USER MANUAL

MappyField 365

"Installation & General Configuration"

Version: 7.1

Compatibility:

Dynamics 365 Online or PowerApps (Dataverse)

A Biztech Company

TABLE OF CONTENTS

Introduction

AppJetty MappyField 365 plugin provides geo-analytical solutions to **Dynamics CRM** users and helps them to plot CRM data in maps. In this user manual, we have explained **installation**, **activation**, & **configuration** of the MappyField 365 plugin in the DynamicsCRM.

MappyField 365 Map view *and its* ***Functionality*** *user manual is separate. In that manual we have explained the features and functionality of the MappyField 365.*

Compatibility

- Microsoft Dynamics 365 (Online and Dataverse)

Prerequisites

Following requirement must be followed before starting the Plugin installation:

- You should be logged into Dynamics CRM 2016 or Dynamics 365, Online or On-premises.
- 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?

Installation & Activation

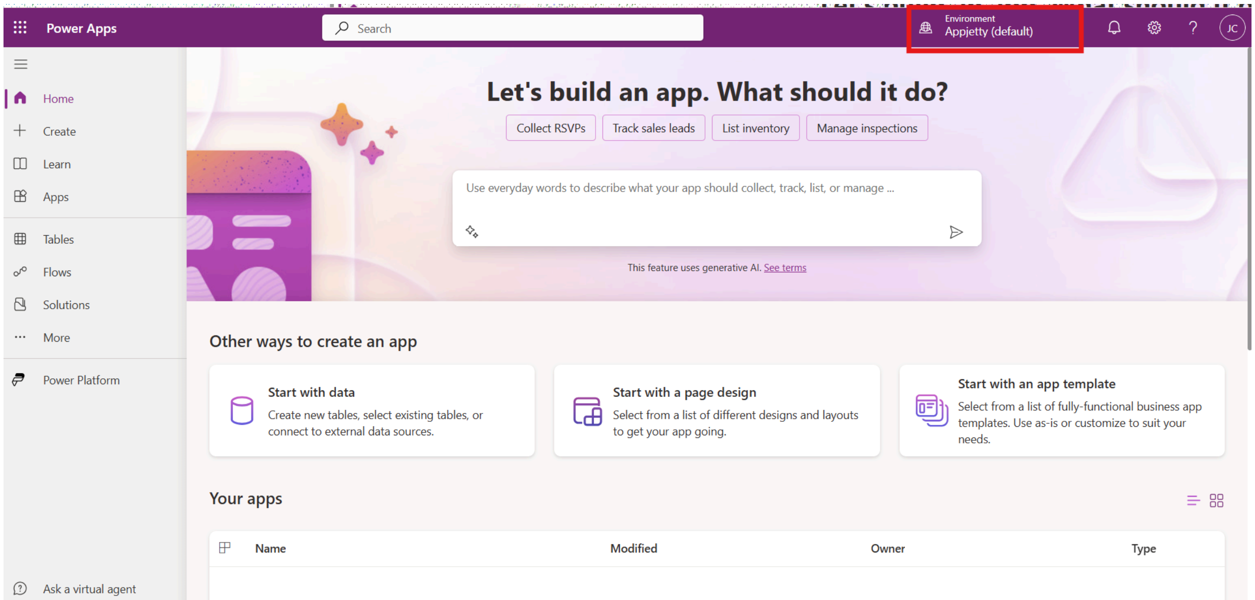
Installation Steps

 To install **'MappyField 365' plugin**, the following steps are to be followed:

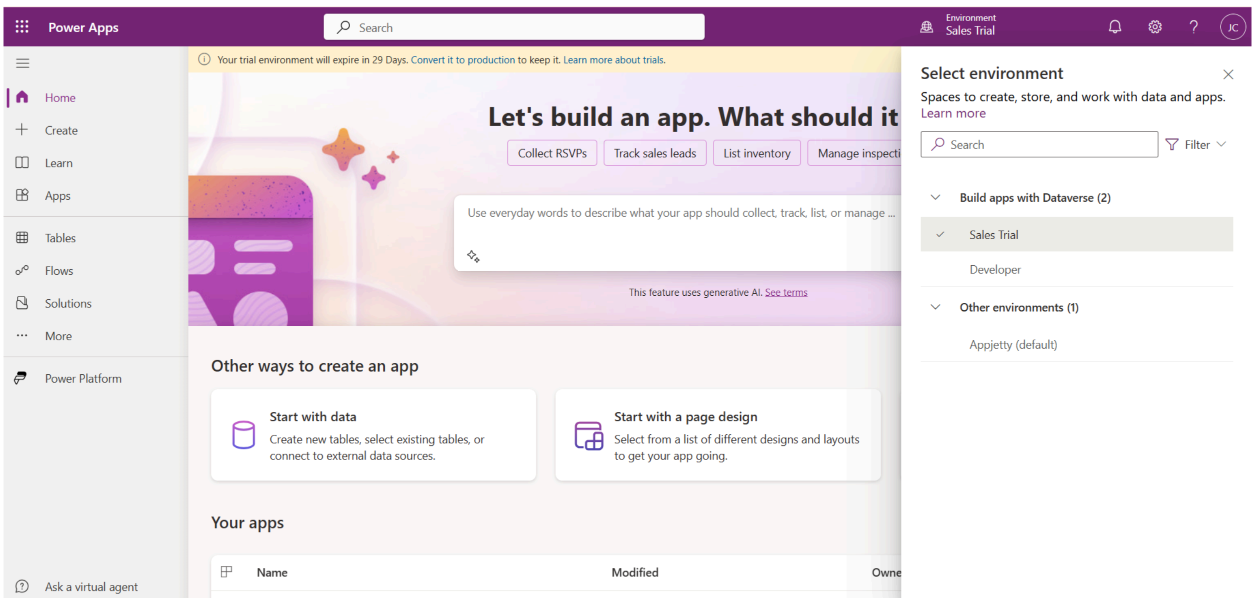
- On purchasing the plugin, you will get a zip file named **"MappyField 365 365.zip"**.

Step 1: Login into your CRM Account and navigate to the https://make.powerapps.com

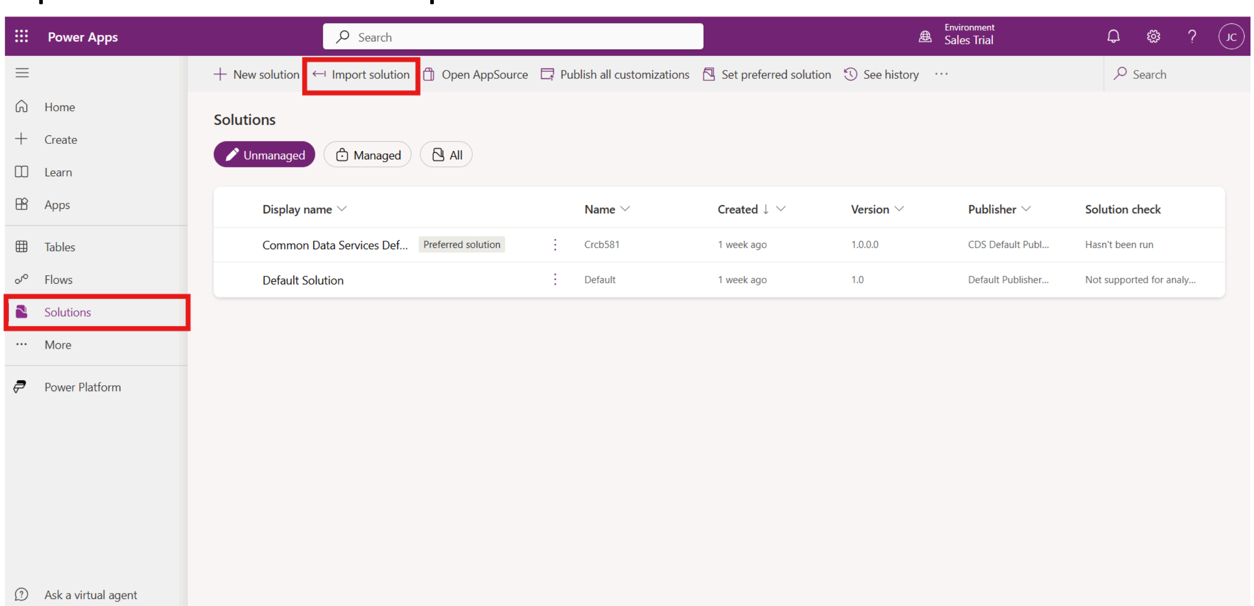
Step 2: Select **Environment.**



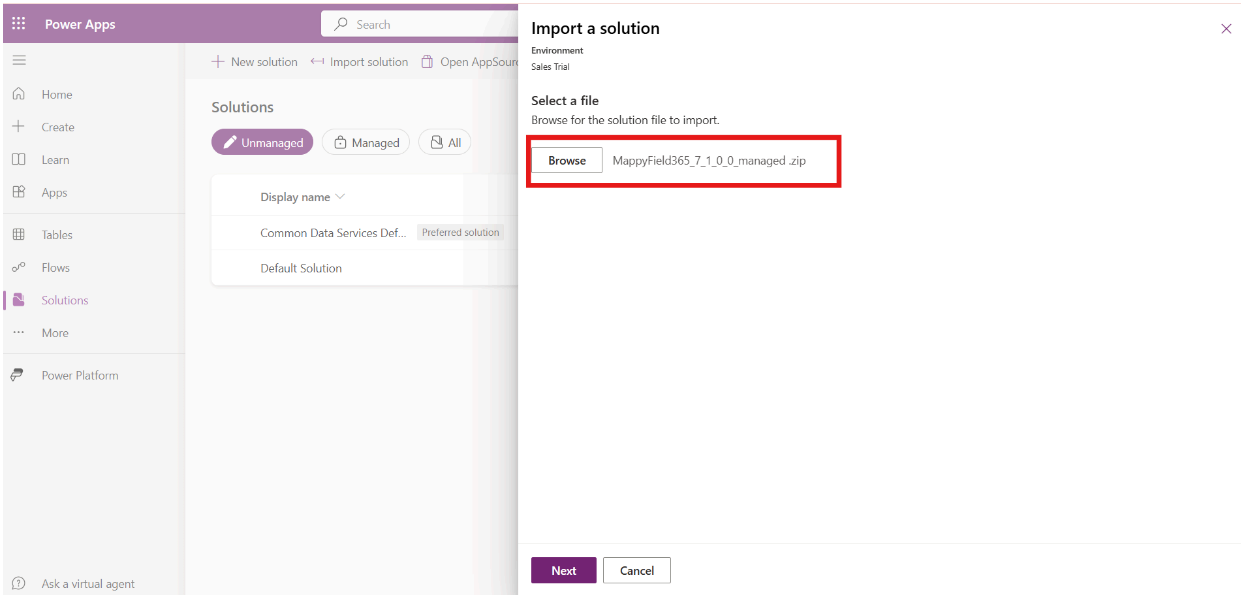
Step 3: Select the environment in which you want to import the MappyField365 package.



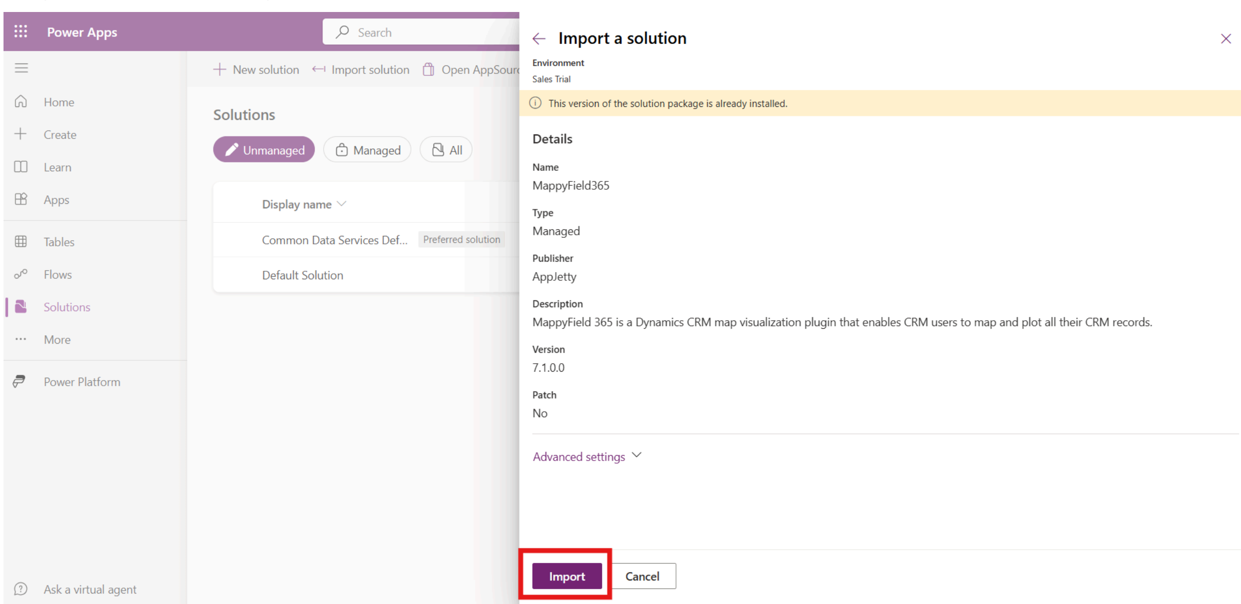
Step 4: Select **Solutions** and click **Import solution**



Step 5 : Upload your **Package Zip** file and click on the **Next** button.

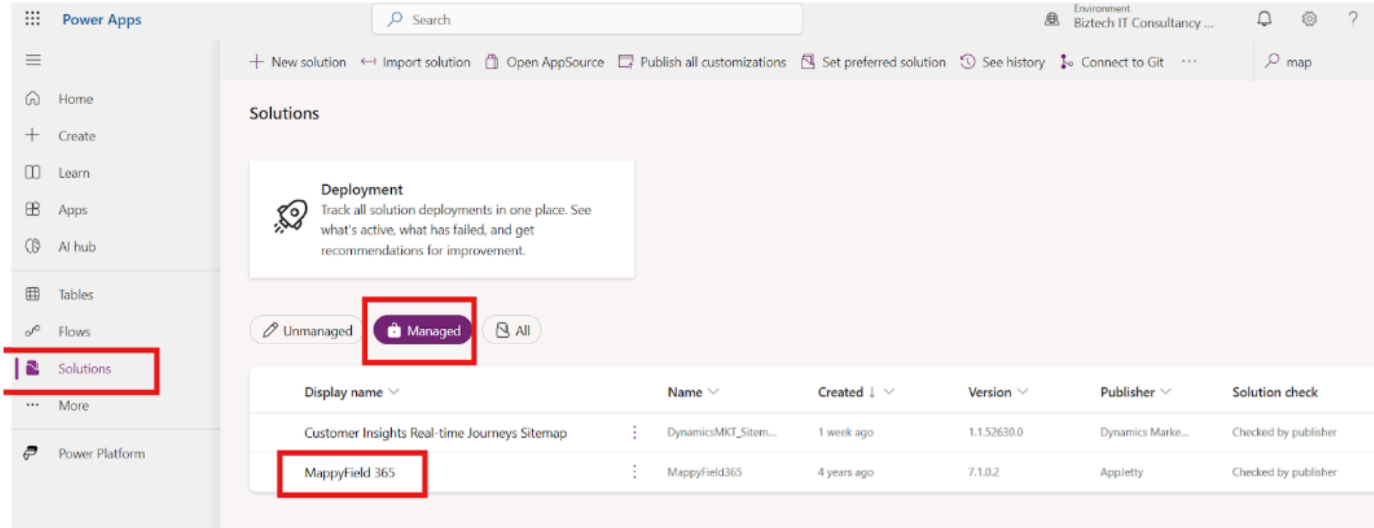


Step 6: Next click **Import**.



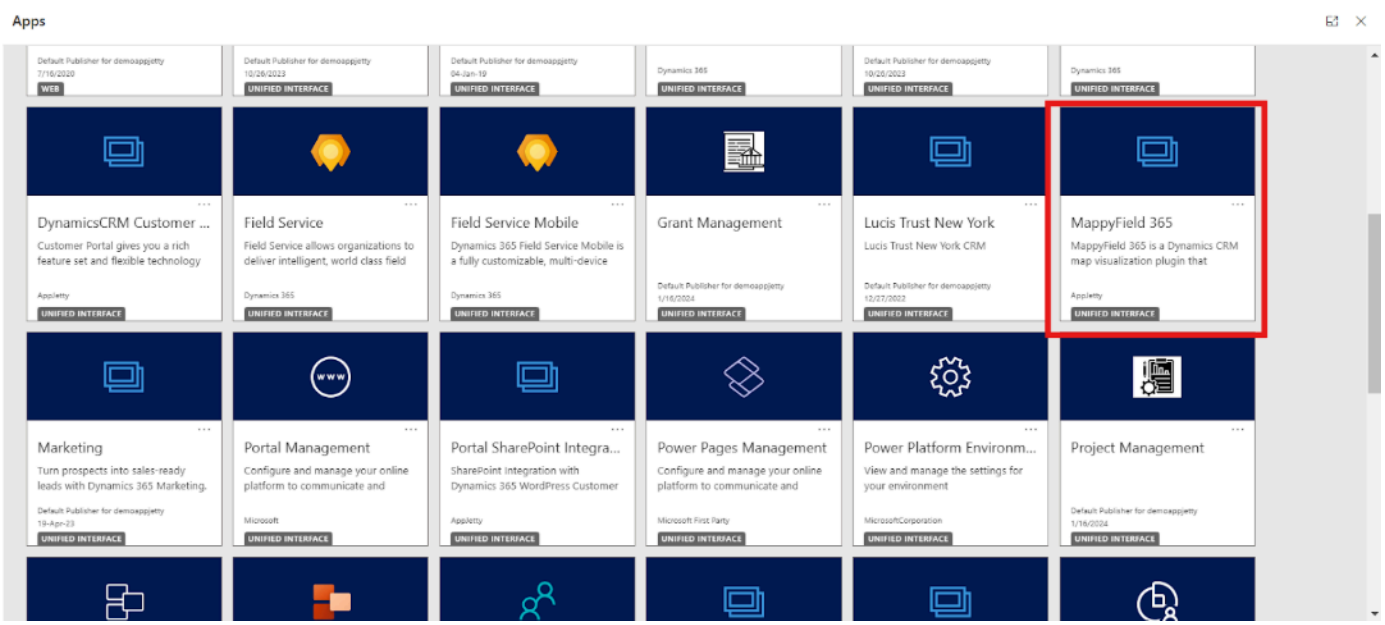
Note: "This version of the package is already installed." This is only a warning message and can be safely ignored.

Step 7: After successfully importing the solution, refresh the calendar first and **Save** the configuration once. Once you import the solution, it will be displayed in the solutions grid view.

