

Maptaskr

Administration and User Guide

V1.0.2.0

Introduction

Maptaskr is a geo-productivity tool built for Microsoft Dynamics365 that provides geo based territory management, route planning and optimisation, lead generation and reporting of all your CRM data. See your CRM data on an easy to understand interactive map and map your customer data.

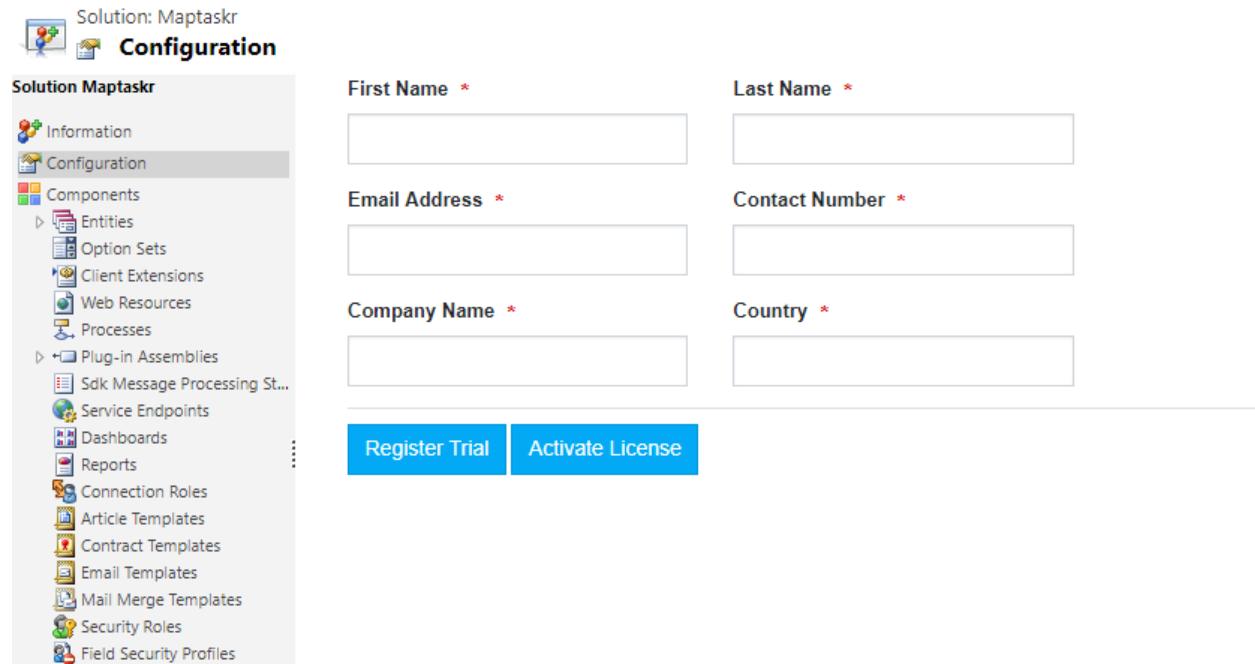
Features include:

- Increase your revenue by optimising your sales and customer data
- Map your data easily, plot and color code leads, accounts, opportunities or custom entity information based on categories
- Create custom areas (polygon) & radius searches. Search based on a location within a given radius or Geometrical shapes
- Appointment Planner: Planning and Saving Routes for Salesperson schedule
- Route Optimization: Direction and Optimized Routes for Sales visit along with nearby prominent places like Hotels, Airports, Parking, Parks, Coffee Shops
- Marketing Management: Search and Save location wise Marketing List to be utilized for promotions, marketing activities and event organizations
- Heat Map: Powerful Business insights based on Visualization of location data and heat maps
- Territory Management: Assign, Reassign and plan for Salesperson territory
- Import data layers: Upload and view external layers
- Mobility: Use CRM Mobile Apps and ability to use driving direction for the routes.

Administration Guide

1. License

Maptaskr can be used in trial mode for 14 days for 2 users. To activate trial, requests need to be sent from Solution configuration page as shown below.



Solution: Maptaskr
Configuration

Solution Maptaskr

- Information
- Configuration
- Components
 - Entities
 - Option Sets
 - Client Extensions
 - Web Resources
 - Processes
 - Plug-in Assemblies
 - Sdk Message Processing St...
 - Service Endpoints
 - Dashboards
 - Reports
 - Connection Roles
 - Article Templates
 - Contract Templates
 - Email Templates
 - Mail Merge Templates
 - Security Roles
 - Field Security Profiles

First Name *

Last Name *

Email Address *

Contact Number *

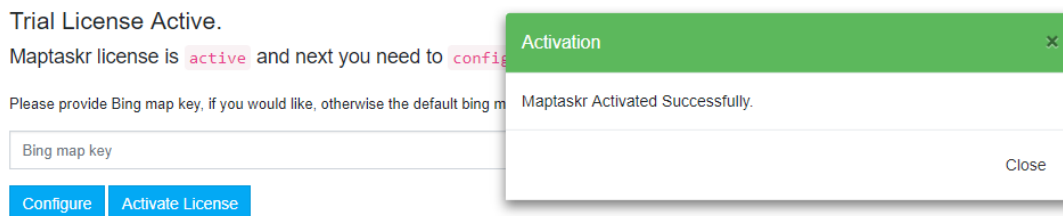
Company Name *

Country *

[Register Trial](#) [Activate License](#)

Figure 1: Solution Configuration

To try the trial, please fill in the details in configuration page and click 'Register Trial', this will create a trial license for the basic version.



Trial License Active.
Maptaskr license is active and next you need to configure...

