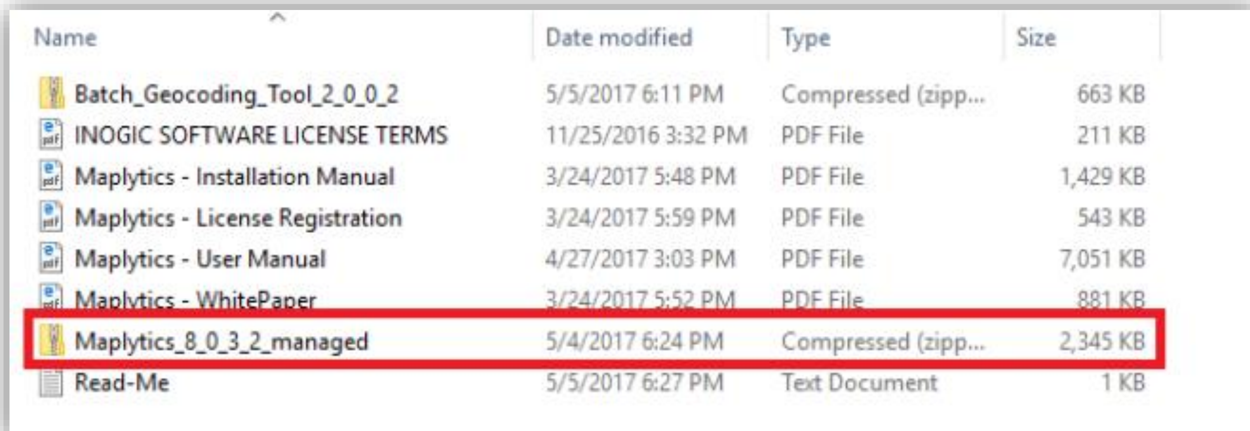
MAPLYTICS™ – Installation Manual

Contents

Note: You need to have the System Administrator Role assigned to you in CRM to complete the installation steps explained below.

Solution Import:

Please import the Maplytics Managed solution that was included in the archived file sent to you. Extract the folder, and you will find Managed Solution file as shown below:

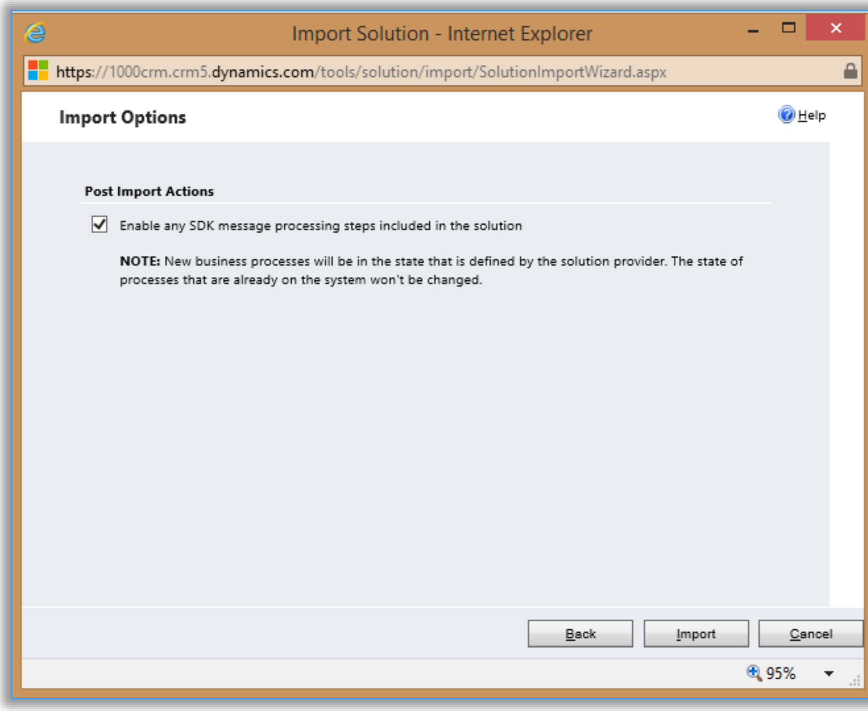


Name	Date modified	Type	Size
Batch_Geocoding_Tool_2_0_0_2	5/5/2017 6:11 PM	Compressed (zipp...	663 KB
INOGIC SOFTWARE LICENSE TERMS	11/25/2016 3:32 PM	PDF File	211 KB
Maplytics - Installation Manual	3/24/2017 5:48 PM	PDF File	1,429 KB
Maplytics - License Registration	3/24/2017 5:59 PM	PDF File	543 KB
Maplytics - User Manual	4/27/2017 3:03 PM	PDF File	7,051 KB
Maplytics - WhitePaper	3/24/2017 5:52 PM	PDF File	881 KB
Maplytics_8_0_3_2_managed	5/4/2017 6:24 PM	Compressed (zipp...	2,345 KB
Read-Me	5/5/2017 6:27 PM	Text Document	1 KB

The file name can vary depending on the CRM version:

- Dynamics 365 / CRM 2016 – Maplytics_8_0_x_x_managed
- CRM 2015 – Maplytics_7_0_x_x_managed
- CRM 2013 – Maplytics_6_0_x_x_managed

While importing the Solution, please check the ***'Enable any SDK'*** message as shown in the below screenshot;



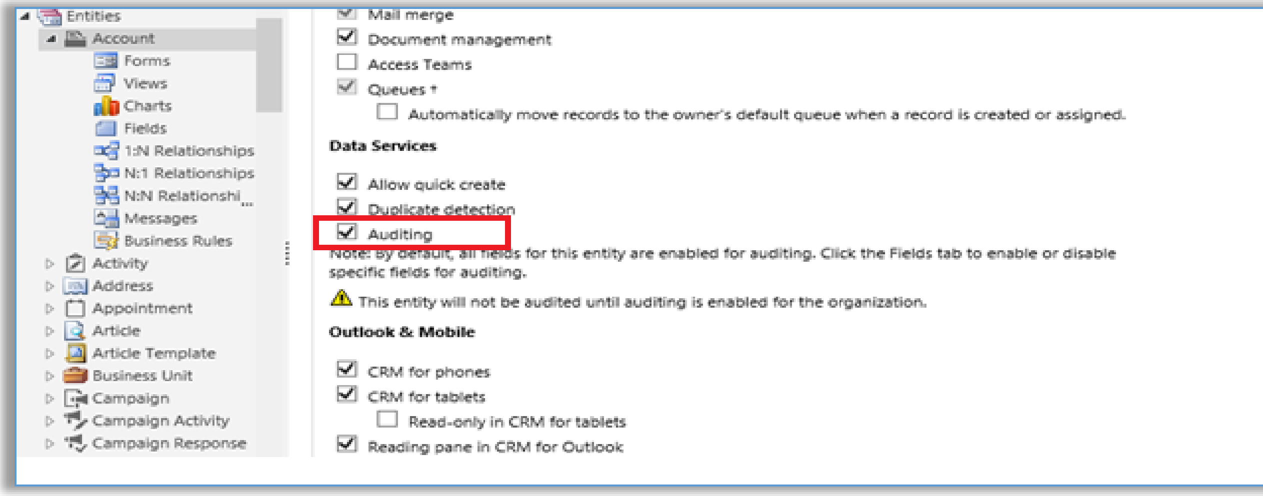
You need to complete the configuration and license registration before you can proceed with Maplytics.

Note:

CRM 2013 and CRM 2015:

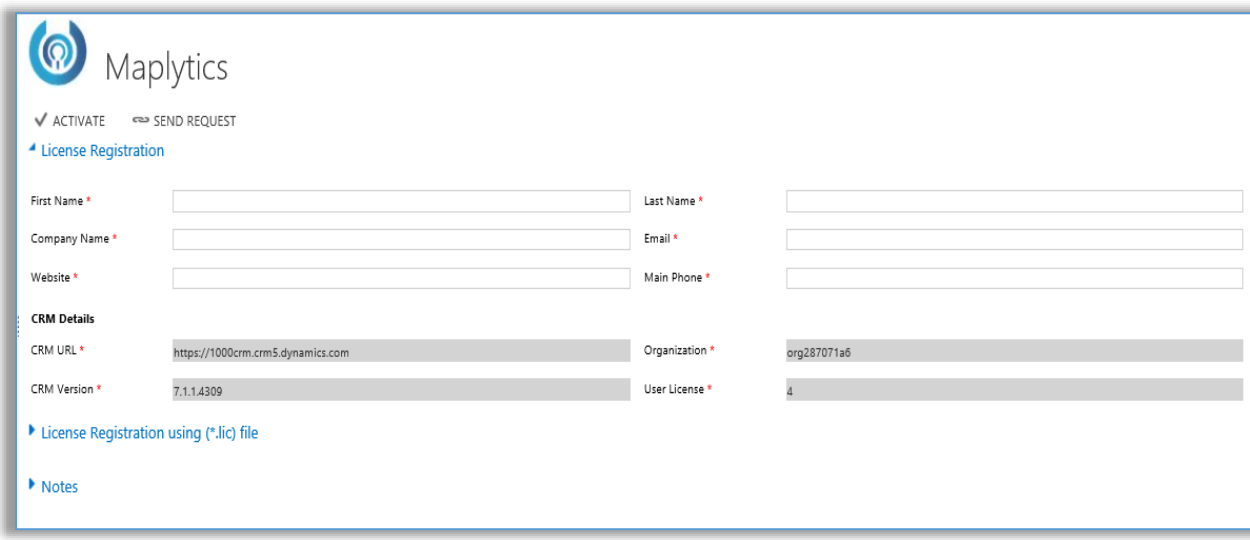
When we create a solution, we use the vanilla box of CRM. After importing Maplytics solution, all entity level properties of Account/Contact/Lead are overridden. So after installation, you have to set those properties manually. The example would be auditing, if you have turned on the auditing then it will turn off after importing Maplytics solution. So you have to turn it on manually.

