Maplytics™ – Maps Integration with Dynamics 365 (CRM)

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Maplytics™ – Locational Intelligence Simplified

Allowing users gain geo-spatial insight to ease the business process execution. It uses the power of Bing Maps.

Available for CRM 2016 and above, Dynamics 365 Customer Engagement, Online, On-premises, Partner Hosted, IFD, Dataverse (PowerApps)

KEY FEATURES

- Geocode Data
- Visualize Data on a Map
- Search by Region & Shape
- Sales Territory Management
- Proximity Search (Distance & Time)
- Concentric Proximity Search
- Save Map Templates
- Check-In/Check-Out
- Set Default Template
- Plot Related Records
- Shape/Excel Layer Integration
- Targeted Marketing Lists
- Appointment Planner
- Route Optimization & Sharing
- Truck Routing
- Along the Route Search
- Point of Interest (POI) Search
- Create new records from Map
- Analytical Map Dashboards
- Heat Map Visualization
- Auto-Territory creation
- Summary Card
- Personalized Pushpin icons
- Visualize categorized data
- Custom Tooltip Actions
- Real Time Tracking
- Multi-User Auto Scheduling
- Pie & Column Chart in Heat Maps
- Security Access Template
- Overlay Layer Visualization
- Area of Service
- Show/Hide Layers
- Turn-by-turn Navigation
- PCF controls
- Sort and Filter Data
- Maplytics API
- Land Area Mapping
- Census Data visualization
- User Level Personalization
- Live Traffic
- Multi Search Layers
- Default Origin & Destination
- Batch Processing
- Shape Operations

Supported Languages: English, German, French, Spanish, Portuguese, Turkish and Arabic

Bing maps

Available on Microsoft AppSource

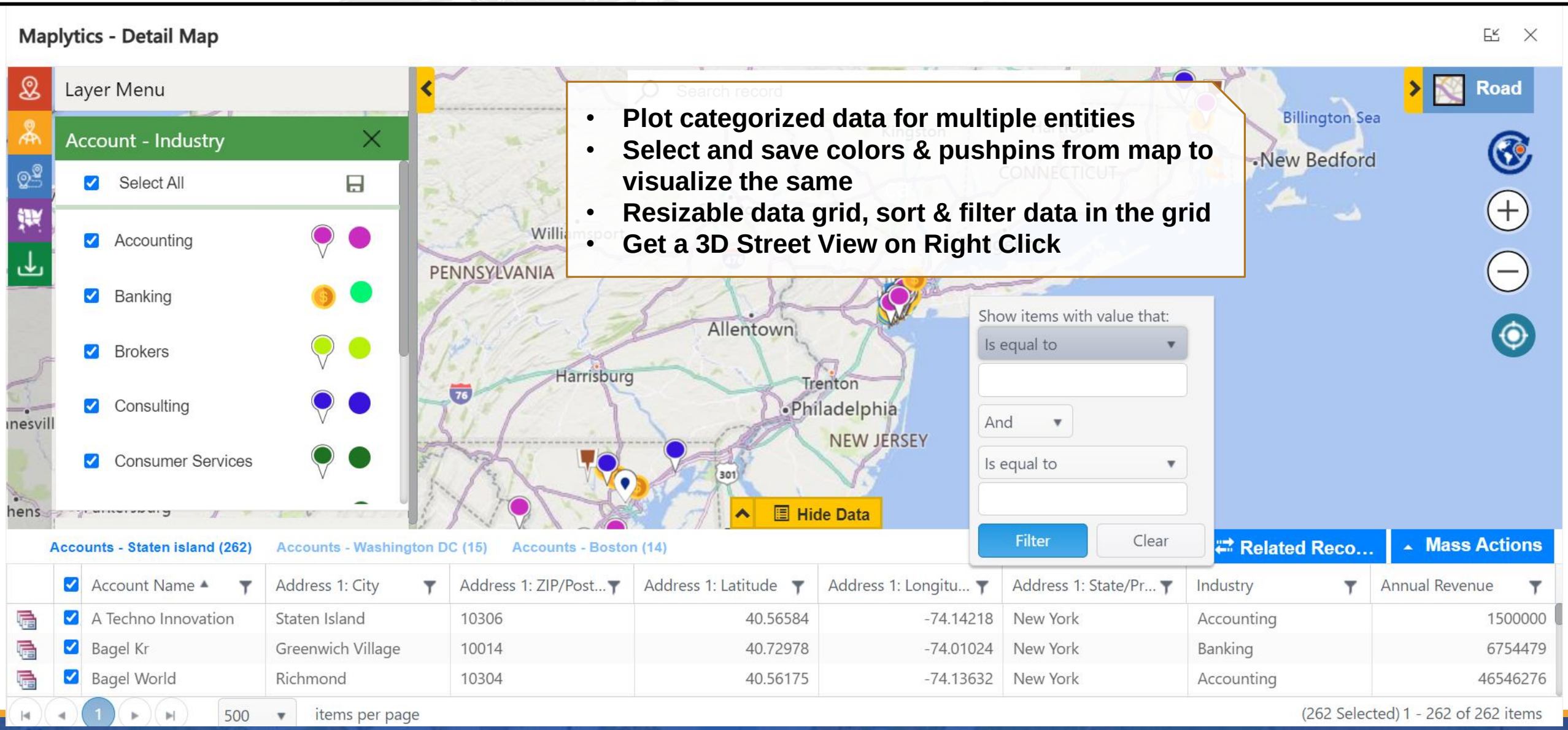
MULTI-LANGUAGE COMPATIBILITY

- **Auto detects language set in your Dynamics 365/CRM**
- **Currently available for English, Spanish, German, French, Portuguese, Turkish, Arabic, Hungarian, Dutch, Polish & Russian**