Please provide Bing map key, if you would like, otherwise the default bing map key will be used.

Bing map key

[Configure](#) [Activate License](#)

Activation

Maptaskr Activated Successfully.

Close

Figure 2: Activation Confirmation

To upgrade to the standard version or full version, click 'Activate License' button.

2. Configuration

Once the trial or full version is activated, Maptaskr needs to be configured. The configuration button is visible in the solution configuration page. The license status appears at the bottom of the page as shown below.

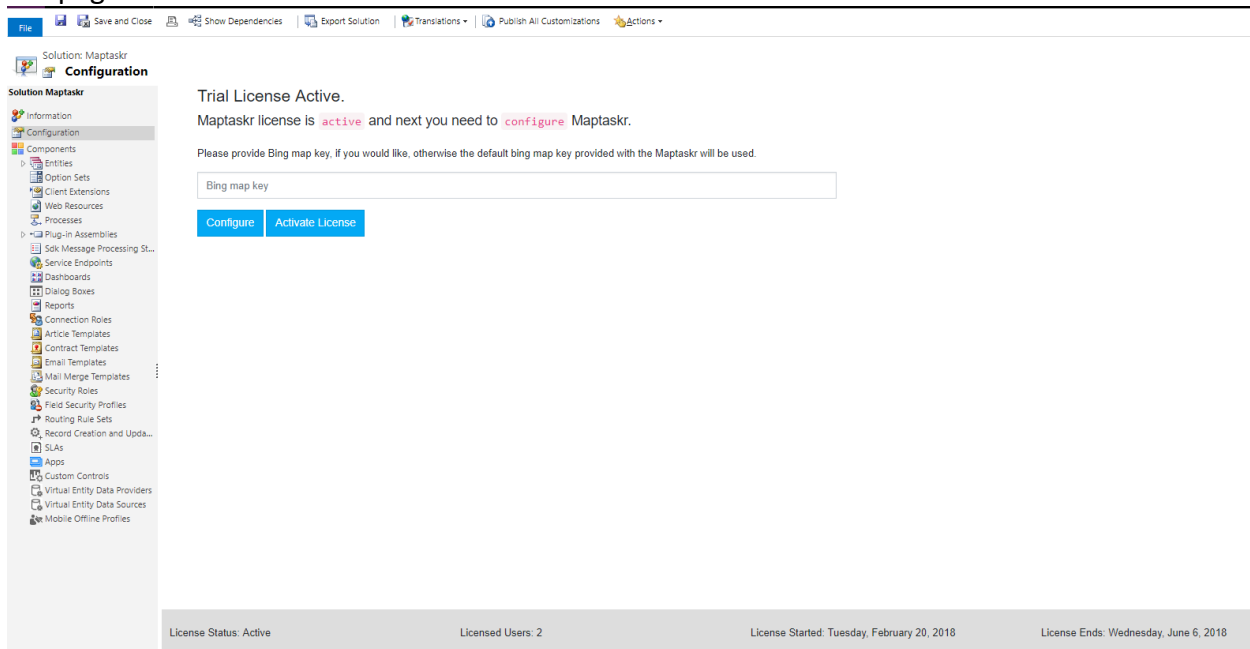


Figure 3: Configuration

Default Bing map key is provided with the license, include your Bing map key (optional) and click the 'Configure' button to complete the configuration.

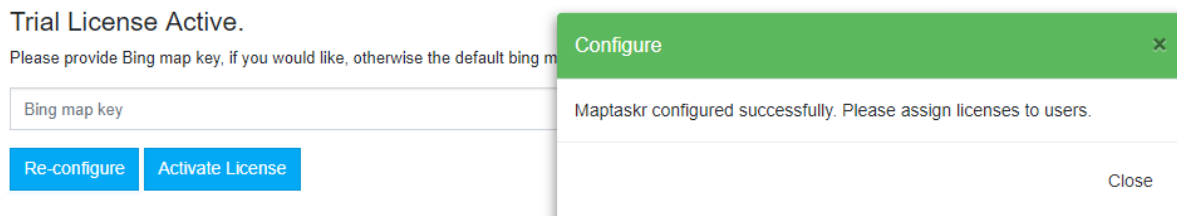


Figure 4: Configuration Confirmation

3. Licenses

Maptaskr solution creates the following two security roles:

- Maptaskr Admin – Users with this role will be able to manage Maptaskr settings.
- Maptaskr User – Users with this role will be able to use Maptaskr dashboard.

To assign license, click the "Assign License" link, select the license type from the dropdown, type user name or team name to assign and click the assign button.

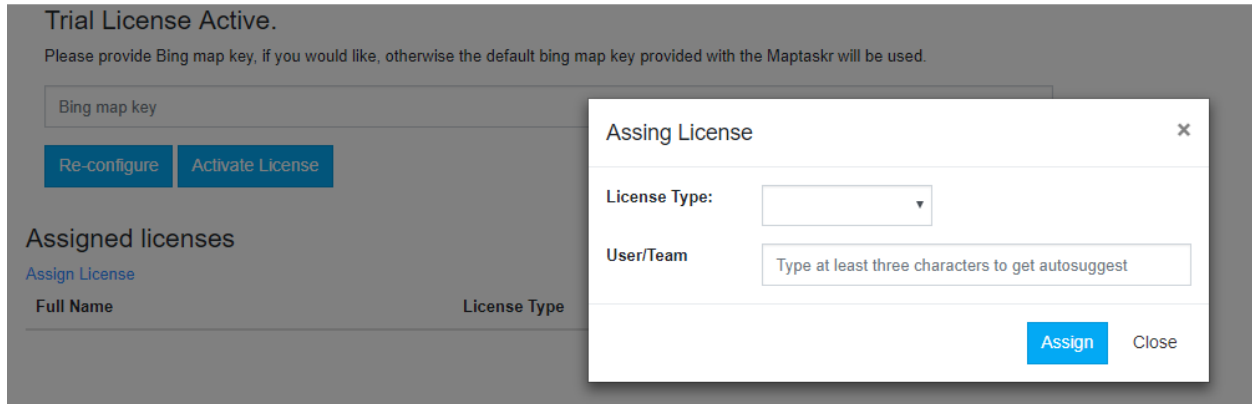


Figure 5: Assign License

To remove the license for a user, click the 'Remove' link.

