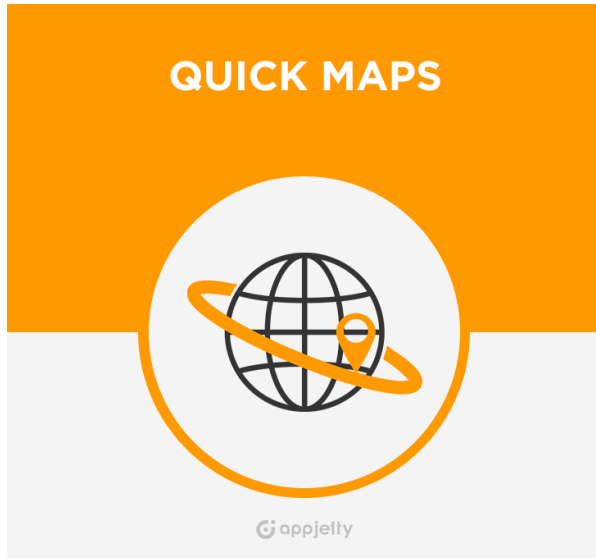


USER MANUAL



Quick Maps

Version: 2.0

Compatibility:

Microsoft Dynamics CRM 2016(v8.0) and above

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Introduction

Quick maps Dynamics CRM plugin that aims at providing geo-analytical solutions to CRM users and helps them to plot CRM data in maps. It lets user choose an entity in CRM, choose a view and plot all individual records from that entity on the map. Multiple entities at a time can be mapped. Also, different user preferences as such map configurations, zoom levels and views can be saved for future references.

Benefits of Quick Maps

- Ease of access
- Plot any entity record on the map
- Proximity Search across entities simultaneously
- Build marketing list
- Point of interest search
- Color coding of pushpins based on configurable categorizations
- Routing with multiple waypoints
- Ability to save & share driving directions
- Sales analysis becomes easy with Opportunity and Sales Heat Map
- Seamlessly integrates within Dynamics CRM

Prerequisites

Following point must be followed before starting the Plugin installation:

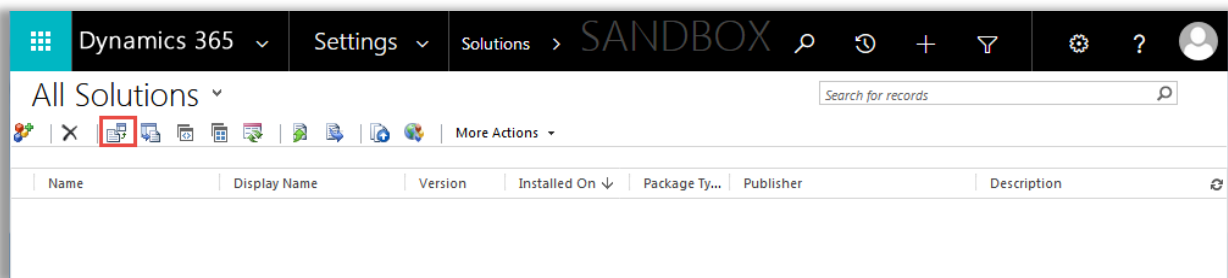
- You should be logged into Dynamics CRM Online (Version 8.0 and above).
- You will have to generate Google Geocoding API key.

Installation & Configuration

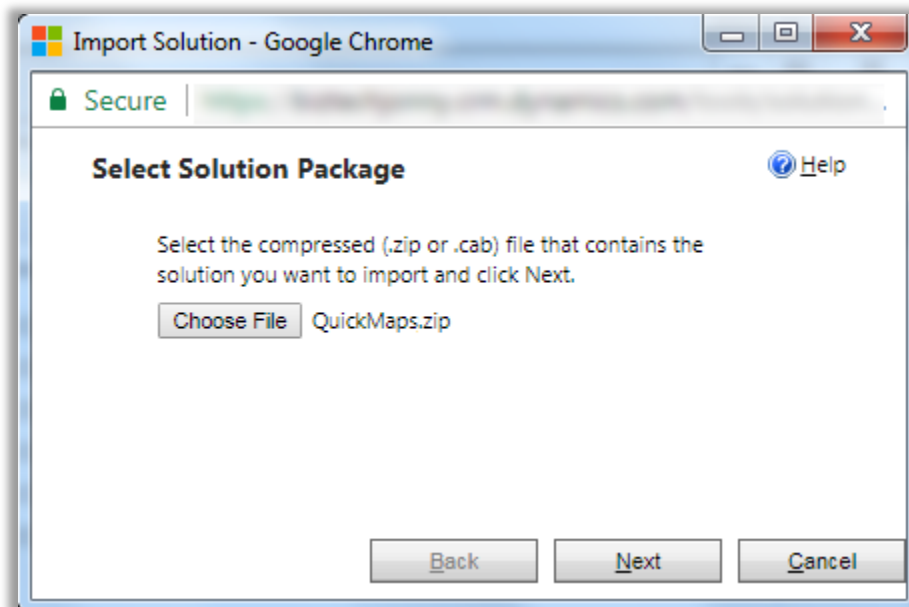
Installation Steps

To install 'Quick Maps' plugin, the following steps are to be followed:

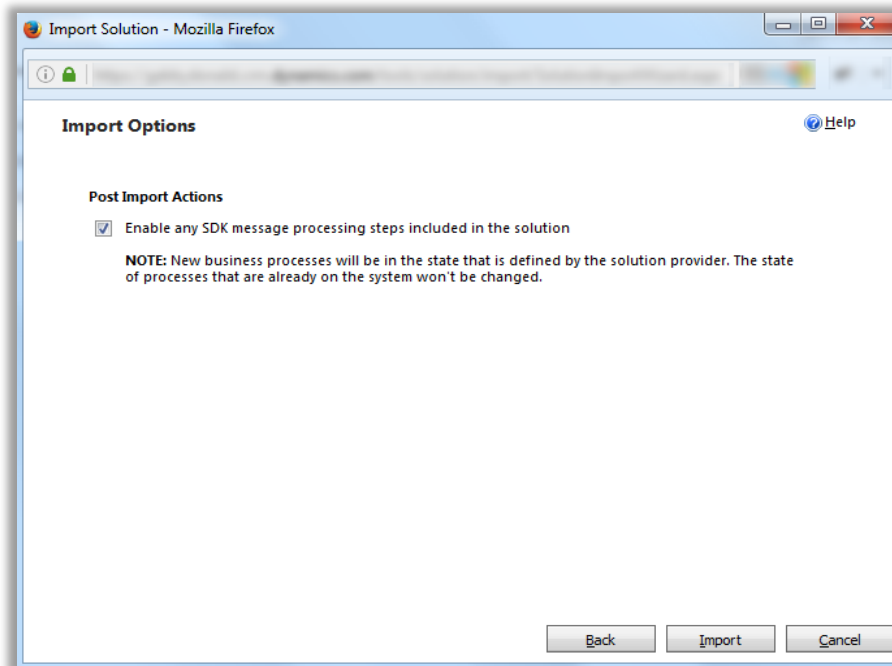
- On purchasing the plugin, you will get a zip file named "QuickMaps.zip".
- Login into your CRM Account and click on **Settings -> Solutions**.



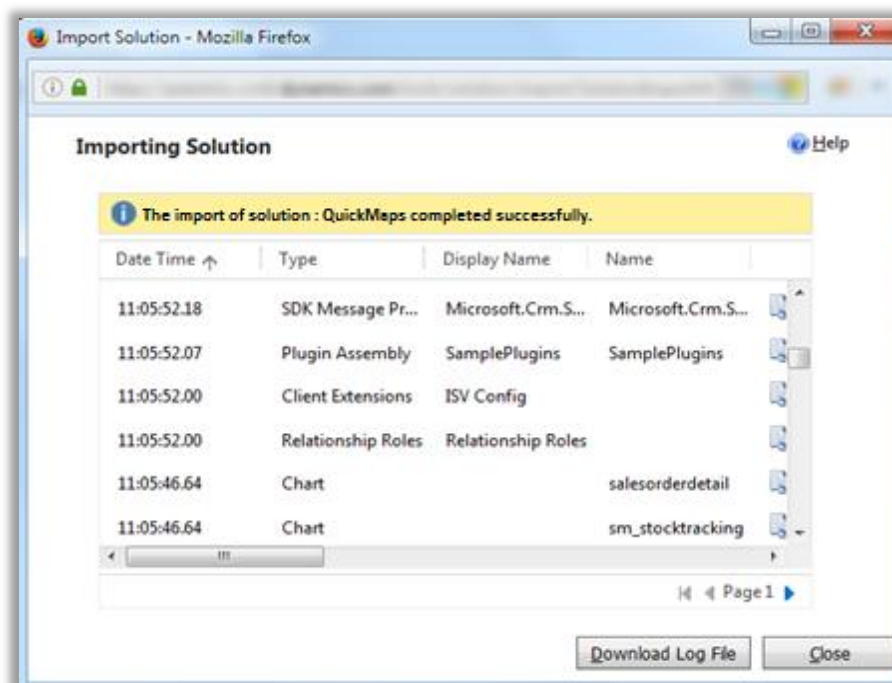
- Click on 'Import' to upload and install the Solution.
- Click on 'Choose File' button and choose the Package Zip File for **Quick Maps** from the Import Solution Window.



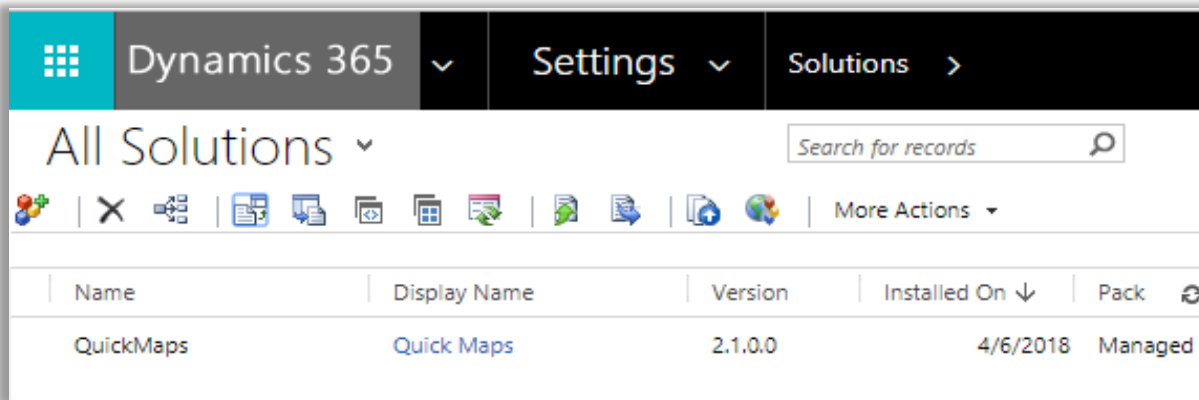
- Click on 'Next' for further processing.



- Check the box to enable any SDK message processing steps included in the solution and click on Import button to Import the Solution.



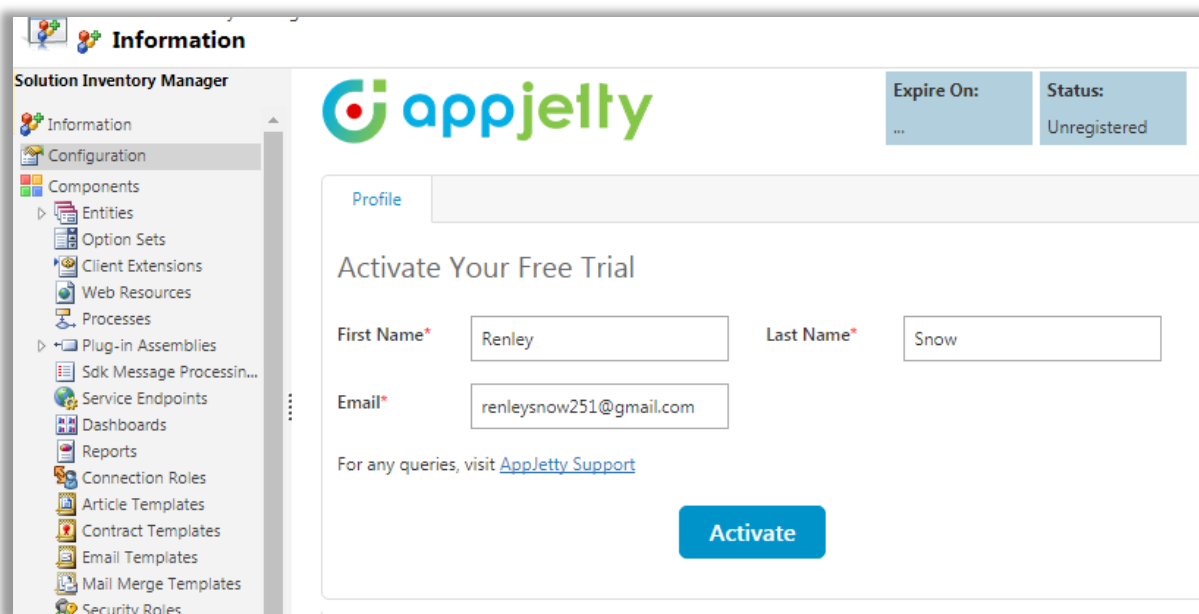
- Click on 'Close' after successful completion message is displayed.



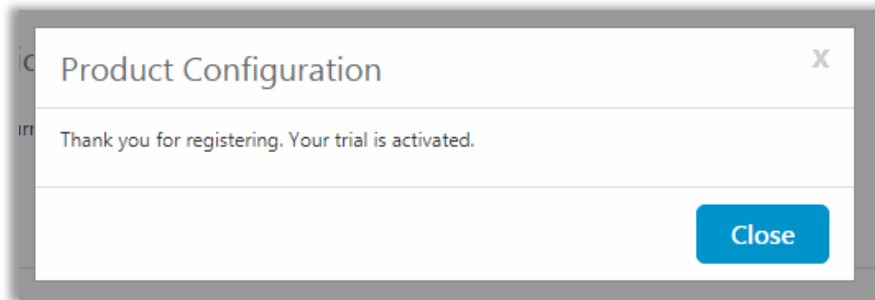
- Once you import the solution, it will be displayed in the solutions grid view.

