	📍	📍
+	+	+	+

Plot

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.  - This icon is to select the particular territory.  - 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

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 territory ×

Add to parent territory

Combine with existing territory

Create new territory

Texas region

Select Manager

Steve Adams ▼

Save **Save As Draft**

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

+ Create new territory ×

Add to parent territory

Combine with existing territory

Create new territory

Texas region

Select Manager

Steve Adams ▼

Save **Save As Draft**

Draft Territories

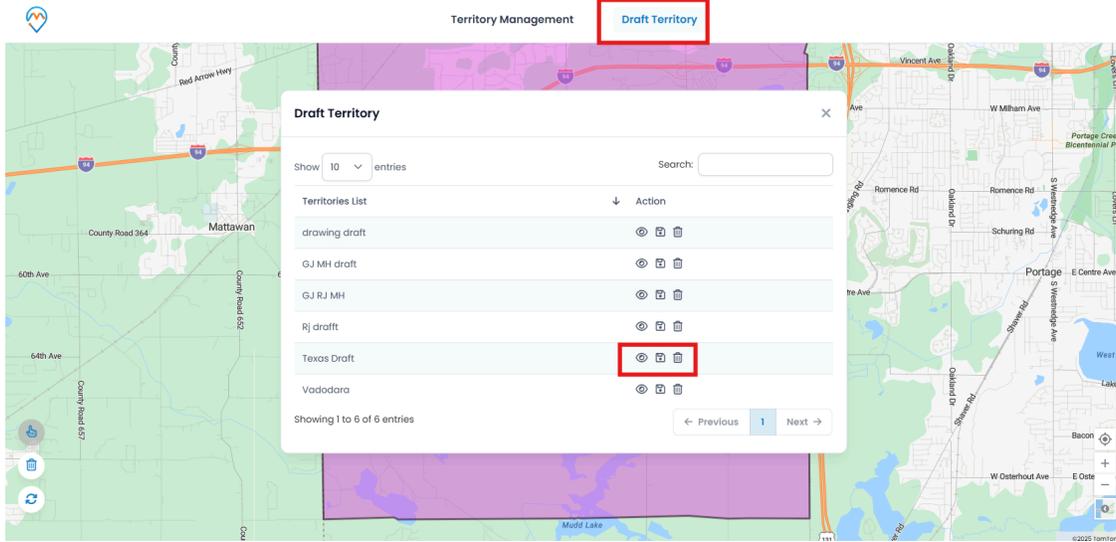
While creating a territory you are provided with two options either to directly save or to save as a draft. Those territories that are saved as drafts are listed in this section. The list contains two columns :

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.

Territory Management **Draft Territory**



Draft Territory [Close]

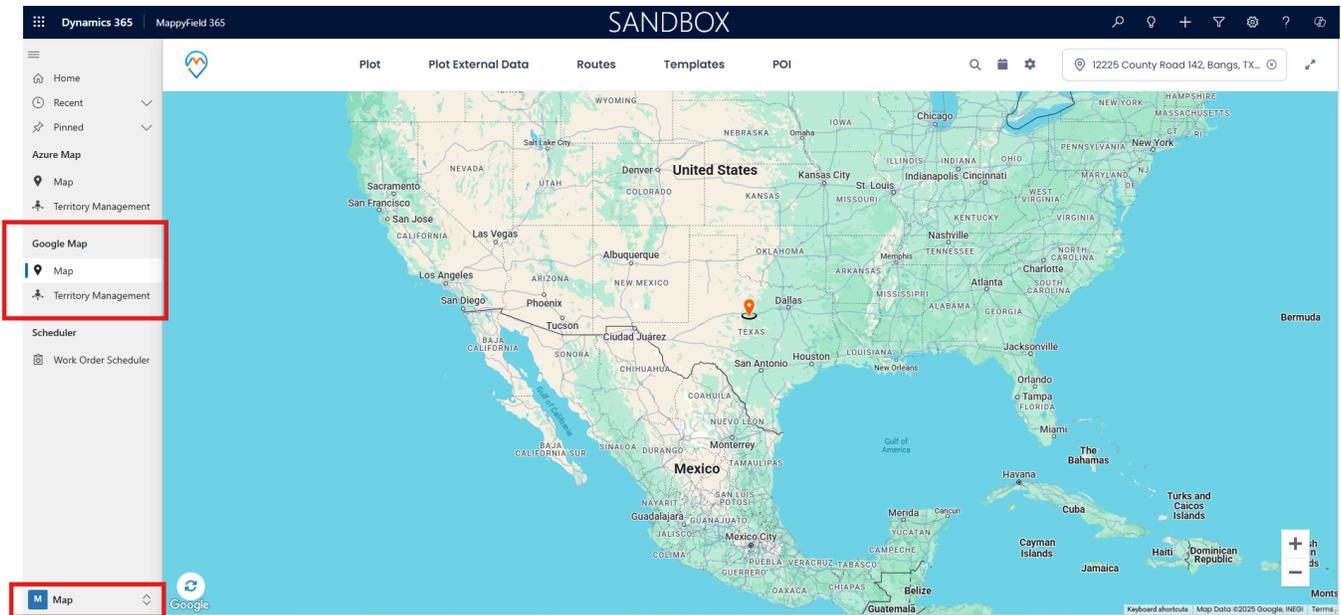
Show 10 entries Search: [Search Box]

Territories List	Action
drawing draft	[Eye] [Trash]
GJ MH draft	[Eye] [Trash]
GJ RJ MH	[Eye] [Trash]
Rj drafft	[Eye] [Trash]
Texas Draft	[Eye] [Trash]
Vadodara	[Eye] [Trash]

Showing 1 to 6 of 6 entries

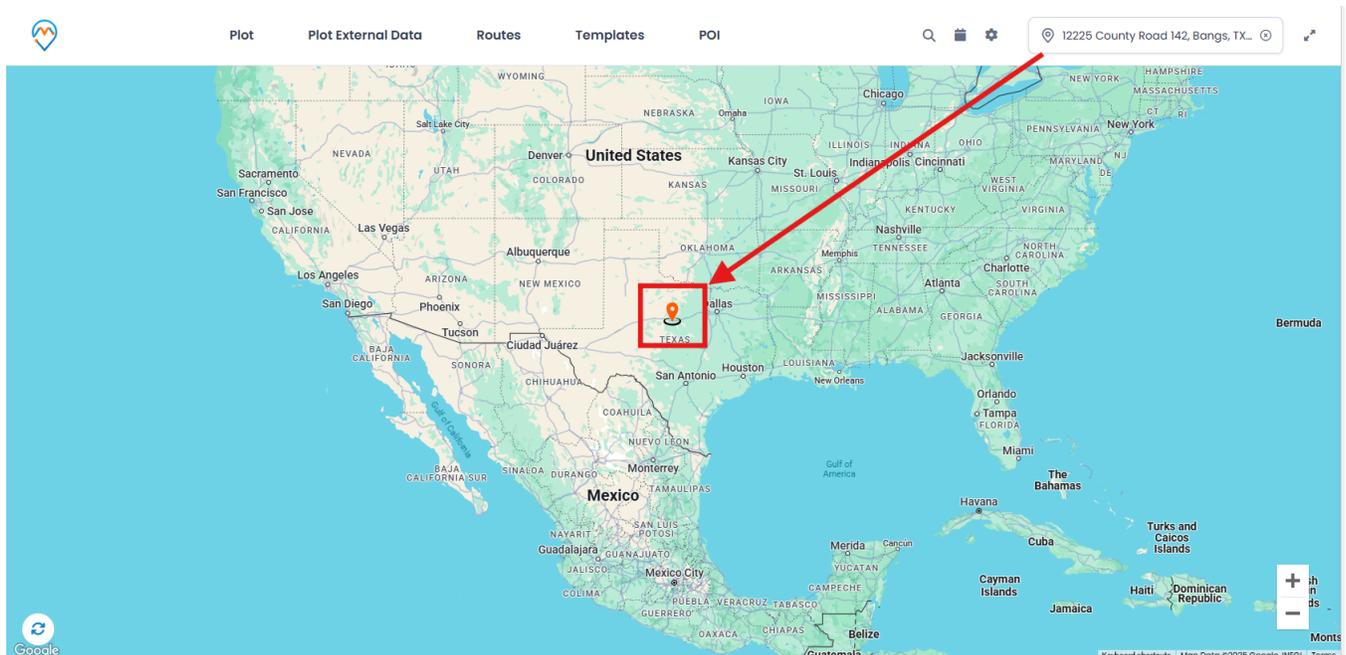
← Previous 1 Next →

Google Map

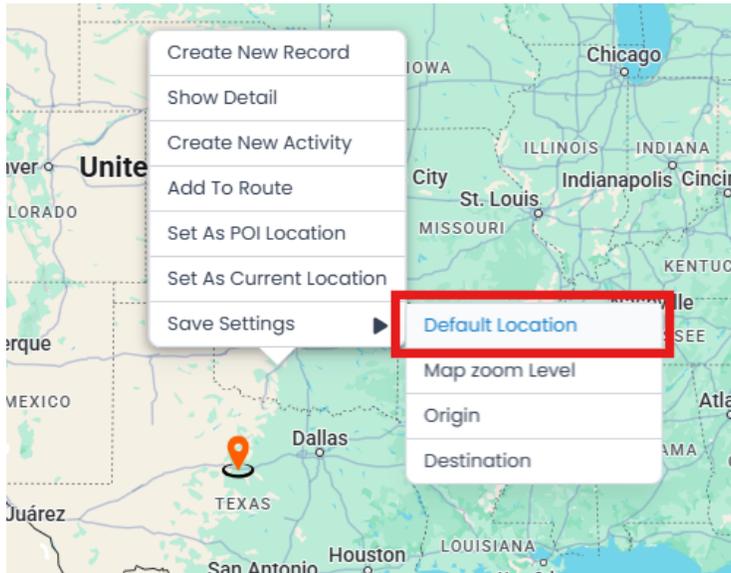


Default Location

- You will get the default location with the pin  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**.

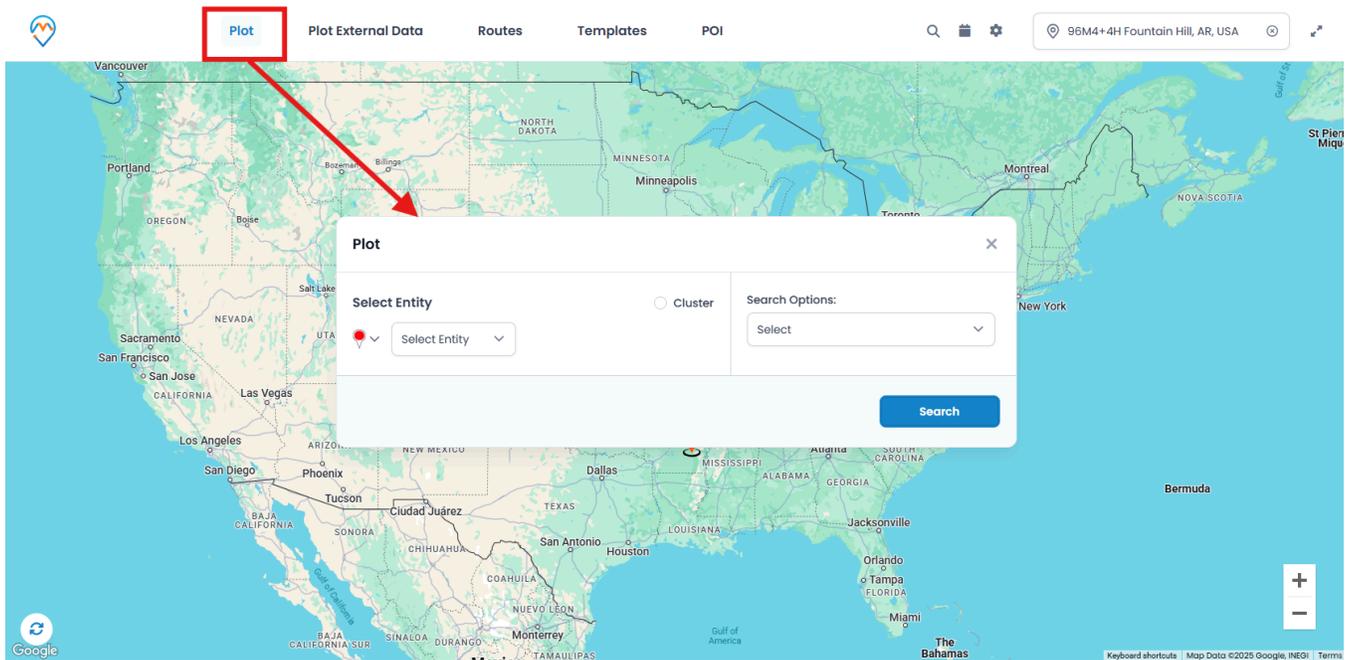


- By clicking on the 'Default Location', the pushpin  the default location will be changed **with a new** address on the map.

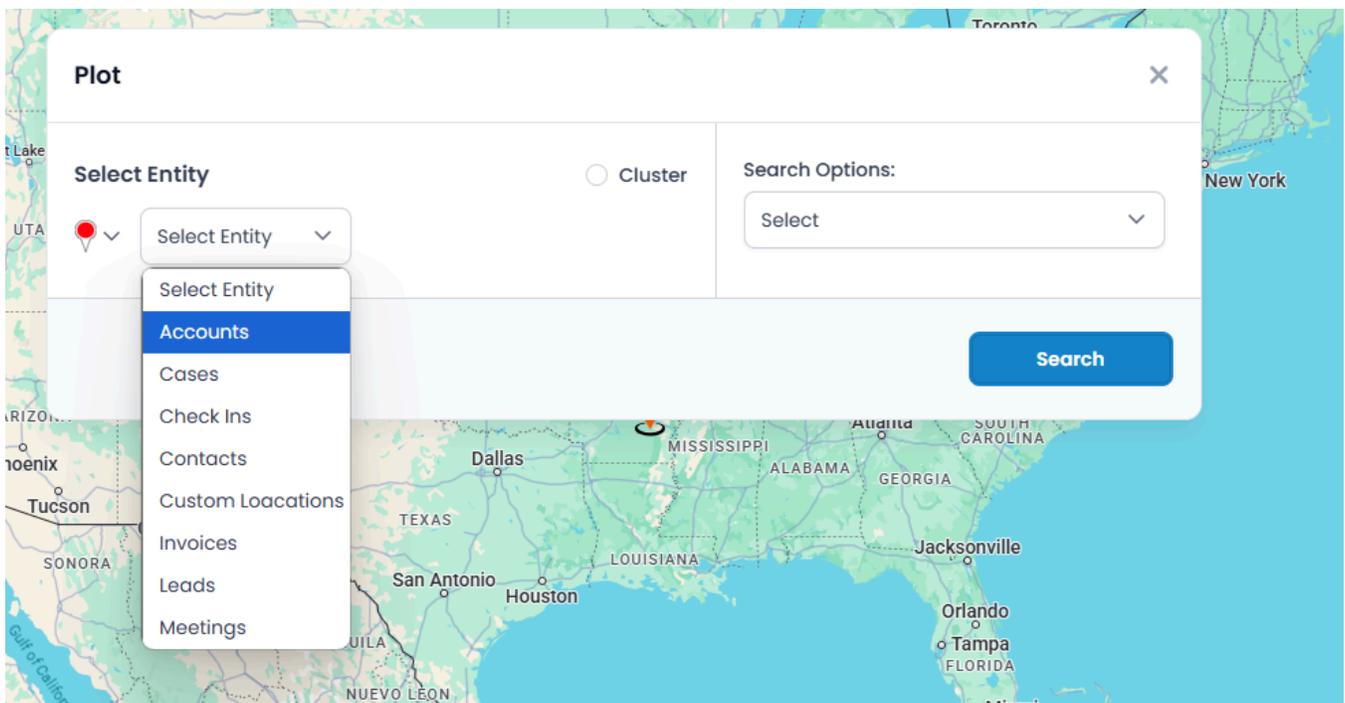
Plot the records on Map

Select Entity

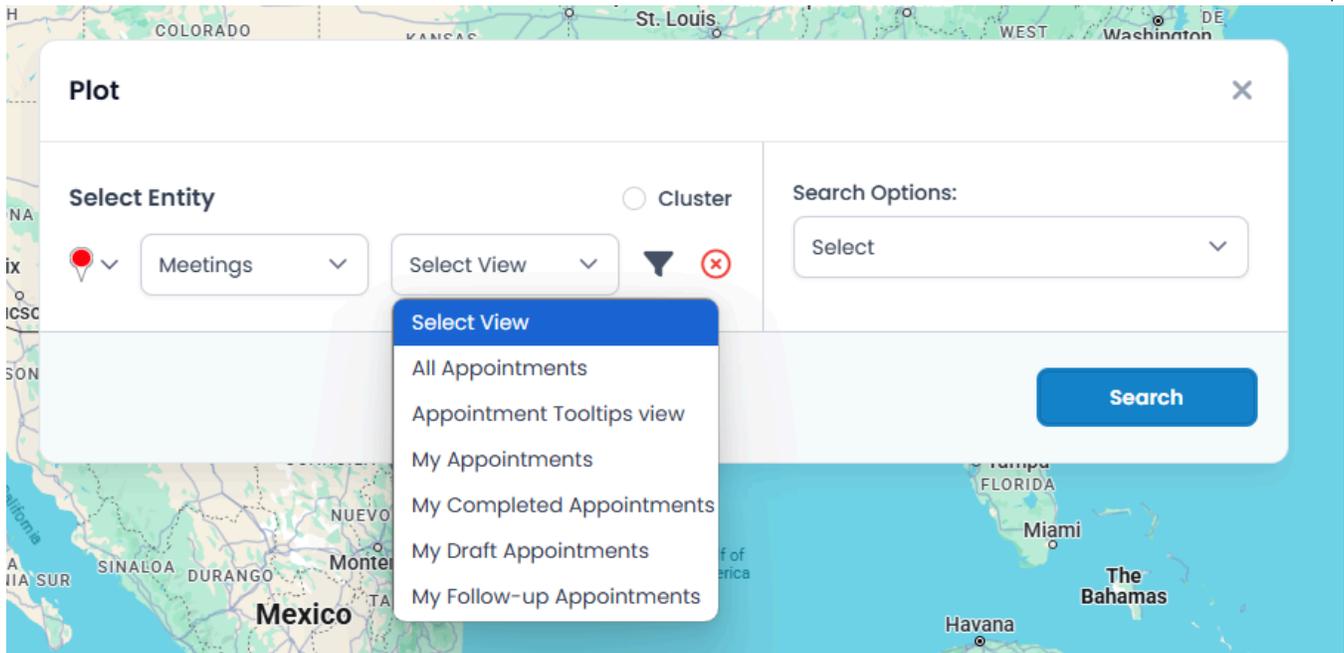
- By clicking on the **Plot**, you can plot the multiple records by selecting the different entities.



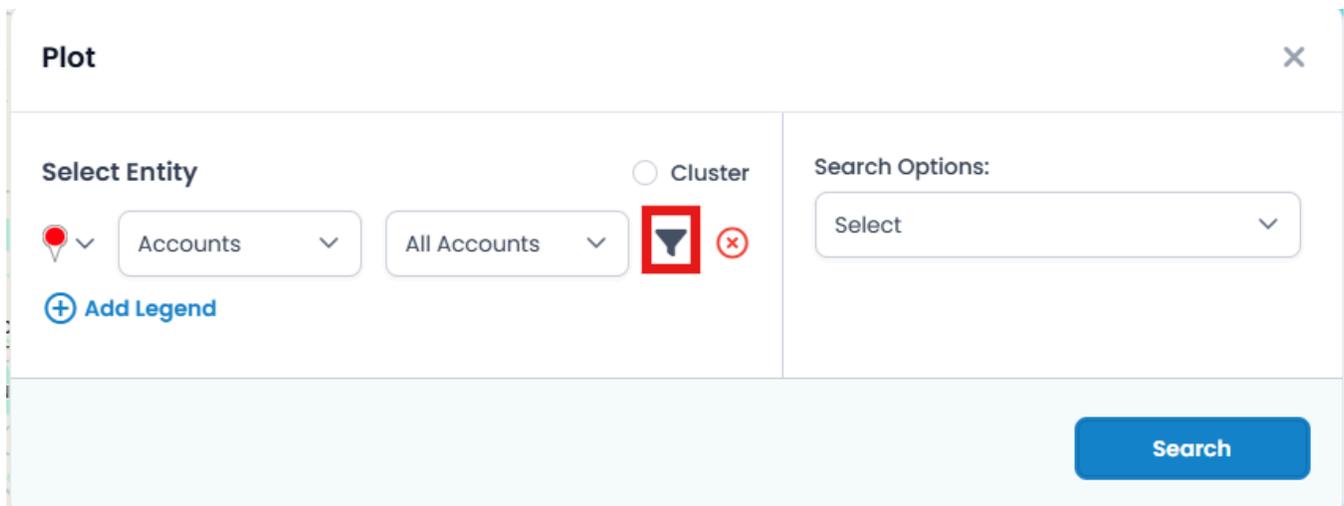
- First, select **Entity** from the 'Select Entity' dropdown option. You will get the dropdown list of entities as per mapped in  **Entity Mappings** configuration.



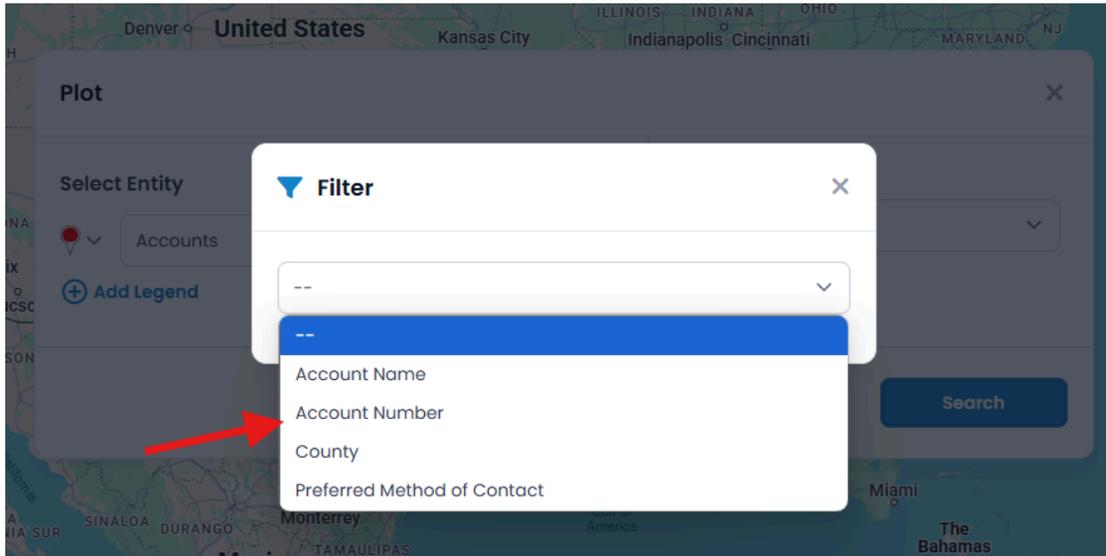
- Select **View** from the 'Select Entity' dropdown option.



- 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.

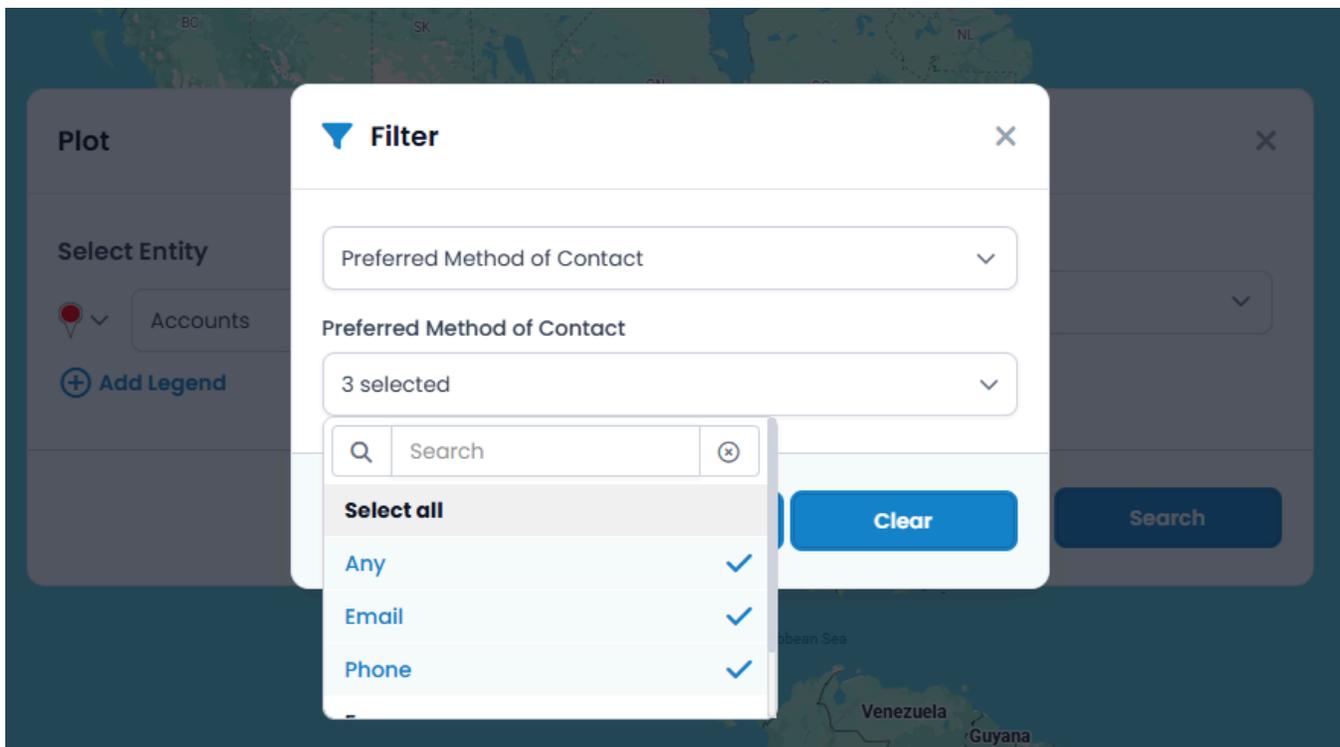


- By clicking on the  'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.

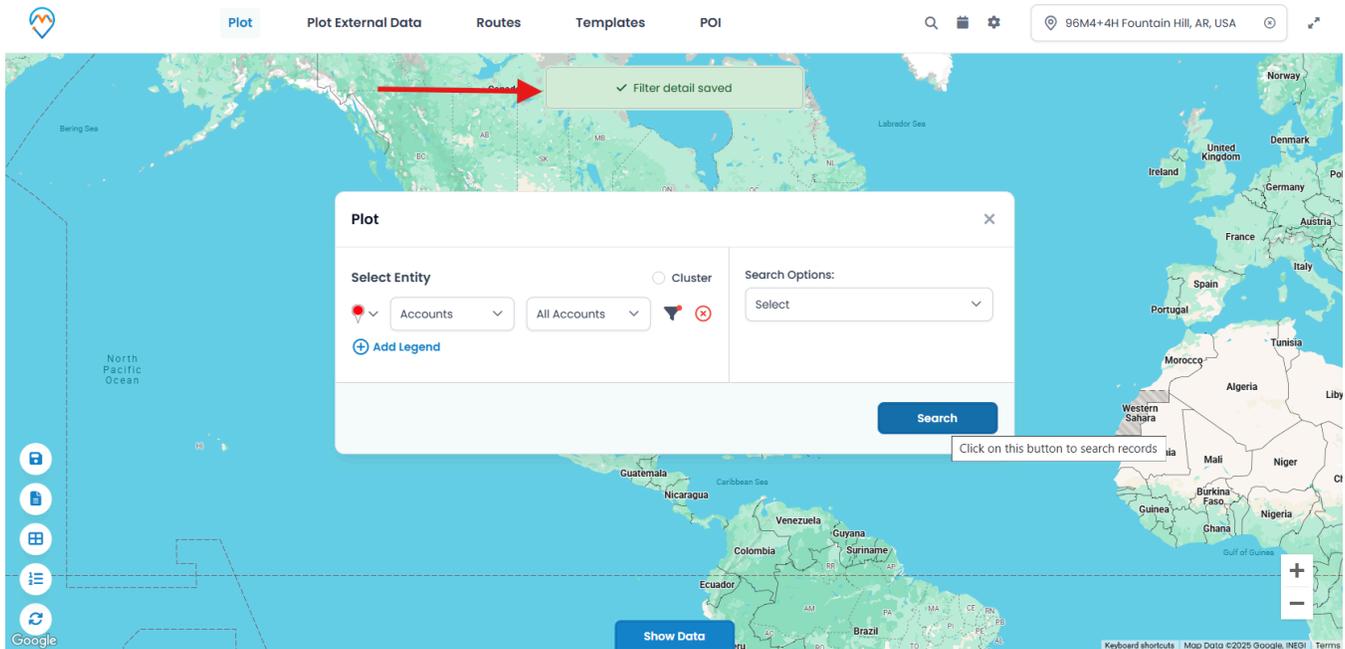


Note: You can plot the records on the map based on the attribute selection that are configured from the option of the 'Entity Mappings' in the Data Filter Attributes option.

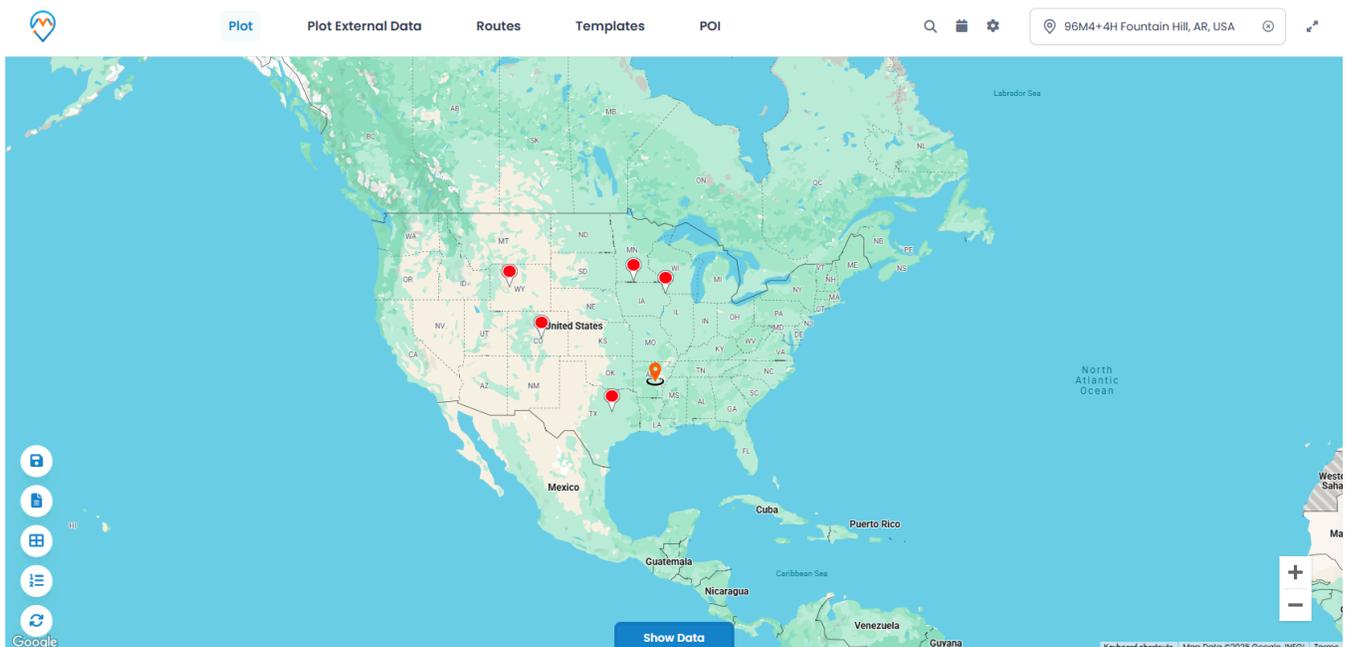
- Once you have selected the Attribute, you need to insert its value. After selecting the attribute and inserting its relevant value to filter the records, click on the **Save** button.



- By clicking on the  'Filter' icon, a popup will open to select the attribute of Account entity to plot the records based on the attribute selection.

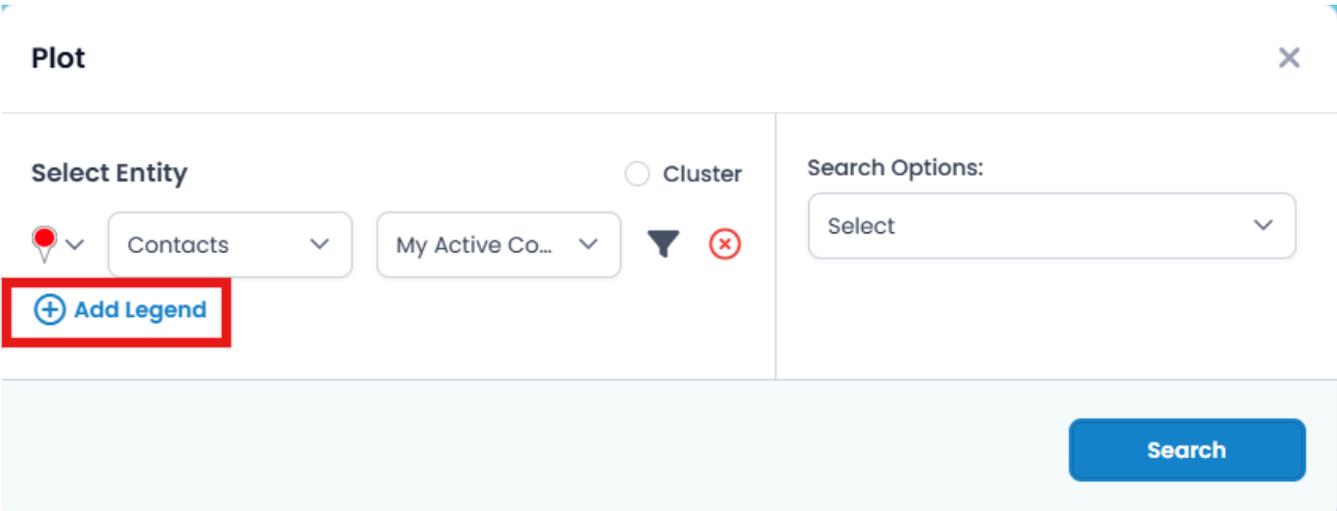


- By using the custom filters, the DynamicsCRM users can plot records between the dates or plot records with the specific status as per configuration in the **Data Filter Attributes** option from Entity Mappings.
- Now, click on **Search** button to plot and view the records of the selected entity **on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



- 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

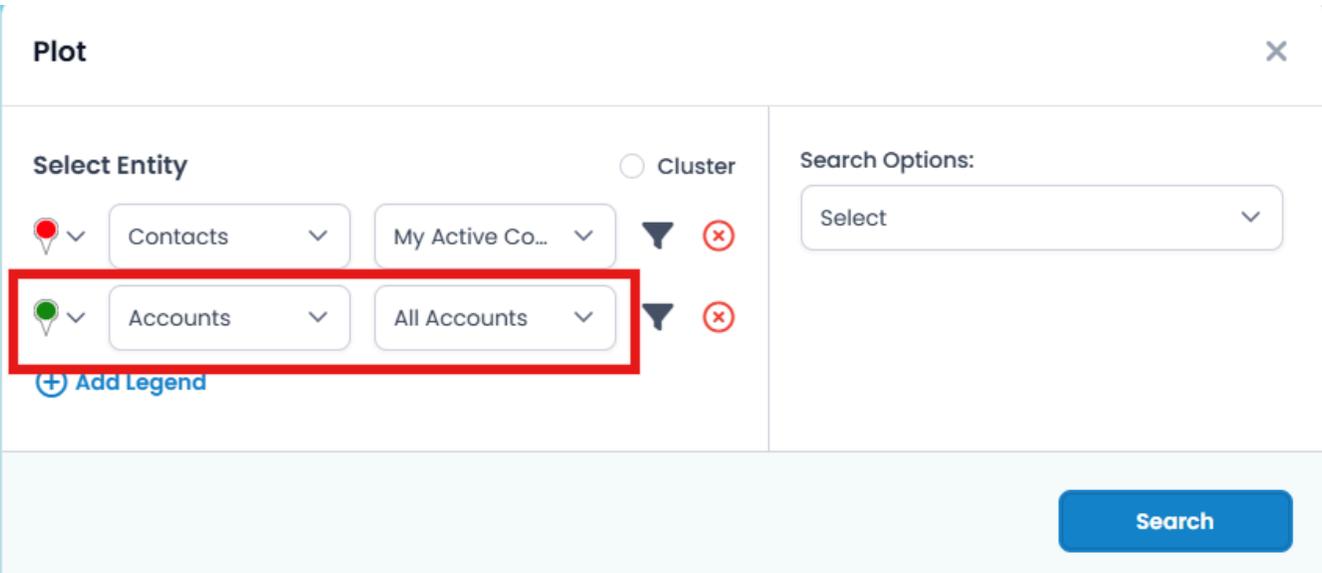
📍
Contacts
My Active Co...
▼
⊗

+ Add Legend

Search Options:
Select ▼

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...
▼
⊗

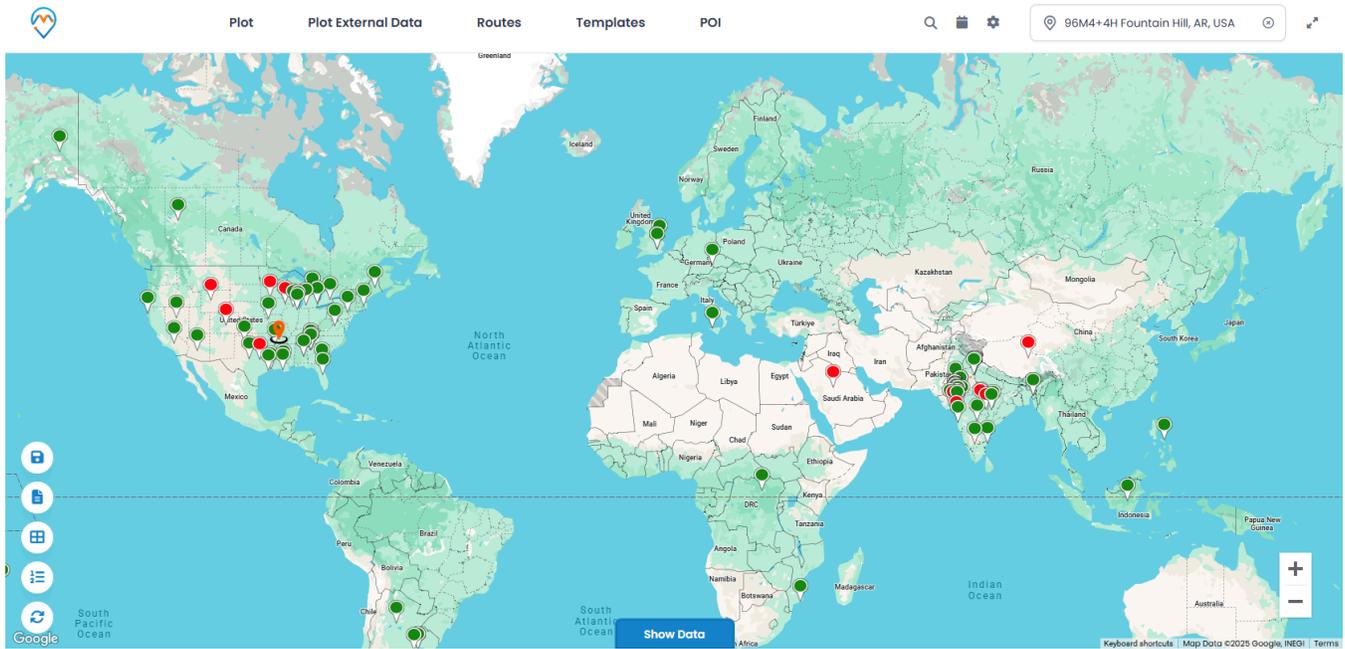
📍
Accounts
All Accounts
▼
⊗

+ Add Legend

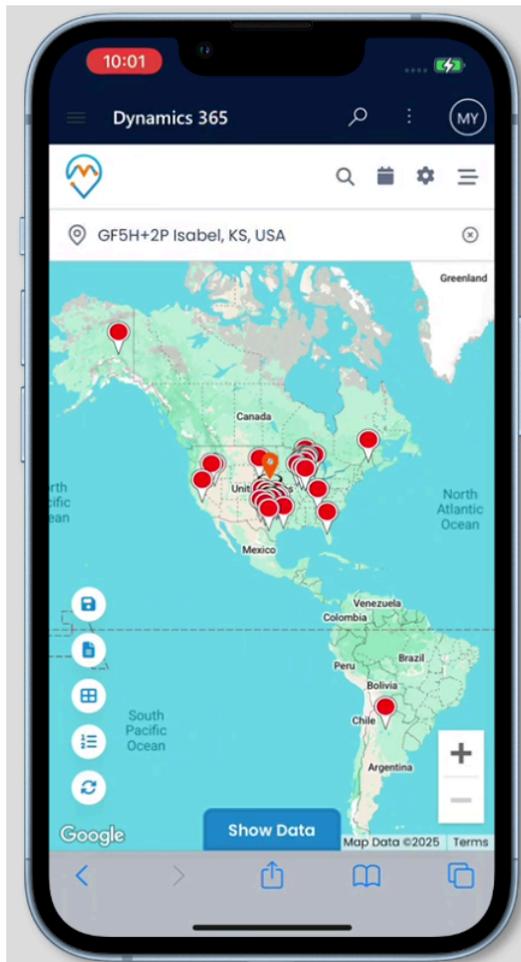
Search Options:
Select ▼

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 📍.



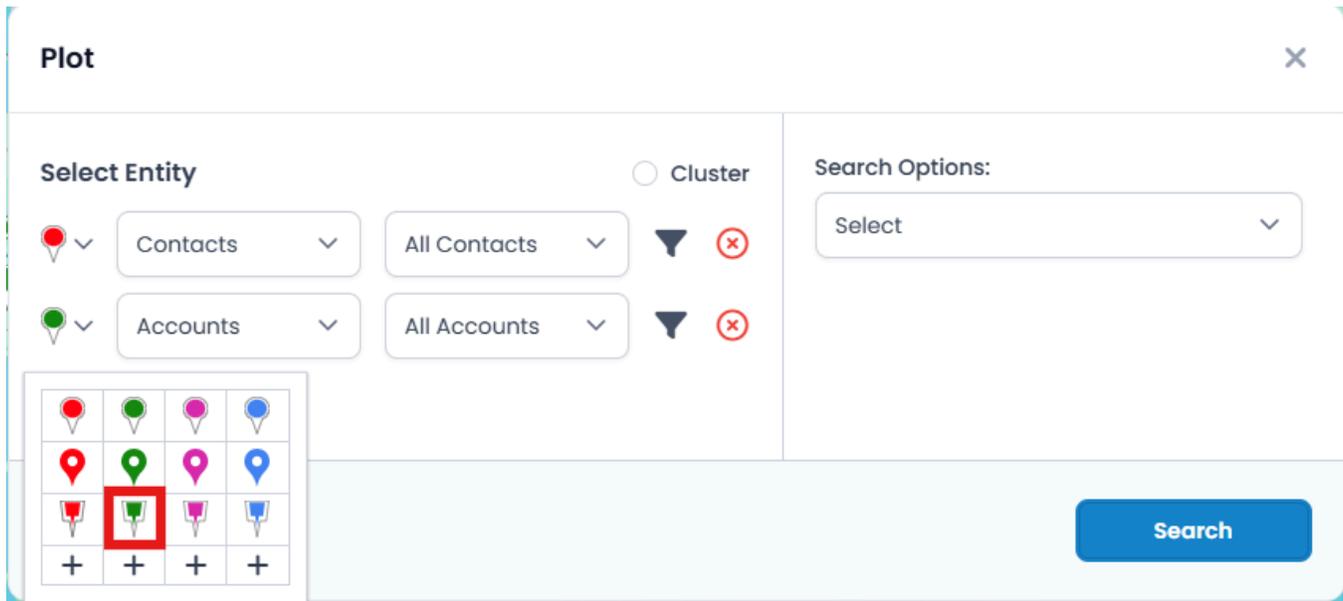
- If entities like Account, Contact or Lead are mapped under the 'Entity Mappings' configuration, only then you can select those entities and plot the records on the map.



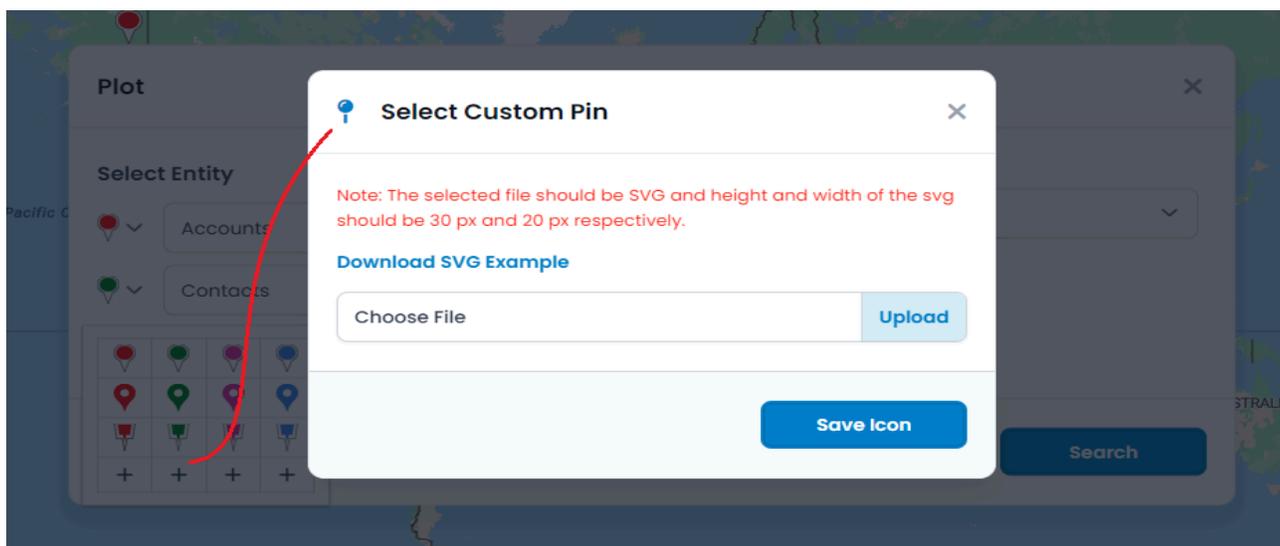
The Sales Reps/Executive (DynamicsCRM Users) can also access the MappyField 3365 from the mobile/tab.

Pin selection for records

- Every time when you add a new entity the pin will be added with a different color.
- Multiple pin 📍 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 📍 of any entity. Select different pins for the multiple entities to differentiate the records on the map.



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



Cluster Map Records

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

Plot ✕

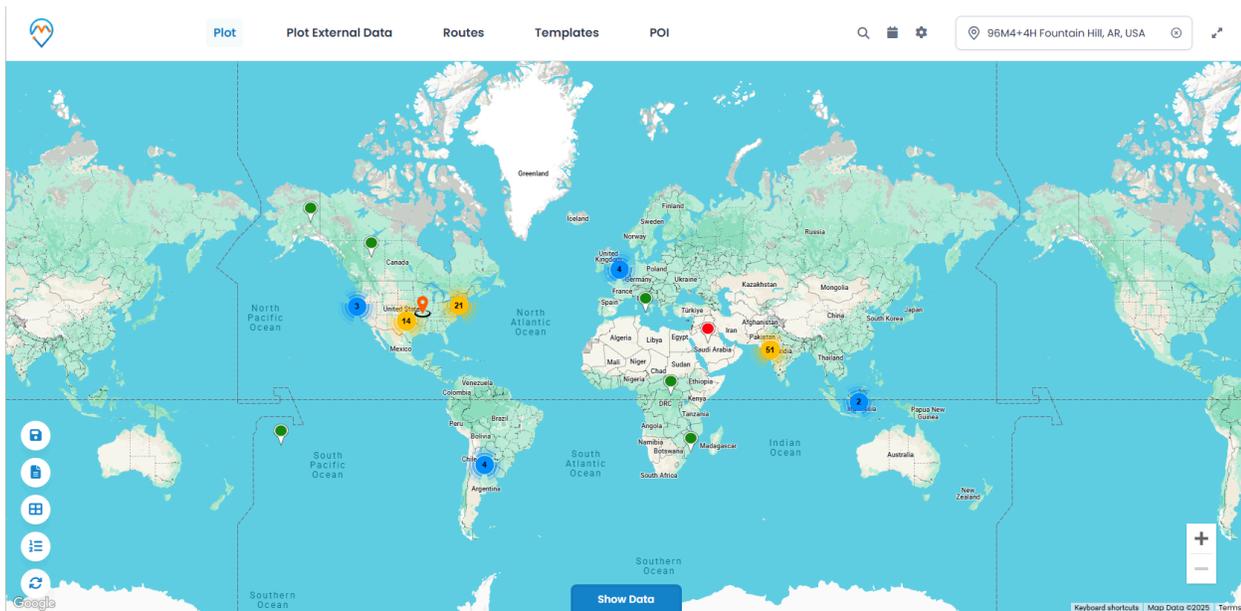
Select Entity Cluster Search Options:

📍 Accounts ▼ All Accounts ▼ 🔍 ✕ Select ▼

+ Add Legend

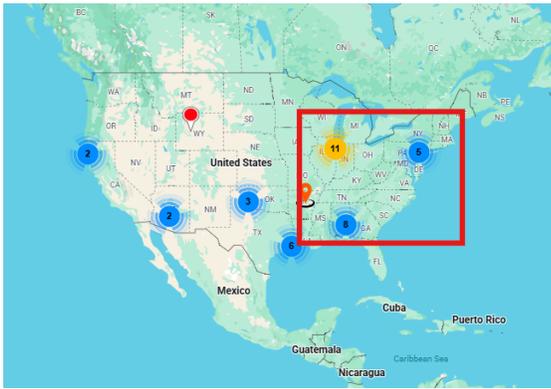
Search

- 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.

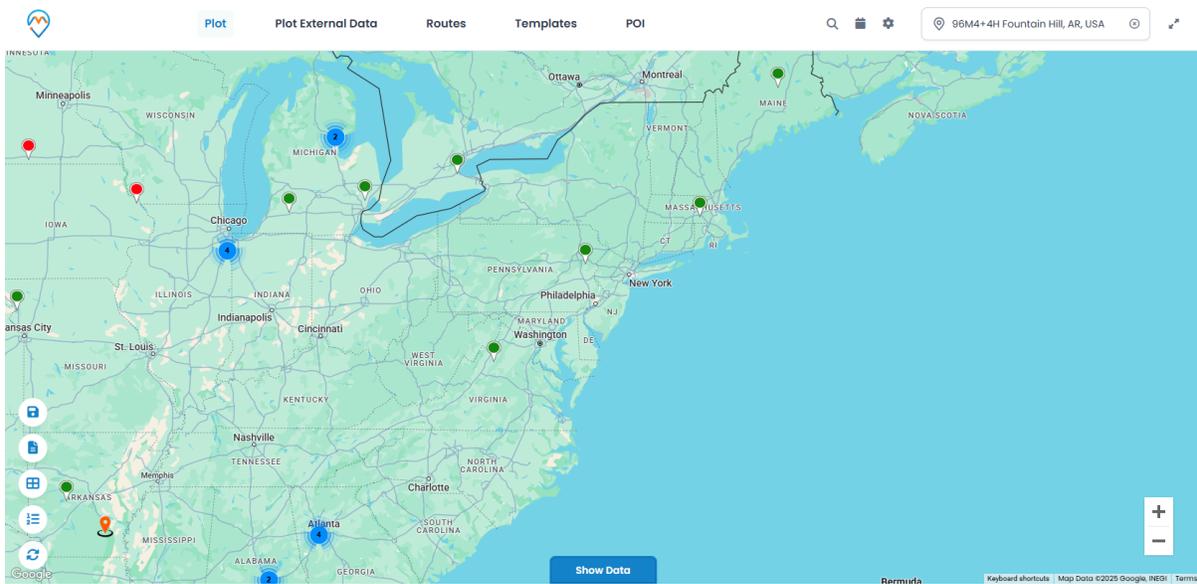


Note:

- 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.

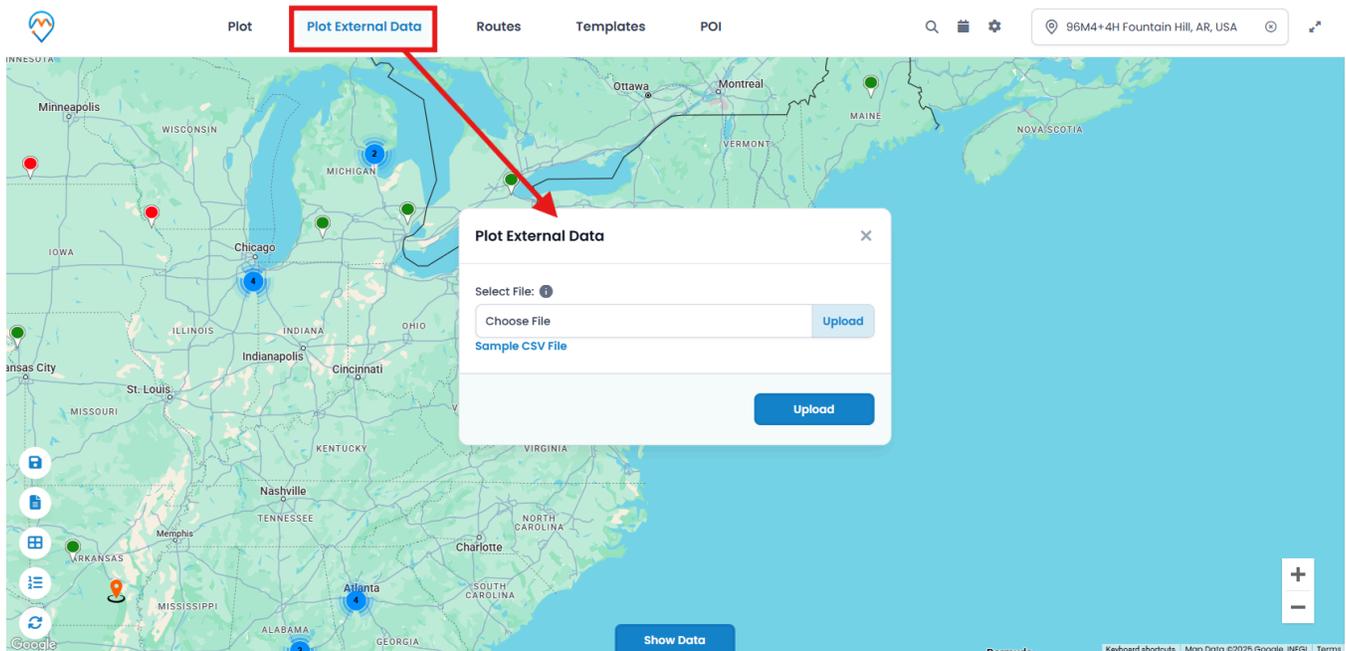


- On clicking any cluster (no. of groups), it will zoom in to the pins.