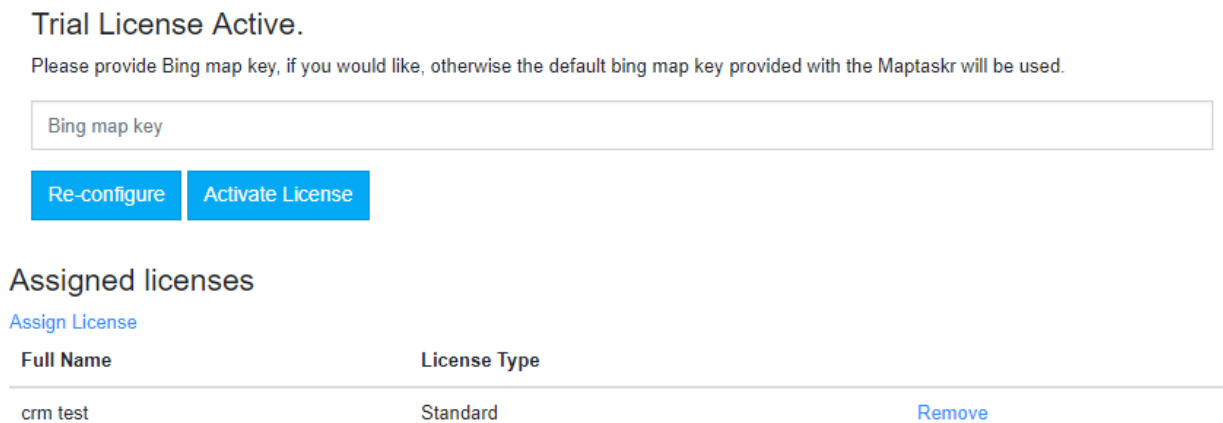


Figure 6: Assigned Licenses

4. Data Sources

By default, Maptaskr adds out of the box Dynamics entities which have address fields – Account, Contact, Lead. To include custom entities to be surfaced in Maptaskr, the entity details need to be added in Maptaskr Data Source which is available under:

Settings → Maptaskr → Data Sources.

The following image shows settings for out of the box 'account' entity.

MAPTASKR DATA SOURCE : INFORMATION

account ☰

General

Display Name *	Account
Entity Name *	account
Title Field Name *	name
Address Composite *	address1_composite
Street1 Field Name +	address1_line1
Street2 Field Name +	address1_line2
Street3 Field Name +	address1_line3
City Field Name +	address1_city
State Field Name +	address1_stateorprovince
Postcode Field Name	address1_postalcode
Country Field Name +	address1_country
Longitude Field Name *	address1_latitude
Latitude Field Name *	address1_longitude
Enabled *	Yes

Figure 7: Data Source entity fields

4.1 Mapping fields

The following table describes the fields used in the data source entity.

Field name	Description
Display Name	Name as you prefer to see in Maptaskr dashboard