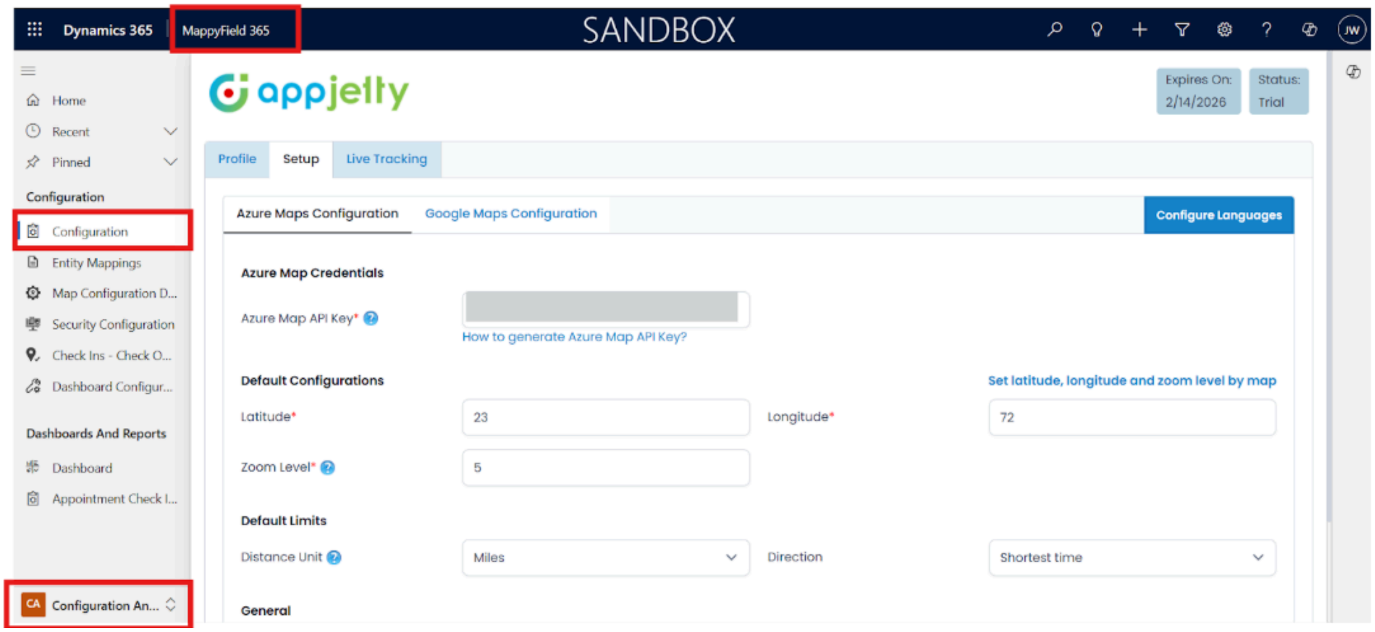


Activate Your Free Trial

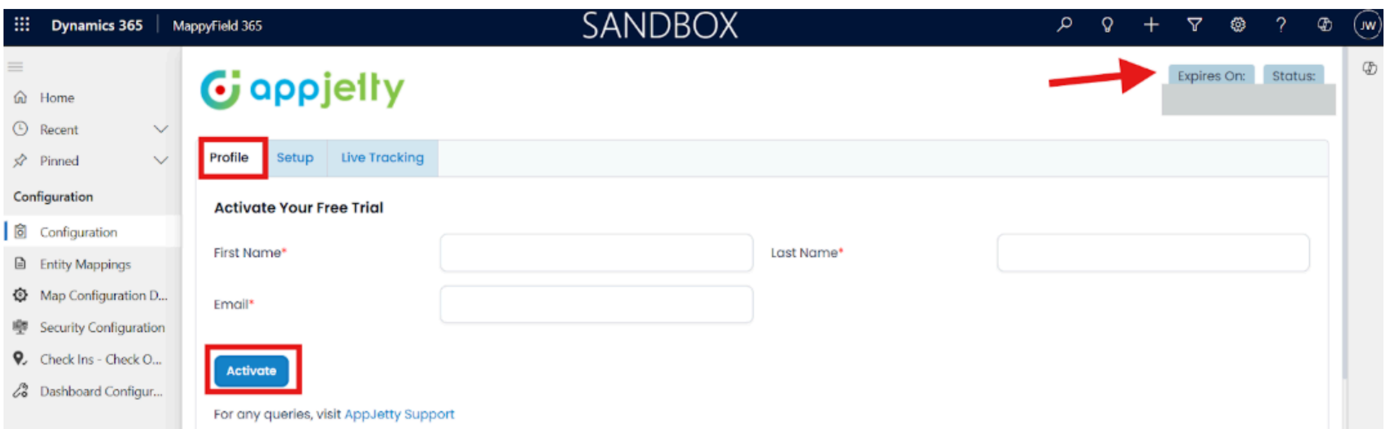
- Open **MappyField 365** app to configure the plugin with your license key.

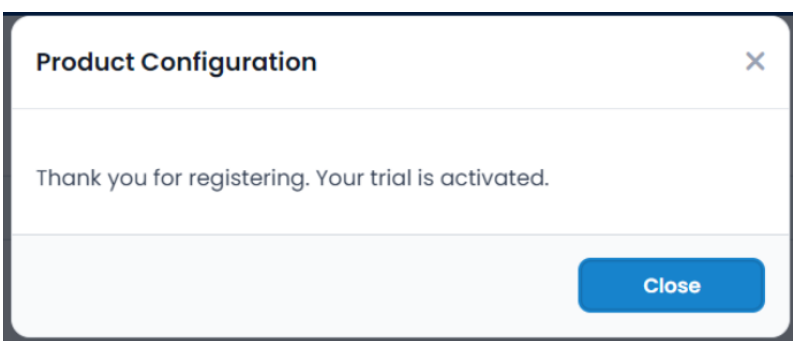


- Go to the **Configuration**



- You can activate your 15 Days free trial. To get a 15 Days free trial license key, fill out the details and click on the **'Activate'** button in the **Profile** tab

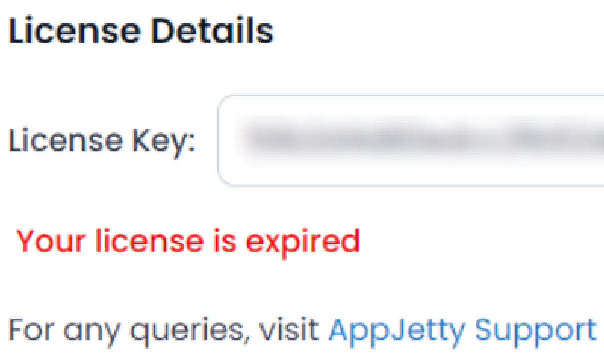




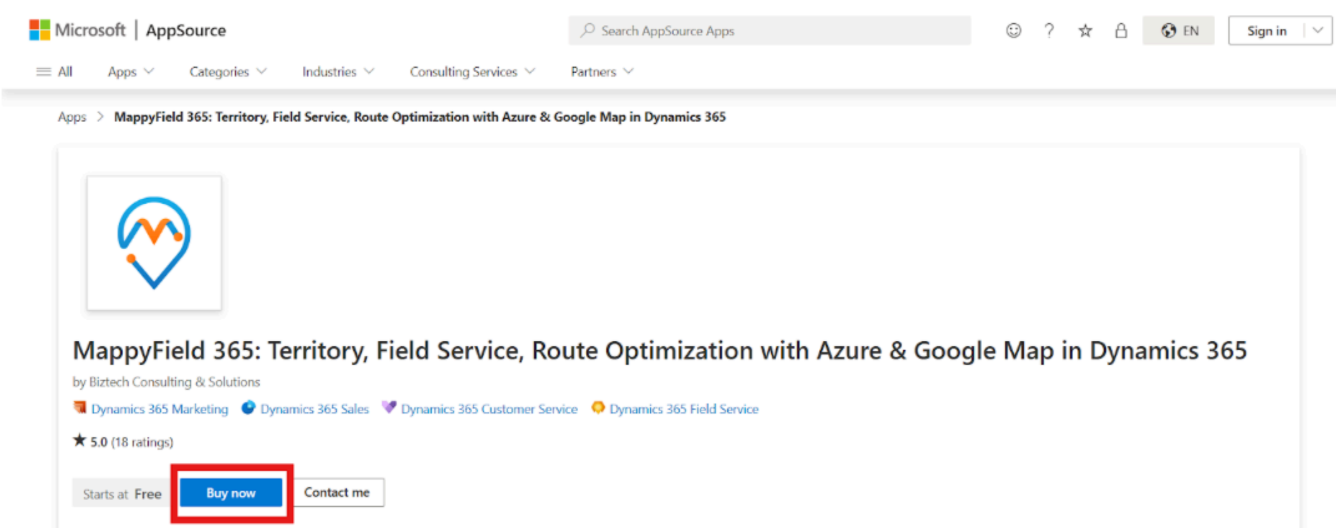
- Your trial will get activated and the expiry date will be displayed on top.

Activation

- On expiration of Trial, a message will appear that the trial has expired. Now to purchase the license, click on the ‘**Buy Now**’ button.



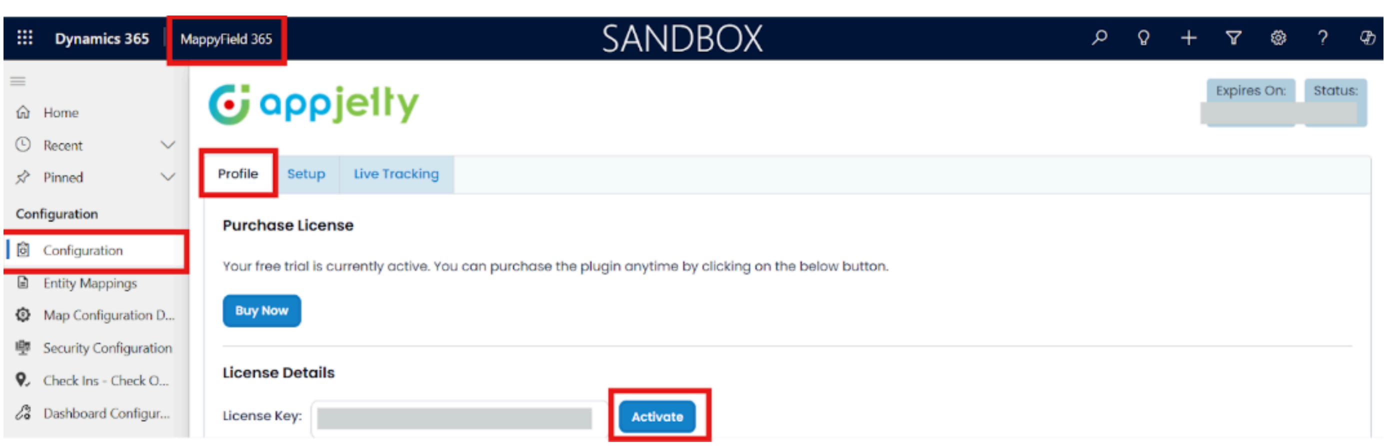
- This will redirect you to our Msappsource page . You can complete the buy now process from the Microsoft AppSource. Here click on **Buy now** and add required details.



- Upon successfully completing your purchase from Microsoft AppSource, please email a copy of your purchase invoice or a screenshot of the payment confirmation to sales@appjetty.com to initiate the key generation process and receive further assistance.

How to update license key

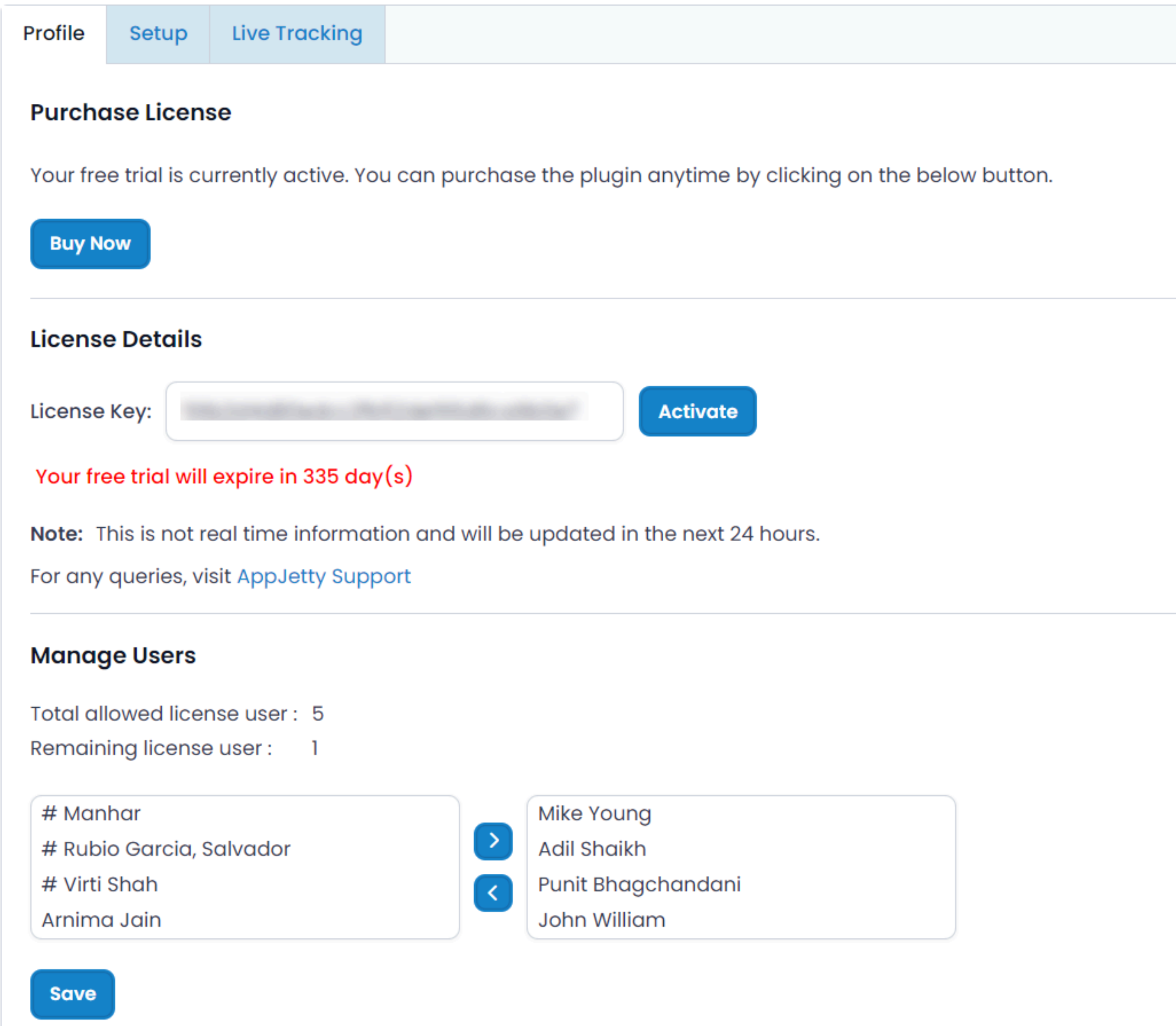
- Open the MappyField 365 app and go to the **Configuration**



- Inside the **Profile** tab, Click on the **Activate** button to update your license.

Insert License Key

- Enter the New License key received in mail. This will enable the **'Activate'** button.
- Click on **'Activate'** button to activate your license.

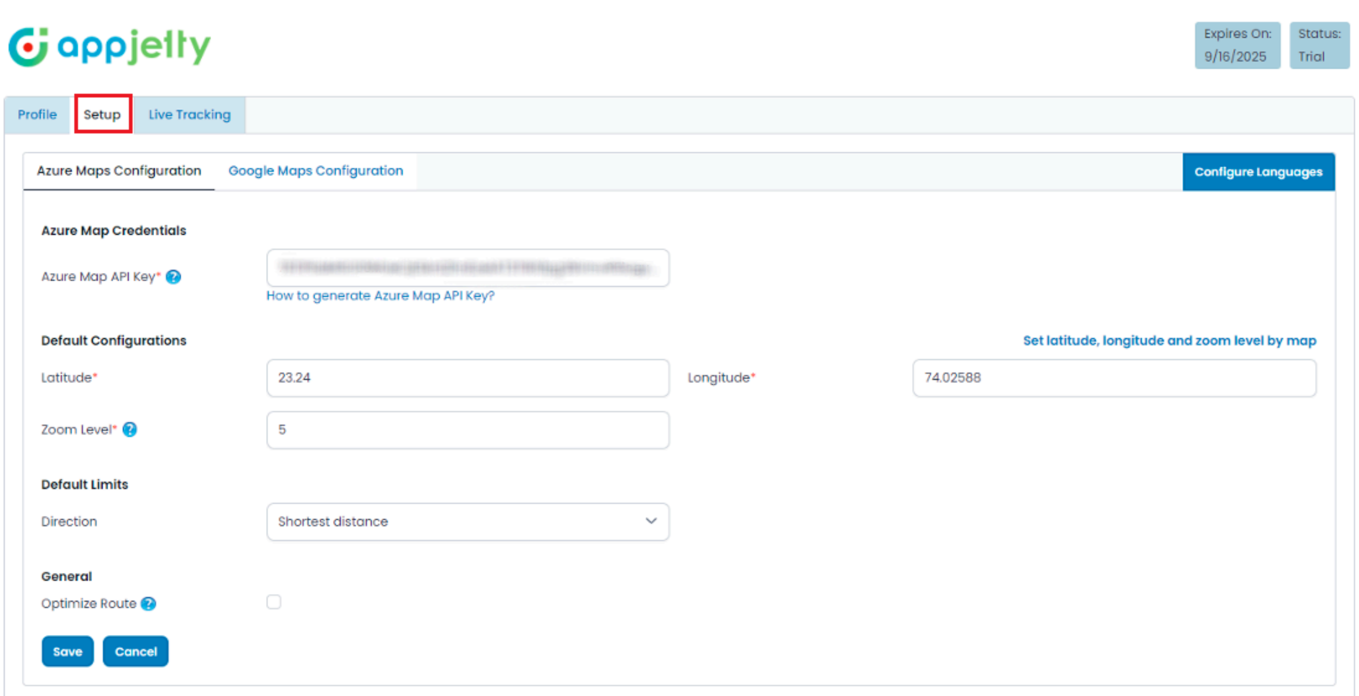


- Default settings under the set up tab can be managed only if a user has **System Administrator Role**, **AppJetty MappyField 365 Admin**. Or else it would show error message stating "You don't have administrative rights. Please contact the administrator."

Setup for Admin

- To manage the default configuration settings of MappyField 365, click on Setup tab and enter default configurations.
- Admin users can set the default view of the Azure, Bing and Google map by configuring from here.

Azure Maps Configuration

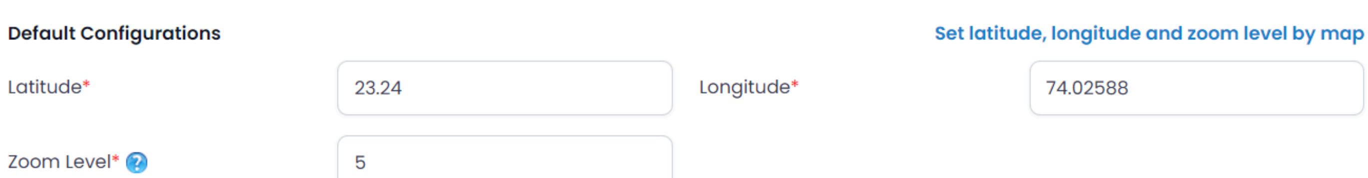


- **Azure Map API Key**: Enter Azure map API key which you have generated from.