GEOCODE DATA

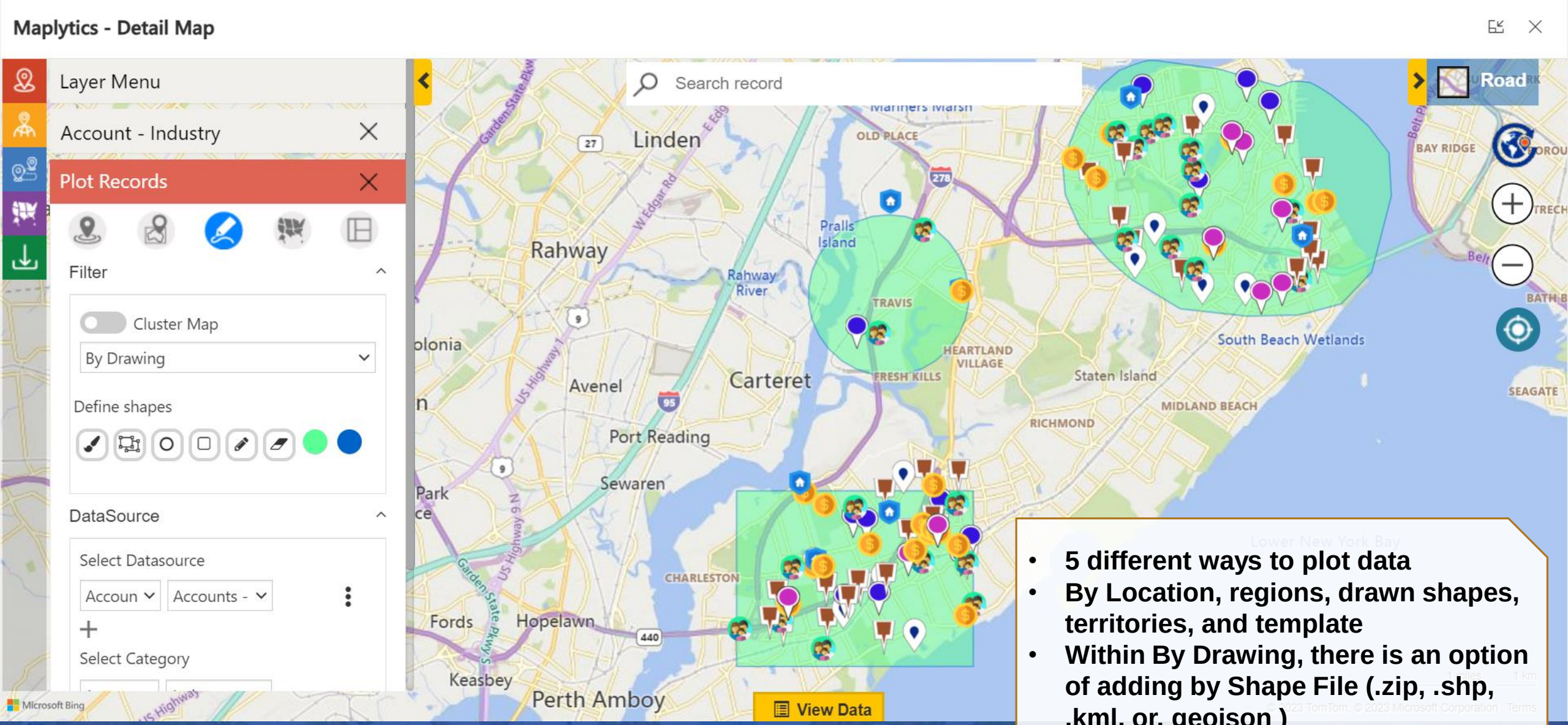
- **Find Latitude & Longitude of your address data**
- **Locate Client geographically**
- **Geocode Millions of CRM Records**
- **Easy & interactive platform for geocoding records**

MAP YOUR DATA



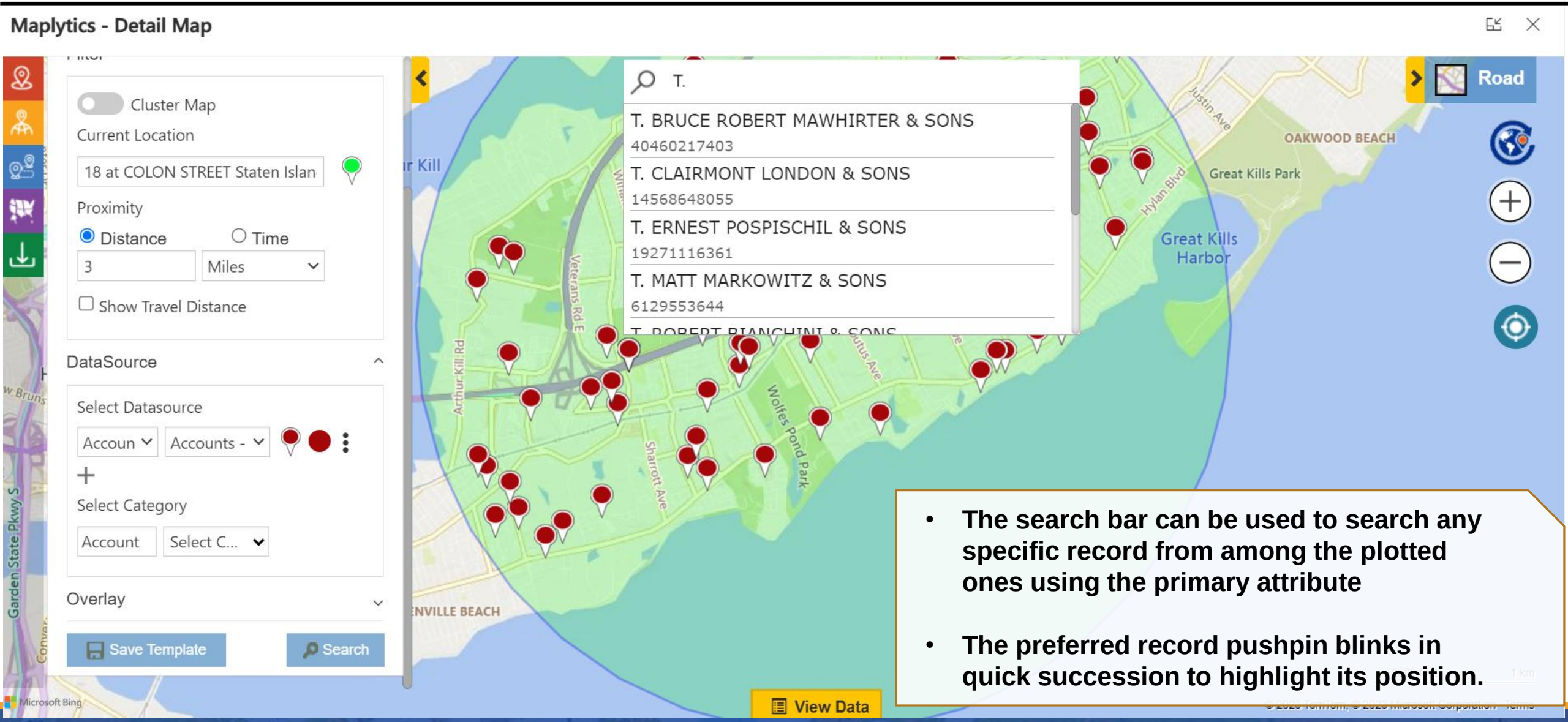
- **Plot categorized data for multiple entities**
- **Select and save colors & pushpins from map to visualize the same**
- **Resizable data grid, sort & filter data in the grid**
- **Get a 3D Street View on Right Click**