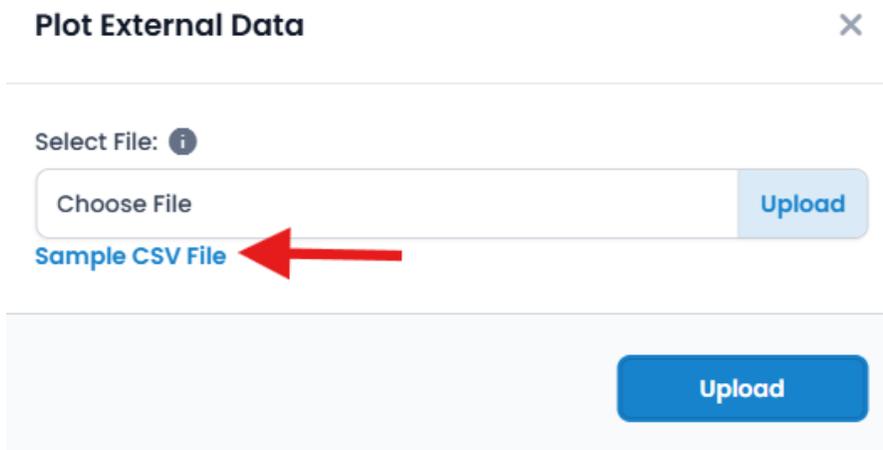


Plot External Data

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.



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	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Record Na	Latitude	Longitude	Street1	Street2	City	PostalCod	State	Country	Job type	Company	Education	Email	URL	Phone Nur	Status	
2	Darren Grc	39.87	-117.22	3200 S. Las Vegas Blv		Las Vegas	89109	NV	USA	Manager	Biztech	MCA	Test@gma	www.goo	7.57E+09	TRUE	
3	Adam Smit	45.36	-68.97	3309 Esperanza Cross		Austin	78758	TX	USA	Teach Lea	Biztech	MBA	Test@gma	www.goo	9.43E+09	FALSE	
4	Jack Carte	44.18	-84.5	3000 Bayport Dr		Tampa	330607	FL	United Sta	Senior Dev	Test	MCA	Test@gma	www.goo	9.33E+09	TRUE	
5	james sans	32.65906	-96.7638	3456 B Sov	1200 main	Dallas	75073	Texas	United Sta	Manager	Test 12	MBA	james@gmail.com		8.96E+09	FALSE	
6																	
7																	
8																	
9																	
10																	
11																	

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

Plot External Data ✕

Select File: ⓘ

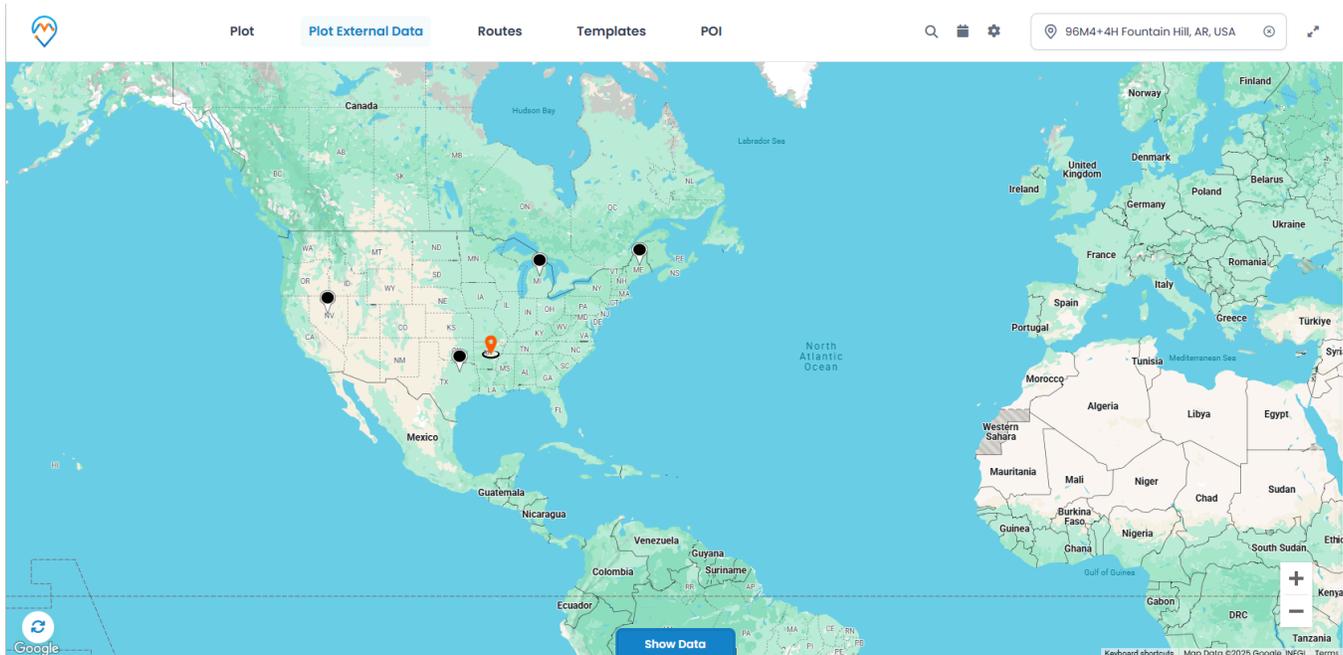
Sample (6).csv Upload

[Sample CSV File](#)

Upload

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.

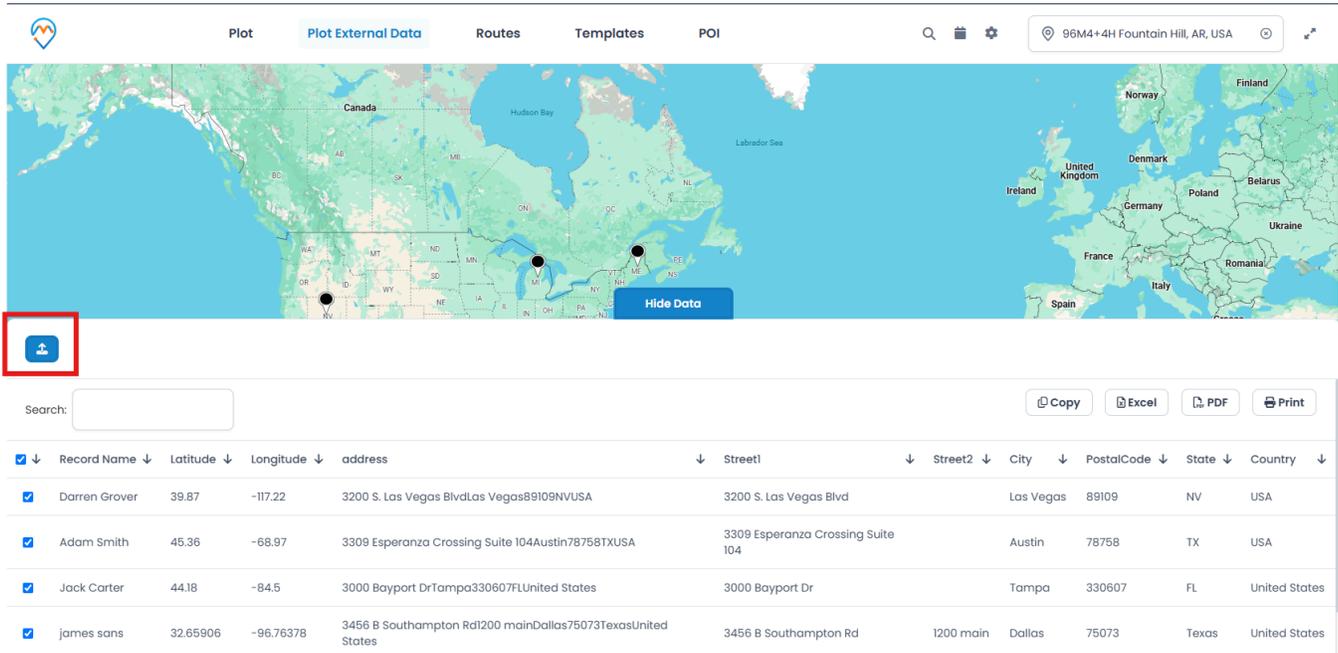
Click on Save once the attributes are selected and the data will be plotted on the map.



Import Data

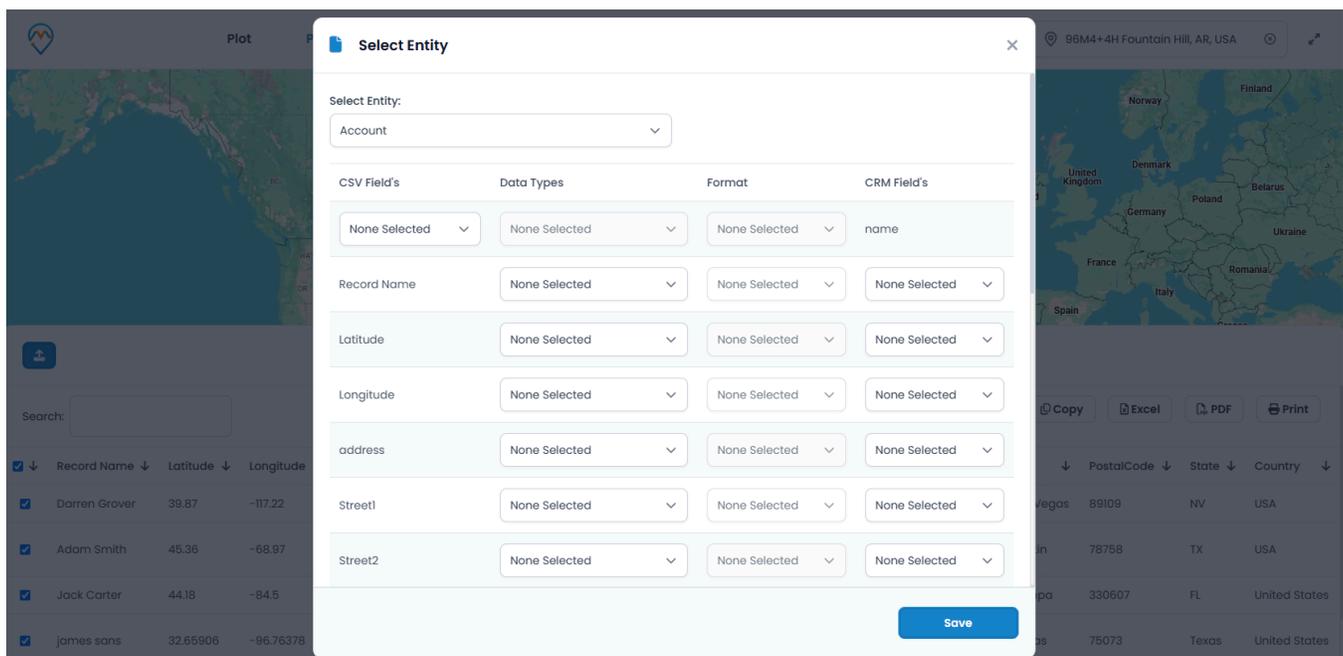
In the **Data Grid** there is a button on the left side through which you will be able to import the data onto your system.

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



<input checked="" type="checkbox"/>	Record Name ↓	Latitude ↓	Longitude ↓	address	Street1	Street2 ↓	City ↓	PostalCode ↓	State ↓	Country ↓
<input checked="" type="checkbox"/>	Darren Grover	39.87	-117.22	3200 S. Las Vegas BlvdLas Vegas89109NVUSA	3200 S. Las Vegas Blvd		Las Vegas	89109	NV	USA
<input checked="" type="checkbox"/>	Adam Smith	45.36	-68.97	3309 Esperanza Crossing Suite 104Austin78758TXUSA	3309 Esperanza Crossing Suite 104		Austin	78758	TX	USA
<input checked="" type="checkbox"/>	Jack Carter	44.18	-84.5	3000 Bayport DrTampa330607FLUnited States	3000 Bayport Dr		Tampa	330607	FL	United States
<input checked="" type="checkbox"/>	james sans	32.65906	-96.76378	3456 B Southampton Rd1200 mainDallas75073TexasUnited States	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.

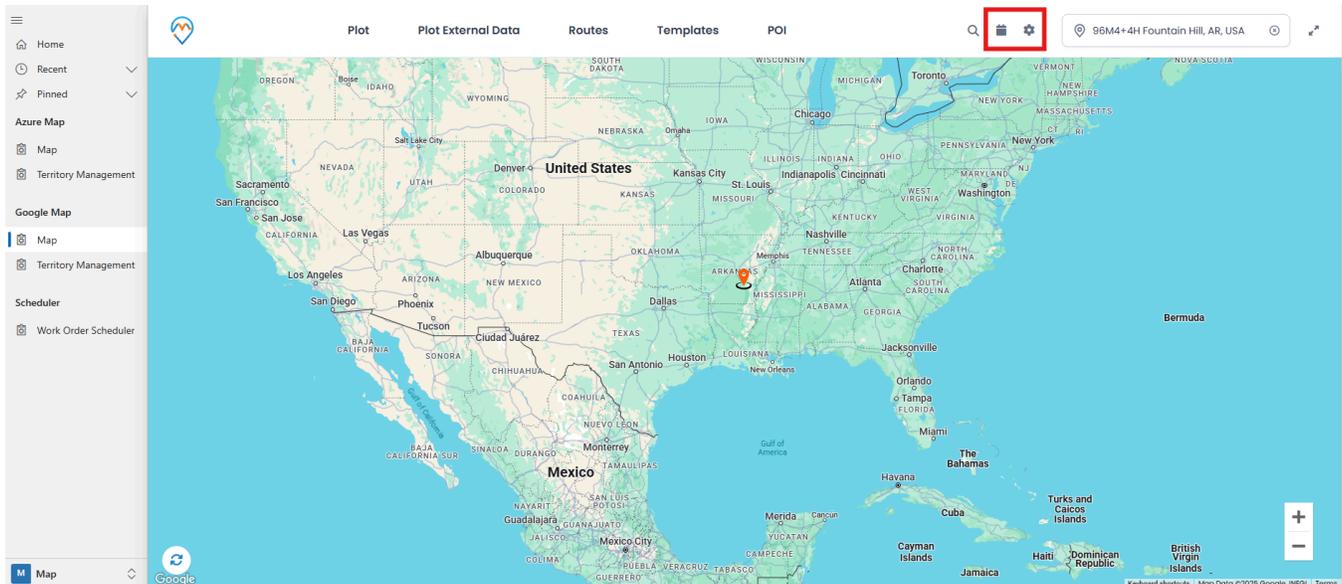


CSV Field's	Data Types	Format	CRM Field's
None Selected	None Selected	None Selected	name
Record Name	None Selected	None Selected	None Selected
Latitude	None Selected	None Selected	None Selected
Longitude	None Selected	None Selected	None Selected
address	None Selected	None Selected	None Selected
Street1	None Selected	None Selected	None Selected
Street2	None Selected	None Selected	None Selected

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

Map view Quick options

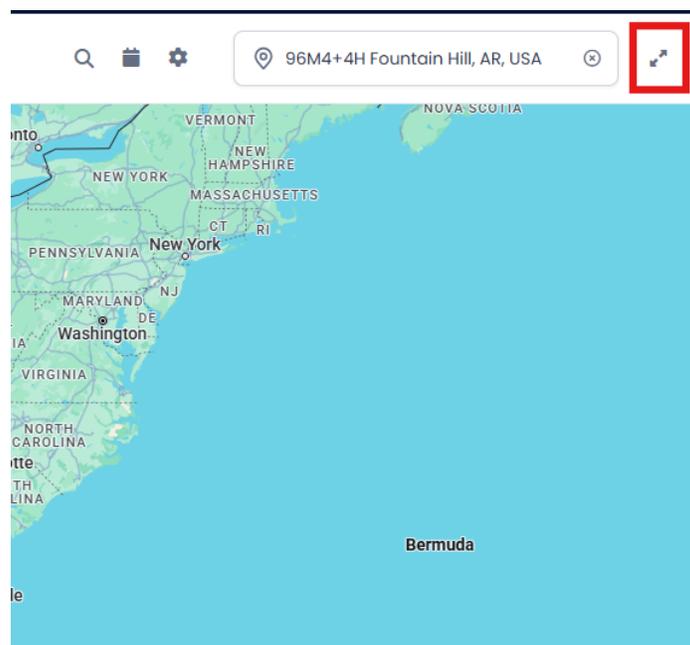
- You will find some quick actions from the header menu of the activity map. The Quick actions are:
 - Calendar View
 - MappyField365 Configuration



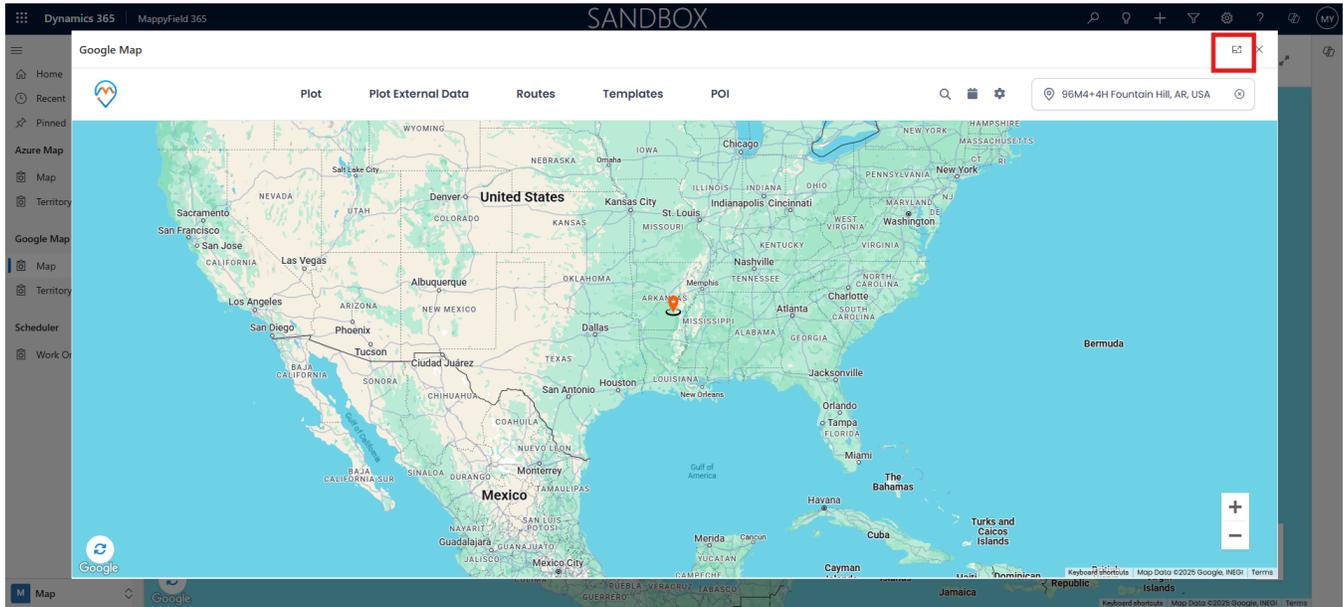
- It will be easy to perform some action from the map itself, you will not require to navigate the individual options.

Full Screen

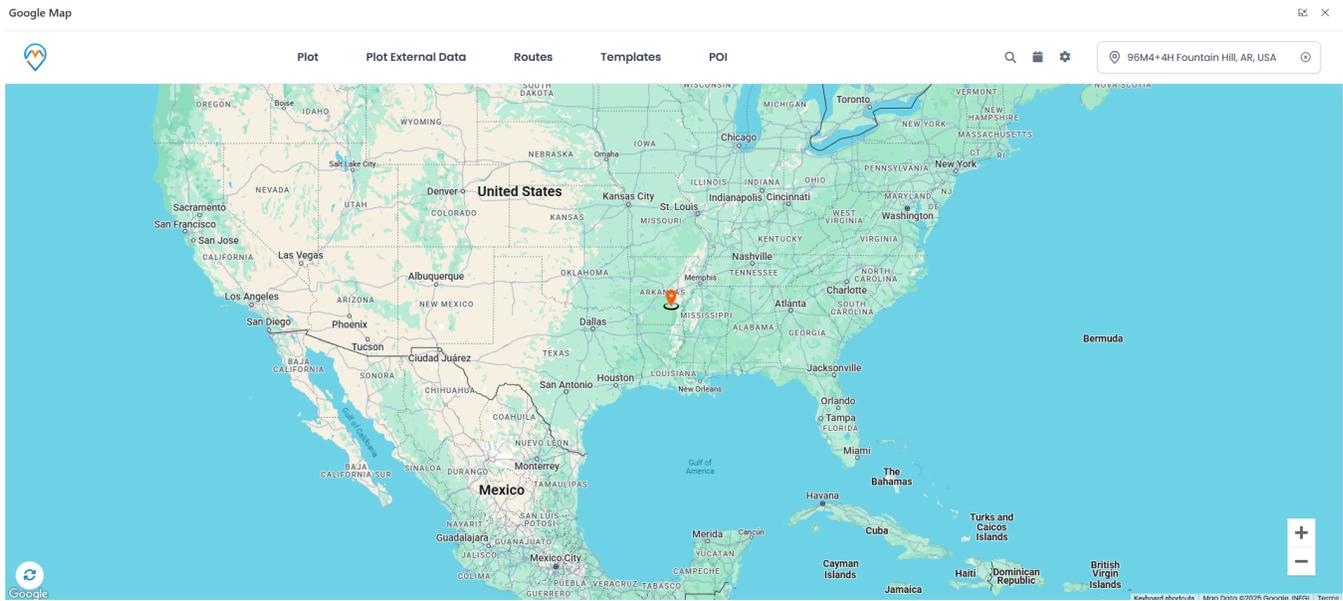
- From the right side on the MappyField365 header, there is an option for  Full Screen View.



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

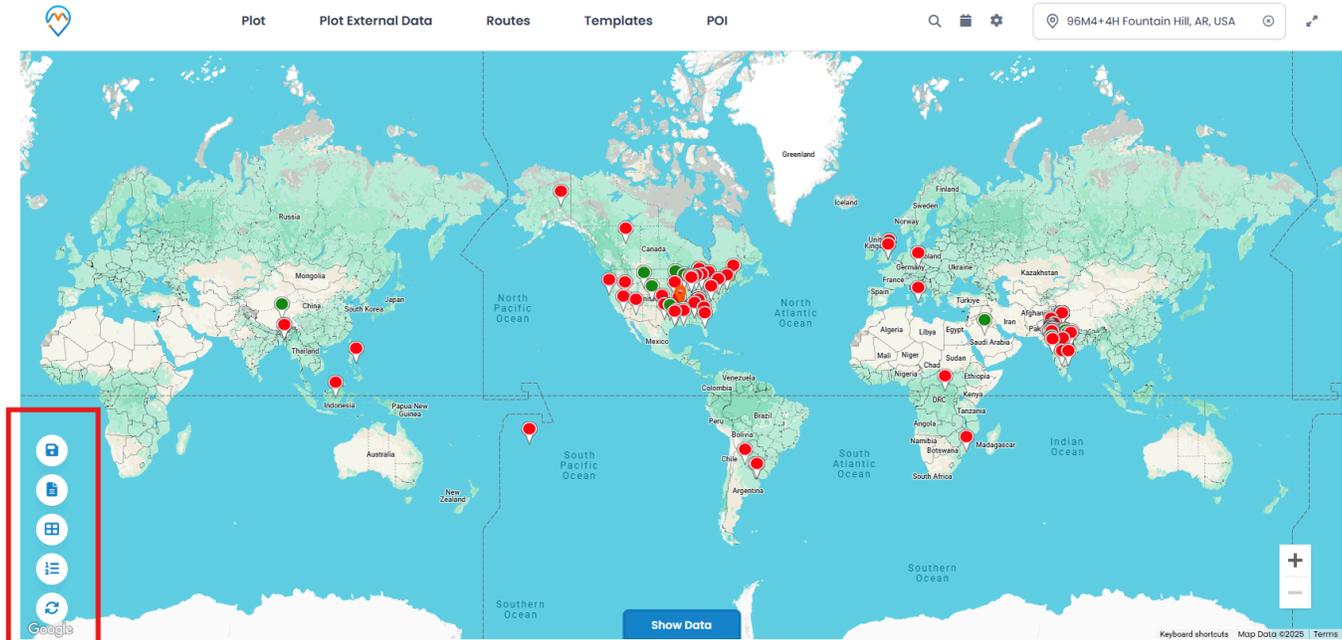


- By clicking on the 'Full screen' icon, the map view will open in the Full screen view.



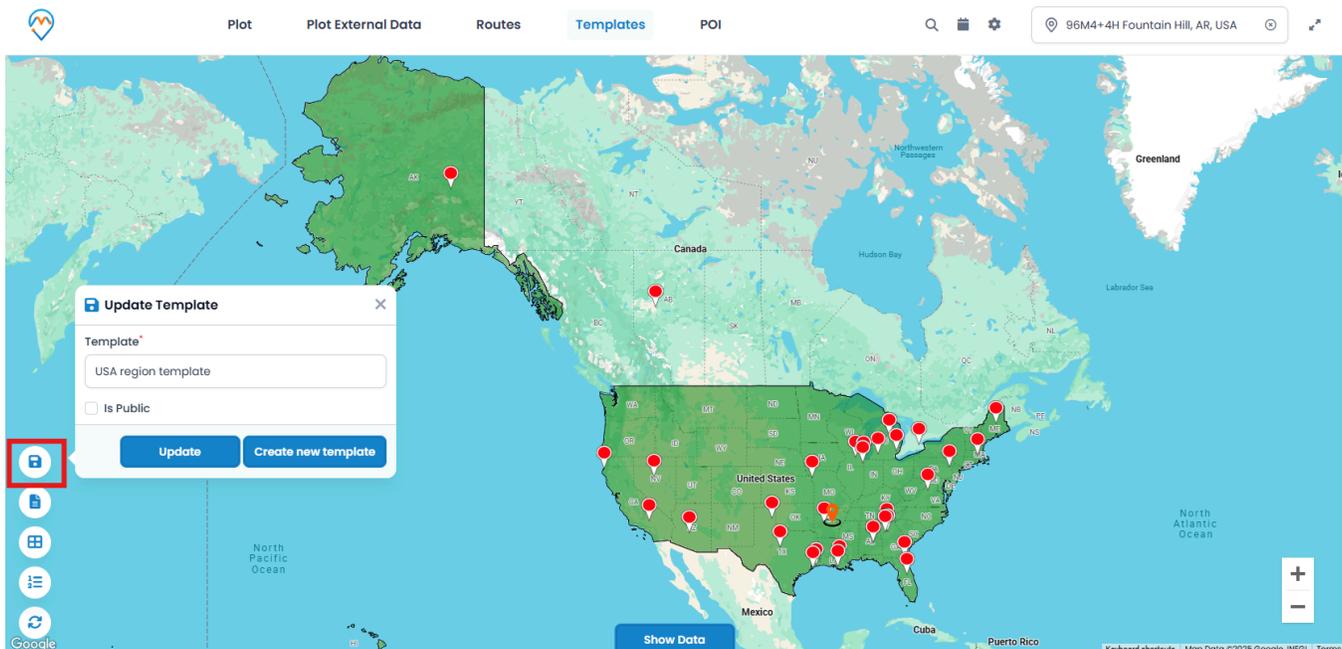
Advance Options

- 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**.



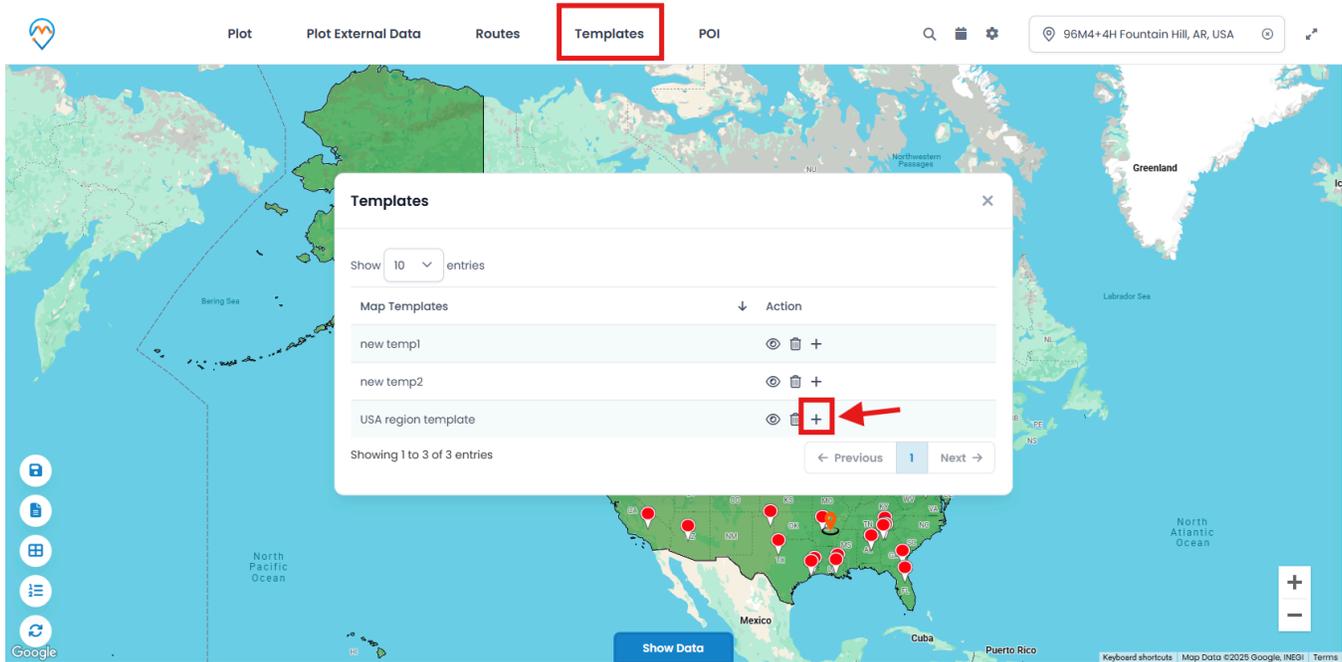
Save Template

- 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.

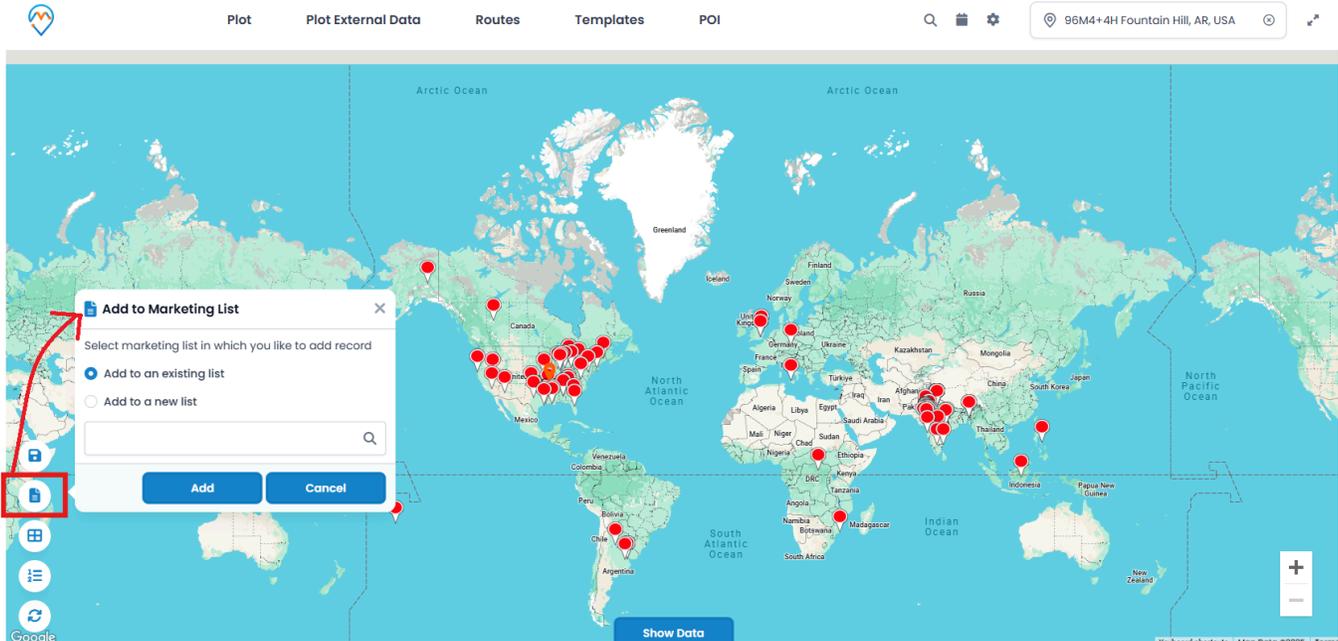
- You can check the saved templates from the **Templates** tab from the header.



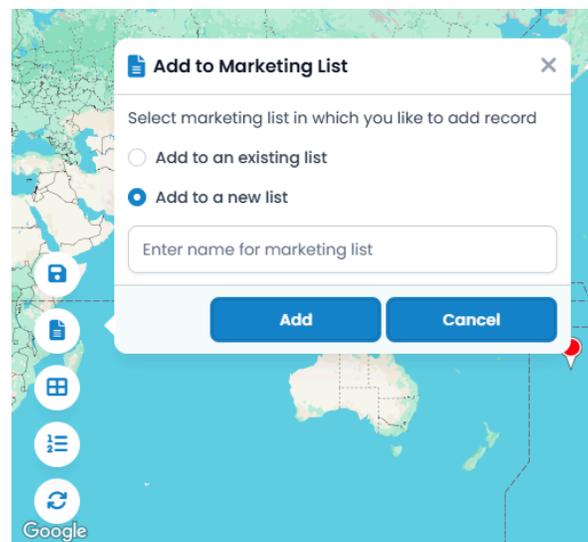
- To make a default template, click on the + icon, it will be set as default template and when you (or any CRM users) will navigate to the activity map (Map), it will load with the default template records.
- By clicking on the view  icon, you can view the records of that template on the map. You can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



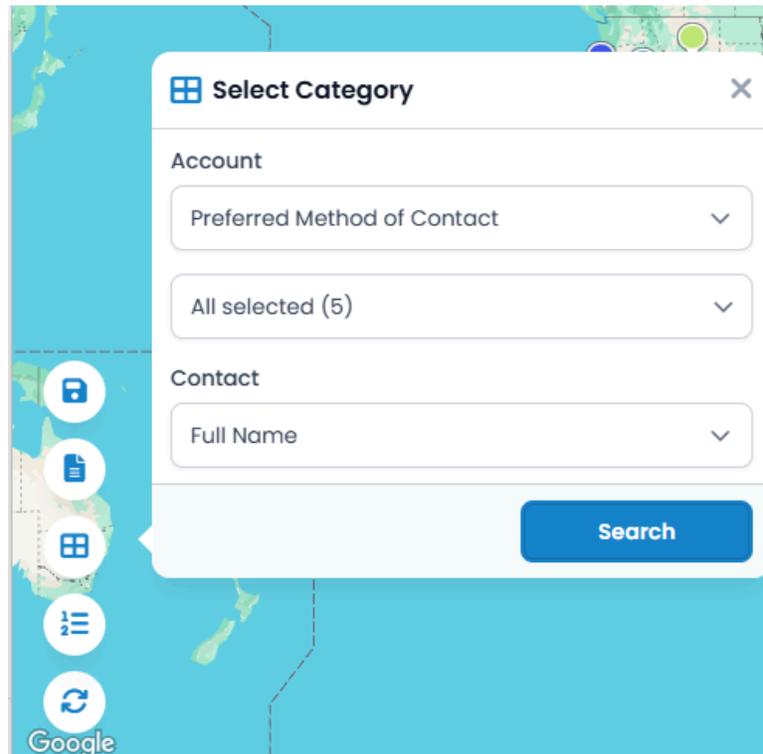
- You can get the “Marketing List” by clicking on Search icon 🔍 if it has already been created in Marketing -> Marketing List or you can add to a new list by selecting the “Add to a new list”.



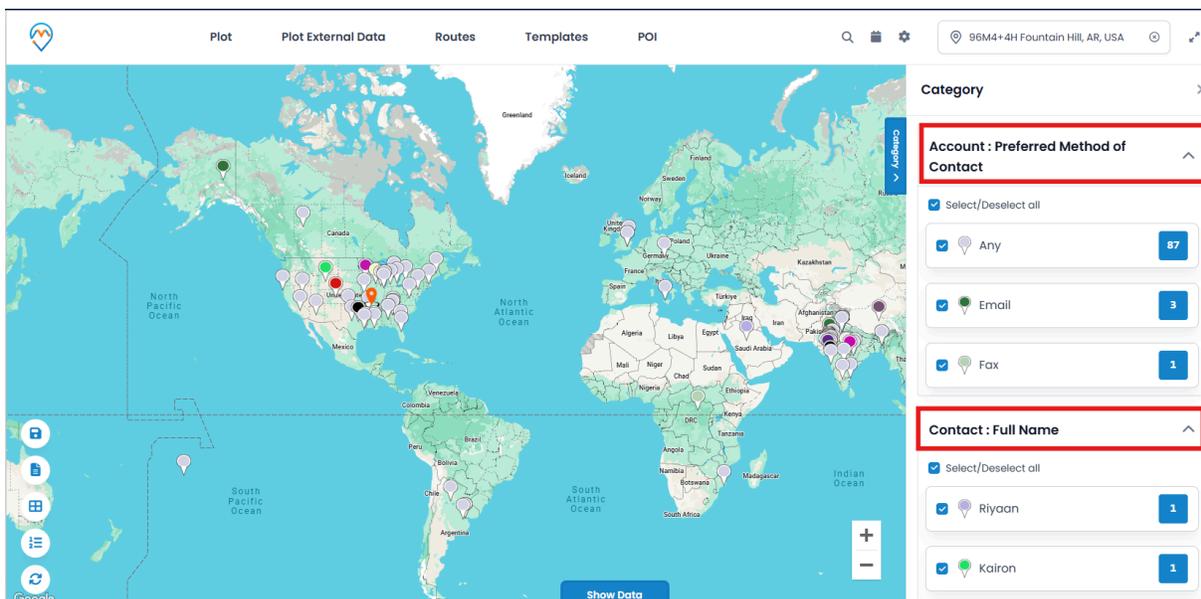
Note: At a time only the single entity records can be assigned to the Marketing List.

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.



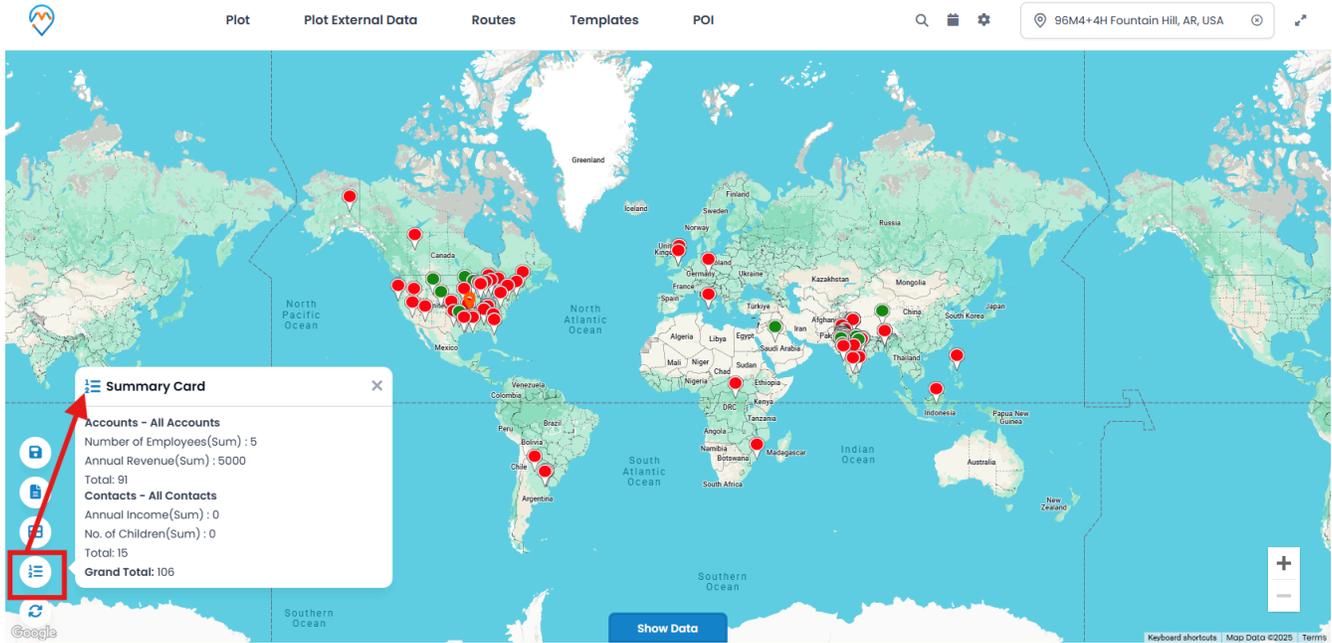
- By clicking on the ‘Search’ button, the data will plot pins as per the selection of attributes. You will get the list of selected categories entity-wise on the right side of the map (Infobox).



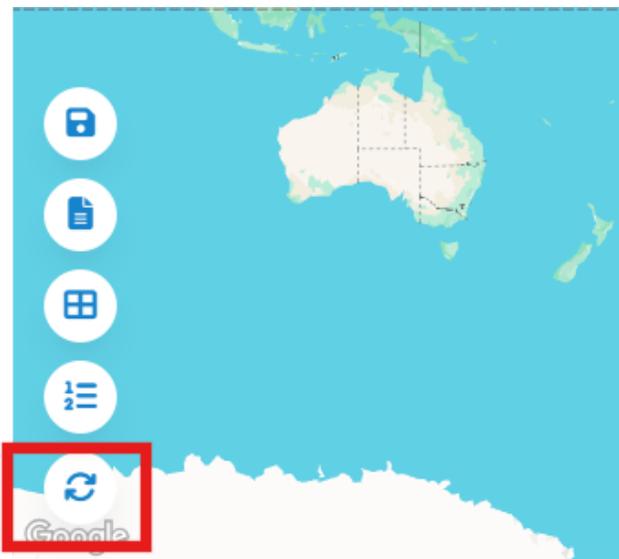
- You will see the categorized records with the number of records.

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.



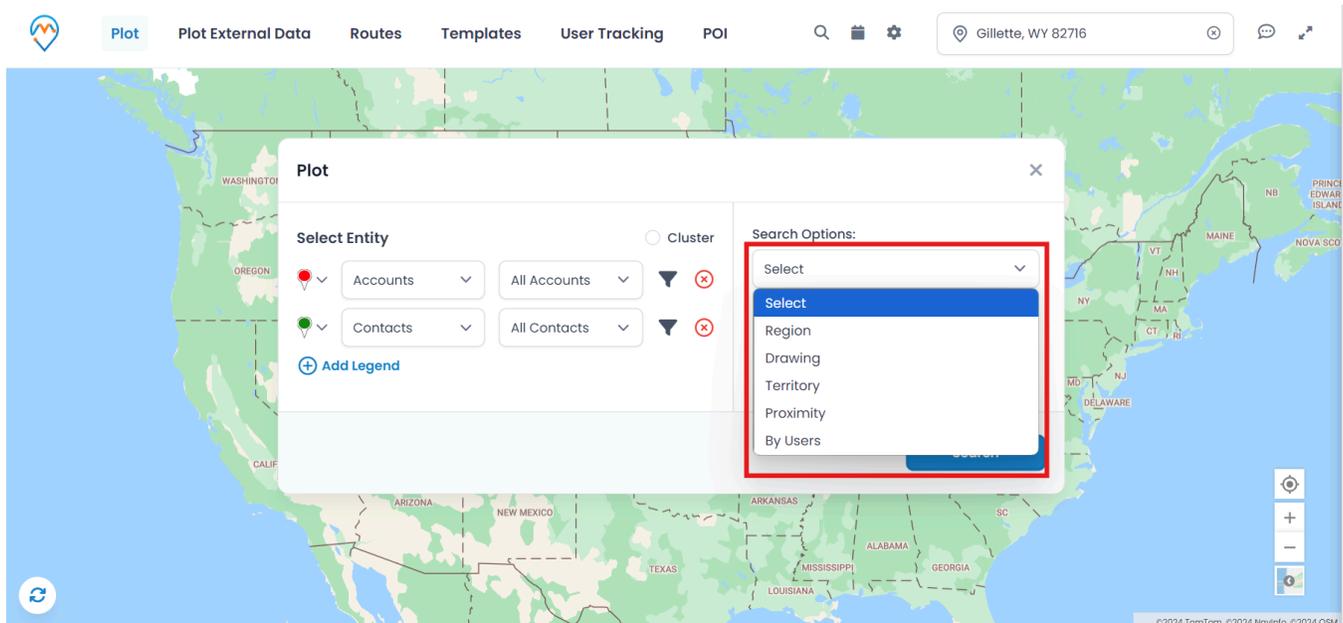
Refresh



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

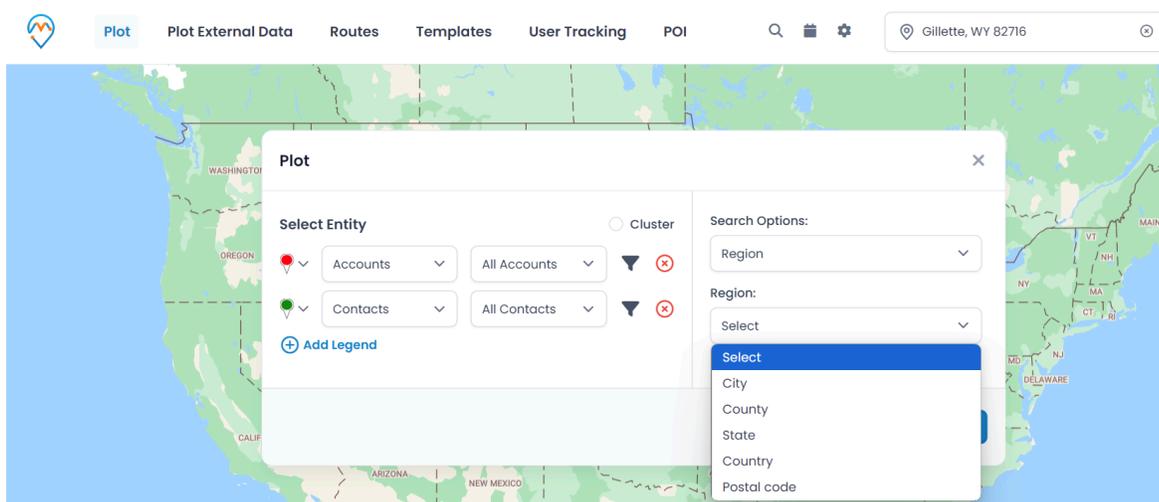
Search Options

- 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:
 - Region
 - Drawing
 - Territory
 - Proximity
 - By User/Teams



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**.



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

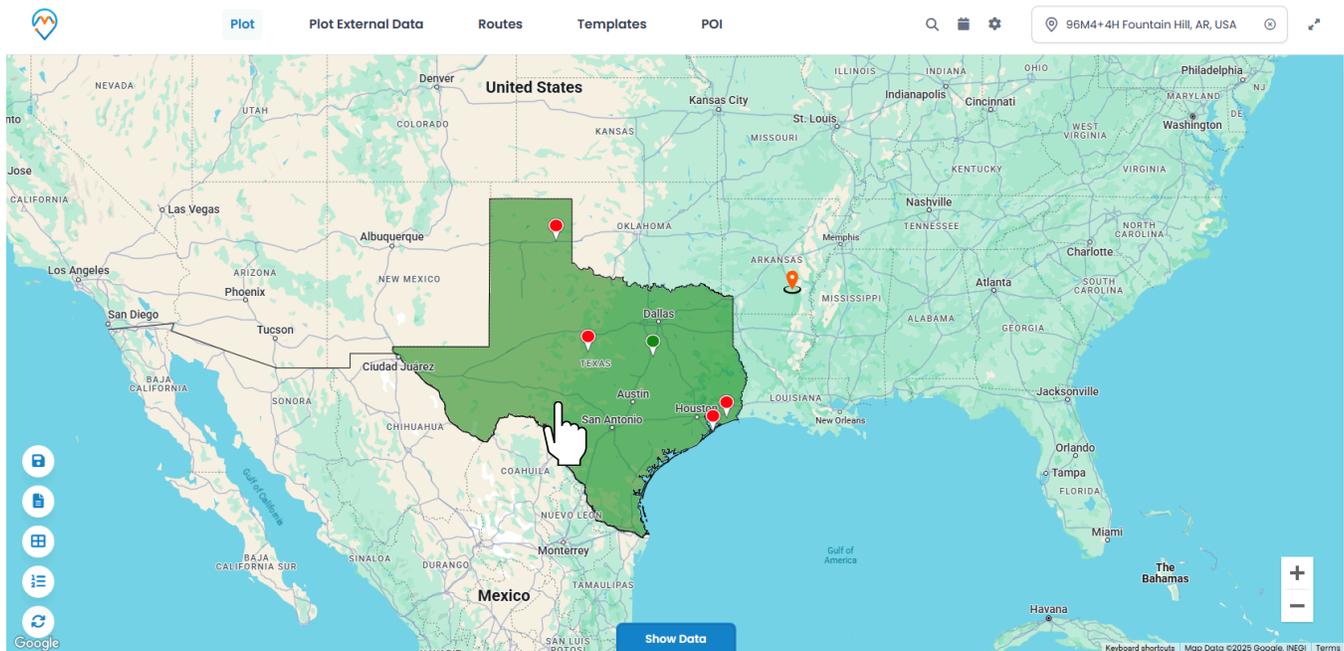
Search Options:

Region:

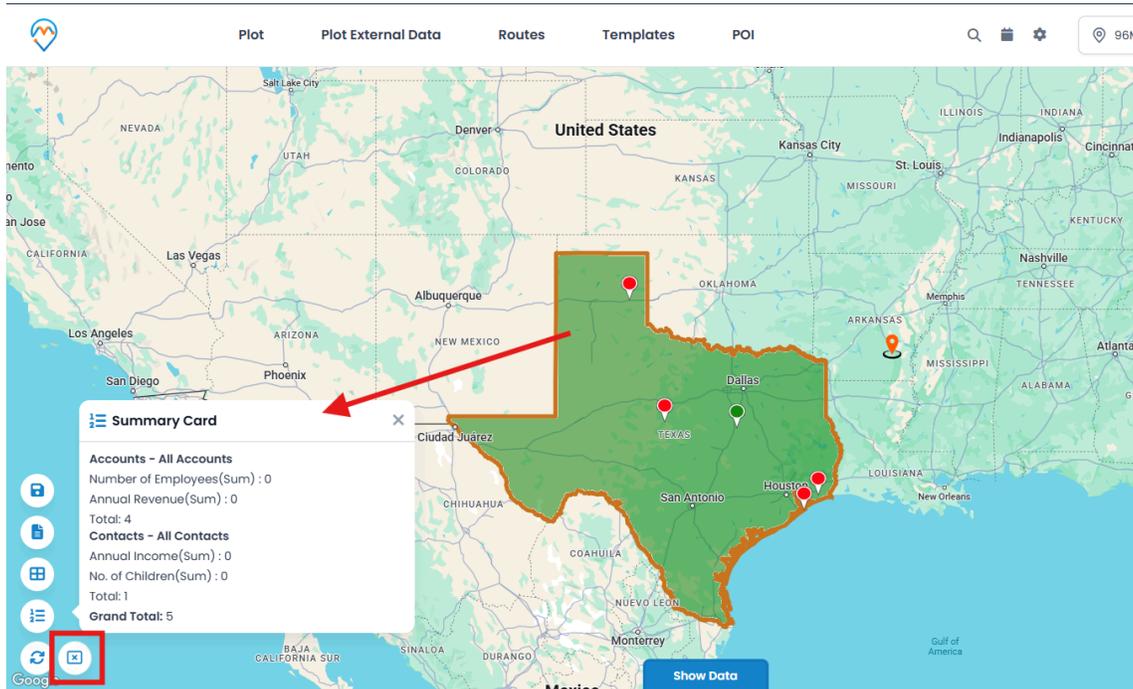
State:*

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.

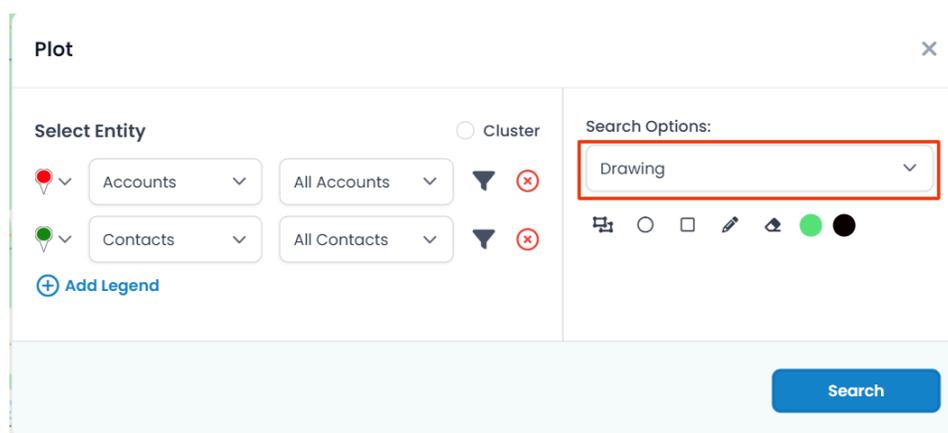


- By clicking on the close **X** icon, the state will deselect.
- You can also manage the Territory when the **Region** search option is selected and records are plotted on the map.