CRM 2016 and above: *Entity-level properties will remain the same as before importing the solution.*



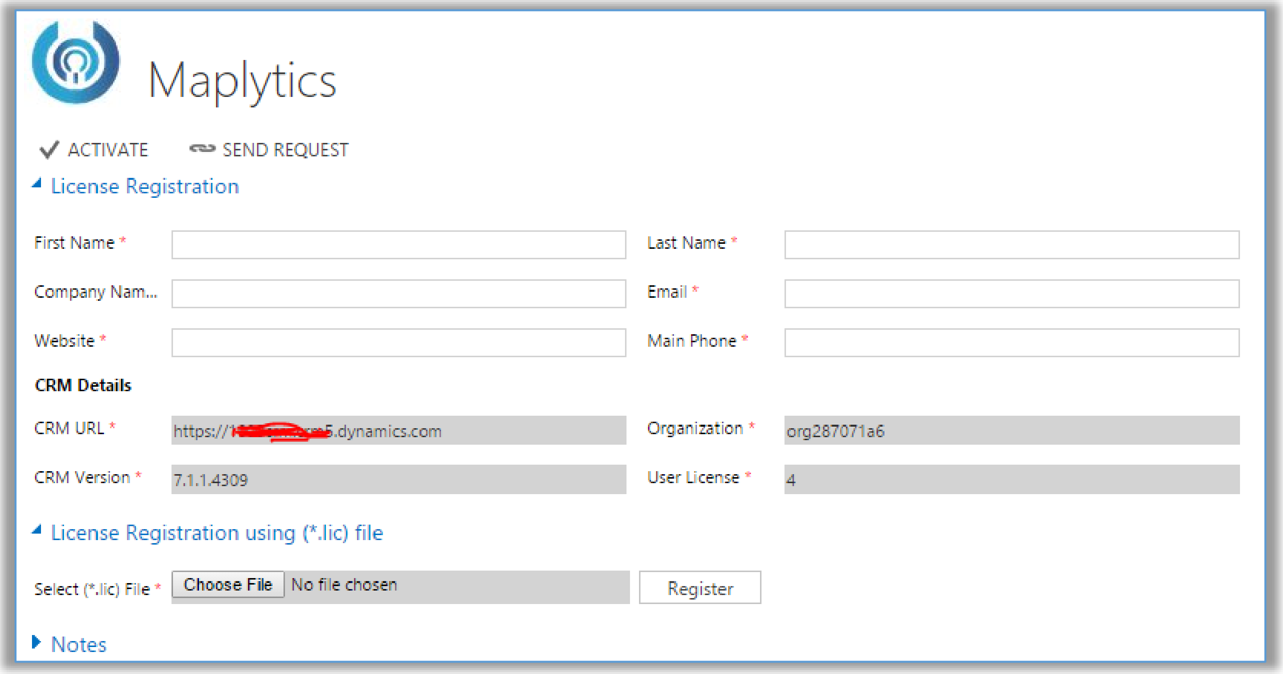
Maplytics License, Configuration details and Entity Map & Dashboard Details Installation

1. Navigate to ***Settings -> Solutions -> Select the Maplytics solution*** to complete Maplytics configuration using the Configuration section of the solution.

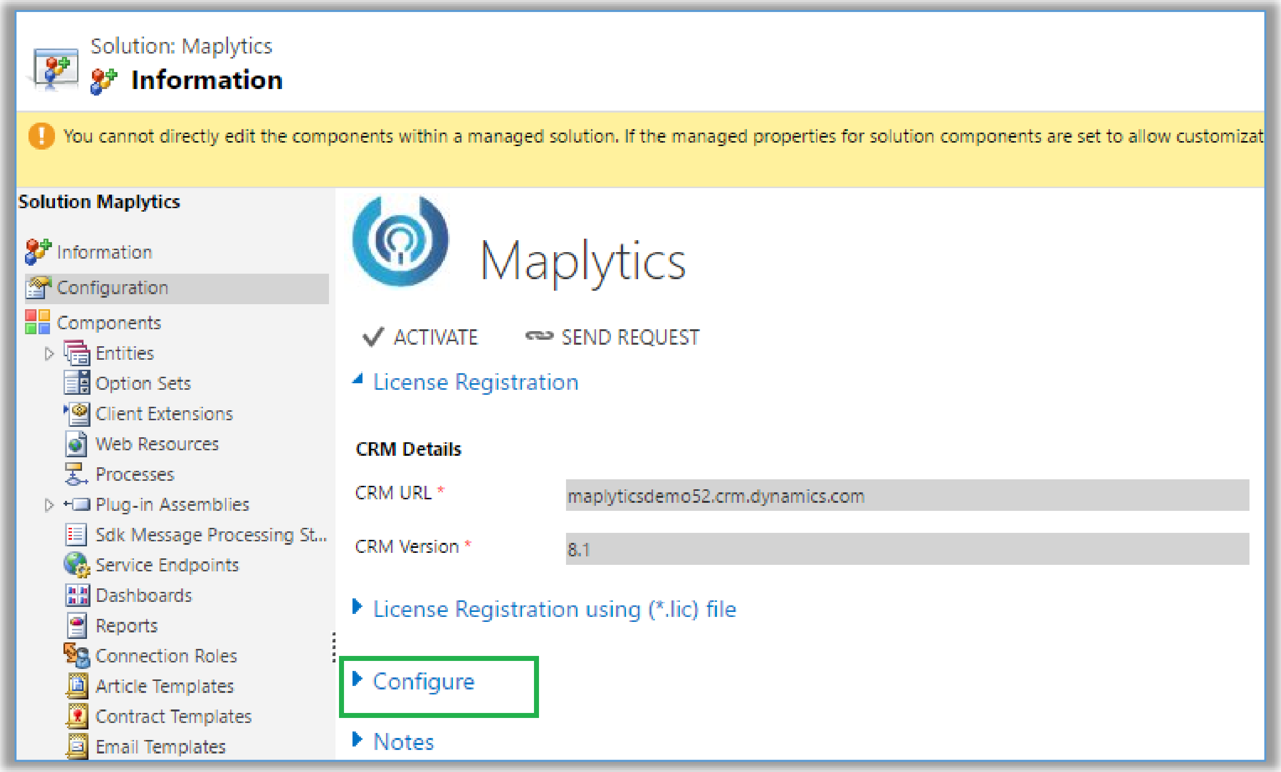


For trial version, fill up the data in the ***License Registration*** section and click on the ***'ACTIVATE'*** button, which will activate the product license for 15 days. In the case of purchase or to extend the trial, click on the ***'SEND REQUEST'*** button, which will send an email to us with the details entered in the ***License Registration section.*** Once the request has been processed, you will receive an email from our end, and then you can click on the ***'ACTIVATE'*** button to activate/extend the license.

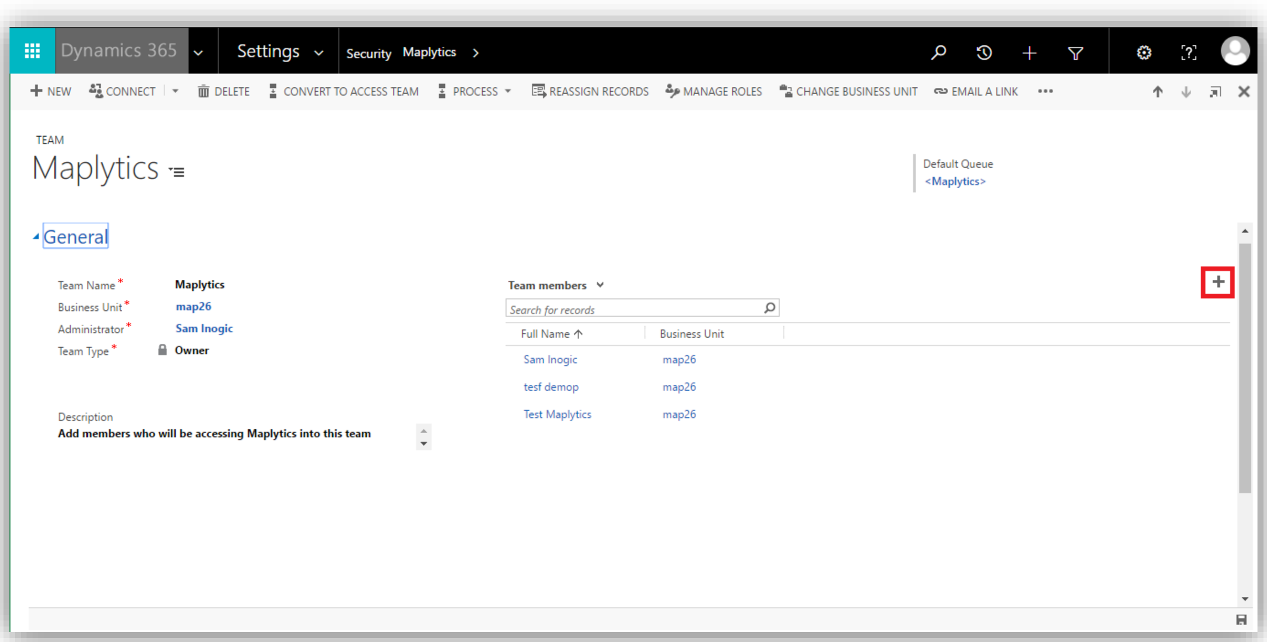
In case you are not able to activate the license using the ‘***Activate’*** button, then we have provided an alternate option. In that case, we will provide you a license file which you can browse from the ***‘License Registration using (*.lic) file’*** and click on the ‘***Register’*** button to activate the license.