MULTIPLE OPTIONS TO PLOT DATA



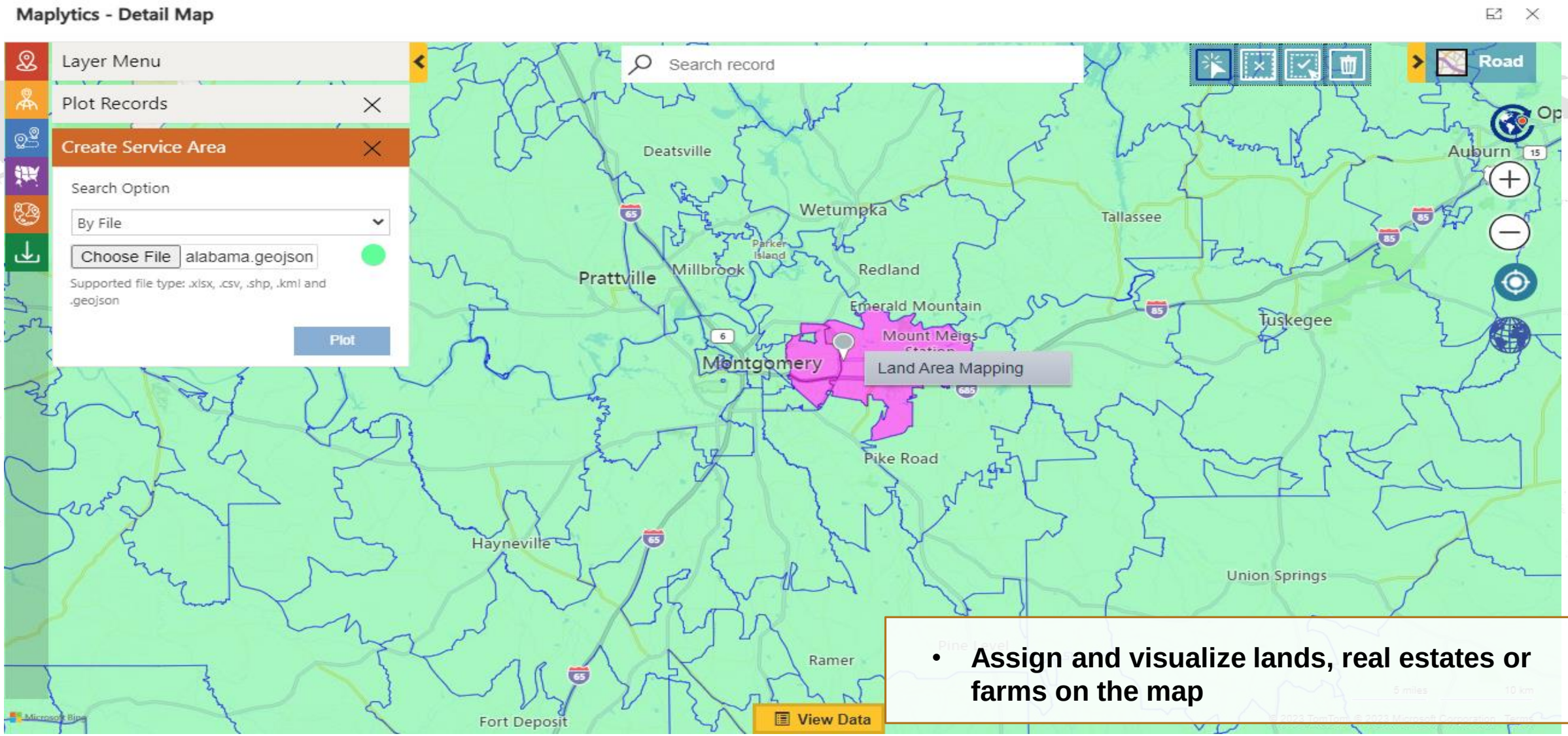
- **5 different ways to plot data**
- **By Location, regions, drawn shapes, territories, and template**
- **Within By Drawing, there is an option of adding by Shape File (.zip, .shp, .kml, or. geojson)**