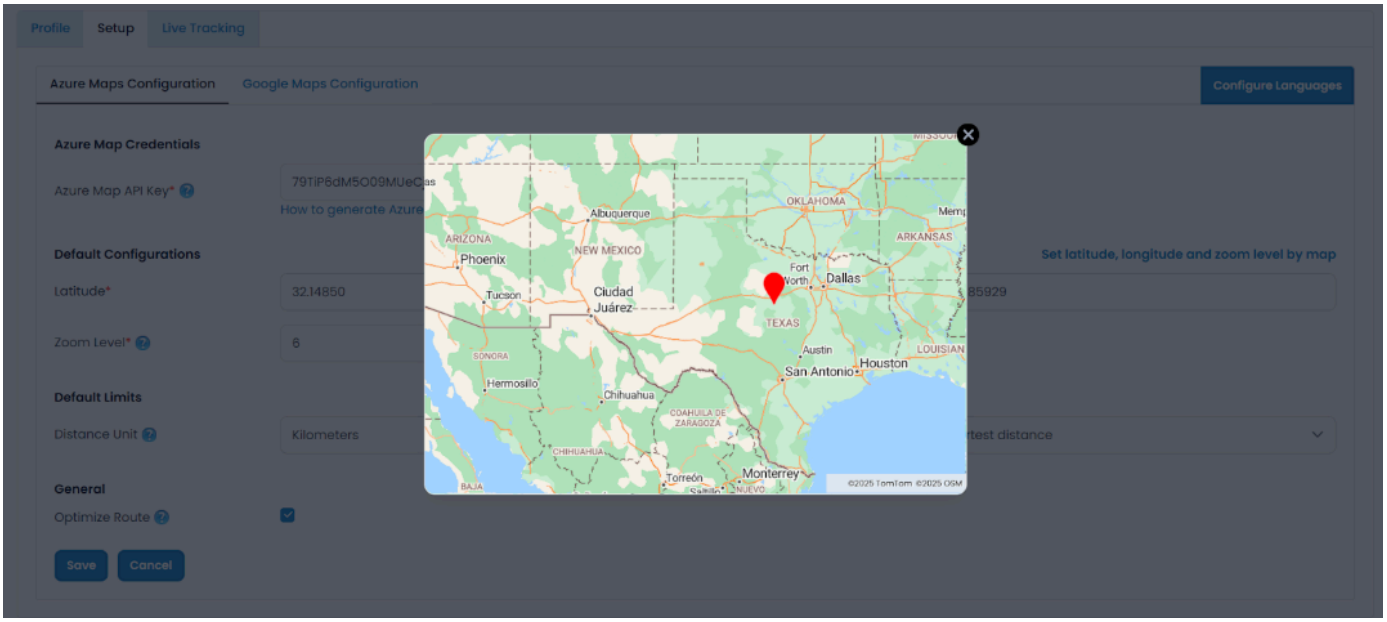
Note: To assist you further, you will find a link beneath the text box that states **How to generate Azure Map API Key**.

Default Configurations

- Under the "Default Configuration" option, set the default **Latitude**, **Longitude** and **Zoom** level for the map when it is opened for the first time.
- You can set the default location using the map as well by clicking on "**Set latitude, longitude and zoom level on map"** option available on the right-hand corner.

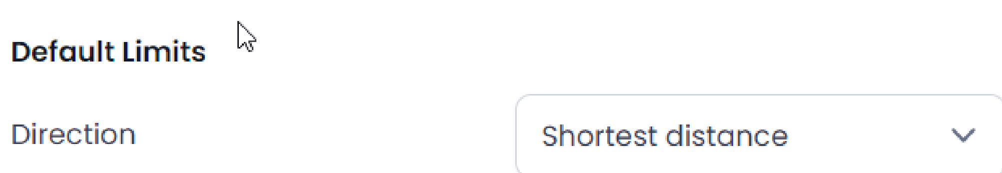


- By clicking on it, the map will open in new window. You can set the location by moving the icon as shown in below screenshot.

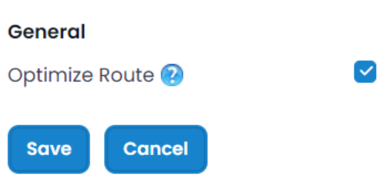


Default Limits

- Set “Default Limits” for distance unit and direction.
  - **Distance Unit**: Select to measure the distance in ‘Kilometers’ *or* ‘Miles’.
  - **Direction**: Select the direction as per either ‘Shortest Time’ *or* ‘Shortest Distance’.



General



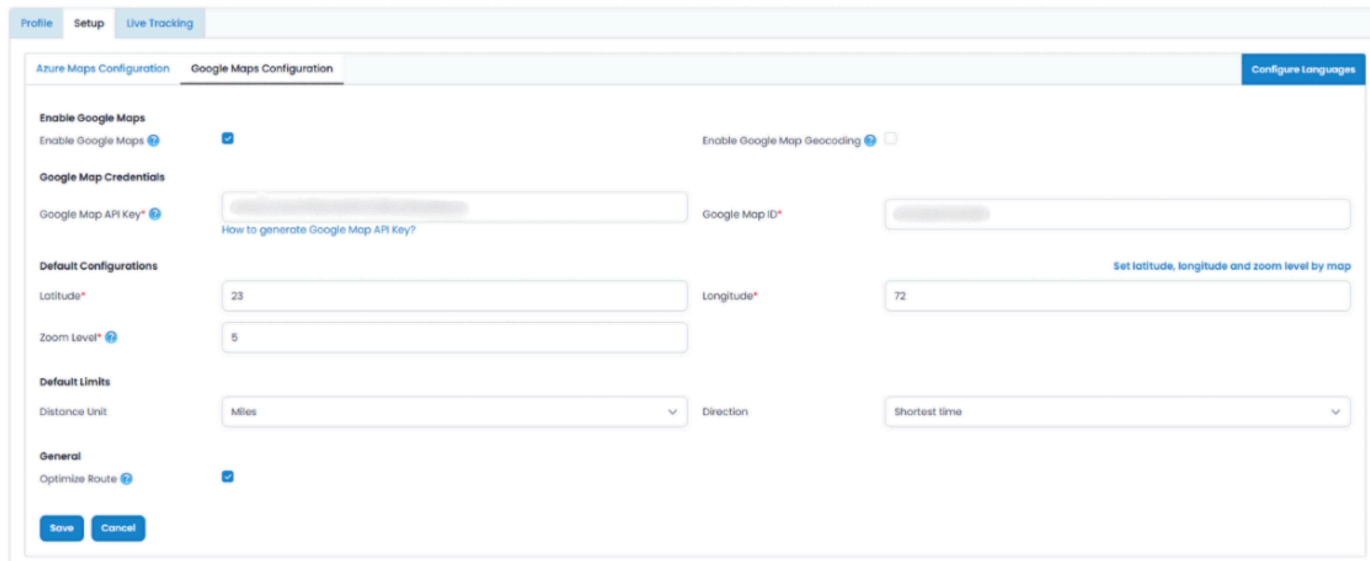
- **Optimize Route**: By enabling this option, the users will get the Routes based on the SPF algorithm.
- Click on the Save button to save the settings.

Google Maps Configuration

Enable Google Maps: Checkmark the box to enable the Google Maps in the MappyField 365

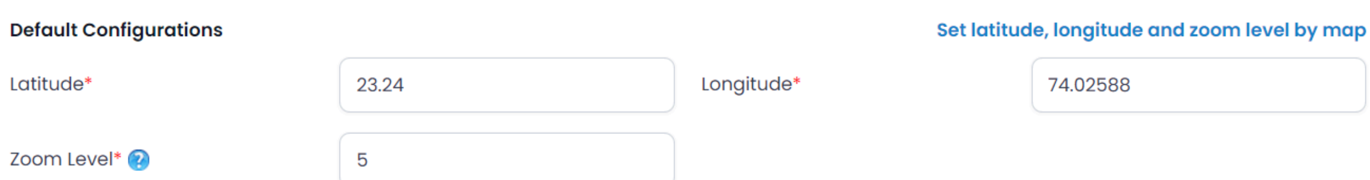
Google Map API Key: Enter the Google Map API key which you have generated.

<u>**Note**</u>: To assist you further, you will find a link beneath the text box that states How to generate Google Map API Key.

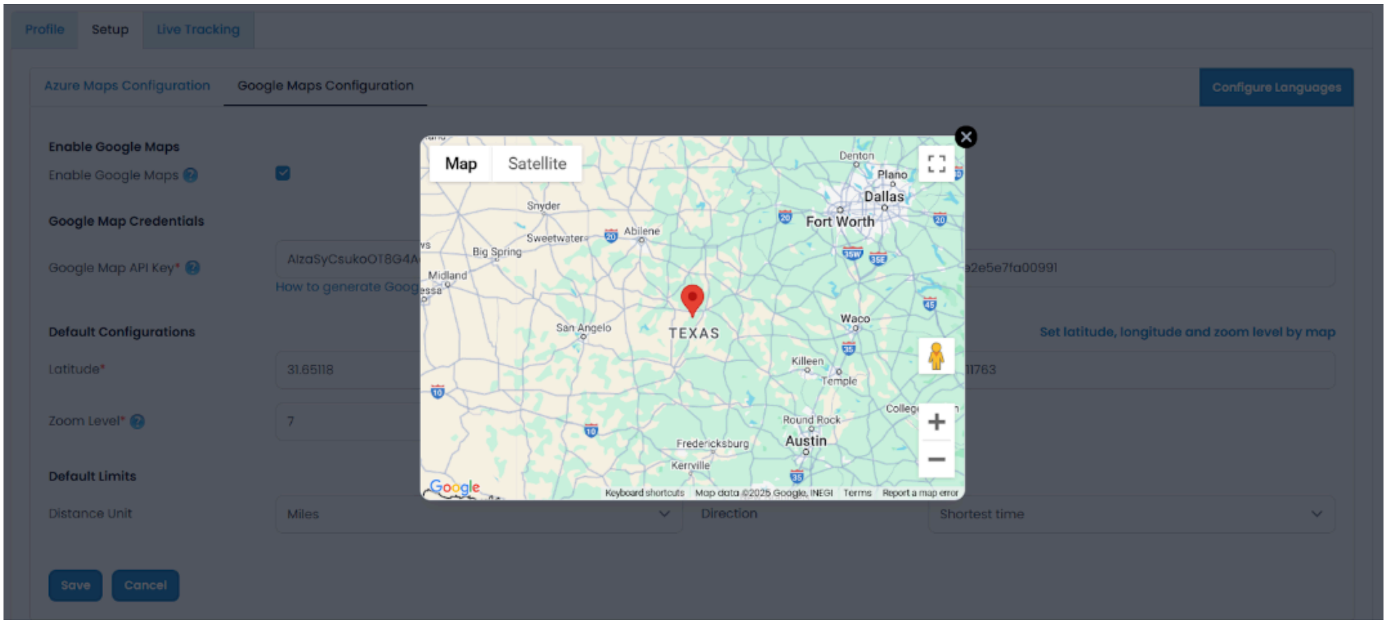


Default Configurations

- **Enable Google Map Geocoding**: Checkmark the box to enable the Google Maps Geocoding in MappyField 365.
- Under "Default Configuration" option, set default **Latitude**, **Longitude** and **Zoom level** for map when it is opened for the first time.
- You can set the default location using the map as well by clicking on "**Set latitude**, **longitude** and **zoom level on map**" option available on the right-hand corner.

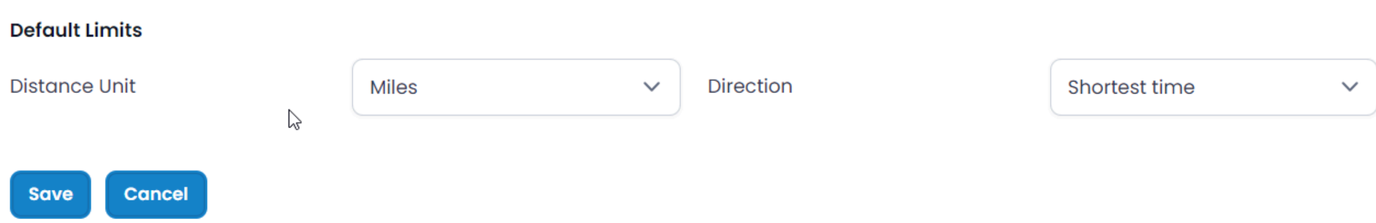


- By clicking on it, the map will open in new window. You can set the location by moving the icon as shown in below screenshot.



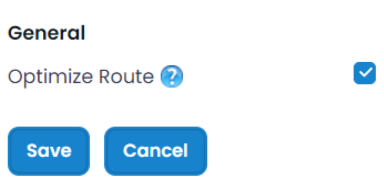
Default Limits

- Set “Default Limits” for distance unit and direction.
    - **Distance Unit**: Select to measure the distance in ‘Kilometers’ or ‘Miles’.
    - **Direction**: Select the direction as per either ‘Shortest Time’ or ‘Shortest Distance’.



- Click on the Save button to save the settings.

General



- **Optimize Route**: By enabling this option, the users will get the Routes based on the SPF algorithm.
- Click on the Save button to save the settings.

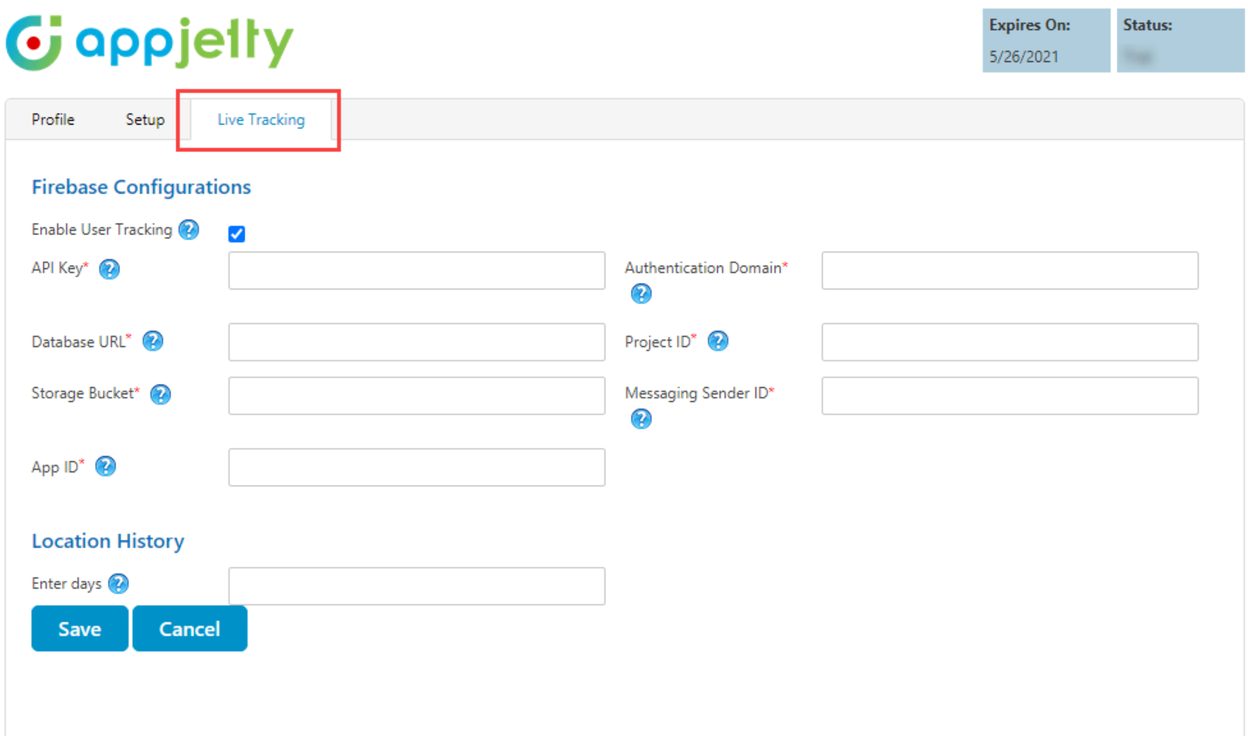
Live Tracking

- You or a DynamicsCRM users can enable/disable the **Live User tracking** feature from configuration to track the CRM users (team members).

- You need to configure Firebase details for User's Live Tracking in MappyField 365:

  > API Key > Database URL > Storage Bucket > APP ID

  > Authentication Domain > Project ID > Messaging Sender ID > Location History



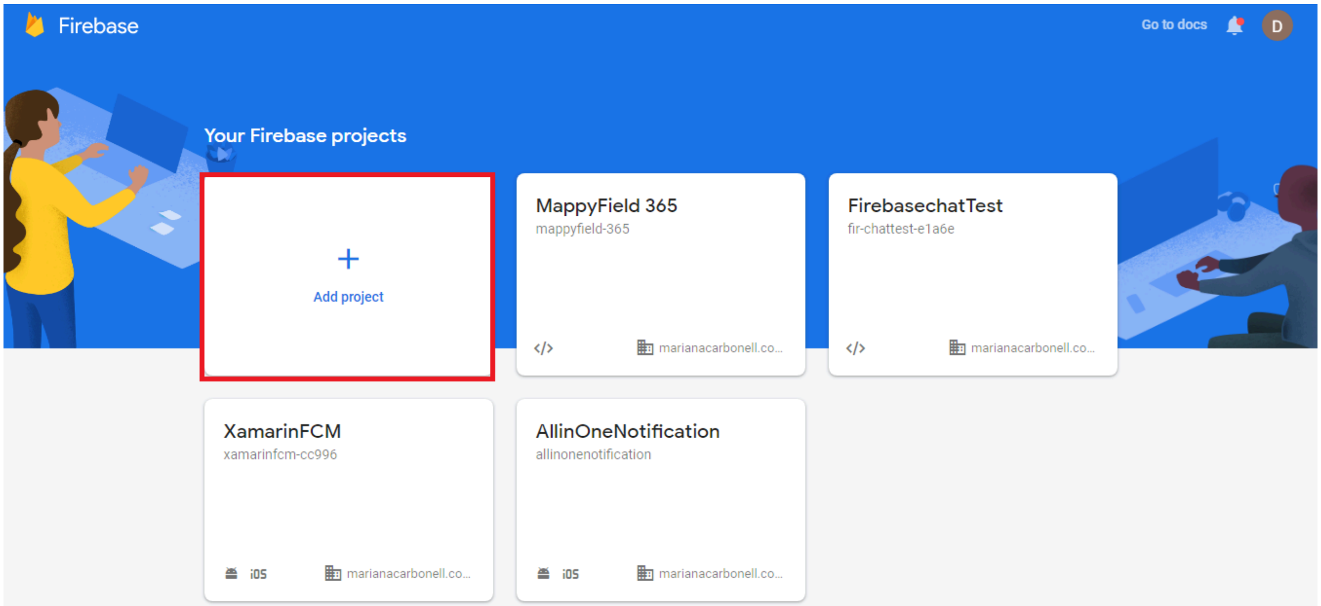
  - **Enter days**: Enter days for which you want to get the history of the selected user's activity.