2. To install the sample Dashboards and Entity Map records click on the **Configure** button.



3. Upon successful completion, it will open a tab with Team Maplytics created. The user needs to add required Member to the Team as shown below;



Note: We're auto assigning 'Maplytics User' role to Team 'Maplytics'.

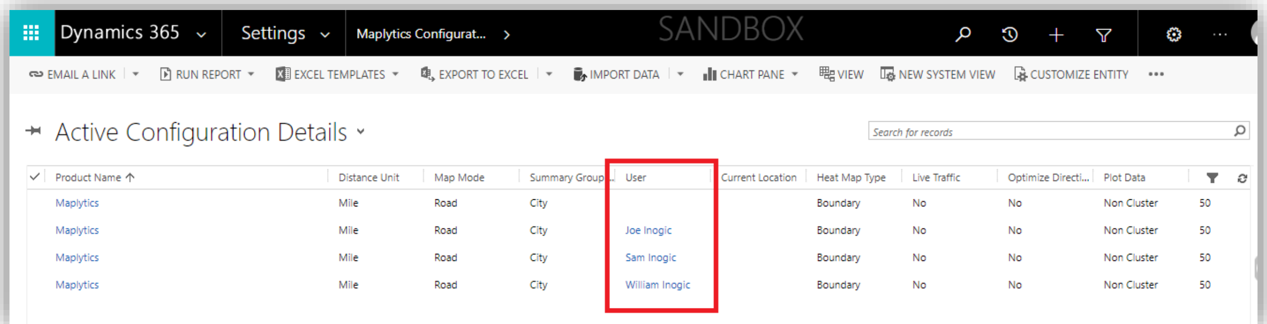
4. To customize Maplytics, please make sure to assign 'Maplytics Admin' security role to the required member. Please find the below-mentioned description of Maplytics' s security roles:

   Maplytics Admin: Assign this security role to Administrator/s of Maplytics where they can have access to all custom entities specific to Maplytics like entity map, etc. Admin role should be assigned to an individual who would be involved in configuring and creating Entity Maps and Dashboards for Maplytics.

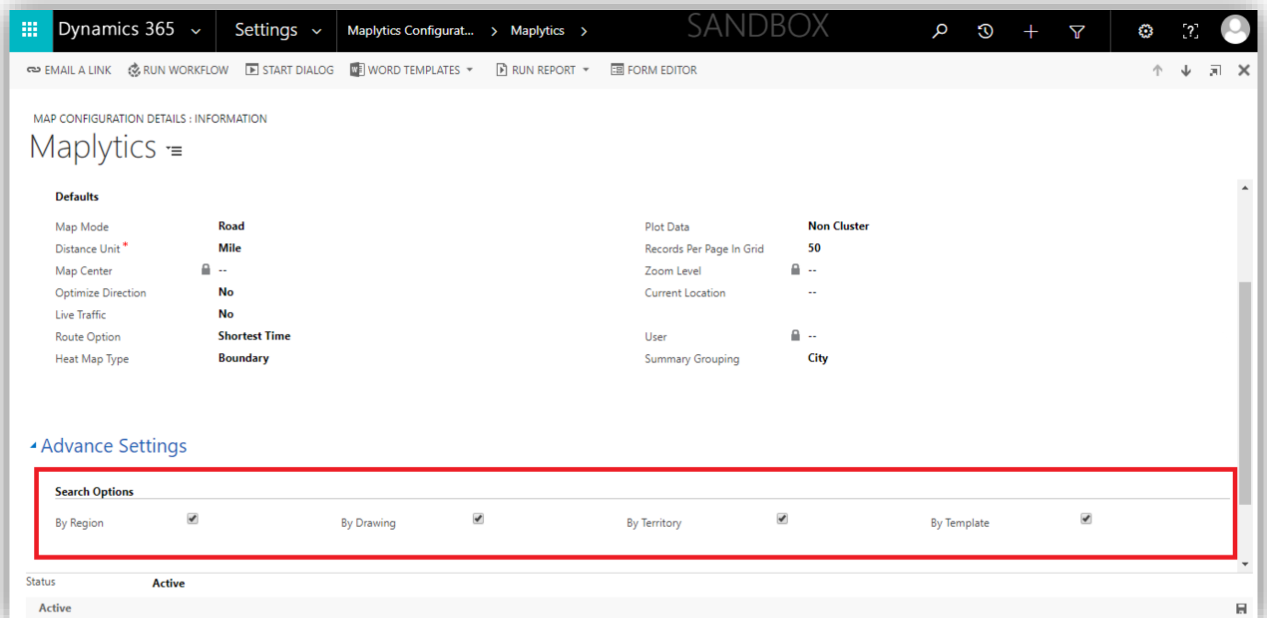
   Maplytics Users: Assign this security role to all other users who would be only using Maplytics.

Maplytics Configuration Details (Personalization):

Maplytics configuration record will be created for each member of Team Maplytics and one default record where no user will be assigned. Go to ***Setting > Maplytics Configuration Details***

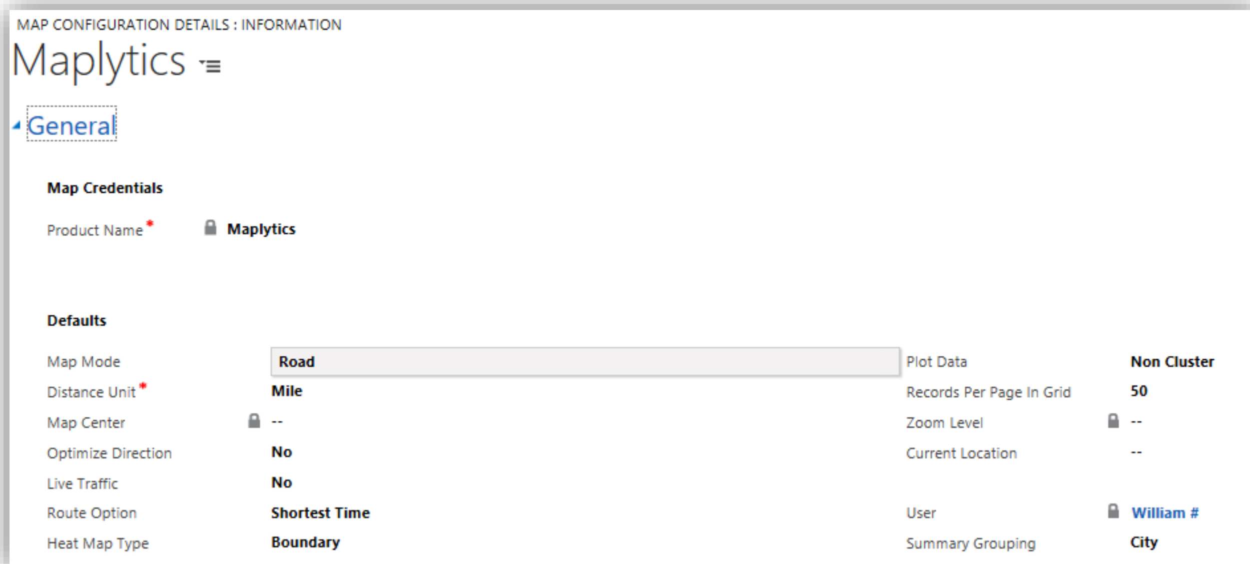


Open the default record and navigate to ***Advanced Settings***. Here, the Maplytics Admin can configure the ***'Search Option'*** for the whole organization. Admin can enable/disable the search options from here.



Note: "By Location" option is selected as the default option. The user has the option to choose among other four: By Region, By Drawing, By Territory and By Template. It is recommended to keep all the options enabled.

For user level configuration, open the selected user record and modify the setting as shown below;



<u>**Map Mode:**</u> This provides the option to load Bing Maps in default mode. Options are ***Aerial and Road*****.**

<u>**Plot Data:**</u> This helps the user to define the default plotting of data. The user can choose from the following options;

- **Cluster:** This will group nearby data
- **Non-Cluster:** This will plot CRM data as individual pushpin

<u>**Distance Unit:**</u> The user can select the default option for distance measuring. Options are ***Miles and Kilometers.***

<u>**Records Per Page In Grid:**</u> The user can select the number of records to be visible in Maplytics ***'View Data'*** grid.

<u>**Zoom Level:**</u> This is set from the Detail Map screen using the ***'Set Zoom Level and Map Center'*** option from the contextual menu, i.e., right click on the map to access the contextual menu.

<u>**Map Center:**</u> This is set from the Detail Map screen using the ***'Set Zoom Level and Map Center'*** option from the contextual menu. Zoom Level and Map Center will define the default location to zoom when the Detail Map is opened.

<u>**Optimize Direction:**</u> This option will help the user to create an optimized route by default.

<u>**Current Location:**</u> The user can define the current default location using this option.

<u>**Live Traffic:**</u> The user can opt to see live traffic status as default when the route is created.

Route Option: The user can define the best way to determine a route, i.e., shortest time or shortest distance.