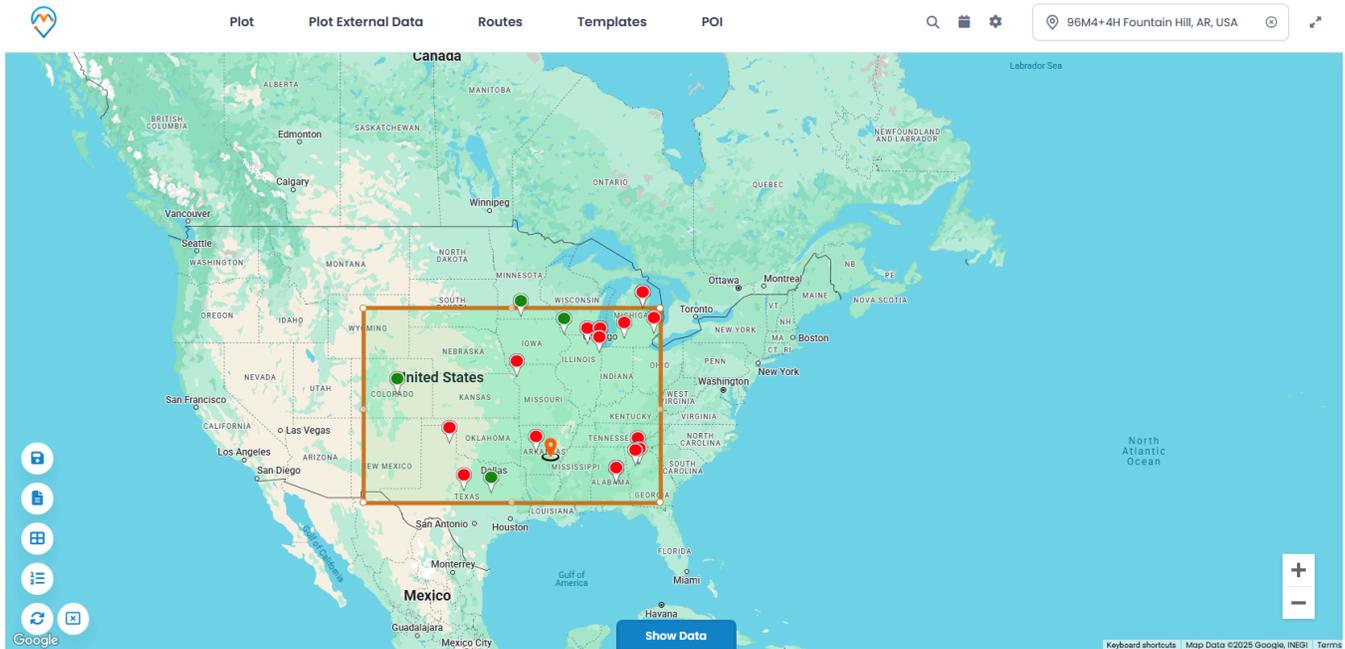
Note: You can create and manage the Territory from the individual option of the “Territory Management”.

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.



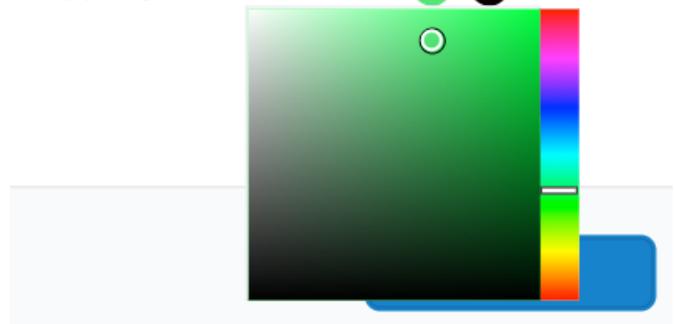
- For free drawing select the ‘Polygon’ shape, just by single clicking on the map drag the mouse cursor the shape will be drawn. You will get the records as per your drawing on the map.



- 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”  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



Accounts

All Accounts



Contacts

All Contacts



[+ Add Legend](#)

Search Options:

Territory

Territory:

2 selected

colorado

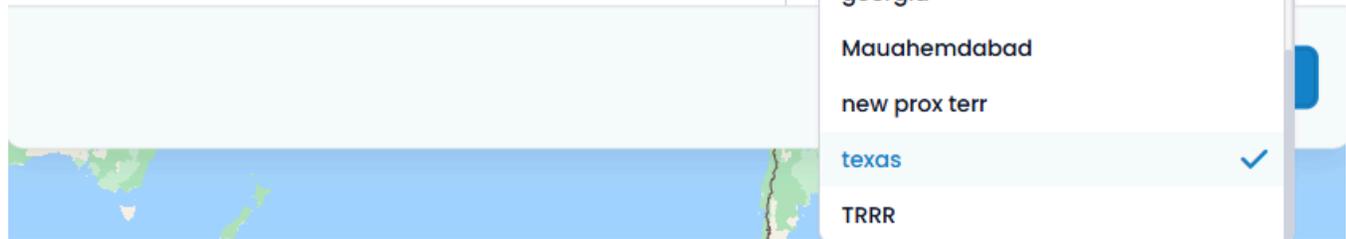
georgia

Mauhemdabad

new prox terr

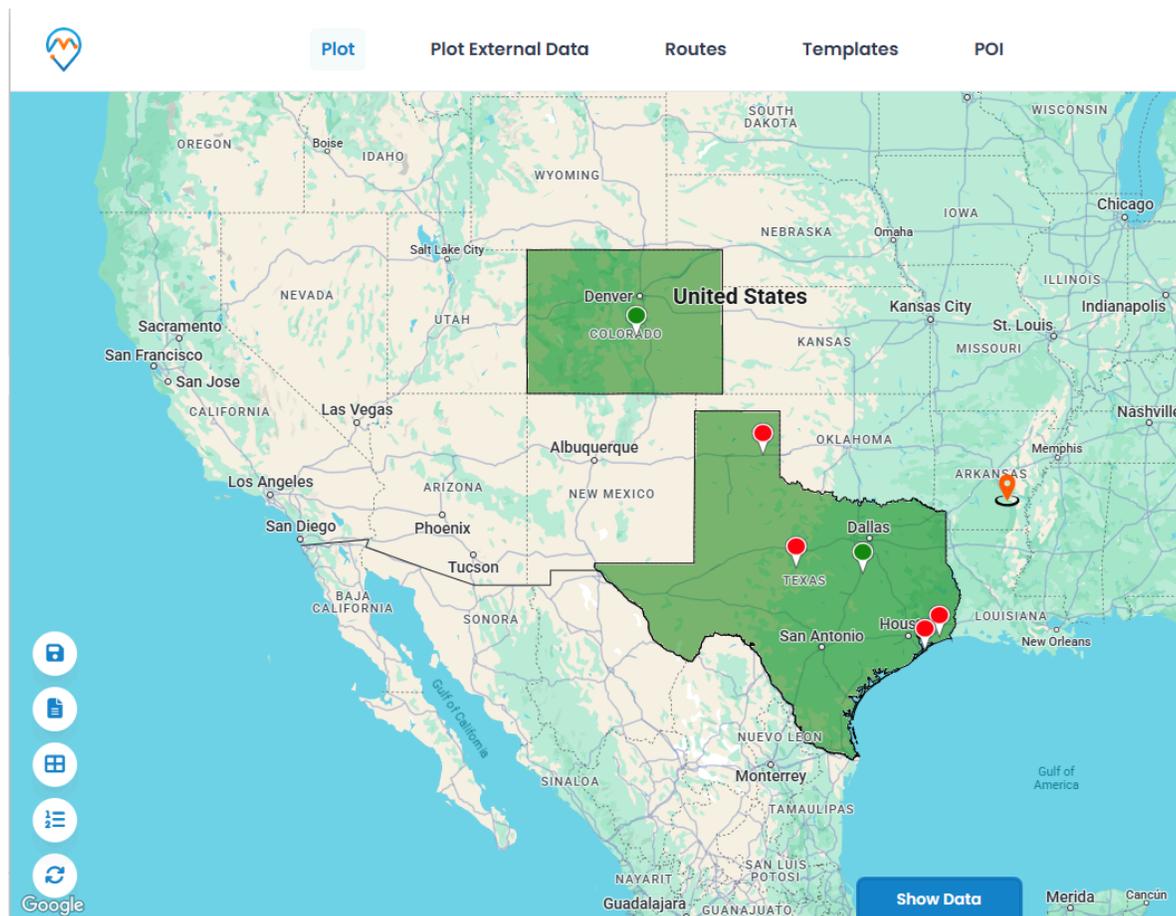
texas

TRRR



- 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.

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



Note: 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.

Plot
✕

Select Entity

●
▼

Accounts

▼

All Accounts

▼
▼
✕

●
▼

Contacts

▼

All Contacts

▼
▼
✕

+ Add Legend

Search Options:

Proximity ▼

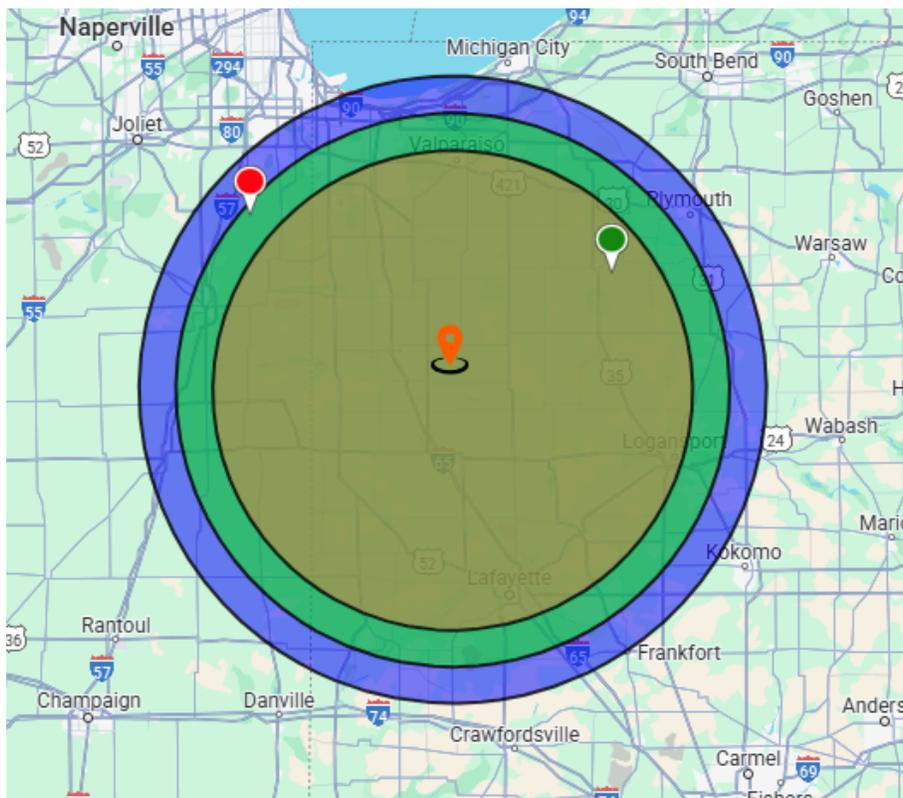
65

75

85

Kilometers ▼

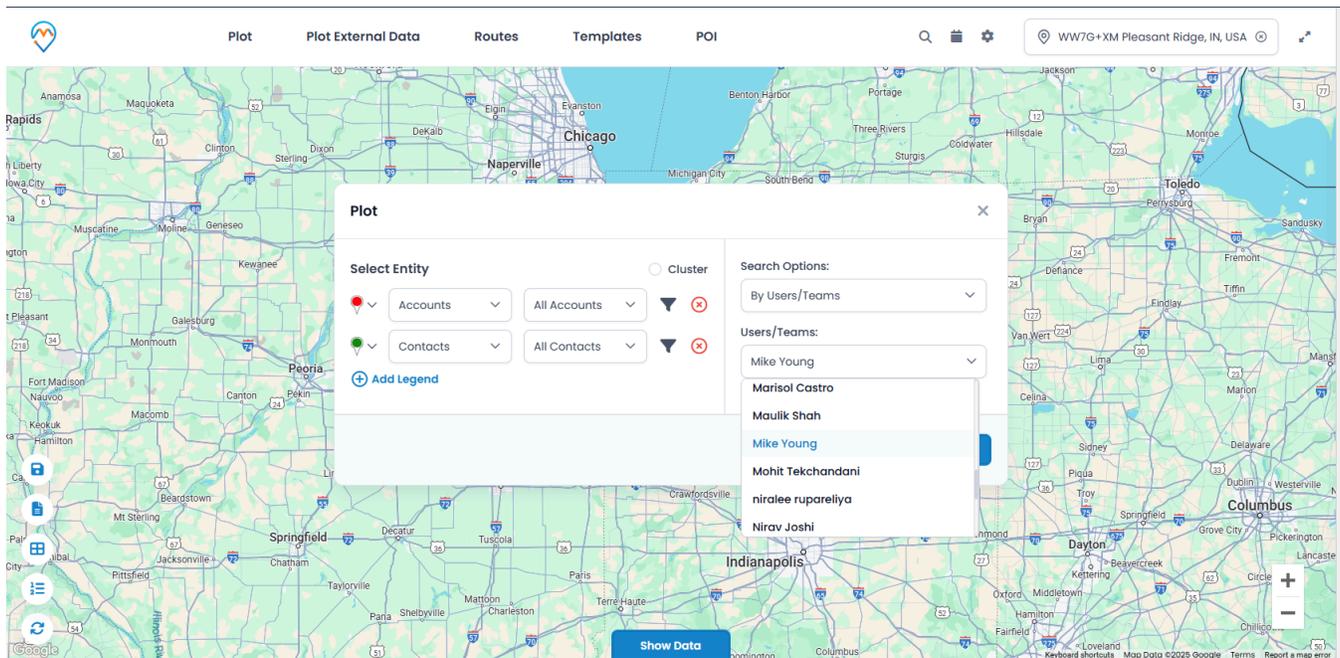
Search



- 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.



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

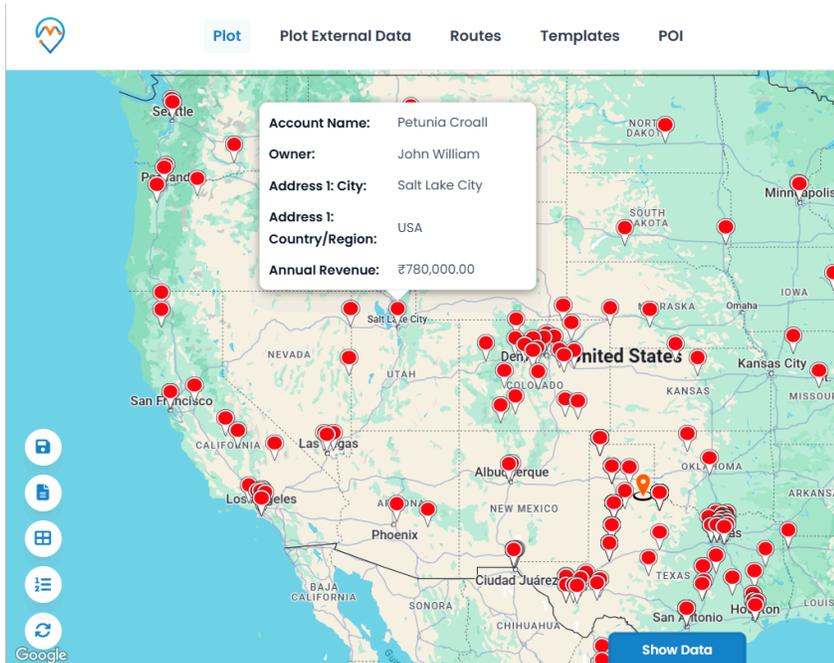
Note: This search option is available only to users who have admin roles.

Map View options

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

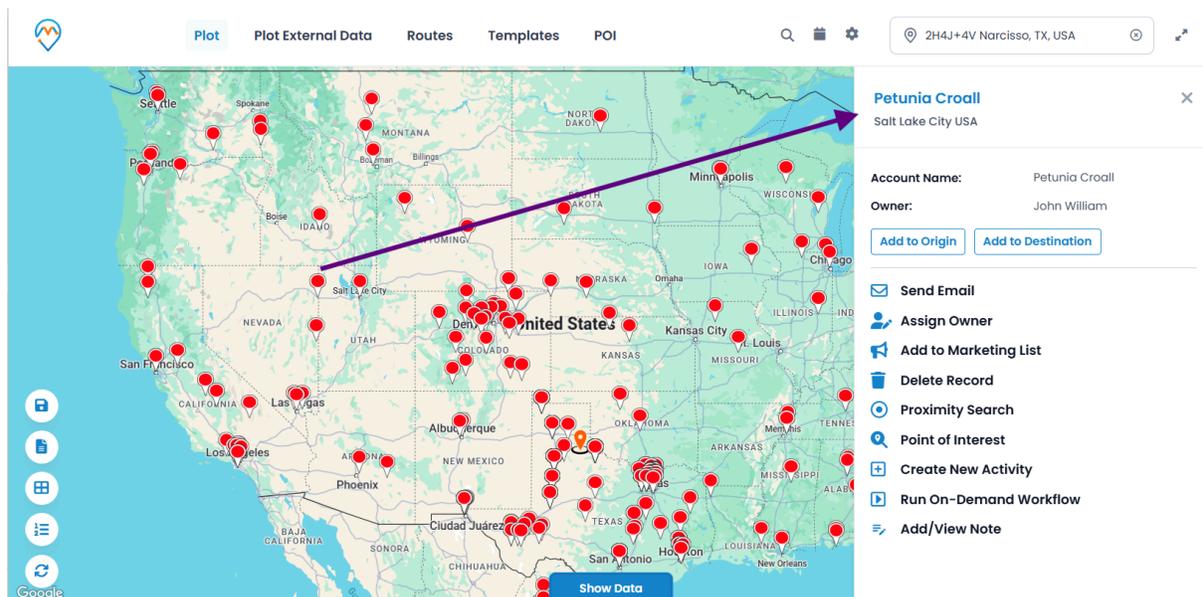
Details on Hover

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 (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

Education stream: -

Add to Origin

Add to Destination

- Send Email
- Assign Owner
- Add to Marketing List
- Priority Search
- Point of Interest
- Create New Activity
- Share Record
- Run the Standard Workflow
- Add New Note

You can **Share & Assign** the selected records by:

- > Sending Email
- > Assigning Owner
- > Add to Marketing List

Alpine Ski House



Argyle Bartonville TX 76226 United States

Education stream: -

Add to Origin

Add to Destination

- Send Email
- Assign Owner
- Add to Marketing List

- Priority Search
- Point of Interest
- Create New Activity
- Share Record
- Run the Standard Workflow
- Add New Note

Note: 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** configuration.

Other Actions:

- > Proximity Search
- > Point of Interest
- > Create New Activity
- > Delete Record
- > Run On-Demand Workflow
- > Add /View Note

Alpine Ski House ✕

Argyle Bartonville TX 76226 United States

Education stream: -

Add to Origin

Add to Destination

 Send Email

 Assign Owner

 Add to Marketing List

 Proximity Search

 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 card 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 ✕

Argyle Bartonville TX 76226 United States

Education stream: -

Add to Origin

Add to Destination

 Send Email

 Assign Owner

 Add to Marketing List

 Proximity Search

 Point of Interest

 Create New Activity

 Delete Record

 Run On-Demand Workflow

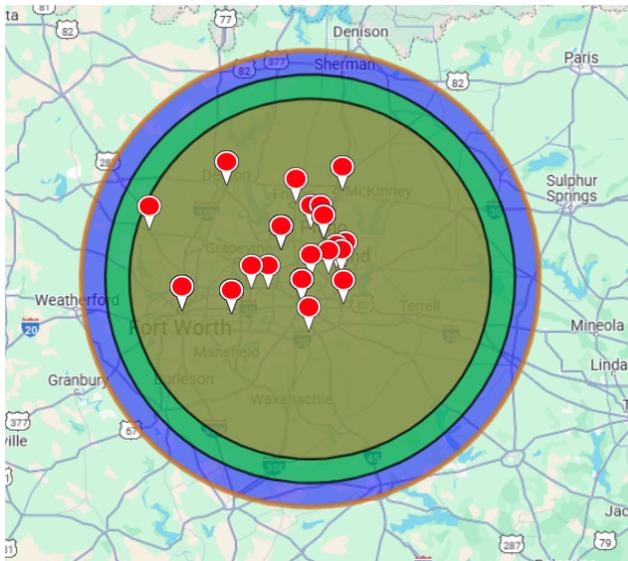
 Add/View Note

Proximity Search

75 85 95

Kilometers

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

POI Location:

Washington

POI Radius:

10

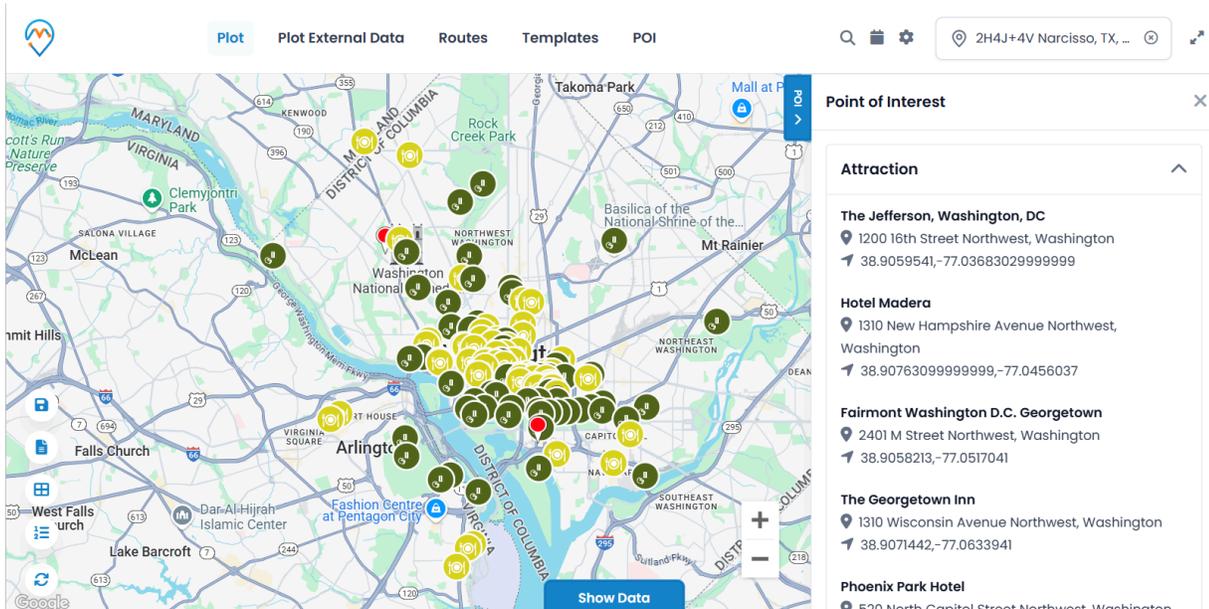
  

Go

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

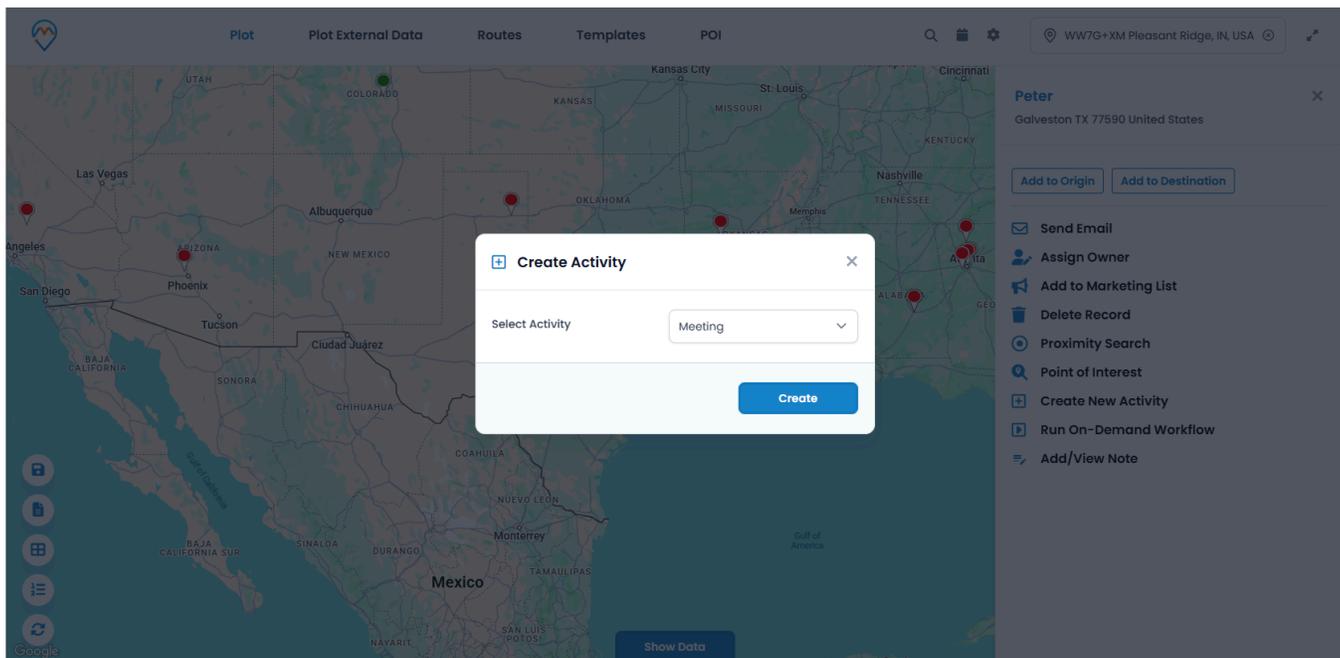
It will take the address of the selected record as POI location to search nearby places.

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

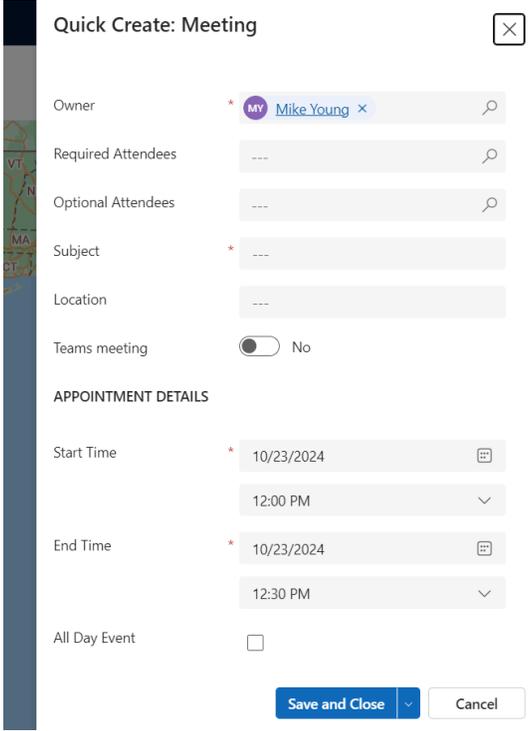


Create New Activity

- 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.



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



Quick Create: Meeting

Owner *

Required Attendees

Optional Attendees

Subject *

Location

Teams meeting No

APPOINTMENT DETAILS

Start Time *

End Time *

All Day Event

- 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

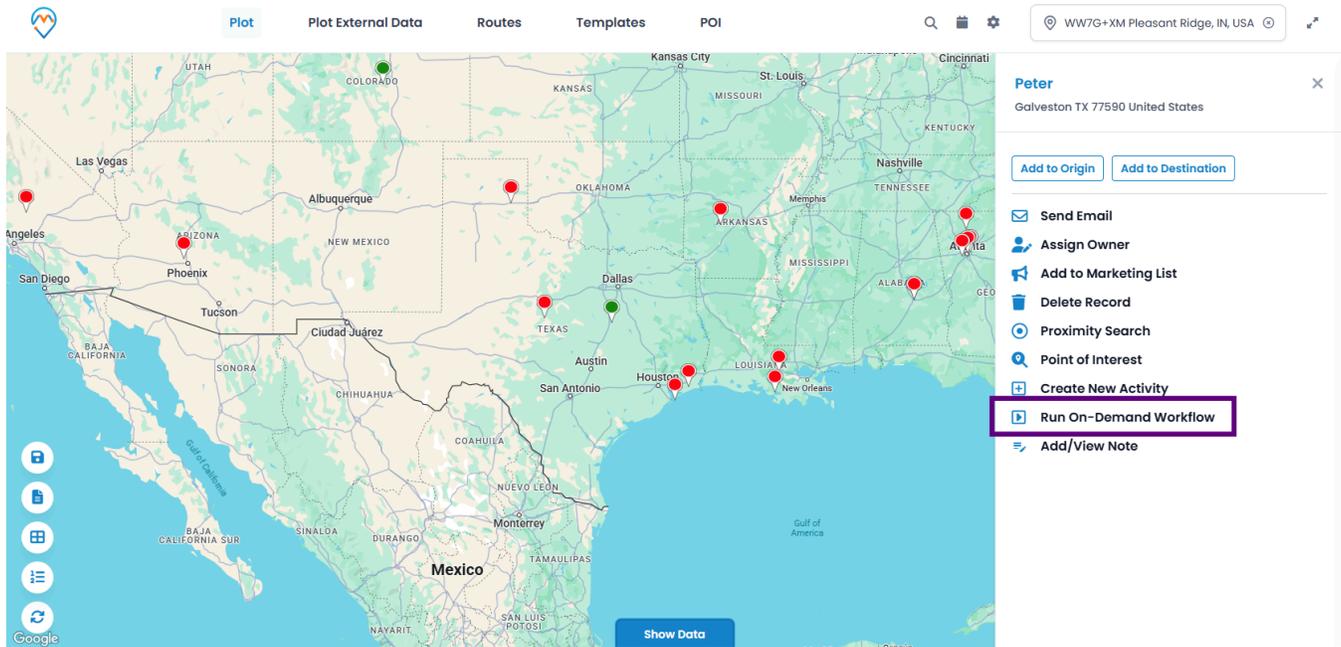
- By clicking on the delete button, the selected record from the map gets deleted from the CRM.

- Send Email
- Assign Owner
- Add to Marketing List
- Proximity Search
- Point of Interest
- Create New Activity
- Delete Record 
- Run On-Demand Workflow
- Add/View Note

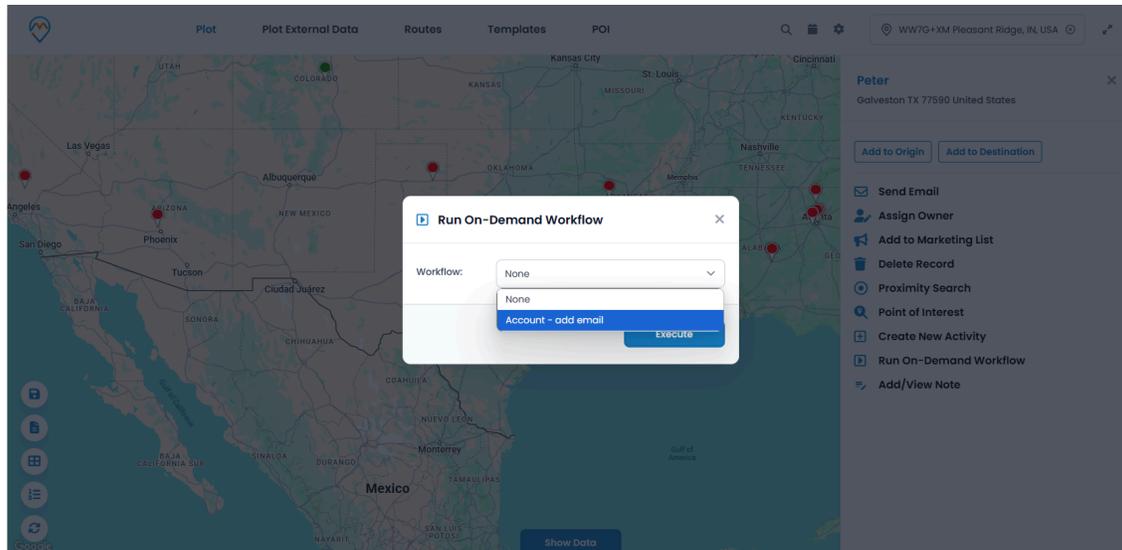
Run On-Demand Workflow

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.



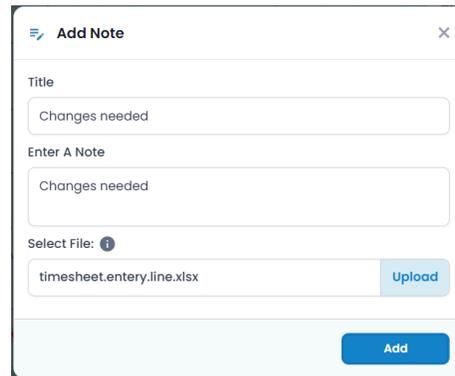
A pop-up would display where you need to select the workflow and click on Execute.



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

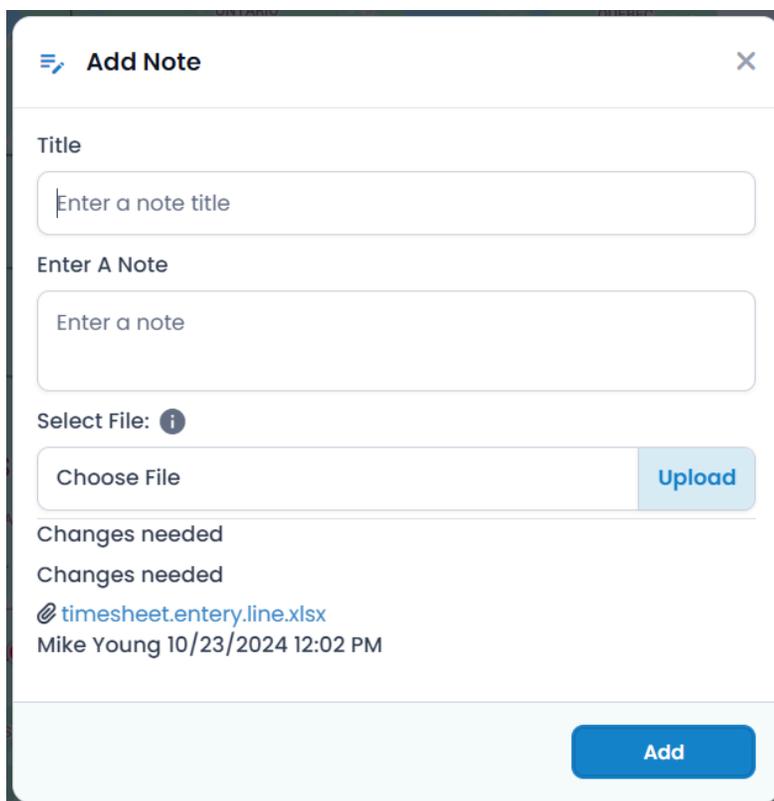
Title
Changes needed

Enter A Note
Changes needed

Select File: ⓘ
timesheet.entry.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

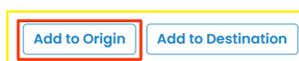
Enter A Note
Enter a note

Select File: ⓘ
Choose File Upload

Changes needed
Changes needed
📎 timesheet.entry.line.xlsx
Mike Young 10/23/2024 12:02 PM

Add

Direction

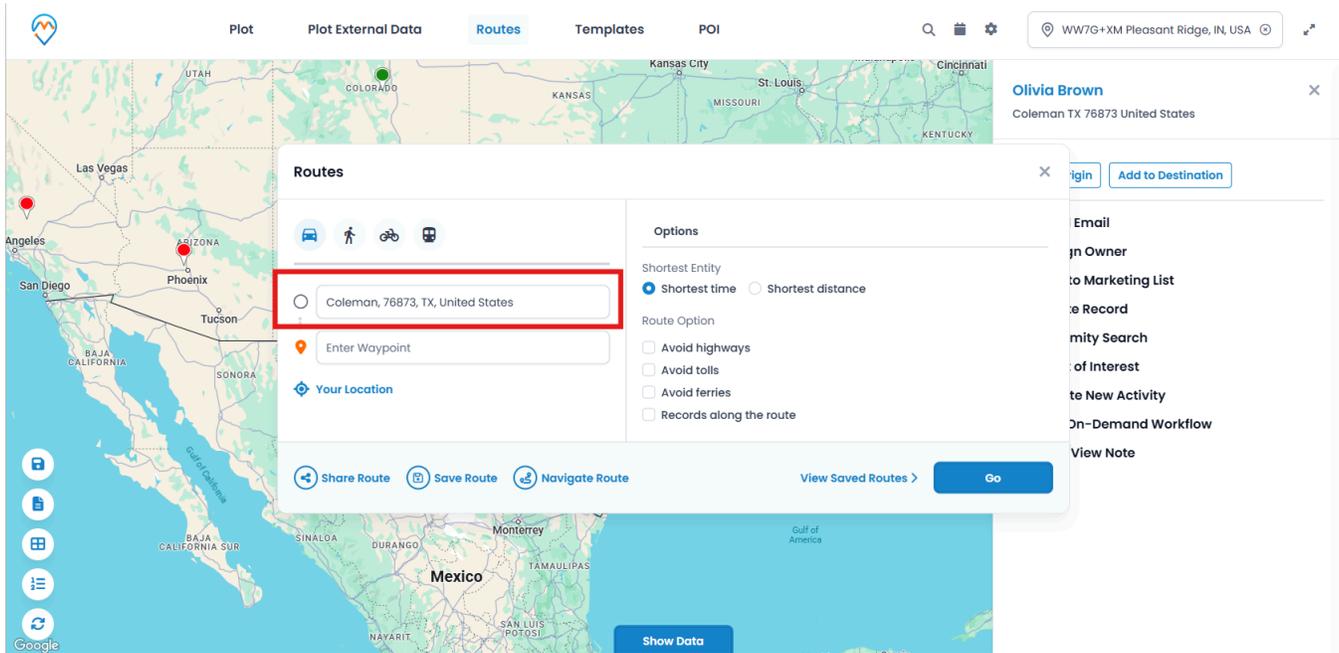


Add to Origin Add to Destination

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

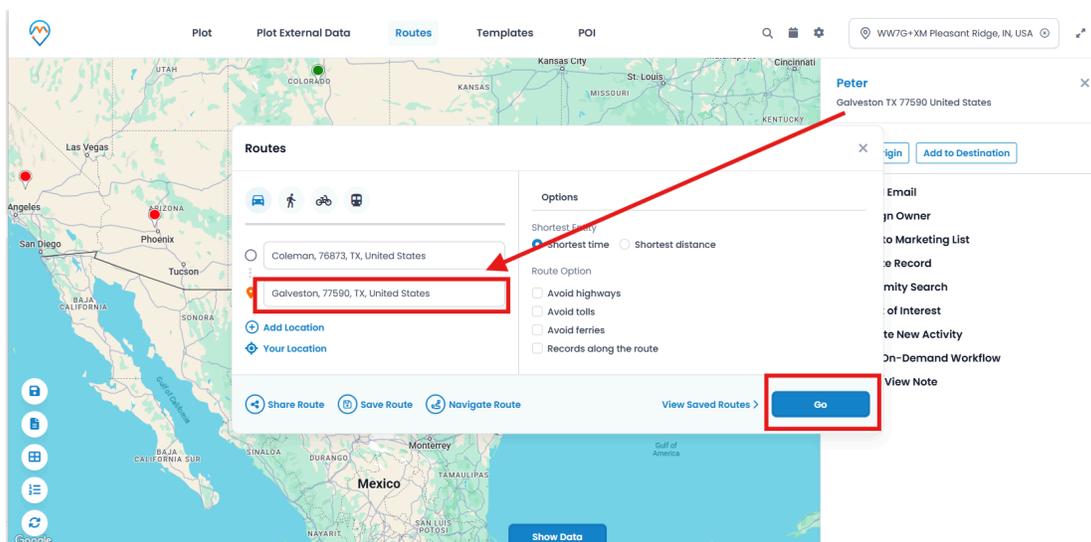
From **Routes** tab you will get address of your customer's location.

- 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.



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

Plot Plot External Data Routes Templates POI

WW7G+XM Pleasant Ridge, IN, USA

153 E Walnut St, Coleman, TX 76834, USA

366 mi. About 5 hours 59 mins

1. Head east on TX-153 E/E Walnut St toward S Colorado St Continue to follow TX-153 E 0.8 mi
2. Slight left onto US-283 S/US-84 E Continue to follow US-84 E Pass by Dairy Queen (on the left in 7.5 mi) 30.9 mi
3. Turn right onto US-183 S/US-84 E Continue to follow US-84 E 81.1 mi
4. Turn right onto TX-36 BUS S/Main St 1.1 mi
5. Turn right onto TX-36 S 30.6 mi
6. Turn right onto NW H K Dodgen Loop/ NW H K Dodgen Loop Frontage Rd Continue to follow NW H K Dodgen Loop 0.9 mi
7. Take the ramp onto TX-36/TX-363 Loop E 2.0 mi
8. Continue onto TX-36/US-190 E/W Hwy 36 Pass by Pizza Hut (on the left in 31.2 mi) 43.8 mi
9. Turn left onto Avenue C/W Ave C Continue to follow Avenue C 1.3 mi
10. Turn right onto TX-36 S/State Hwy 36 48.5 mi

Show Data

Send Email using Template

Add to Origin

Add to Destination

Send Email

Assign Owner

Add to Marketing List

From the Share & Assign, you can 'Send Email' to the selected record.

By clicking on that action button, it would prompt user to select an email 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

Note: 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](#)

 Send Email

 **Assign Owner**

 Add to Marketing List

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**

Note: 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.

[Add to Origin](#)[Add to Destination](#) **Send Email** **Assign Owner** **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

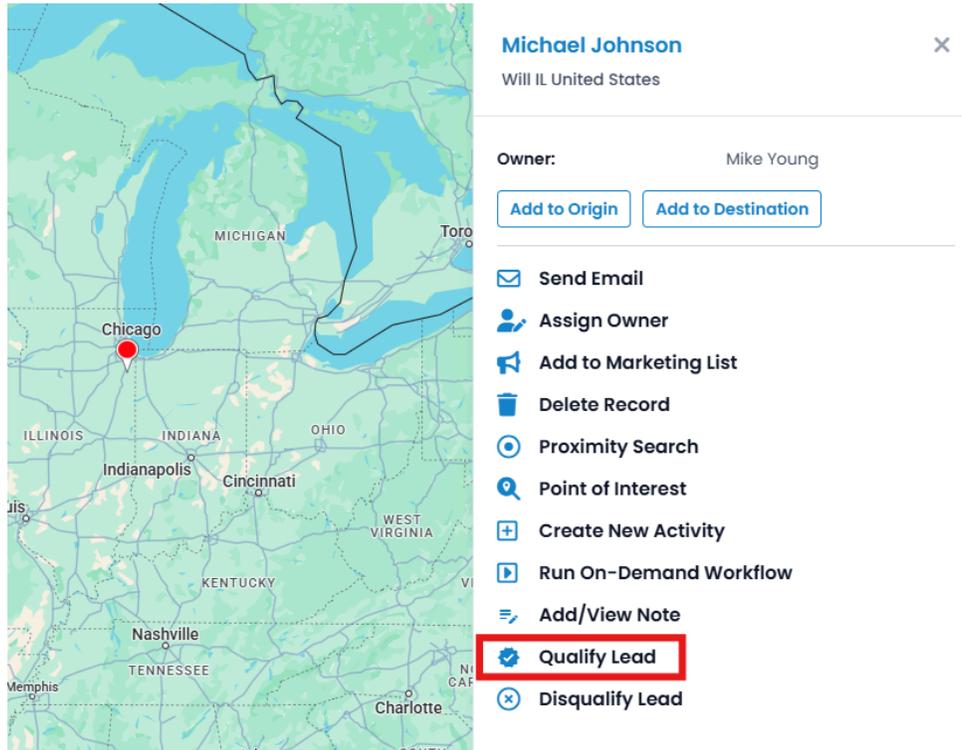
[Add](#) [Cancel](#)

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

Note: 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

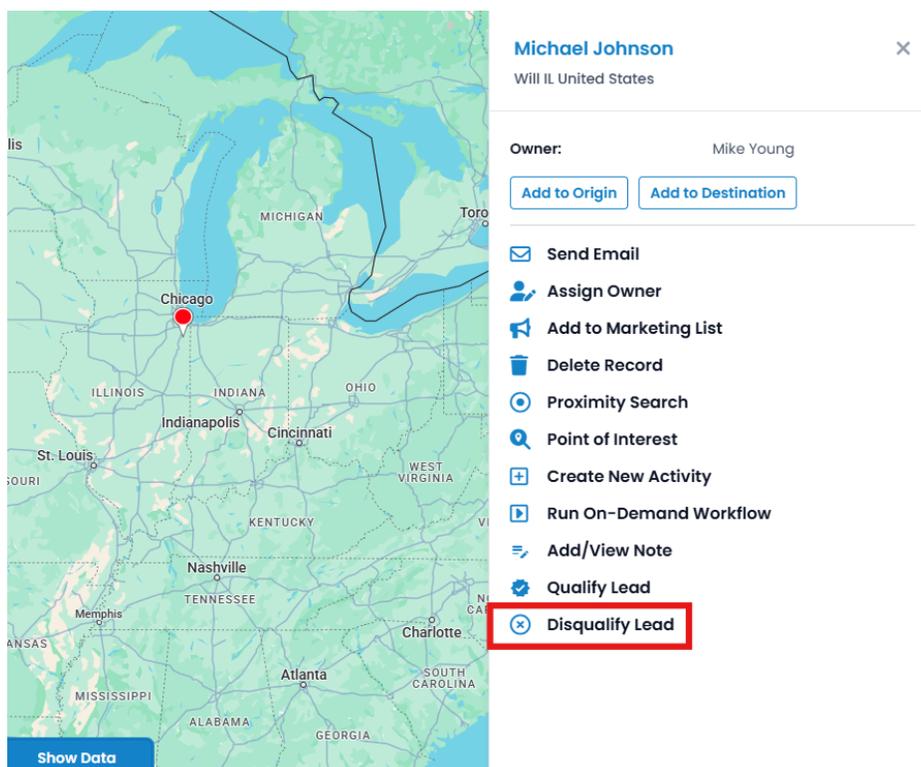
- By clicking on “Qualify Lead” icon, status of lead will get updated to close state and user will be redirected to the opportunity page from the map. It is available only for record of lead entity.



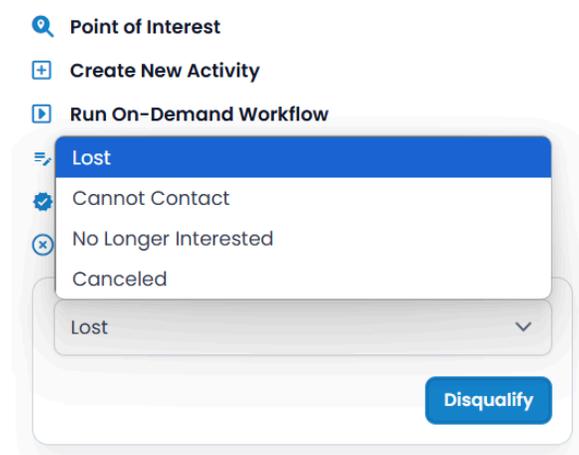
Note: Open leads will display option to qualify/disqualify leads. Once leads are qualified, those leads will be shown in Closed Leads view.

Disqualify Lead

- By clicking on “Disqualify Lead” icon, leads will get disqualified and its status will be changed to close.



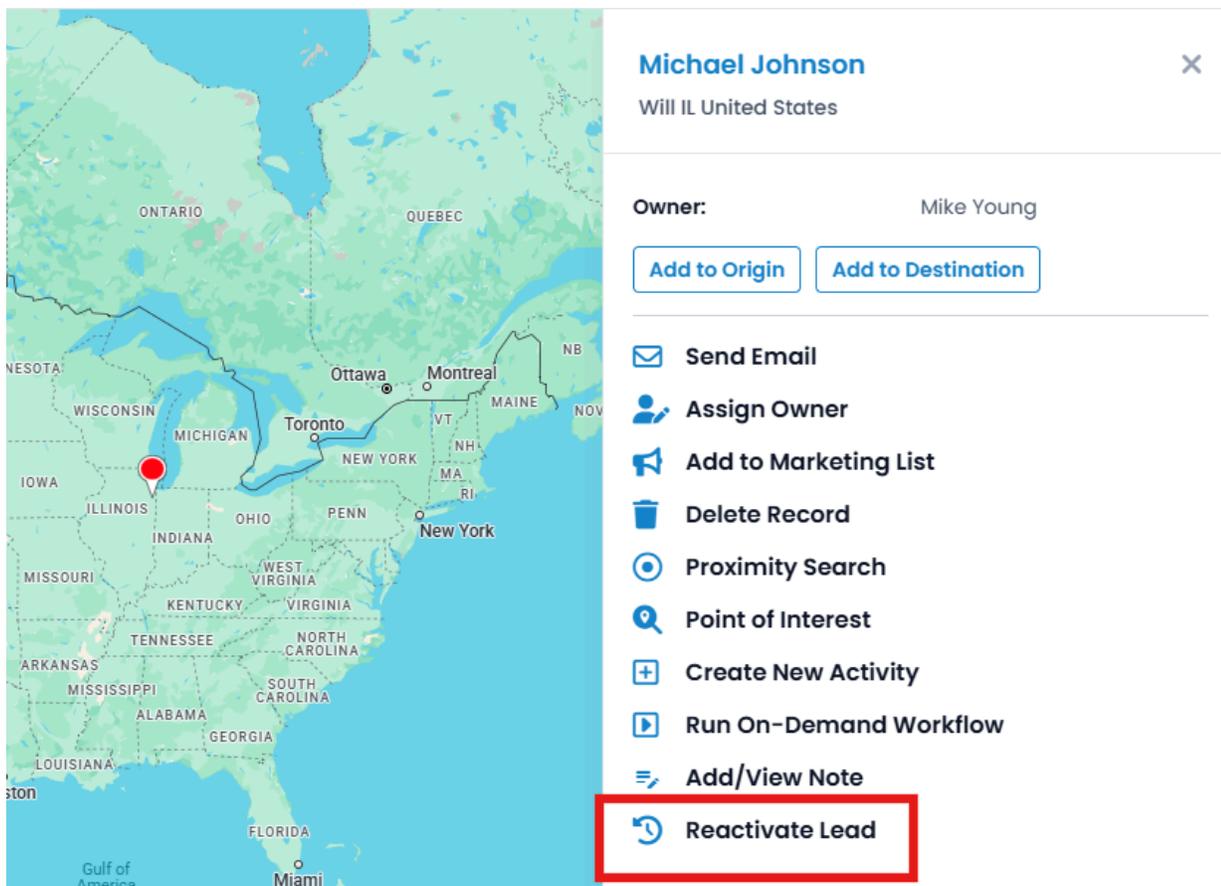
- Also, upon disqualifying lead, user needs to select the reason for disqualifying lead. Reasons can be like Lost, Cannot Contact, No Longer Interested and Canceled. It is available only for lead entity. After you select reason click on Disqualify button to complete the action.



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

Reactivate Lead

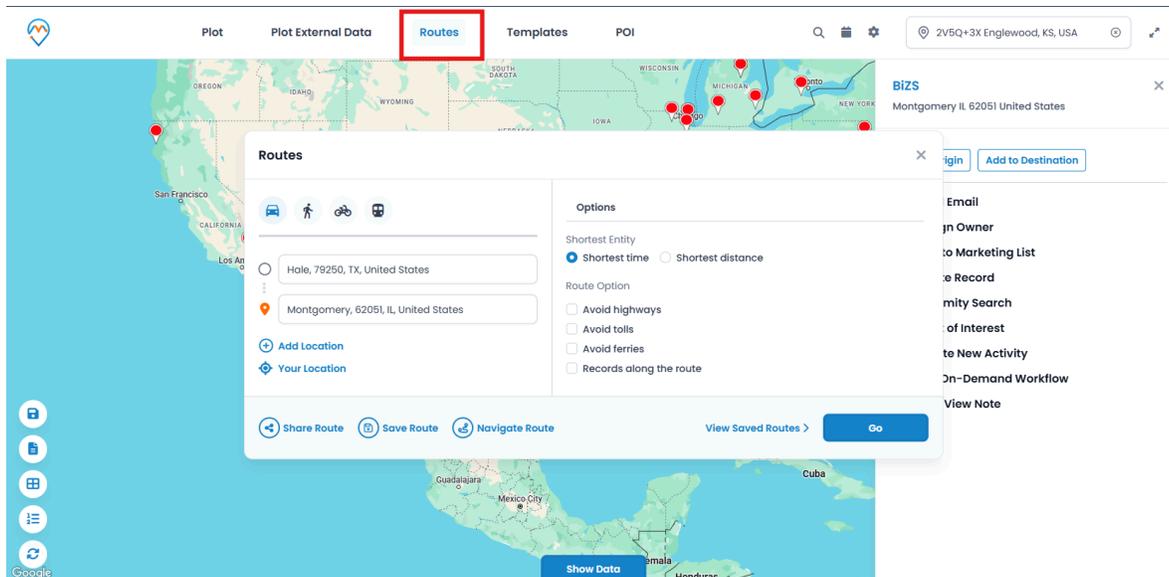
- By clicking on “Reactivate Lead” icon, leads will be reactivated, and its status will be changed to Open.



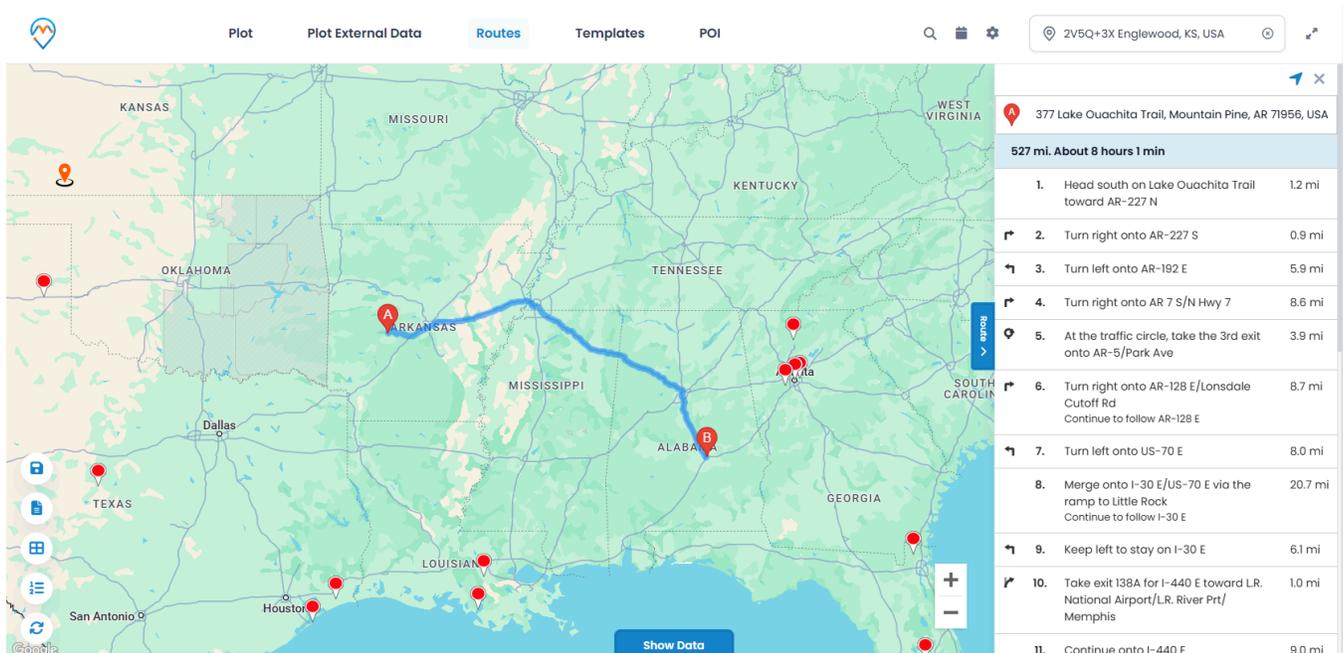
Note: On reactivating lead, view of lead will get updated from closed leads to open leads.