Configuration Steps

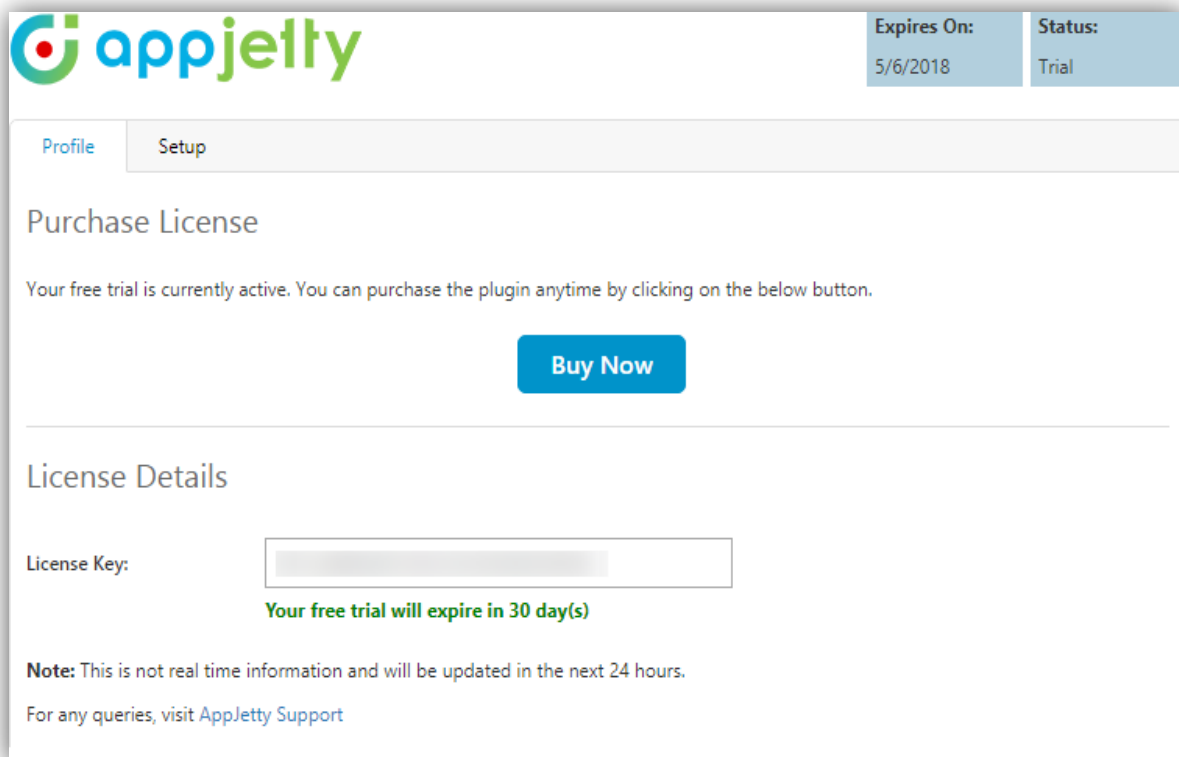
- Double click on 'Quick Maps' solution to configure the plugin with your license key.
- This will open up a new window. Click on 'Configuration' from the options provided on the left side.



- You can activate your one-month free trial.
- To get a one-month free trial license key, fill out the details and click on 'Activate' button.



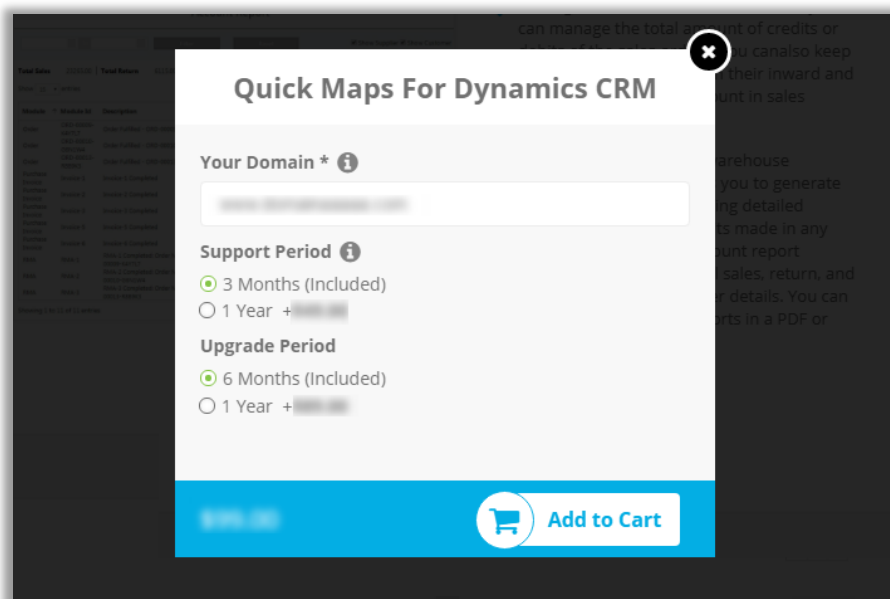
- Your trial will get activated and expiry date will be displayed on top.



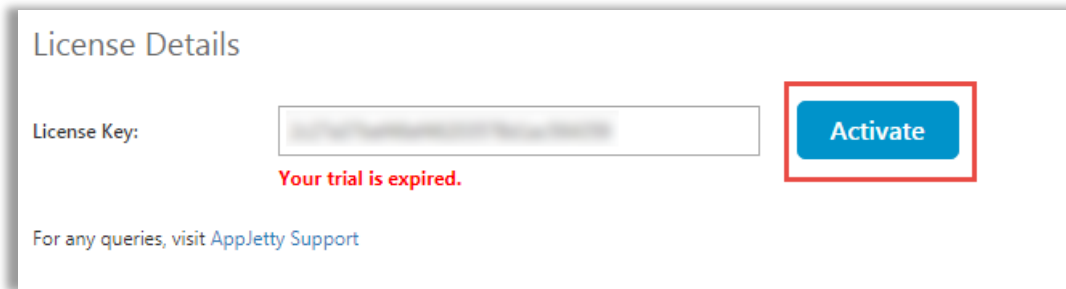
- You can purchase the licensed version any time. To purchase the license, click on 'Buy Now' button.



- On expiration of Trial, a message will appear that the Trial is expired. Now to purchase the license click on **'Buy Now'** button.
- This will redirect you to our product page and a pop-up will appear. Click on **'Add to Cart'** button and complete the purchase process.



- On successfully completion of the purchase process, you will receive your license key via email along with steps to complete the license configuration.



License Details

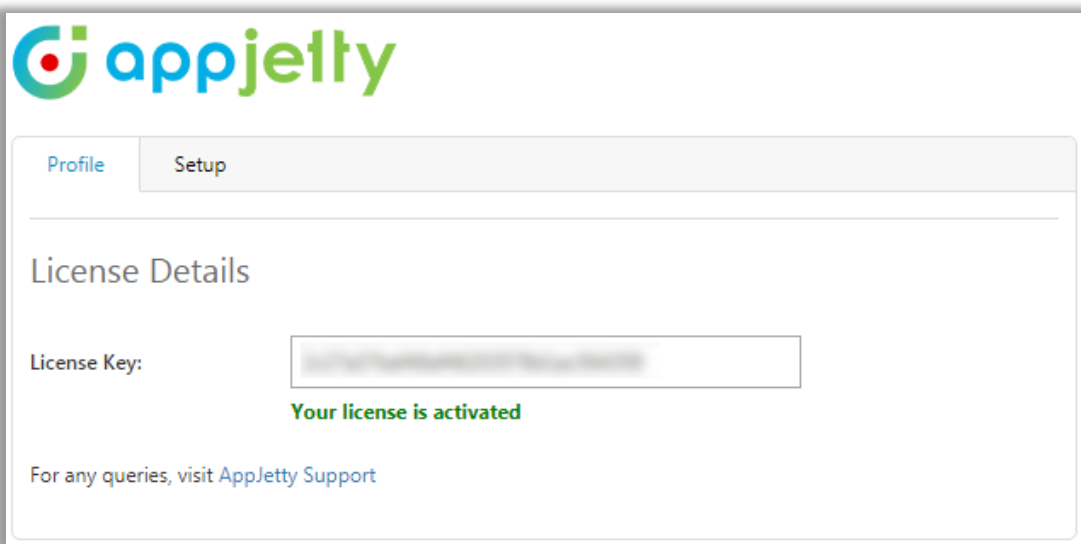
License Key:

Activate

Your trial is expired.

For any queries, visit [AppJetty Support](#)

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



appjetty

Profile Setup

License Details

License Key:

Your license is activated

For any queries, visit [AppJetty Support](#)

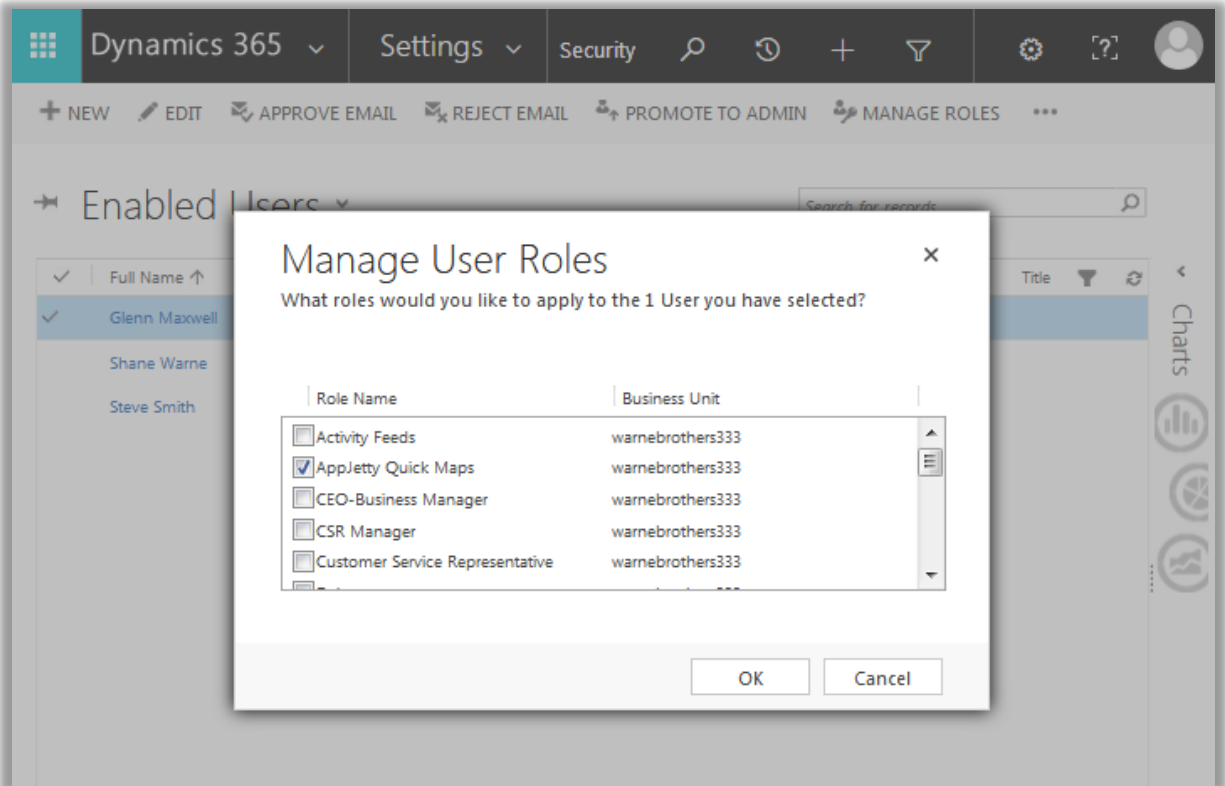
- Once you activate the license, '**Setup**' tab will be displayed besides the '**Profile**' tab.

The screenshot shows the 'Setup' tab of the DynamicsCRM Quick Maps configuration window. It is divided into four sections: 'Google Credentials' with a 'Map API Key*' field; 'Default Configurations' with 'Latitude*' (23), 'Longitude*' (72), and 'Zoom Level*' (12) fields; 'Default Limits' with 'Max. Plot' (12), 'Radius(Miles)*', 'Distance Unit*' (Miles), and 'Direction*' (Shortest time) fields; and 'General' with 'Cron Settings' (unchecked) and 'Error Log' (checked) checkboxes. 'Save' and 'Cancel' buttons are at the bottom left, and an 'Activate' button is at the bottom right.

- To manage the default configuration settings, click on **'Setup'** tab and enter default configurations.
- **Map API Key:** Enter google map API key which you have generated from <https://console.developers.google.com/apis>.
- After that for **"Default Configurations"** set default latitude, longitude and zoom level for map when it is opened for the first time.
- Also set default limits for maximum plot radius, distance unit and direction.
- If you want your records to get updated after specific time interval, enable **"Cron settings"** and select days.

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 up a pop up to select roles.
- To access AppJetty product entities assign **'AppJetty Quick Maps'** role to selected users.