User: Name of the user to whom this record belongs to. This is a **‘Read-Only’** field.

Heat Map Type: This allows the user to select the default option for Heat Map. Options are ***‘Boundary’*** and ***‘No Boundary'.***

Summary Grouping: Default option for the region type.

Proxy URL: If you use Proxy servers for accessing the Internet on the CRM server, please provide the Proxy URL so that the application can perform calls to the Bing Maps site.

In case of the proxy setting, the plugins need to be registered out of the sandbox and by default the solutions provided by us register the plugins in Sandbox isolation mode. You can find these steps towards the end of this manual.

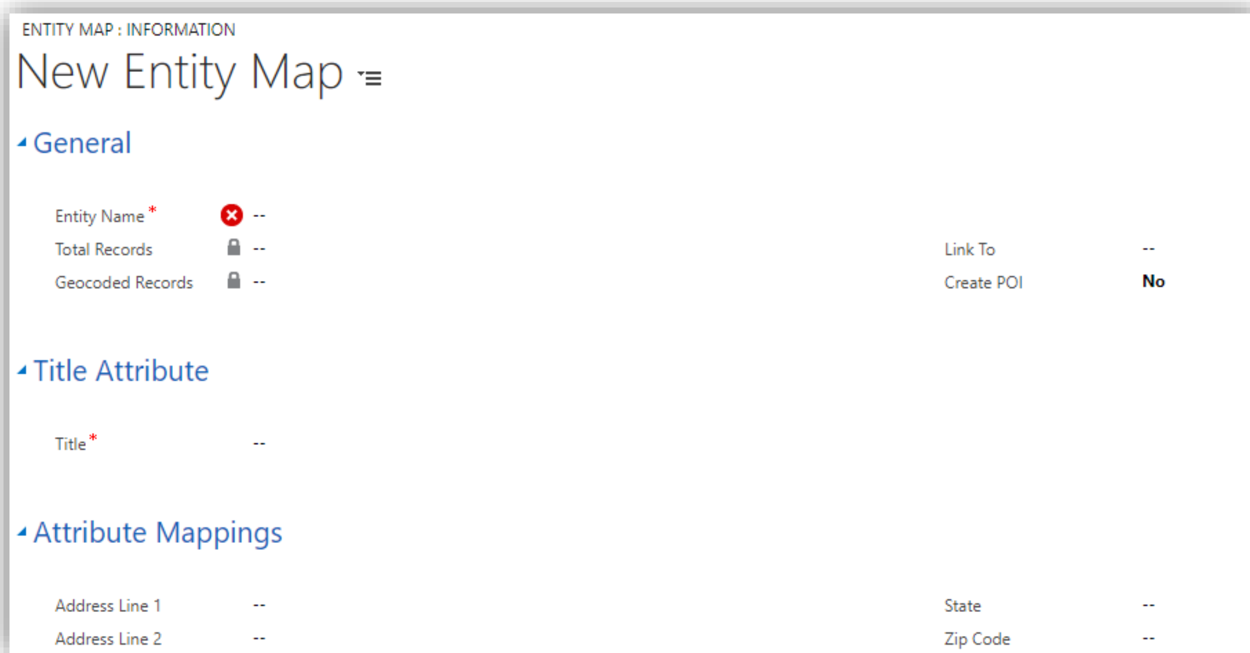
Setup Entity Map

Maplytics entity map is defined differently for different entities. We can classify the entities in CRM as activity type and non-activity type. Please see the below-mentioned description for the same:

- <u>**Non-Activity Type Entity**</u>: For these type of entities, there are two ways to build the entity map.
  - **An entity with own address attribute:** We take the address information from the field attributes defined in ***'Attribute Mapping'*** section. Examples of this type of entities are; Accounts, Leads, Contact, etc.
  - **An entity without own address attribute:** These are linked entities like opportunity, case, etc. that do not have their own address but are linked to account or contact. Please use ***'Link To'*** field while defining entity map for this kind of entities.
- <u>**Activity Type Entity**</u>: The user need not worry about ***'Attribute Mapping'*** section in this type. Maplytics takes the address information from all the Non-Activity type entity map defined in CRM. Examples of this type of entities are; Appointment, Task, etc.

Navigate to ***Settings > Entity Maps > New***

To plot Map for any entity, first you have to create the entity map for that entity as shown in the below screenshot;



Entity Name: <u>logicalname</u> of the entity

Link To: If the user wants to fetch the address from another entity then the user has to specify the link to attribute.

For example: To plot the opportunity records if the user wants to refer the address from the customer, i.e., from Account/Contact, then you have to specify Entity name as "opportunity" and link to attribute as "customerid".

Create POI: Select ***'YES'*** if you would like to add POI (Point of Interest) or nearby places data from Maplytics to Dynamics CRM.

Total Records: This shows how many total records are present in the entity.

Geocoded Records: This shows how many records are geocoded in the entity.

Title Attribute: Mention the field attribute which you would want to see while hovering on a pushpin on the map.

Attribute Mapping: In the attribute mapping tab, enter the attribute logical names of all the address fields to be used to plot the map. If the link to attribute is specified, then the address attribute should be of that linked entity. This is case sensitive field; the user needs to write the exact logical name. It supports String, Lookup, Two Options, Floating Point Number and picklist values.

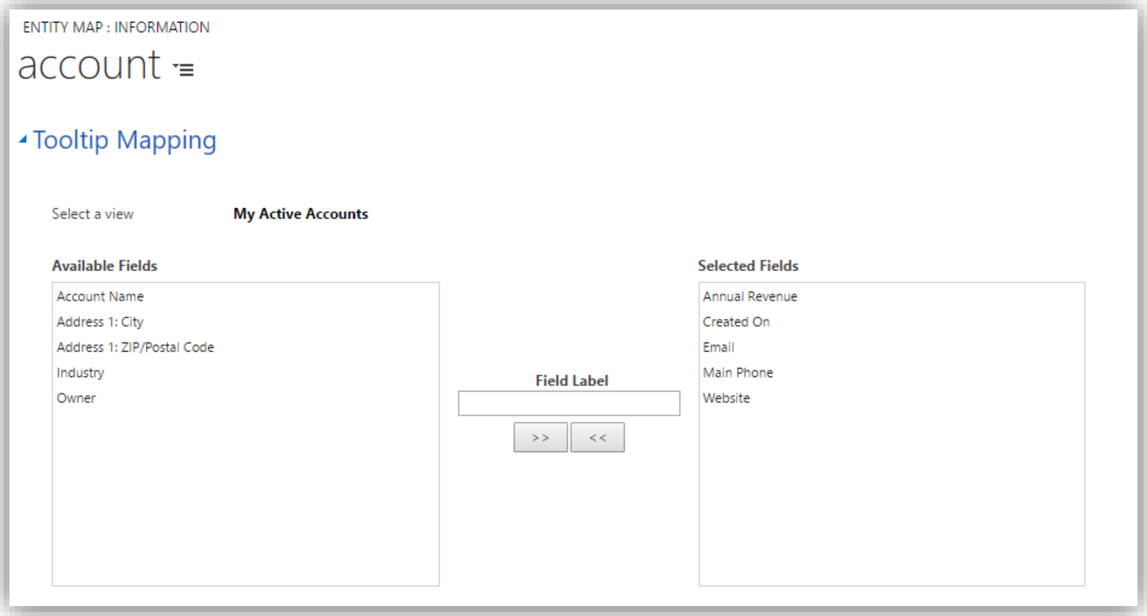
Tooltip mapping:

To configure the tooltip, Maplytics provides the Tooltip mapping UI. This is visible whenever the user clicks on a particular pushpin on the Detail Map. Maplytics populates all the public views of an entity that you specified in the Entity Name. The user can select a view from ***'Select View'*** drop-down. Selected view data fields will be populated in the ***'Available Fields'*** box, and the user can select those columns which one likes to see in the ***'Selected Fields'*** box.

Note: Before using ToolTip Mapping configuration, fill up all data till Attribute Mapping and click on Save button and refresh the page to see available options.

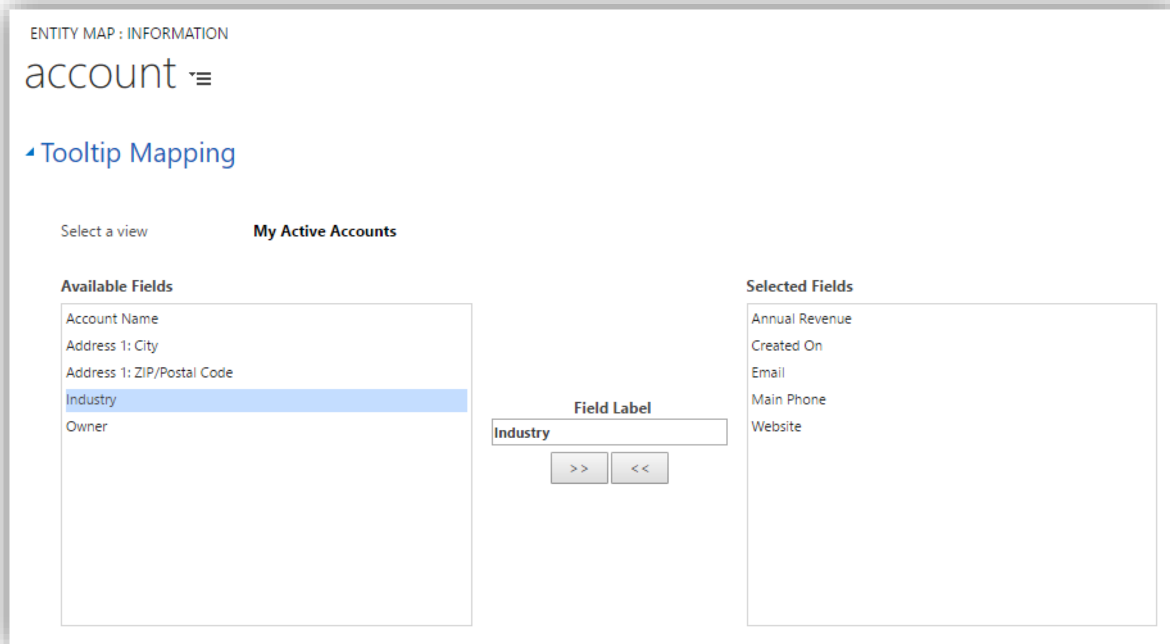
Follow the below steps to configure tooltip