- After inserting the 'Firebase' configuration details for Live Tracking, click on the Save button.

Note: Firebase configuration is required to enable user tracking in MappyField 365. You need to register the project with the Firebase.

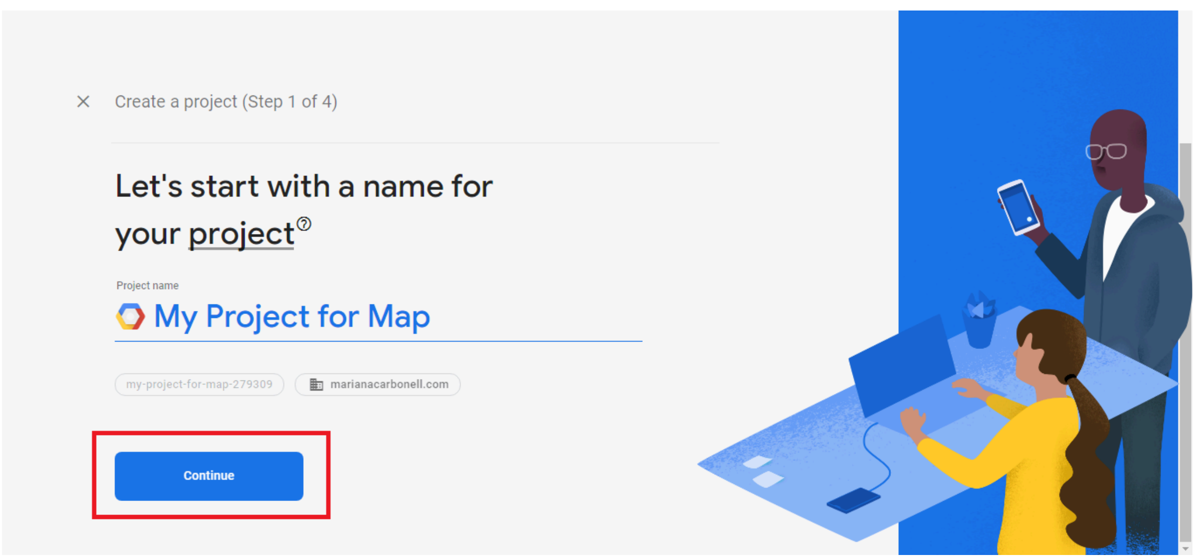
How to configure the Firebase?

- We must configure the **Firebase** for "Live tracking". Follow the below steps:
  - Go the Firebase website, open this link: https://console.firebase.google.com/

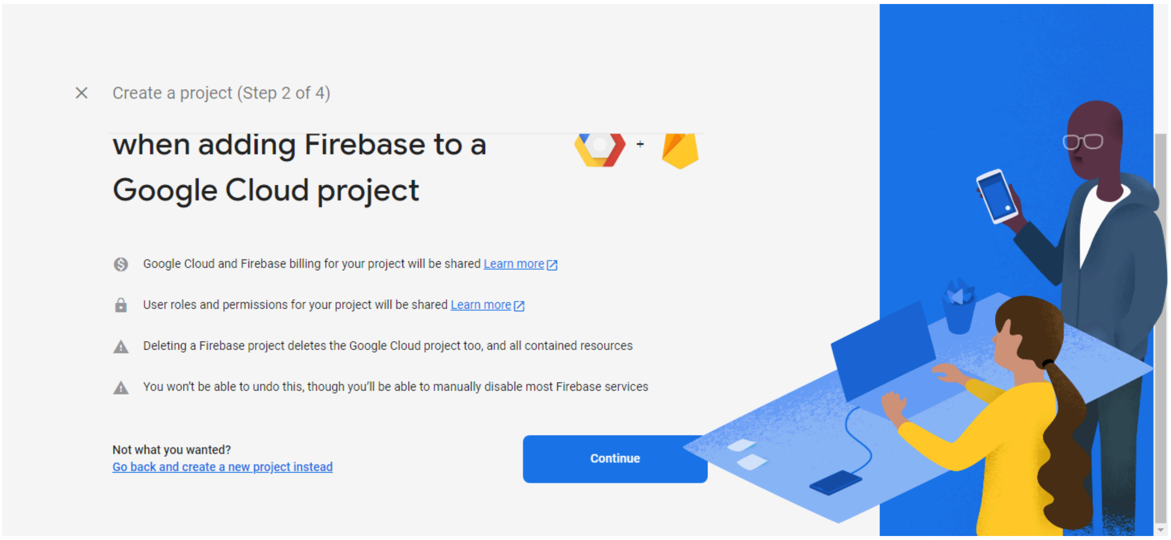


- Here you need to add a new project by clicking on the **+ Add project**.

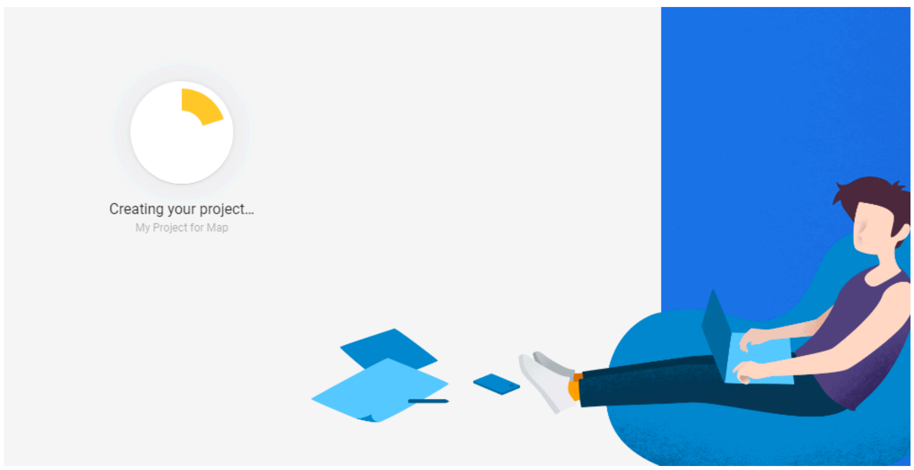
- Give a suitable name to your project and click on Continue to configure the details.

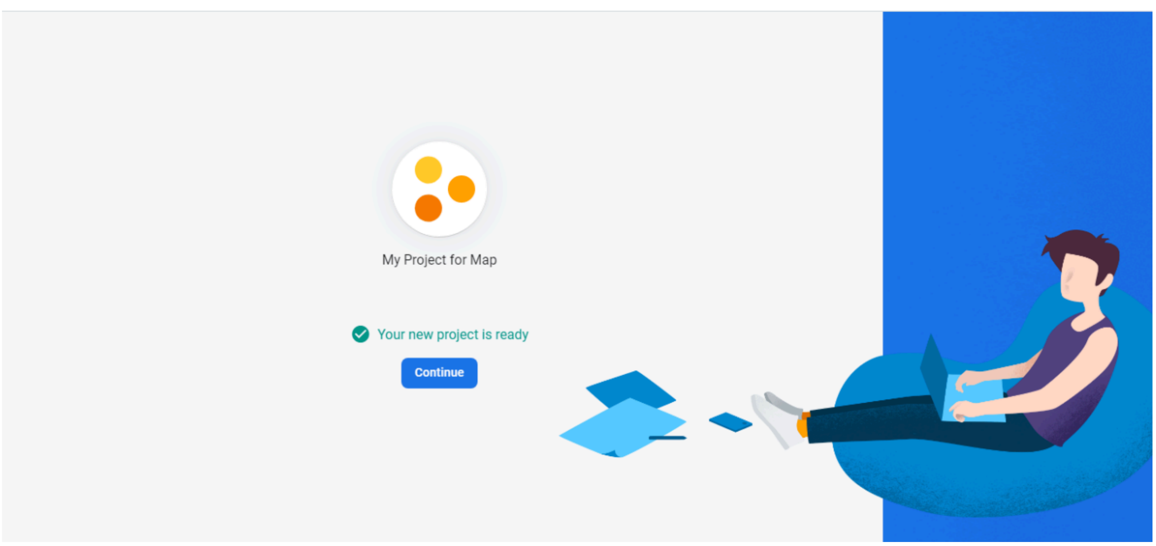


- In next, you will find the **"Add Firebase"**, click on that.

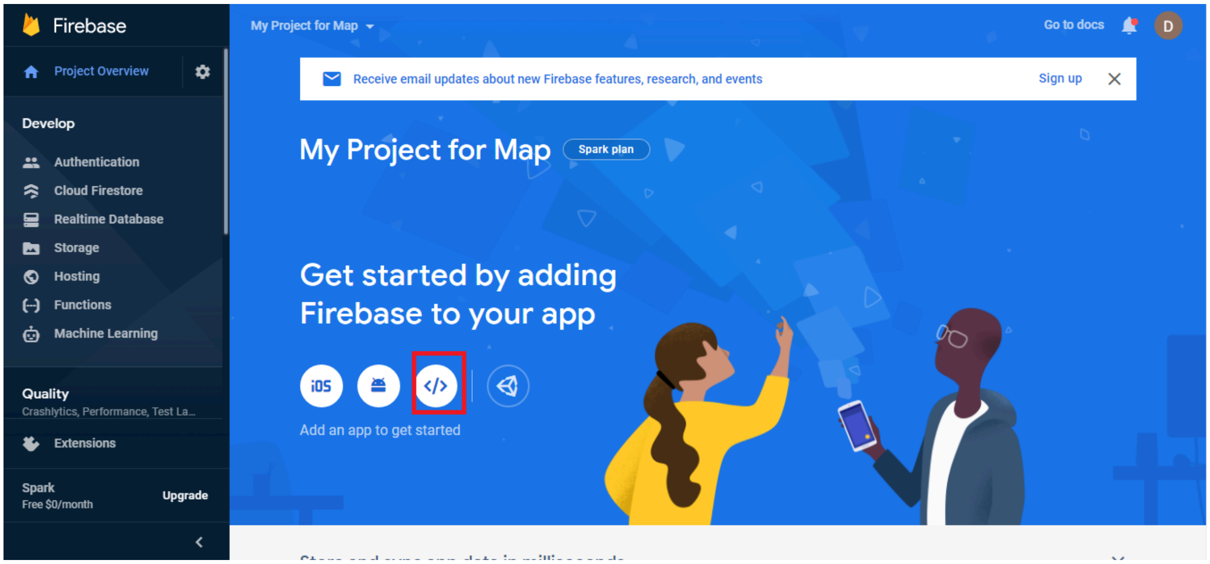


- By click on that, the project will be created.

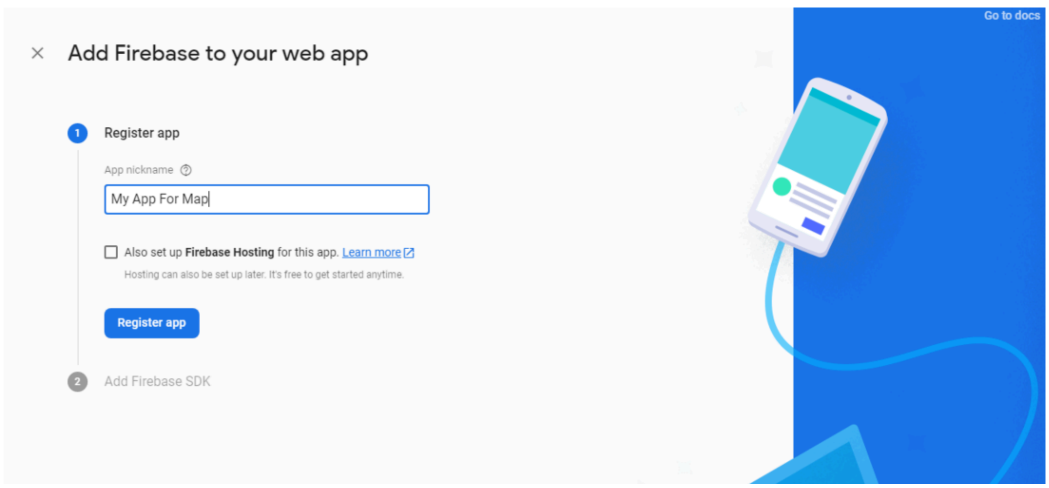




- Click on **Continue** for next details.
- Click on **</>** icon.



○ Now register the app by inserting the relevant name to web app.



o After registration the web app, you will get the script which you have to copy the code and you must enter in MappyField 365 configuration for live tracking.

○ Click on Continue to console.

- In this way, by configuring the Firebase and inserting the Firebase details into the MappyField 365 configuration, you can enable the Live User tracking feature.

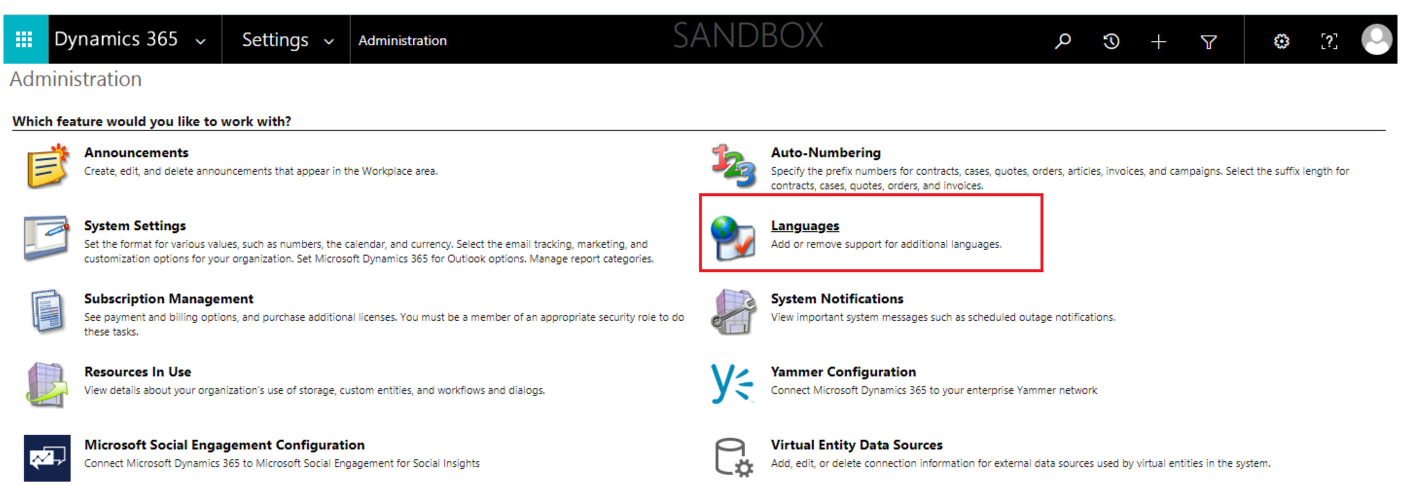
Configure Languages

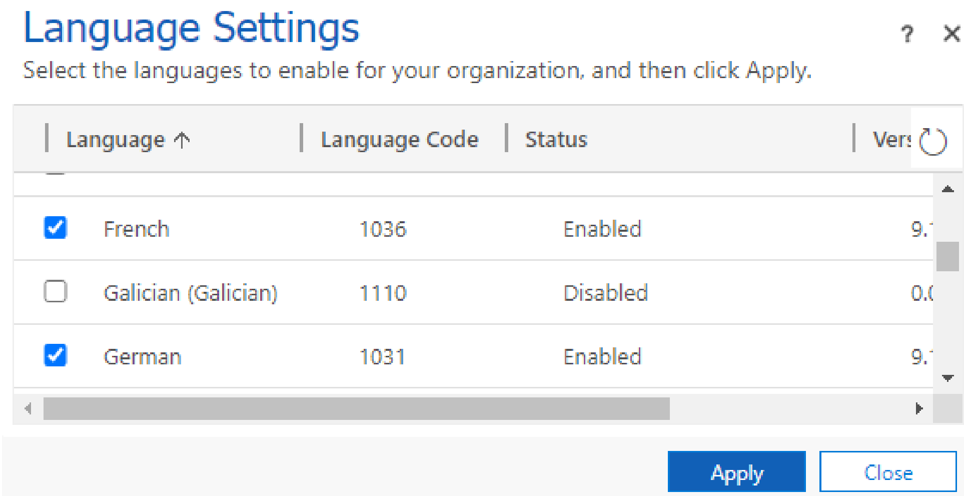
- You can also configure language of your choice by clicking on **Configure Languages** button available on Setup page.

- Select the language from dropdown that you wish to configure your messages.
- Here, you need to add translations for the messages in the language of your choice.
- Click on **Save** button to save the language translations.

Note: To configure languages, user first needs to manage language settings from CRM. Languages that are selected in CRM can be listed for the MappyField 365.

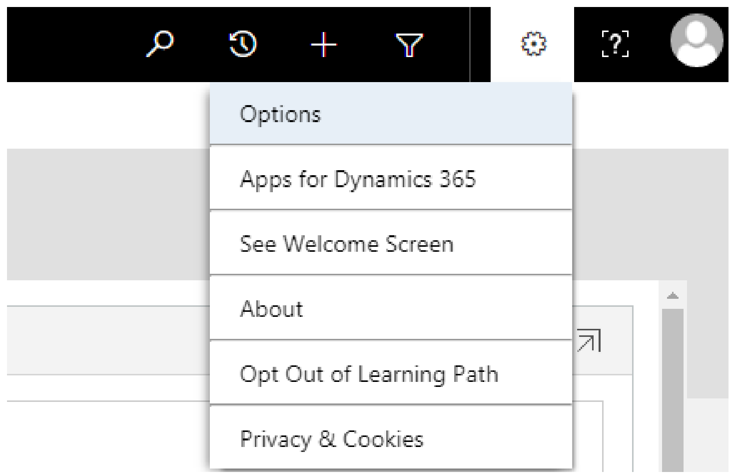
- Go to **Settings** **Administration** **Languages** to enable/disable the languages.



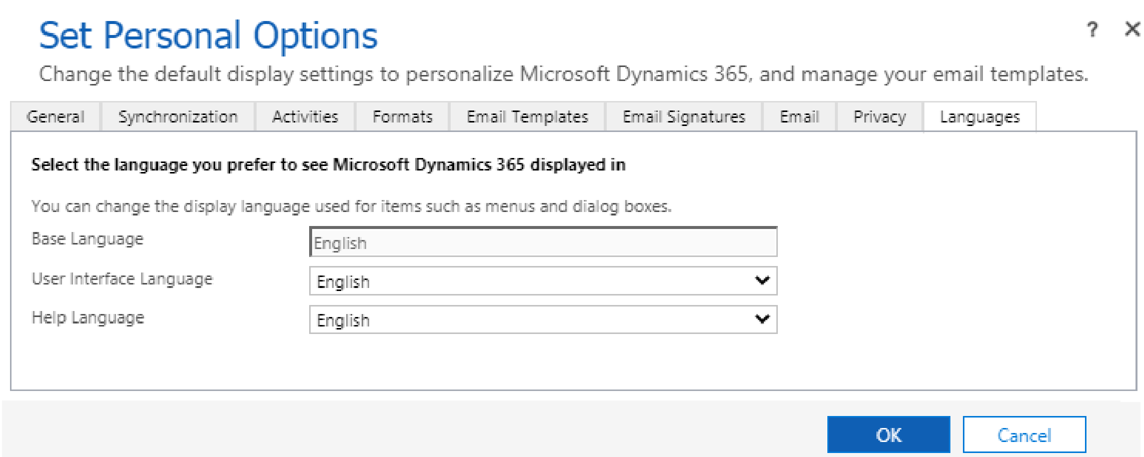


- You can enable or disable multiple languages from the list. After settings the language, click on the **Apply** button. This allows you to change languages in Microsoft Dynamics 365.