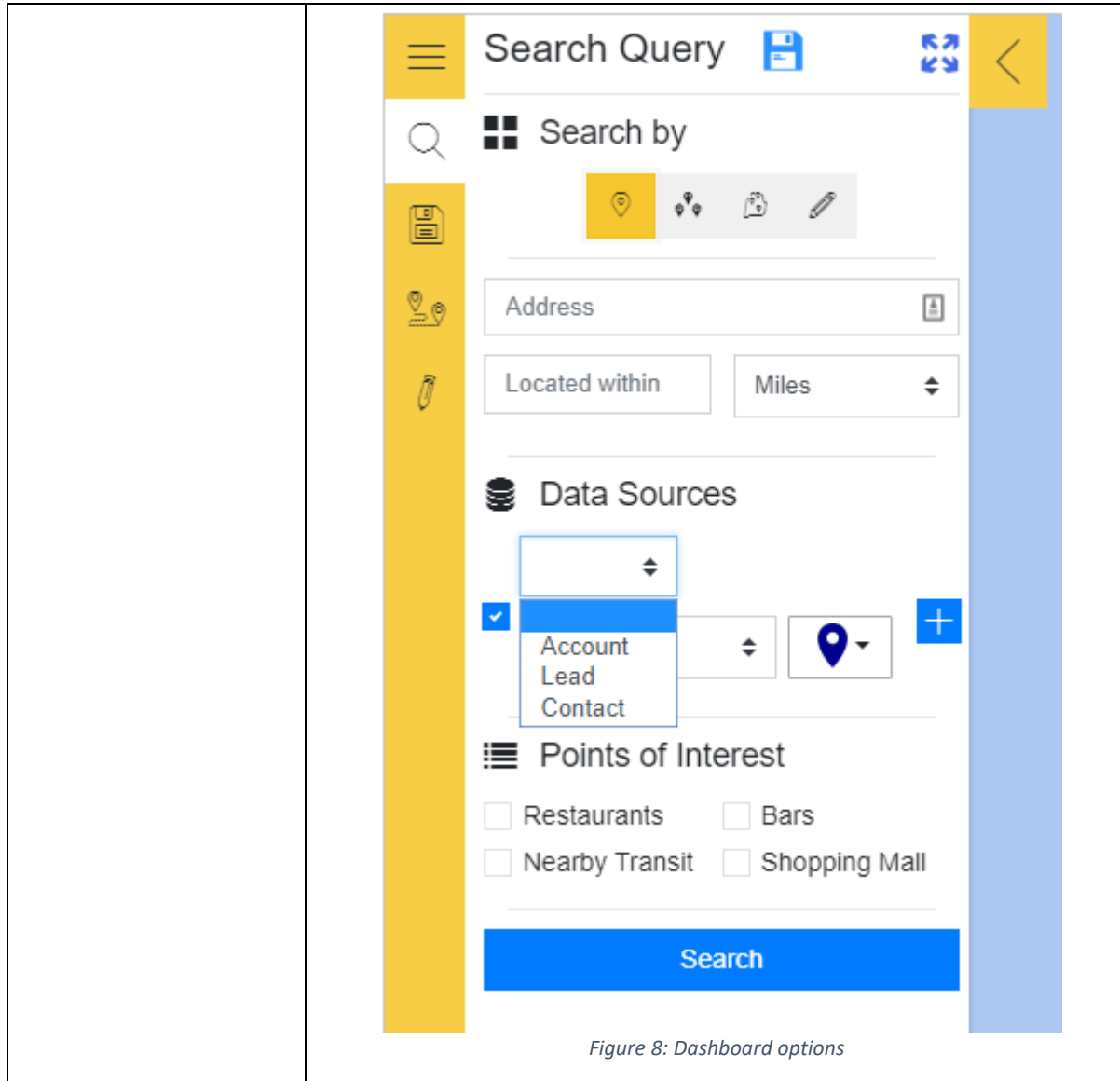
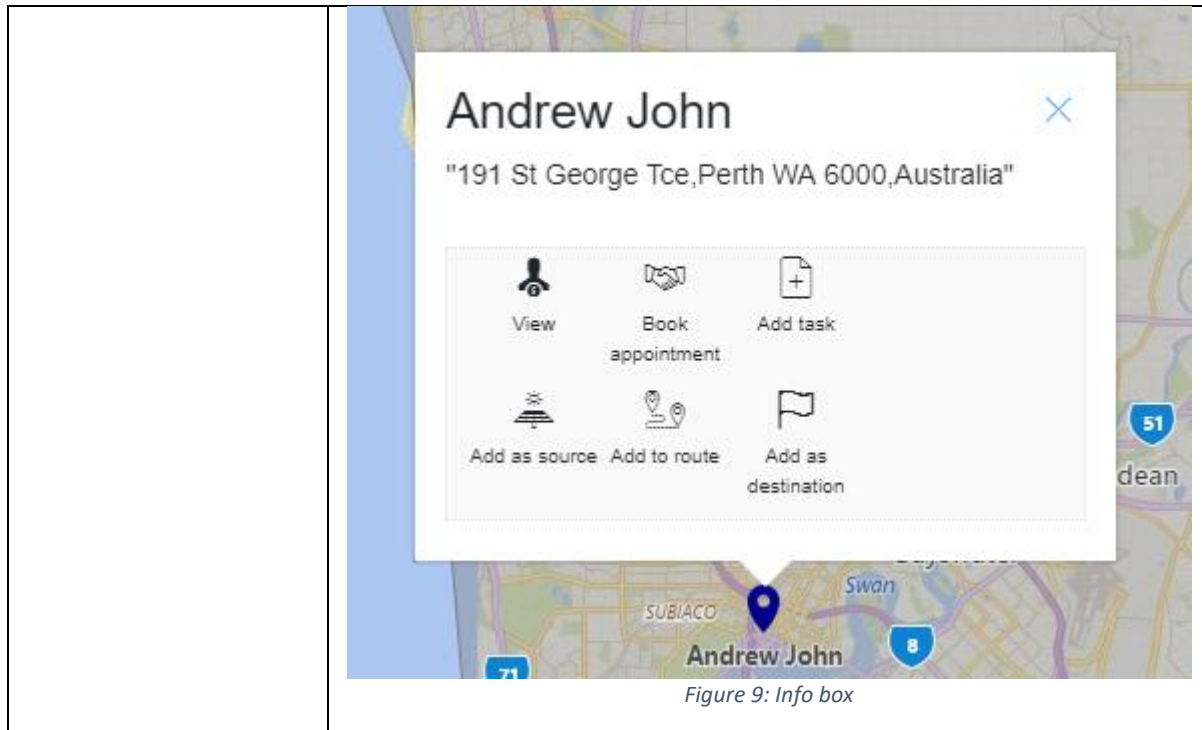


Figure 8: Dashboard options

Entity Name	Internal name for the entity
Title Field Name	Entity field name which will be displayed as title in Map's info box



Address Composite	Composite address field name
Street1 Field Name	First address field name
Street2 Field Name	Second address field name
Street3 Field Name	Last address field name
City Field Name	City field name of the entity
State Field Name	State field name of the entity
Postcode Field Name	Postcode field name of the entity
Country Field Name	Country field name of the entity
Longitude Field Name	Longitude field name of the entity. If Longitude and Latitude not been saved in these fields, Maptaskr will take longer to load. Please check workflow section to find details on how to populate these fields.
Latitude Field Name	Latitude field name of the entity. If Longitude and Latitude not been saved in these fields, Maptaskr will take longer to load. Please check workflow section to find details on how to populate these fields.
Enabled	If not enabled, the entity will not appear in Maptaskr dashboard

5. Workflow

Maptaskr solution provides a workflow to calculate longitude/latitude. The workflow runs when new entities are created or address related fields updated in an existing entity. When Maptaskr solution is installed, by default the workflow gets associated with Accounts, Contacts and leads. If you would like to use the workflow for custom entities, please create a new process and use the workflow action 'Ovass.Crm.Plugins.GeocodeActivity' for geocoding.