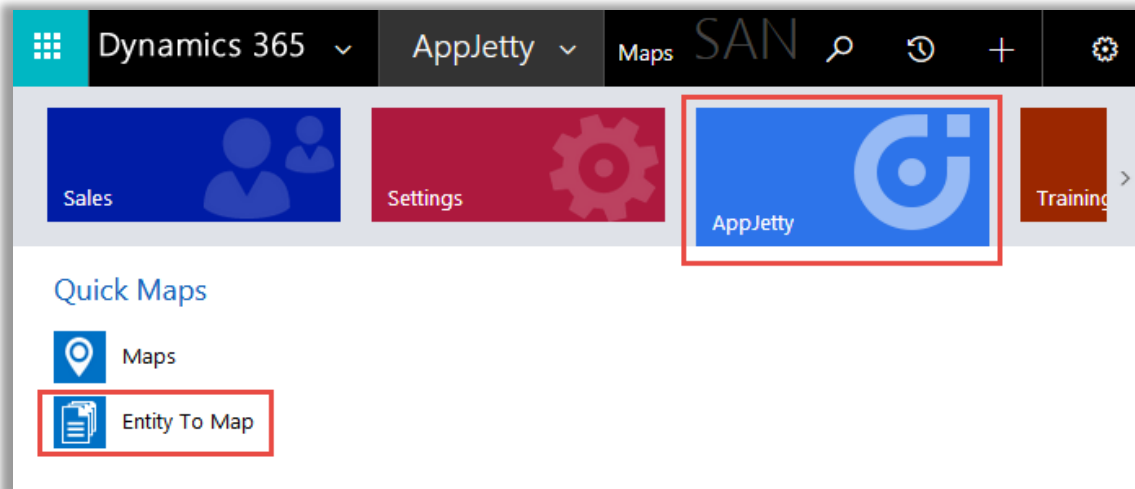
Note:

- **'System Administrator'** will also be able to access AppJetty Product Entities.

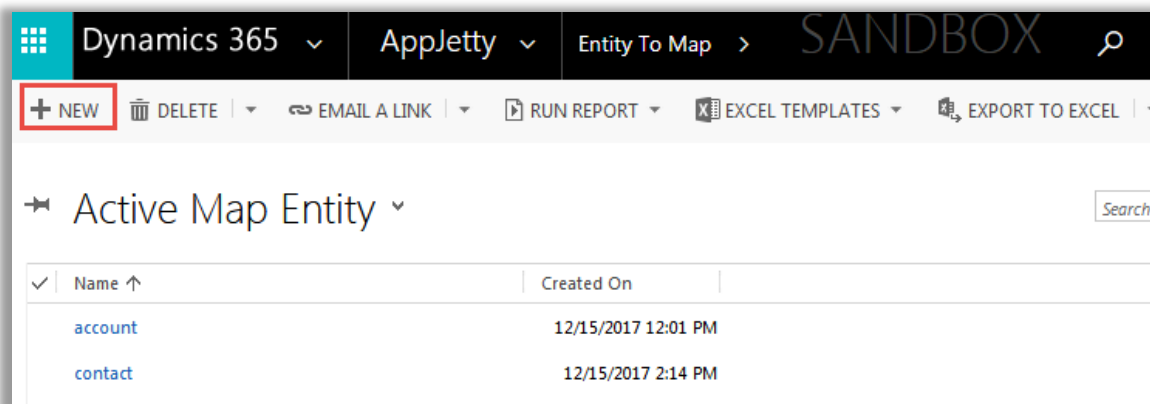
Procedure

Entity to Map

- Navigate to AppJetty tab and select Entity to Map.



- It will list entities which are already mapped.



- Click on “New” button, this will open a new window for mapping an entity.

Entity to Map

General

Entity Name*

Contact ▼

Total Records

15

Geocoded Records

6

Address Fields

Street 1*

Address 1: Street 1 ▼

State/Province*

Address 1: State/Province ▼

Street 2*

Address 1: Street 2 ▼

Postal Code*

Address 1: ZIP/Postal Code ▼

City*

Address 1: City ▼

Country*

Address 1: Country/Region ▼

Geocoding

Latitude*

Address 1: Latitude ▼

Longitude*

Address 1: Longitude ▼

Geocode New Records

☒

Record saved successfully

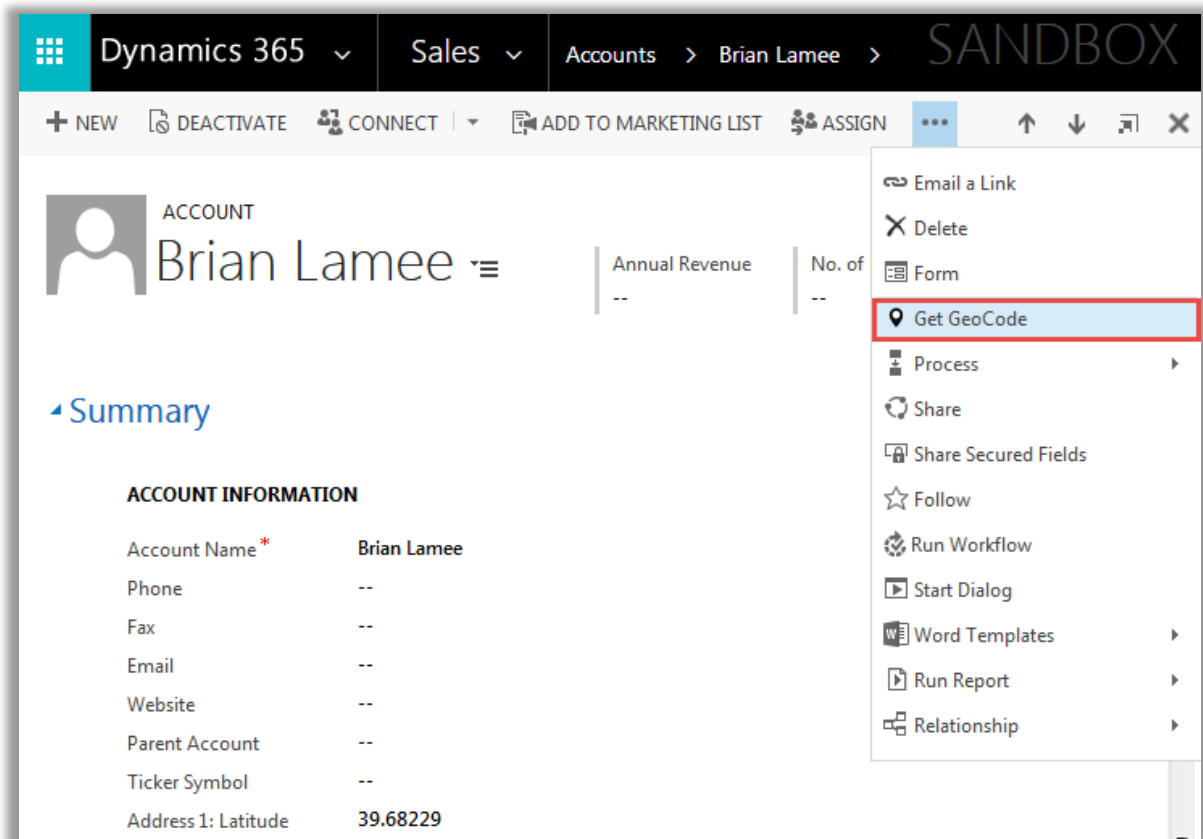
SAVE

CLOSE

- **Entity Name:** It provides entity list, select the entity you want to map.
- **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.
- **Geocoding:** Select latitude and longitude for the entity.
- **Geocode New Records:** If it is checked, it geocodes the records automatically.
- Once you have filled all details, click on **“Save”** button. Entity will be mapped and success/failure message will be displayed.

Manually Geocode the Record

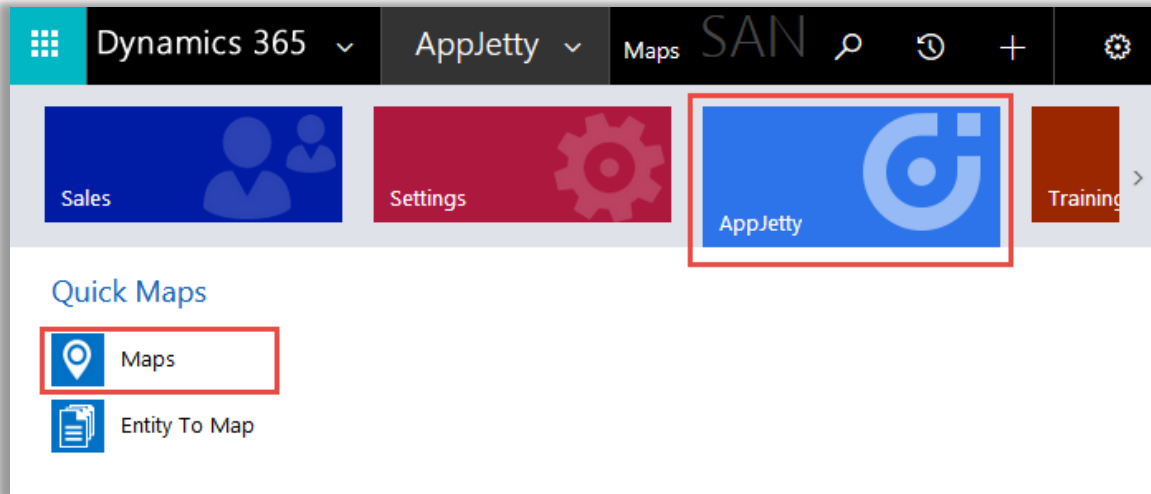
- Navigate to the record for which you want to manually set a geocode. For example, if you want to geocode for any record of account, go to **Sales -> Accounts** and select a record.



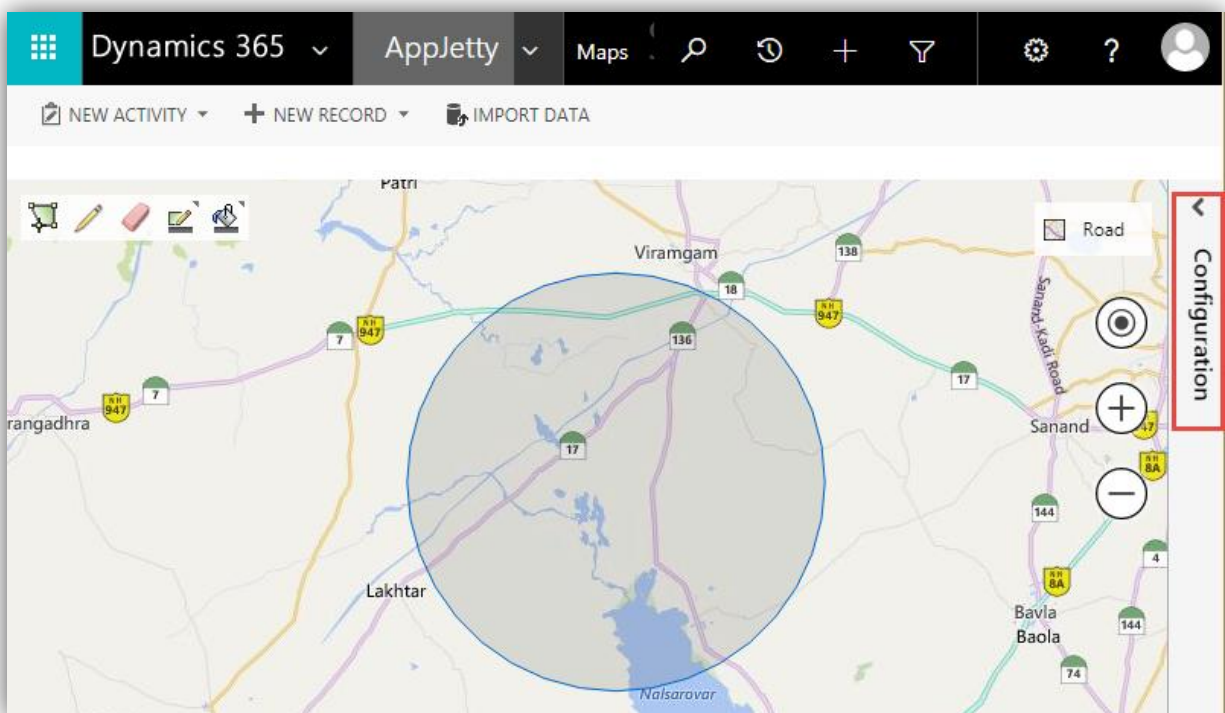
- If you have changed the address, then you need to manually geocode that record by clicking on “**Get Geocode**” button from ribbon.

Map Configurations

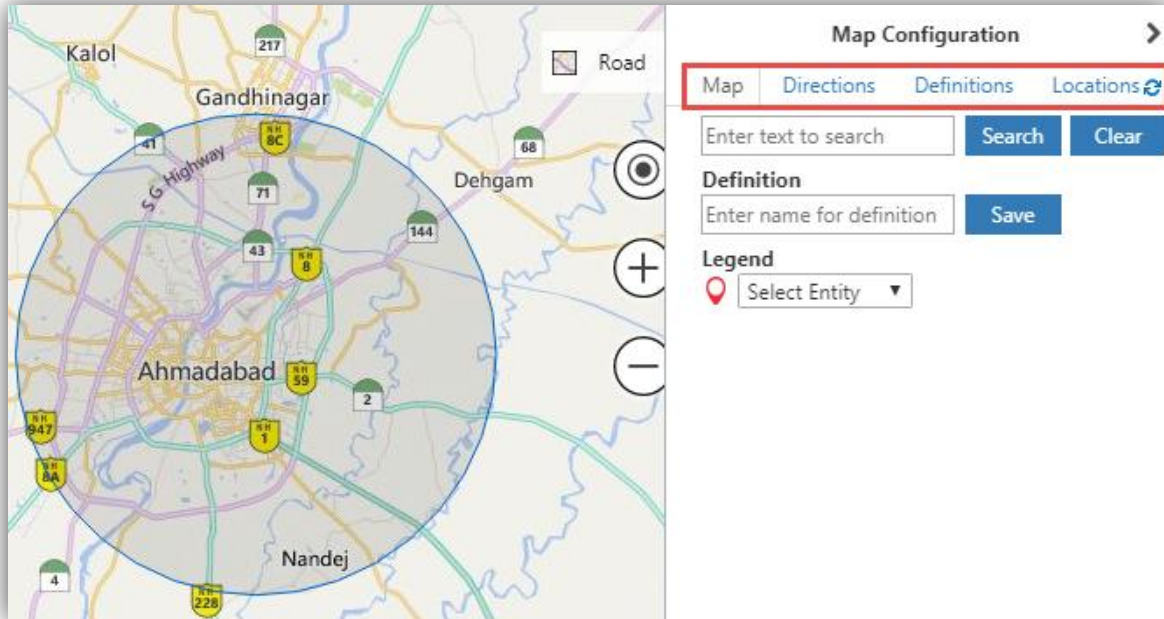
- Navigate to AppJetty tab and Select Maps.