Click on the **Settings gear** icon at the top right of the screen, choose Options to open the Set Personal Options window.



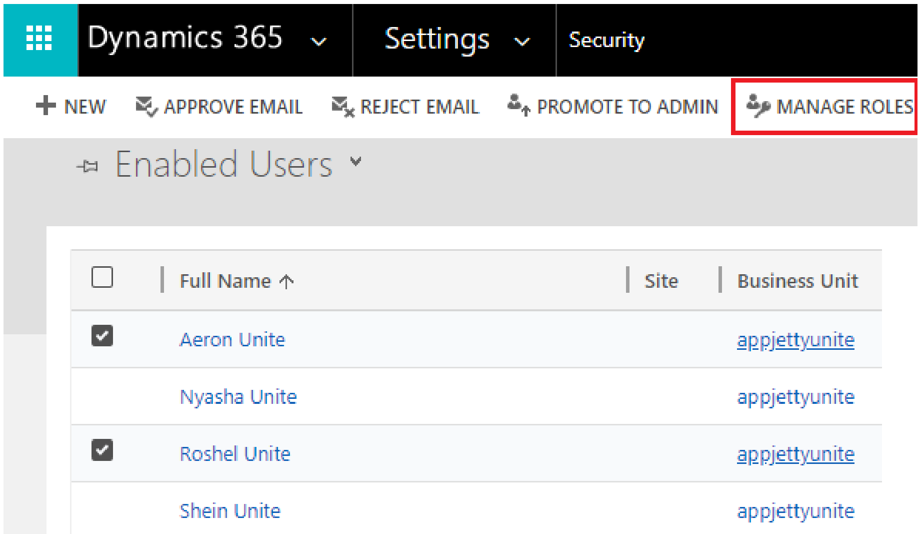
- Go to the **Languages** tab, select your user interface language, then click **OK**.



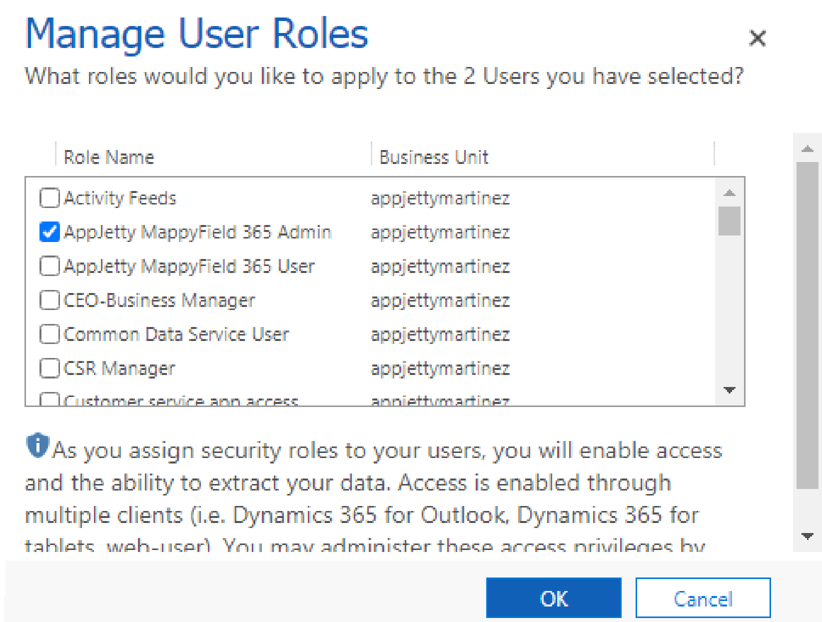
- Once you select the language here, that language will enable in the 'Configure Language' of MappyField 365 Setup.

Assign User Role

- To manage the user roles, navigate to **Settings -> Security -> Users.**



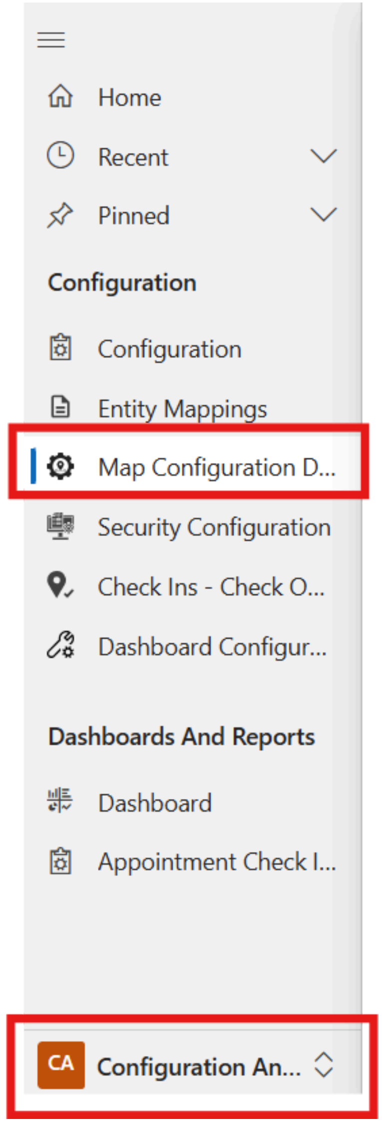
- Now select the users whose roles are to be managed and click on **'MANAGE ROLES.'**
- This will open a pop up to select roles.



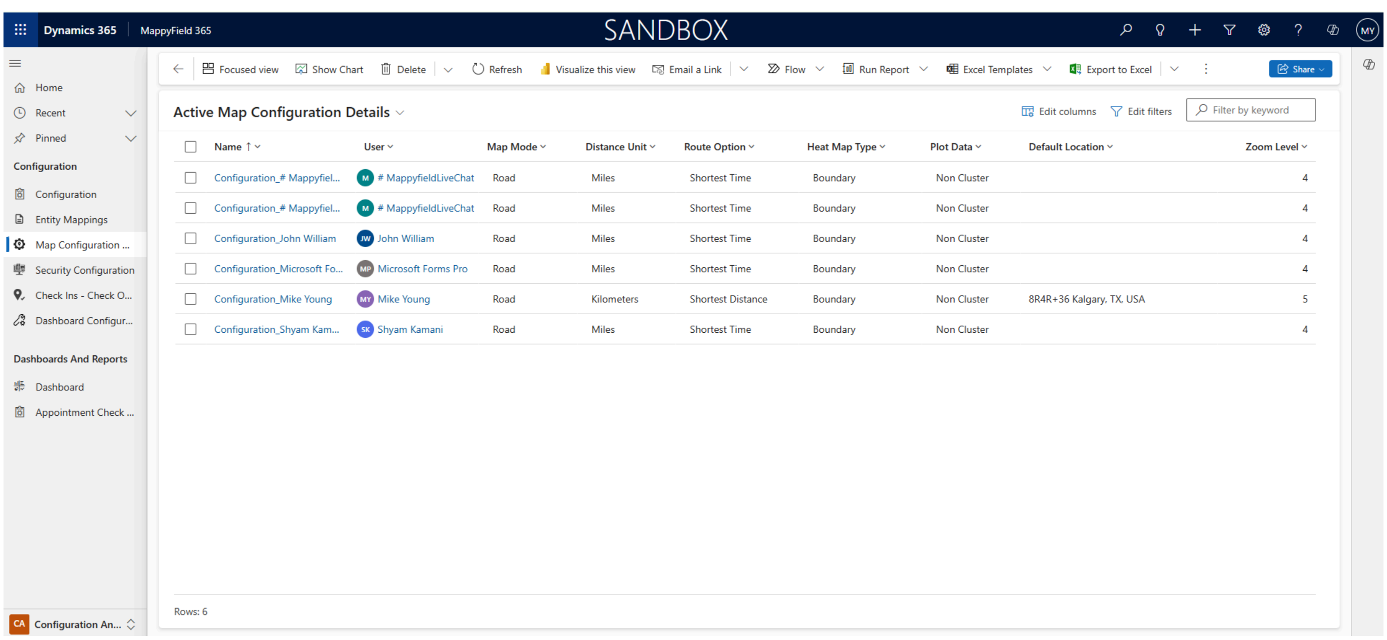
- The available roles for selection are **AppJetty MappyField 365 Admin** *or* **AppJetty MappyField 365 User** role.
- User with AppJetty MappyField 365 **Admin role** can perform all the actions like **System administrator** while user with AppJetty MappyField 365 User role can do all actions except **delete actions**.

User Wise Map Configuration

- On assignment of any role like AppJetty MappyField 365 Admin, AppJetty MappyField 365 User or System Administrator role, configuration settings record must be created. This can be accessed by navigating to **Map Configuration**.

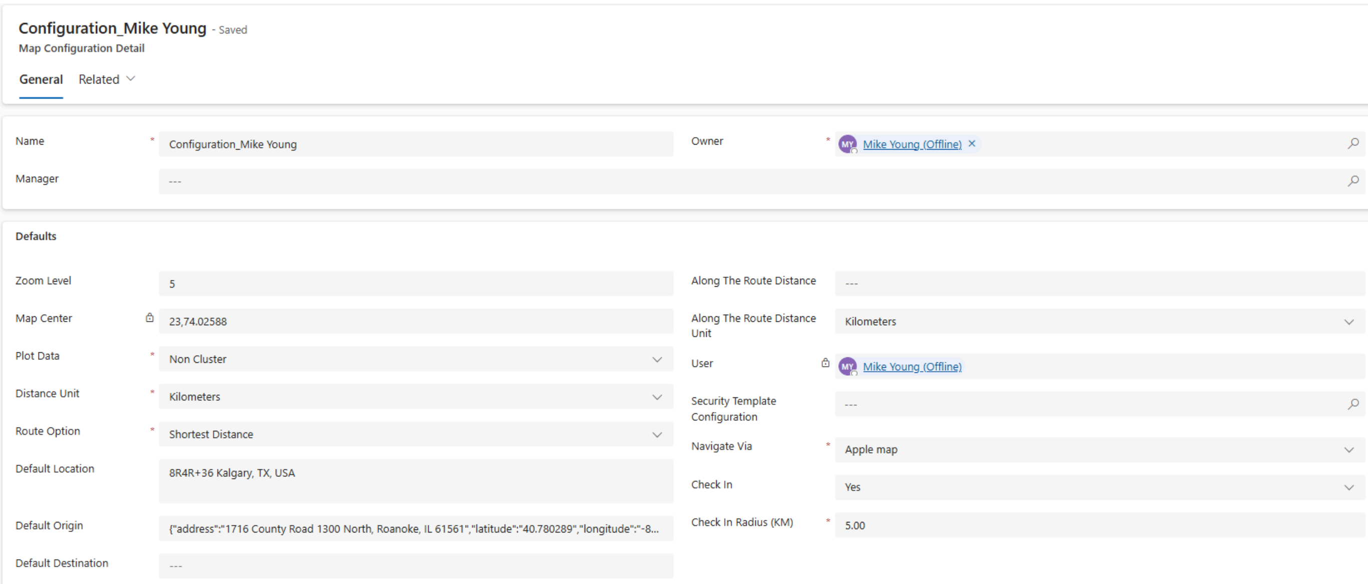


- On navigating to **MappyField 365 Configuration**, it would show list of all the users with MappyField 365 role or System Administrator.



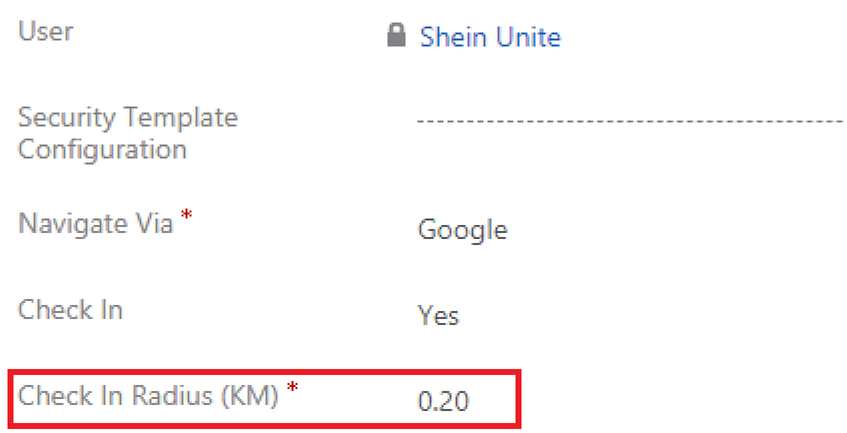
__Note__: These configurations are default user-based configurations that will be set as default when map is loaded.

- Following are the configurations:
  - **Manager**: Define manager who can validate check in/out data.
  - **Zoom Level**: User can set default zoom level for the map. It can also be managed based on settings made from the contextual menu.
  - **Map Center**: User can set default map center.
  - **Plot Data**: Default plotting of data can be defined. Either it can be in cluster or non-cluster format.



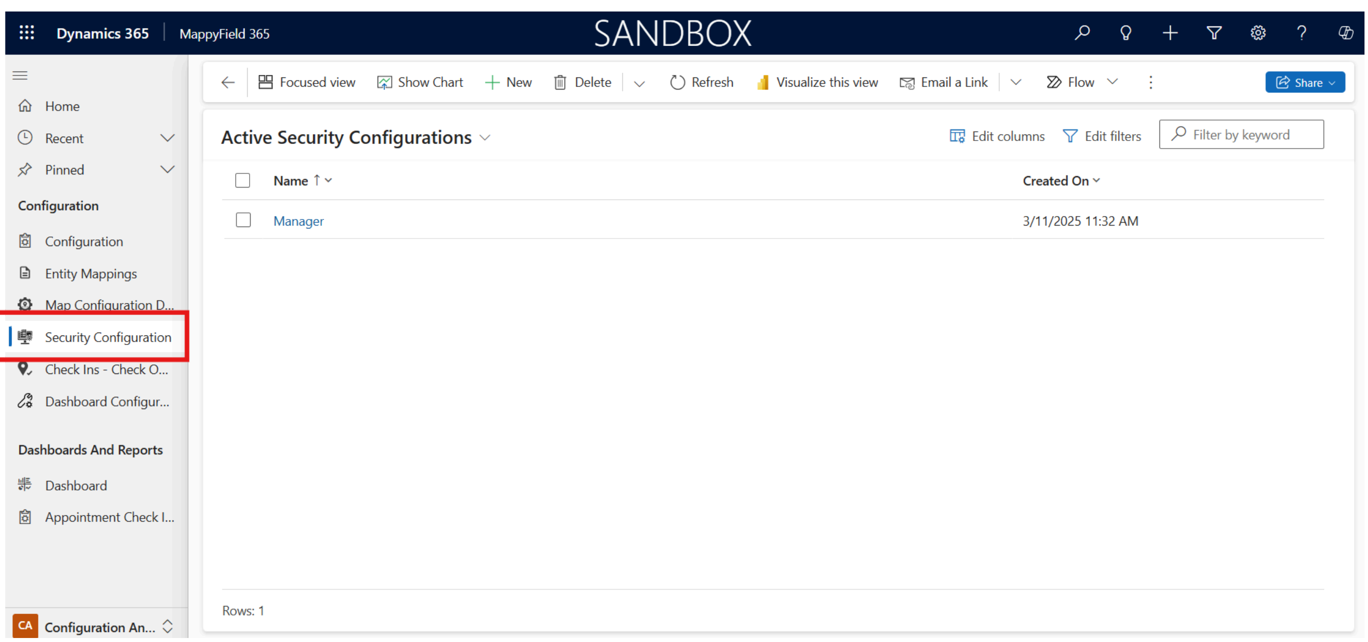
  - **Distance Unit**: Default option for distance measuring. Either miles or kilometers.
  - **Route Options**: You can define best way to determine route from this feature.
  - **Default Location**: The user can define the default location using this option.
  - **Default Origin**: The user can define the default origin using this option. It can also be managed based on settings made from the contextual menu.
  - **Default Destination**: The user can define the default destination using this option. It can also be managed based on settings made from the contextual menu.
  - **Along the route distance**: Define radius of along the route search.
  - **Along the route distance unit**: Define default unit for along the route search.
  - **Security Template Configuration**: Define the default 'Security Template' for the user if required.
    Note: Here the list of the Templates will appear as per the **Security Template Configurations**.
  - **Navigate via**: Select navigate to check the routes by using Google Maps, Waze Map *or* Apple Map.
  - **Check In**: Enable or disable the 'Check In' module. If you enable the **Check In**, **Check In Radius (KM)**, the option will get enabled.

- **Check in Radius**: Define Geo Radius that can be allowed to perform any check in.



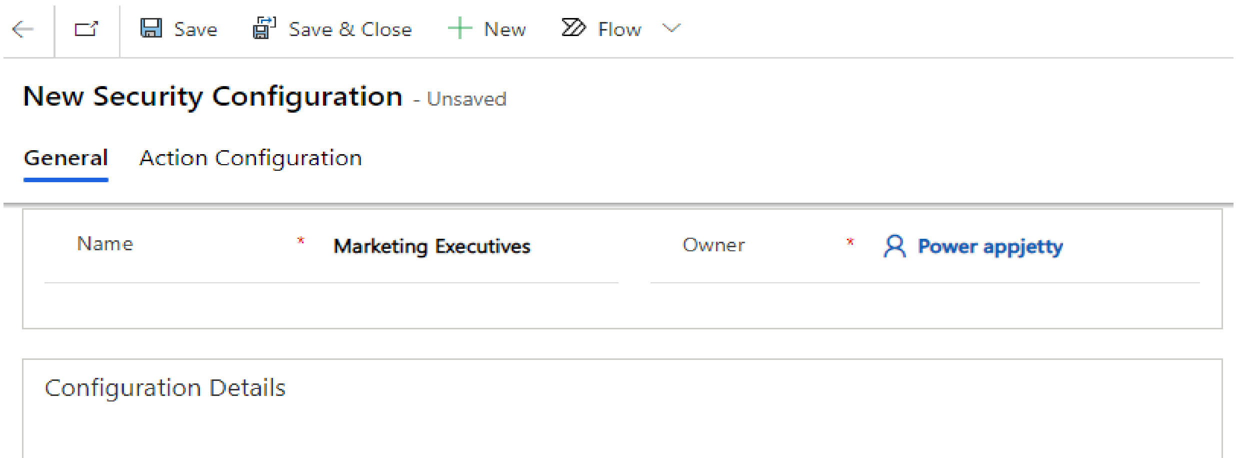
Security Template Configuration

- The only **System administrator** *or* **User** with **AppJetty MappyField 365 Admin role** can create Security Template for other CRM users with AppJetty MappyField 365 User role. User admin can assign selected actions to different users using security templates for the different CRM users i.e. Sales Reps, Service Executive, Field Reps, etc.
- From the MappyField 365 navigation panel, you will see the **Security Configuration** to give the accessibility of the map and functionalities.
- By clicking on the "Security Configurations", you will be redirected to the "Active Security Configurations" where you can add the new security template for the CRM users.