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.



- 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.

Routes ×

Hale, 79250, TX, United States

⋮

 Montgomery, 62051, 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

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

📍 Your Location

Options

Shortest Entity

Shortest time Shortest distance

Route Option

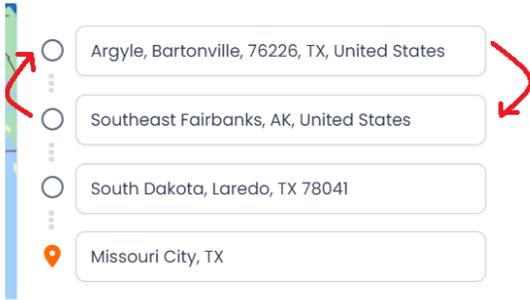
Avoid highways

Avoid tolls

Avoid ferries

Records along the route

 Share Route  Save Route  Navigate Route View Saved Routes > Go



For all the waypoints added in the route, each way point can be dragged to reorder their position in the route.

After reordering the route, it will immediately reflect on the map also.

- 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 ✕

[+ 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

A 101 S Union St, Montgomery, AL 36104, USA

156 mi. About 2 hours 19 mins

1. Head west on Washington Ave
446 ft
2. At the traffic circle, continue straight to stay on Washington Ave
440 ft
3. Turn left onto S Decatur St
0.6 mi
4. Turn left onto Arba St
0.1 mi
5. Take the ramp onto I-85 N Entering Georgia
147 mi
6. Keep left to stay on I-85 N
0.2 mi
7. Take exit 69A to merge onto GA-14 Spur W
2.1 mi
8. Continue onto S Fulton Pkwy
2.7 mi
9. Turn right onto Stonewall Tell Rd
3.4 mi
10. At the traffic circle, take the 1st exit and stay on Stonewall Tell Rd Destination will be on the left
246 ft

B 3820 Stonewall Tell Rd, College Park, GA 30349, USA

Share Route

Routes
✕

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

- 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
🗑️ Save & Close
🔄 Refresh
🔍 Check Access
📎 Attach File
📄 Insert Template
✉️ Insert Signature

Route link - Saved

Email · Email ▾

Email Related ▾

From: Mike Young (Offline) ×

To: ---

Cc: ---

Bcc: ---

Subject: Route link

Segoe UI
9
B
I
U

Hi

Please use the below link to access route in Desktop/Laptop:
[https://www.google.com/maps/dir/Coleman,76873,TX,United+States/Galveston,77590,TX,United+States/\\$&mode=D](https://www.google.com/maps/dir/Coleman,76873,TX,United+States/Galveston,77590,TX,United+States/$&mode=D)

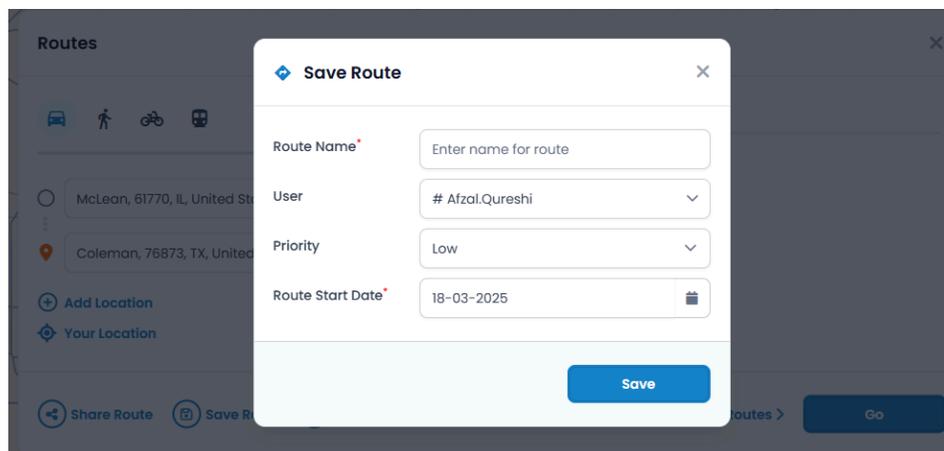
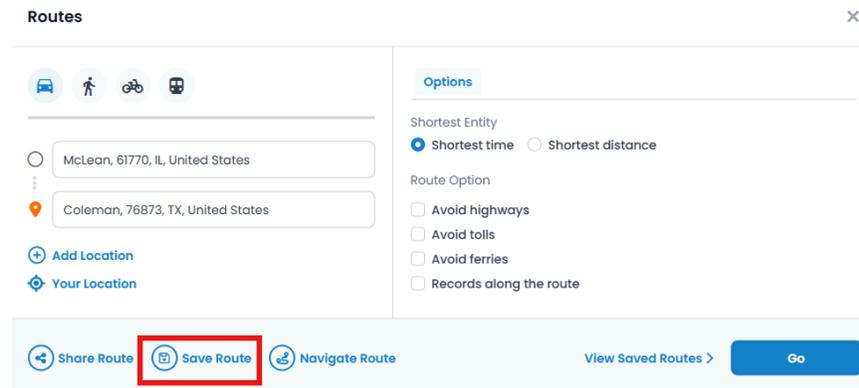
For Smartphone/Tablet, please use following links:
[From: Coleman, 76873, TX, United States](#) , [To: Galveston, 77590, TX, United States](#)

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.

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.



- 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



- [+ 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](#)

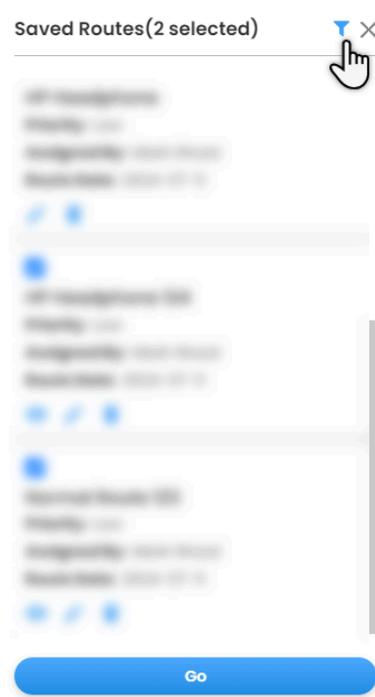
[View Saved Routes >](#)

[Go](#)

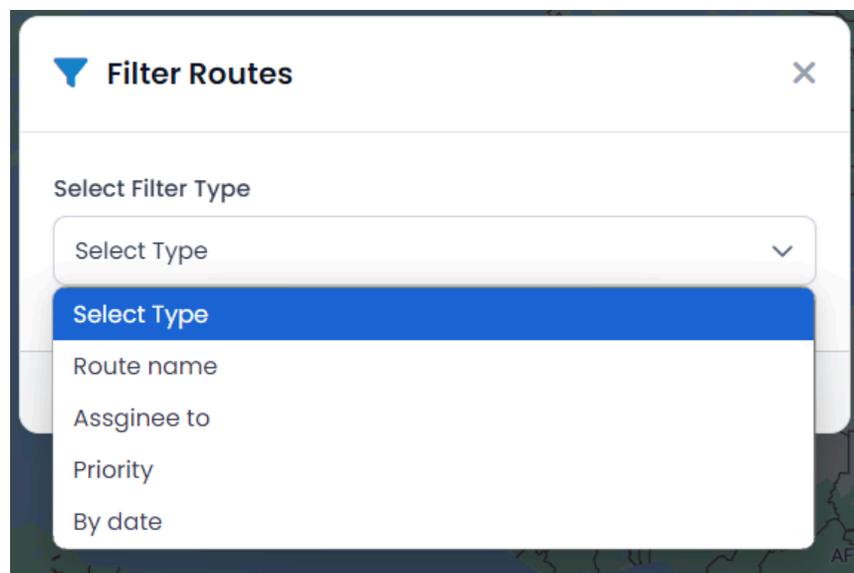
The screenshot shows the 'Routes' page with a map of Texas and a list of saved routes. The map displays various cities and highways. The 'Saved Routes' list includes:

- Business Trip**
Priority: Low
Assigned By: Mike Young
Route Date: 2025-03-06
- Client meeting**
Priority: High
Assigned By: Mike Young
Route Date: 2025-03-21
- Product Distribution**
Priority: Normal
Assigned By: Mike Young
Route Date: 2025-03-28
- Client meeting route**
Priority: Low
Assigned By: Mike Young
Route Date: 2025-03-06

- 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

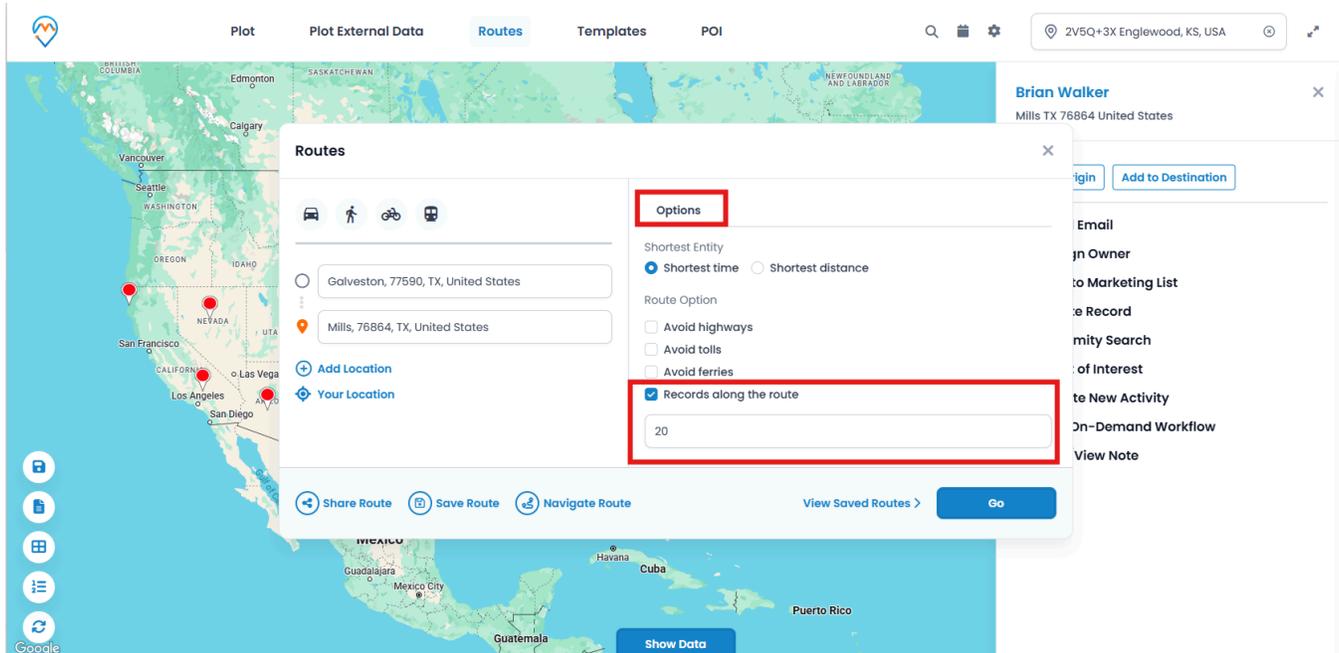


- You can also apply various filters on route by clicking on “Options” dropdown. Various filters related to Distance are:
- Route Name
- Assignee to
- Priority
- Date

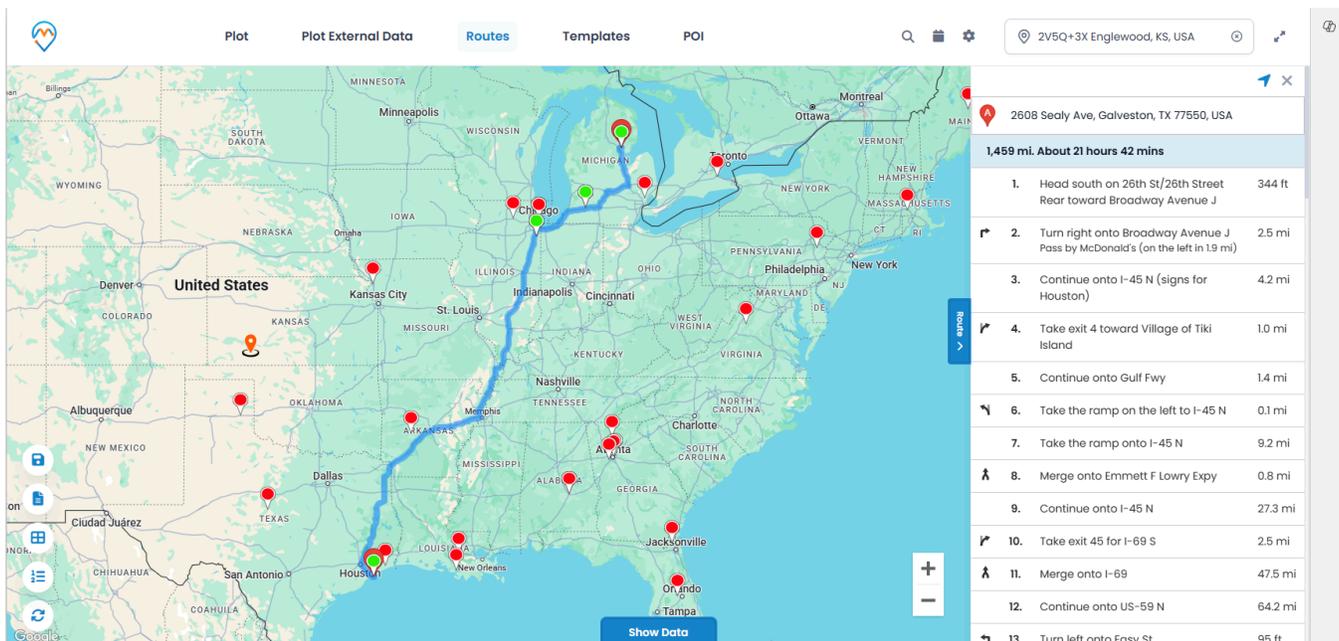


Along Route

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

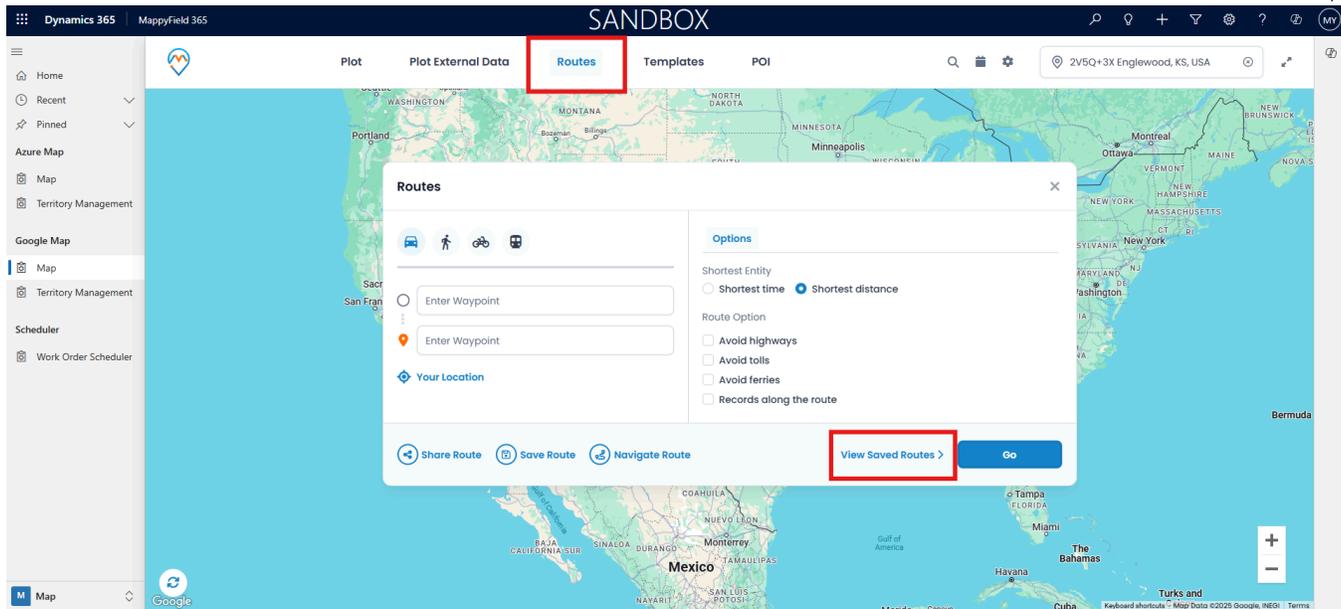


- Now, selecting **Along the route** search option displayed in the **Options** drop down section prompts the user to enter search radius and its unit.
- By default, it can be managed from the configurations. This would search records within the given radius of the plotted route and displays pin in different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

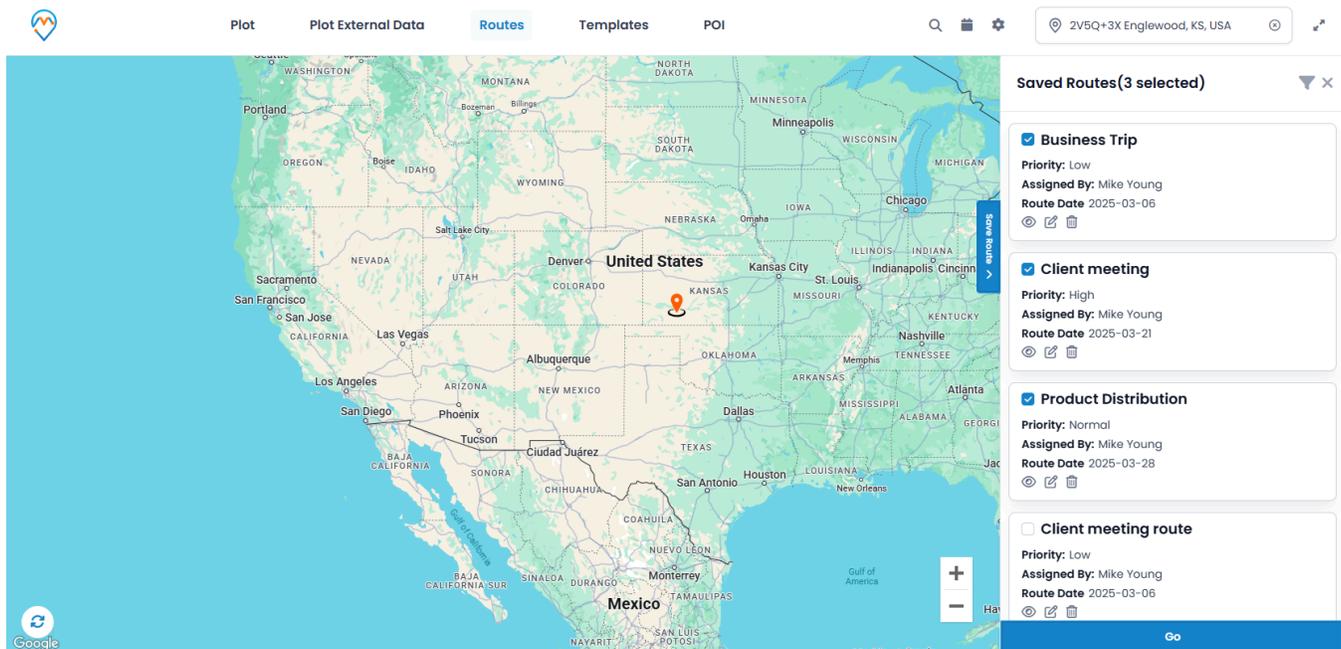


Multiple Saved Routes

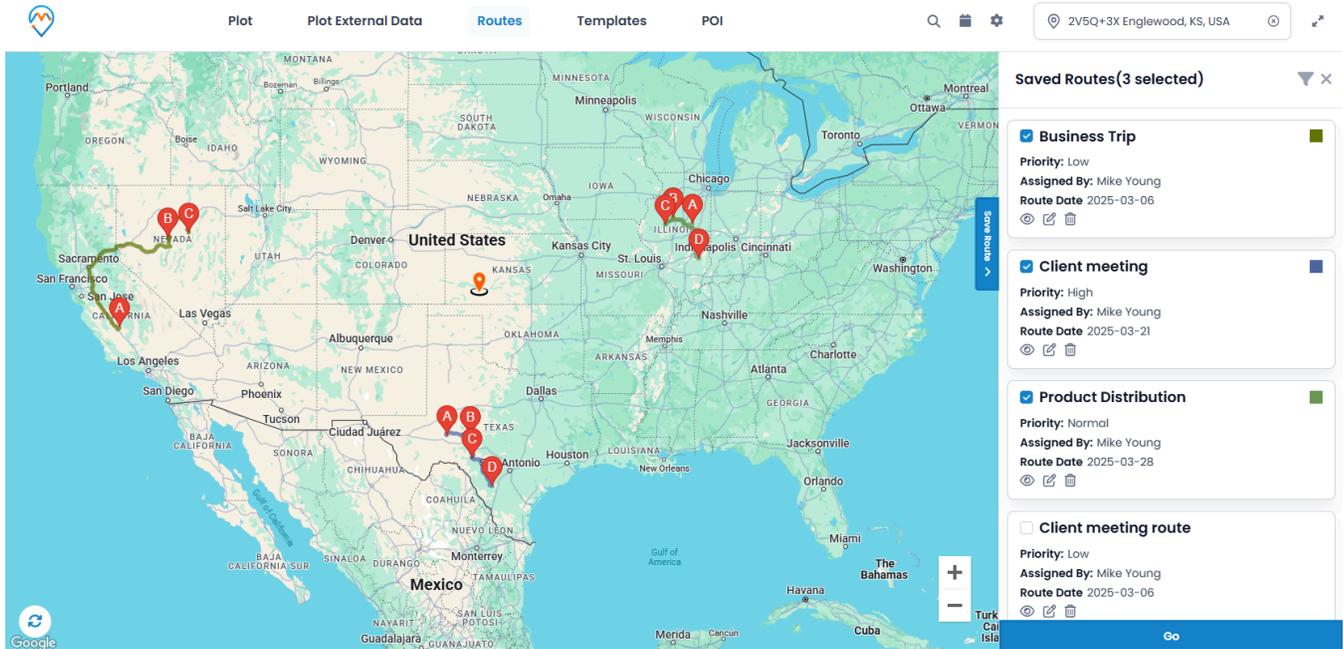
You can plot multiple addresses at a time on the map. In order to do so, navigate to Routes and click on Saved Routes.



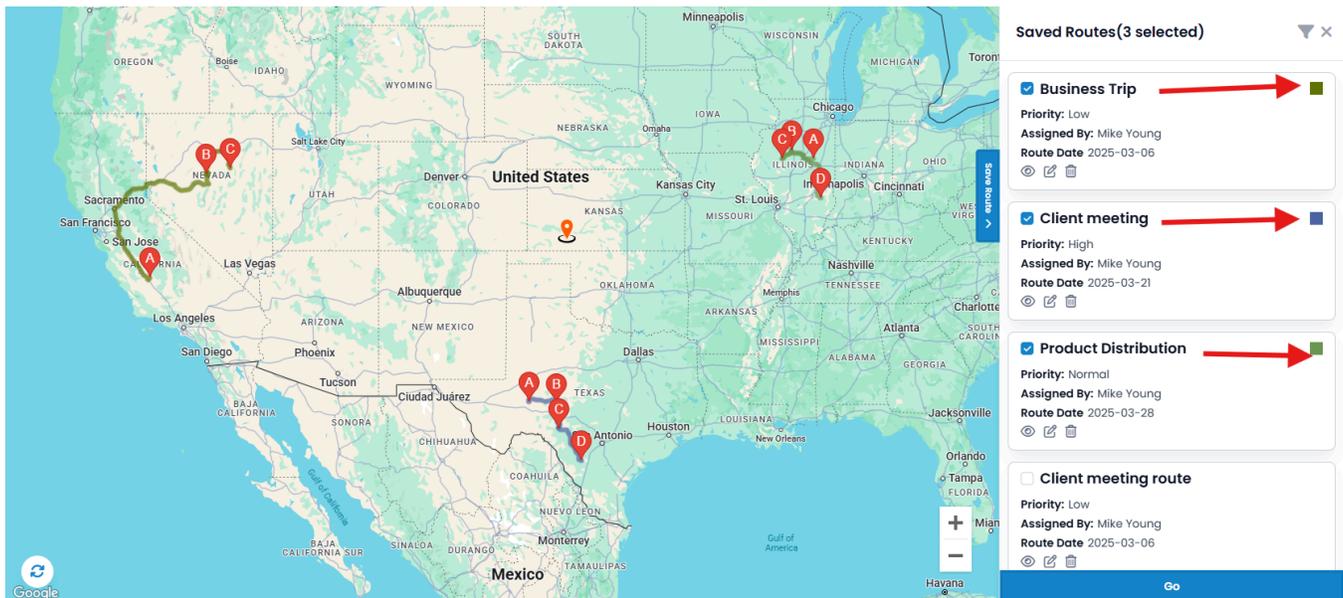
A slider will be displayed consisting of all the saved routes. Select the routes you want to view on the map.



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



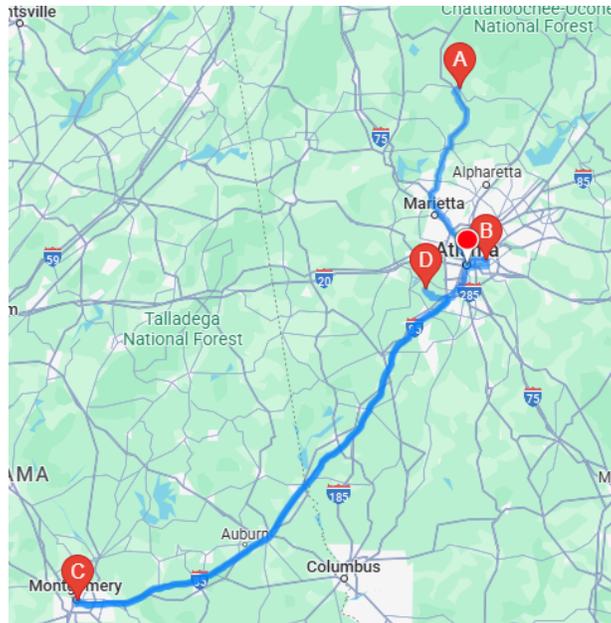
The colors of the routes are mentioned in front of the respective routes in the Saved Routes slider.



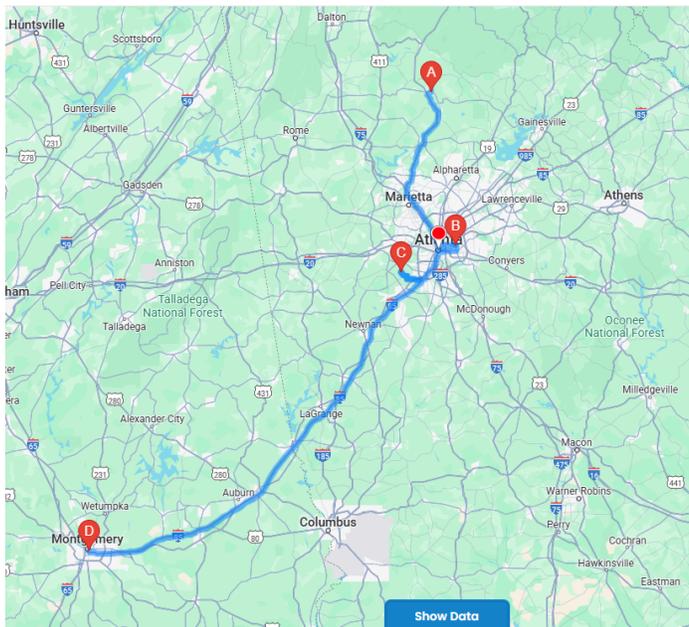
SPF (Shortest Path First)

- 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



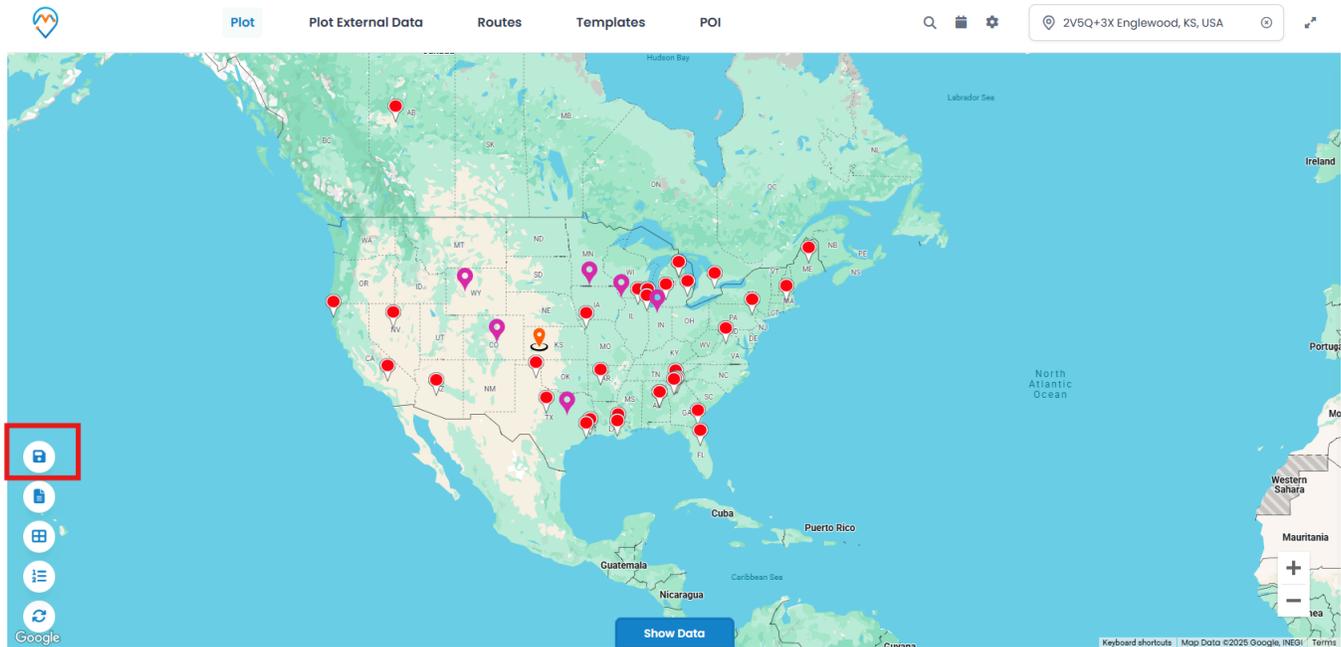
After SPF



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

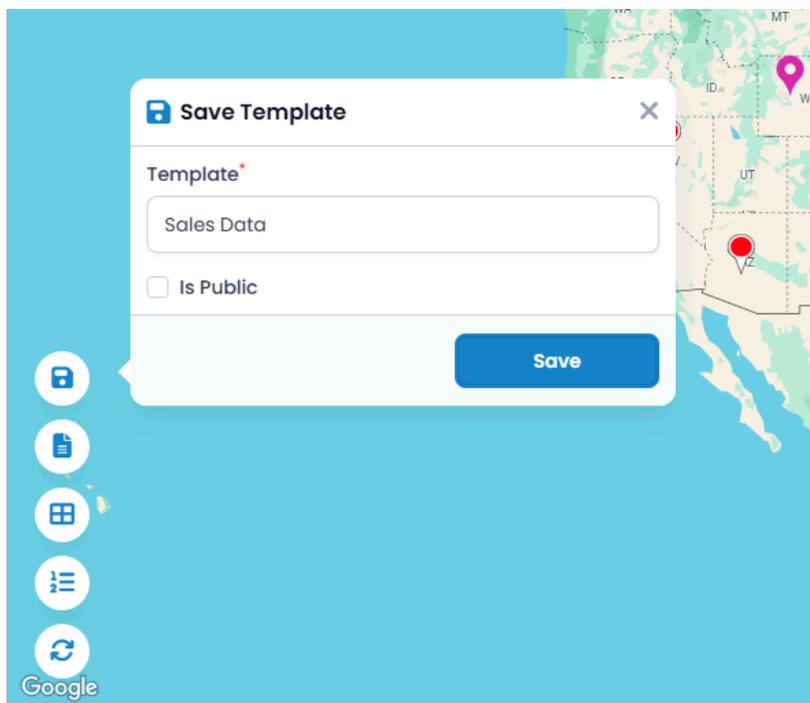
Templates

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

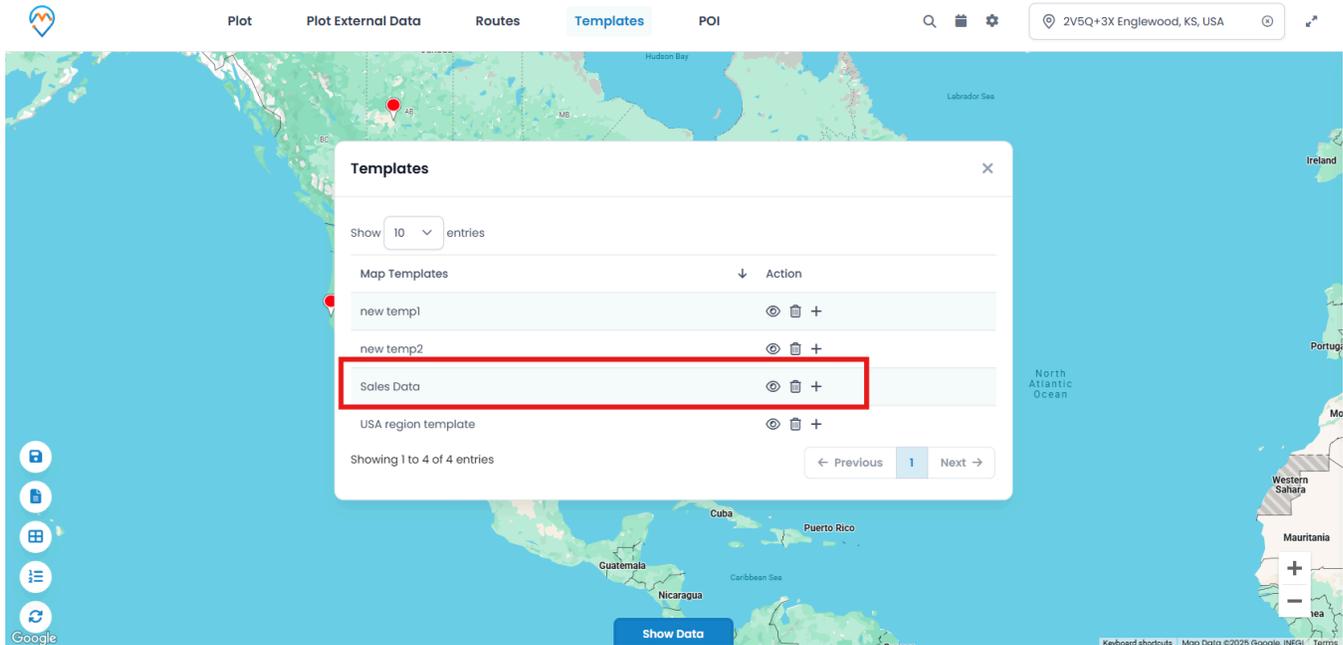


- If you've selected **Is Public** for the Template at the time of saving, it will be visible to all CRM users of AppJetty MappyField 365.

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



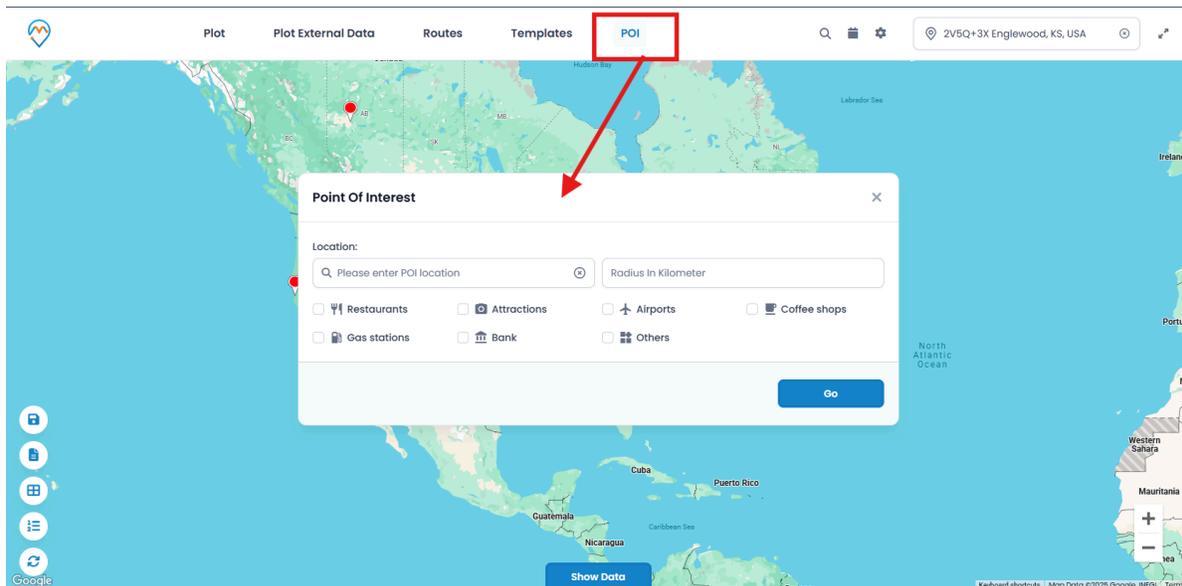
- Under the Templates section, logged in users can see all the templates created by them or the templates that are made public.



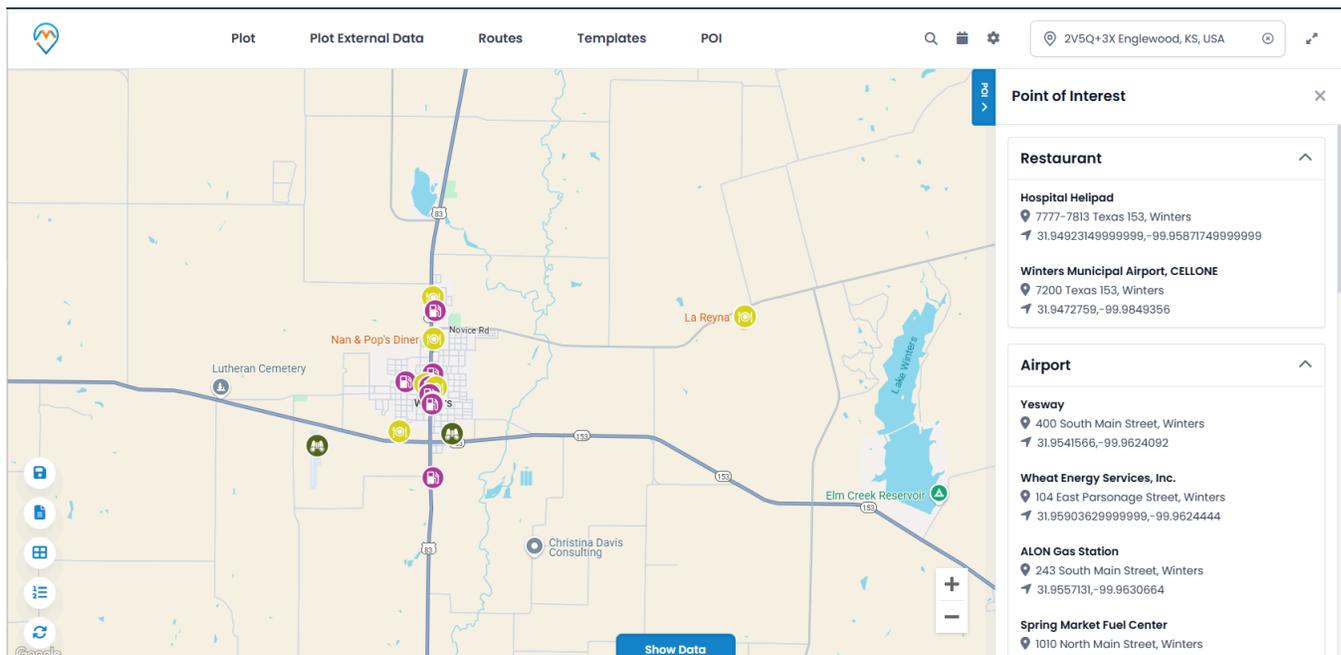
- The templates can be previewed by clicking on View icon  or You can delete as per your requirement.
- Through the **Plus icon**, you will be able to make that particular template, default.

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.

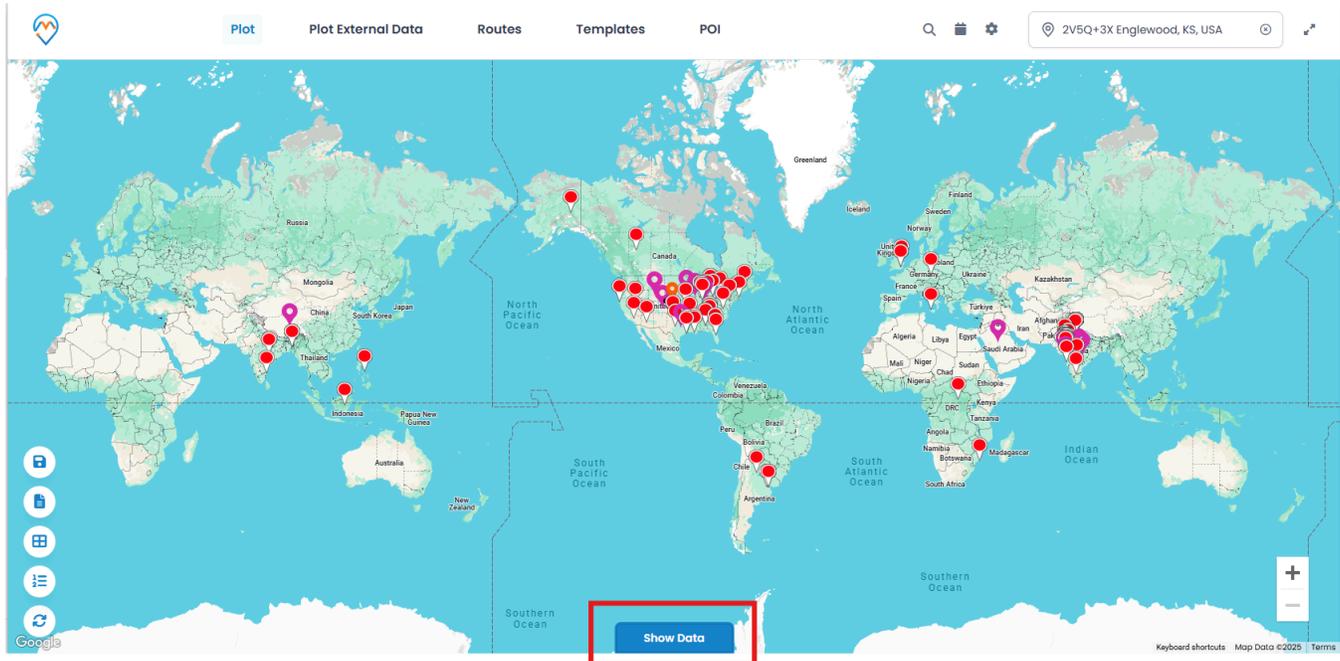


- Under the **POI** tab, select the location/place which you want to search.
- After selecting the POI Location, click on the **GO** button to plot the records of the POI on the map.

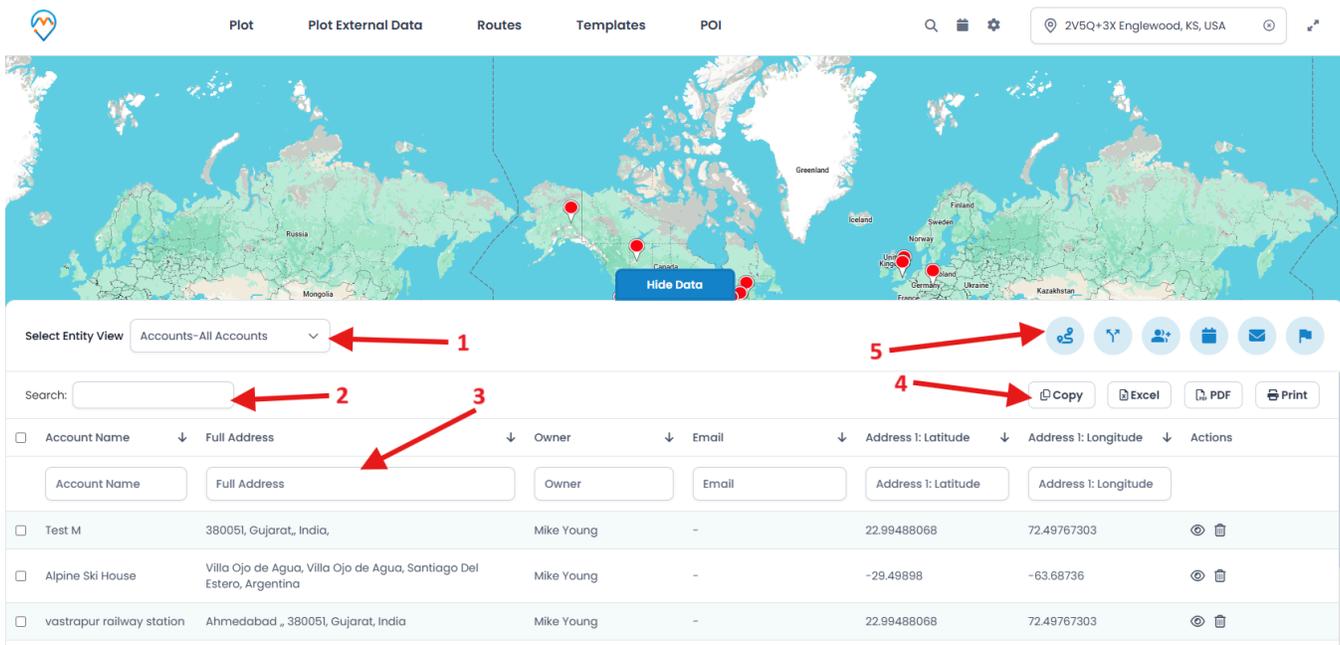


Data Grid

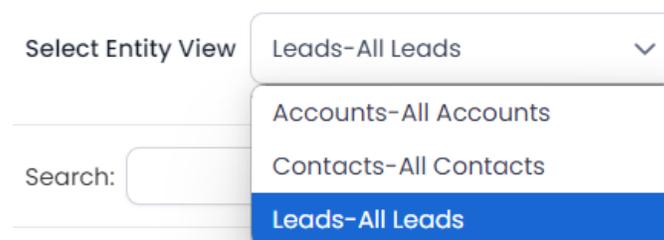
- **Data Grid** provides a listing of records which are plotted on the map. You can perform the different actions and manage the records from the Data Grid.
- To view the plotted records in the data grid, click on **Show Data**.



- 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



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



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



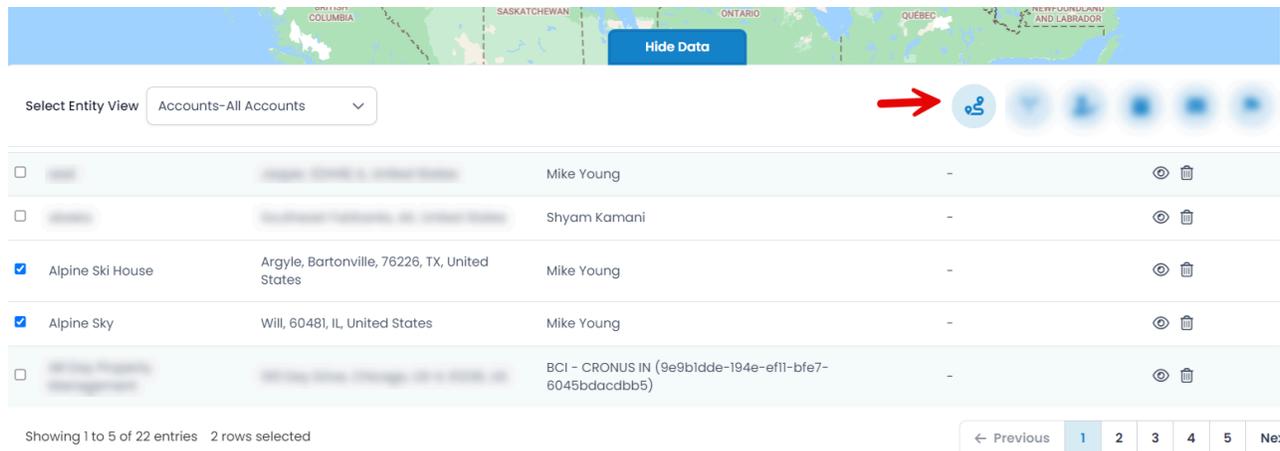
- By clicking on **View** icon , that record will get opened in CRM. By clicking on **Delete** icon , it deletes the respective record from the CRM.

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.



The screenshot shows a data grid with the following rows:

Entity View	Account Name	Address	Owner	Priority	Actions
<input type="checkbox"/>	[Blurred]	[Blurred]	Mike Young	-	 
<input type="checkbox"/>	[Blurred]	[Blurred]	Shyam Kamani	-	 
<input checked="" type="checkbox"/>	Alpine Ski House	Argyle, Bartonville, 76226, TX, United States	Mike Young	-	 
<input checked="" type="checkbox"/>	Alpine Sky	Will, 60481, IL, United States	Mike Young	-	 
<input type="checkbox"/>	[Blurred]	[Blurred]	BCI - CRONUS IN (9e9b1dde-194e-ef11-bfe7-6045bdacdbb5)	-	 

Showing 1 to 5 of 22 entries 2 rows selected

Navigation: < Previous | 1 | 2 | 3 | 4 | 5 | Next >

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 5:00 PM

Select Activity Meeting

Start Location* Texas City, TX

[Review + Create](#)

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

Review Activity

Duration 30 minutes 24-10-2024

Set Duration for all Marketing visit-10/24/2024

Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	

← Previous 1 Next →

[Create](#)

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

Review Activity



Duration

30 minutes

24-10-2024

Set Duration for all

Marketing visit-10/24/2024



Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	

← Previous 1 Next →

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



Duration

30 minutes

24-10-2024

Set Duration for all

Marketing visit-10/24/2024

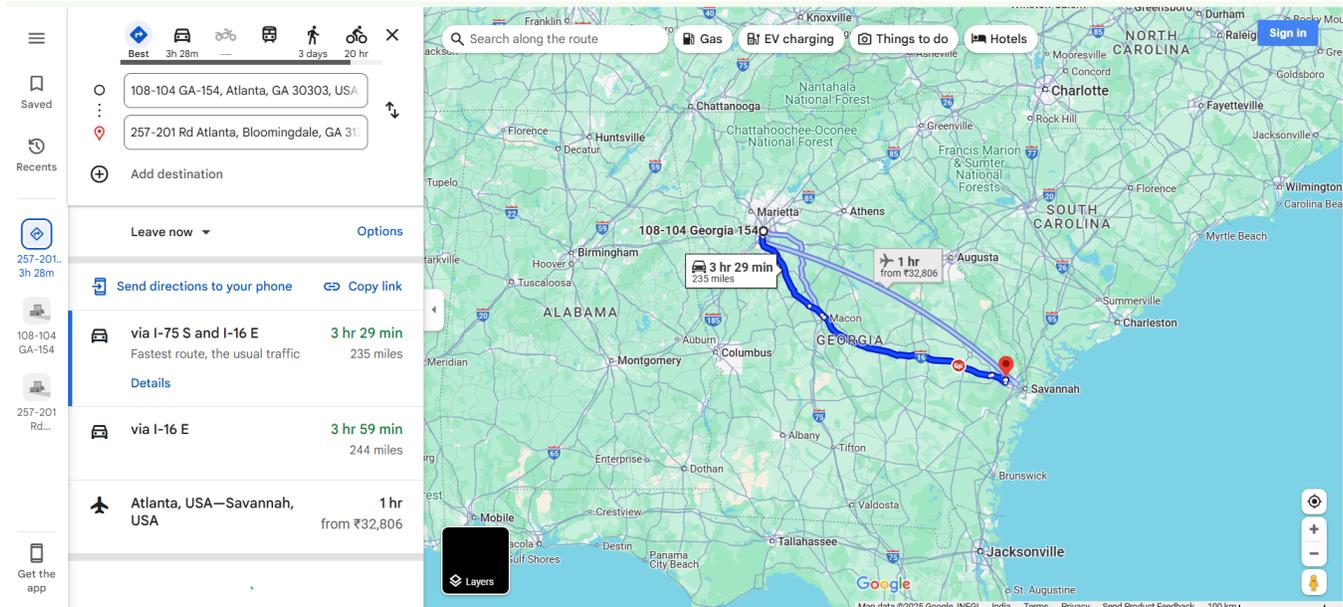


Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With Alpine Ski House	Alpine Ski House	30 Min	1:31 PM	2:01 PM	

← Previous 1 Next →

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





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.