1. Select the view for selecting the fields to be displayed for Tooltip. Example, select ***My Active Accounts*** view from ***'Select View'*** drop-down;



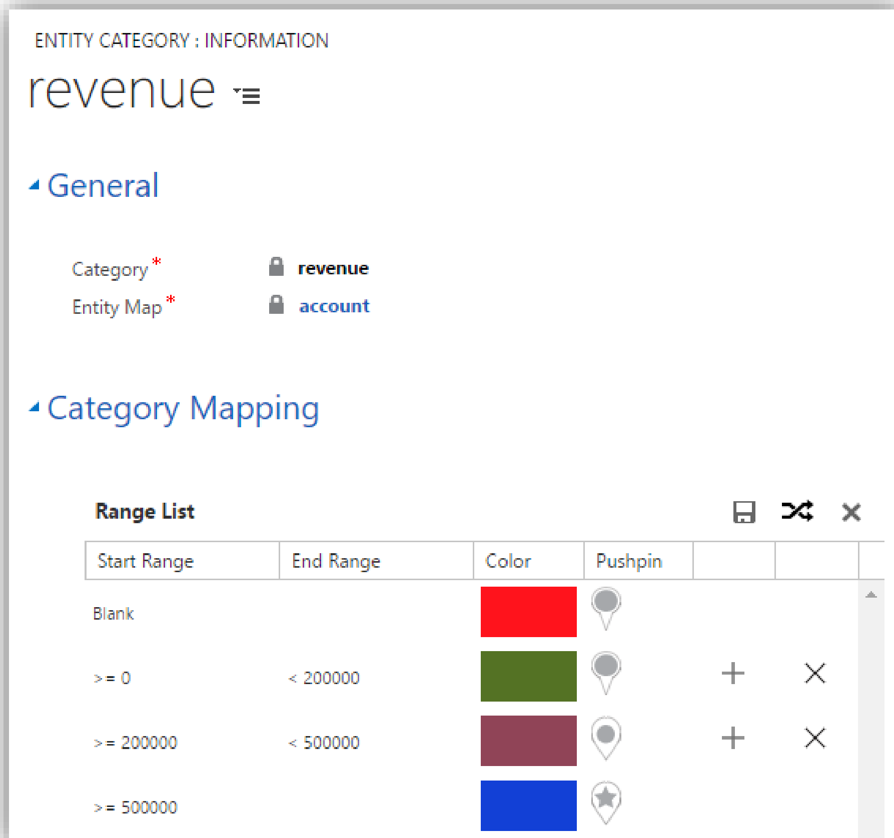
Note: To add more columns in "Available Fields" section of a particular view. Go to Setting > Customize the System > Select the required Entity and View > Add more columns and Publish all changes.

2. Select the attribute to be added. After selecting any attribute, its display name is automatically displayed in the Label. Users can change that label as per their choice. Then click on the ***forward arrow(>>)*** button to add an attribute to the Selected Fields as shown in below screenshot;



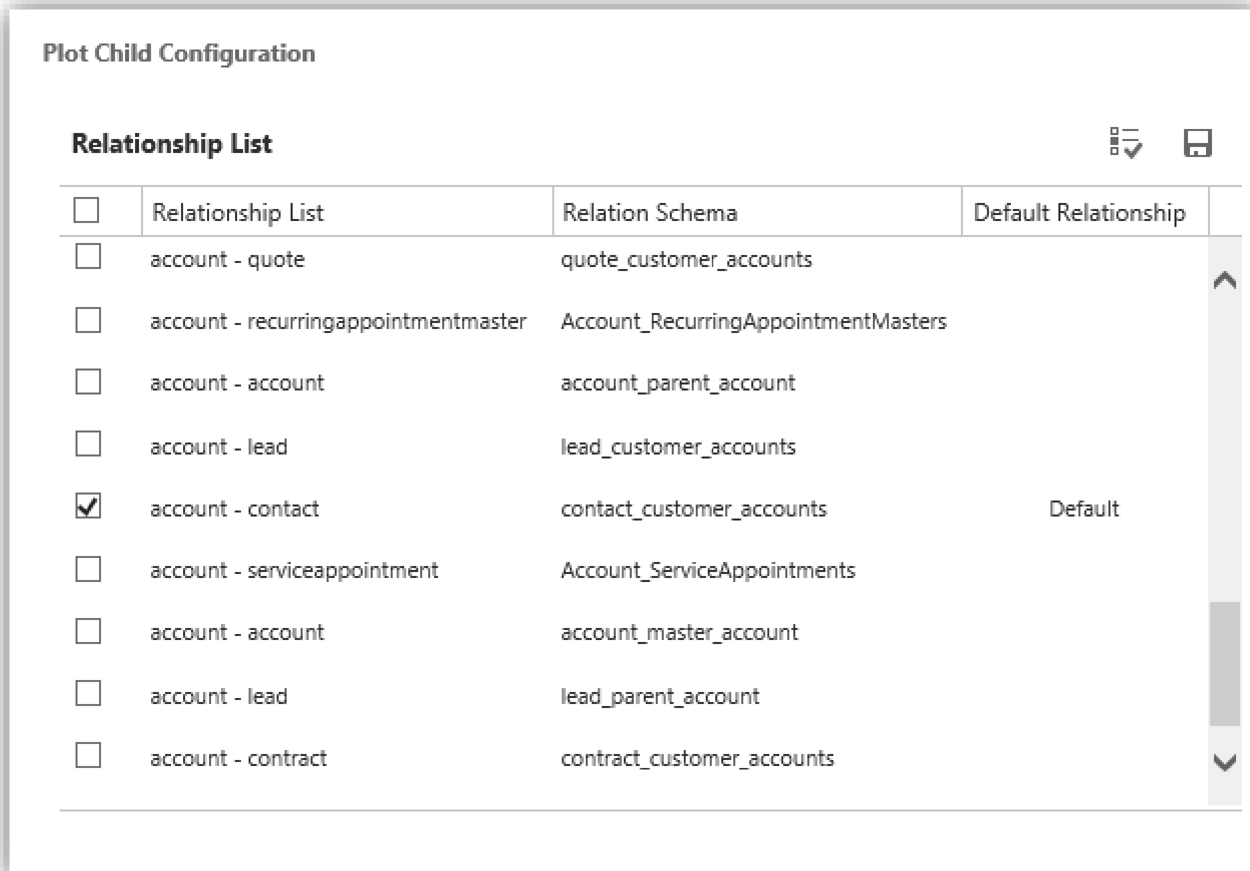
3. After configuring the attributes, click on the ***'Save'*** button.

Category Configuration: The user can define the color and the shape for the parameters belonging to a particular field. For example, the user can set different color & shape for annual revenue (Blank, 0-200000, 200000-500000 and >500000). This is reflected while using the Category option on Detail Map. The user can define a category for all the date type except Image, Date and URL data type.



Refer to the ***User Manual (Pre-Defined Color Categories section)*** for details on how to define the category. The user can also set the shape of category parameter as well.

Related Record Configuration: This table is used for the related/child record functionality. It contains all the One to Many (1:N) relationships belonging to this entity. The users can tick all the relations which they would like to see on the Detail Map and Map on individual CRM records.


Plot Child Configuration

Relationship List

	Relationship List	Relation Schema	Default Relationship
☐	account - quote	quote_customer_accounts	
☐	account - recurringappointmentmaster	Account_RecurringAppointmentMasters	
☐	account - account	account_parent_account	
☐	account - lead	lead_customer_accounts	
☑	account - contact	contact_customer_accounts	Default
☐	account - serviceappointment	Account_ServiceAppointments	
☐	account - account	account_master_account	
☐	account - lead	lead_parent_account	
☐	account - contract	contract_customer_accounts	

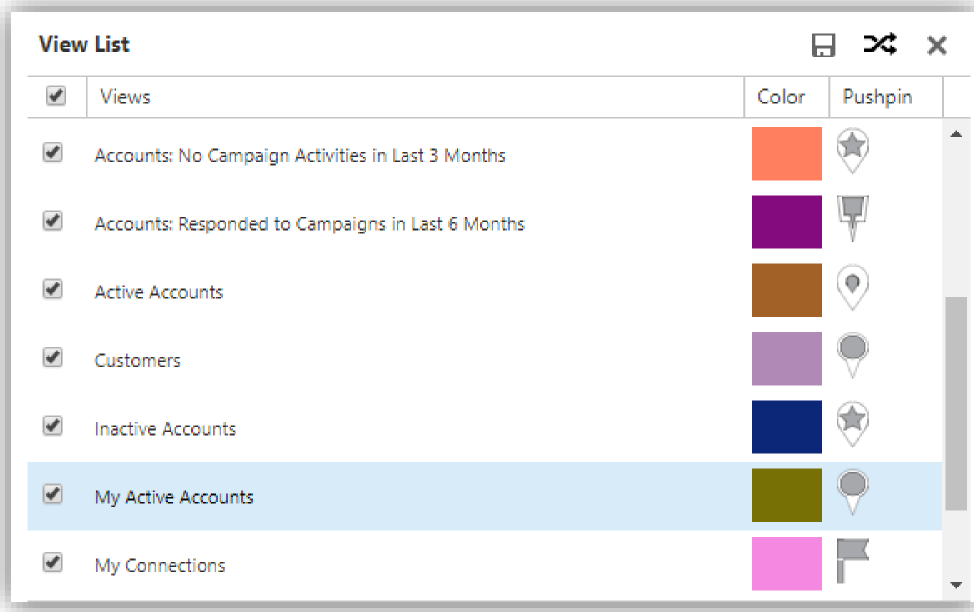
Once you make the changes, please click on the ***'Save'*** icon on top of the table.