- It will open the map with the default configurations you have set from advance settings.



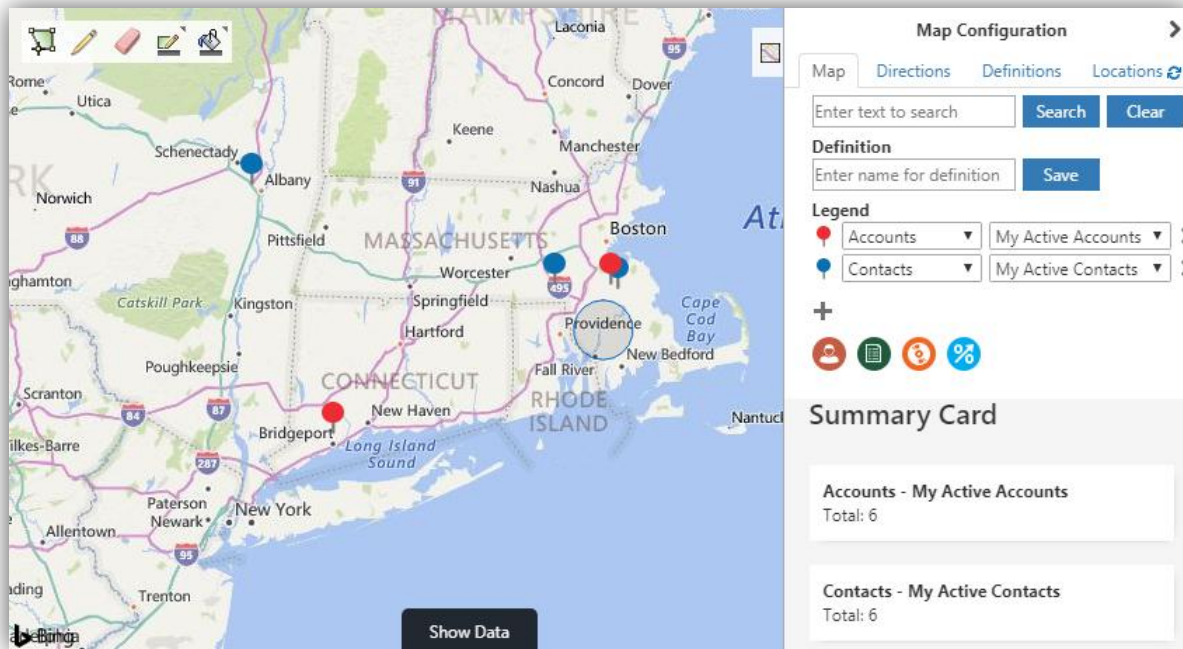
- Select “Configuration” tab from right side.



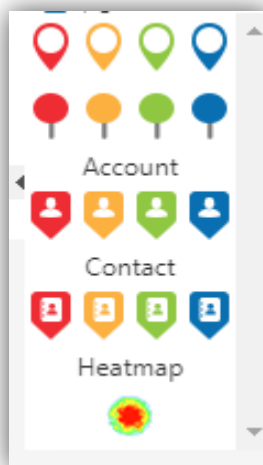
- You will have four options to open/view records in maps.
 - Map
 - Directions
 - Definitions
 - Locations

Map

- In map, you can add and select legend.

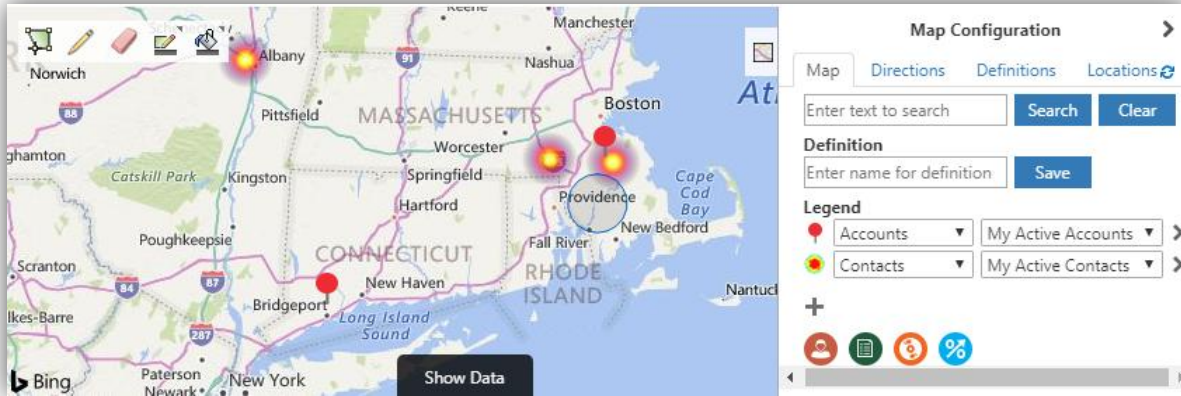


- For Example, if **“Account”** is selected with view of **“My Active Accounts”** then it will plot active accounts on map based on their location.
- Multiple legend can be added by clicking on **“Add”** icon.

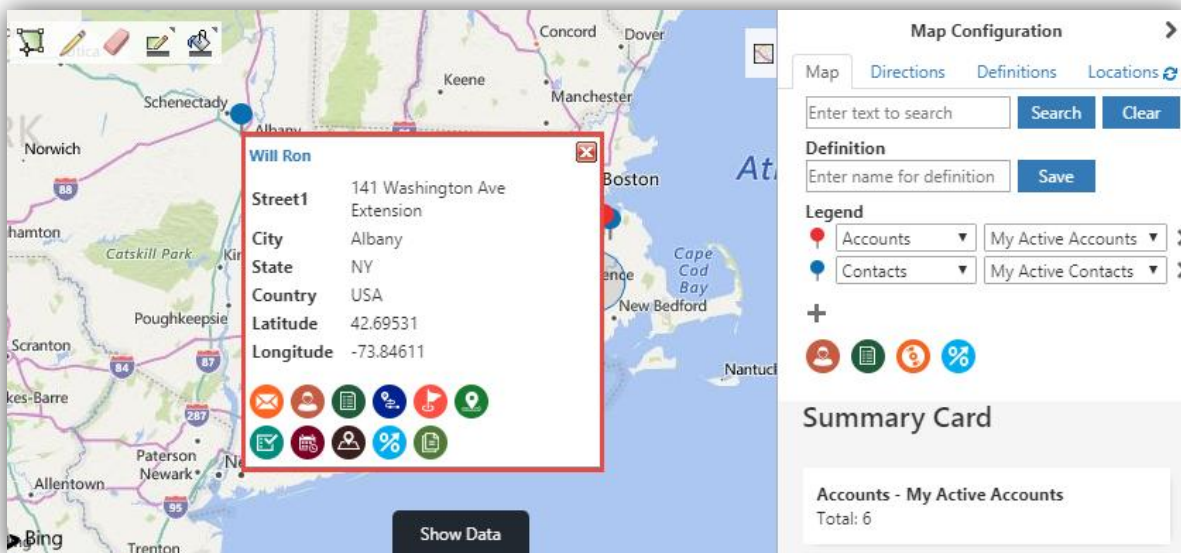


- Multiple pin options are also available to differentiate multiple legend records, options will be listed by clicking on existing pin.

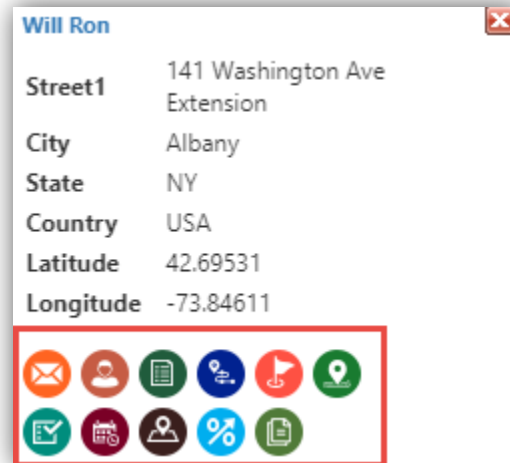
- Instead of pin you can also generate “Heat Map.”



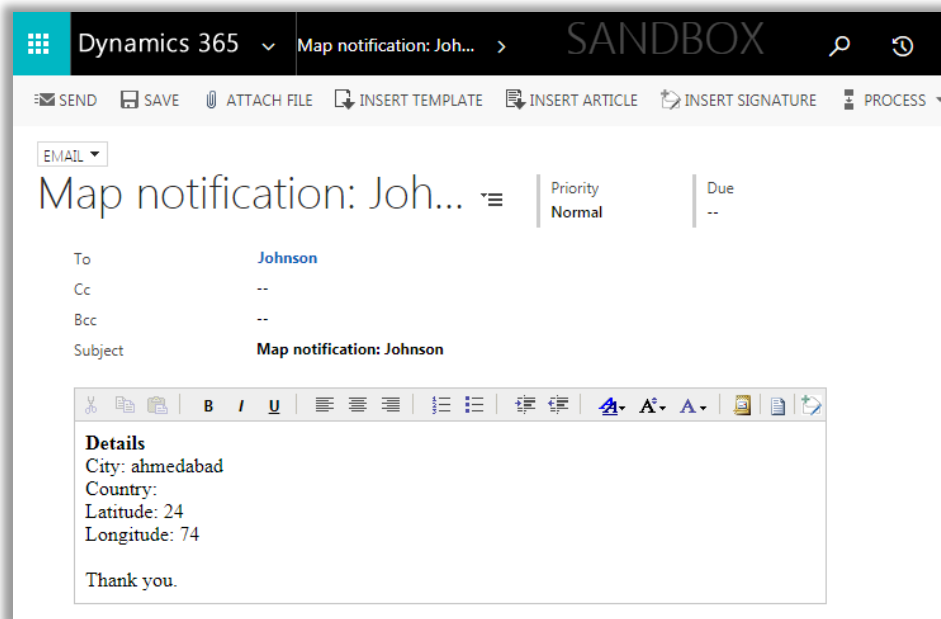
- Heat map will highlight the region where accounts are located.



- By clicking on particular pin, you will get details related to that record.
- Along with details there are eleven actions buttons available. They are:

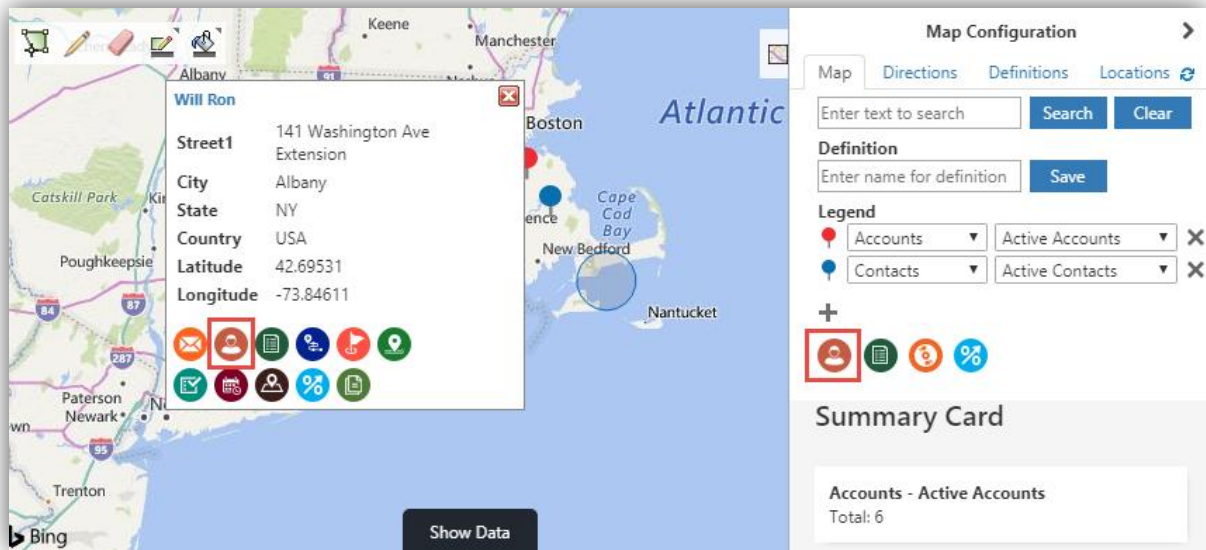


- **Send Email:**
 - To send email click on “Send Email” icon and it will set “To” and “From” address with email details.

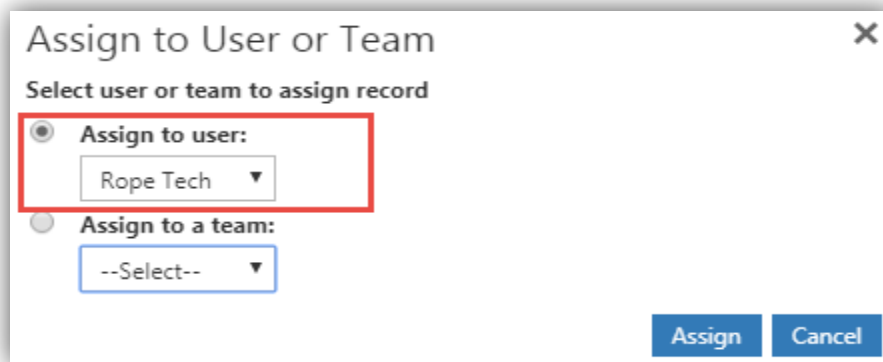


Note: If user to whom the mail is being sent doesn't has email address, mail won't be sent and error message stating that record doesn't has email address will be displayed.