Review Activity
✕

Duration

30 minutes

24-10-2024

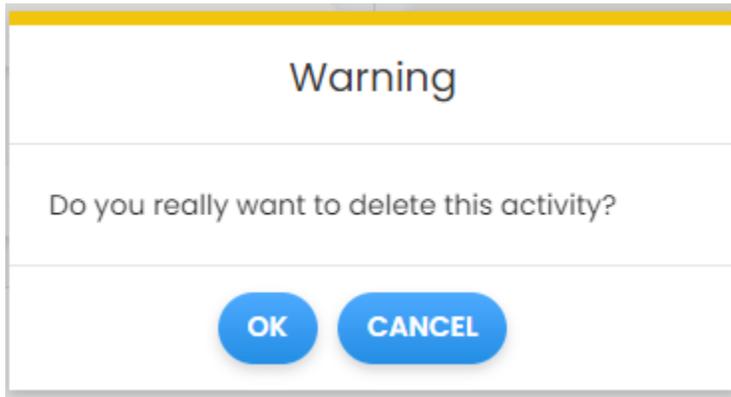
Set Duration for all Marketing visit-10/24/2024

Subject	↓ Regarding	Duration	Start Date	End Date	Action
Appointment With Peter	Peter	30 Min	12:49 PM	1:19 PM	

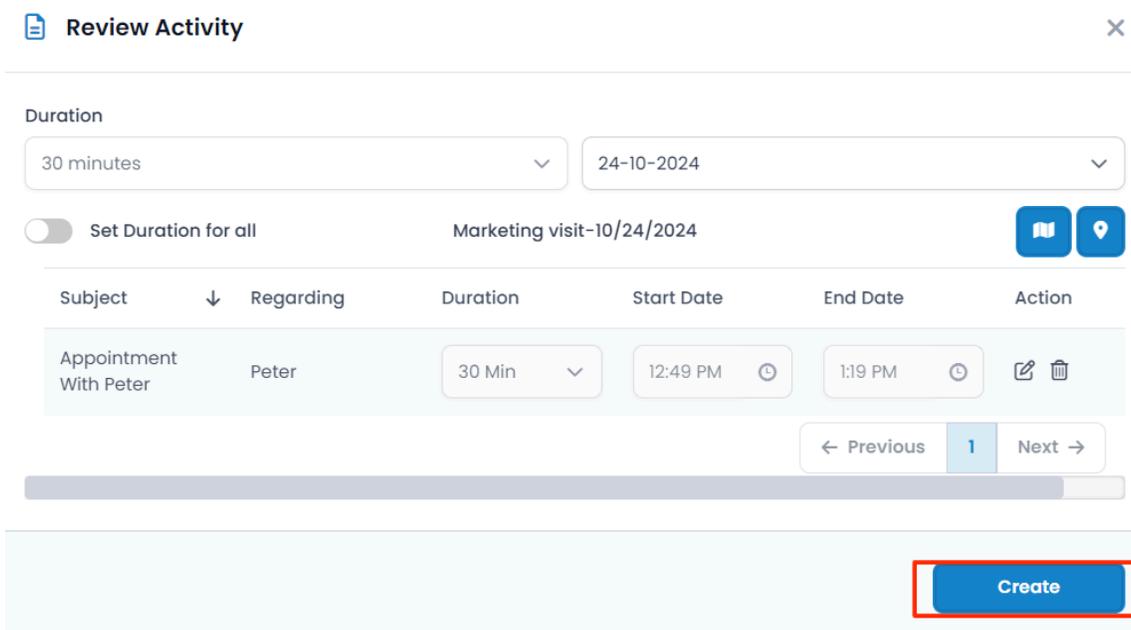
← Previous 1 Next →

Create

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**.

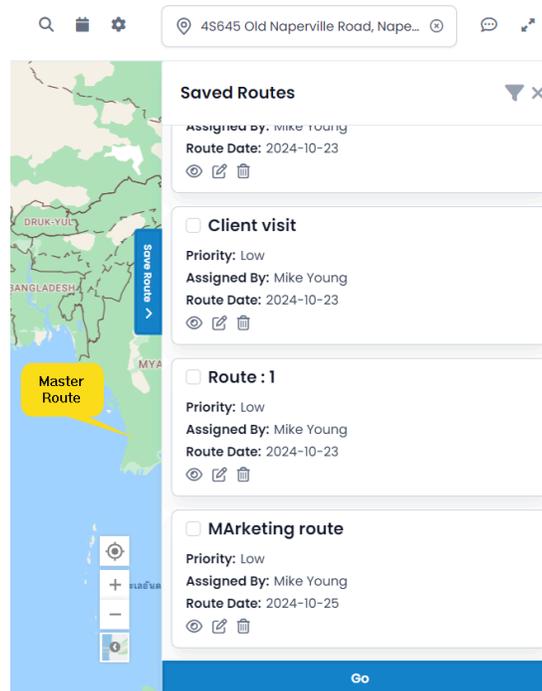


Now once all the configurations have been set, click on **Create**.

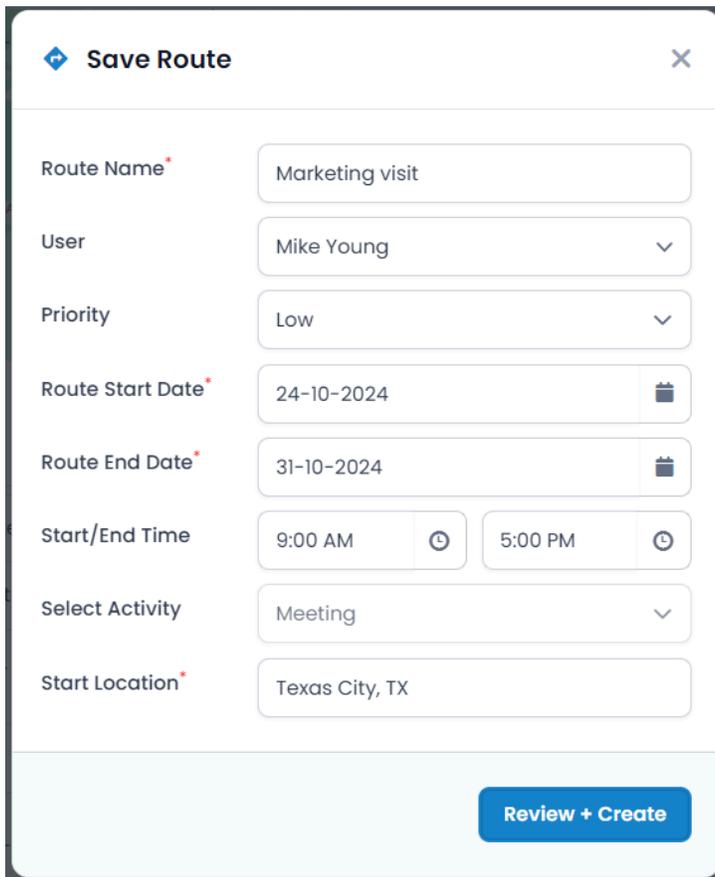


This created route and the activity will then be displayed in the **Saved Route**. Here as this is a **Master Route** you will not be able to view it. But for the child routes, along with Edit and Delete you will be able to View them.

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 visit

User Mike Young

Priority Low

Route Start Date* 24-10-2024

Route End Date* 31-10-2024

Start/End Time 9:00 AM 5:00 PM

Select Activity Meeting

Start Location* Texas City, TX

Review + Create

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

Review Activity ✕

Duration

30 minutes ▼ 25-10-2024 ▼

Set Duration for all Marketing route-10/25/2024  

Subject	Regarding	Duration	Start Date	End Date	Action
Appointment With biztech ac	biztech ac	30 Min ▼	1:39 PM 🕒	2:09 PM 🕒	 

← Previous 1 Next →

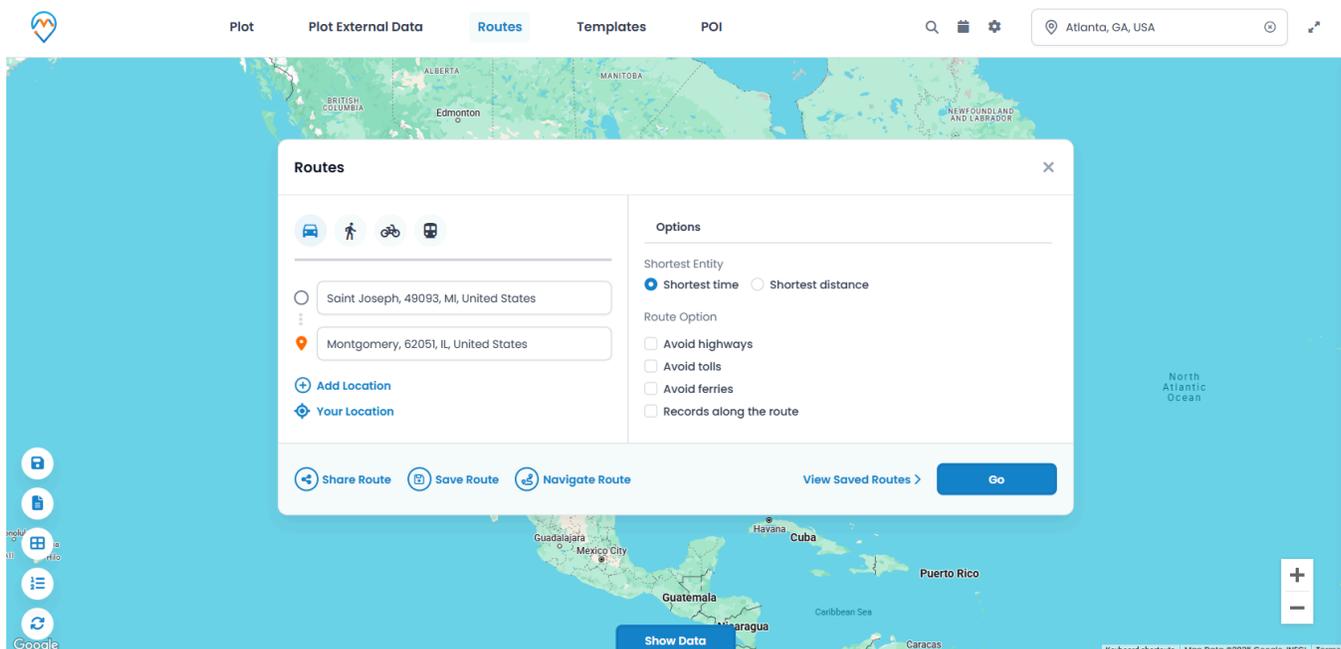
Update

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.

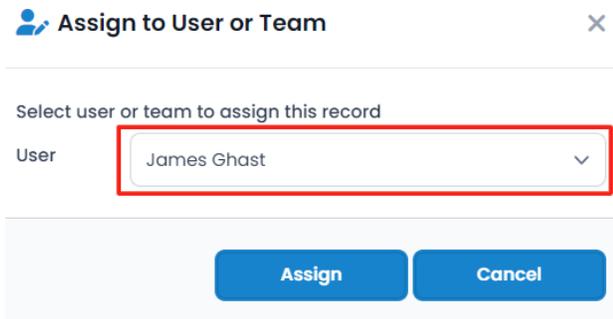


Note: If you proceed to perform any action from the data grid without selecting any record, you will get the Alert message that will prompt you to select the record.

Assign to User/Team:

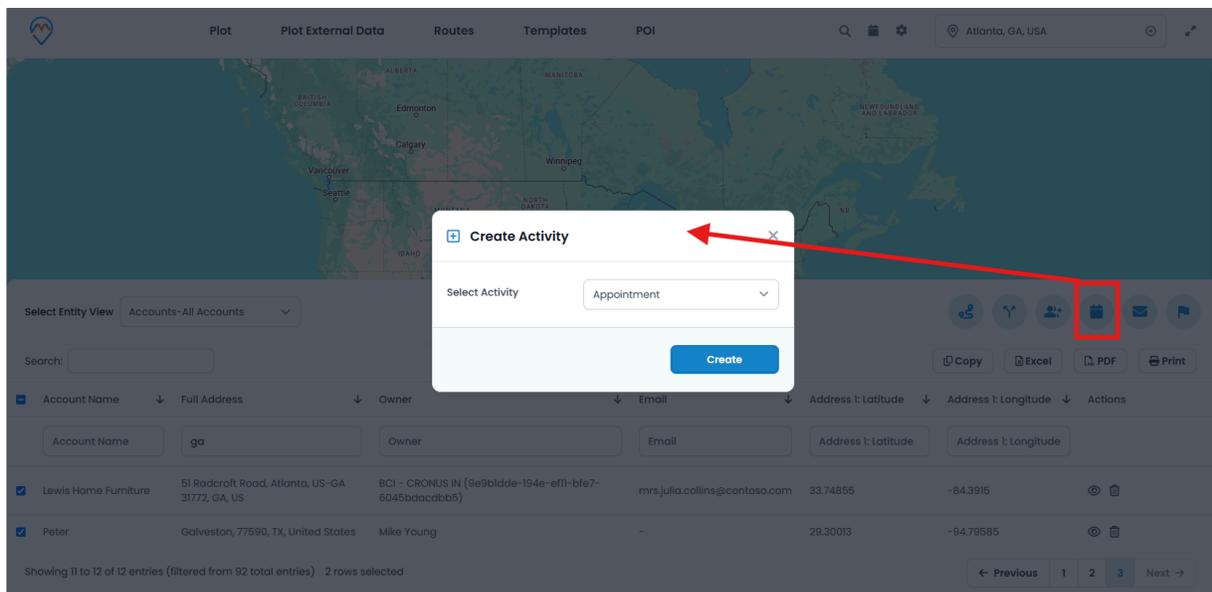


You can directly assign the selected record to the User / Team.



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.

✉ **Send Email** ✕

Select Email Template

New Email ▼

Send Email

Manage Territory



🚩 **Manage Territory** ✕

Territory

Nevada ▼

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

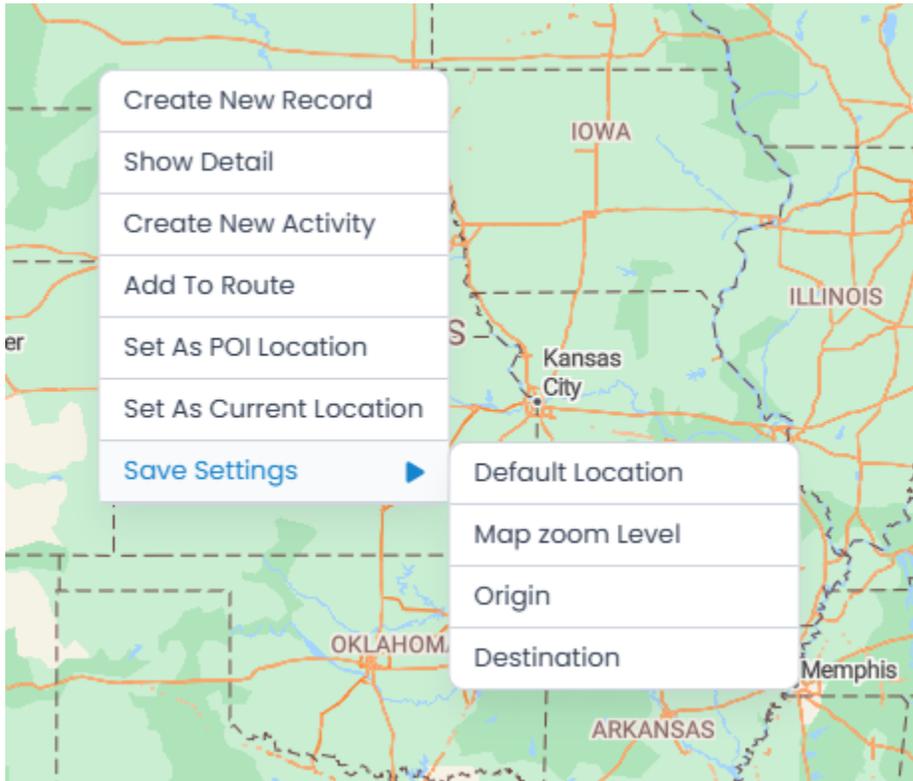
'Right click' on the map to open the Context M

- It provides options as below:

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

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

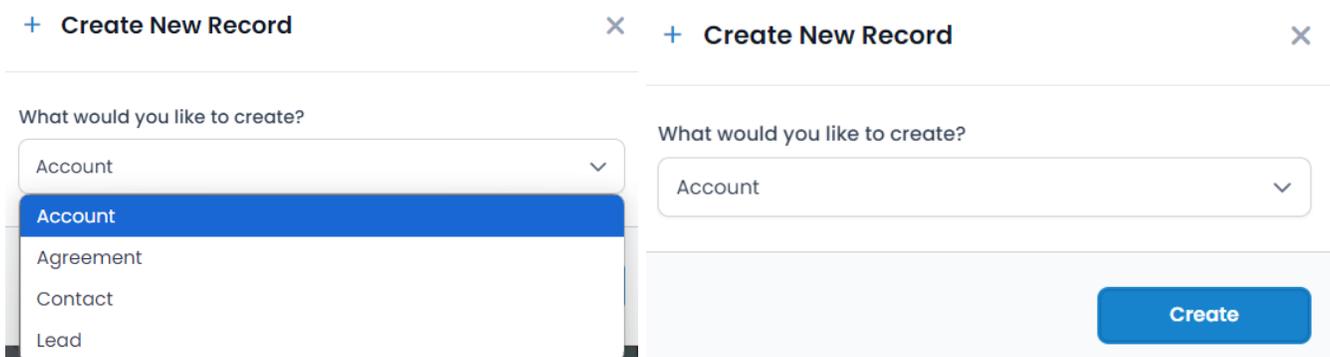
> Default Location > Map zoom level > Origin > Destination.



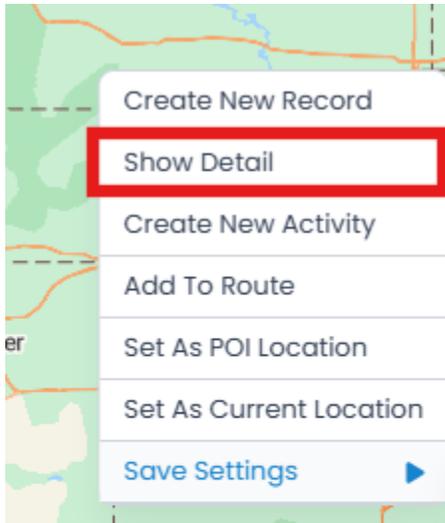
- These settings directly get saved under MappyField 365 Configuration record for logged in users.
- By selecting Create New Record Option, open a dialog box to select record type.

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.

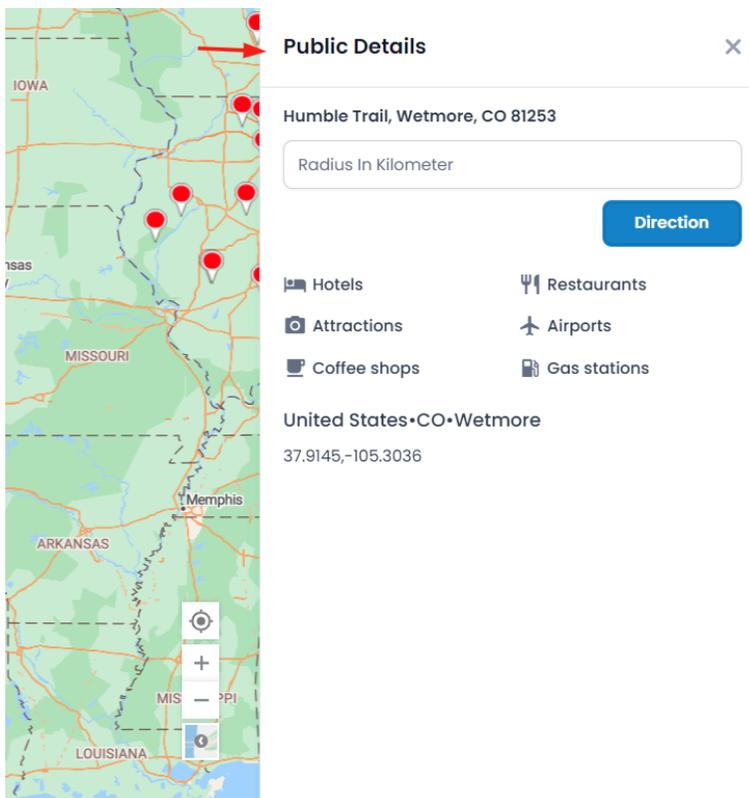


Show Detail

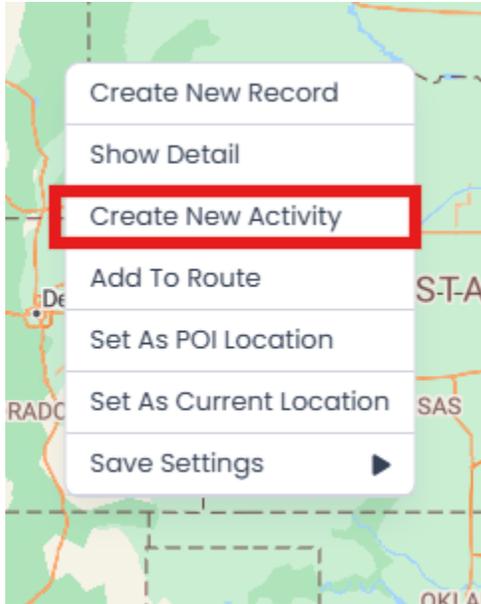


By clicking on the **Show Detail** option from the Context Menu, you will get the popup window of the 'Public Details' from the right side as per the location.

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

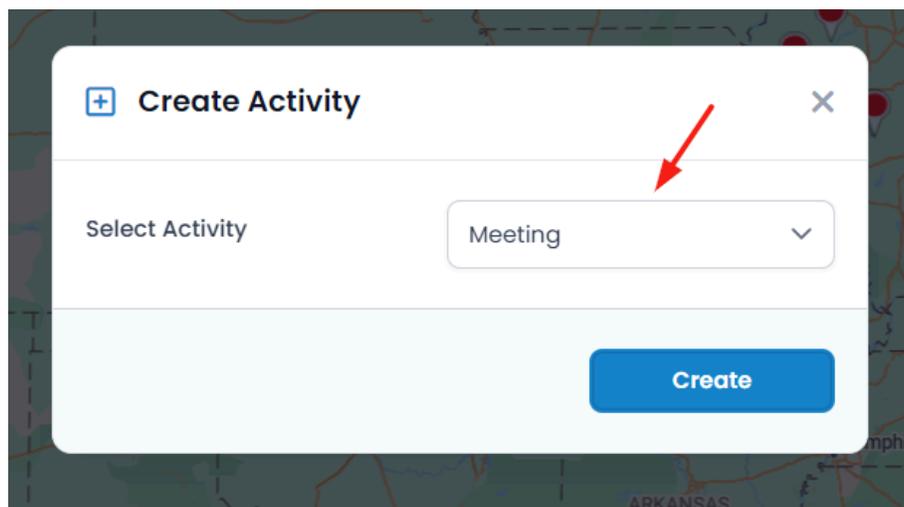


Create New Activity



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.



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

Quick Create: Meeting ✕

Owner * MY Mike Young ✕

Required Attendees ---

Optional Attendees ---

Subject * ---

Location ---

Teams meeting No

APPOINTMENT DETAILS

Start Time * 10/24/2024 🗓
3:00 PM ⌵

End Time * 10/24/2024 🗓
3:30 PM ⌵

All Day Event

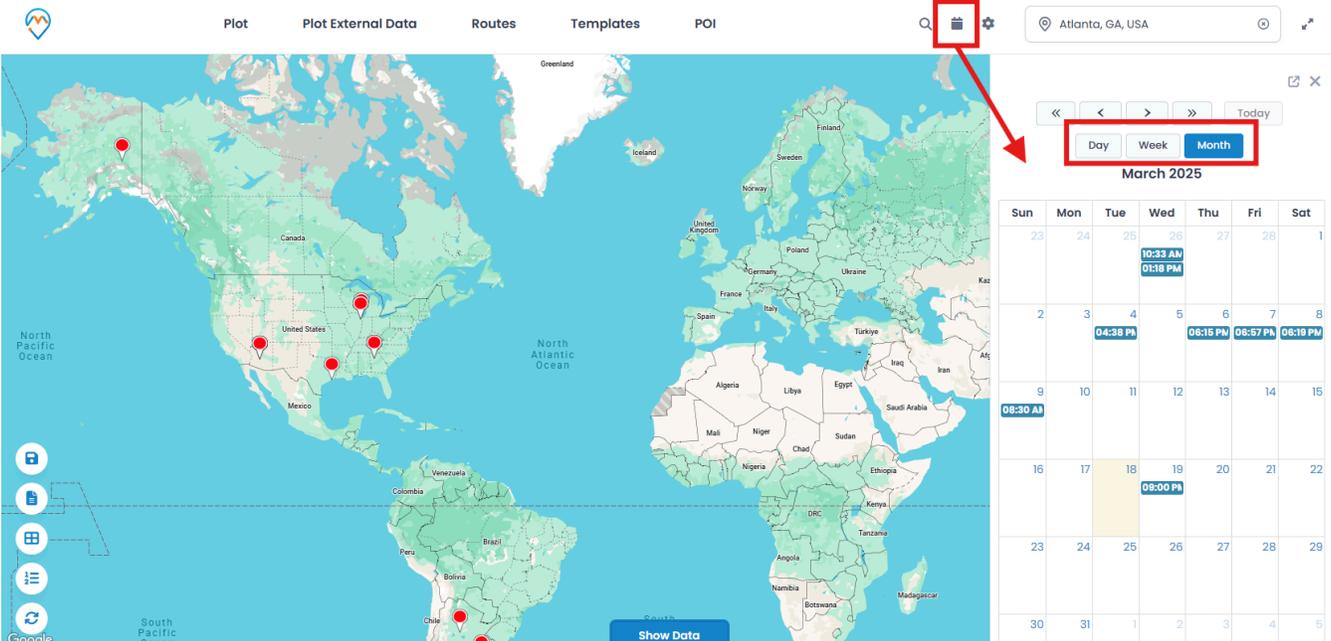
Duration 30 minutes ⌵

Save and Close Cancel

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

Calendar View

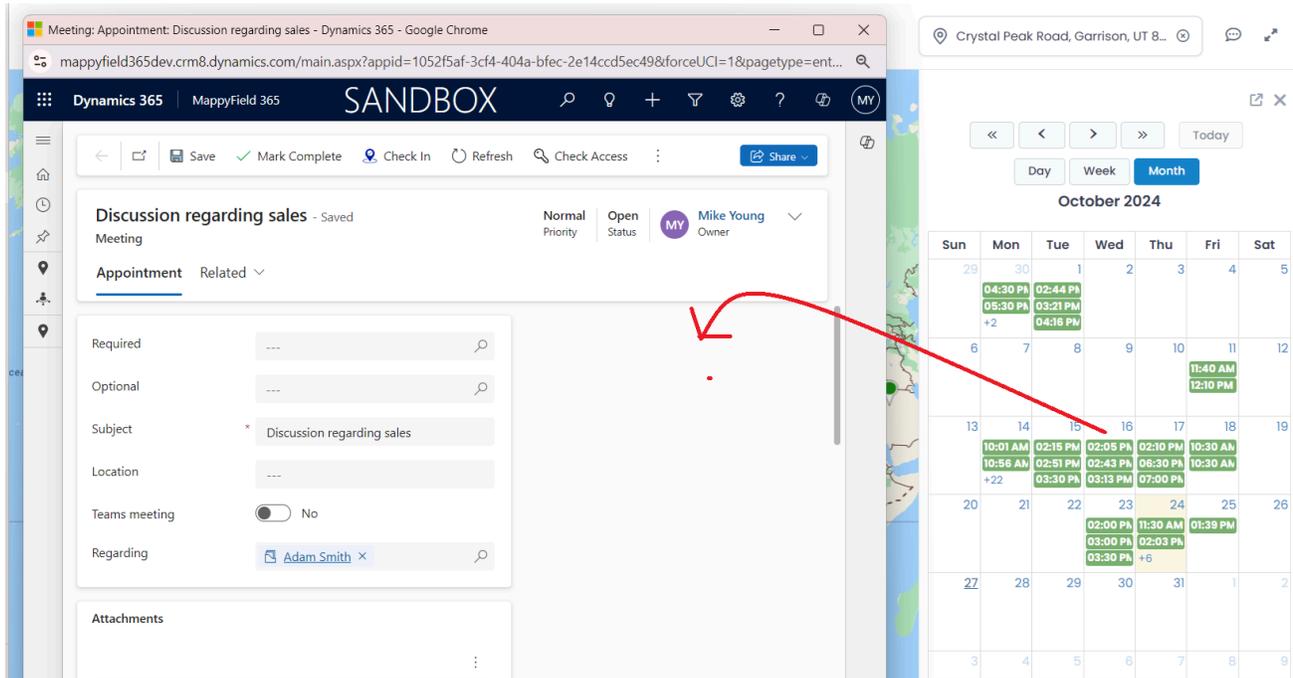
- You can also view the plotted activity records in the calendar view along with the Map view.



The screenshot shows the app interface with a map on the left and a calendar view on the right. The calendar view is for March 2025 and shows activity records for various dates. A red box highlights the calendar view, and a red arrow points to the calendar view from the map view.

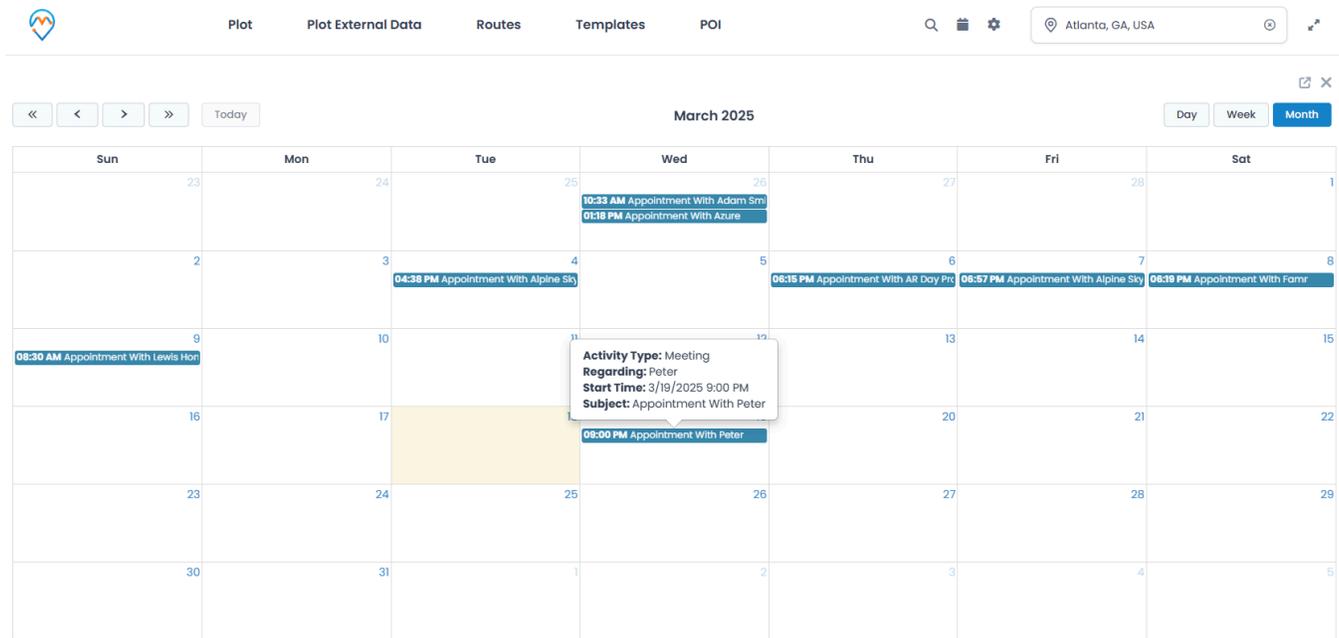
Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1
			10:33 AM 01:18 PM			
2	3	4	5	6	7	8
		04:38 PM		08:15 PM 08:57 PM	08:19 PM	
9	10	11	12	13	14	15
08:30 AM						
16	17	18	19	20	21	22
		08:00 PM				
23	24	25	26	27	28	29
30	31	1	2	3	4	5

- 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.



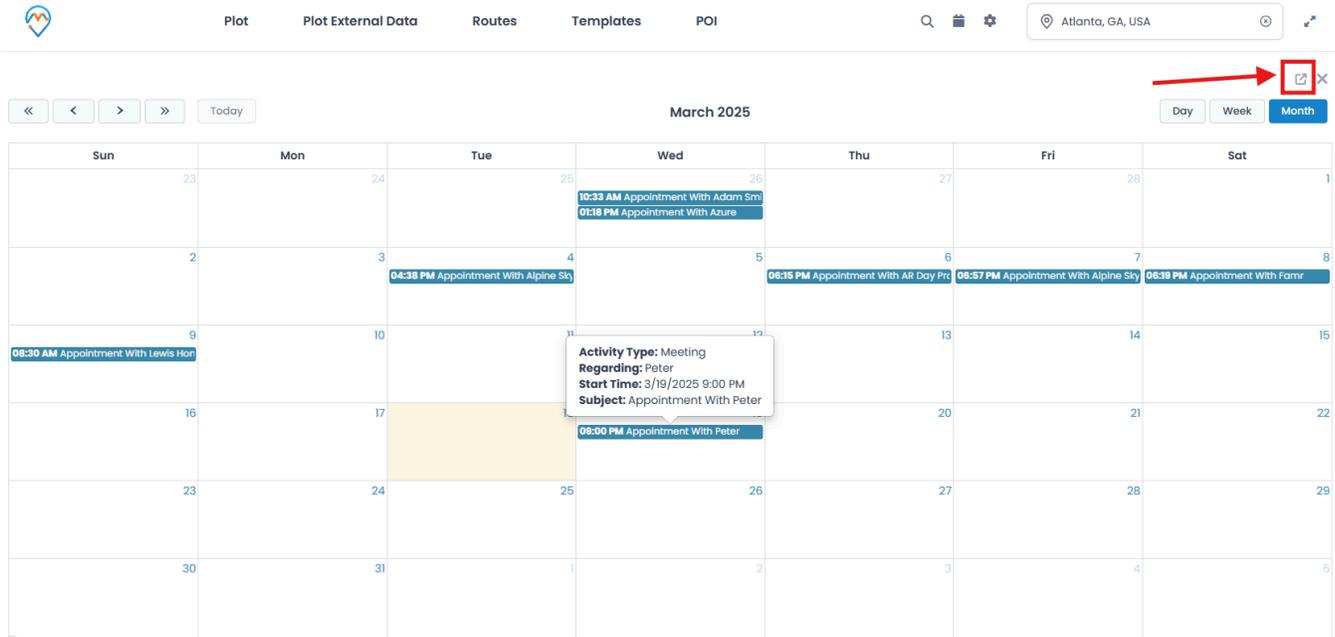
The screenshot shows the Dynamics 365 interface. On the left, there is a navigation pane with a home icon, a clock icon, and a location pin icon. The main area displays a meeting appointment card titled "Discussion regarding sales" with a status of "Normal", "Open", and owner "Mike Young". Below the card, there are fields for "Required", "Optional", "Subject" (Discussion regarding sales), "Location", "Teams meeting" (No), and "Regarding" (Adam Smith). On the right, a calendar view for October 2024 is shown, with a red arrow pointing from a meeting slot on the 15th to the appointment card.

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

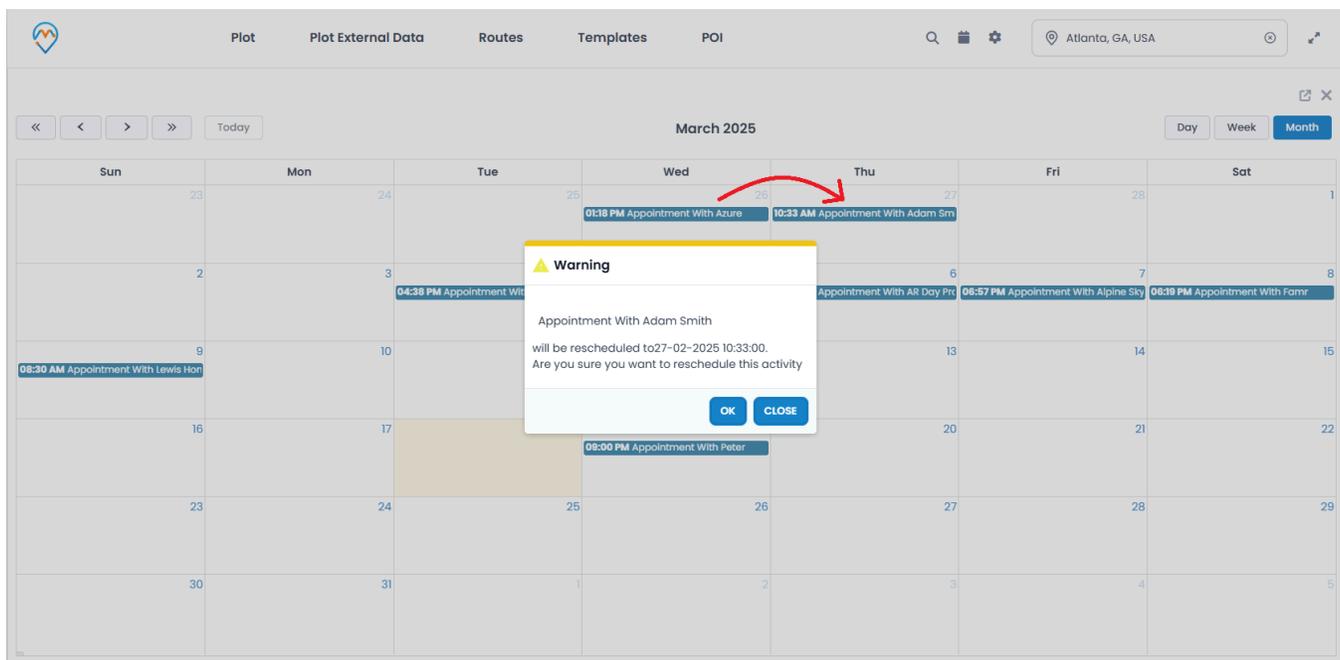


The screenshot shows a calendar interface for March 2025. The calendar is displayed in a grid view with columns for days of the week and rows for dates. Several appointments are visible, including "Appointment With Adam Sim", "Appointment With Azure", "Appointment With Alpine Sky", "Appointment With AR Day Pr", "Appointment With Lewis Hor", and "Appointment With Peter". A detailed activity card is shown for the meeting on March 19th, 2025, at 9:00 PM, regarding Peter.

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

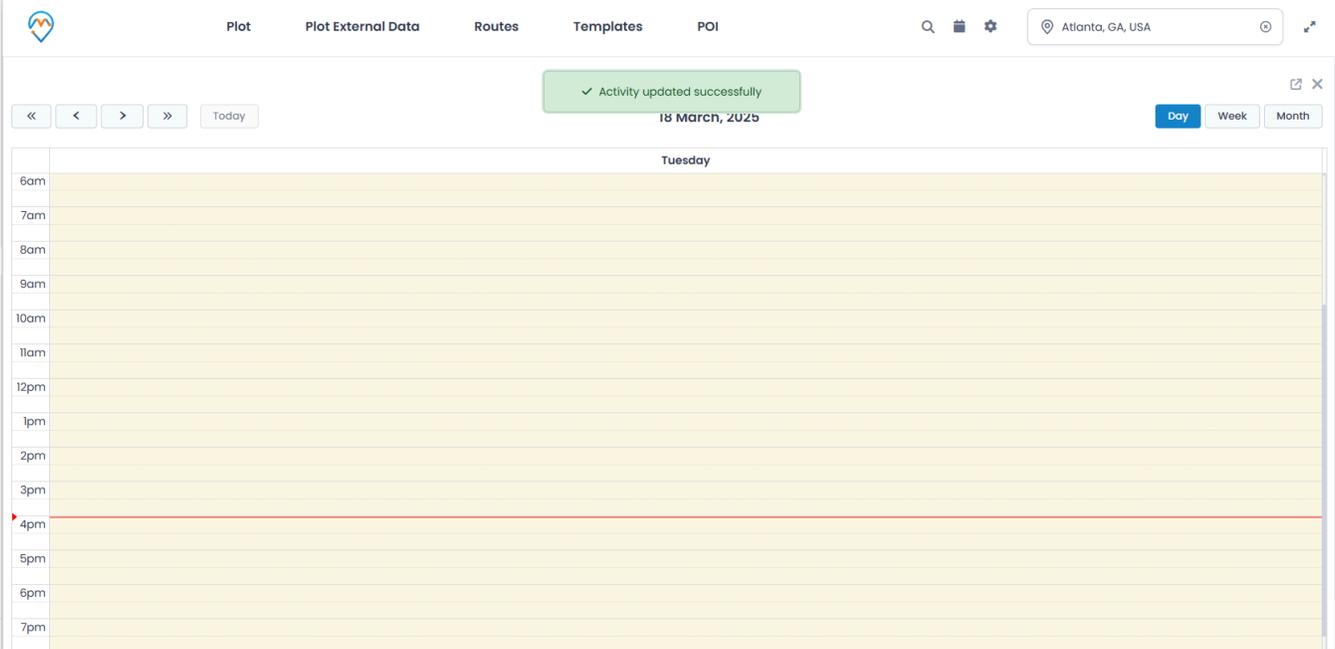


- You can also reschedule the activity by dragging and dropping to a particular date.

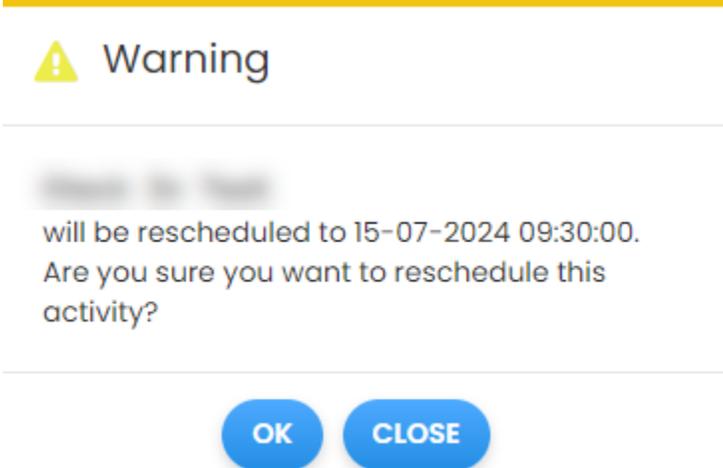


- After dragging and dropping the activity a warning message will popup on the screen. Click on OK to re-schedule the activity.
- **Activity updated successfully** message will appear on the screen.

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



- 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.

✓ Activity updated successfully



Today

28 March, 2023

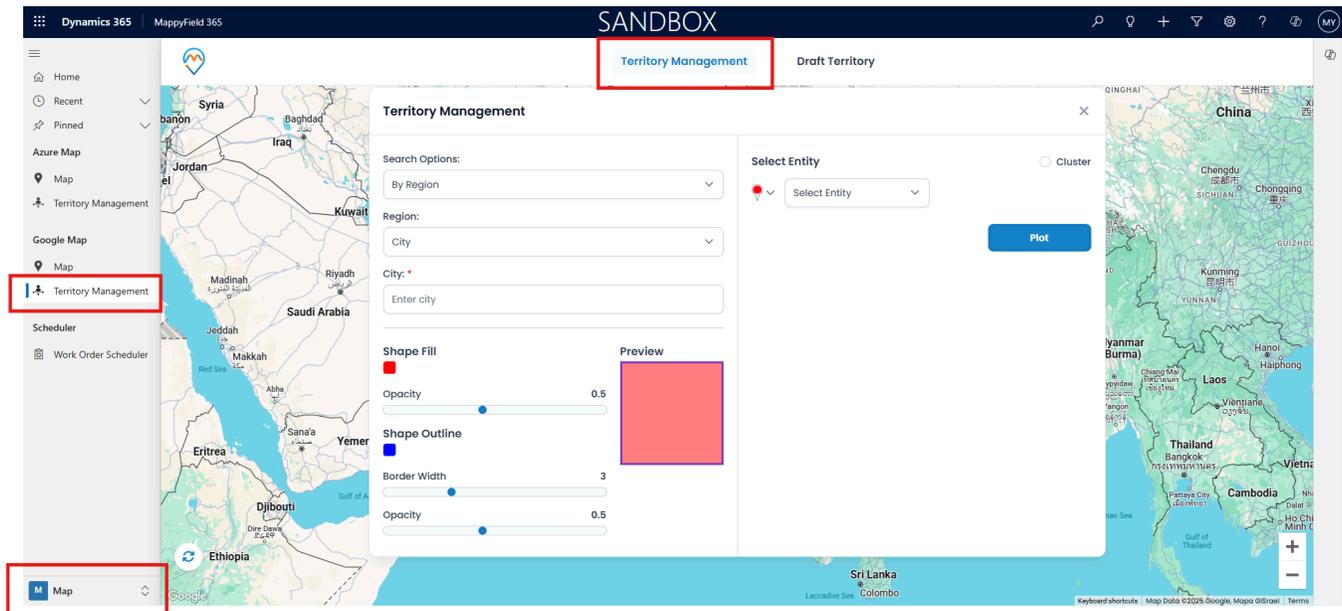
Day Week Month

Tuesday	
6am	
7am	
8am	
9am	
10am	
11am	
12pm	
1pm	
2pm	
3pm	
4pm	
5pm	05:00 PM - Quota 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.

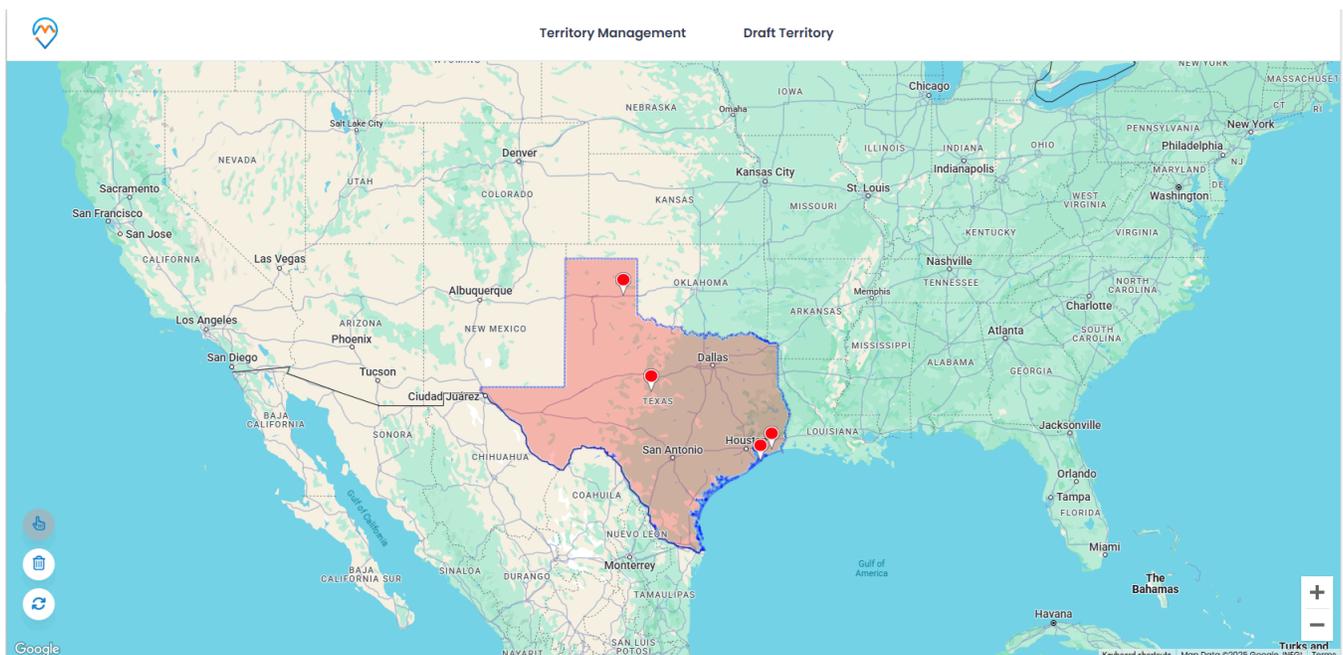
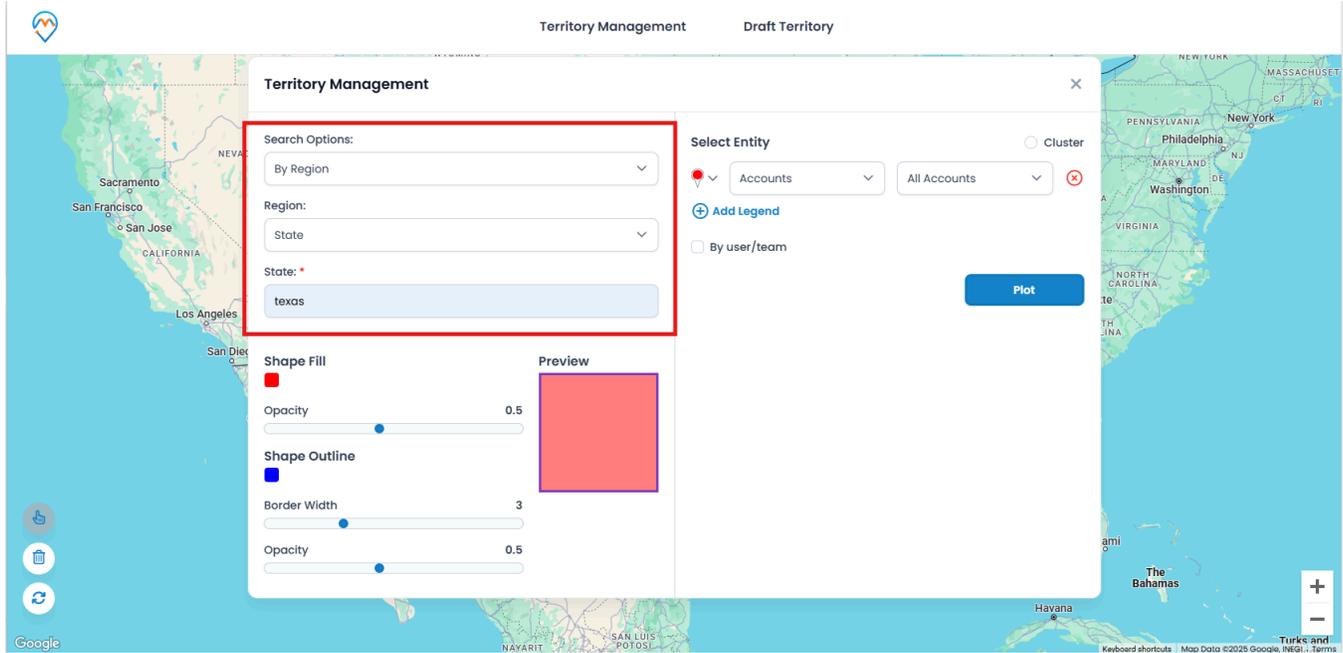
Click on the Territory Management section in the navigation panel and click on the Territory Management section present on the top of the page to create the territories.



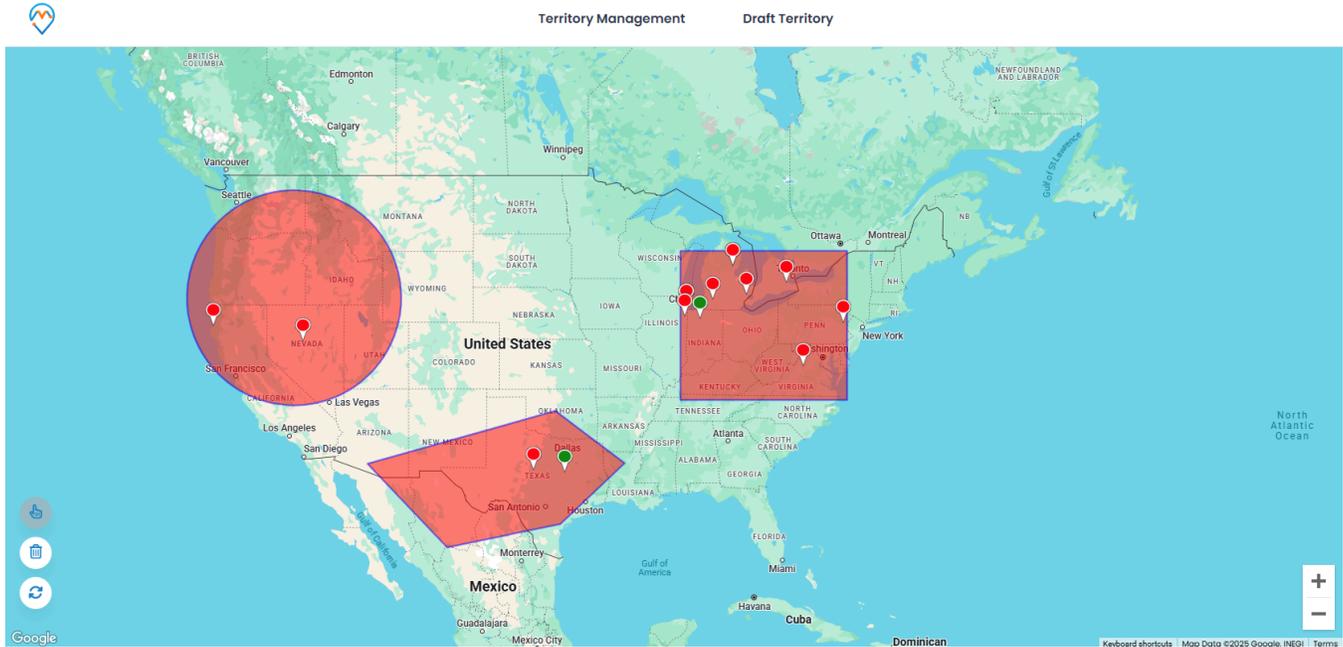
There are various options to create the territories and those are :

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.



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.