Please note, if entities have geocodes (longitude/latitude) calculated already, entities on the map will be loaded substantially faster. However, when you will install Maptaskr for the first time, existing entities may not have geocodes calculated. To force pre-populating geocode, run the 'Maptaskr Geocoder' workflow against entities (account, for example).

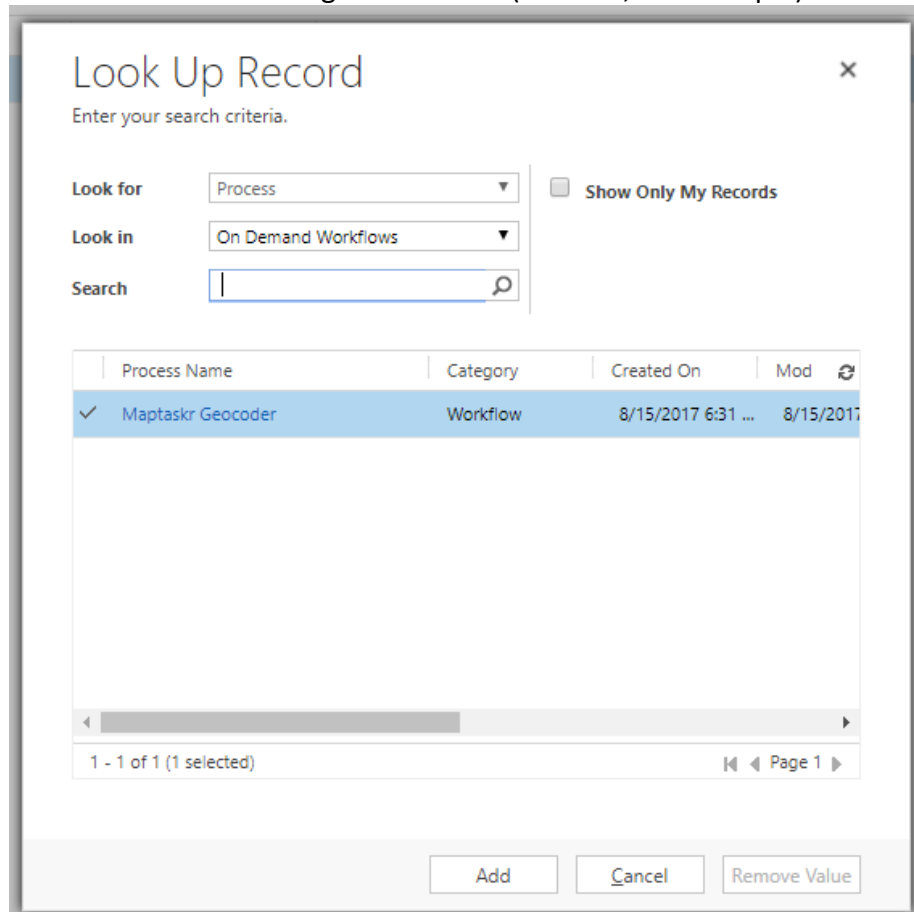


Figure 10: Geocoder

Note: If you have any other workflow/process that does geocoding already, please disable Maptaskr Geocoder workflow.

6. Territory

Note: Available in Standard edition and above.

Territories need to be setup for them to be available within Maptaskr. To setup territories, navigate to Settings → Business Management → Sales Territories

Click on the "New" button and fill in the details.