- With admin rights, you can add a new "Security Template" by clicking on the "**+ New**" button from the action ribbon or you can edit the existing template if any changes/modifications are required.

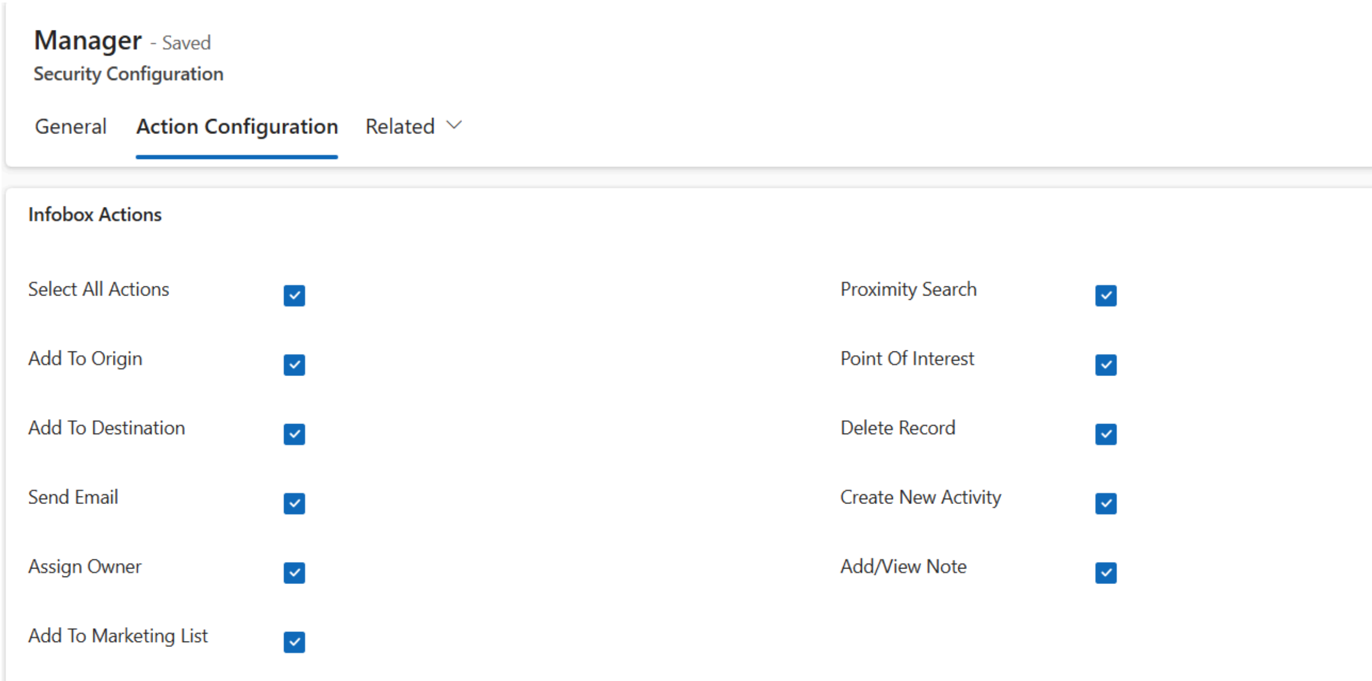
- If you have admin rights, you can add a new security template. You need to insert the "Name" and change the "Owner". You can save the template or navigate to the "Action Configuration".



- Once the security template is created and configured, you can select it from the “Map Configuration Detail”. So, that configuration detail of the map will be displayed in the “Configuration Details” option.
- By navigating to the Action Configuration, you can manage the different action options of the map by enabling/disabling as per the requirement.
- You will see different action options as follows:
  - Infobox Actions
  - Bulk Actions
  - Search Options
  - Context Menu Actions
  - Floating Button Actions

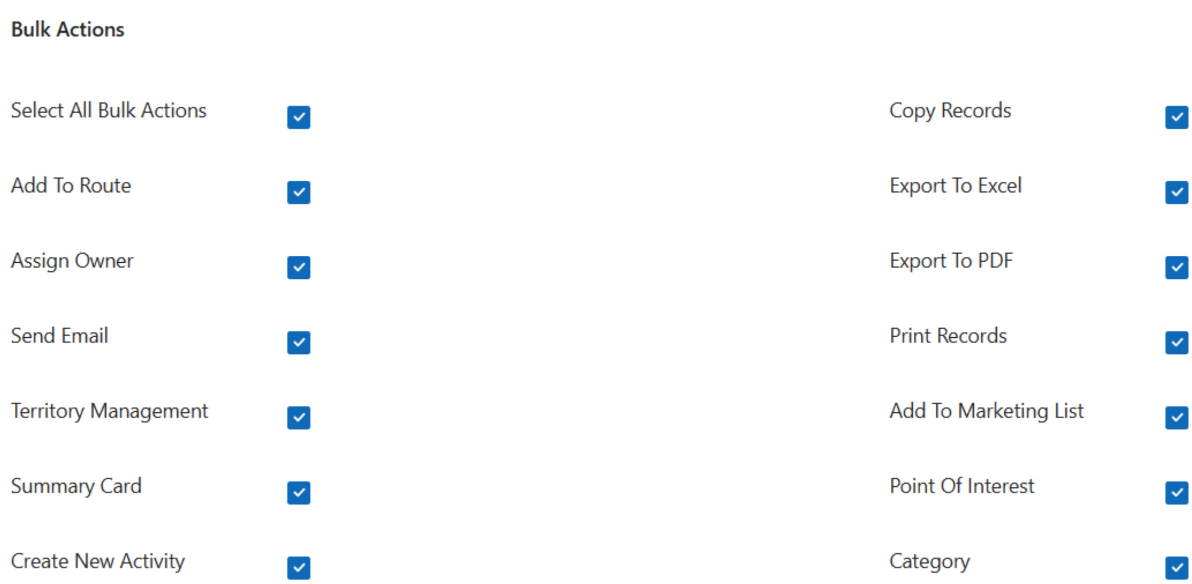
Infobox Actions

- You can select options for Infobox action (detailed card) that will appear on the right when you or CRM users click on any pushpin (a record).



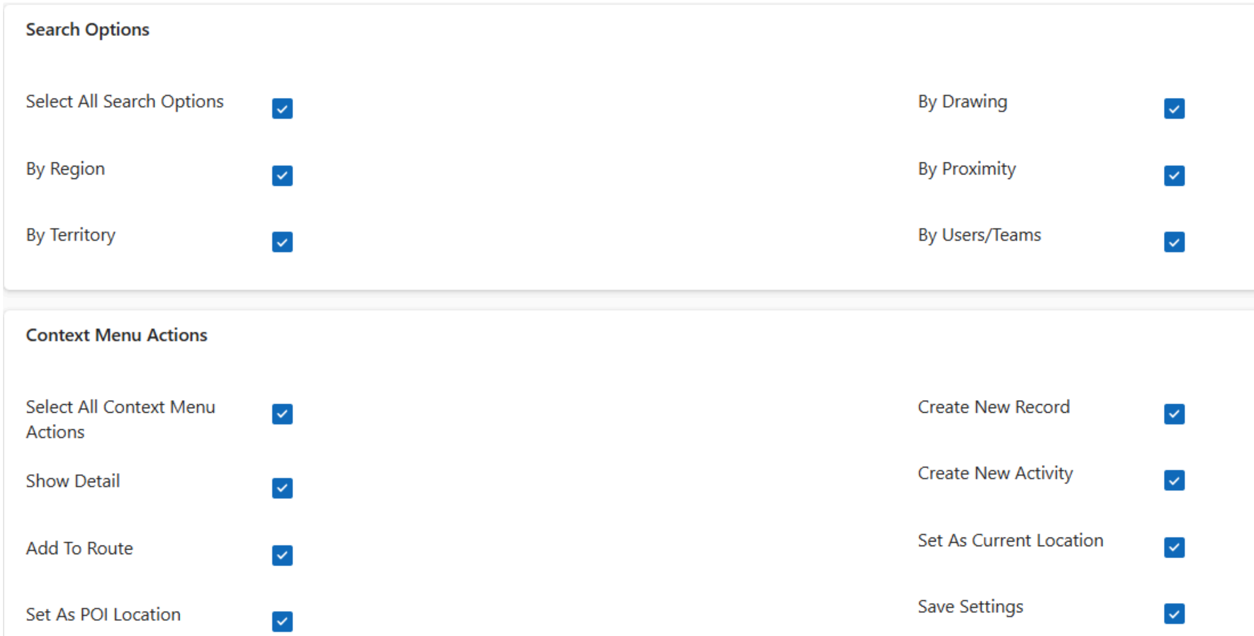
Bulk Actions

- You can enable the bulk options when you or CRM users perform such actions from the data grid view.



Search Options & Context Menu Action

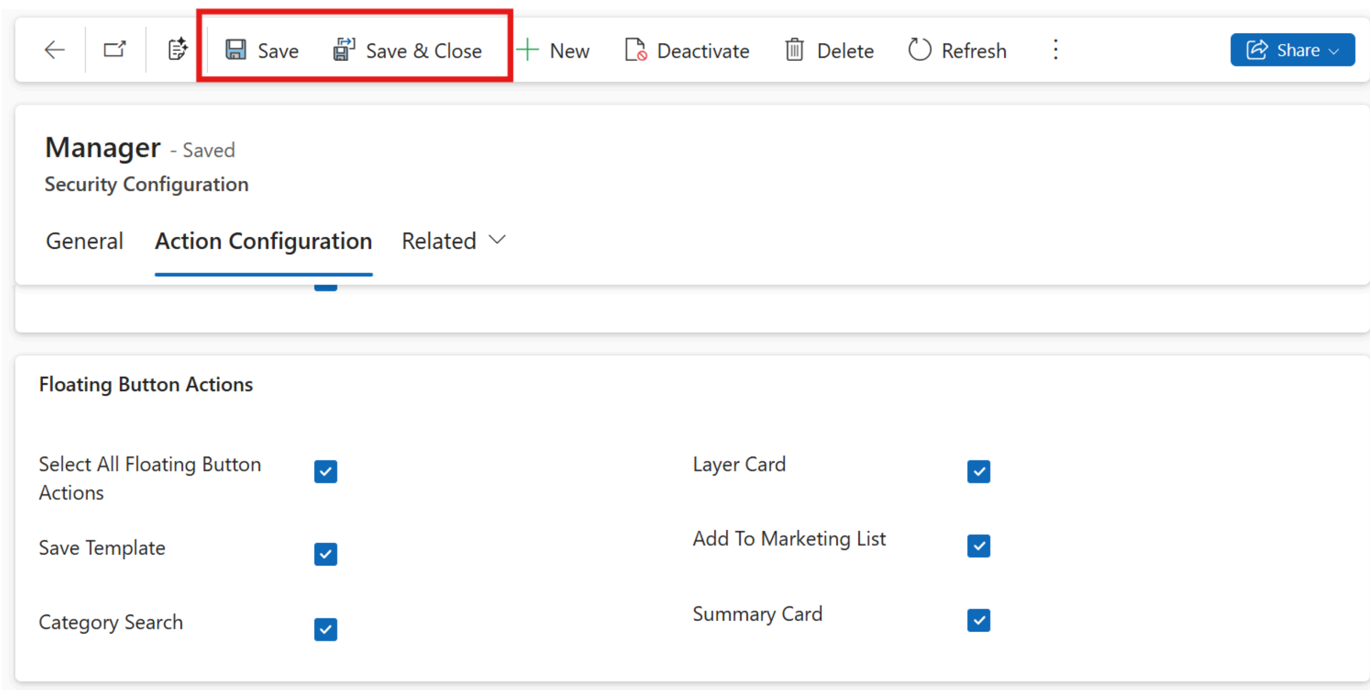
- Search Options: You can manage the options that will appear to plot the records in the **Plot** menu.



- Context Menu Actions: You can manage the options that appear on the context menu when you or the CRM users right-click on the map.

Floating Button Actions

- Floating Button Actions: You can manage the advanced options on the map that appears on the left side.

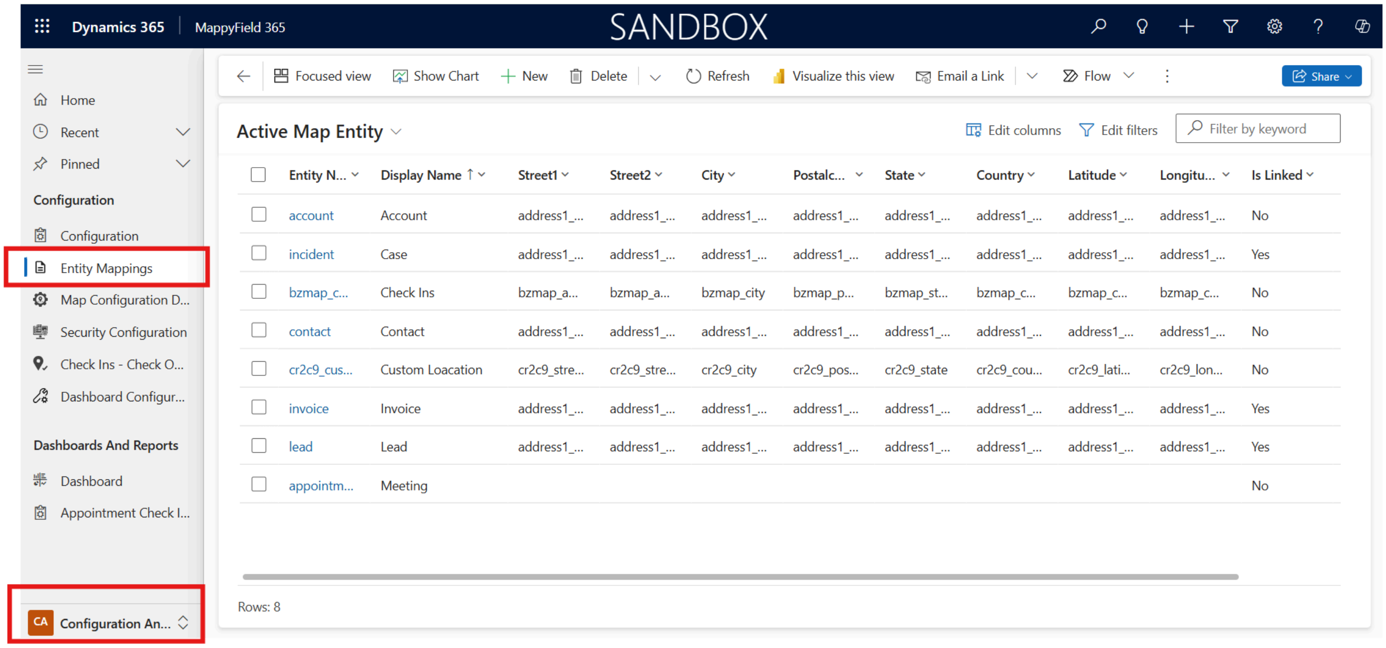


- After managing all the options as per requirement, click on the **Save** option to save the security template or click on the **Save & Close** option and you will be navigated to the listing page of the security template.

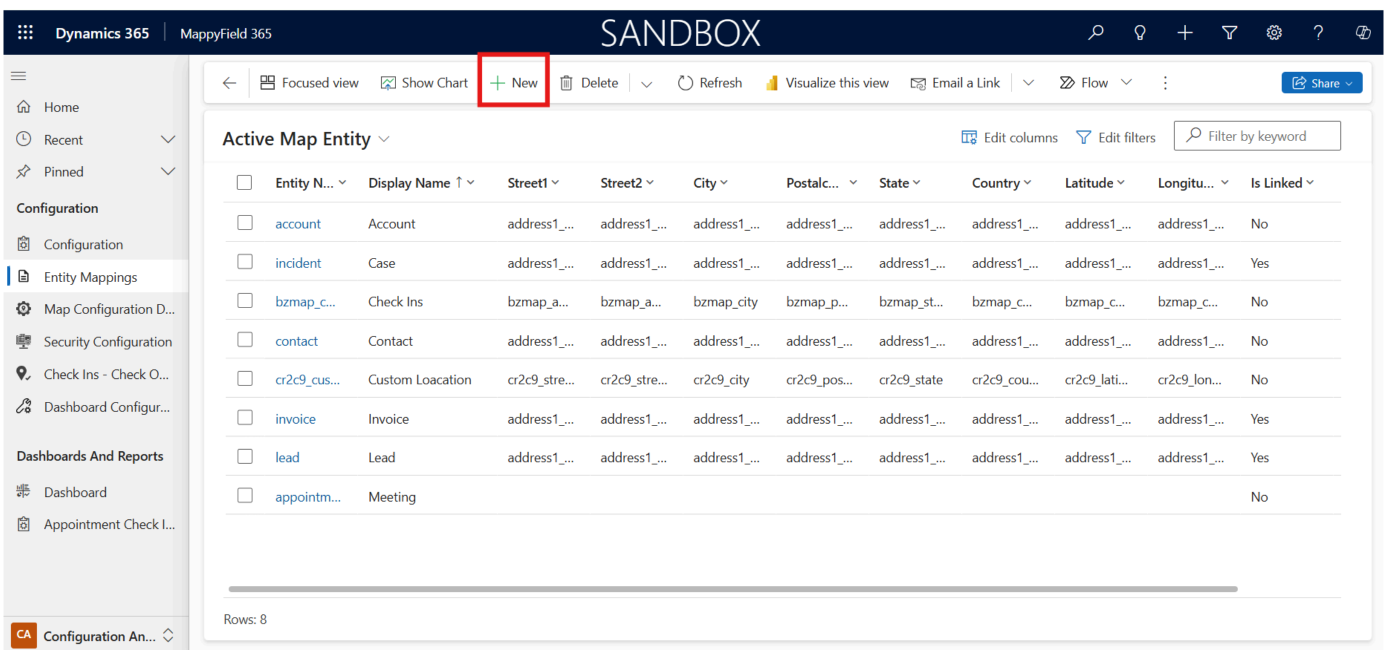
Note: After saving the security template, it would enable the "Configuration Details" section from where you can directly assign that template to a user (Map Configuration Detail). Similarly, when you are adding a new map configuration detail record, you can also assign the security template as well.