- **Assign to User or Team:**



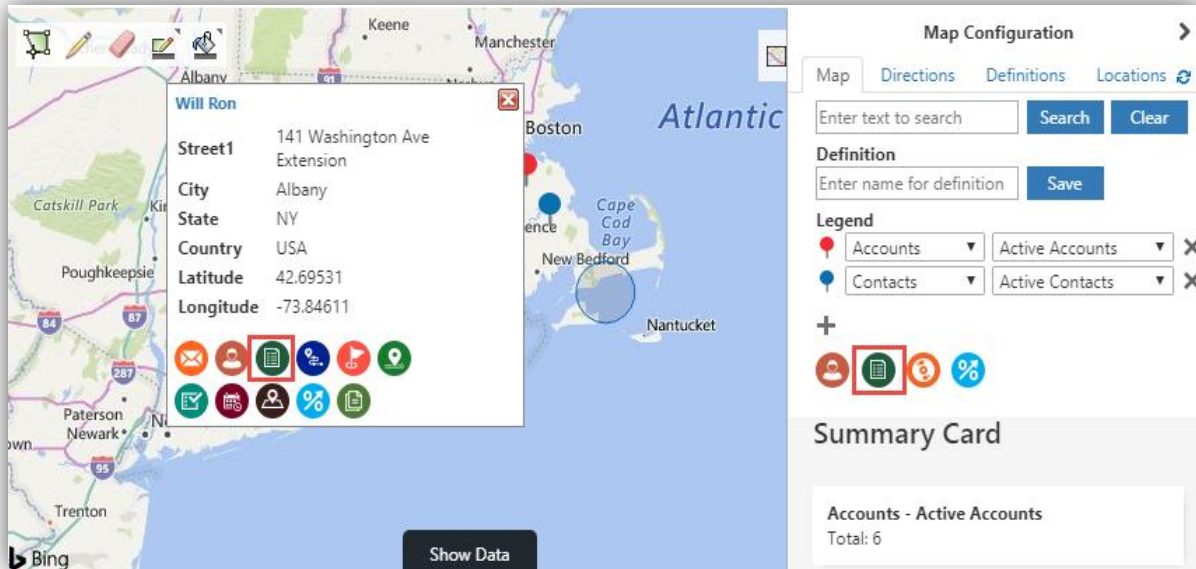
- You can assign any record to specific user or team by clicking on “Assign to user or team” icon under map section or by clicking on “Assign to user or team” icon from specific user’s details.
- Select “Assign to user” or “Assign to team” option and their related values.



Note: When assigning record to a team, that particular team should have role assigned to it.

- **Assign to Marketing List:**

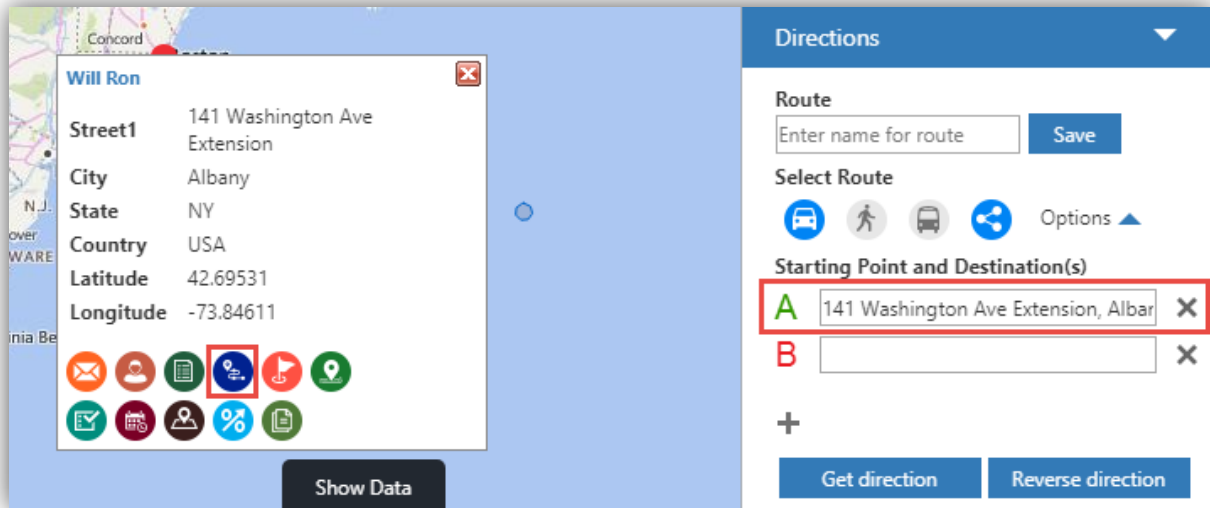
- You can assign any record to marketing list by clicking on “Assign to Marketing list” icon under map section or by clicking on “Assign to Marketing list” icon from specific user’s details.



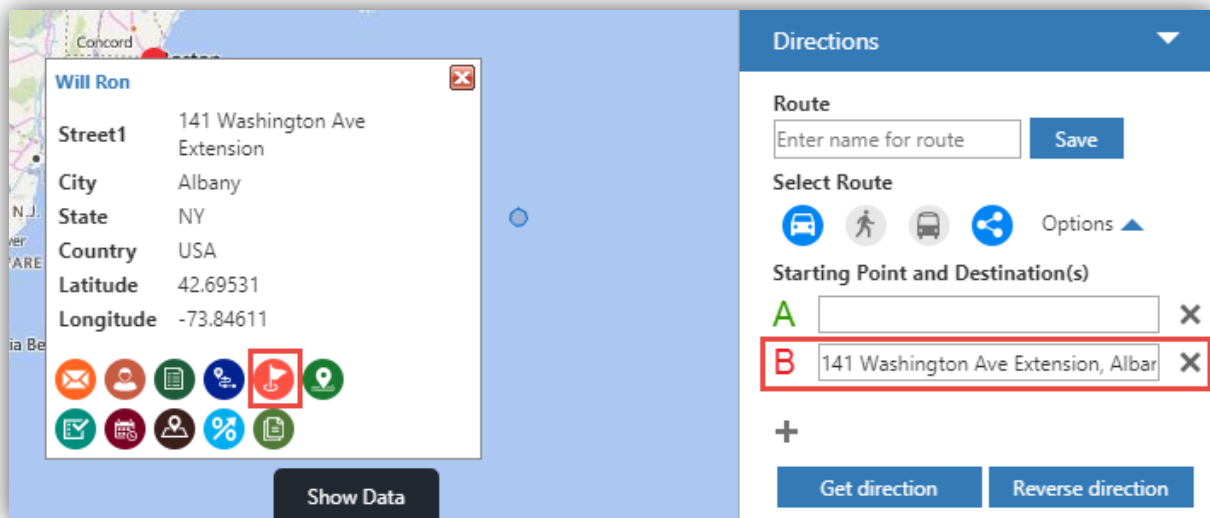
- On clicking, you will have option to add record either in existing marketing list or create the new one.

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

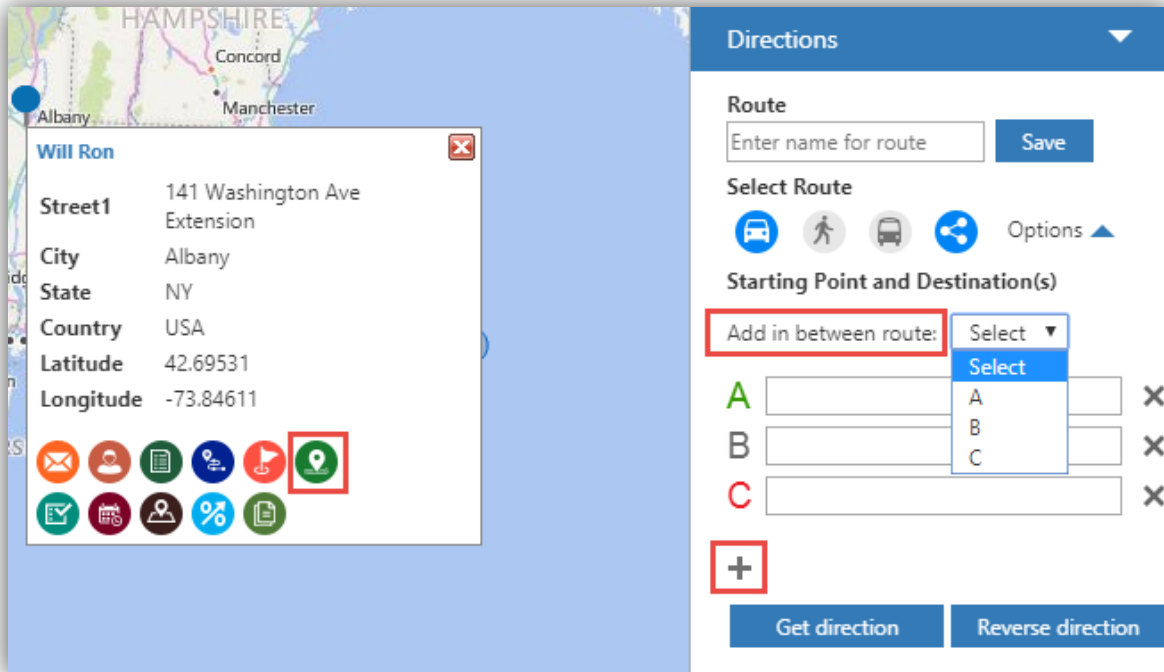
- **Set as Origin:**
 - By clicking on “**Set as Origin**” icon, address of particular record will be added as starting point of route under directions tab.



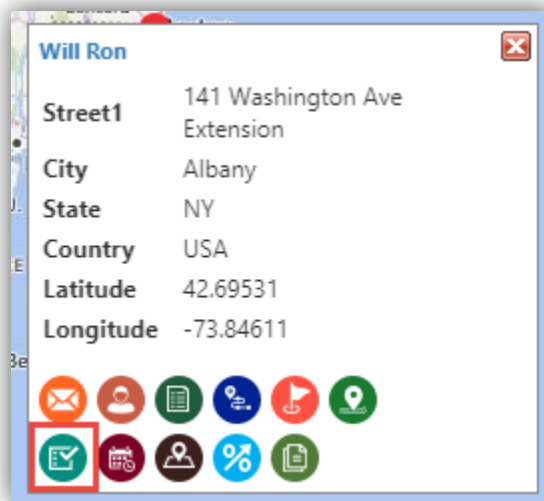
- **Set as Destination:**
 - By clicking on “**Set as destination**” icon, address of particular record will be added as last point of route under directions tab.



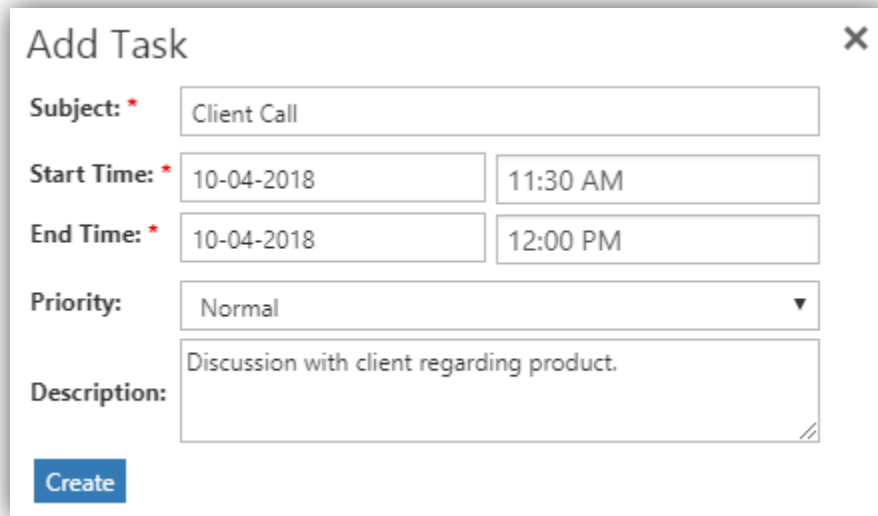
- **Add in Between Route:**
 - Clicking on “**Add in between route**” icon, address of particular record gets added to the user defined position in the route. It is between the origin and destination of route.



- To add record in between the route, you first have to add waypoint depending on your need. Then click on Add in between route icon and select the position from the drop down where you want to add that location in the route.
- **Add Task:**
 - You can add task for a record directly from map itself by clicking on “Add task” icon associated with particular record.
 - Any task can be added for a record along with their priority such as Low, Normal, and High.



- Any task can be added for a record along with their priority such as Low, Normal, and High.

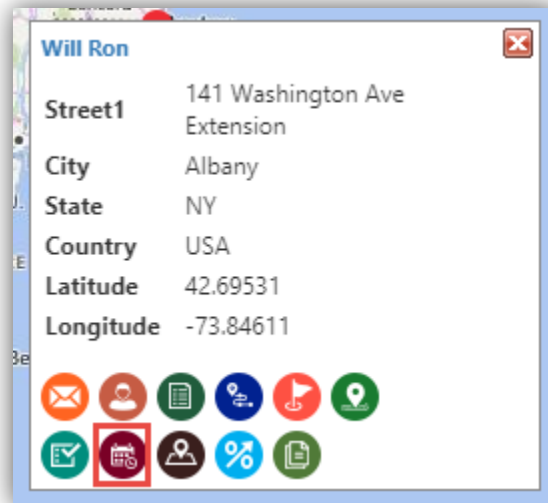


The 'Add Task' dialog box is shown with the following fields:

- Subject:** Client Call
- Start Time:** 10-04-2018, 11:30 AM
- End Time:** 10-04-2018, 12:00 PM
- Priority:** Normal
- Description:** Discussion with client regarding product.