Search Record



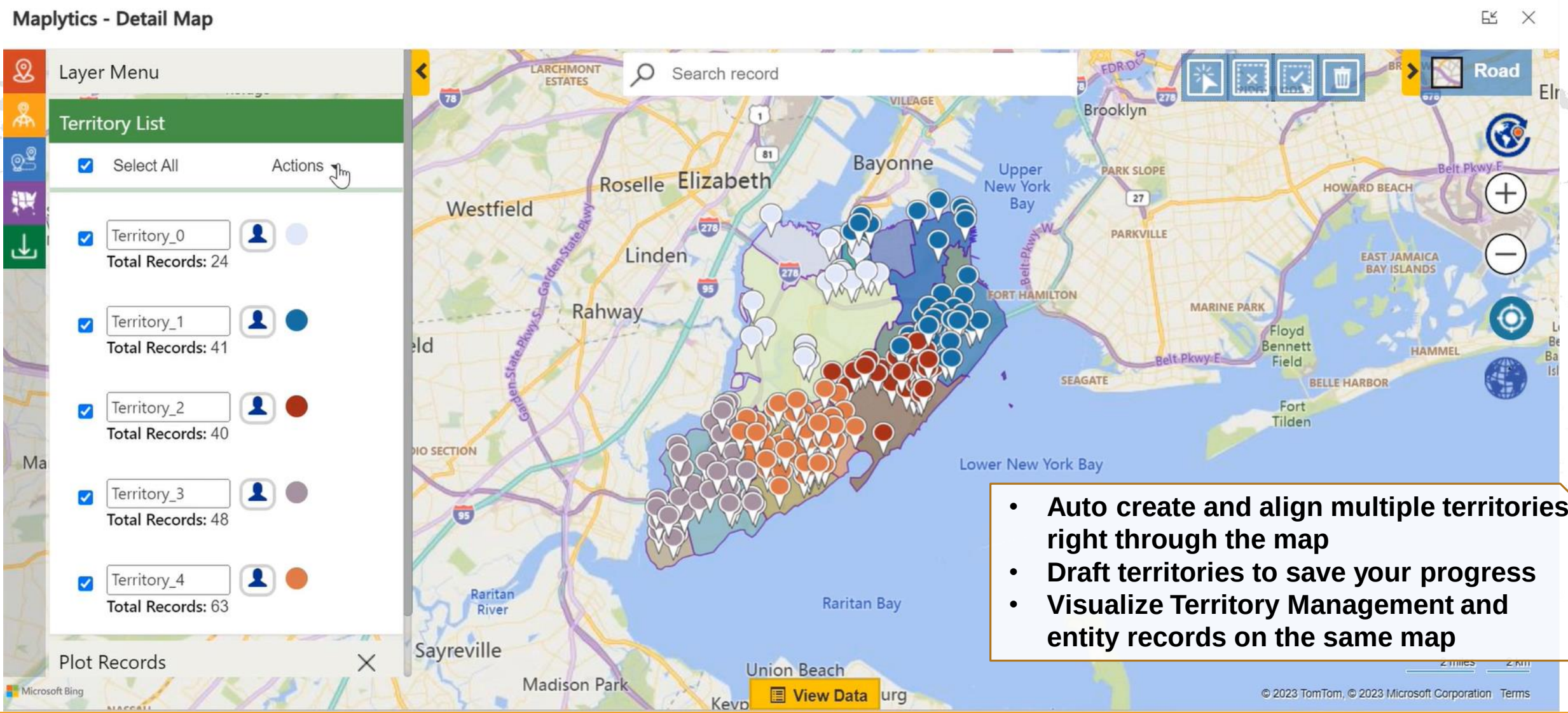
- **The search bar can be used to search any specific record from among the plotted ones using the primary attribute**
- **The preferred record pushpin blinks in quick succession to highlight its position.**

Land Area Mapping



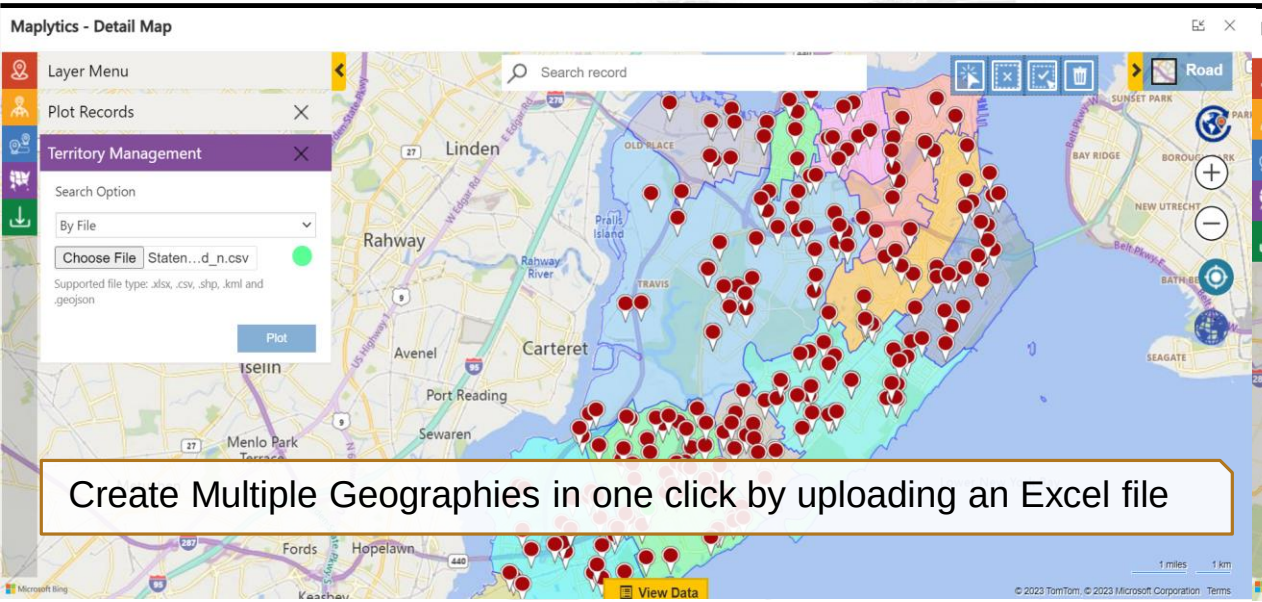
- **Assign and visualize lands, real estates or farms on the map**

AUTO CREATE AND DRAFT TERRITORIES

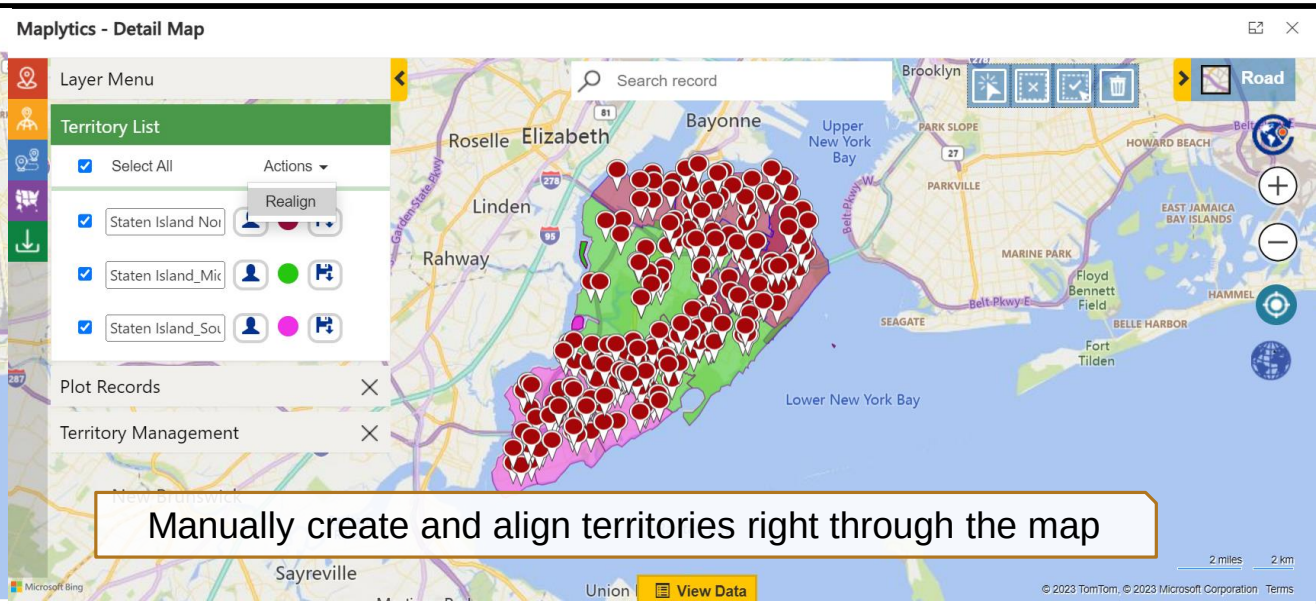


- **Auto create and align multiple territories right through the map**
- **Draft territories to save your progress**
- **Visualize Territory Management and entity records on the same map**