Entity Mappings

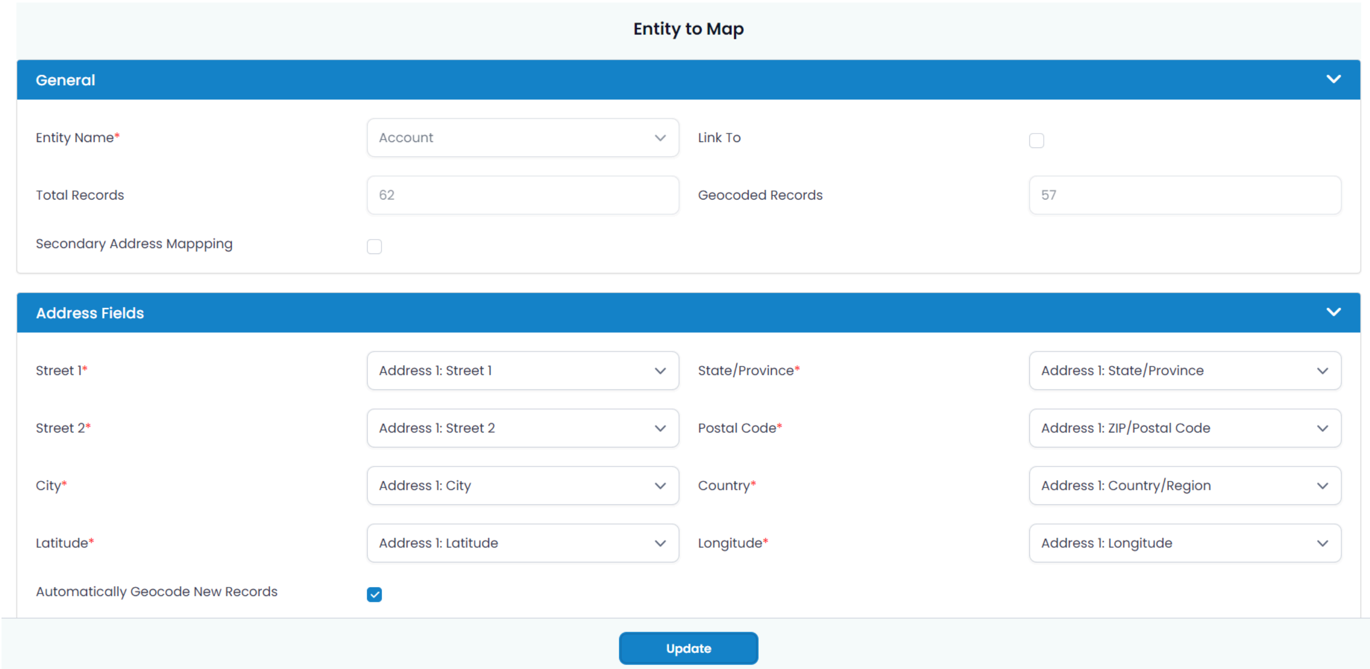
- Navigate to **Configuration And Dashboard -> Entity Mappings** to display the entity with its relevant details on MappyField 365. From here you can add a new entity and configure its required details.



- By clicking on Entity Mapping, the list of entities can be seen which are already mapped.

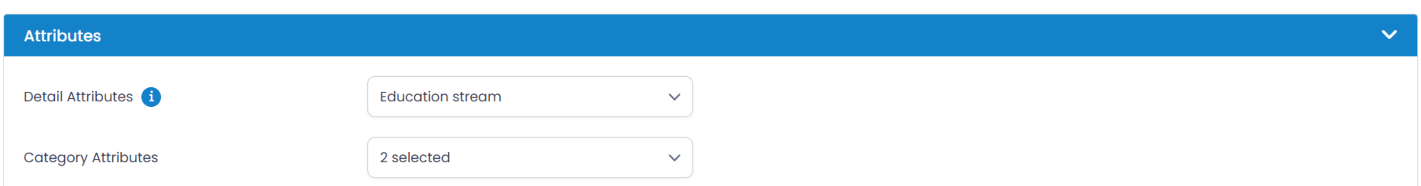


- Click on **"New"** button, this will open a new window for mapping an entity.
- **Entity Name:** Select the entity you want to map. You can choose from all the entities that are present in the CRM by default or the custom entities created by you.
- **Link To:** Check the link to option to link the selected entity to some other entity. After checking the box, you will get a list of relationships with which you can link the selected entity.



- Activity Entities work only on **Account**, **Contact** or **Lead** addresses marked as regarding address.
- **Total Records:** It displays how many records the entity contains.
- **Geocoded Records:** It displays how many records are geocoded.
- **Address Fields:** Select the address fields for the entity, to be used for geocoding. By default, it will consider map's certain address fields. If needed they can be changed.
- **Automatically Geocode New Records**: If it is checked, it geocodes the record automatically as per saving configuration.
- Once you have filled all details, click on "Save" button. Entity will be mapped, and success/failure message will be displayed.

Attributes



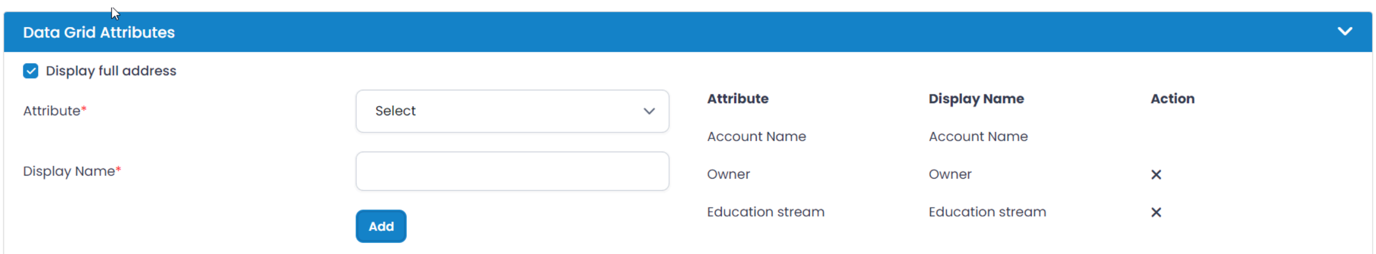
- For mapped entities, further configurations can be managed like **Attributes**. It includes **Detail Attributes** and **Category Attributes**.
- 'Detail attributes' are the ones that appear on card upon clicking on 'pushpin pointer'. At max 10 attributes can be selected.
- 'Category attributes' are the ones that appear in dropdown for 'category' selection. You can select as many attributes as you want for category selection.

Action Configuration

- For mapped entities, you can edit action configuration section where you can check/uncheck the action buttons according to your requirement.
- This will reflect on the tooltip card. Here, only those action buttons will be shown that can be changed. Default buttons will not be shown in this configuration section.

Data Grid Attributes

- From here, you can select the attributes for the **data grid**. When you plot any data in map *or* in heat map, grid data will be displayed according to attributes selected here.
- If 'Display Full Address' checkbox is checked in data grid, it will display records with full address.
- You can select maximum 8 data grid attributes.

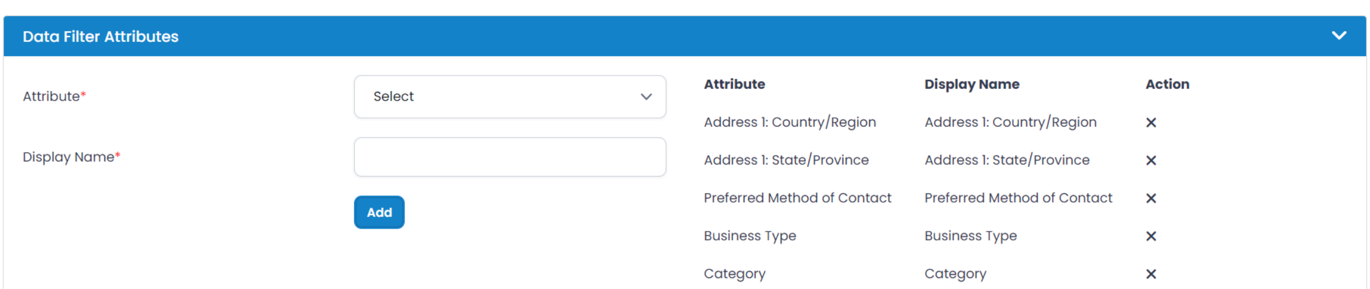


Data Filter Attributes

- Data Filter is provided on the Entity & its View record selection under the 'Plot' menu. You need to select the attributes to provide as Filter option. You can select maximum 8 data filter attributes.

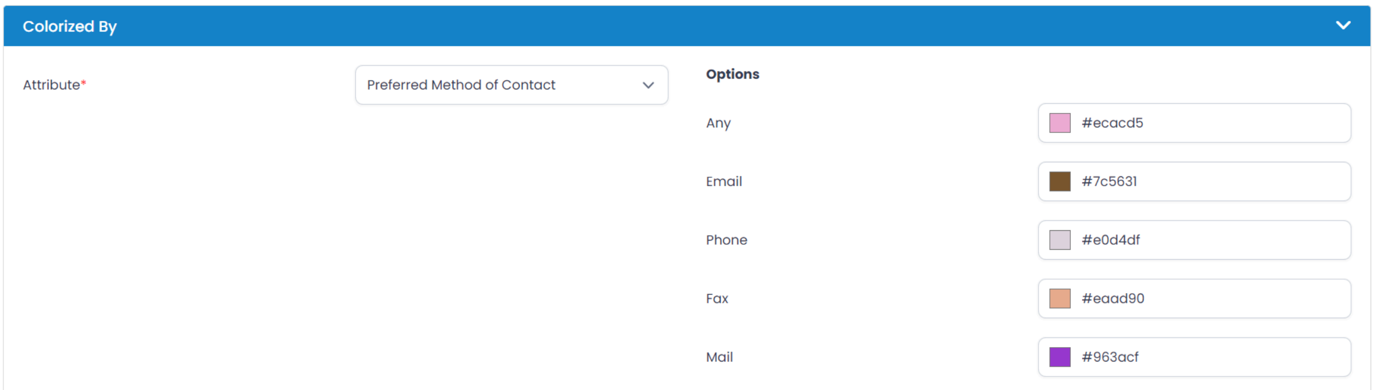
- Select the required attributes for the Filter option from the Attribute drop down list and Insert the relevant name to be displayed.

Colorized By



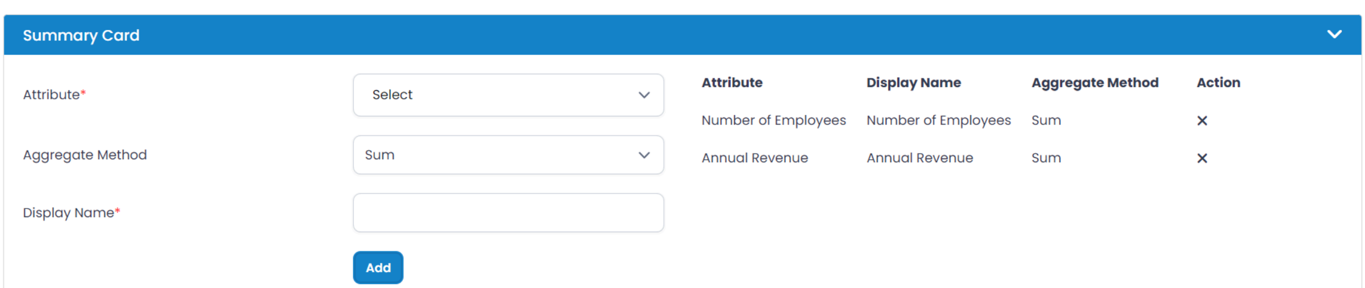
- When you want to change the color of the plotted pushpins based on the value of an option set, you can use the "Colorized By" feature.

- Select the option set in the "Attribute" dropdown. When you select the option set field, all the options related to that specific option set will appear in the "Option" selection. From there, you can select your desired color for each option.
- When you plot the entity for which you have configured the "Colorized By" feature, all the pins will be colored based on the option's configured color. If there is any record for which no option is selected, its pin color will be the same as the one selected at the time of plotting.



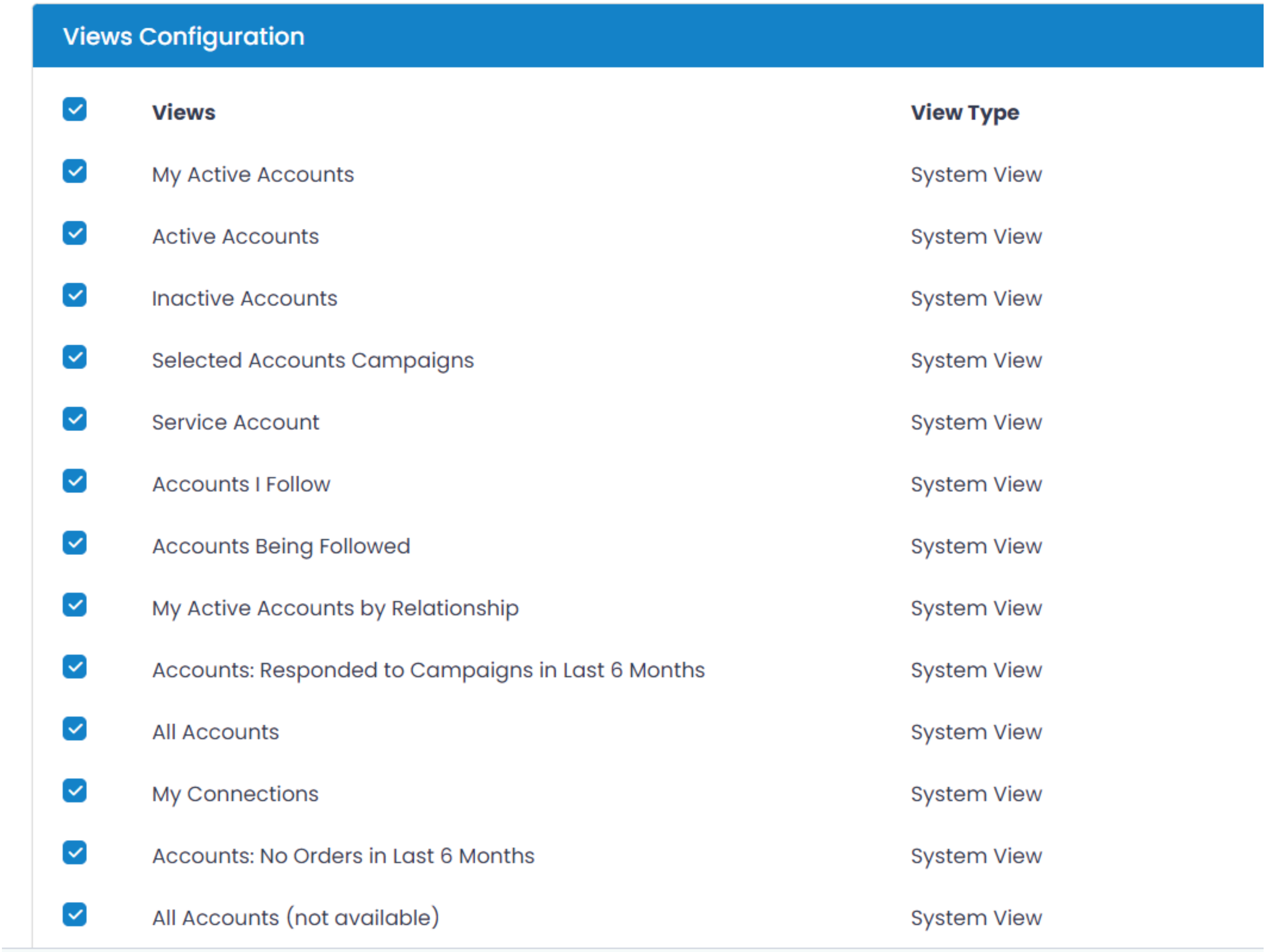
Summary Card Configuration

- You can make configurations related to what you want to display on summary card.
- For summary card of an entity, you can choose the attributes that you want from the dropdown list.
- Also, under aggregate method, you can define the way you want records to be summarized. It can be either sum or average. Also, you may define display name of that attribute.
- By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.



Views Configuration

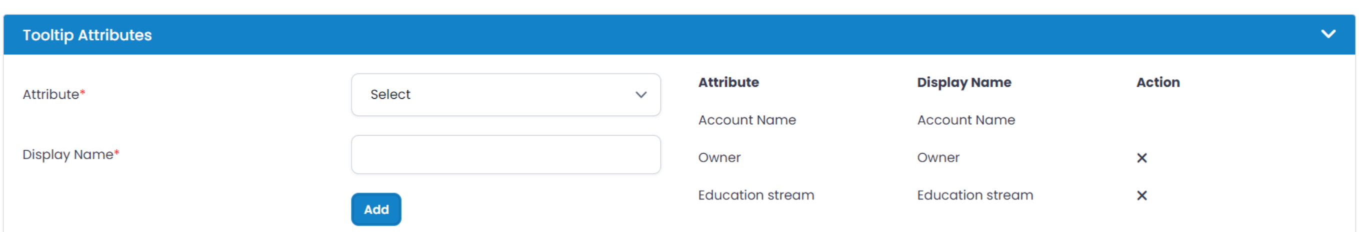
- You can select the view that you want to display on the map for particular entity.



Views Configuration

Views	View Type
My Active Accounts	System View
Active Accounts	System View
Inactive Accounts	System View
Selected Accounts Campaigns	System View
Service Account	System View
Accounts I Follow	System View
Accounts Being Followed	System View
My Active Accounts by Relationship	System View
Accounts: Responded to Campaigns in Last 6 Months	System View
All Accounts	System View
My Connections	System View
Accounts: No Orders in Last 6 Months	System View
All Accounts (not available)	System View

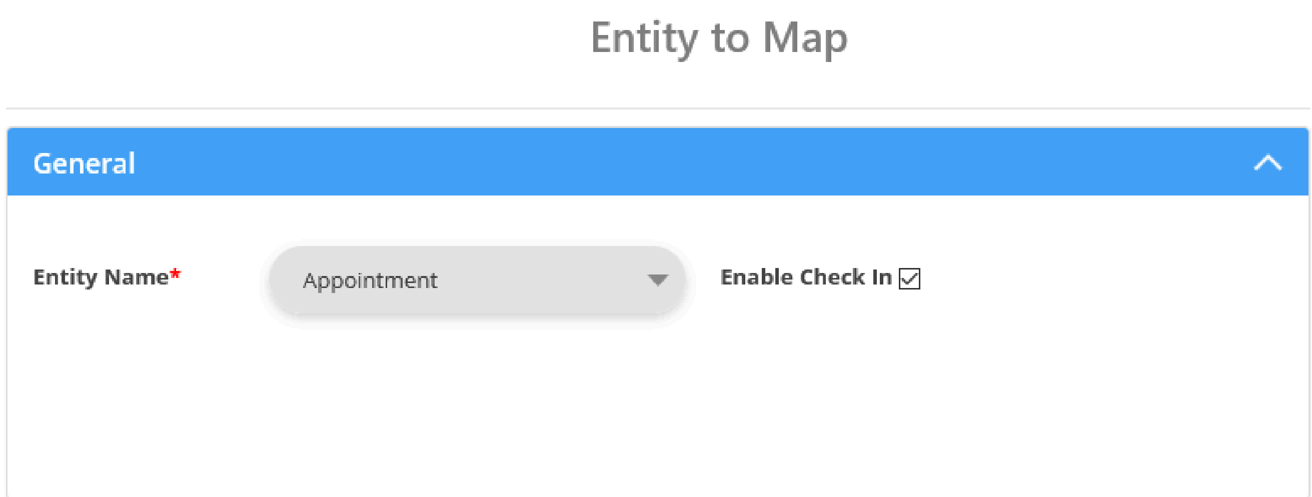
Tooltip Attributes Configuration



- You can make configurations related to what you want to display on ‘tool tip’ when anyone hovers on that record.
- For that, you can choose the attributes that you want from the dropdown list. You may also define display name of that attribute. By default, it is same as attribute name. All the selected attributes are shown in the list from where it can be removed as well.
- After making all the configurations, click on Update button to complete the process.