A blue 'Create' button is located at the bottom left of the dialog.

- The task that is added can be viewed in detailed view of record in Dynamics CRM.
- Add Appointment:**
 - You can schedule an appointment for a record by clicking on “Add appointment” icon associated with particular record.

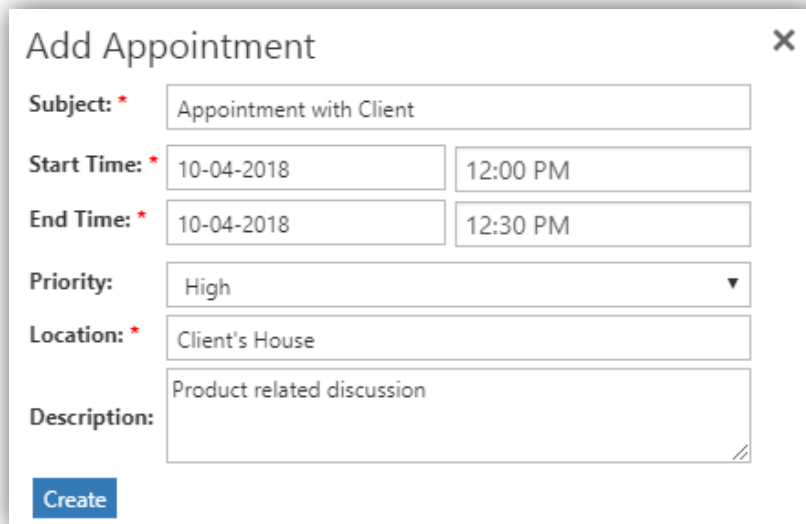


The screenshot shows a contact record for 'Will Ron' with the following details:

- Street1:** 141 Washington Ave Extension
- City:** Albany
- State:** NY
- Country:** USA
- Latitude:** 42.69531
- Longitude:** -73.84611

Below the address information is a row of icons. The 'Add appointment' icon, which is a calendar with a red 'X', is highlighted with a red square.

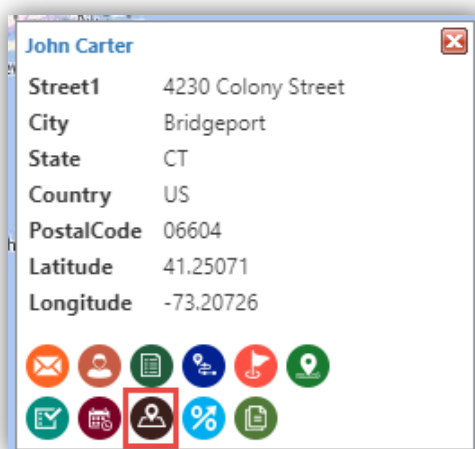
- Appointment can be added for a record along with their priority such as Low, Normal, and High.
- Along with priority, you can also enter the location of meeting.



The 'Add Appointment' dialog box contains the following fields:

- Subject:** Appointment with Client
- Start Time:** 10-04-2018, 12:00 PM
- End Time:** 10-04-2018, 12:30 PM
- Priority:** High
- Location:** Client's House
- Description:** Product related discussion
- Create** button

- The appointment that is added can be viewed in detailed view of record in Dynamics CRM.
- **Proximity Search:**
 - It lets you to view nearby records in proximity from current record based on time or distance.

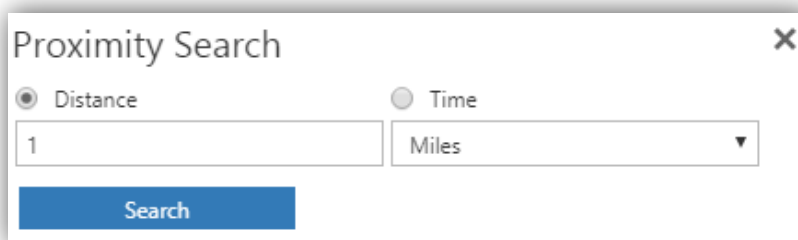


John Carter

Street1	4230 Colony Street
City	Bridgeport
State	CT
Country	US
PostalCode	06604
Latitude	41.25071
Longitude	-73.20726

Below the record card is a row of 12 circular icons. The icon representing a person (a silhouette) is highlighted with a red square.

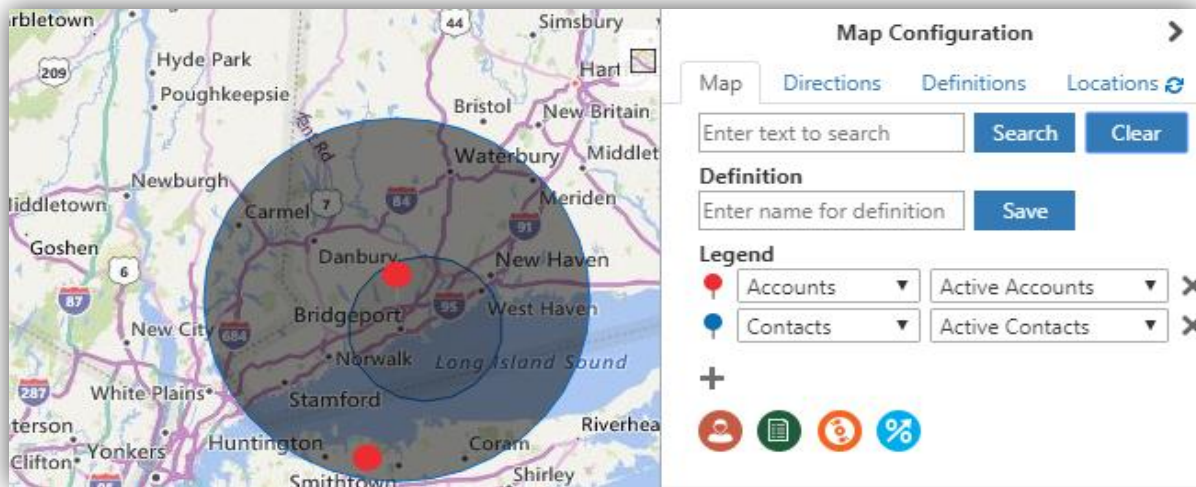
- You can define distance either in miles or kilometers as well as time in seconds.



The 'Proximity Search' dialog box contains the following elements:

- Distance** (selected) and **Time** radio buttons.
- 1** in the input field.
- Miles** in the dropdown menu.
- Search** button

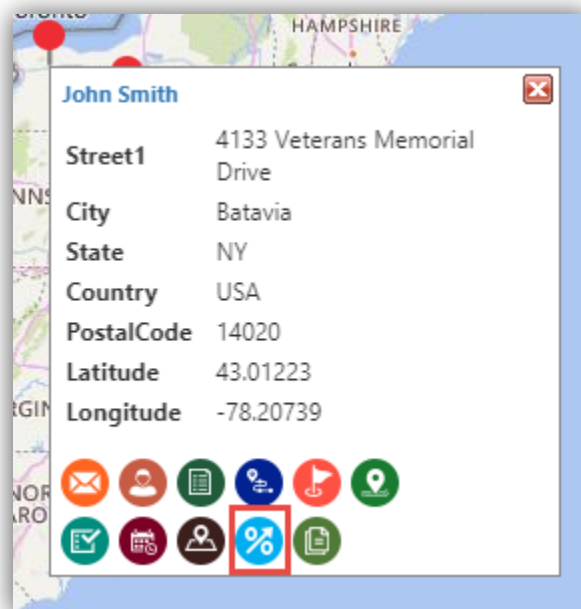
- Here on defining search criteria of 1 mile. It will plot records in 1 mile from location of current plotted pin.



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

- **Point of Interest:**

- You can search for nearby attractions, hotels, airports, restaurants, coffee shops, gas stations, etc. by clicking on POI icon.



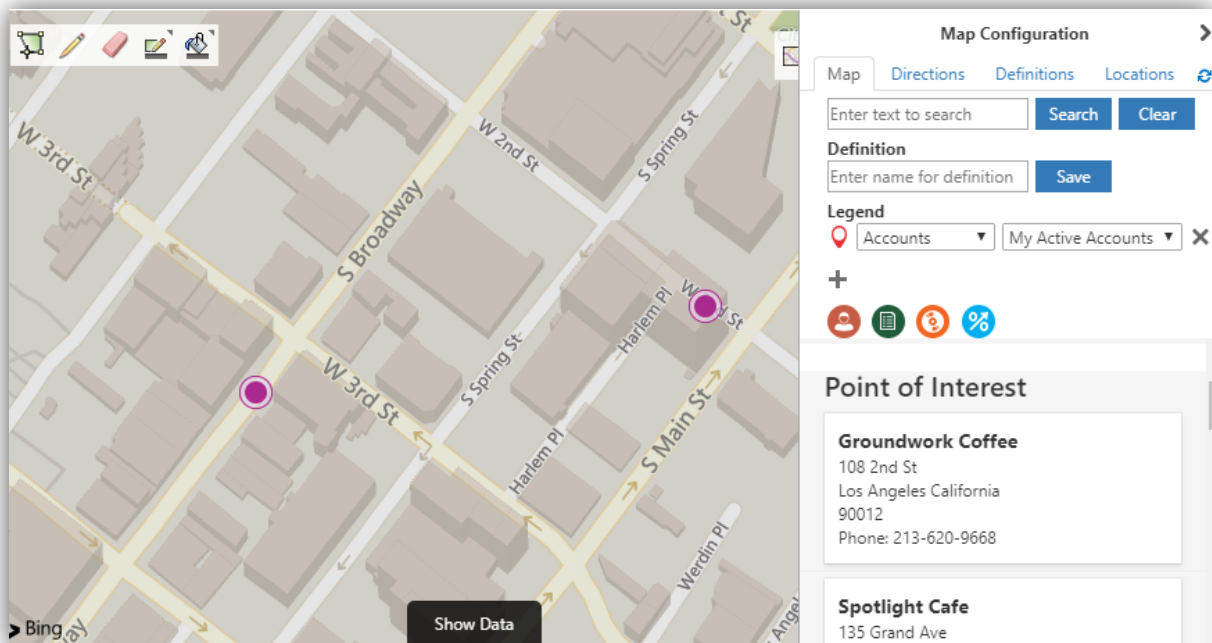
- Clicking on POI icon from particular pin, will take address of that particular record as POI location to search nearby places.

Point of Interest

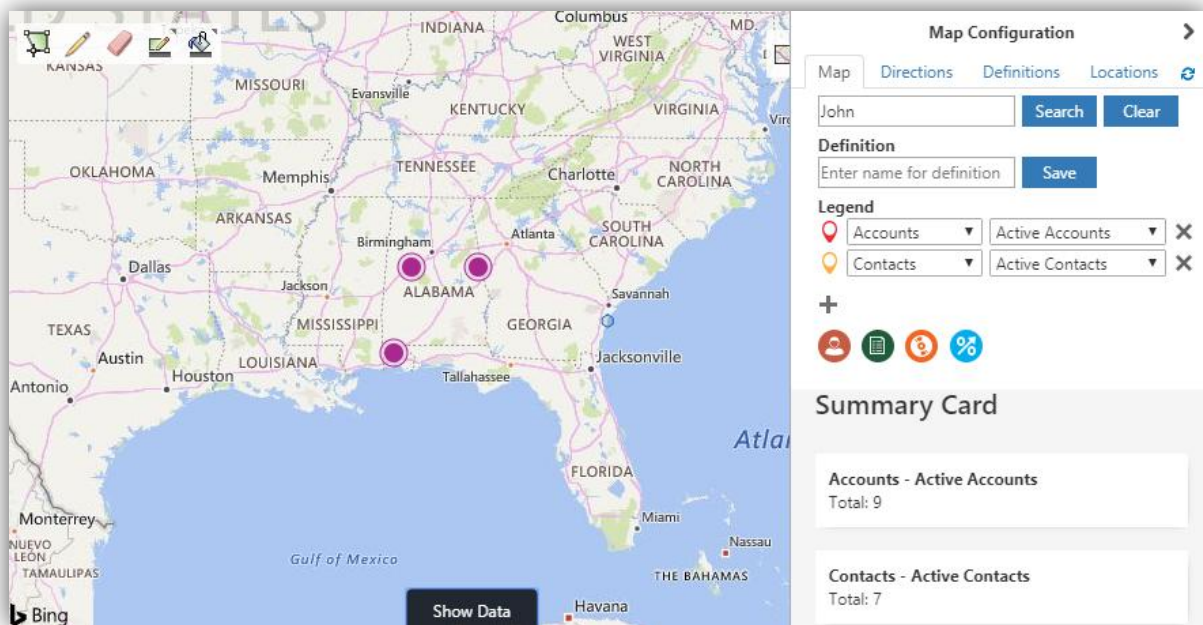
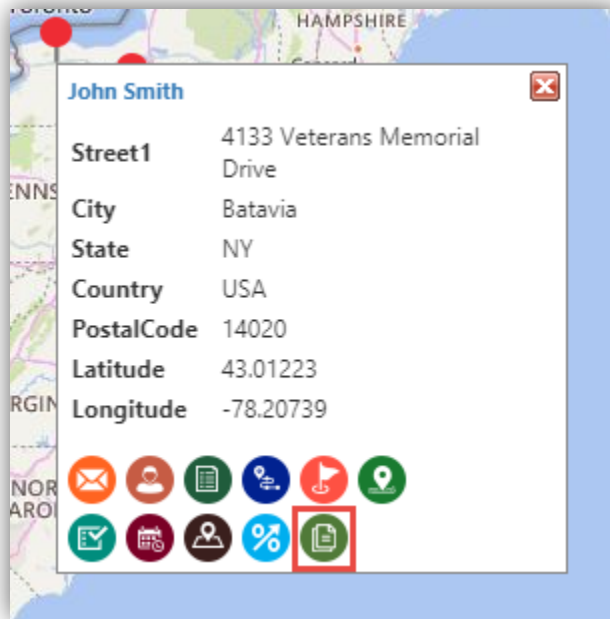
POI Location :

Batavia

- Clicking on POI under maps tab will let you search for locations from any location that you enter.