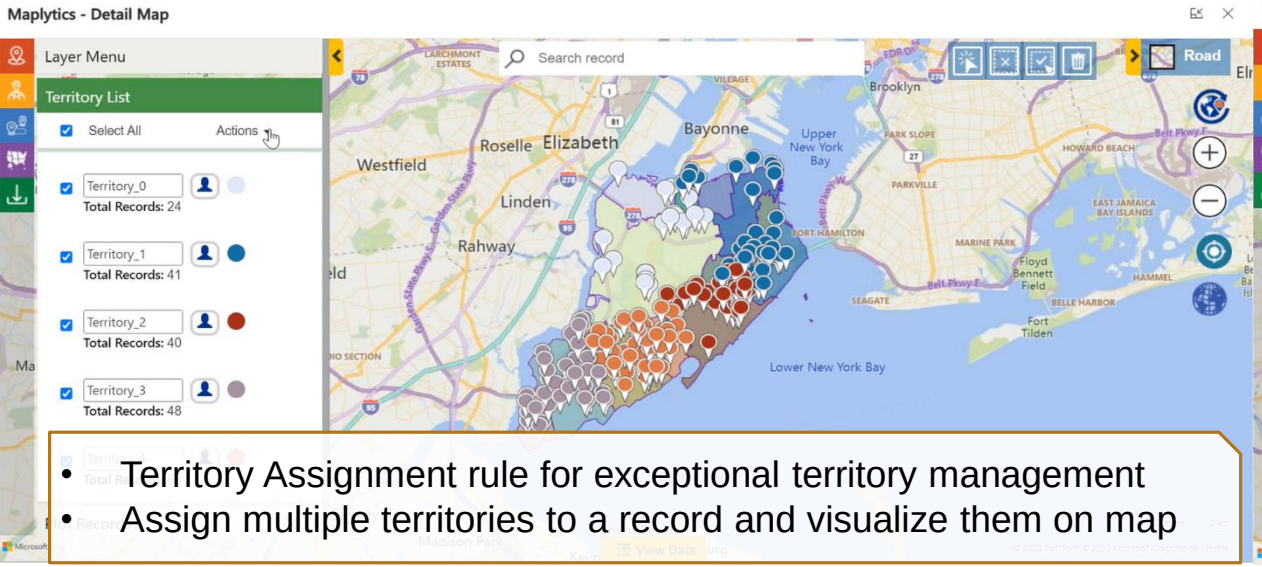
TERRITORY MANAGEMENT



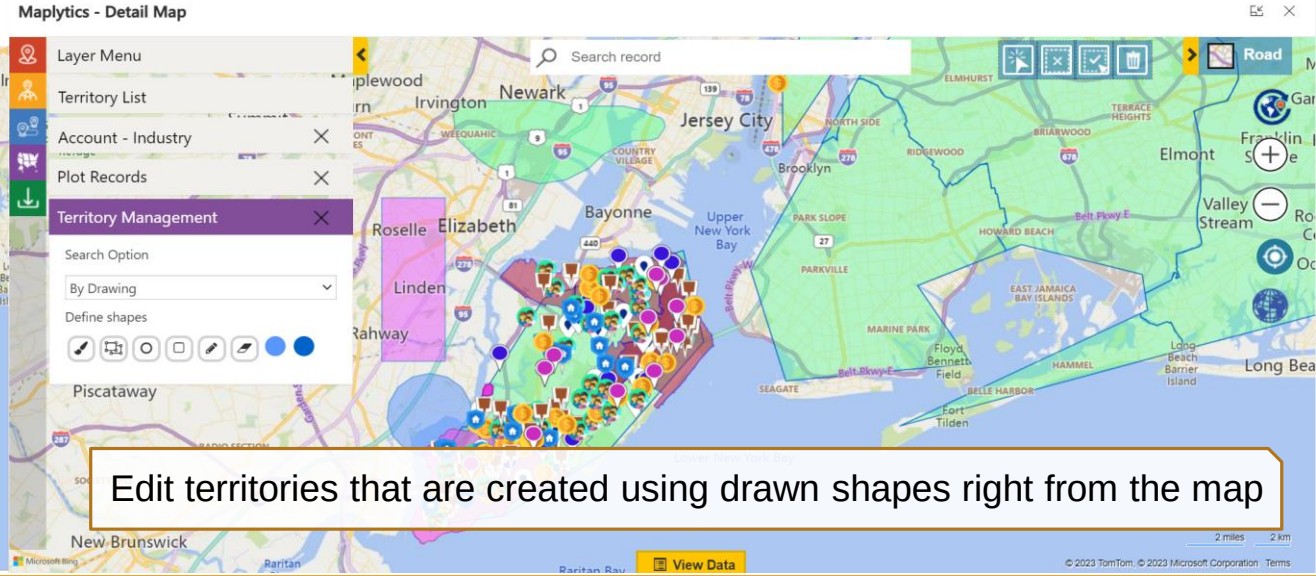
Create Multiple Geographies in one click by uploading an Excel file