Enable Check-In

- You will get Check-In & Check Out options for all activity entities along with **Add Notes** and **Attachment** options.
- To enable the **Check In** option for the activities like etc., tick the **Enable Check In** option.

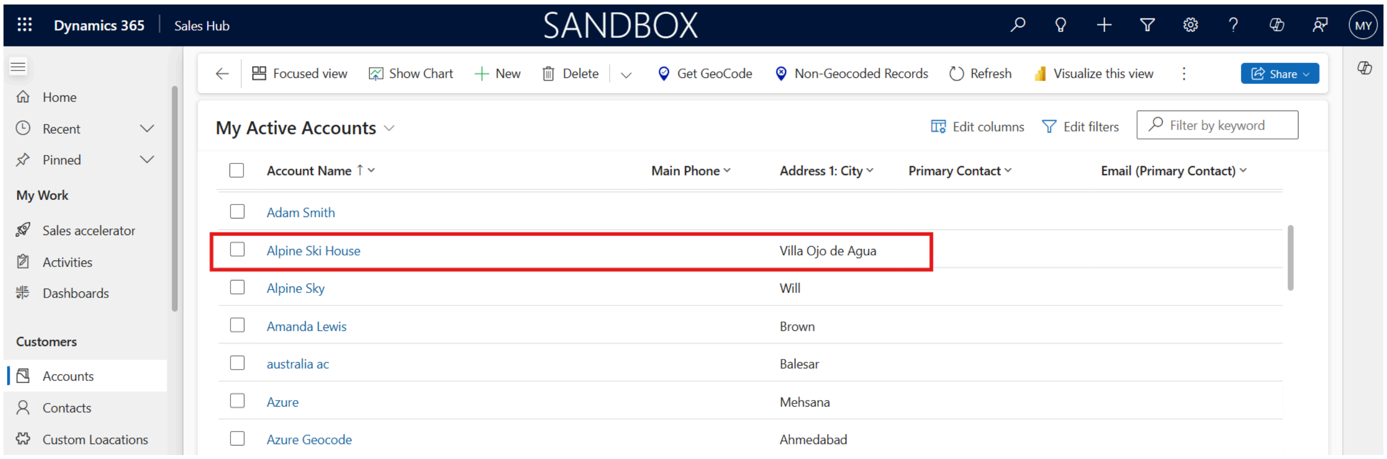


- By checking it, you will get the **Check-In** & **Check-Out** features for your activity.

Geocode Records

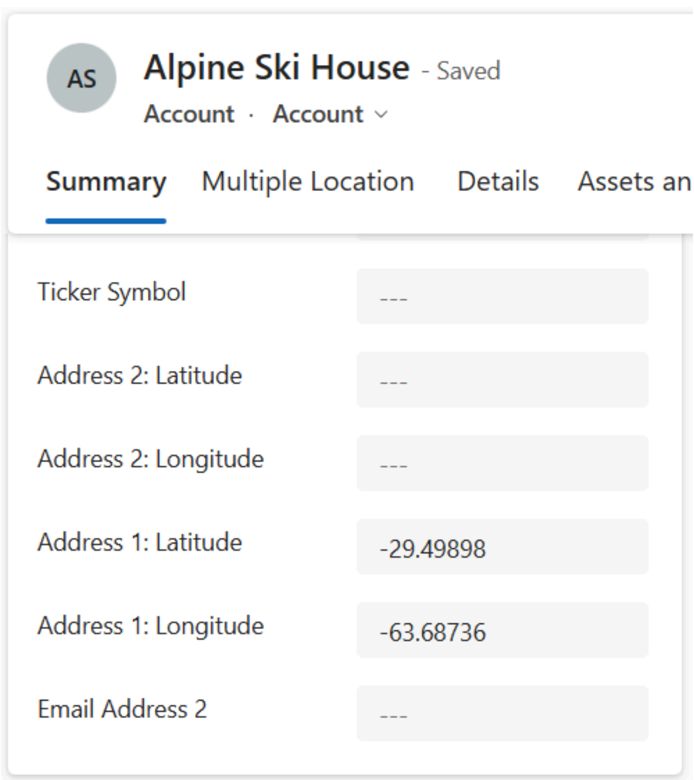
Manually Geocode the Record

- Navigate to the record for which you want to manually set a geocode: Latitude & Longitude.



- You will get the Geocode as per your selection of view. Here you get the Geocode for "My Active Accounts". If you have not selected any record, it will get Geocode for all the Records.

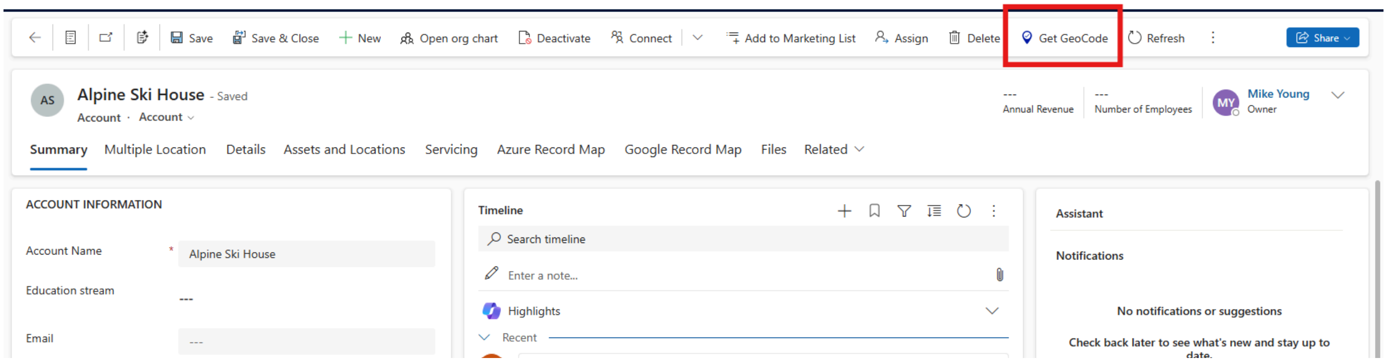
  Ex. If you want to geocode any record of account, go to **Sales -> Accounts** and select a record.



After selecting a record and clicking on **Get Geocode**, the "Latitude" & "Longitude" will get updated as per the address details.

If you check, the account details, the Geocode: Latitude & Longitude is updated as shown in the screenshot.

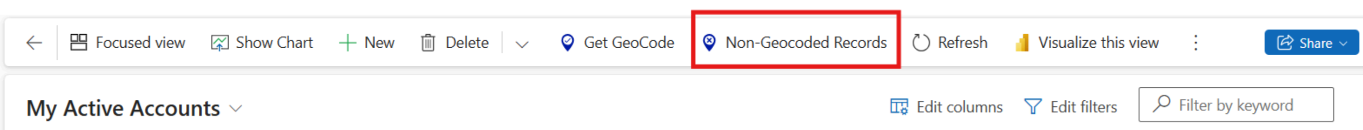
Note: You get option to geocode records only when that particular entity is **mapped** from Entity Mappings configuration.



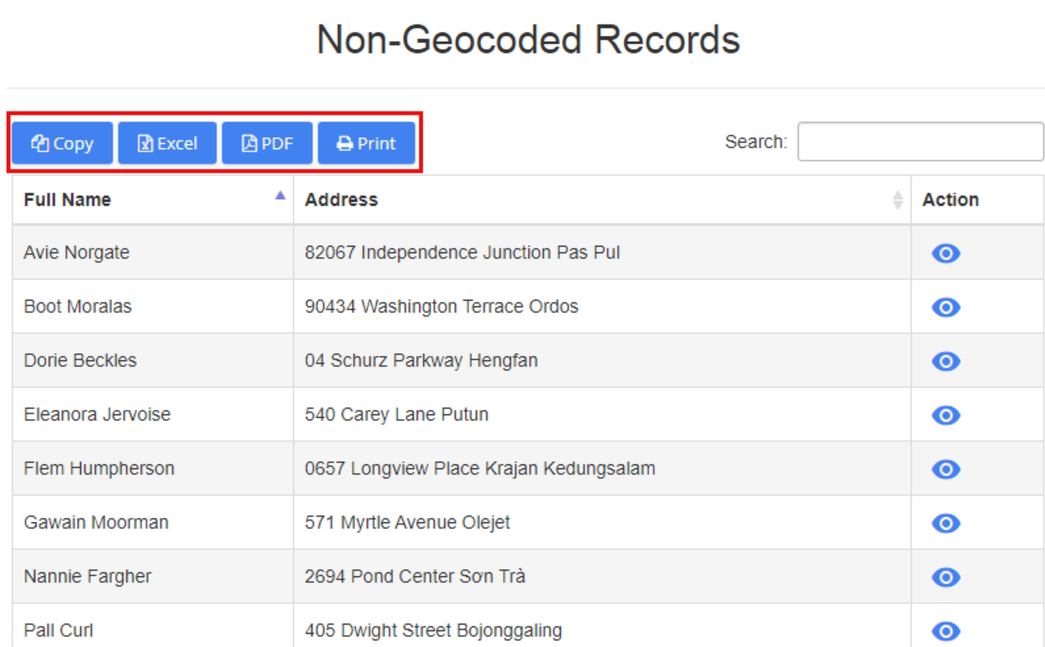
- If you changed the address, then you need to manually geocode that record by clicking on the "Get Geocode" button from the menu.

Non-Geocoded Records

- Navigate to the entity for which you want to get a non-geocode detail.
- For example, if you want to check the Non-Geo Coded records from the multiple records of an account entity, go to **Sales -> Account**.



- Click on **Non-Geocoded Record** button, it would show listing of all the non-geocoded records along with their address.
- You can also view details of the record by clicking on view icon under action column.



Non-Geocoded Records

Copy Excel PDF Print

Search:

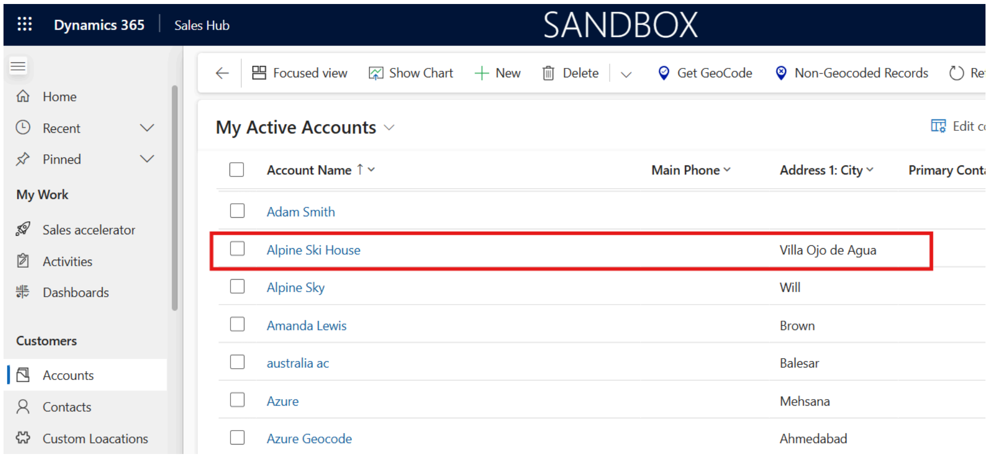
Full Name	Address	Action
Avie Norgate	82067 Independence Junction Pas Pul	
Boot Moralas	90434 Washington Terrace Ordos	
Dorie Beckles	04 Schurz Parkway Hengfan	
Eleanora Jervoise	540 Carey Lane Putun	
Flem Humpherson	0657 Longview Place Krajan Kedungsalam	
Gawain Moorman	571 Myrtle Avenue Olejet	
Nannie Fargher	2694 Pond Center Sơn Trà	
Pall Curl	405 Dwight Street Bojonggaling	

- For the list generated, you can also perform actions like **Copy, Excel, Pdf, Print** and **Search** as well.

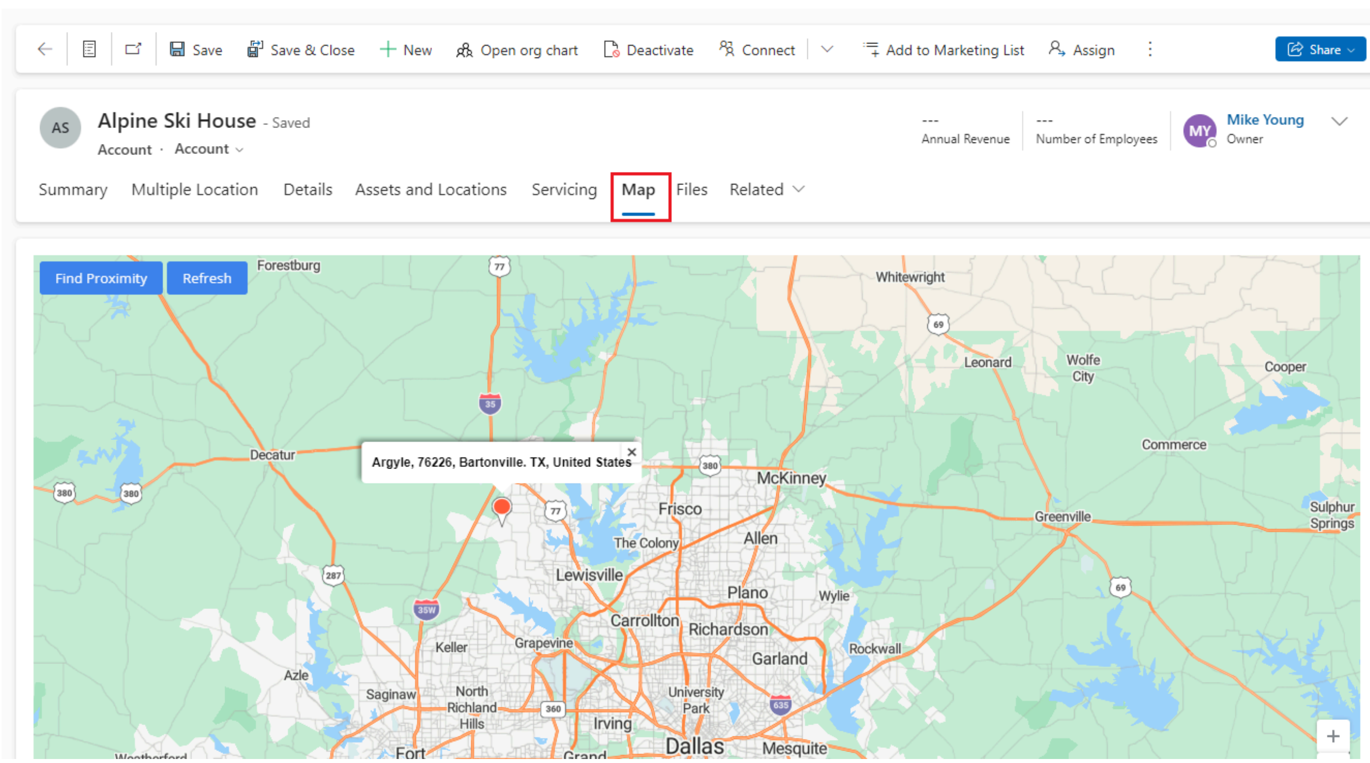
Individual Records on Map View

MappyField 365 section in Record Details

- MappyField 365 is separately provided in the **Details** page of any record of all the mapped entities.
- Click on any record of account entity.

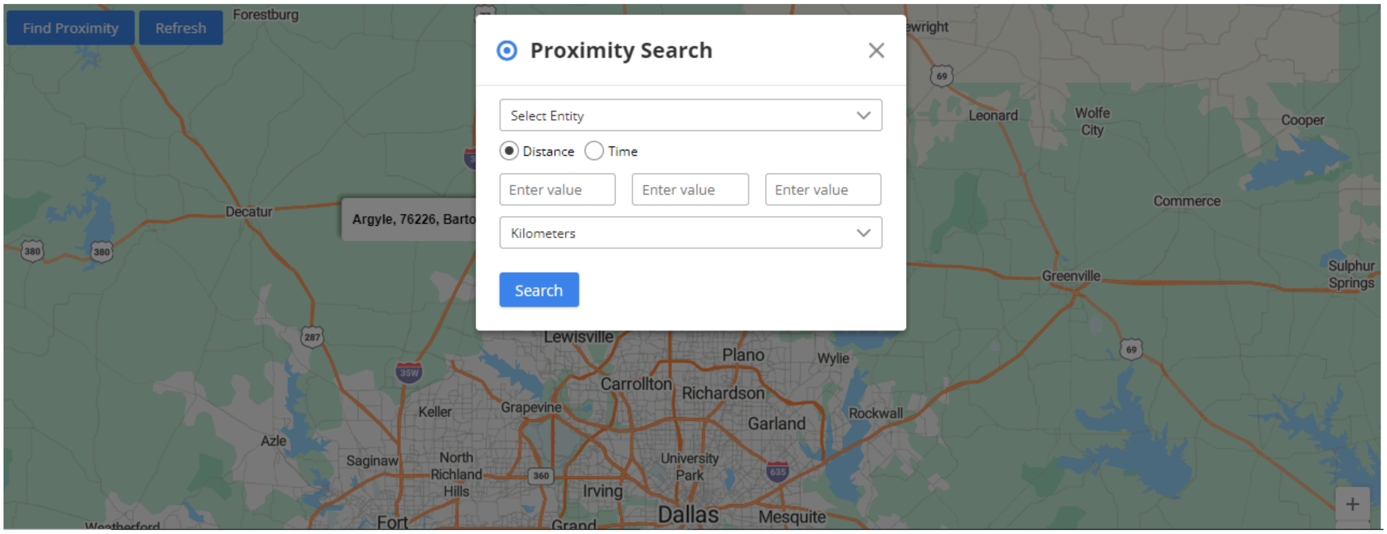


- By clicking on the account name, you will get the summary and the details of that account and by scrolling down, you will get the separate 'MappyField 365' section.



- On map there is a pin plotted based on the address entered for the record.
- To update the latitude and longitude of the record, you need to move the pin to the desired location. On moving, it would prompt a confirmation message. Click **OK** to update and continue.
- You can update latitude and longitude using record map for records of Account, Contact and Lead Entities.

- Along with that there are three action buttons: **Proximity**, **Get Related Records** and **Refresh**.
- **Find Proximity**: Clicking on it, you can perform proximity search from that pin and find records nearby. It would show records based on entity selected from the dropdown.



- **Refresh**: This button would just refresh the map to default map type removing any action performed on map.

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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