Territory Management ✕

Search Options:

By Territory ▼

Territory:

3 selected ▼

✕

- Colorado ✓
- Illinois ✓
- Missisipi ✓
- te google

Border Width 3

Opacity 0.5

Select Entity Cluster

● Accounts ▼ All Accounts ▼ ✕

● Contacts ▼ All Contacts ▼ ✕

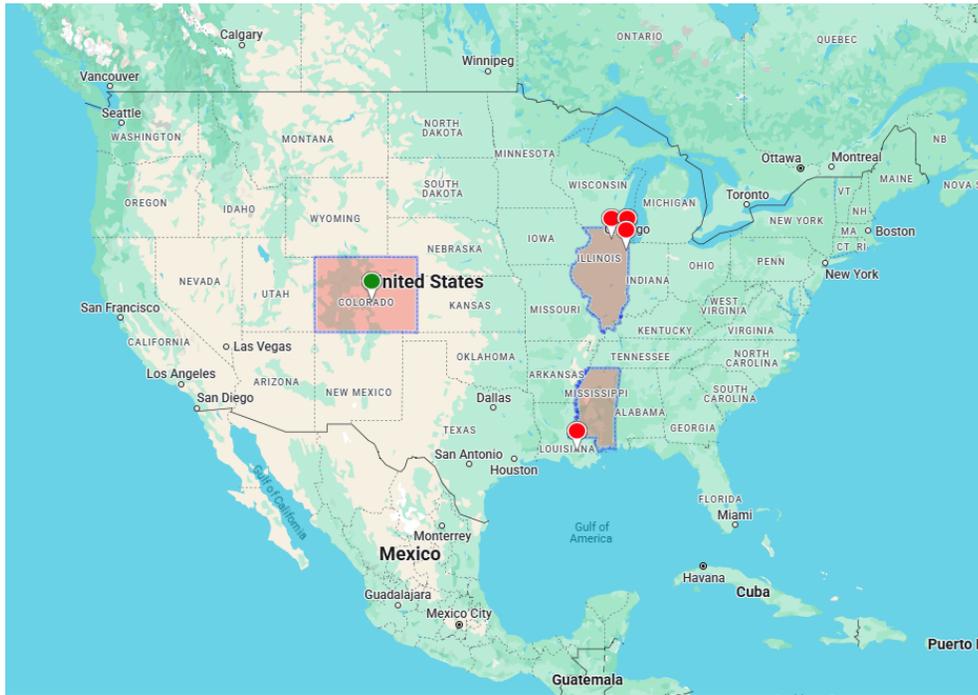
+ Add Legend

By user/team

Plot

Preview

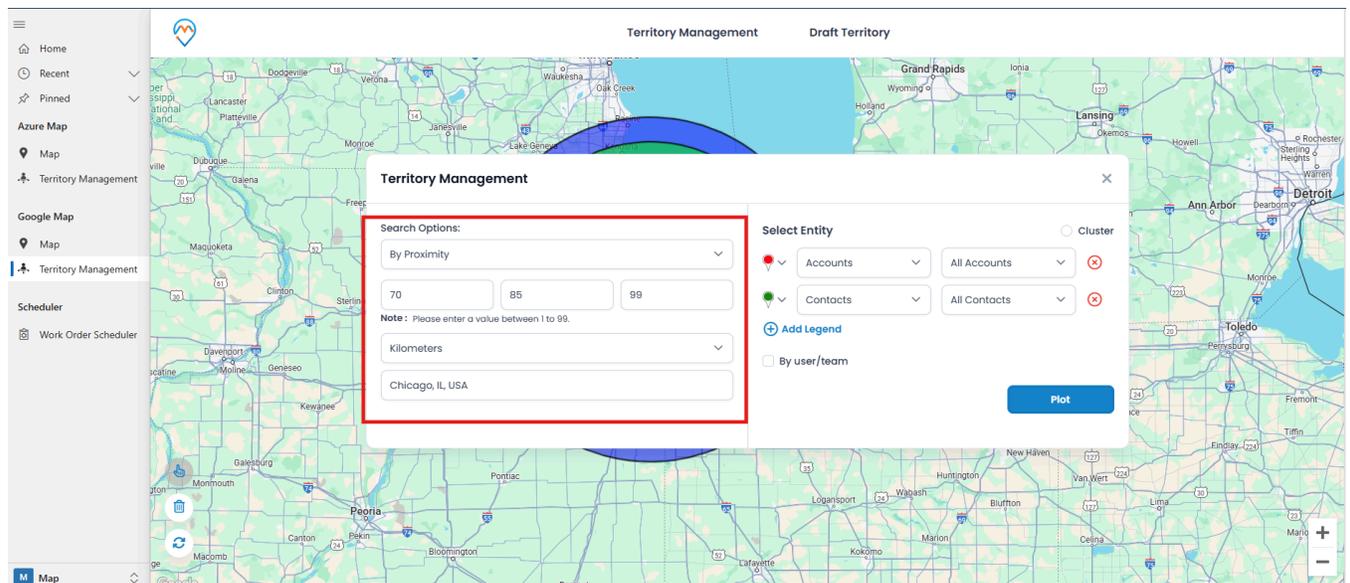




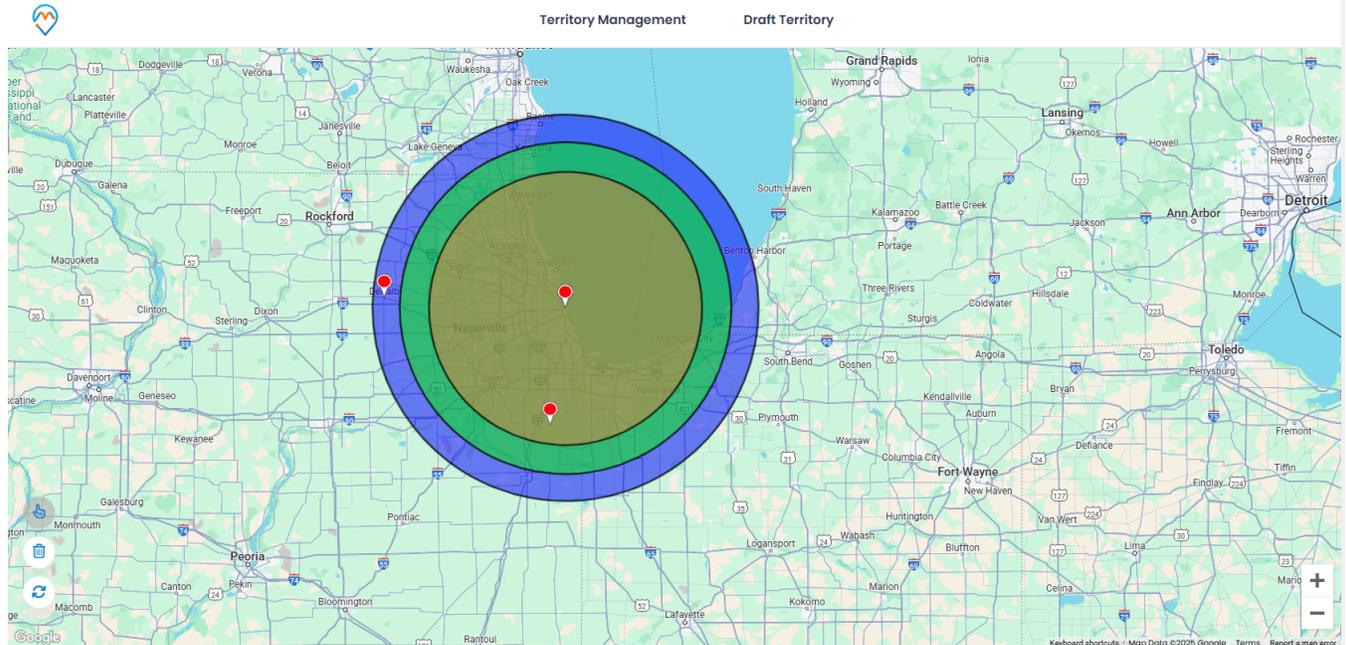
By Proximity - In this section, there are two further options : Distance and Time.

- **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

Search Options:

By File

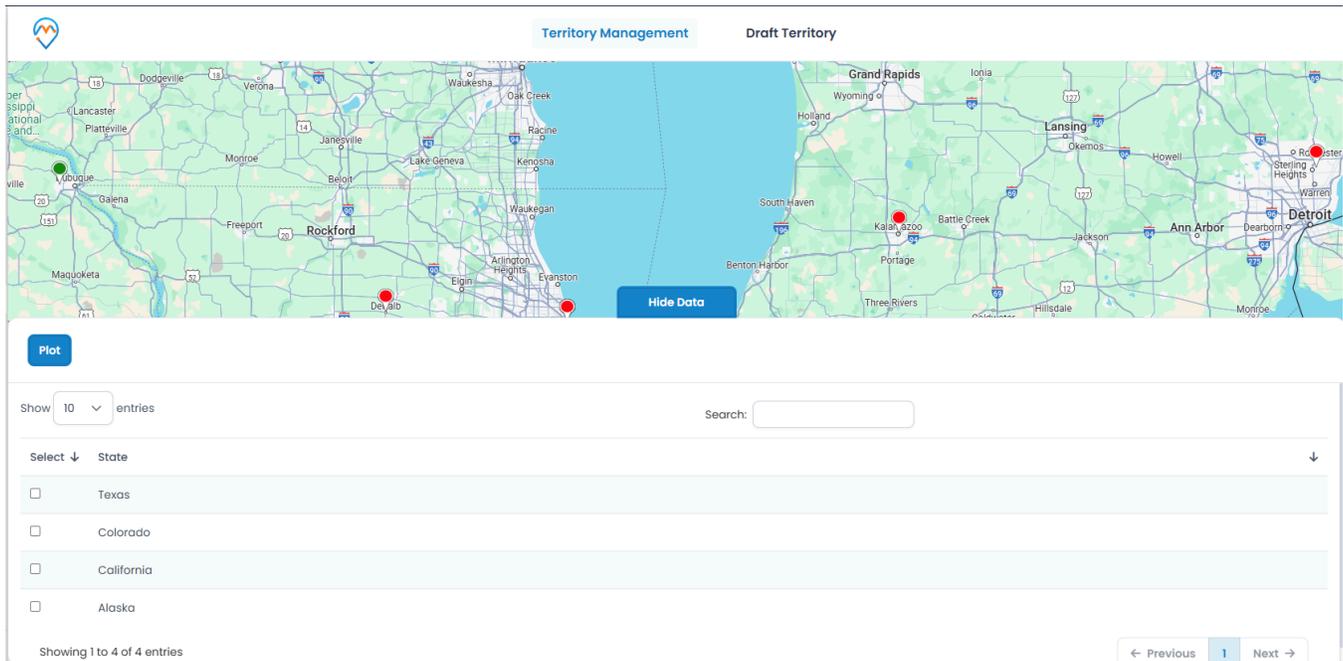
Select File: ?

Sample (5).csv

Upload

[Sample CSV File](#)

According to the data grid will get appeared



The screenshot displays the 'Territory Management' interface. At the top, there are two tabs: 'Territory Management' (active) and 'Draft Territory'. Below the tabs is a map of the United States with several red location markers. A 'Hide Data' button is visible on the map. Below the map is a 'Plot' button. Underneath, there is a data grid with the following elements:

- Show: 10 entries
- Search:
- Table with columns: Select, State
- Table rows:
 - Texas
 - Colorado
 - California
 - Alaska
- Showing 1 to 4 of 4 entries
- Navigation: ← Previous | 1 | Next →

Here, select the required region and click on plot.

Territory Management Draft Territory

Hide Data

Plot

Show 10 entries Search:

Select	State
<input checked="" type="checkbox"/>	Texas
<input checked="" type="checkbox"/>	Colorado
<input type="checkbox"/>	California
<input type="checkbox"/>	Alaska

Showing 1 to 4 of 4 entries 2 rows selected

← Previous 1 Next →

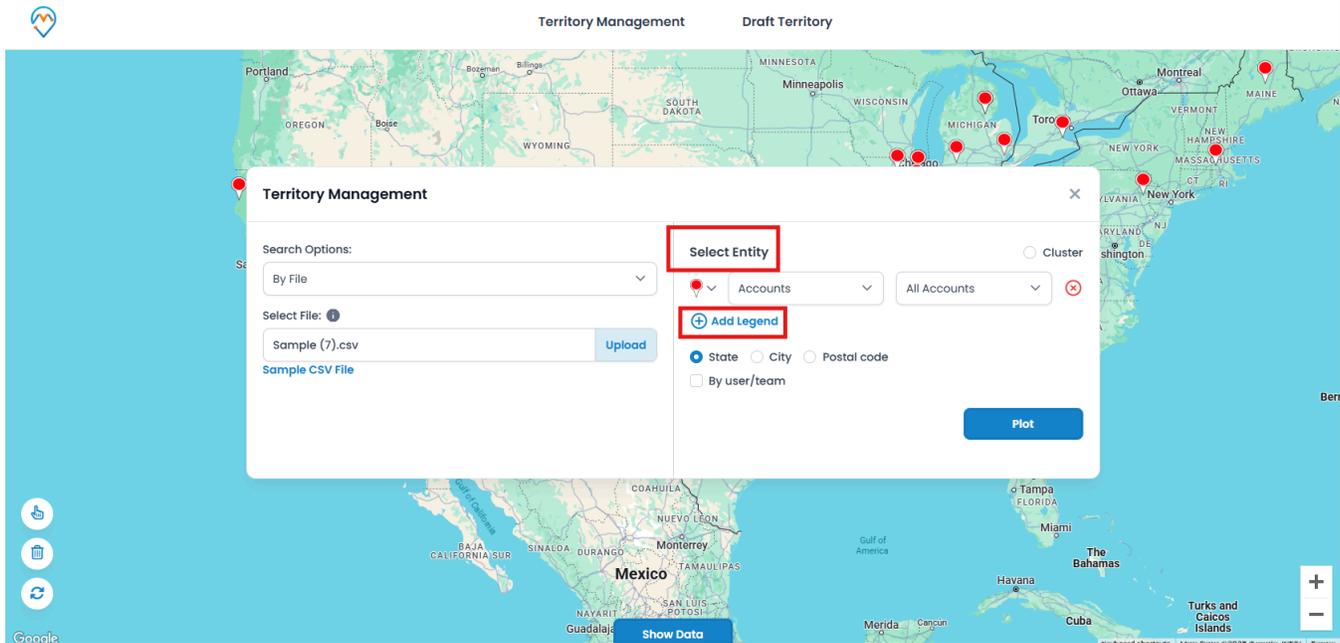
The territory will be plotted according to the regions selected from the grid.

Territory Management Draft Territory

Show Data

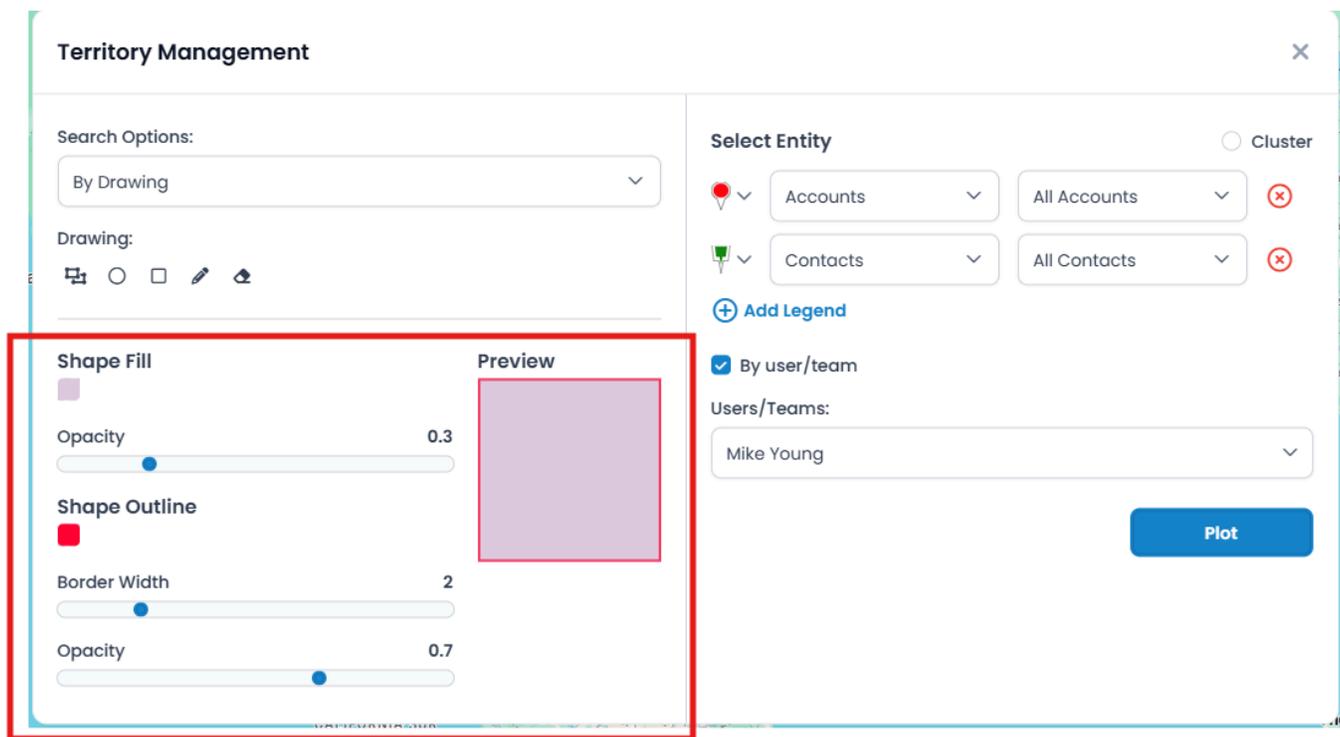
To the right, there are various entities mentioned from which the user has to select one. After selecting the Entity select the Entity view.

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



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.

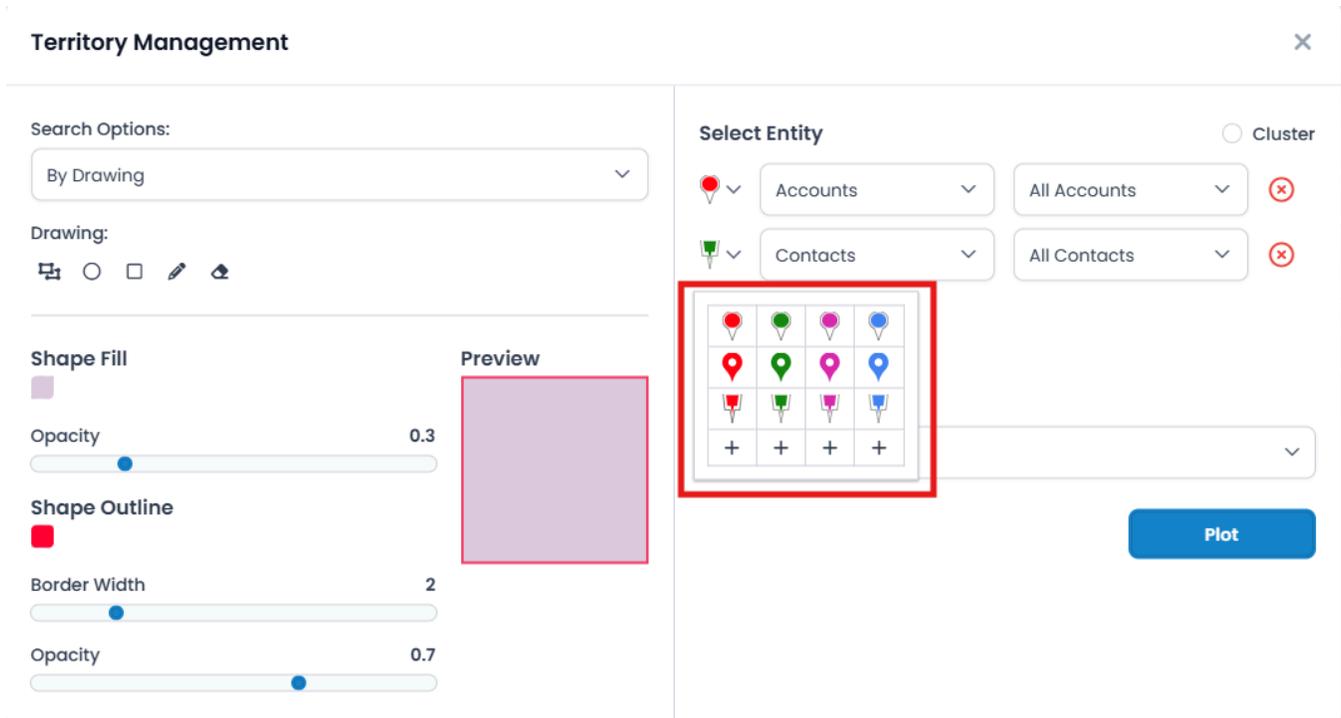
Also the color, width and opacity of the outline of the territory can be selected through Shape Outline, Border Width and Opacity respectively. In the Preview section the color that has been selected is displayed.



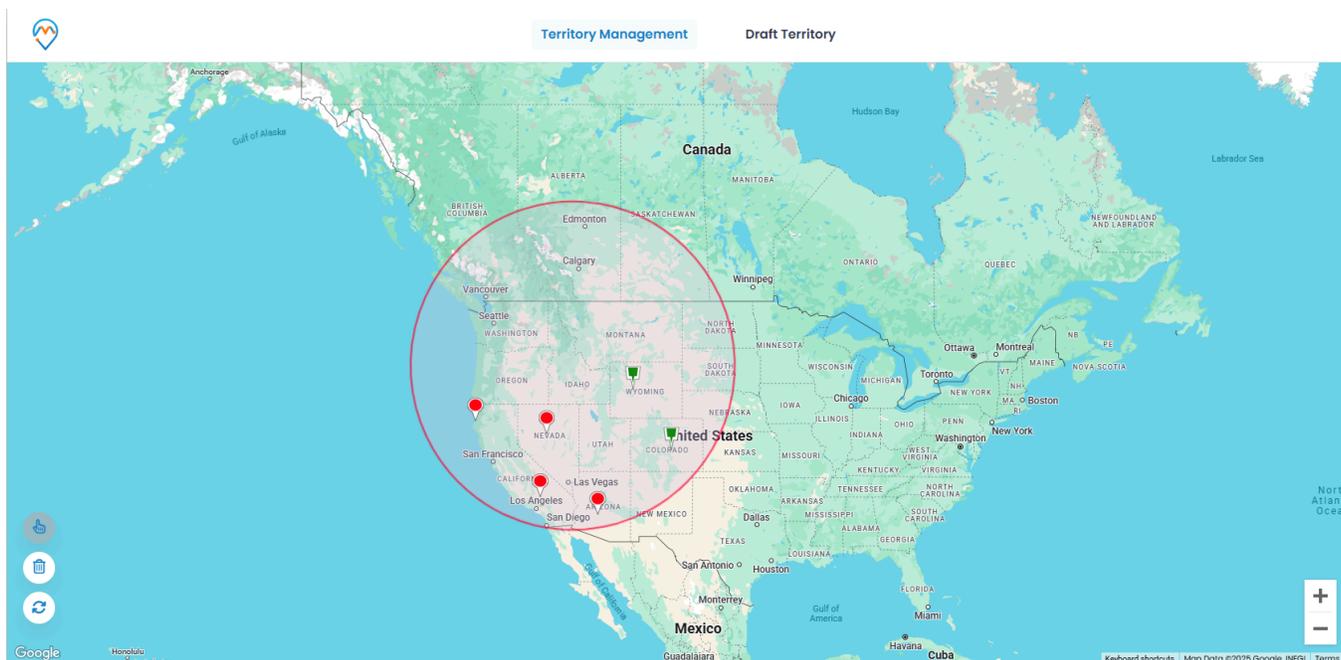
In the above portion, steps to create and plot the territories on the map have been mentioned.

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

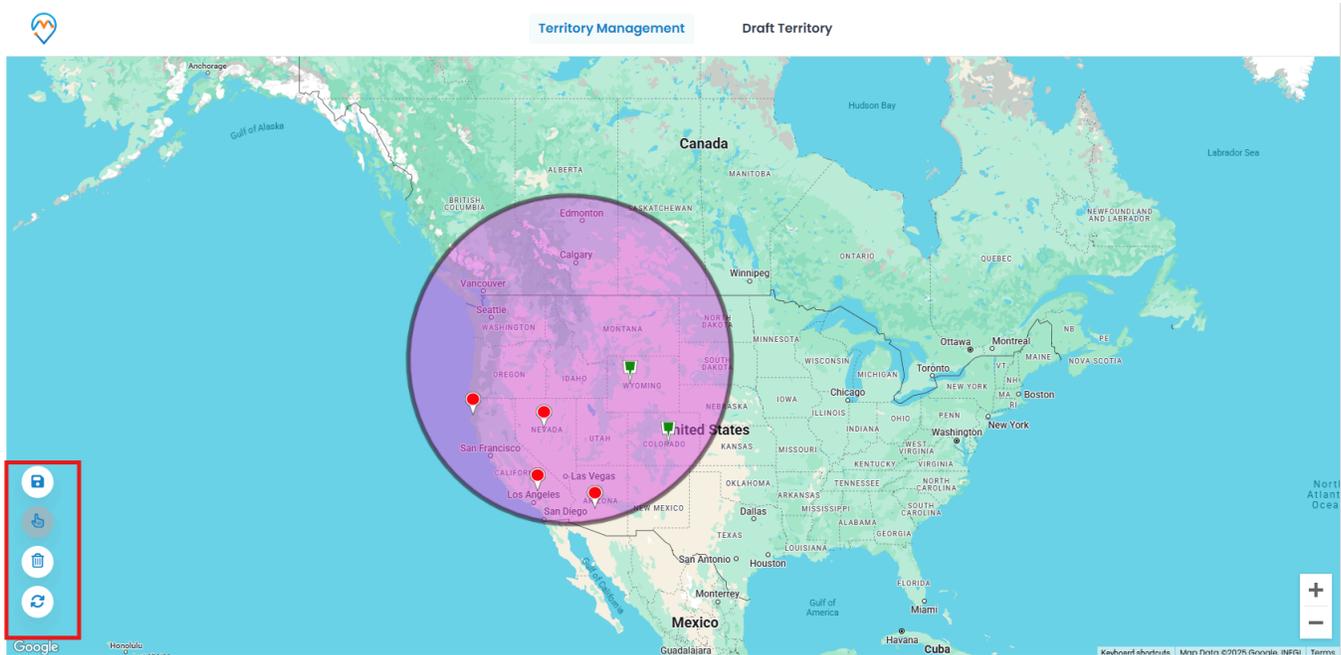
There are four colors you can choose from : Red, Green, Pink and Blue. Three different shapes are also available. You can also add other pins by clicking on the add button; it is mentioned that only SVG files should be uploaded. A sample file is also given.



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

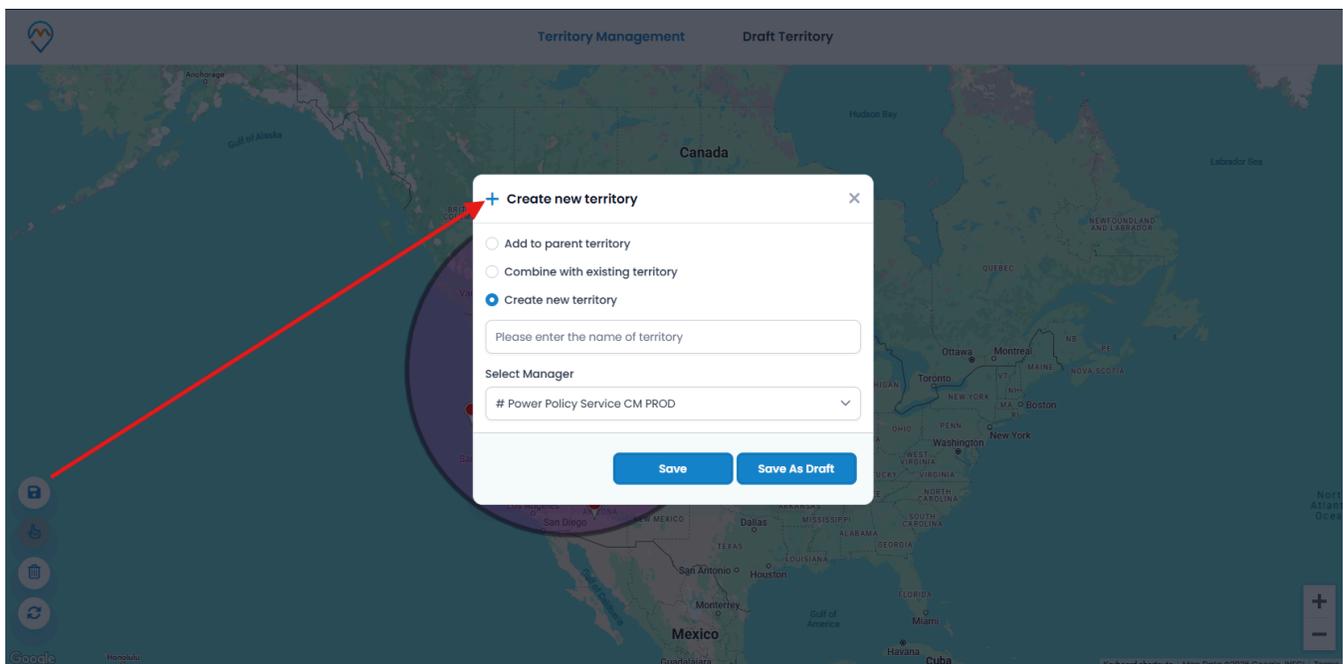


When a territory is plotted three icons are displayed below on the left side.  - This icon is to select the particular territory.  - To delete any selected territory this button should be clicked. The third icon is used to refresh the entire page.



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:



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

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 territory ×

Add to parent territory

Combine with existing territory

Create new territory

Texas region

Select Manager

Steve Adams ▼

Save **Save As Draft**

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

+ Create new territory ×

Add to parent territory

Combine with existing territory

Create new territory

Texas region

Select Manager

Steve Adams ▼

Save **Save As Draft**

Draft Territories

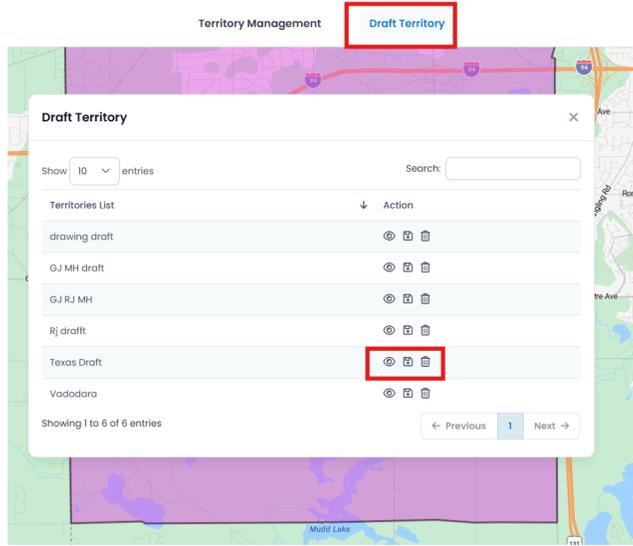
While creating a territory you are provided with two options either to directly save or to save as a draft. Those territories that are saved as drafts are listed in this section. The list contains two columns :

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.

Territory Management **Draft Territory**



Draft Territory X

Show 10 entries Search:

Territories List	Action
drawing draft	 
GJ MH draft	 
GJ RJ MH	 
Rj draft	 
Texas Draft	 
Vadodara	 

Showing 1 to 6 of 6 entries

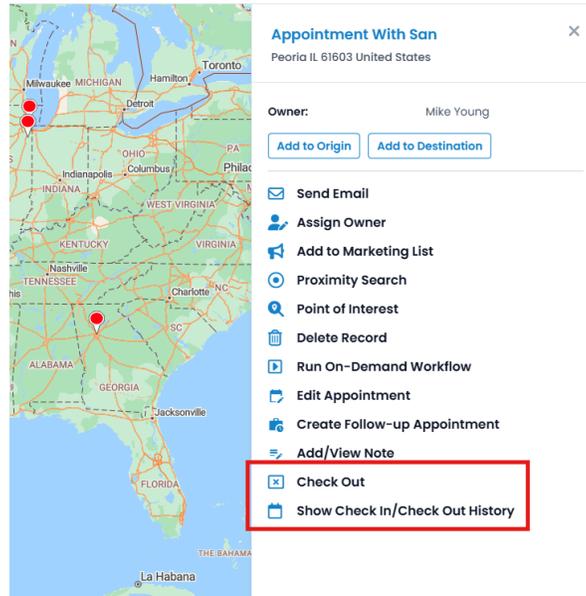
← Previous 1 Next →

Check-Ins/Check-Outs

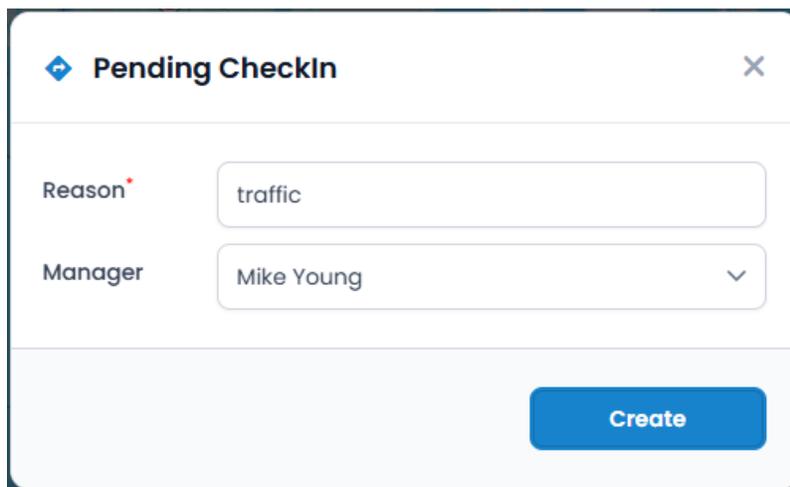
- You can use **Check-in** and **Check-out** features in all **activity** entities for Azure as well as Google map.
- Check-In feature enables admin/user to keep track of exact time spent behind an activity.
- With the help **of the check** in/check out button, you can tag geo-coordinates of the location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



- 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

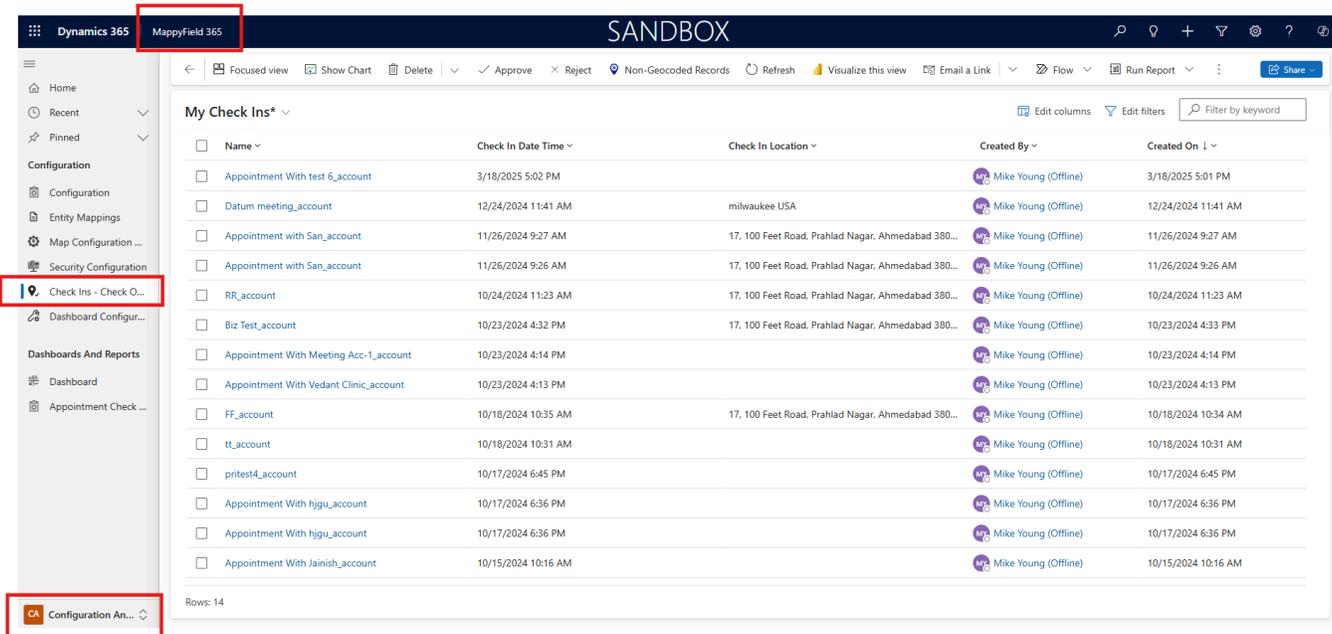
Reason*

Manager

[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.

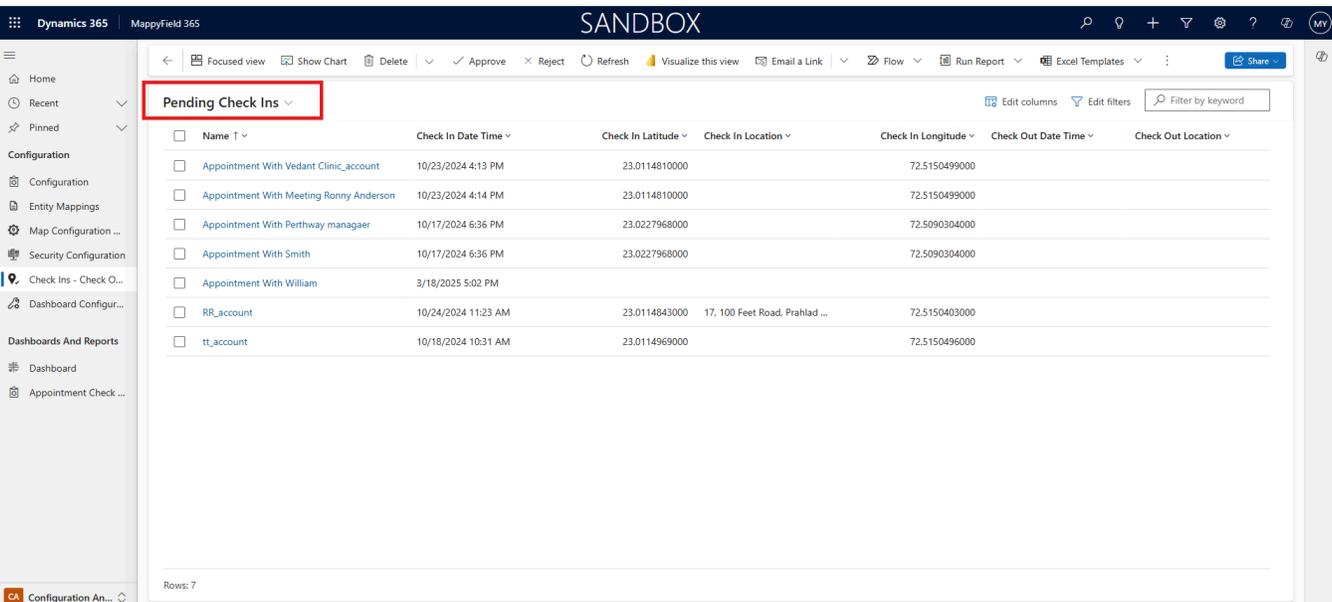


My Check Ins*

Name	Check In Date Time	Check In Location	Created By	Created On
Appointment With test 6_account	3/18/2025 5:02 PM		Mike Young (Offline)	3/18/2025 5:01 PM
Datum meeting_account	12/24/2024 11:41 AM	milwaukee USA	Mike Young (Offline)	12/24/2024 11:41 AM
Appointment with San_account	11/26/2024 9:27 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	11/26/2024 9:27 AM
Appointment with San_account	11/26/2024 9:26 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	11/26/2024 9:26 AM
RR_account	10/24/2024 11:23 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/24/2024 11:23 AM
Biz Test_account	10/23/2024 4:32 PM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/23/2024 4:33 PM
Appointment With Meeting Acc-1_account	10/23/2024 4:14 PM		Mike Young (Offline)	10/23/2024 4:14 PM
Appointment With Vedant Clinic_account	10/23/2024 4:13 PM		Mike Young (Offline)	10/23/2024 4:13 PM
FF_account	10/18/2024 10:35 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/18/2024 10:34 AM
tt_account	10/18/2024 10:31 AM		Mike Young (Offline)	10/18/2024 10:31 AM
pritest4_account	10/17/2024 6:45 PM		Mike Young (Offline)	10/17/2024 6:45 PM
Appointment With hjgu_account	10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
Appointment With hjgu_account	10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
Appointment With Jainish_account	10/15/2024 10:16 AM		Mike Young (Offline)	10/15/2024 10:16 AM

Rows: 14

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



Pending Check Ins

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	23.0114810000		72.5150499000		
Appointment With Meeting Ronny Anderson	10/23/2024 4:14 PM	23.0114810000		72.5150499000		
Appointment With Perthway managaer	10/17/2024 6:36 PM	23.0227968000		72.5090304000		
Appointment With Smith	10/17/2024 6:36 PM	23.0227968000		72.5090304000		
Appointment With William	3/18/2025 5:02 PM					
RR_account	10/24/2024 11:23 AM	23.0114843000	17, 100 Feet Road, Prahlad ...	72.5150403000		
tt_account	10/18/2024 10:31 AM	23.0114969000		72.5150496000		

Rows: 7

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.

Appointment With William - Saved
Check Ins

General Notes Related

Check In Time: 3/18/2025 5:02 PM

Check In Location: [Redacted]

Check Out Time: [Redacted]

Check Out Location: [Redacted]

Check In User: Mike Young (Offline)

Total Time Spent: 0 Min

Check In Latitude: ---

Check In Longitude: --Select--

Manager: Pending Approve Reject

Reason For Late Check-in: Pending

Check In Status: Pending

Approved Check In: No

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.

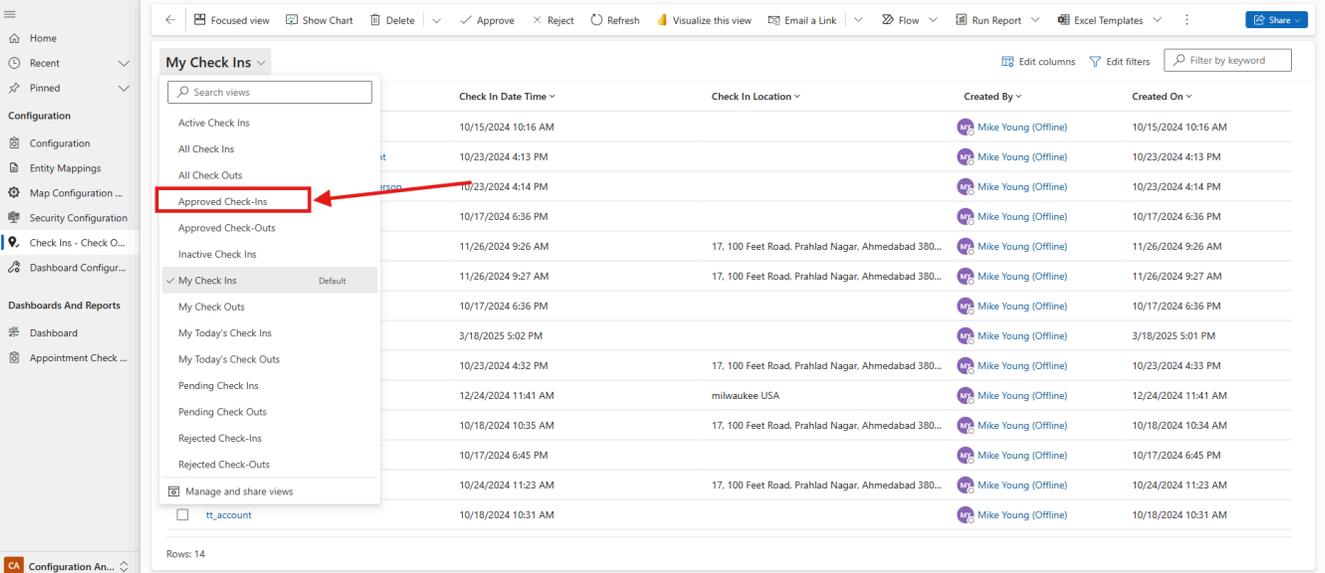
Approved

Pending Check Ins

<input type="checkbox"/>	Name	Check In Date Time	Check In Latitude	Check In Location	Check In Longitude	Check Out Date Time	Check Out Location
<input checked="" type="checkbox"/>	Appointment With Vedant Clinic_account	10/23/2024 4:13 PM	23.0114810000		72.5150499000		
<input checked="" type="checkbox"/>	Appointment With Meeting_Bonny Anderson	10/23/2024 4:14 PM	23.0114810000		72.5150499000		
<input type="checkbox"/>	Appointment With Perthway managaer	10/17/2024 6:36 PM	23.0227968000		72.5090304000		
<input type="checkbox"/>	Appointment With Smith	10/17/2024 6:36 PM	23.0227968000		72.5090304000		
<input type="checkbox"/>	Appointment With William	3/18/2025 5:02 PM					
<input type="checkbox"/>	RR_account	10/24/2024 11:23 AM	23.0114843000	17, 100 Feet Road, Prahlad ...	72.5150403000		
<input type="checkbox"/>	tt_account	10/18/2024 10:31 AM	23.0114969000		72.5150496000		

Approved Check Ins

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

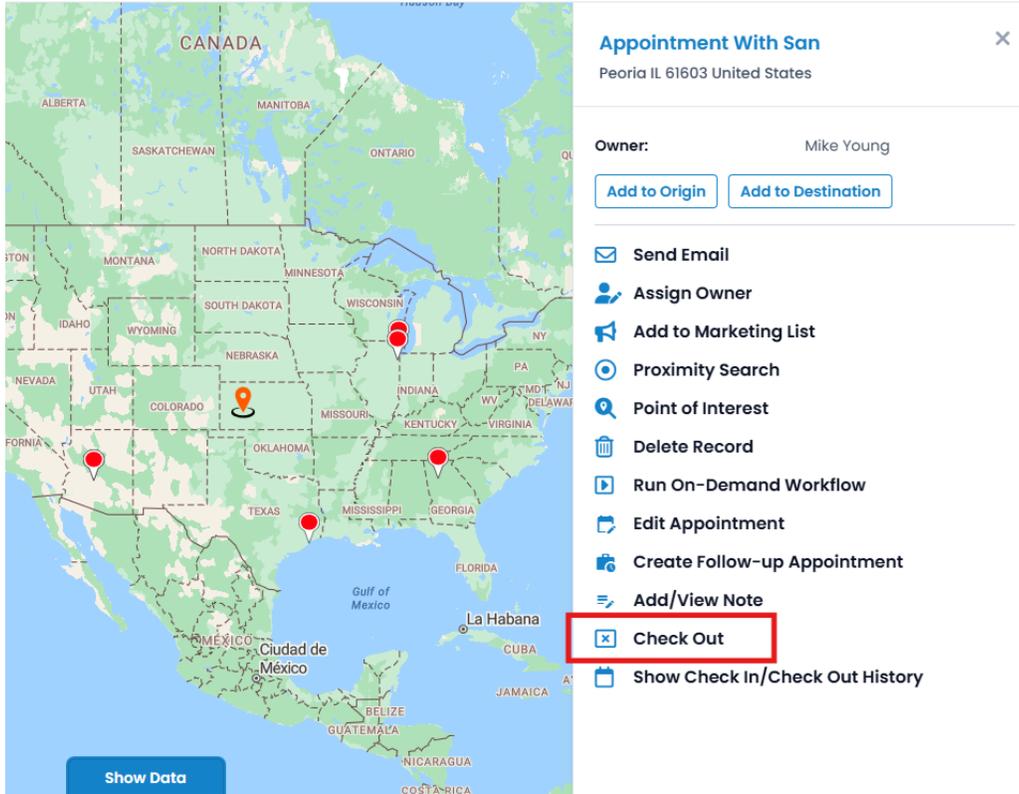


The screenshot shows the 'My Check Ins' dashboard with a table of check-in records. A dropdown menu is open, highlighting 'Approved Check-Ins' with a red box and arrow. The table contains 14 rows of data.

Check In Date Time	Check In Location	Created By	Created On
10/15/2024 10:16 AM		Mike Young (Offline)	10/15/2024 10:16 AM
10/23/2024 4:13 PM		Mike Young (Offline)	10/23/2024 4:13 PM
10/23/2024 4:14 PM		Mike Young (Offline)	10/23/2024 4:14 PM
10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
11/26/2024 9:26 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	11/26/2024 9:26 AM
11/26/2024 9:27 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	11/26/2024 9:27 AM
10/17/2024 6:36 PM		Mike Young (Offline)	10/17/2024 6:36 PM
3/18/2025 5:02 PM		Mike Young (Offline)	3/18/2025 5:01 PM
10/23/2024 4:32 PM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/23/2024 4:33 PM
12/24/2024 11:41 AM	milwaukee USA	Mike Young (Offline)	12/24/2024 11:41 AM
10/18/2024 10:35 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/18/2024 10:34 AM
10/17/2024 6:45 PM		Mike Young (Offline)	10/17/2024 6:45 PM
10/24/2024 11:23 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380...	Mike Young (Offline)	10/24/2024 11:23 AM
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.



Appointment With San ×
Peoria IL 61603 United States

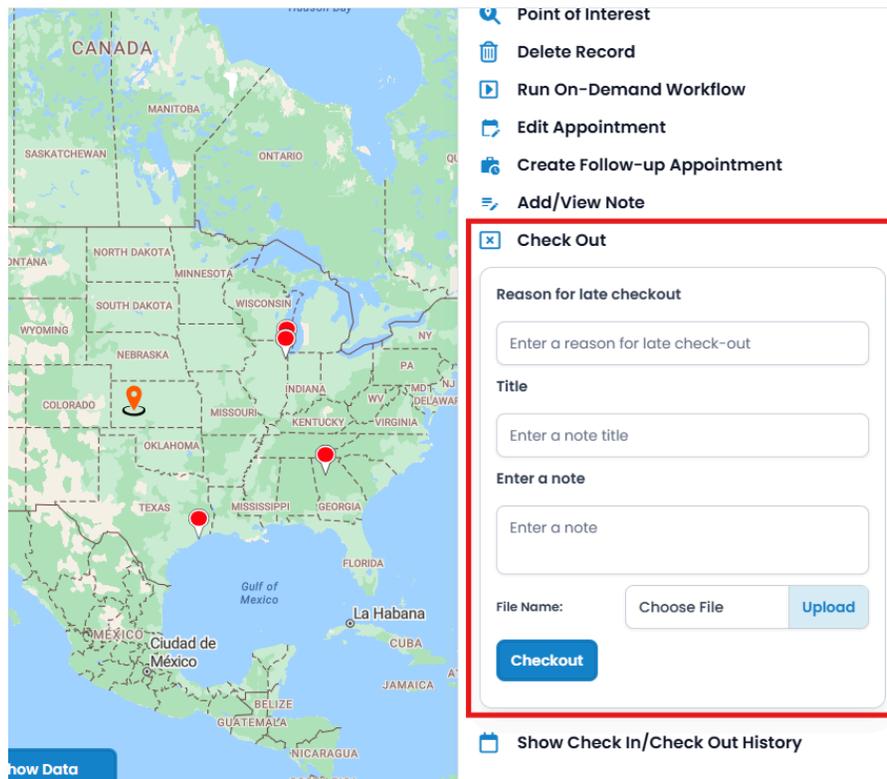
Owner: Mike Young

[Add to Origin](#) [Add to Destination](#)

- Send Email
- Assign Owner
- Add to Marketing List
- Proximity Search
- Point of Interest
- Delete Record
- Run On-Demand Workflow
- Edit Appointment
- Create Follow-up Appointment
- Add/View Note
- Check Out**
- Show Check In/Check Out History

[Show Data](#)

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



- Point of Interest
- Delete Record
- Run On-Demand Workflow
- Edit Appointment
- Create Follow-up Appointment
- Add/View Note
- Check Out**
- Show Check In/Check Out History

Reason for late checkout

Title

Enter a note

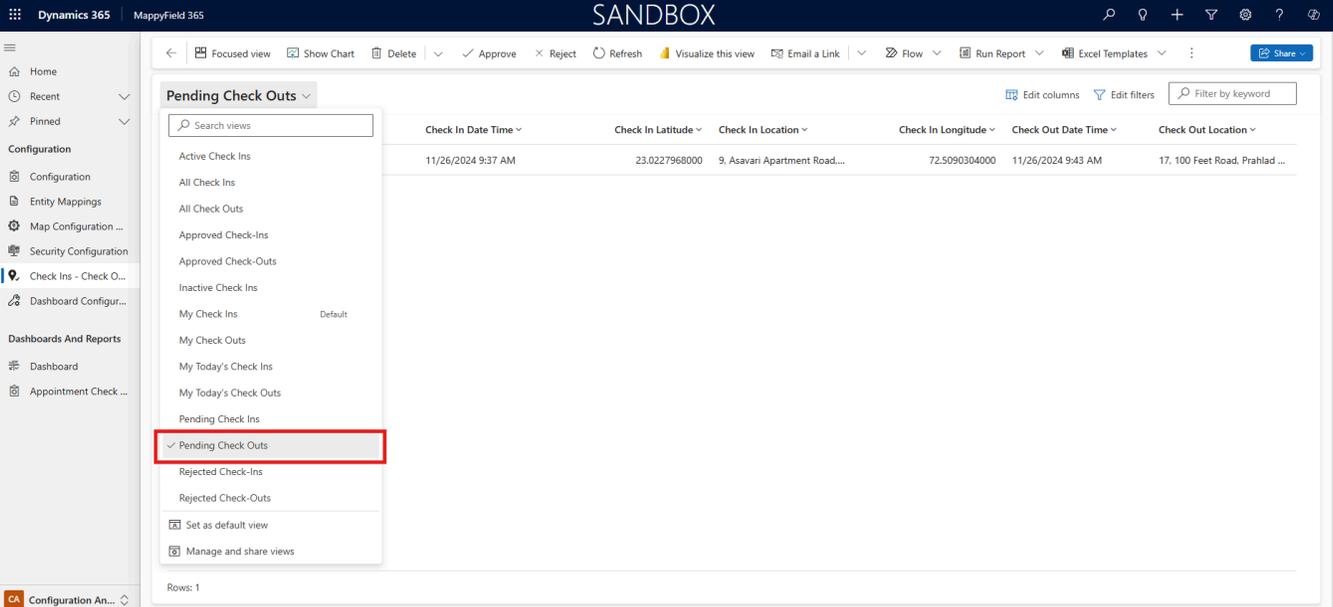
File Name:

- 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.