Manually create and align territories right through the map

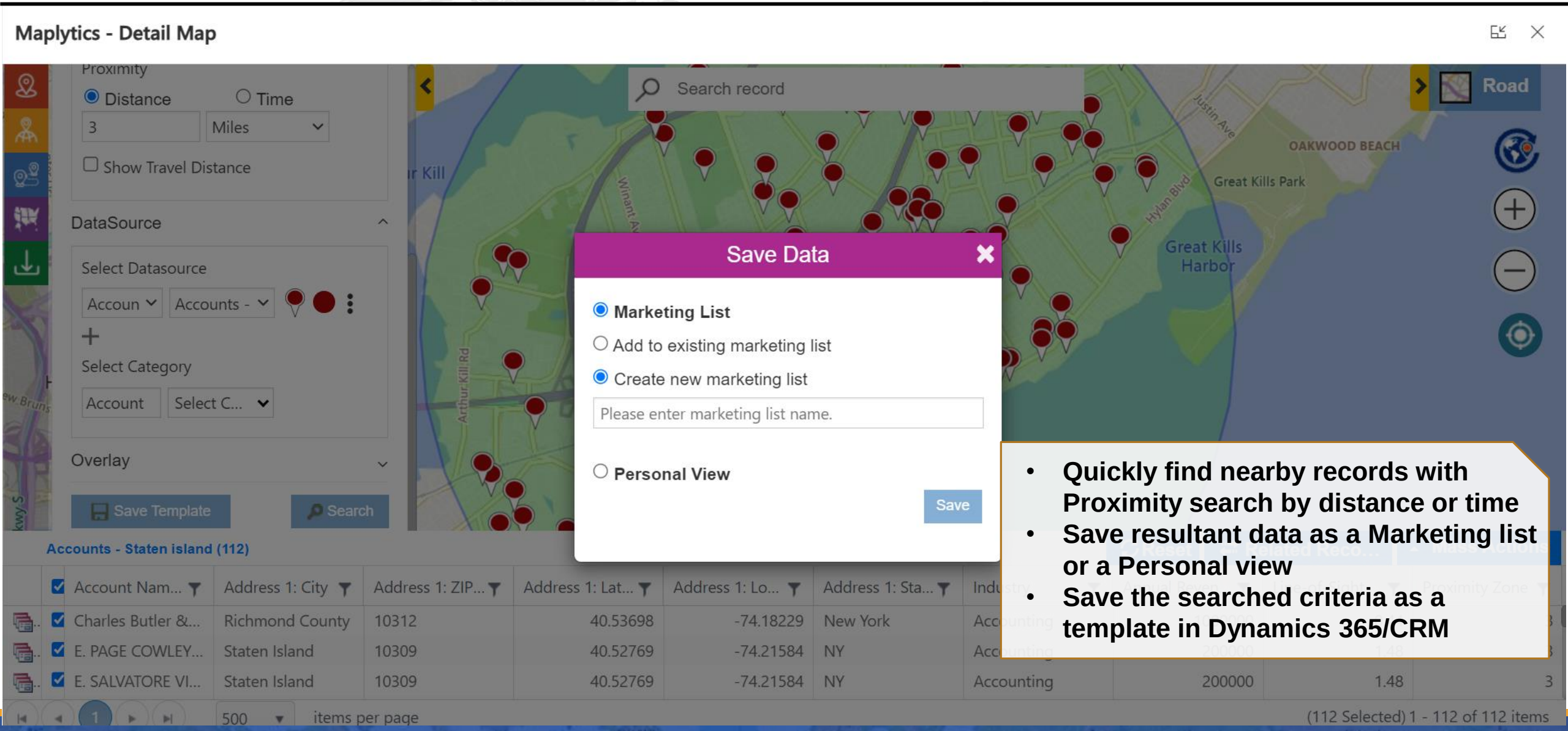


- Territory Assignment rule for exceptional territory management
- Assign multiple territories to a record and visualize them on map



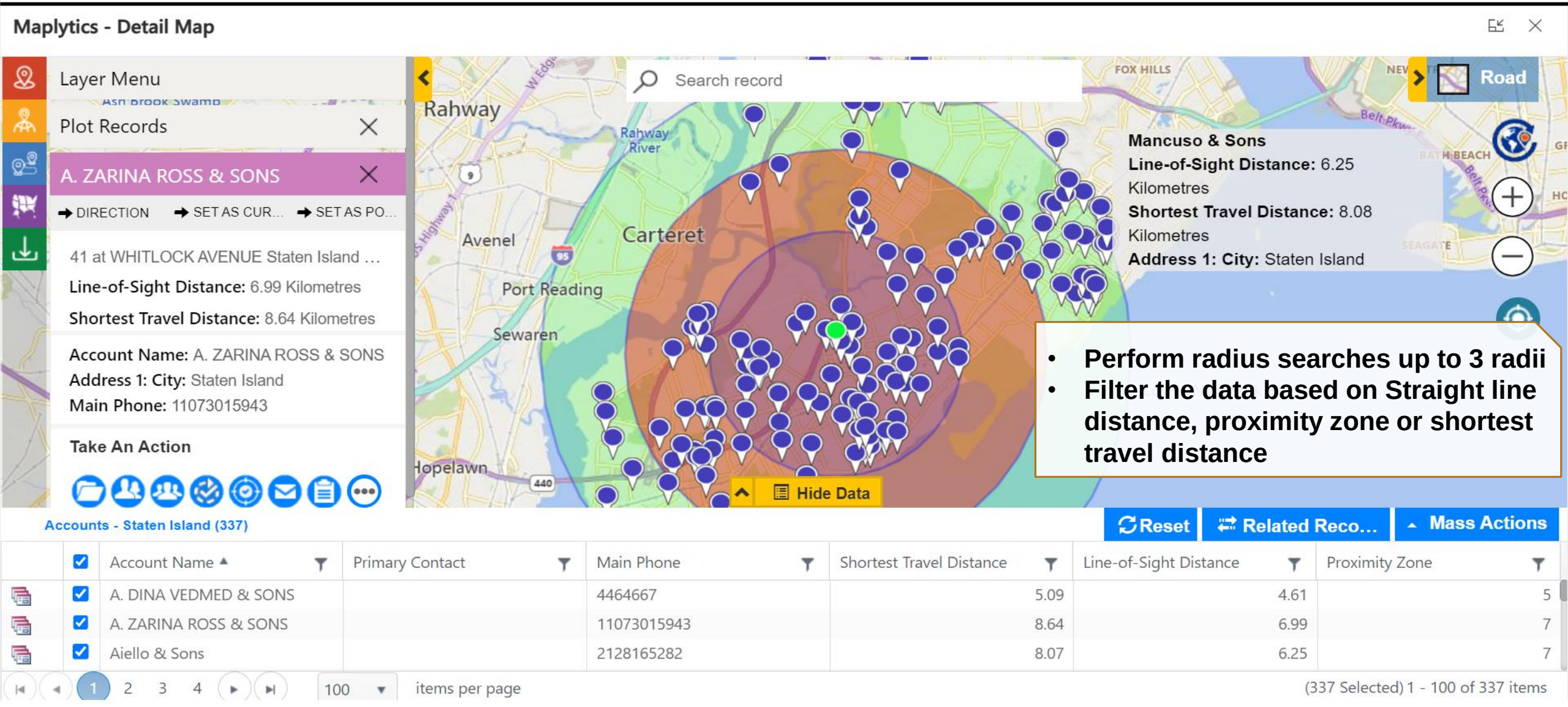
Edit territories that are created using drawn shapes right from the map