Users can also define a Default relationship which will be plotted whenever the user opens the Individual map. Please use the following button to define the default relationship.

View Configuration: This table is used to configure the color and the pushpin shape for views visible on the map. The table contains a list of views depending upon the user security role. Please find a brief description of the same below;

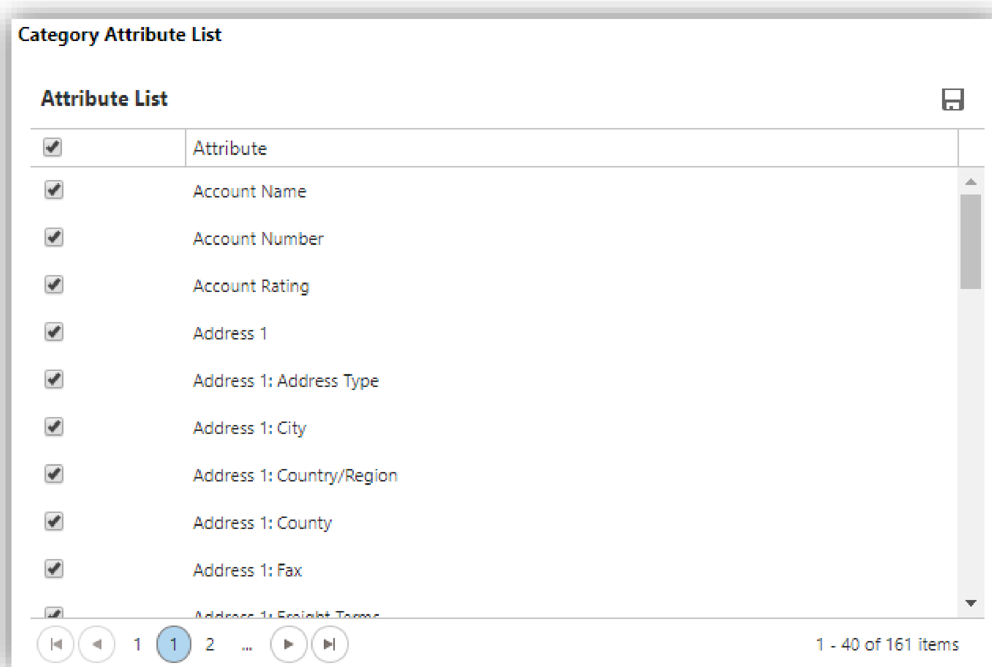
<u>Maplytics Admin:</u> The user with this role can set the color and shape for System Views, Marketing List, Maplytics Dashboards and their Personal Views. Admin can also select/de-select the System Views and Maplytics Dashboards at the organization level.

<u>Maplytics User:</u> The user with this security role can set the color and shape for their Personal Views and Marketing Lists only.



Once you make the changes, please click on the ***'Save'*** icon on top of the table.

Field Attribute List: This table provides the list of all the field attributes (OOB as well as custom) of the selected entity. Maplytics Admin can further choose the field attribute that should be available on the Detail/Heat Map as Category options:

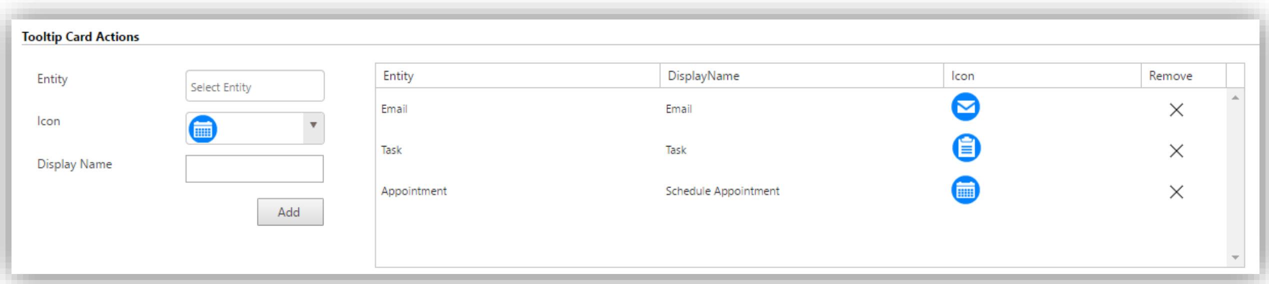


Once you make the changes, please click on the ***'Save'*** icon on the top of the table.

Advance Settings: In this section, the user can further customize Maplytics for their organization.

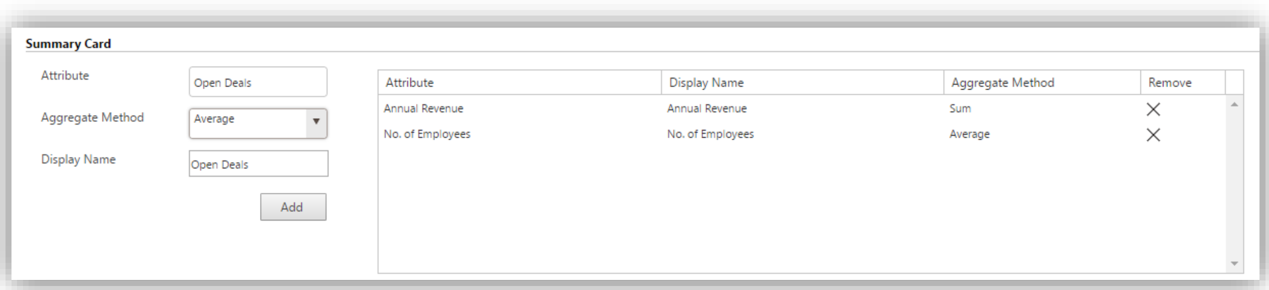
- **ToolTip Card Actions:** The user can define the Quick Action on the Tooltip card using this section. The user can use a maximum of 7 actions.

  Three actions are added as default (i.e., Change Owner, Open Record and Plot Related Record). We're not showing those actions here as these cannot be modified/deleted by the user. The user can define the next 4 action depending upon their choice.



  Entity: Select the entity name from the drop-down. The list contains all the custom as well as OOB Activity type entities
  Icon: Select the icon for this action
  Display Name: Mention the display name to be visible while hovering over the icon. By default, it will be the display name of the selected entity. There is a character limit of 25.

- **Summary Card:** The user can define the field attribute to summarize in this section. The user can add a maximum of 5 attributes for the summary.

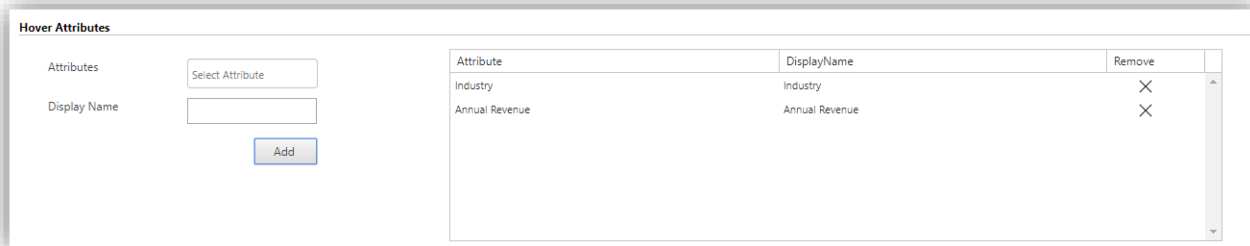


  Attribute: The list contains all the numeric field attribute (i.e., Floating, Decimal, Currency and Whole Number data type) for the required entity.

Aggregate Method: Two options are available to users – Sum or Average. If the user needs both options for a particular field, add two records for the same.

Display Name: Mention the name which you would like to see for this attribute. The summary method will be added by default after the Display name. For Example, Annual Revenue (Sum). There is a character limit of 25.

- **Hover Attribute:** User can define the attribute that should be visible for a quick glance when you hover over a particular pin on the map.