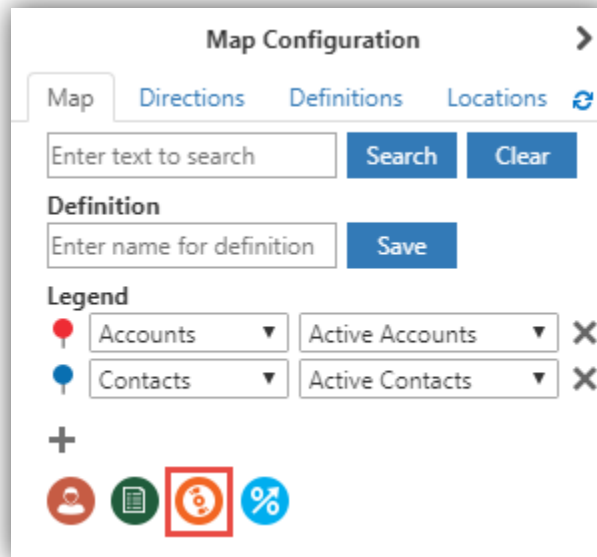
- **Related Records:**
 - By clicking on “**Related Records**” icon, all related records to the plotted record gets plotted on map.



- Here, as there are three contacts that are associated with the account, they are plotted on map.

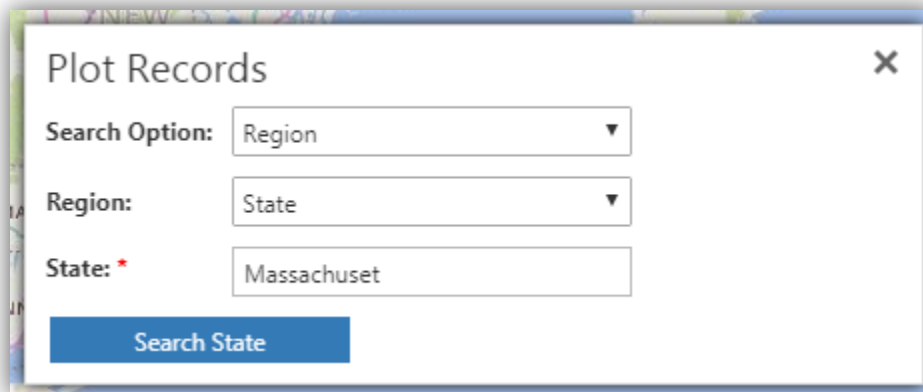
Plot Records

- By clicking on “**Plot records**” icon, you can plot records based on four different options. These options are:



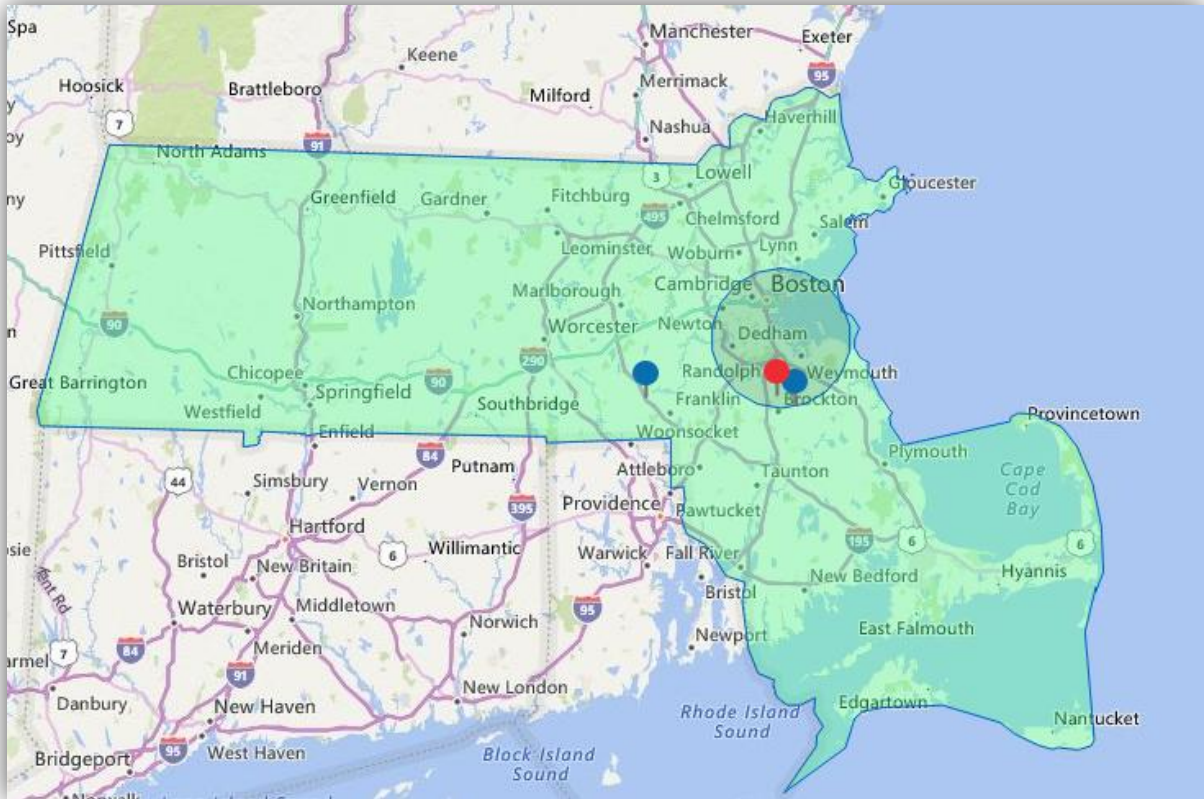
The image shows a 'Map Configuration' dialog box with four tabs: 'Map', 'Directions', 'Definitions', and 'Locations'. The 'Map' tab is active. It contains a search bar with the placeholder 'Enter text to search', a 'Search' button, and a 'Clear' button. Below the search bar is a 'Definition' section with a text input 'Enter name for definition' and a 'Save' button. The 'Legend' section has two entries: 'Accounts' with a red pin icon and 'Active Accounts' with a dropdown arrow, and 'Contacts' with a blue pin icon and 'Active Contacts' with a dropdown arrow. At the bottom, there is a plus sign and four circular icons: a red person icon, a green document icon, an orange location pin icon (which is highlighted with a red square), and a blue percentage icon.

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



The image shows a 'Plot Records' dialog box with a close button (X) in the top right corner. It contains three dropdown menus: 'Search Option:' with 'Region' selected, 'Region:' with 'State' selected, and 'State:' with 'Massachuset' entered. Below these fields is a blue button labeled 'Search State'.

- Here on selecting region type to be state, whole state gets highlighted on map along with plotted pins that come under that state.

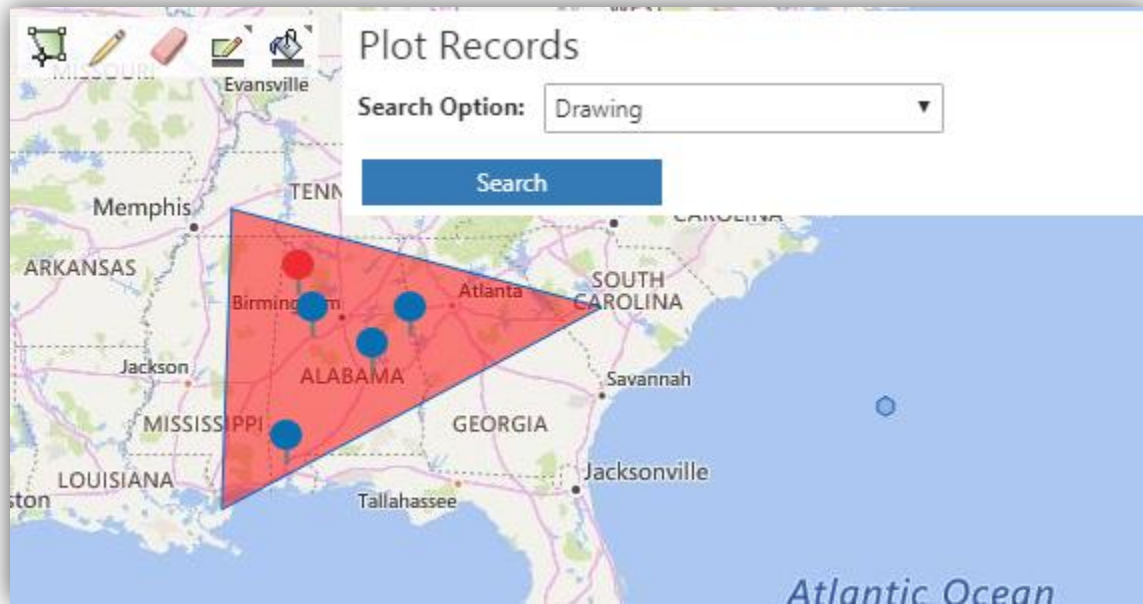


- **By Drawing:**

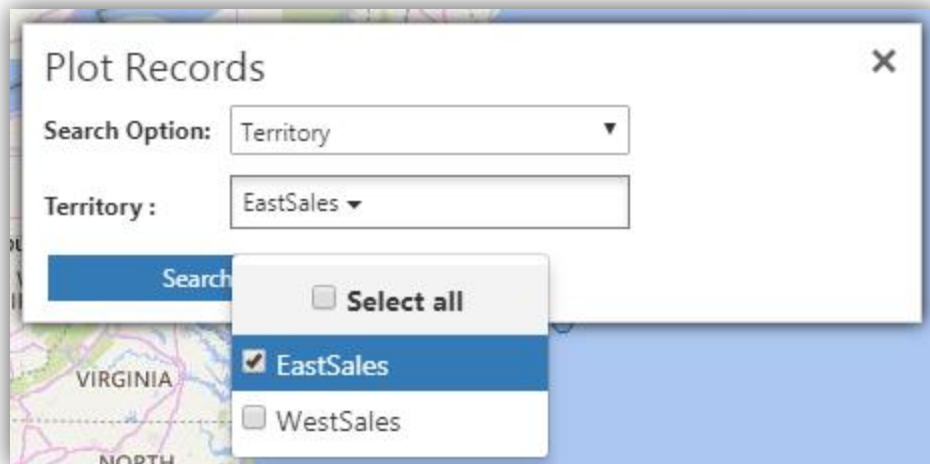
- This option lets you plot details based on different shapes as drawn by you. For drawing, drawing tool is used.



- In order to plot records based on drawing first draw desired shape on map and then click plot records icons, select by drawing from the dropdown and click on Search button.



- **By Territory:**
 - You can also view records on maps based on territory you wish to view for. In order to view records based on territory, you first need to select territory. At a time, you can select multiple territories.



- On clicking Search, all records that fall under selected territory will be plotted on map.



Note: In order to select territory, territories must be defined by you along with their territory manager in CRM. To manage territories, follow these steps: **Settings > Business Management > Sales Territories**

- **By Proximity:**
 - It lets you view nearby records in proximity from current location based on time or distance. You can define distance either in miles or kilometers as well as time in seconds.

Data Grid

Data grid provides listing of records which are plotted on the map. To view data grid, click on **“Show Data”** tab and you can view it and also perform multiple actions like add to route, change owner, add task, add appointment, send mail and manage territory.

Select Filter Type : And ▼

Search:

Select	Entity Name	Name ↑↓	Street1 ↑↓	Street2 ↑↓	City ↑↓	State ↑↓	Country ↑↓	Postal Code	Latitude ↑↓	Longitude	View
<input type="checkbox"/>	Account	Blue Yonder Airlines	9068 Muir Road		Los Angeles	KA	U.S.	20593	34.1757	-118.66066	
<input type="checkbox"/>	Account	Fourth Coffee	5009 Orange Street		Renton	TX	U.S.	20175	26.30063	-98.21784	
<input type="checkbox"/>	Account	John Carter	4230 Colony Street		Bridgeport	CT	US	06604	41.25071	-73.20726	
<input type="checkbox"/>	Account	Litware, Inc.	100 Red Oak Lane		Dallas	TX	U.S.	20313	33.01357	-97.05868	
<input type="checkbox"/>	Account	Marvik TEch	30 Memorial Drive		Avon	MA	USA		42.12104	-71.03009	

Showing 1 to 5 of 14 entries

1
2
3
Next

- **Copy:** By clicking on Copy button, all or selected records are copied onto the clipboard to be pasted anywhere you want.
- **Excel:** Clicking on excel button, downloads all or selected records that are available in data grid in xlsx file format.
- **PDF:** Clicking on pdf button, all or selected records present in grid are downloaded in PDF file format.
- **Print:** Print button helps you to take print of selected or all records present in data grid.
- Clicking on view icon, particular record is opened in CRM.

Select Filter Type: **And**

Copy Excel PDF Print

Search:

Select	Entity Name	Name	Street1	Street2	City	State	Country	Postal Code	Latitude	Longitude	View
<input type="checkbox"/>	Account	Blue Yonder Airlines	9068 Muir Road		Los Angeles	KA	U.S.	20593	34.1757	-118.66066	
<input type="checkbox"/>	Account	Fourth Coffee	5009 Orange Street		Renton	TX	U.S.	20175	26.30063	-98.21784	
<input type="checkbox"/>	Account	Litware, Inc.	100 Red Oak Lane		Dallas	TX	U.S.	20313	33.01357	-97.05868	

Showing 1 to 3 of 3 entries

- Data filtration is also available for data present in grid. To get filtered data, first select the filter type. “And” and “Or” are the two filters available. Select the column for which filtration is to be done. To reset the filters applied, click on reset icon.
- Other actions like change owner, add task, add appointment, send email can also be performed by selecting records within the data grid.