PROXIMITY SEARCH



- Quickly find nearby records with Proximity search by distance or time
- Save resultant data as a Marketing list or a Personal view
- Save the searched criteria as a template in Dynamics 365/CRM

CONCENTRIC PROXIMITY SEARCH

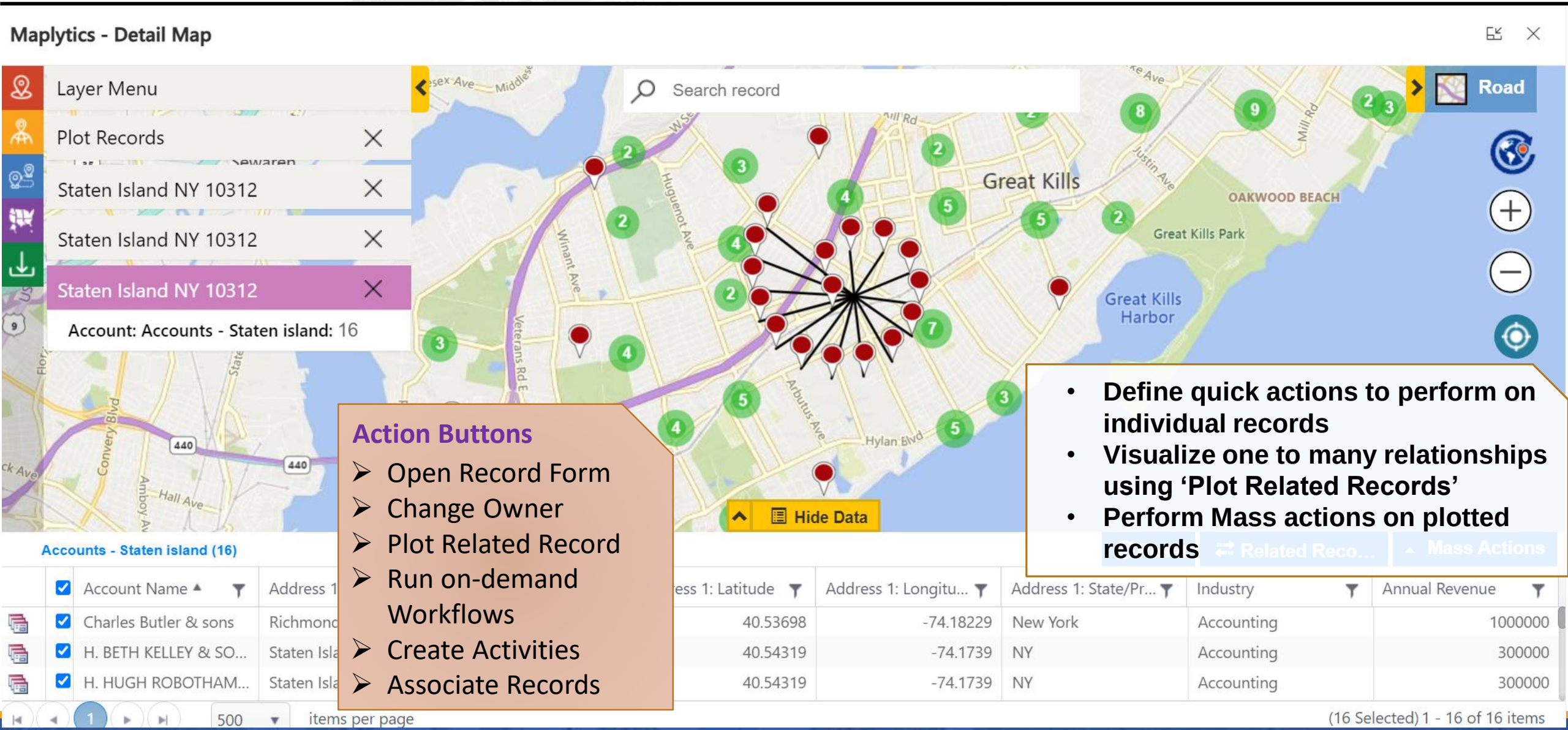


- Perform radius searches up to 3 radii
- Filter the data based on Straight line distance, proximity zone or shortest travel distance

Account Name	Primary Contact	Main Phone	Shortest Travel Distance	Line-of-Sight Distance	Proximity Zone
A. DINA VEDMED & SONS		4464667	5.09	4.61	5
A. ZARINA ROSS & SONS		11073015943	8.64	6.99	7
Aiello & Sons		2128165282	8.07	6.25	7