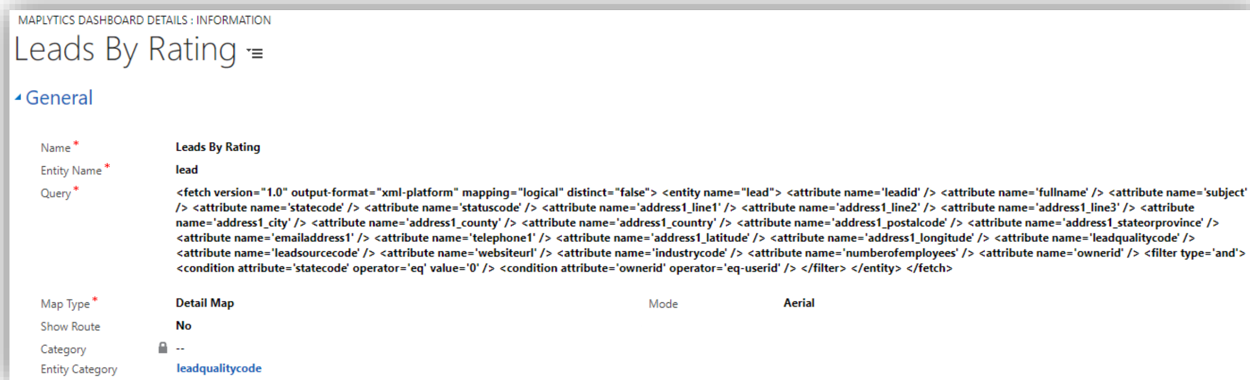
Attribute: The list contains all the field attributes except the Image Data Type for the required entity.

Display Name: Mention the name that you would like to see for this attribute. By default, it will the display name of the selected attribute. There is a character limit of 25.

Setup Dashboard Details

Users can define their own Dashboard views for Maplytics and include them as web resources in standard Dynamics CRM Dashboards.

Navigate to ***Settings ->Dashboard Details ->New.***



Name: Unique name for the Dashboard. The user will use this name to define the view to be included in the Dashboard.

Entity Name: logicalname of the entity. Name of entity for which the view is to be configured. For example, ***'lead'***.

Query: FetchXML query to be executed for the view to be plotted on the Map. The user can create a query using Advanced Find, and download generated FetchXML and set that here.

Note: *Make sure to include the latitude & longitude field attribute (address1_latitude & address1_longitude) in the query for the map to be able to read the geocoding information and plotting the map.*

In the queries, when the address data needs to be read from the customer (i.e., it could either hold an account or contact lookup) you need to provide the alias as 'maplyticsacc' when a link to a potential customer (account). For contact give alias as 'maplyticscont' when a link to a potential customer (contact) or If the address data needs to be read from another OOB or custom entities then you need to provide the alias as "map".

Map Type: Decide if the user would like a Detail Map representation or a Heat Map representation of the result set.

Category: The logical name of the attribute to be used for categorization of the result set. Each unique value of the category would be plotted in a different color. This attribute should be present in the query.

Entity Category: Lookup of the entity category record if the user wishes to use the pre-defined colors for the categories.

Mode: Choose the default mode in which the map should be presented. Choices available are ***Aerial, Road.***

Show Route: This option is available when you choose ***'Detail Map'*** option in the Map Type. This provides a shortcut button on the Dashboard to quickly create the route. The user can build a route for maximum 25 waypoints.

If the user selects Heat Map in Map Type then the following options will appear on the Dashboard record:

Heat Map Type: The user can define Heat Map type as described below;

No Boundary: It simply creates a Heat Map on the basis of the density of the measure selected without geographical boundaries.
Boundary: This will create Heat Map on the basis of the selected region type like City, Postal Code, Country, State, etc.

Summary Grouping: This field is used when the Map type is Heat Map. This helps the user to define the geographical summary criteria. The list contains following options; City, State, County, Country, Postal Code, Postal Code Areas, and Territory.

Measure: This field is also used for Heat Map. This helps the user to define the color scale of the Heat Map. For example, if the user wants to see the Heat Map on the basis of annual revenue, then please write the logical name of the same in this field. Higher the value, denser will be the map in that region.

Attribute Mapping:

In the attribute mapping tab, enter the attribute logical names of all the address fields to be used to plot the map. If the link to attribute is specified, then the address attribute should be of that linked entity. This is a case-sensitive field; the user needs to write the exact logical name without any mistake. It supports string, lookup and picklist values.

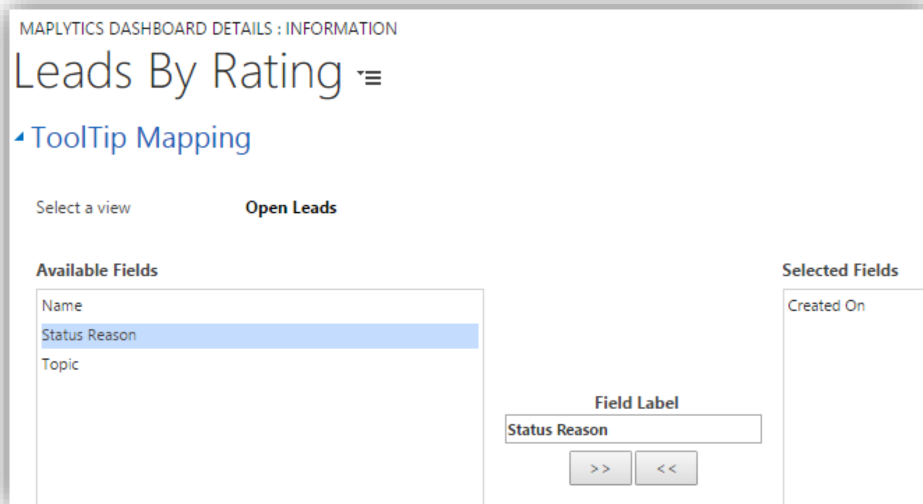
Tooltip Attribute:

To configure the tooltip, Maplytics have provided the Tooltip mapping UI. Maplytics will populate the public views of an entity that the user has specified in the Entity Name. The user can select a view from ***'Select a view'*** dropdown. As the user selects a view, Maplytics will populate the fields (columns) that have been defined for that view in the ***'Available Fields'***.

Note: Before the ToolTip Mapping configuration, fill up all data and click on save button.

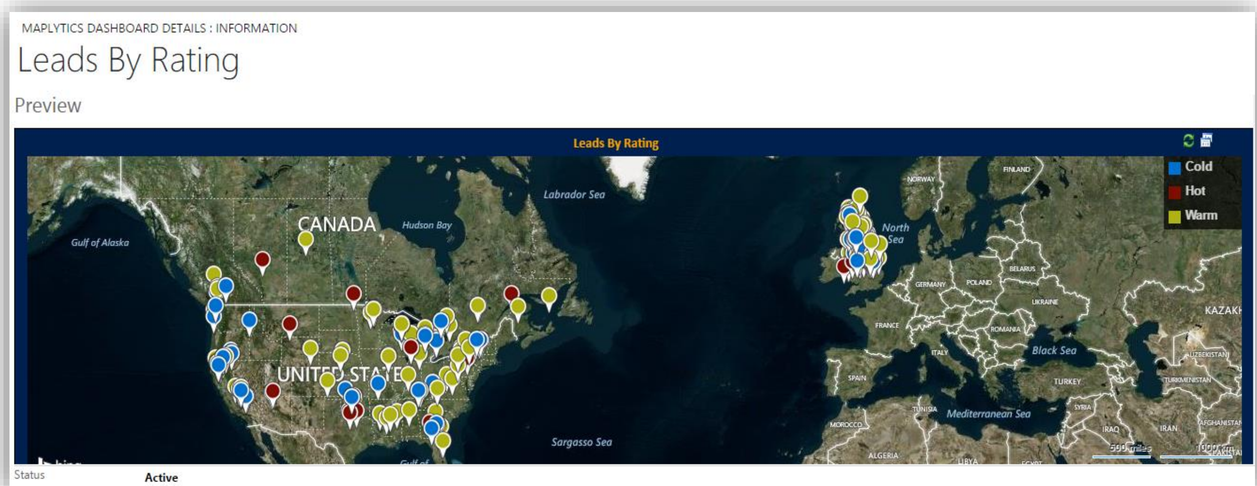
Follow the below-mentioned steps to complete this configuration;

1. Select the view for selecting the fields to be displayed for Tooltip. For Example, select Open Leads view from ***'Select View'*** drop-down;



Note: To add more columns in 'Available Fields' section of a particular view; go to Setting > Customize the System > Select the required Entity and View > Add more columns and Publish all the changes.

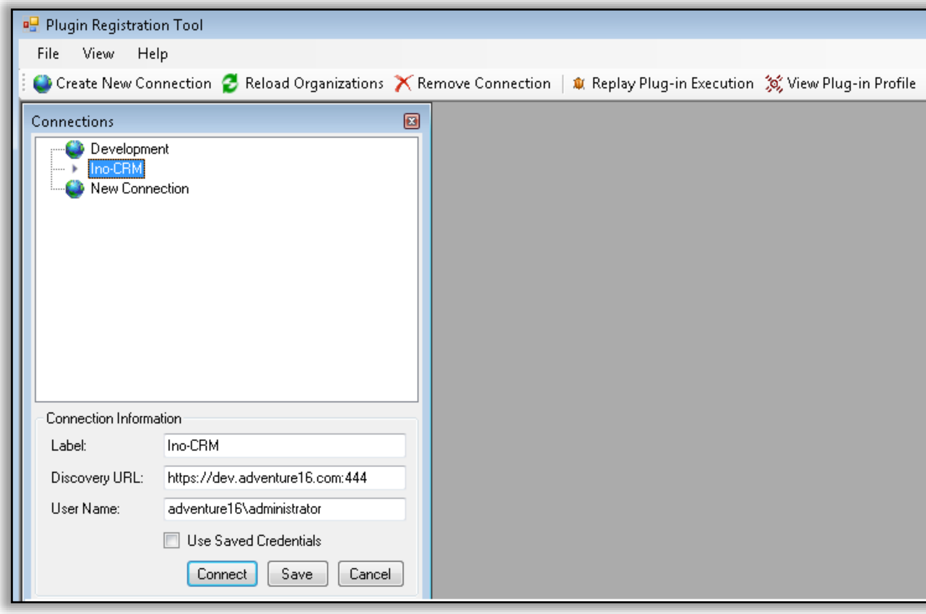
2. Select the attribute to add, after selecting any attribute the display name of the attribute is automatically shown on the Label, the user can change that label as per their choice. Then click on ***forward arrow(>>)*** button to add an attribute to the Selected Fields.
3. After configuring the attributes, click on the ***Save*** button.
4. Refresh the page. On the Preview tab, a pushpin will be displayed, and the Configure attribute for tooltip will be displayed after clicking on the pushpin. See below screenshot;



Steps to update the Plug-in Assembly Registration

You need to follow the below mentioned steps for changing the isolation mode of the plug-ins to none only when you are using Proxy server to access CRM. OTHERWISE, ignore the below steps.