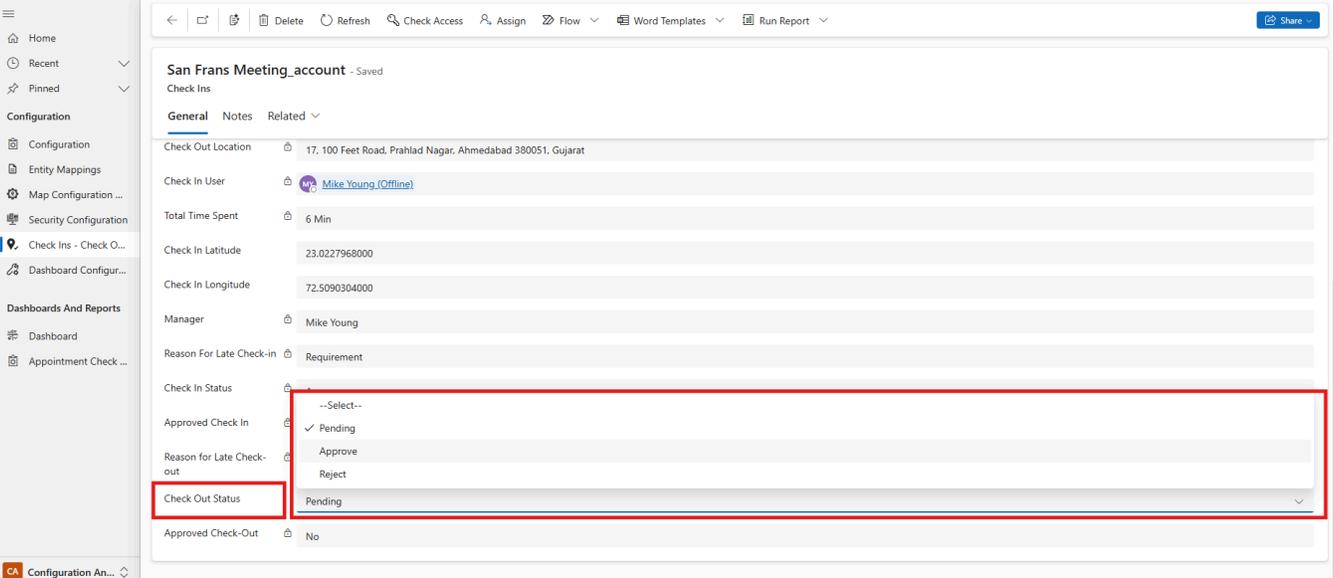


The screenshot shows the Dynamics 365 interface for 'MappyField 365' in 'SANDBOX' mode. The left sidebar shows the navigation menu with 'Check Ins - Check Out...' selected. The main area displays a table titled 'Pending Check Outs'. The table has the following data row:

Check In Date Time	Check In Latitude	Check In Location	Check In Longitude	Check Out Date Time	Check Out Location
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 ...

A dropdown menu is open over the table, showing various view options. The 'Pending Check Outs' option is selected and highlighted with a red box.

- 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.



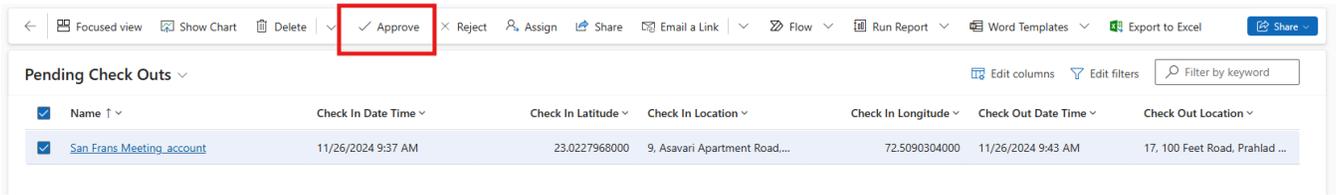
The screenshot shows the Dynamics 365 interface for 'San Frans Meeting_account' - Saved. The 'Check Ins' section is expanded to show details for a specific check-in. The 'Check Out Status' field is highlighted with a red box, and the dropdown menu is open, showing 'Pending' selected. Other fields include:

- Check Out Location: 17, 100 Feet Road, Prahlad Nagar, Ahmedabad 380051, Gujarat
- Check In User: Mike Young (Offline)
- Total Time Spent: 6 Min
- Check In Latitude: 23.0227968000
- Check In Longitude: 72.5090304000
- Manager: Mike Young
- Reason For Late Check-in: Requirement
- Check In Status: --Select--
- Approved Check In: Pending
- Reason for Late Check-out: Approve, Reject
- Check Out Status: Pending
- Approved Check-Out: No

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

Bulk Edit

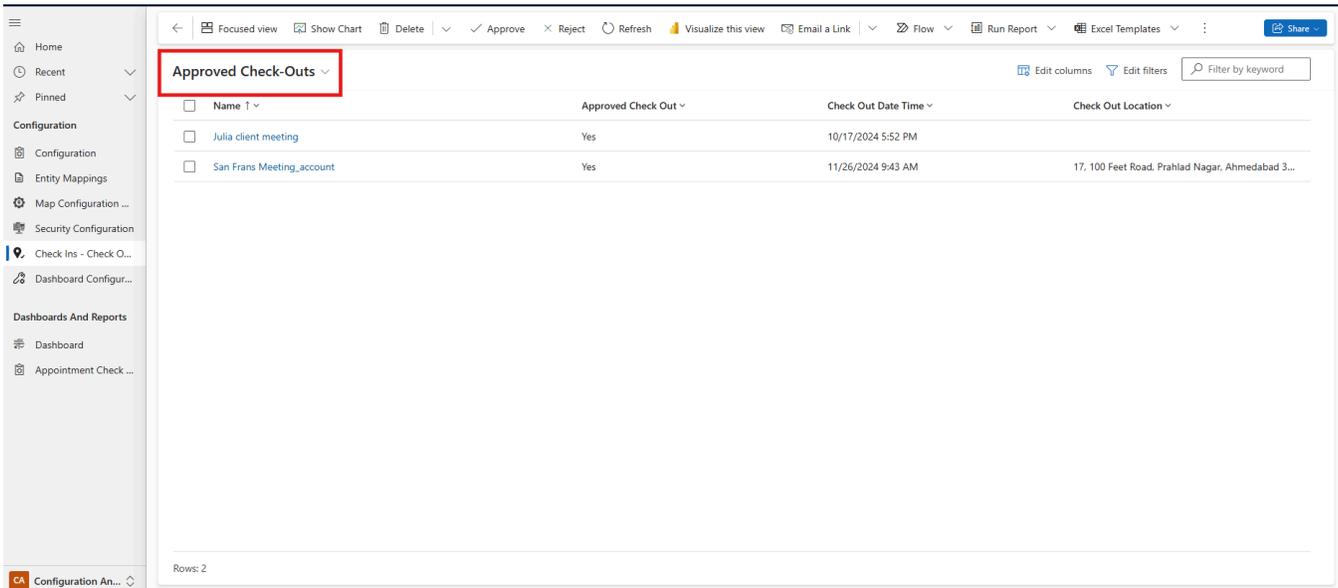
- Select the records and click on the **Approve** button to approve the check-outs.



Name	Check In Date Time	Check In Latitude	Check In Location	Check In Longitude	Check Out Date Time	Check Out Location
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 ...

Approved Check Outs

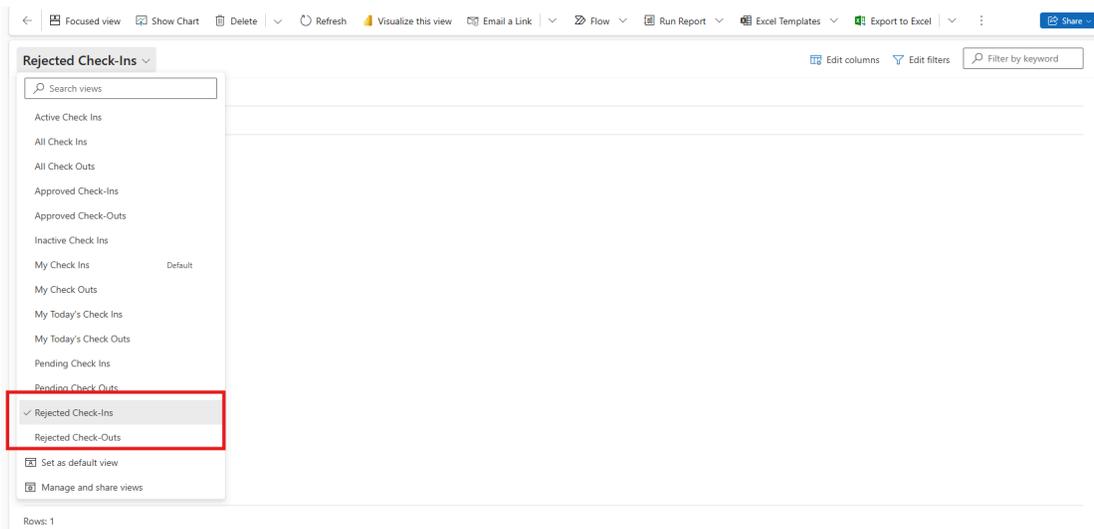
- Once the Check-outs are approved it will be displayed in the **Approved Check-outs** page.



Name	Approved Check Out	Check Out Date Time	Check Out Location
Julia client meeting	Yes	10/17/2024 5:52 PM	
San Frans Meeting_account	Yes	11/26/2024 9:43 AM	17, 100 Feet Road, Prahlad Nagar, Ahmedabad 3...

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.

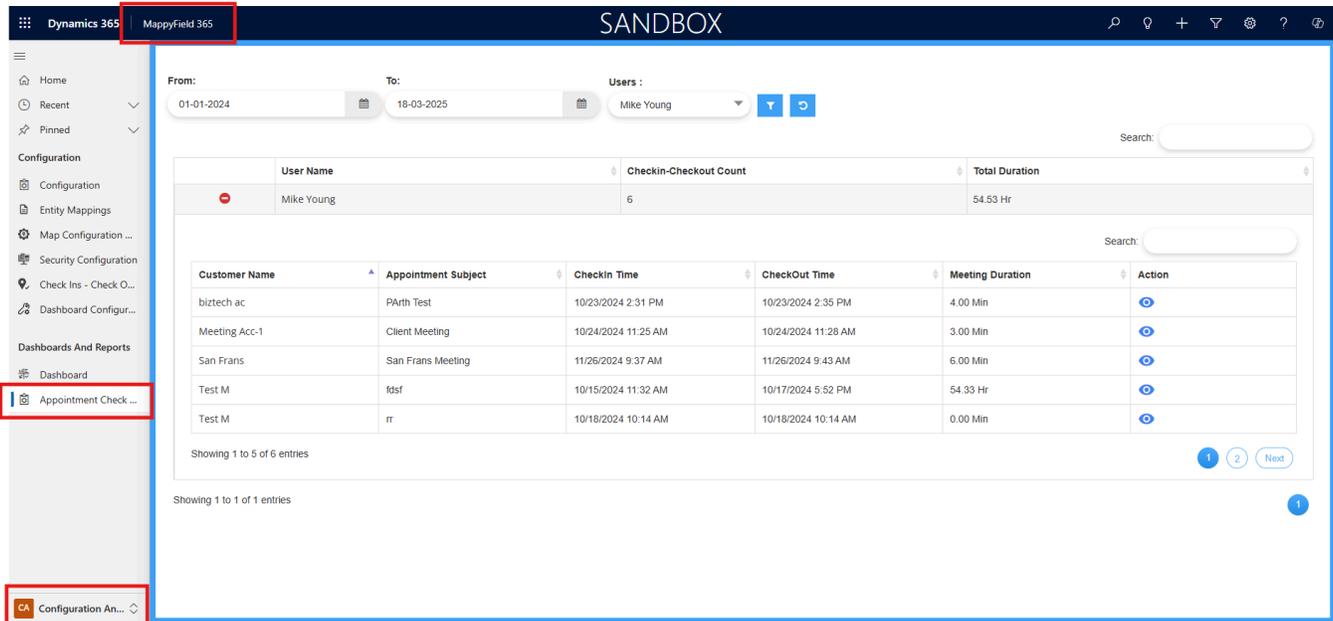


Name	Rejected Check In	Rejected Check Out

- 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.



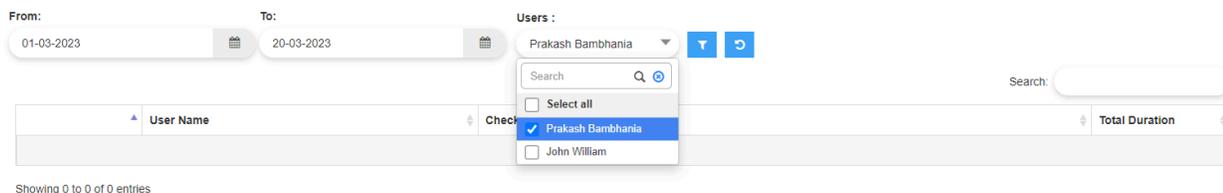
From: 01-01-2024 **To:** 18-03-2025 **Users:** Mike Young

User Name	Checkin-Checkout Count	Total Duration
Mike Young	6	54.53 Hr

Customer Name	Appointment Subject	Checkin Time	CheckOut Time	Meeting Duration	Action
biztech ac	PArth Test	10/23/2024 2:31 PM	10/23/2024 2:35 PM	4.00 Min	View
Meeting Acc-1	Client Meeting	10/24/2024 11:25 AM	10/24/2024 11:28 AM	3.00 Min	View
San Frans	San Frans Meeting	11/26/2024 9:37 AM	11/26/2024 9:43 AM	6.00 Min	View
Test M	fdsf	10/15/2024 11:32 AM	10/17/2024 5:52 PM	54.33 Hr	View
Test M	rr	10/18/2024 10:14 AM	10/18/2024 10:14 AM	0.00 Min	View

Showing 1 to 5 of 6 entries

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.

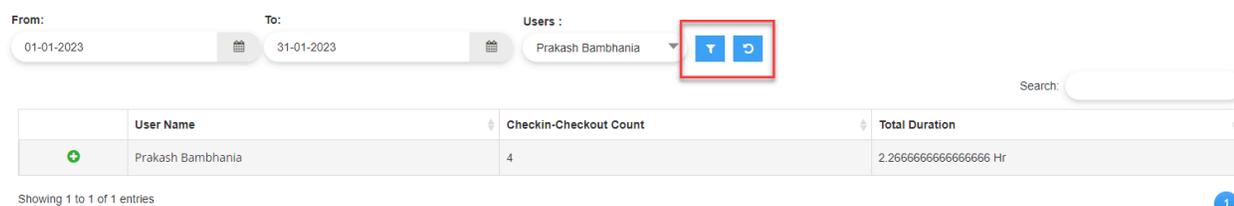


From: 01-03-2023 **To:** 20-03-2023 **Users:** Prakash Bambhania

- Select all
- Prakash Bambhania
- John William

Showing 0 to 0 of 0 entries

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 **To:** 31-01-2023 **Users:** Prakash Bambhania

User Name	Checkin-Checkout Count	Total Duration
Prakash Bambhania	4	2.2666666666666666 Hr

Showing 1 to 1 of 1 entries

A list of the agents including their checkin-checkout count and total duration is displayed after clicking on the filter icon. By clicking on  which is present on the left side of the list you can view the activity details.

From:  **To:**

	User Name
	Prakash Bambhania

Showing 1 to 1 of 1 entries

The report displayed after clicking on , 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	Action
Adam	Adam's Meeting	1/30/2023 2:23 PM	1/30/2023 2:58 PM	35 Min	
Andrion	Quote Discussion	1/30/2023 2:24 PM	1/30/2023 2:59 PM	35 Min	
Naive	AppntImp	1/30/2023 2:23 PM	1/30/2023 2:59 PM	36 Min	
Titan	Titan's Meeting for discussion	1/30/2023 2:53 PM	1/30/2023 3:25 PM	32 Min	

Showing 1 to 4 of 4 entries 

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:

↕	Action
	
	
	
	

←  + Add Alert  Delete  Refresh  Check Access  Assign  Flow  Word Templates  Run Report  Share

Adam's Meeting_account - Saved

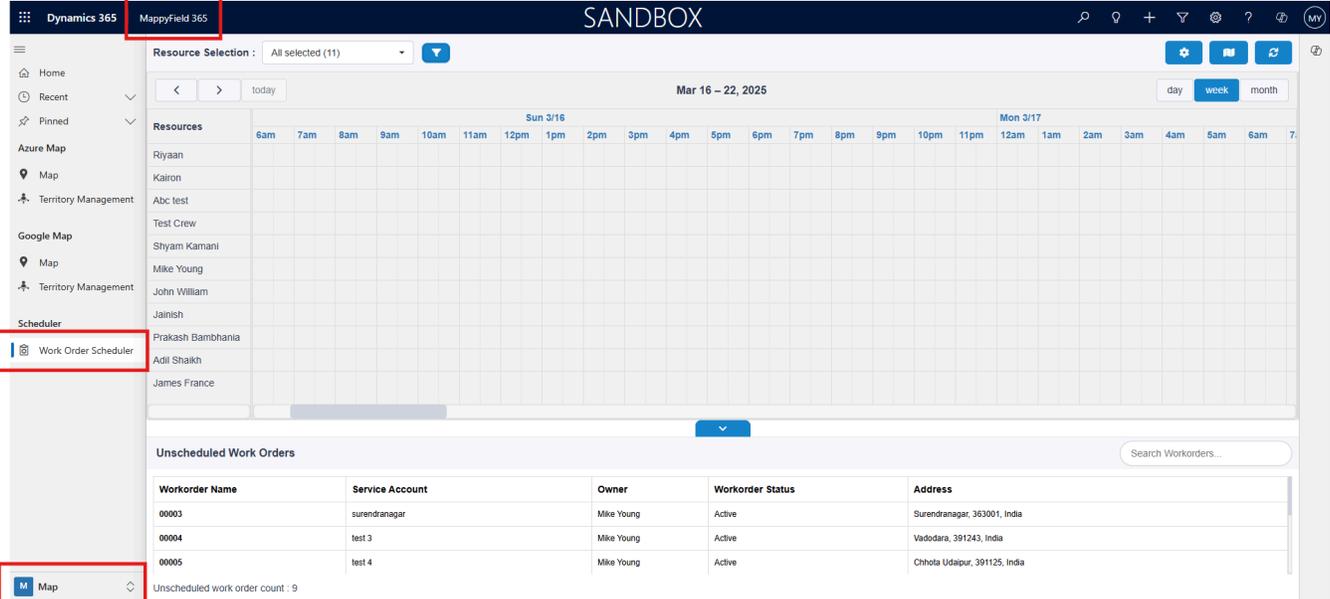
Check Ins

General Notes Related

 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
 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	72.5155000000
 Manager	Prakash Bambhania

Work order scheduler

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.



Resource Selection: All selected (11)

Resources: Riyaan, Kairon, Abc test, Test Crew, Shyam Kamani, Mike Young, John William, Jainish, Prakash Bamphania, Adil Shaikh, James France

Unscheduled Work Orders:

Workorder Name	Service Account	Owner	Workorder Status	Address
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara, 391243, India
00005	test 4	Mike Young	Active	Chhota Udaipur, 391125, India

Unscheduled work order count : 9

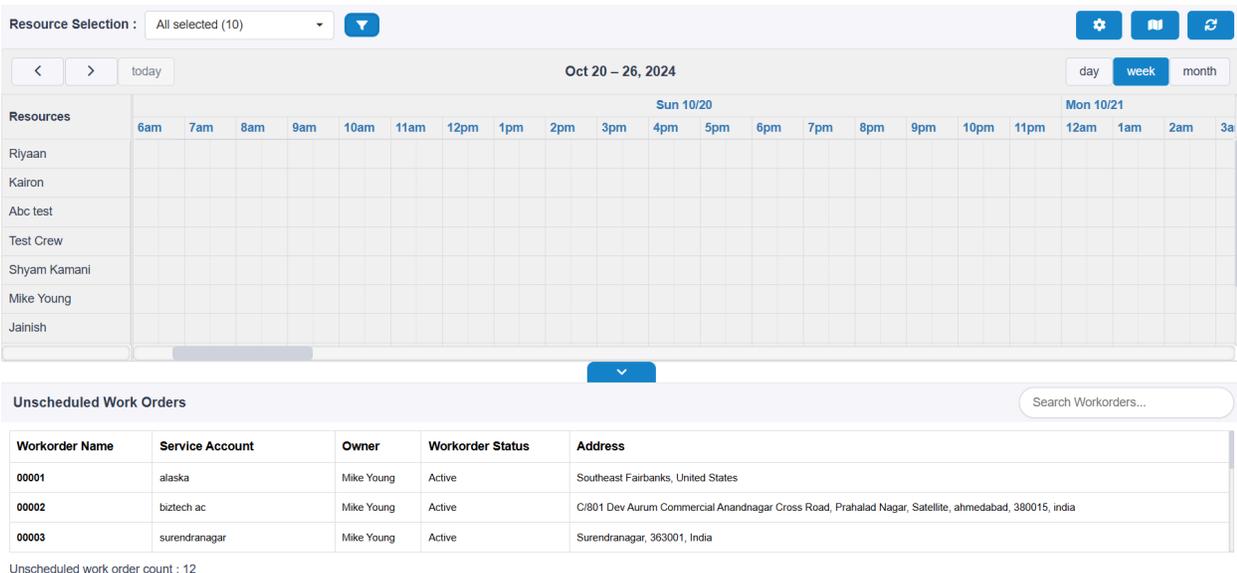
Note:

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

- Field Service License
- Mappyfield 365 Installation with an active license
- Mappyfield 365 Configuration with Azure Maps

Supported Devices

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



Resource Selection: All selected (10)

Resources: Riyaan, Kairon, Abc test, Test Crew, Shyam Kamani, Mike Young, Jainish

Unscheduled Work Orders:

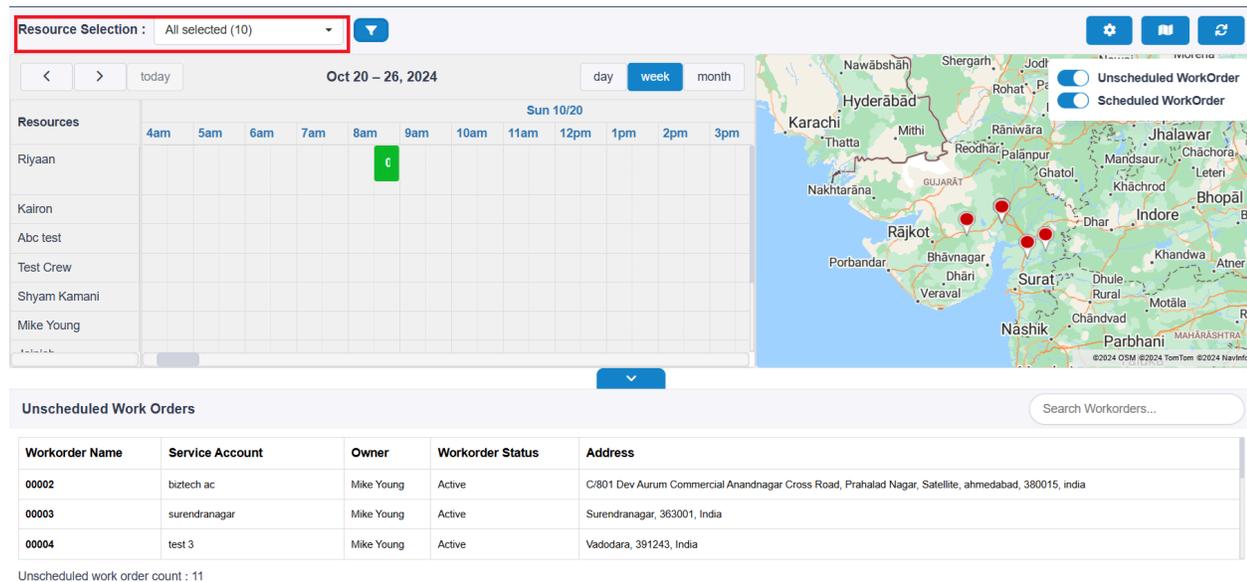
Workorder Name	Service Account	Owner	Workorder Status	Address
00001	alaska	Mike Young	Active	Southeast Fairbanks, United States
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India

Unscheduled work order count : 12

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



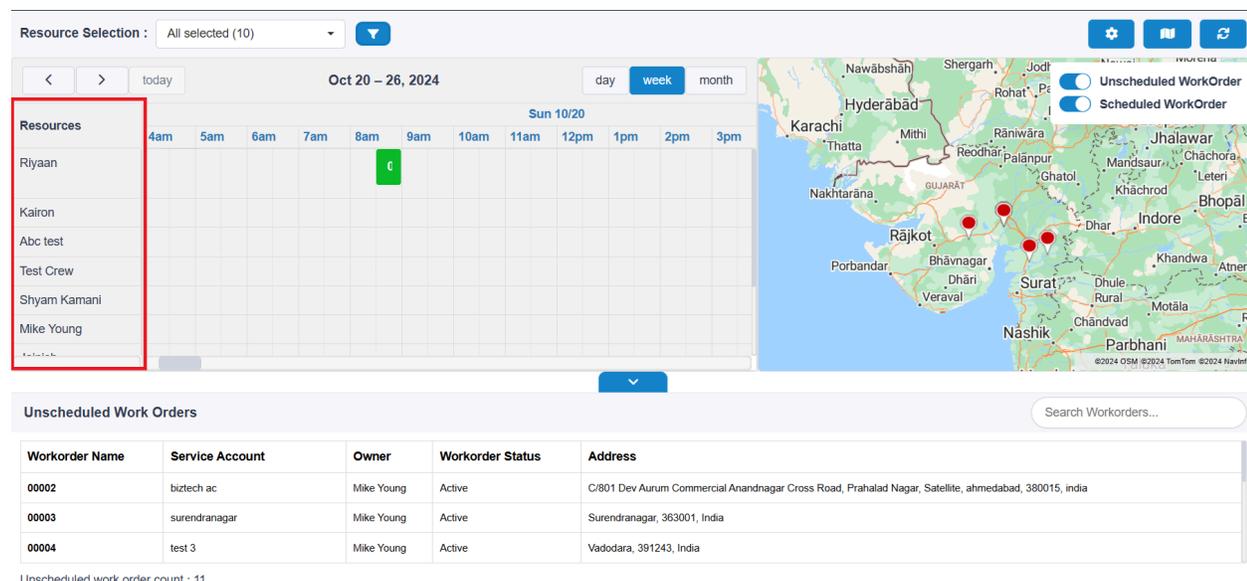
The screenshot displays the 'Resource Management' interface. At the top, there is a 'Resource Selection' dropdown menu with a red box around it, currently showing 'All selected (10)'. Below this is a calendar view for 'Sun 10/20' with a grid of time slots from 4am to 3pm. A resource named 'Riyaan' has a green 'c' icon in the 8am slot. To the right is a map of India with red pins indicating booking locations. Below the calendar and map is a table titled 'Unscheduled Work Orders' with columns for Workorder Name, Service Account, Owner, Workorder Status, and Address. The table contains three entries with IDs 00002, 00003, and 00004.

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 : 11

The

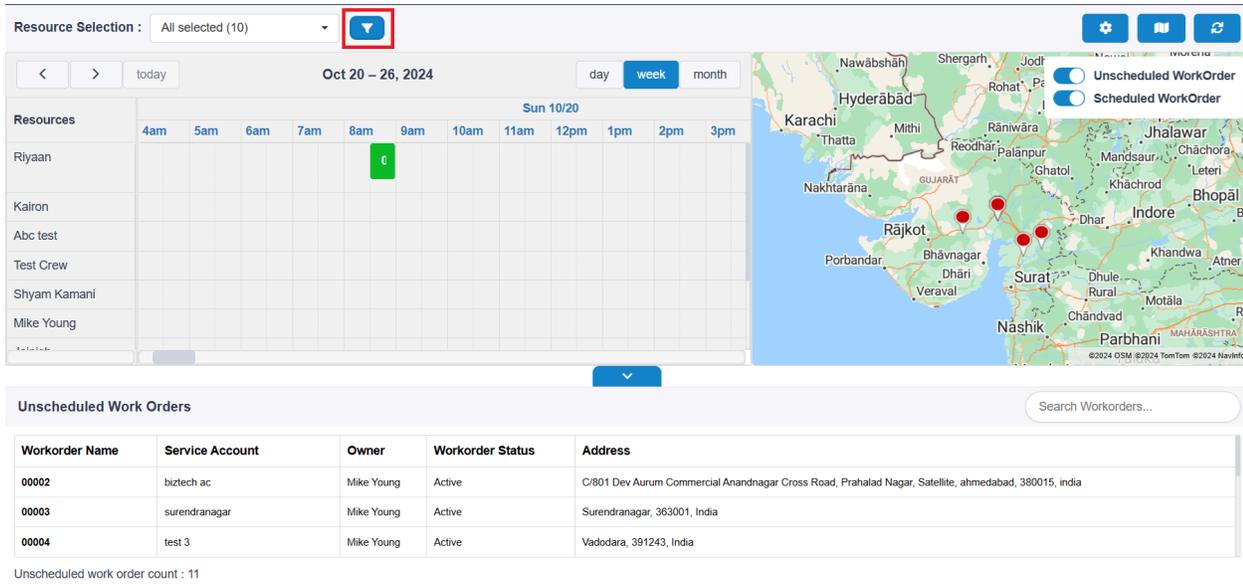
Resource Selection Field is a multi-select option that lists all available users. Users can choose one or multiple resources from this list. Once selected, these resources are displayed in the Calendar Resource Section for easy scheduling and management.



This screenshot is identical to the previous one, but with a red box highlighting the 'Resource Selection' dropdown menu. The dropdown menu is currently open, showing a list of resources: Riyaan, Kairon, Abc test, Test Crew, Shyam Kamani, and Mike Young. The rest of the interface, including the calendar, map, and work orders table, remains the same.

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

configuration settings.

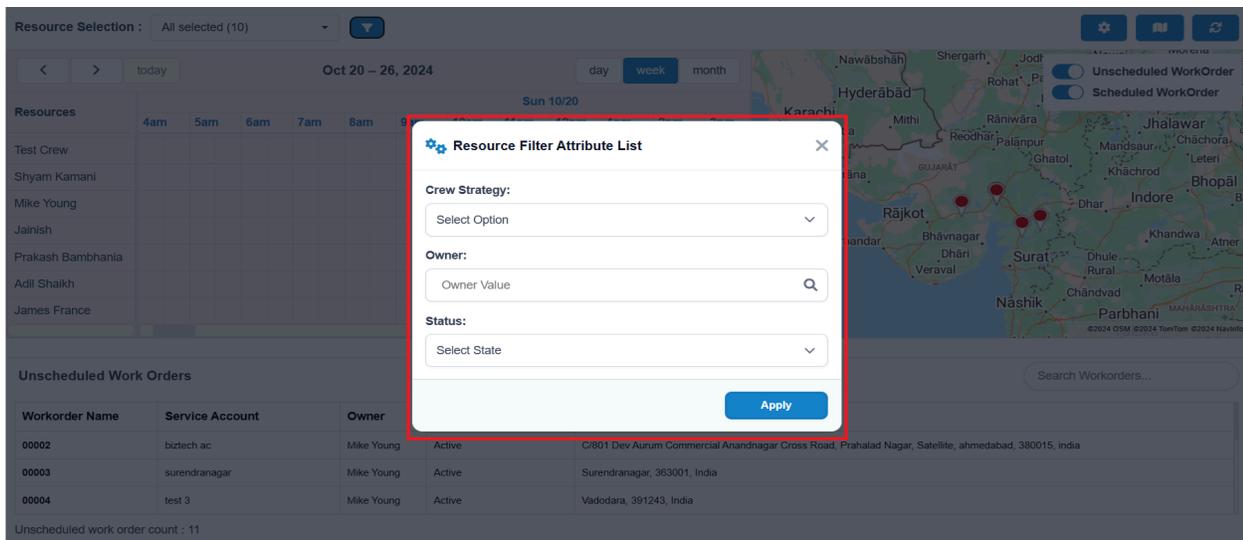


The screenshot shows the 'Resource Selection' dropdown set to 'All selected (10)' with a blue 'Apply' button highlighted by a red box. Below is a calendar view for 'Oct 20 - 26, 2024' with a resource grid. A map on the right shows work order locations. Below the calendar is a table of 'Unscheduled Work Orders'.

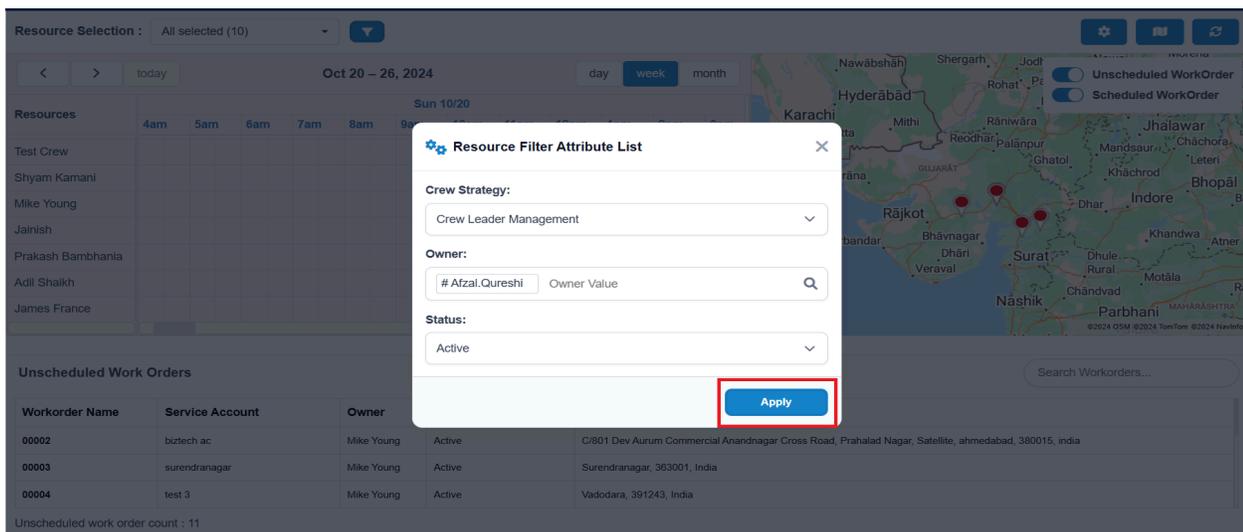
Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara,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

Unscheduled work order count : 11

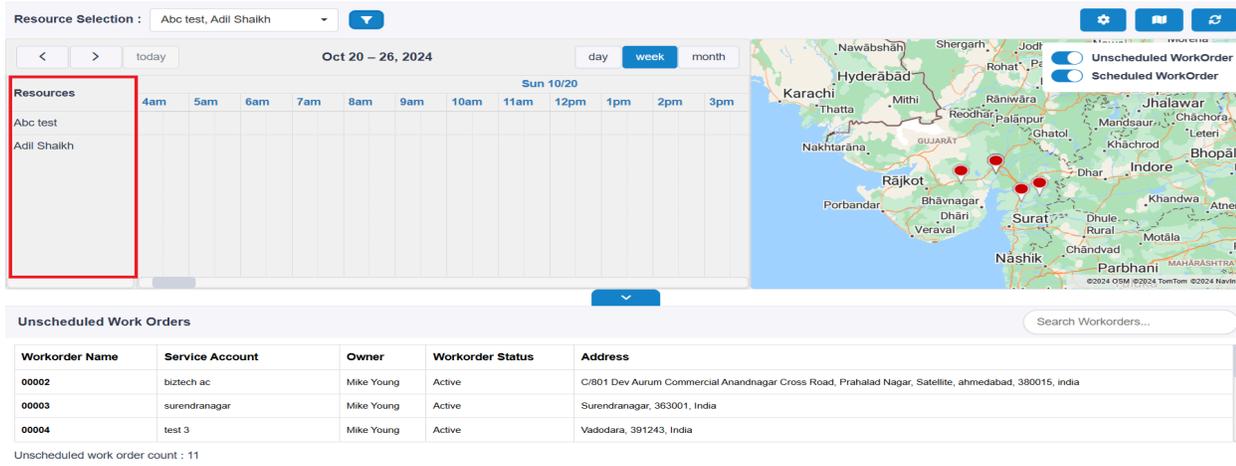
Users can fill in values according to each field's type, enabling targeted filtering. After filling in the desired criteria, clicking the Apply Button filters the resources List displayed in the calendar resource section.



The screenshot shows the 'Resource Filter Attribute List' dialog box open over the resource grid. The dialog has three fields: 'Crew Strategy:' with a dropdown menu, 'Owner:' with a search input, and 'Status:' with a dropdown menu. An 'Apply' button is at the bottom right of the dialog.



The screenshot shows the 'Resource Filter Attribute List' dialog box with filtered values: 'Crew Strategy:' is set to 'Crew Leader Management', 'Owner:' is '# Afzal.Qureshi', and 'Status:' is 'Active'. The 'Apply' button is highlighted with a red box.



Resource Selection : [Filter]

Calendar: today, Oct 20 – 26, 2024, day week month

Resources:

Resource	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Abc test												
Adli Shaikh												

Map: Shows India with pushpins in Gujarat, Maharashtra, and Rajasthan.

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 : 11

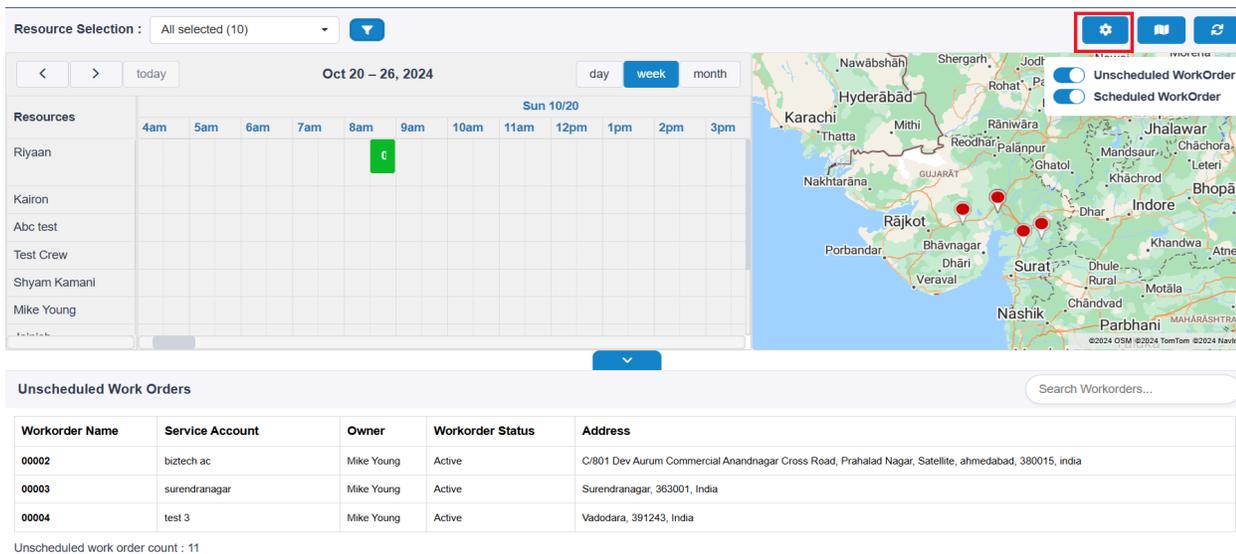
To manage filter fields efficiently, users can access Configuration Settings from the Settings menu.

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.



Resource Selection : [Filter]

Calendar: today, Oct 20 – 26, 2024, day week month

Resources:

Resource	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Riyaan					6							
Kairon												
Abc test												
Test Crew												
Shyam Kamanl												
Mike Young												

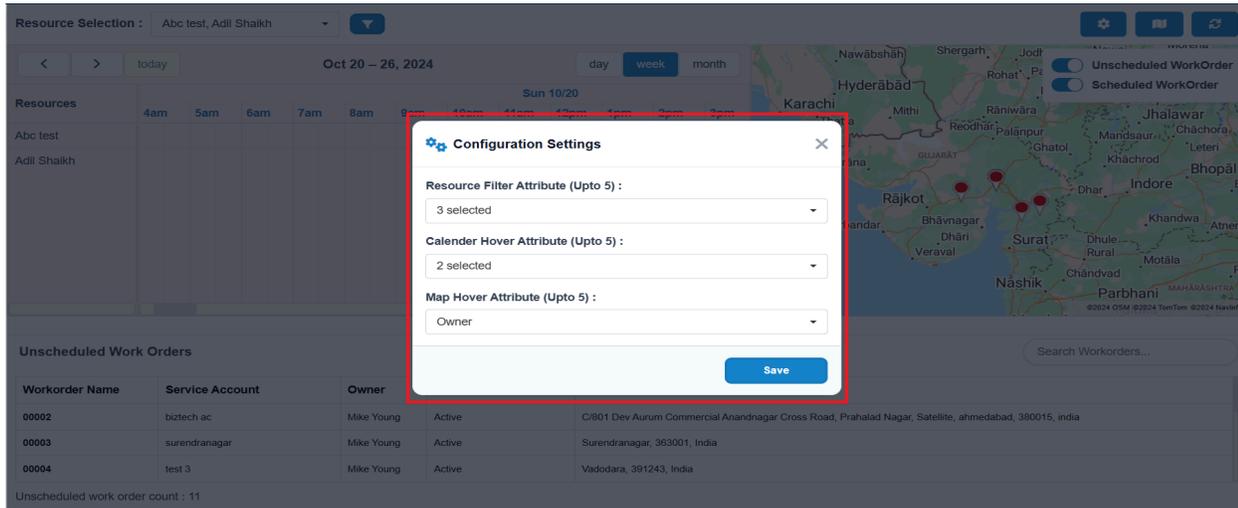
Map: Shows India with pushpins. The Settings gear icon in the top right is highlighted with a red box.

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 : 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.



Once

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, Adli Shaikh

Oct 20 – 26, 2024

Resources: Abc test, Adli Shaikh

Map: Hyderabad, Rajkot, Surat, etc.

Unscheduled WorkOrder
 Scheduled WorkOrder

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 : 11

Resource Selection : All selected (10)

Oct 20 – 26, 2024

Resources: Rlyaan, Kairon, Abc test, Test Crew, Shyam Kamani, Mike Young, Jainish

Map: Hyderabad, Rajkot, Surat, etc.

Unscheduled WorkOrder
 Scheduled WorkOrder

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 : 11

Resource Selection : Abc test, Adli Shaikh

Oct 20 – 26, 2024

Resources: Abc test, Adli Shaikh

Map: Hyderabad, Rajkot, Surat, etc.

Unscheduled WorkOrder
 Scheduled WorkOrder

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 : 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 selected (10) [Filter Icon]

today Oct 20 – 26, 2024 [Navigation Icons] day week month

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map of Ahmedabad showing a green pushpin for a scheduled work order.

Legend: Unscheduled WorkOrder, Scheduled WorkOrder

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

- **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 selected (10) [Filter Icon]

today Oct 20 – 26, 2024 [Navigation Icons] day week month

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map of Ahmedabad showing a red pushpin for an unscheduled work order.

Legend: Unscheduled WorkOrder, Scheduled WorkOrder

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

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 selected (10) [Dropdown] [Filter Icon]

Navigation: < > today Oct 20 – 26, 2024 day week month

Resources: Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: Proximity For - 00007, Enter Km (1-99), Proximity Search

Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Map Location: Ahmedabad

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

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 : All selected (10) [Dropdown] [Filter Icon]

Navigation: < > today Oct 20 – 26, 2024 day week month

Resources: Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: Gandhinagar Taluka, Ahmedabad, Mahesana, Mahemdavad, Kheda, Mahudha, Anand, Vadod

Map Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Unscheduled Work Orders

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 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 selected (10) [Dropdown] [Refresh]

Navigation: < > today Oct 20 – 26, 2024 [Calendar] day week month

Resources Grid (Sun 10/20):

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: [Map showing location markers]

Unscheduled Work Orders [Toggle]

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

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 selected (10) [Dropdown] [Refresh]

Navigation: < > today Oct 20 – 26, 2024 [Calendar] day week month

Resources Grid (Sun 10/20):

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

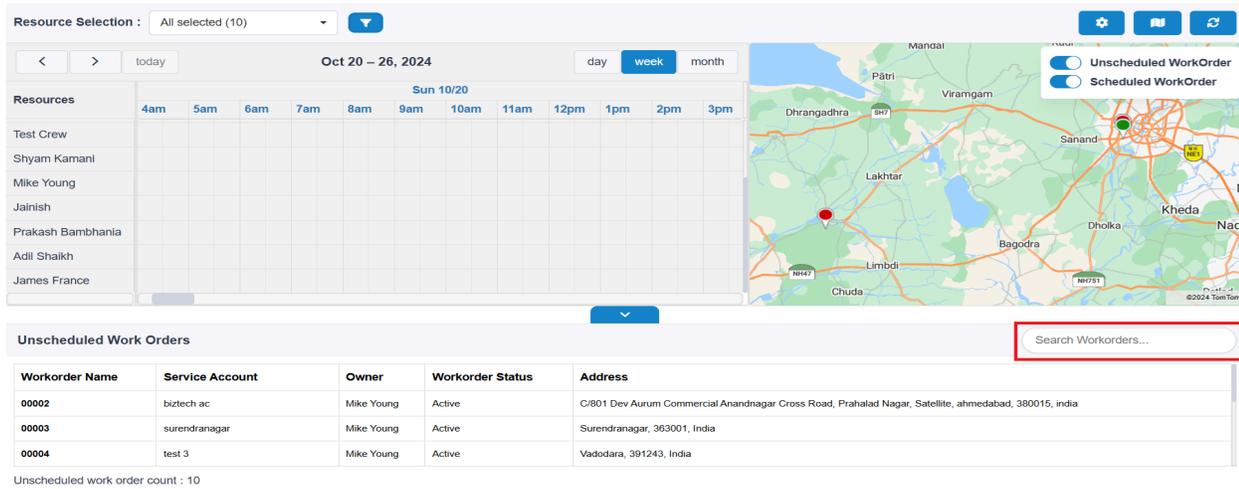
Map: [Map showing location markers]

Unscheduled Work Orders [Toggle] [Refresh]

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

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 selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Unscheduled Work Orders

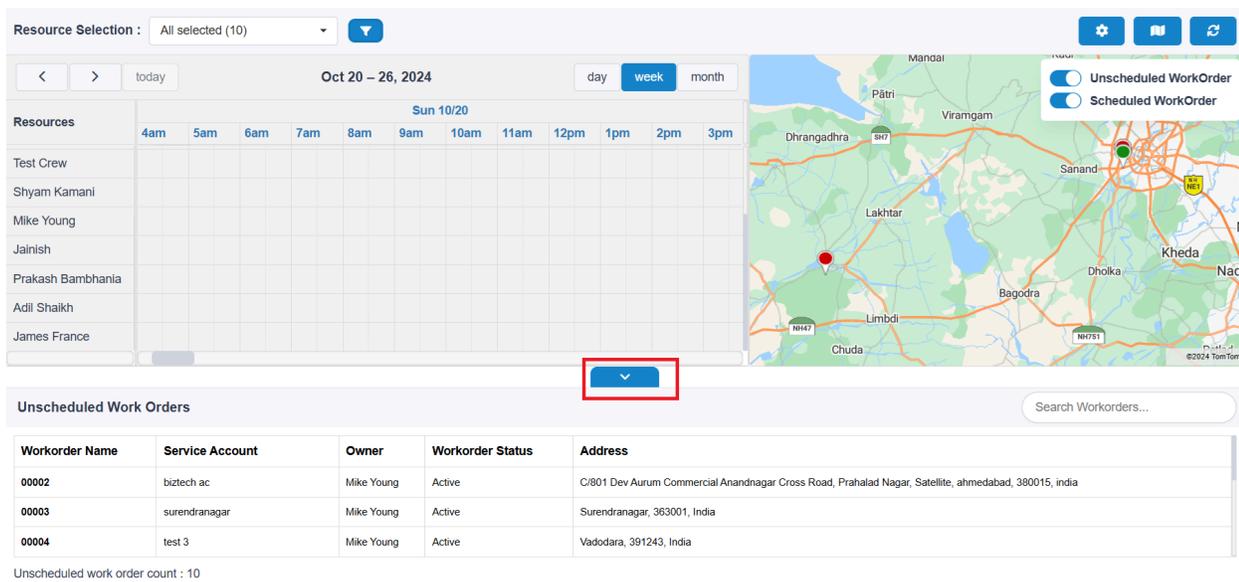
Search Workorders...

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

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

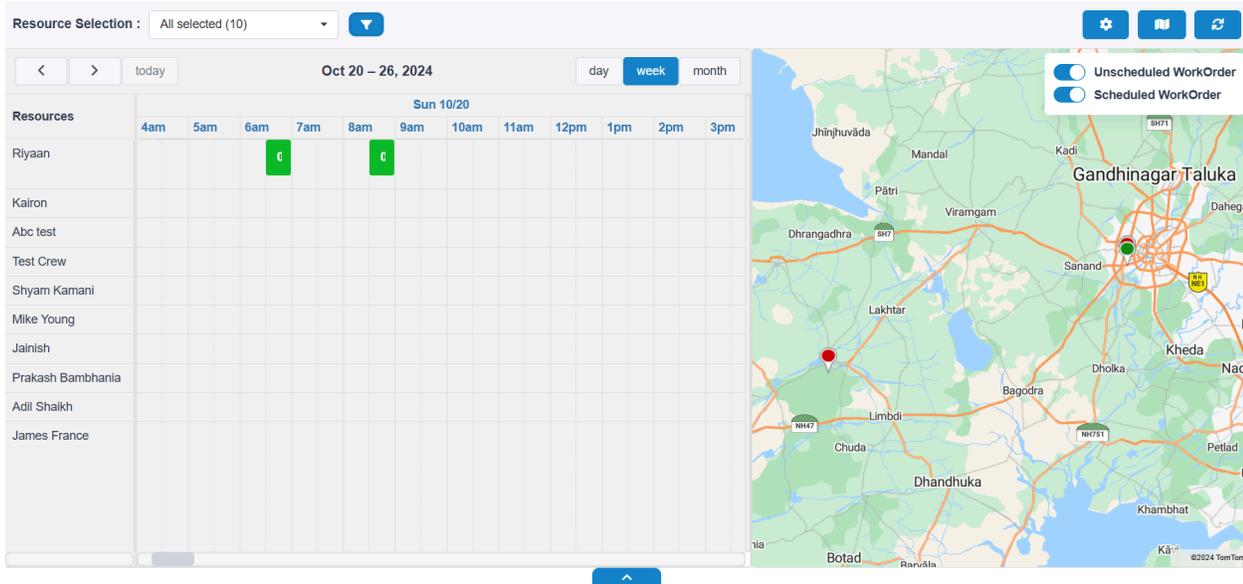
Resources	4am	5am	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Unscheduled Work Orders

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

Unscheduled work order count : 10



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

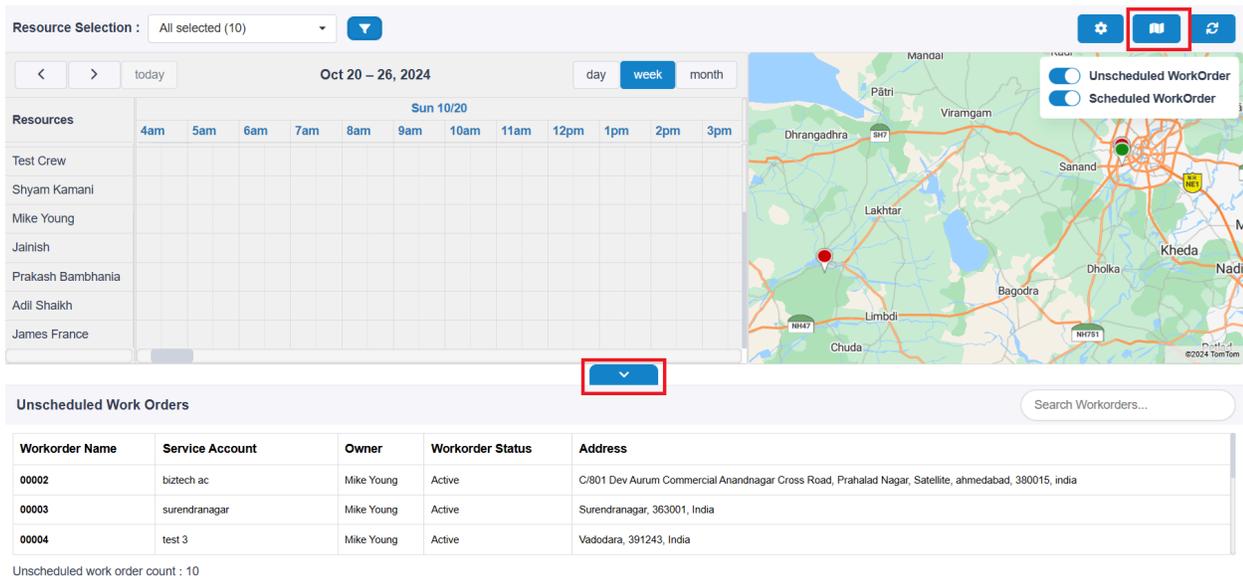
Resources: Rilyaan, Kairon, Abc test, Test Crew, Shyam Kamani, Mike Young, Jainish, Prakash Bambhania, Adil Shaikh, James France

Map: Gandhinagar Taluka, locations include Jhinhuvada, Mandal, Kadi, Pātri, Viramgam, Dhrangadhra, Sanand, Lakhtar, Bagodra, Dholka, Kheda, Nadi, Chuda, Limbdi, Dhandhuka, Botad, Rarvāla, Khambhat, Kā.

Legend: Unscheduled WorkOrder, Scheduled WorkOrder

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.



Resource Selection : All selected (10)

Oct 20 – 26, 2024

Sun 10/20

Resources: Test Crew, Shyam Kamani, Mike Young, Jainish, Prakash Bambhania, Adil Shaikh, James France

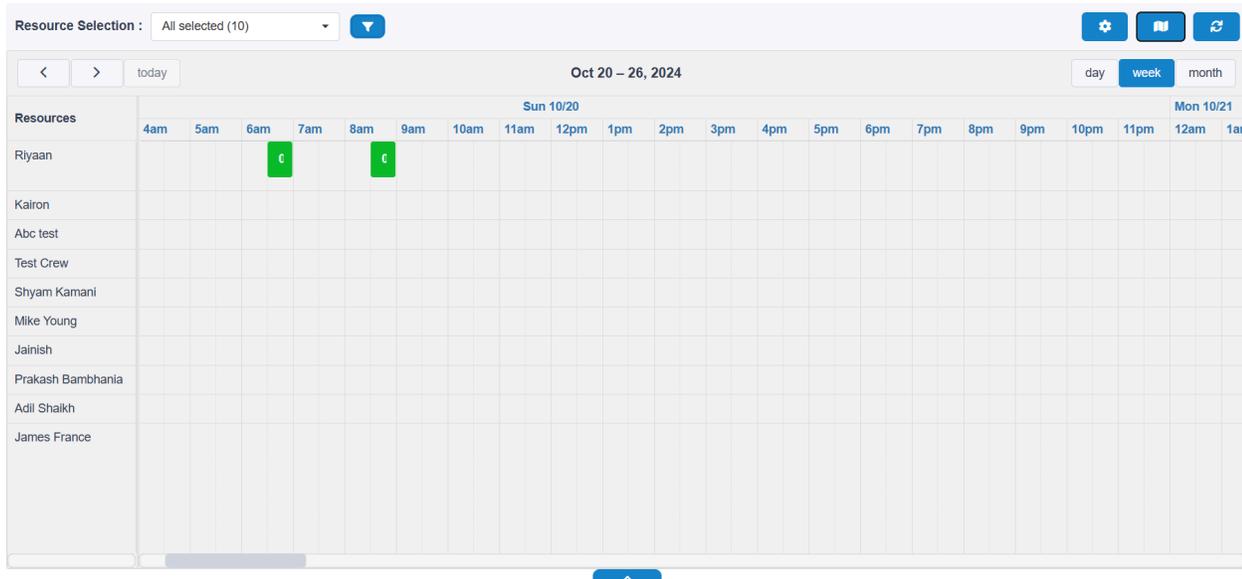
Map: Gandhinagar Taluka, locations include Mandal, Pātri, Viramgam, Dhrangadhra, Sanand, Lakhtar, Bagodra, Dholka, Kheda, Nadi, Chuda, Limbdi, Dhandhuka, Botad, Rarvāla, Khambhat, Kā.