Navigate to Geographies → Add New Geography

GEOGRAPHY : INFORMATION

New Geography ☰

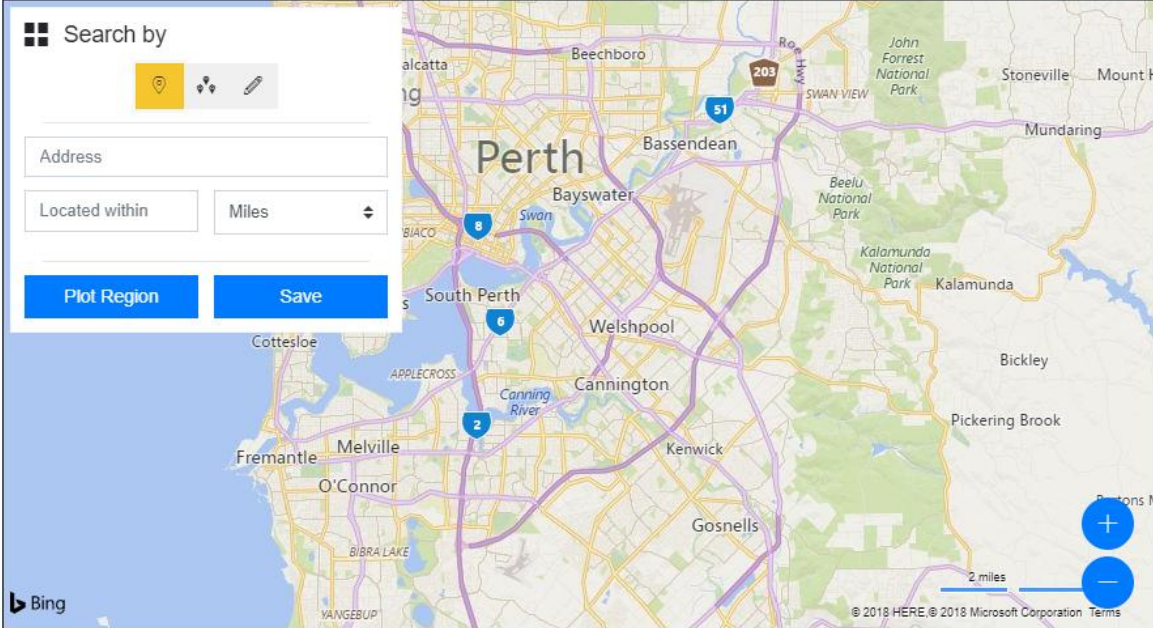
General

*Name

*Owner  Ravi Nichani

Search by

Plot Region
Save



The map shows the Perth region in Western Australia, including areas like South Perth, Bayswater, Welshpool, and Canning. A search overlay is present on the left side of the map. The map includes a scale bar for 2 miles and a zoom control in the bottom right corner.

Figure 11: Territory setup

Set up the territory by either searching or drawing and click the save button.

User Guide

1. Dashboard

Users who have been assigned to Maptaskr team will see 'Maptaskr Dashboard'. As mentioned in 'Configuration/Security' section, you need to ensure 'Maptaskr User' role is assigned to Maptaskr team. User without 'Maptaskr User' role will not see the Maptaskr Dashboard.

By default, Dashboard loads inside Dynamics page. However, you can load the Maptaskr dashboard in full view by clicking full view option as shown below:

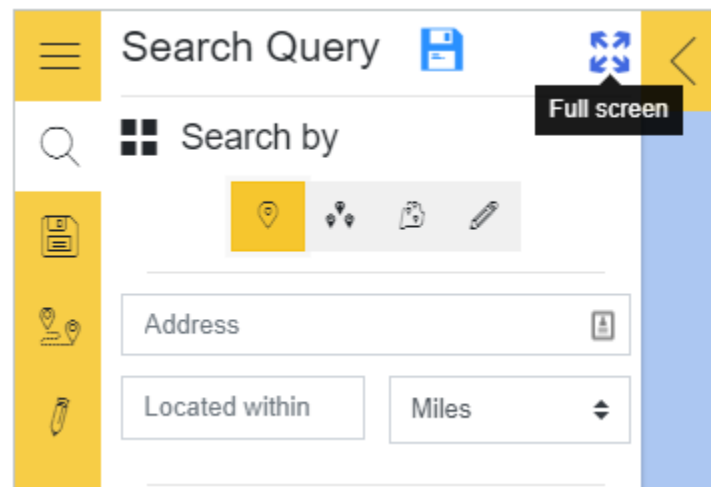


Figure 12: Full Screen

Maptaskr creates three data sources – Account, Contact and Lead by default. To find out how to add more data sources please see [Data Sources](#) section.

2. Search

Maptaskr allows user to search by Address with proximity, Search by region (City, State, Postcode, Country) and Search by drawing. You can select one or more entities from data source dropdown and change pushpin colors on the map.