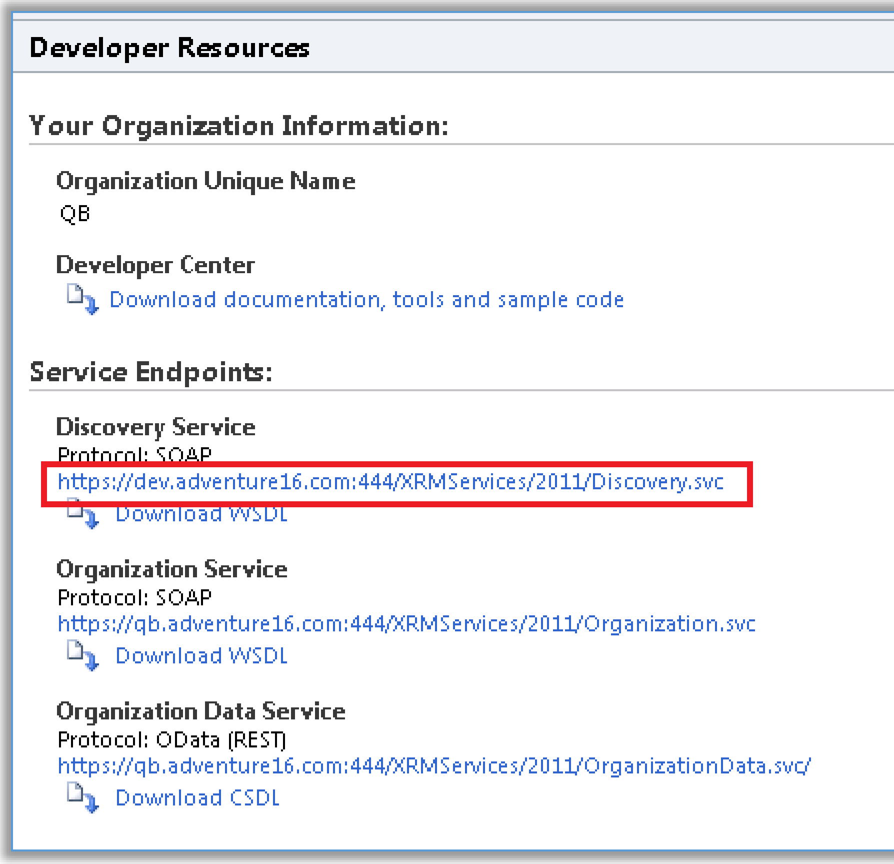
1. Click on the ***'PluginRegistration.exe'*** (from the files downloaded from the link); this will open the following window. Enter the connection information as shown in the below screenshot;



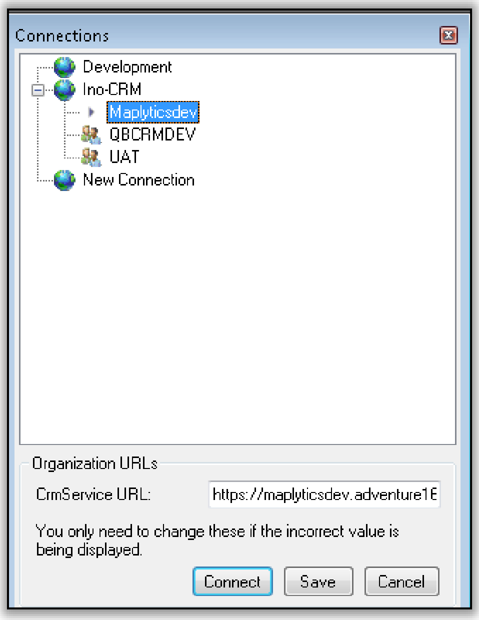
- <u>Label</u>: The name you prefer to give for this connection

- <u>User Name</u>: The user name of CRM, i.e., DomainName\username

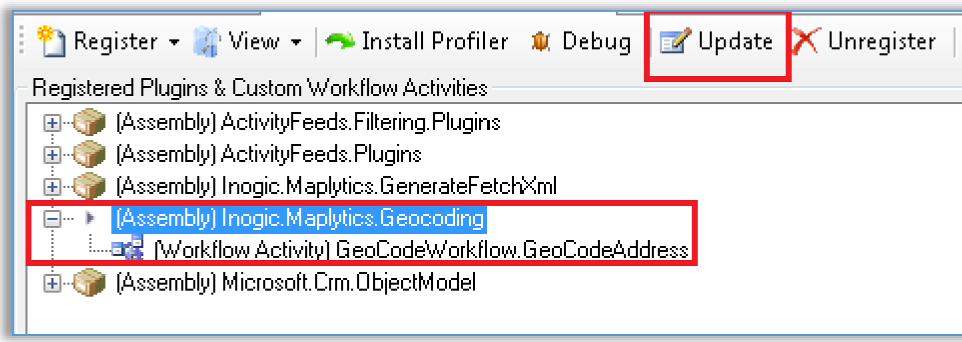
- <u>Discovery URL</u>: You have to enter the CRM Discovery URL. To read the Discovery URL, navigate to ***Settings → Customization*** and then click on ***'<u>Developer Resources</u>'*** which will open the following window and from this enter only the highlighted part in the Discovery URL text box.



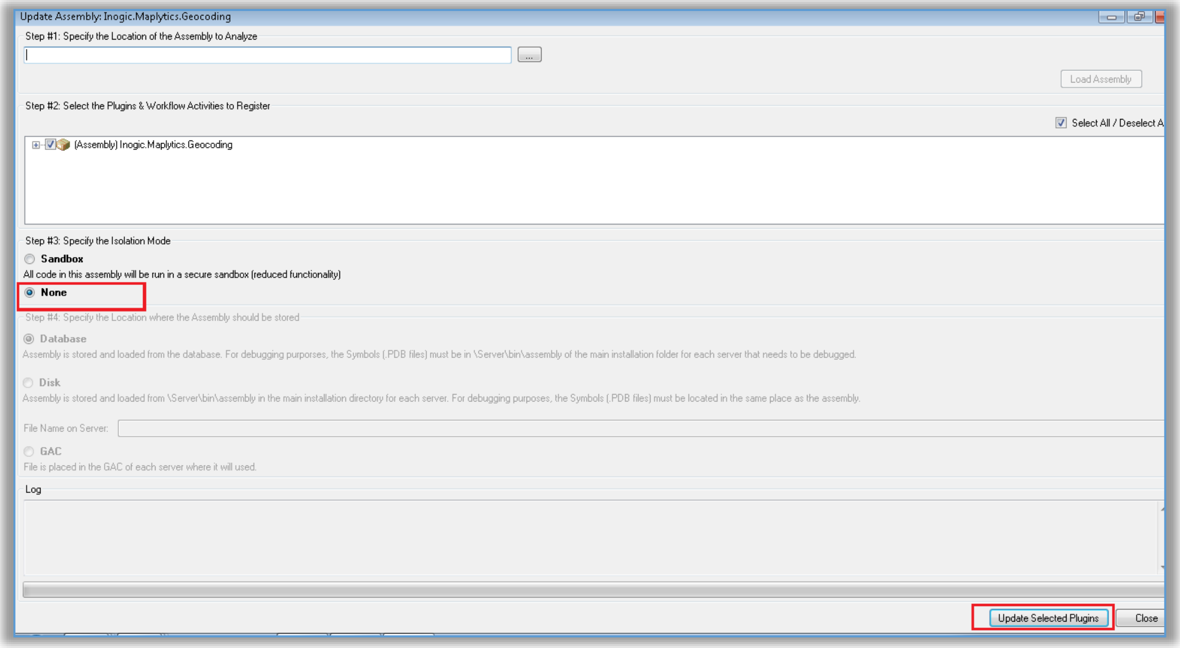
2. Click on the ***'Connect'*** button, enter the password on the window that will open. After clicking OK, you will see the below screen where all the organizations available on your CRM server will be listed. Select the org where Maplytics is setup and click on the ***'Connect'*** button.



3. Then locate the ***'(Assembly) Inogic.Maplytics.Geocoding'*** and click on the ***'Update'*** button.



4. On the following screen, you just need to change the Isolation mode from ***'Sandbox'*** to ***'None'*** as shown below and then click on the ***'Update Selected Plugin'*** button.



5. This would complete updating the desired changes for this plug-in to make them work outside of Sandbox.

Contact Us

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