Legend: Unscheduled WorkOrder, Scheduled WorkOrder

Unscheduled Work Orders

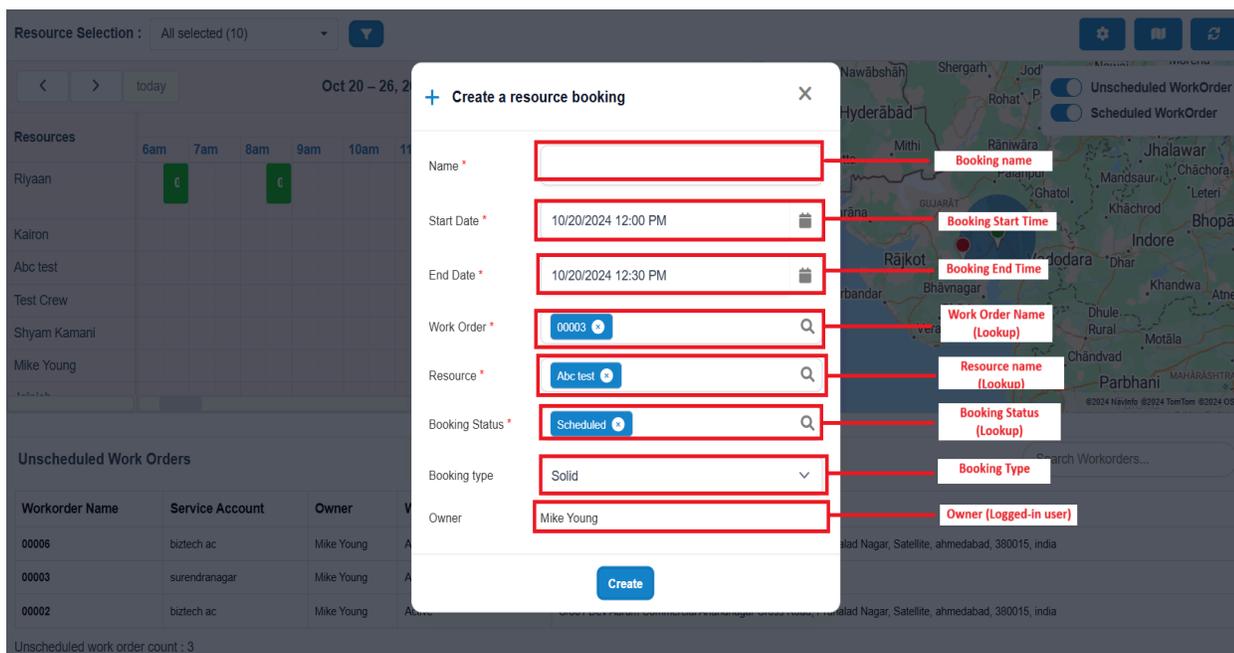
Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech.ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara,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

Unscheduled work order count : 10



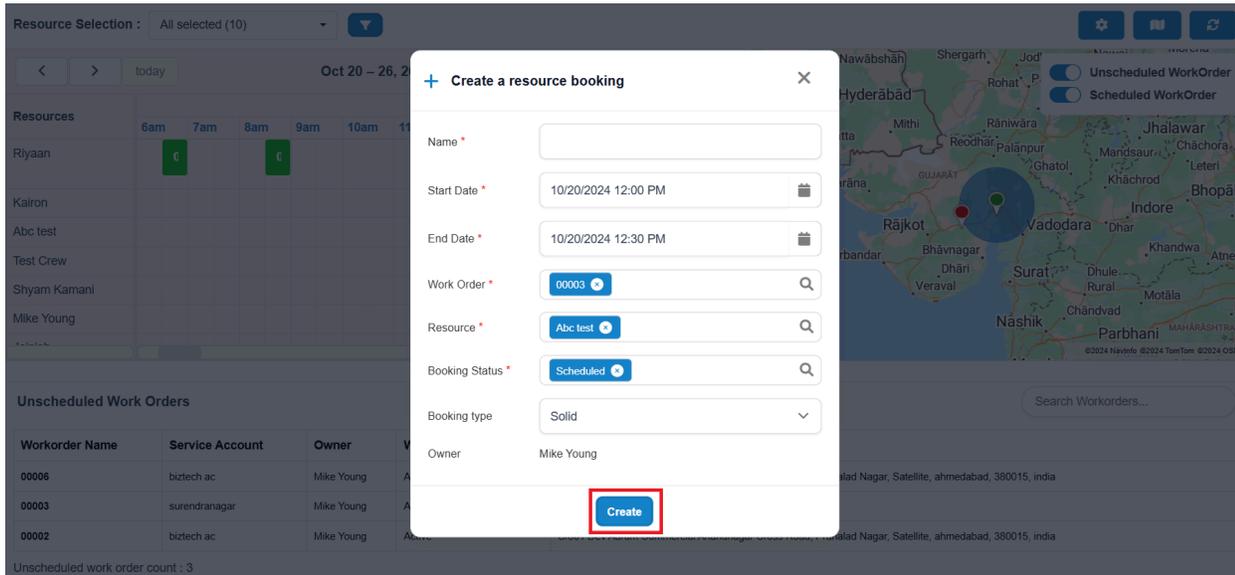
Users can create a booking according to resources using the **drag-and-drop** feature. This intuitive functionality allows users to drag a work order from the grid and drop it onto the calendar.

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.



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.



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 selected (10) [Dropdown]

Oct 20 – 26, 2024 [Calendar]

Sun 10/20

Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Riyaan	6											
Kalron				00001								
Abc test												
Test Crew												
Shyam Kamani												
Mike Young												

Map: Hyderabad, Rajkot, Vadodara, Surat, etc.

Work Order: 00001
Work Location: Onsite

Unscheduled Work Orders

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

Resource Selection : All selected (10) [Dropdown]

Oct 20 – 26, 2024 [Calendar]

Sun 10/20

Resources	6am	7am	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Test Crew												
Shyam Kamani												
Mike Young												
Jainish												
Prakash Bambhania												
Adil Shaikh												
James France												

Map: Hyderabad, Rajkot, Vadodara, Surat, etc.

Workorder name :- 00003
Owner: Mike Young

Unscheduled Work Orders

Search Workorders...

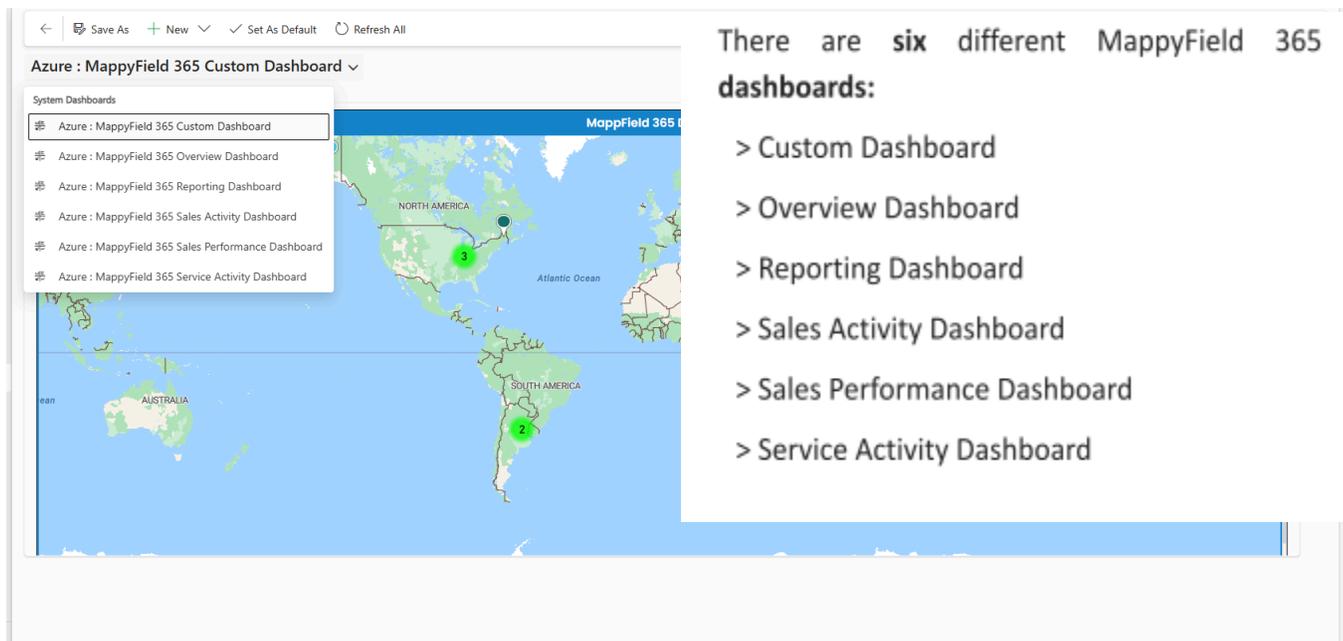
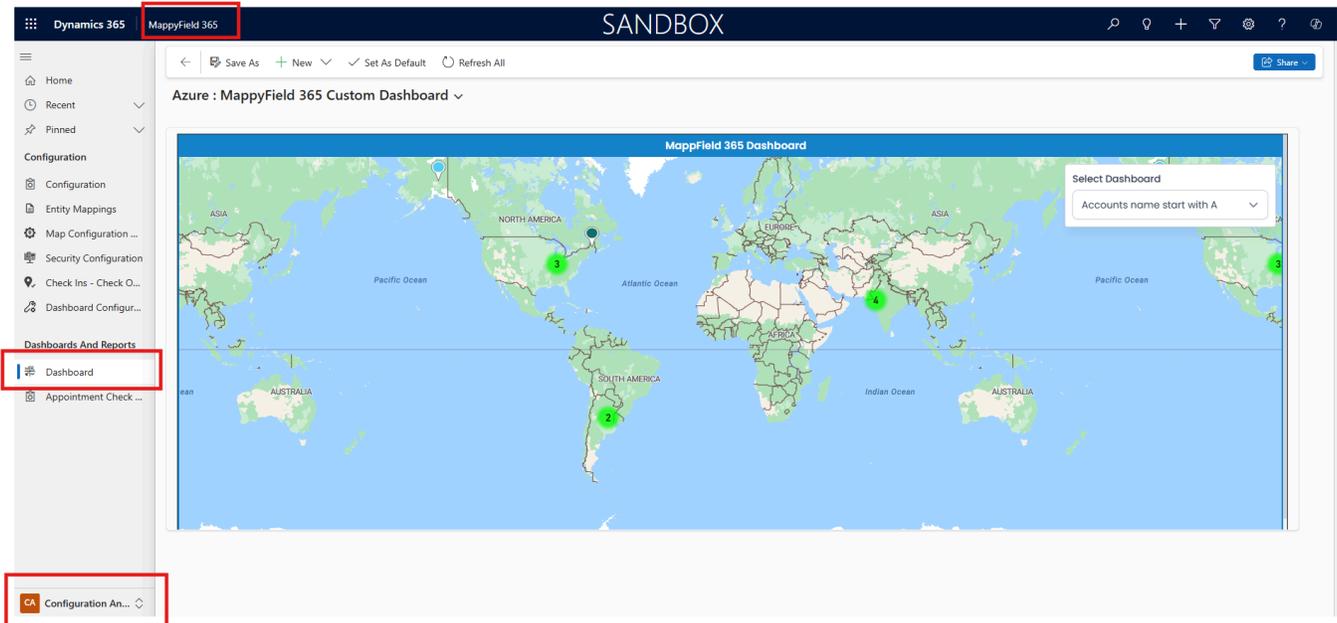
Workorder Name	Service Account	Owner	Workorder Status	Address
00002	biztech ac	Mike Young	Active	C/801 Dev Aurum Commercial Anandnagar Cross Road, Prahalad Nagar, Satellite, ahmedabad, 380015, india
00003	surendranagar	Mike Young	Active	Surendranagar, 363001, India
00004	test 3	Mike Young	Active	Vadodara,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

Unscheduled work order count : 10

Analytical Dashboard

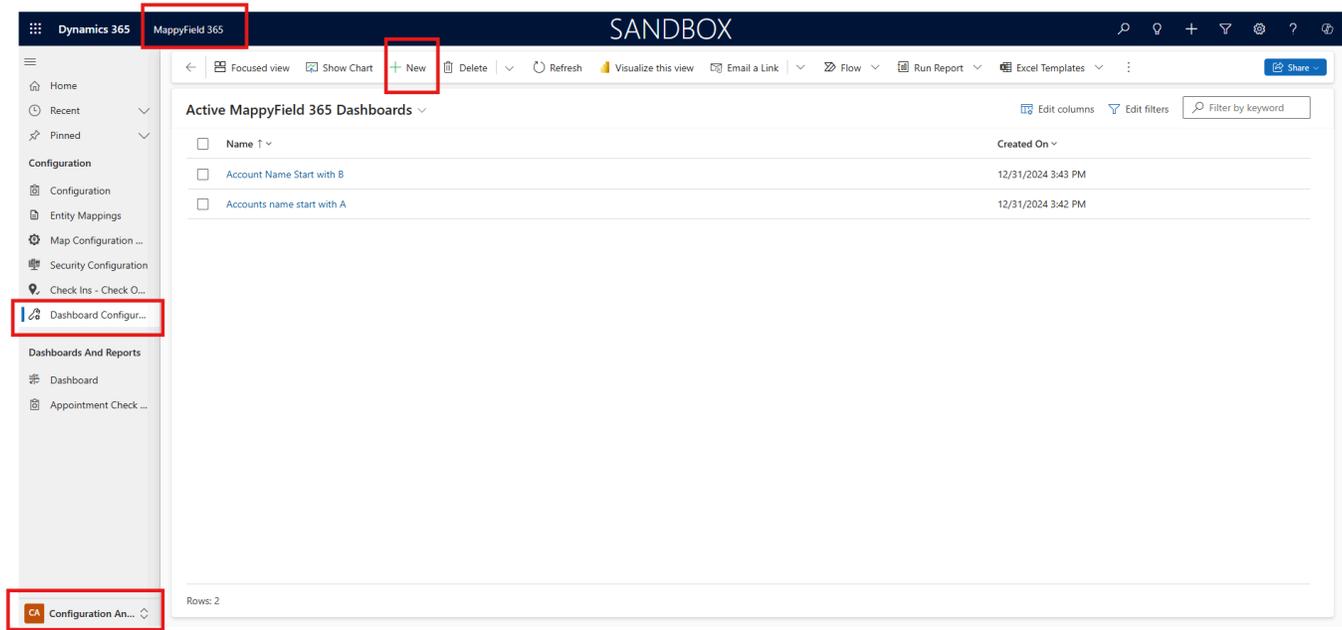
Note: Available for Azure maps only

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

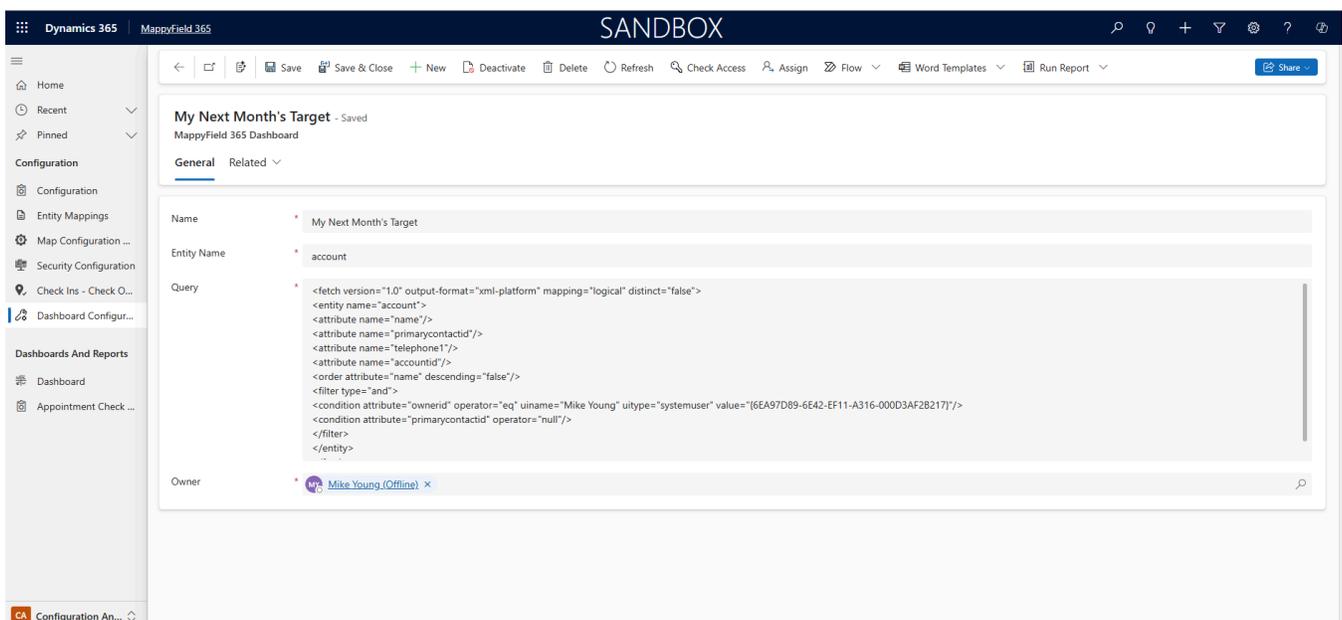


Azure: MappyField 365 Custom Dashboard

- 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

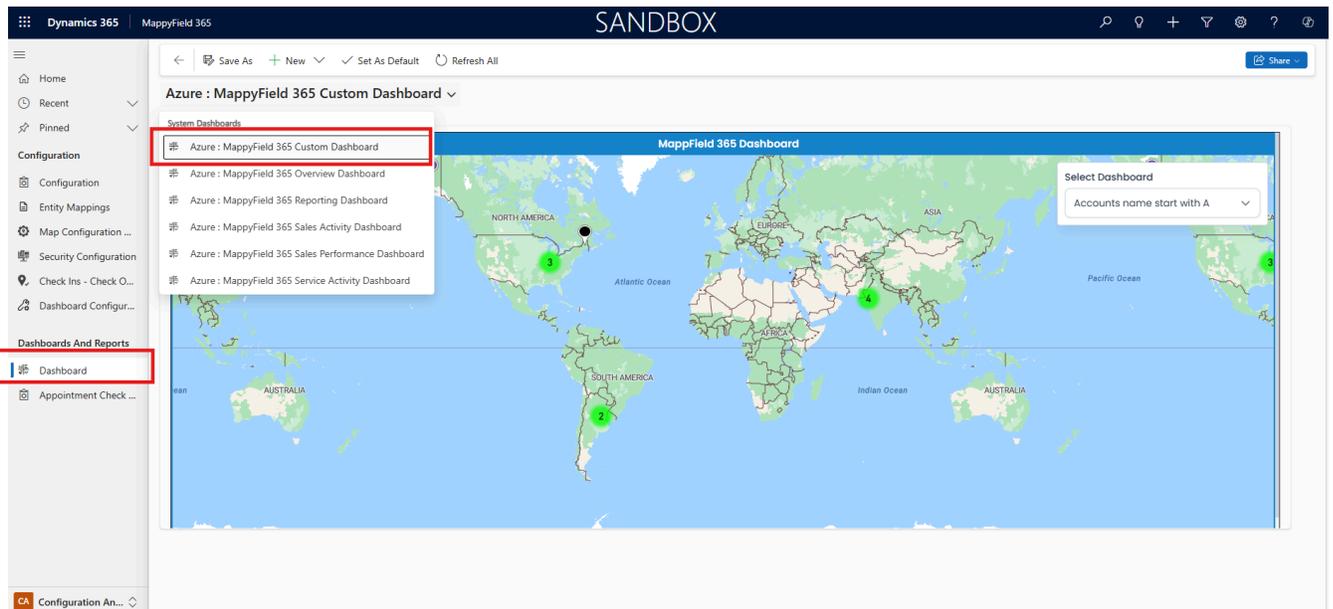


- From the **Dashboard Configuration**, you can create a new customized dashboard as per your requirement, for that click on the **+ New**.

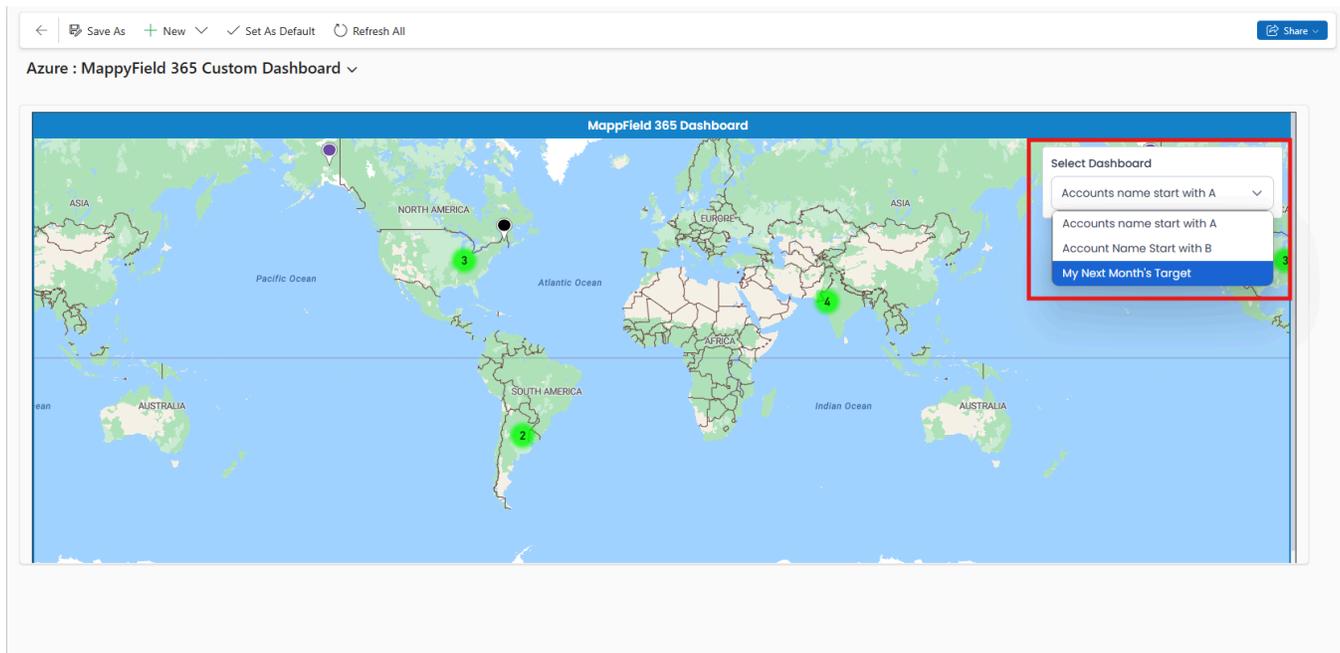


- You need to insert the following details to customize the dashboard:
 - **Name:** Insert the relevant name for the Custom dashboard
 - **Entity Name:** Insert the Entity name.
 - **Query:** Insert the Query to customize the records.

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

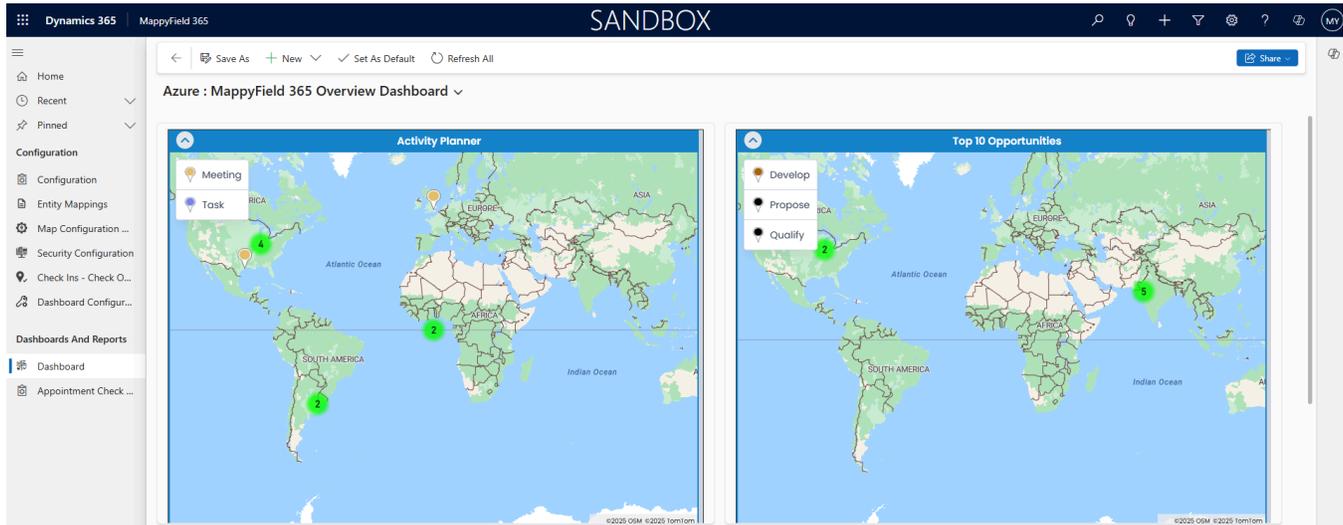


- By clicking on the **MappyField 365 Custom Dashboards**, you will get the Custom dashboard which you have configured.

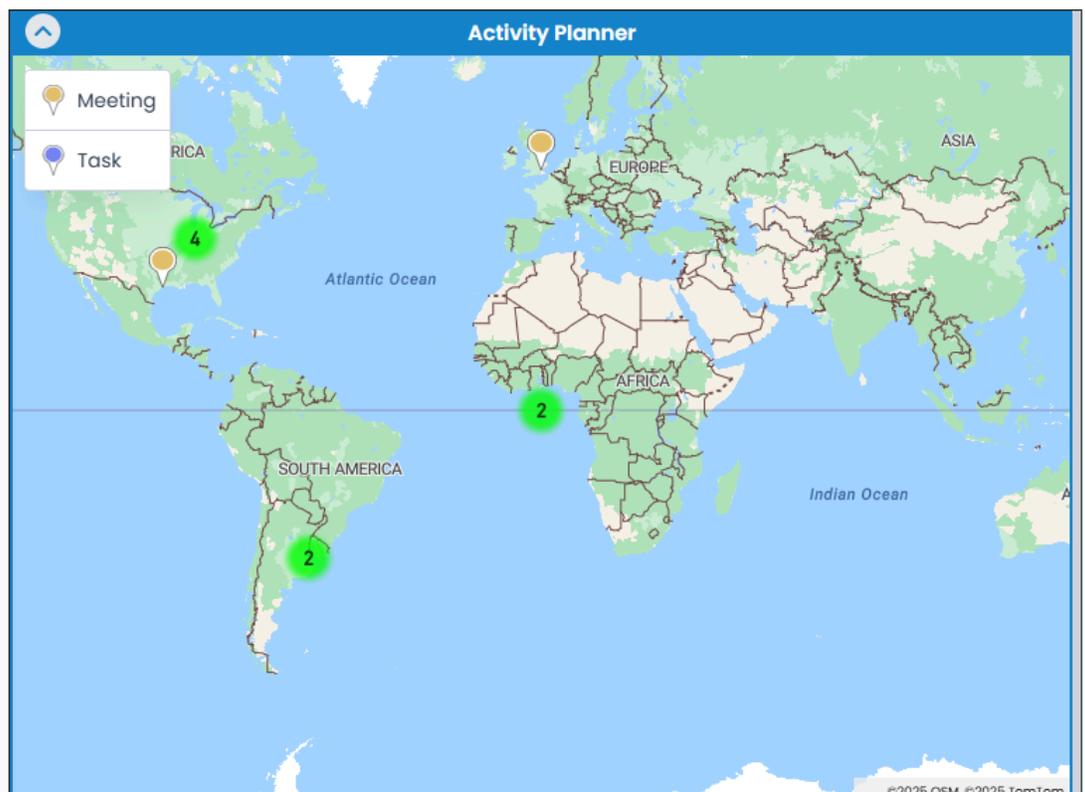


Azure: MappyField 365 Overview Dashboard

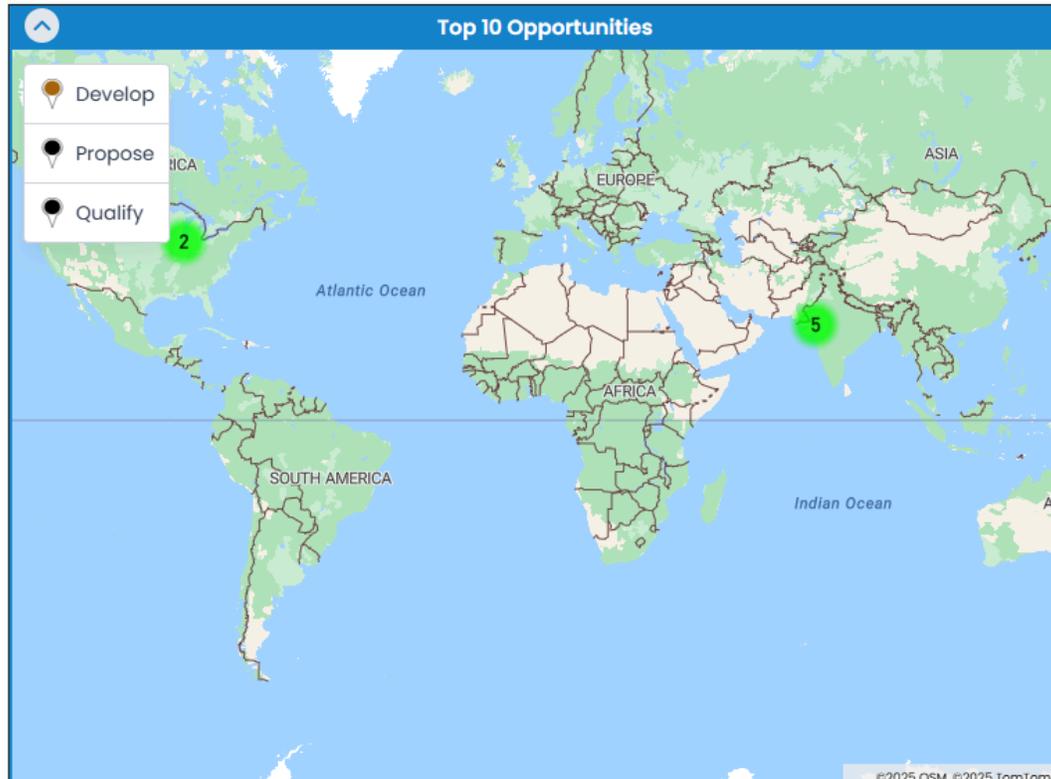
- You will get the **Azure Overview Dashboard** with following dashlets:
 - > Activity Planner
 - > Top 10 Opportunities



- **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:	To:	Activity Status:	User/Team:	
01-01-2024	19-03-2025	All selected (4)	Mike Young	
Search: <input type="text"/>				
Activity Type	Activity Count	Activity Duration		
Meeting	166	84 Hr		
Task	1	0 Min		
Showing 1 to 2 of 2 entries				
<input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="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:

Date: Status:

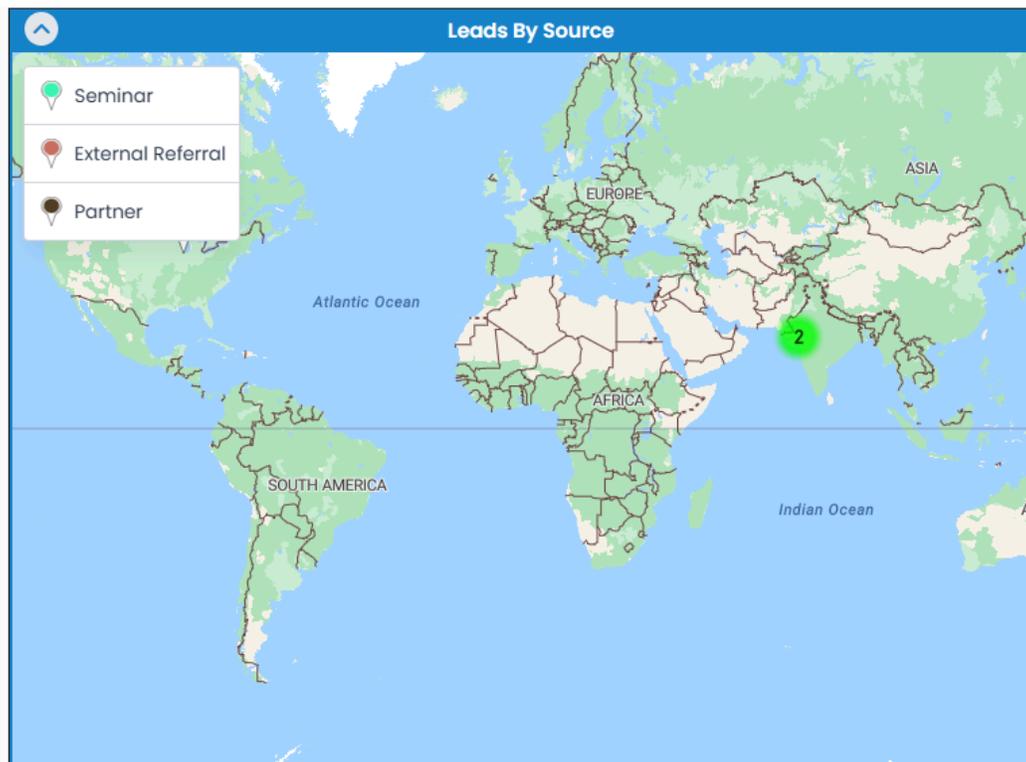
Search:

Route Name	Assigned By	Priority	Travel Distance	Status	Action
Business Trip	Mike Young	Low	-	<input type="text" value="Open"/>	<input type="button" value="Eye"/> <input type="button" value="Refresh"/>
Client meeting	Mike Young	High	-	<input type="text" value="Open"/>	<input type="button" value="Eye"/> <input type="button" value="Refresh"/>
Product Distribution	Mike Young	Normal	-	<input type="text" value="Open"/>	<input type="button" value="Eye"/> <input type="button" value="Refresh"/>

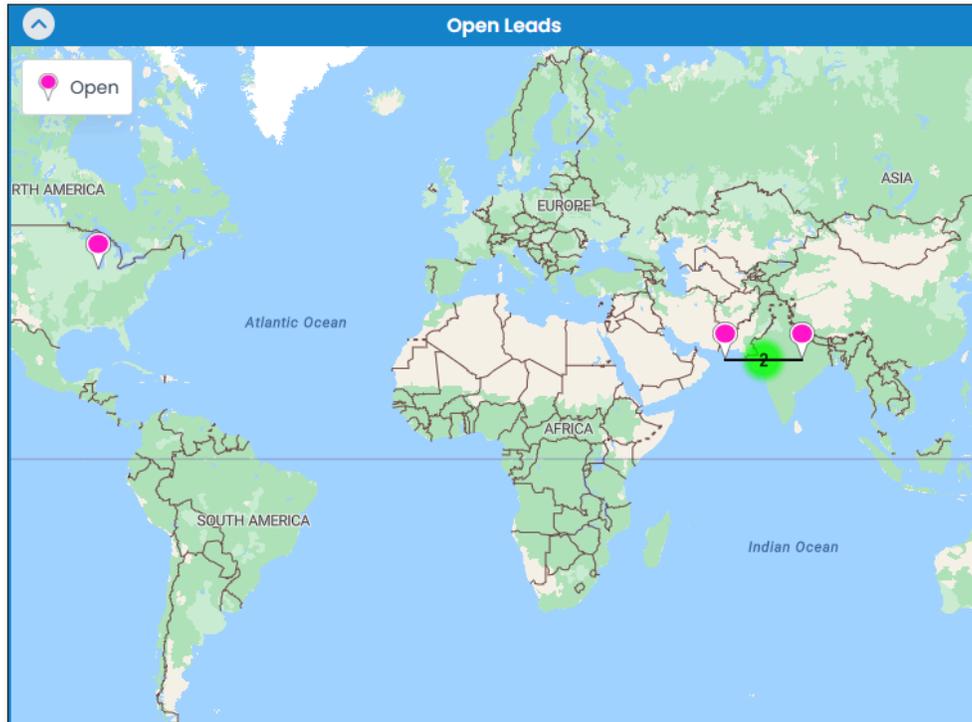
Showing 1 to 3 of 3 entries

Azure: MappyField 365 Sales Activity Dashboard

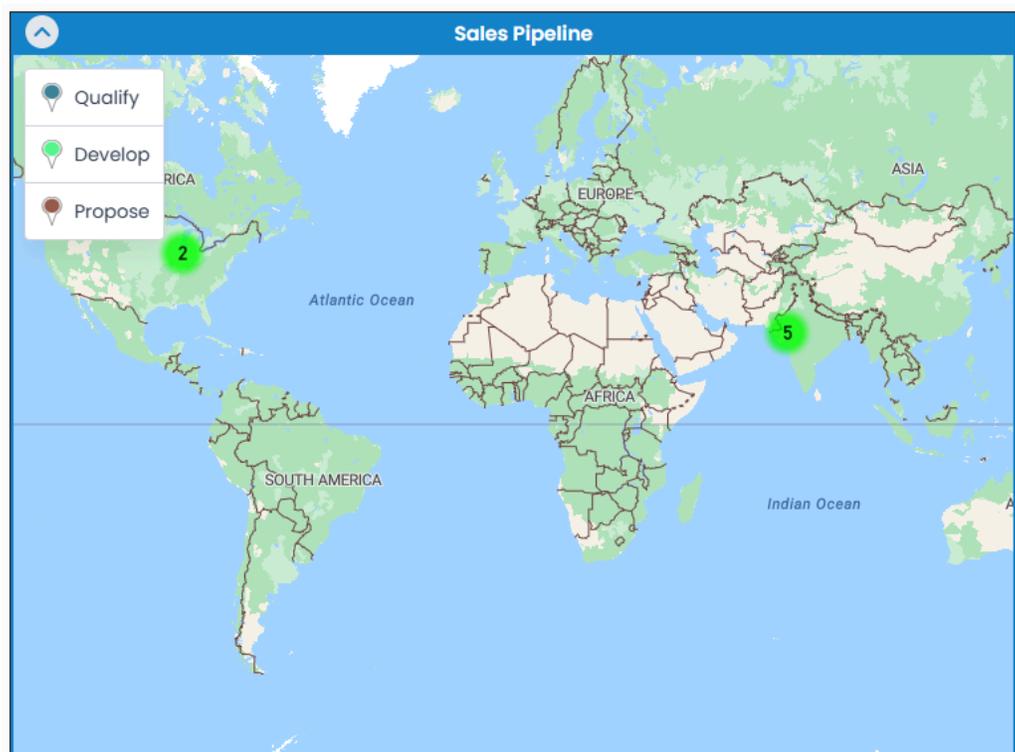
- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
 - > Lead By Source
 - > Open Leads
 - > Sales Pipeline
 - > Top 10 Invoices
- **Leads by Source:** It will display all open leads based on their source creation. It can 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.



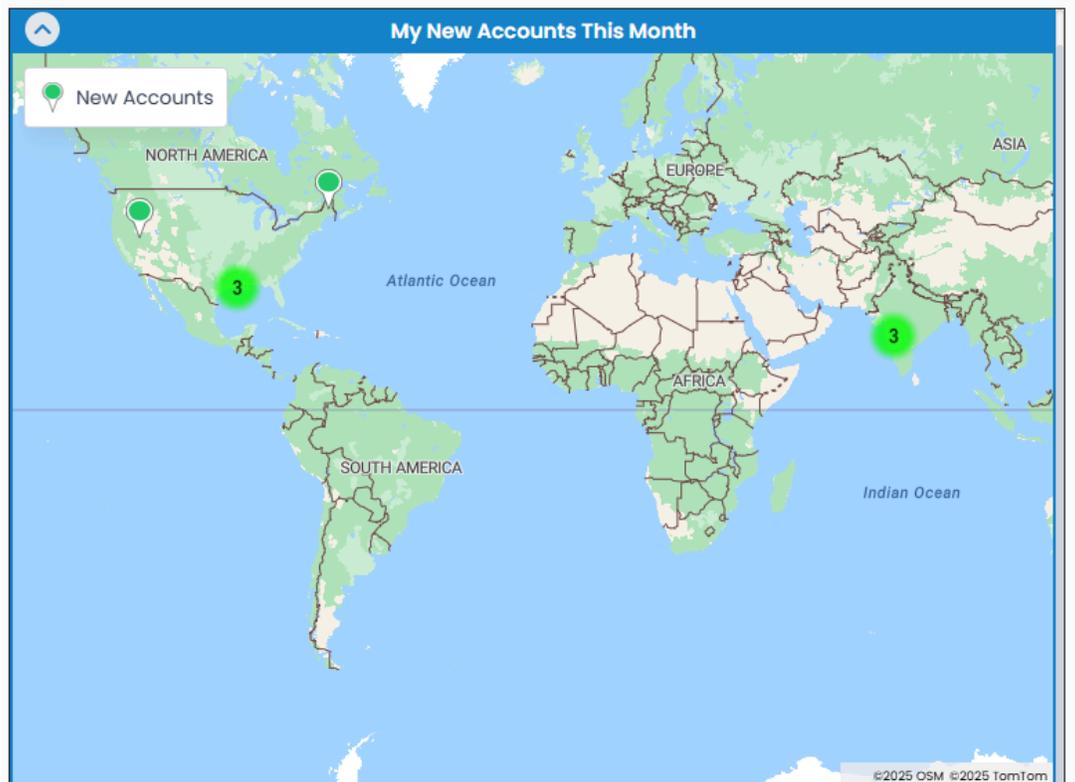
- **Sales Pipeline:** It will display all open opportunities based on the revenue. Opportunities shown are bifurcated based on their stages like Qualify, Develop, Propose.



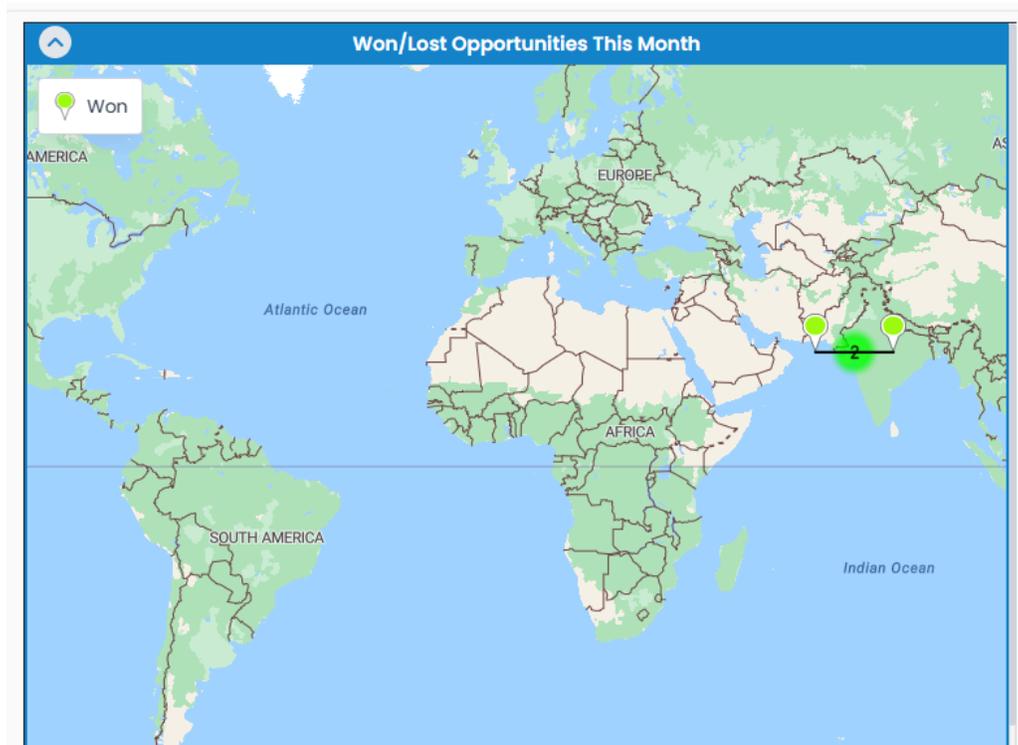
- **Top 10 Invoices:** It will display Top 10 Invoices with respect to total amount of the invoice.

Azure: MappyField 365 Sales Performance Dashboard

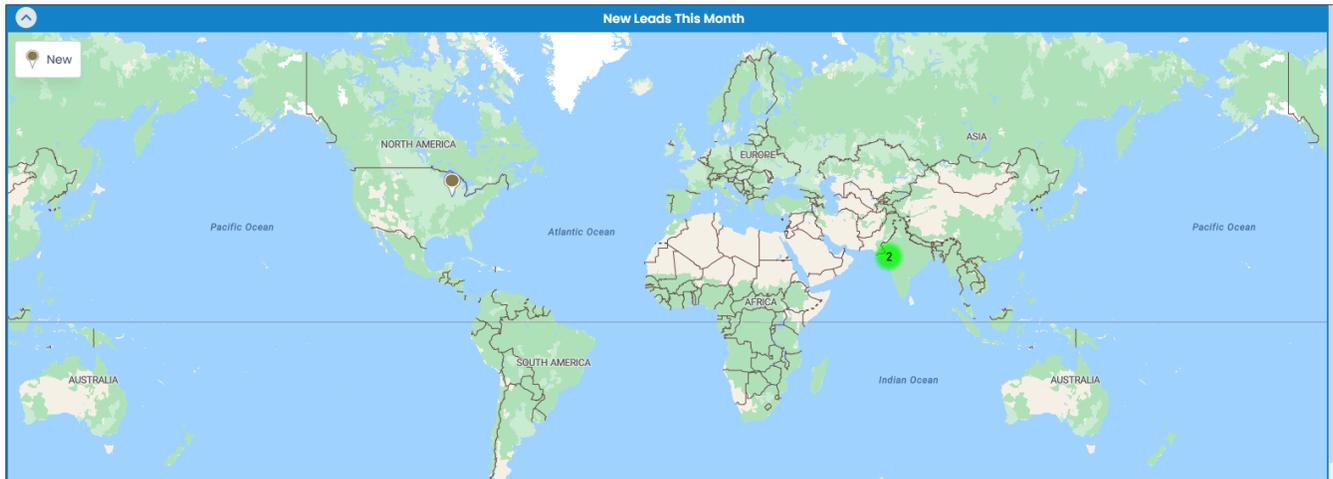
- By clicking on **MappyField 365 Sales Activity Dashboard**, you will get the Dashboard of Sales Activities with following dashlets:
 - > My New Accounts This Month > Won/Lost Opportunities This Month > New Leads This Month
 - **My New Accounts This Month:** It will display all open leads created this 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.

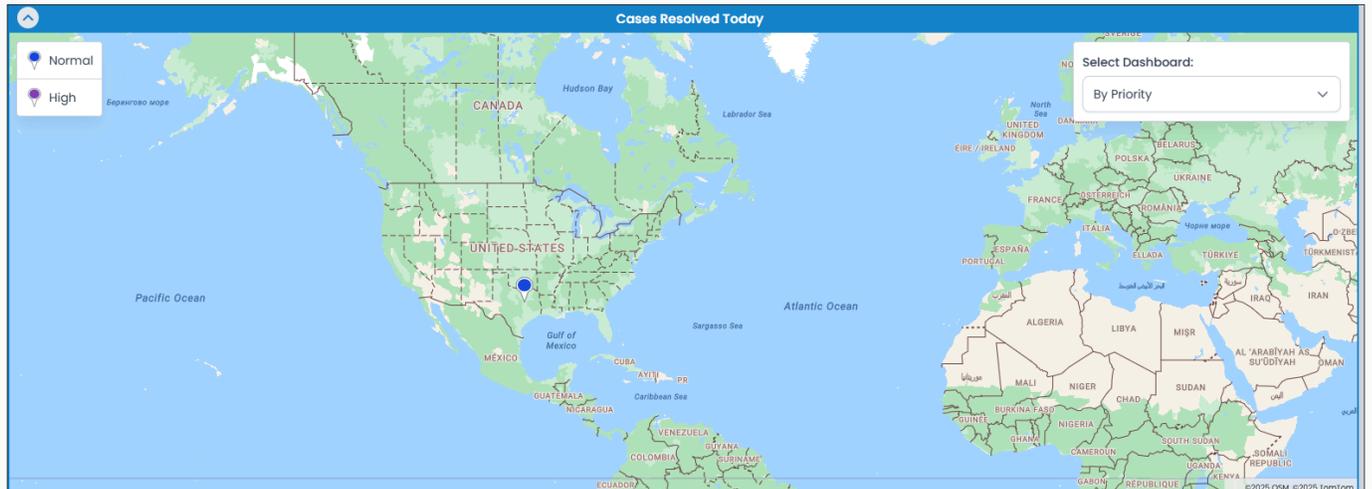


Azure: MappyField 365 Service Activity Dashboard

- 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.



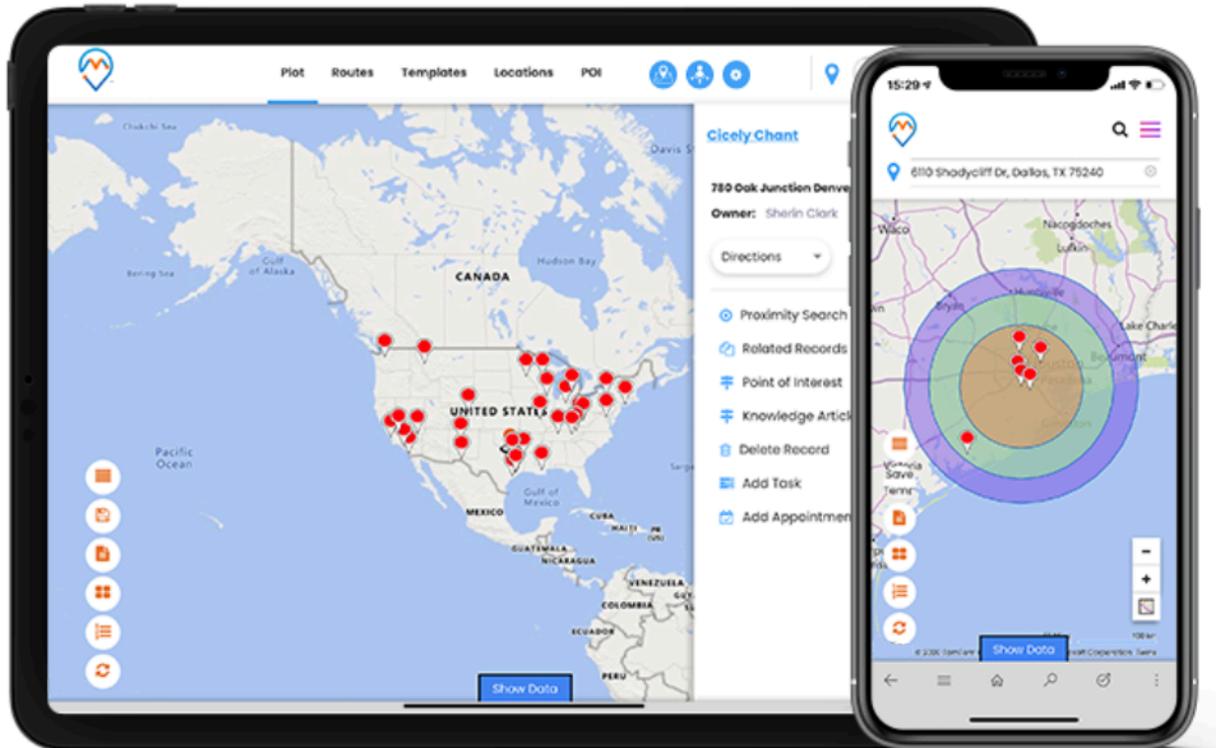
- **Cases Resolved Today:** This dashlet would show all the cases resolved on a particular day for the currently logged in user. It can be further filtered based on origin, priority and type.



Note: 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.



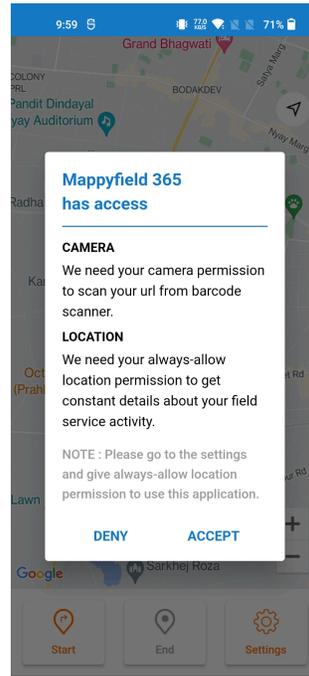
Mobile Application - Live Tracking

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.

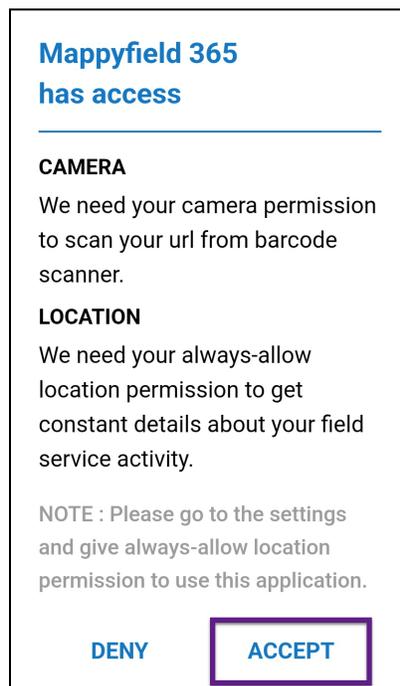
After the installation of the mappyfield application you have to enter the domain link in order to access the live tracking of your employees.



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.



Contact Us

We simplify your business, offer unique business solutions in digital web and IT landscapes.

Live Chat

Get instant support with our Live Chat.

Visit our product page at:
<https://www.appjetty.com/dynamics365-mappyfield-365.htm> and click on the Live Chat button for instant support.

Tickets

Raise tickets for your specific question!

Send an email to support@appjetty.com or you can login to your account @ www.appjetty.com and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

Customization:

If you would like to customize or discuss about additional features for Dynamics CRM MappyField 365, please write to sales@appjetty.com