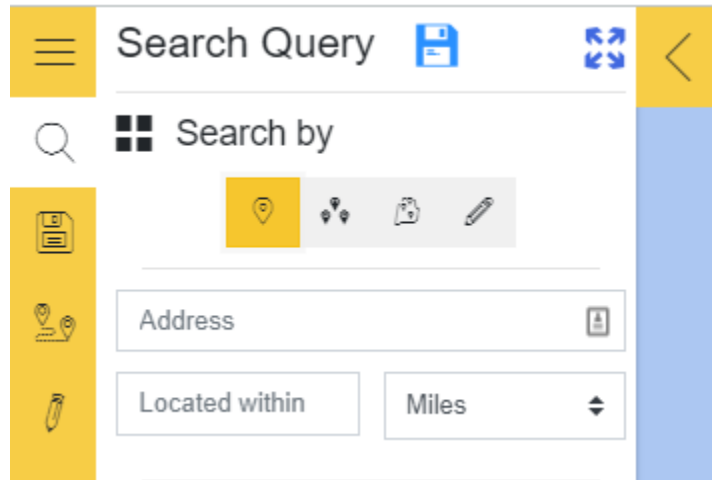


Figure 13: Search by address

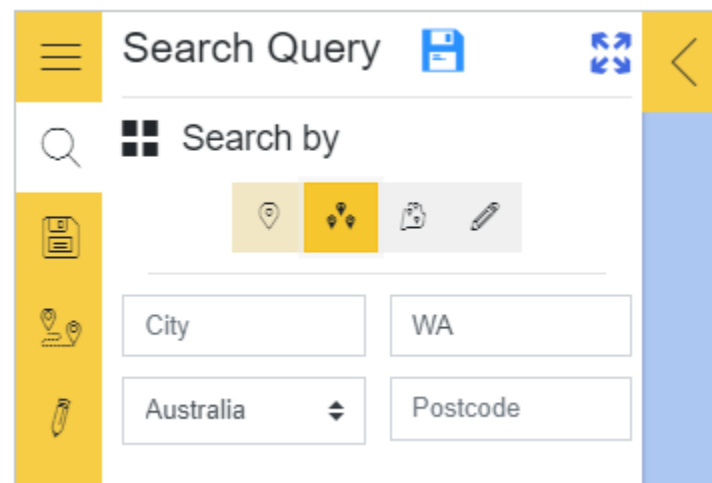


Figure 14: Search by region

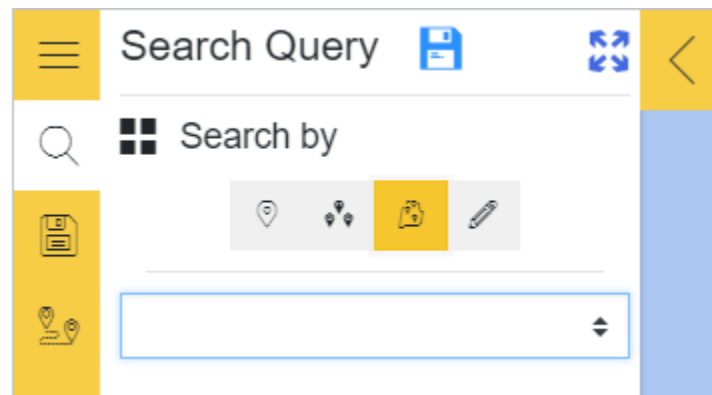


Figure 15: Search by territory

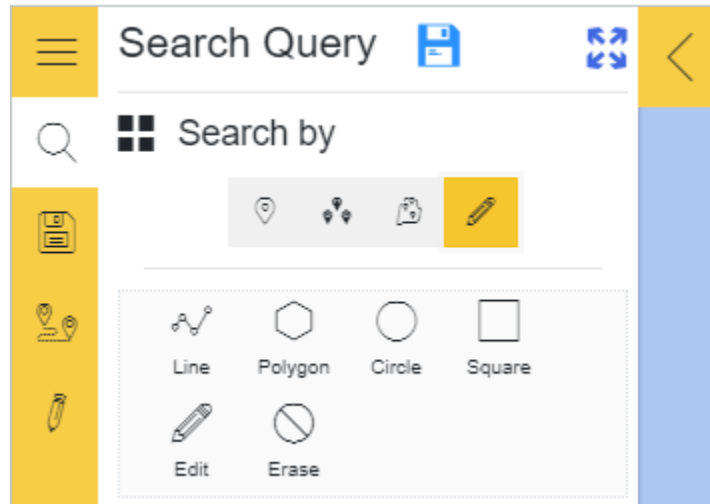


Figure 16: Draw and Search

3. Queries

Commonly used search criteria can be saved for later usage as well to share with others. User can define search criteria and then save that as 'Query' and later load that query.

4. Direction

Pushpins on map can be used to set directions. A pushpin on map can be set as source, destination or can be added to route as shown below:

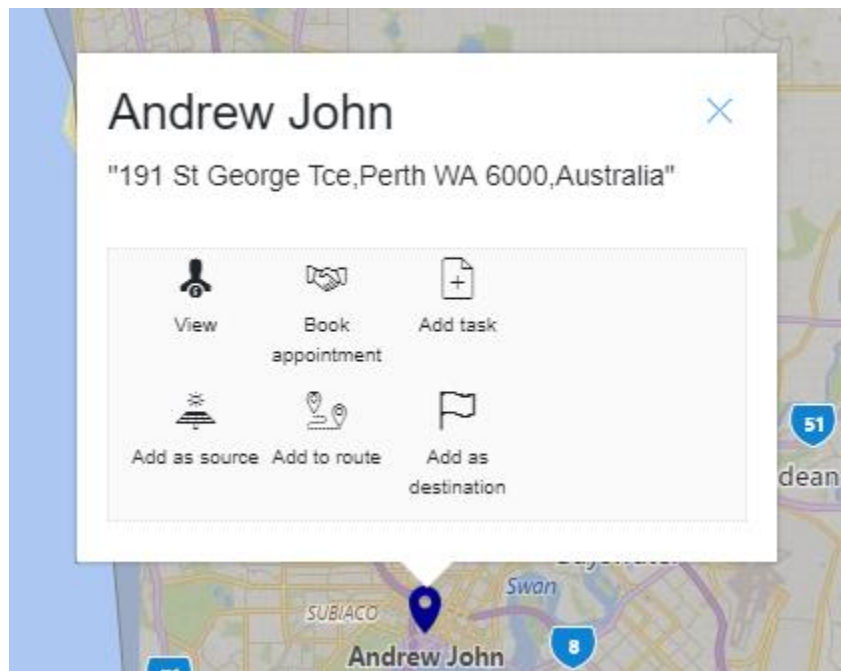


Figure 17: Pushpin options

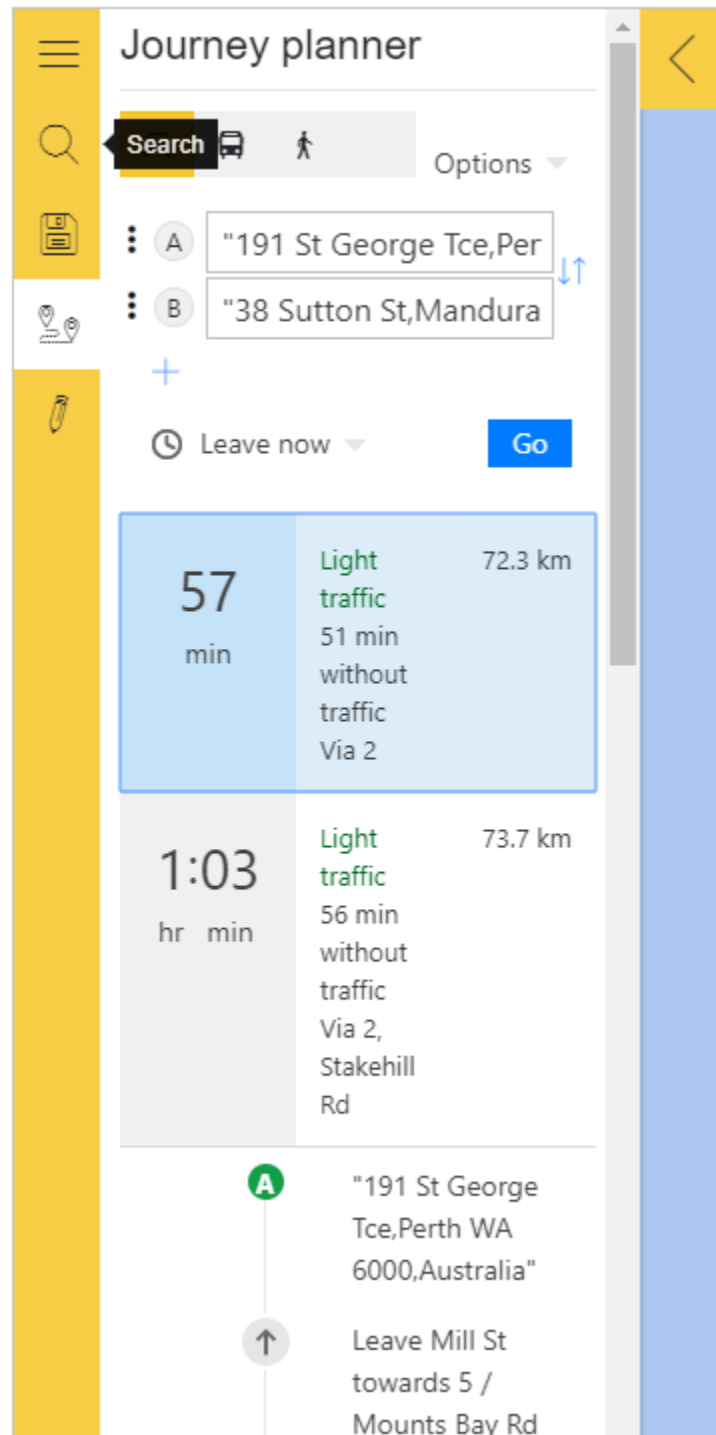


Figure 18: Route details

5. Annotations

Annotations can be added to the map. Click on the 'Annotation' link in the left navigation to view the options available.

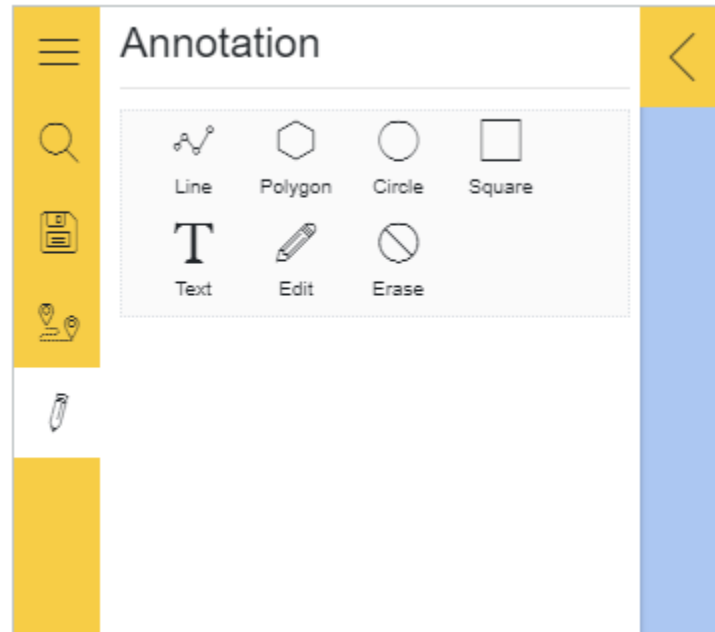


Figure 19: Annotation

Select the any of the annotation option and place them on the map.

6. Layers

Note: Available in Standard edition and above.

Layers can be uploaded and viewed on the map. Click on the 'Library' link in the left navigation. Click the + button to upload a layer.

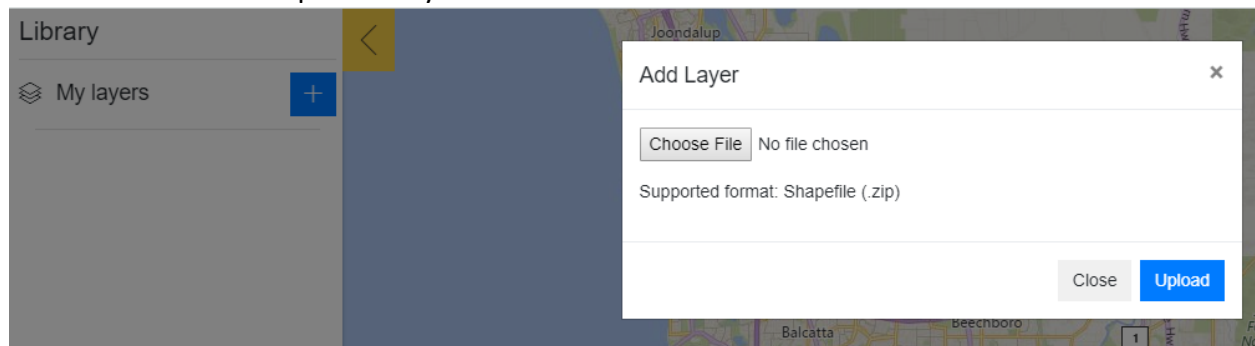


Figure 20: Layers