Select Filter Type: **And**

Copy Excel PDF Print

Search:

Select	Entity Name	Name	Street1	Street2	City	State	Country	Postal Code	Latitude	Longitude	View
<input checked="" type="checkbox"/>	Account	Blue Yonder Airlines	9068 Muir Road		Los Angeles	KA	U.S.	20593	34.1757	-118.66066	
<input type="checkbox"/>	Account	Fourth Coffee	5009 Orange Street		Renton	TX	U.S.	20175	26.30063	-98.21784	
<input type="checkbox"/>	Account	Litware, Inc.	100 Red Oak Lane		Dallas	TX	U.S.	20313	33.01357	-97.05868	

Map Directions Definitions

Locations

Directions

Route

Enter name for route Save

Select Route

Starting Point and Destination(s)

A 9068 Muir Road, 20593, Los Angeles, CA

B

Get direction Reverse direction

- You can select a record and add address of that record to the route by clicking on Add to Route icon. Added address can be viewed under directions tab.

Select Filter Type : And ▼

Copy Excel PDF Print

Search:

Select	Entity Name	Name ↑↓	Street1↑↓	Street2↑↓	City ↑↓	State ↑↓	Country	Postal Code	Latitude	Longitude	View
<input checked="" type="checkbox"/>	Account	Blue Yonder Airlines	9068 Muir Road		Los Angeles	KA	U.S.	20593	34.1757	-118.66066	
<input checked="" type="checkbox"/>	Account	Fourth Coffee	5009 Orange Street		Renton	TX	U.S.	20175	26.30063	-98.21784	
<input type="checkbox"/>	Account	Litware, Inc.	100 Red Oak Lane		Dallas	TX	U.S.	20313	33.01357	-97.05868	

Account Name Street1 Street2 City State U.S Postal cod Latitud Longitud

Showing 1 to 3 of 3 entries 2 rows selected

1

- You can directly add selected or all records to the territory using the “**Manage Territory**” icon.

Manage Territory

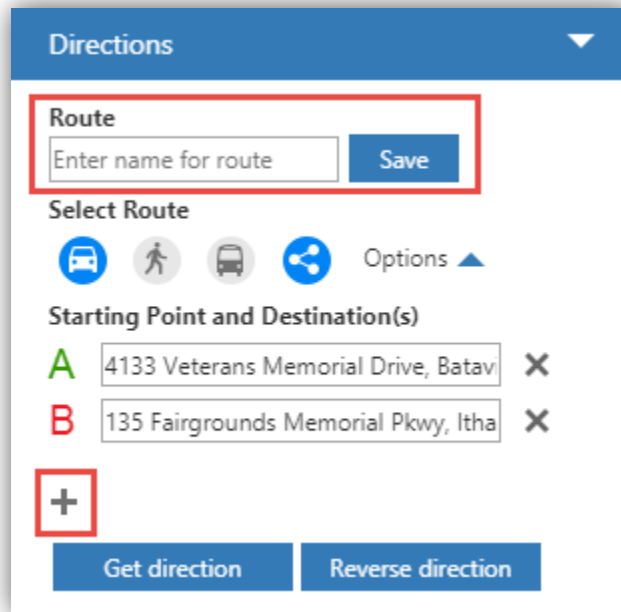
Territory: EastSales ▼

Save

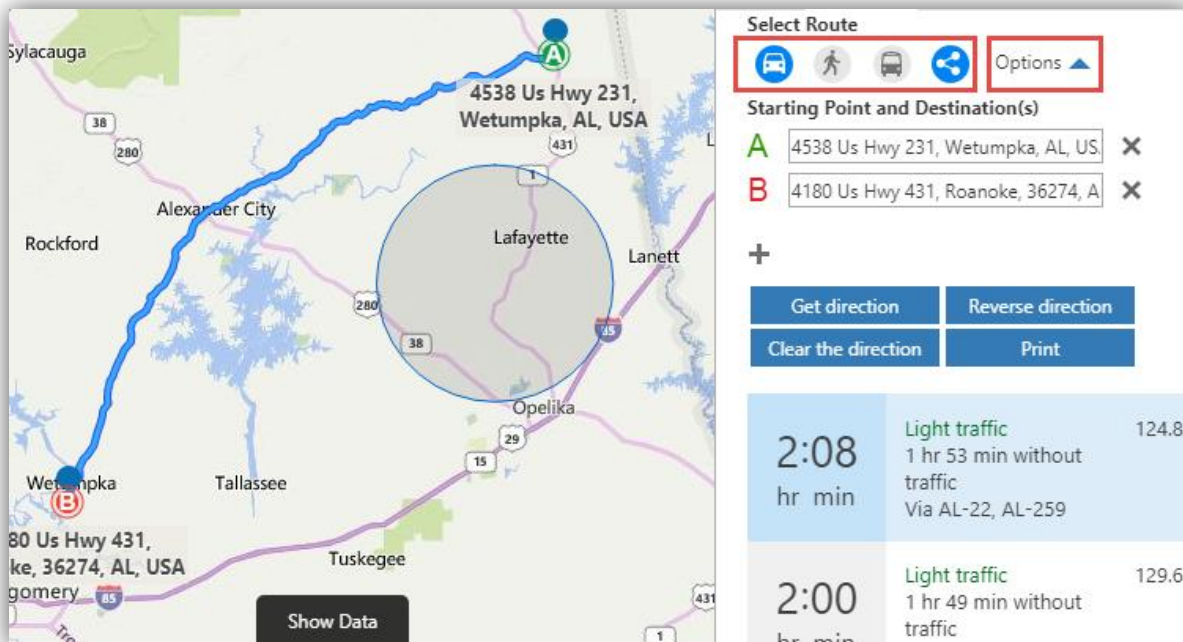
Note: To perform any action from data grid, it is mandatory to select at least one record.

Directions

- From “**Directions**” you can get route from any location to your customer’s location. Also, particular route can be saved for future reference.
- Navigate to directions tab and add the Starting and Destination point.



- Click on “**Add icon**” to add multiple way points.
- Once you have added the points click on “**Get Direction**” button and you get the route details.
- By clicking on “**Reverse Direction**” button, you can reverse the directions.



- It will list all possible route and highlight the optimized route. Also, you can get directions based on means of transport like driving, walking and transit.
- You can also apply various filters on route by clicking on “**Option**” dropdown. Various filters available are Distance: Miles/KM, Directions: Shortest time/Shortest Distance, Avoid Highways, Avoid Toll Roads and Avoid Traffic.
- You can also share route in email using link.
- You will also have option to print the route by clicking on “**Print**” button, it will print the details of the route you have selected.

Route

- Under route section, you can view all saved routes. Also, actions such as preview and delete can be performed for a route.
- Routes can also be filtered based on Start date and End date.

Route

Saved Routes

Show 10 entries

Route Name	Action
Route1	

Showing 1 to 1 of 1 entries

1

Open Saved Routes

Select Start Date

07-04-2018

Select End Date

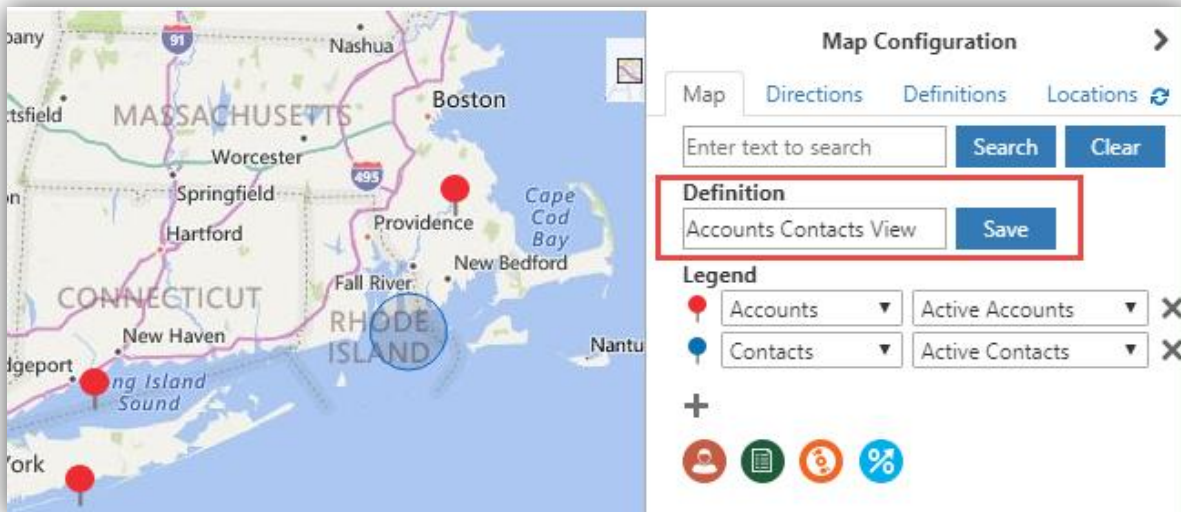
07-04-2018

Search

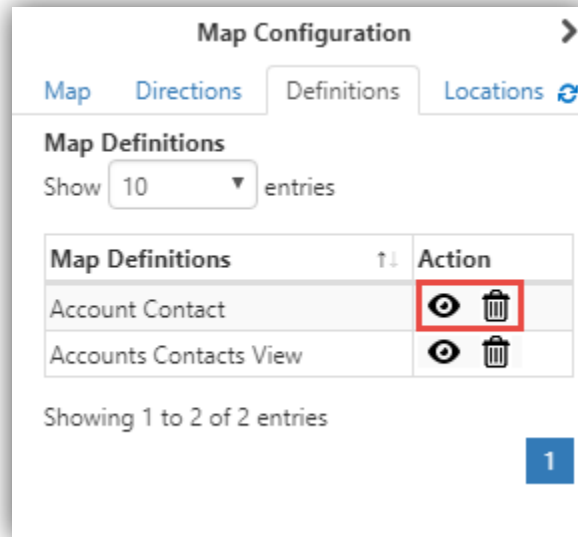
Clear

Definitions

- In definitions, save map configurations so that you can come back to them later and manipulate them according to requirement.



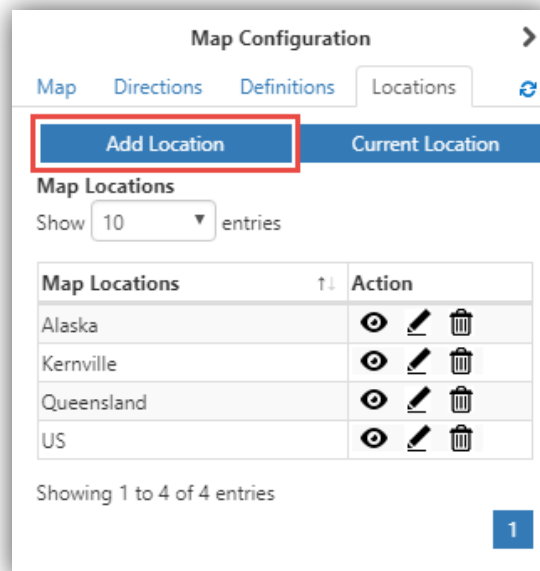
- From "Map" tab you can add any configuration name and upon saving, it will be saved as map definition under Definitions tab.



- You can also “Edit” or “Delete” any definition from listing in definitions tab.

Locations

- In locations user can save particular region, so that later they can come back when required.
- For adding location, navigate to Locations tab.



- Click on “Add Location” button to add new location.

Add New Location

You can save the map's current center and zoom level to easily return to them later.

Center (41.4016491114044, -71.17508957076762)

Zoom level

Location Name*

Save Close

- Select zoom level and enter location name and click on **“Save”** button to add location.

Map Configuration

Map Directions Definitions Locations

Add Location Current Location

Map Locations

Show entries

Map Locations	Action
Alaska	
Kernville	
Queensland	
US	

Showing 1 to 4 of 4 entries

1

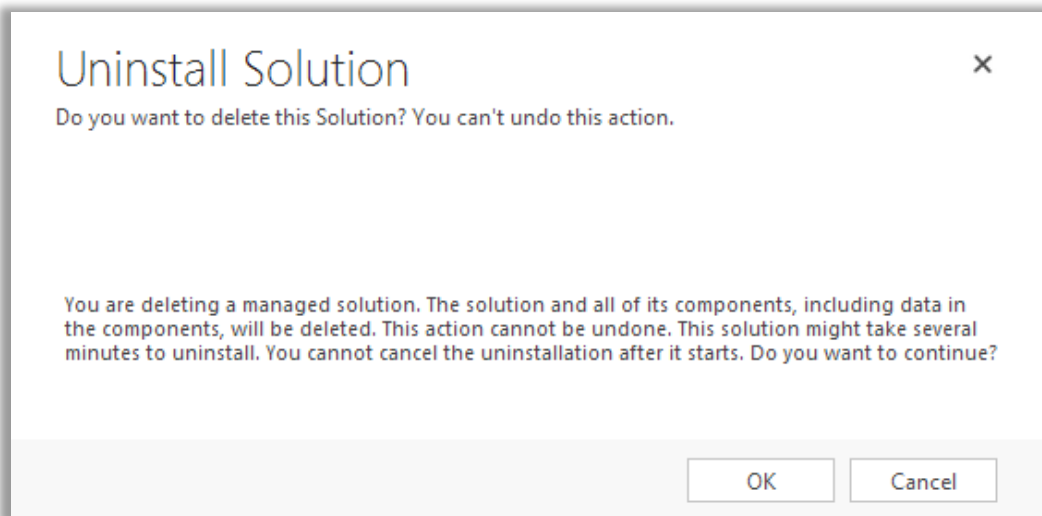
- You can also view, edit or delete location from action tab in location listing.
- By clicking on current location button, you can know your current location.

Uninstallation Steps

- To uninstall the Solution, navigate to **Settings** - > **Solutions**.
- Check on the Plugin Name and click on '**Delete.**'



- Click on '**OK**' to Delete and uninstall the solution from CRM.



Contact Us

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



Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.appjetty.com/dynamicscrm-quick-maps.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 Quick Maps**, please write to sales@appjetty.com