1 2 3 4 100 items per page (337 Selected) 1 - 100 of 337 items

QUICK CALL TO ACTIONS

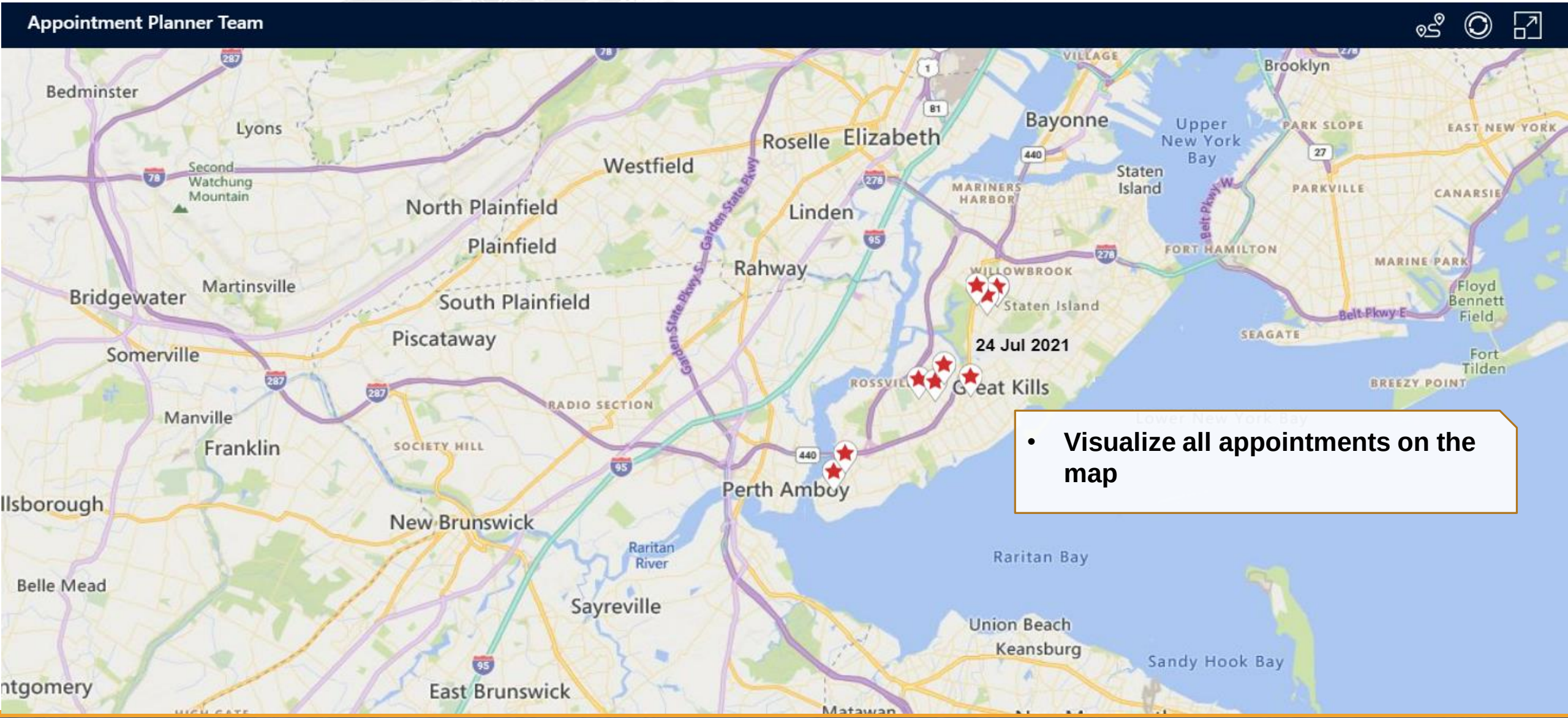


Action Buttons

- Open Record Form
- Change Owner
- Plot Related Record
- Run on-demand Workflows
- Create Activities
- Associate Records

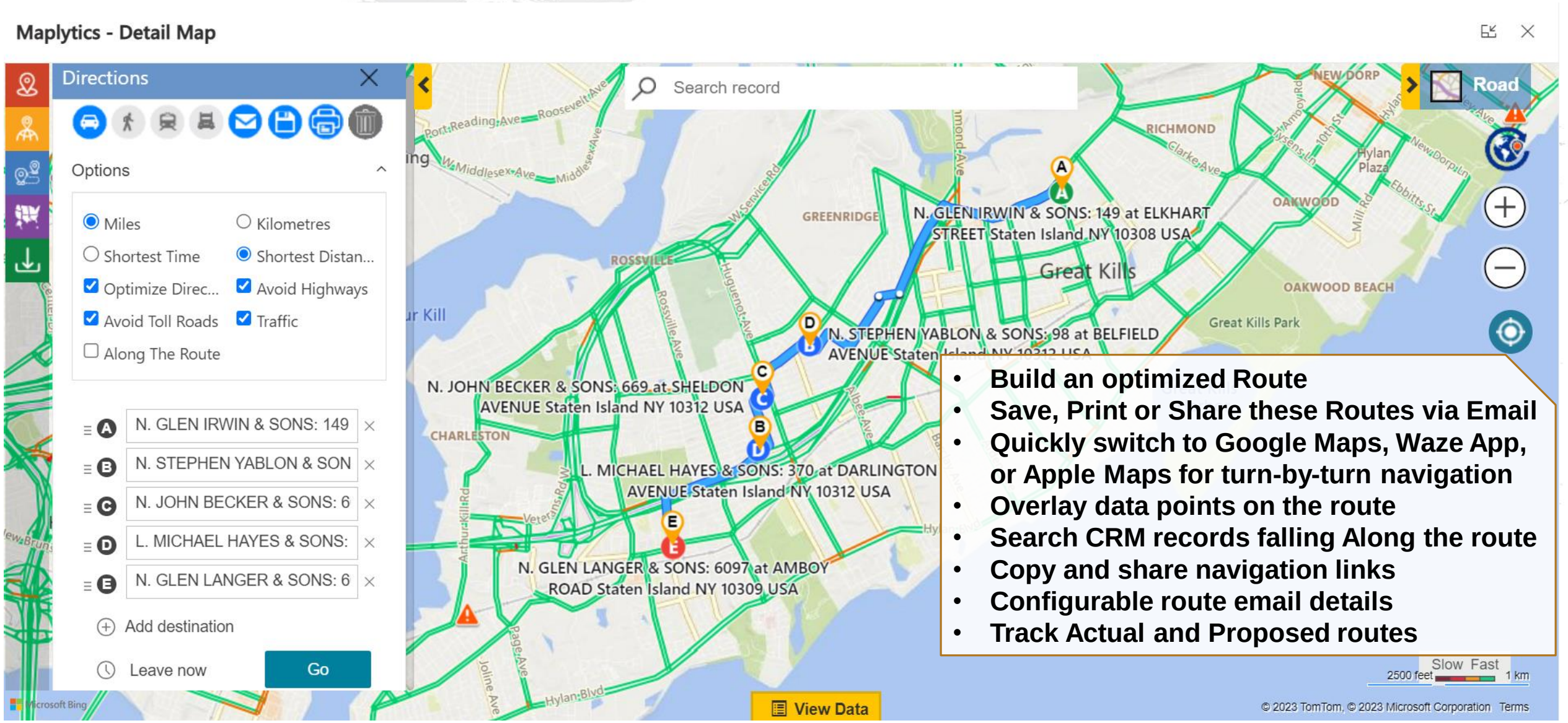
- **Define quick actions to perform on individual records**
- **Visualize one to many relationships using 'Plot Related Records'**
- **Perform Mass actions on plotted records**

APPOINTMENT PLANNER



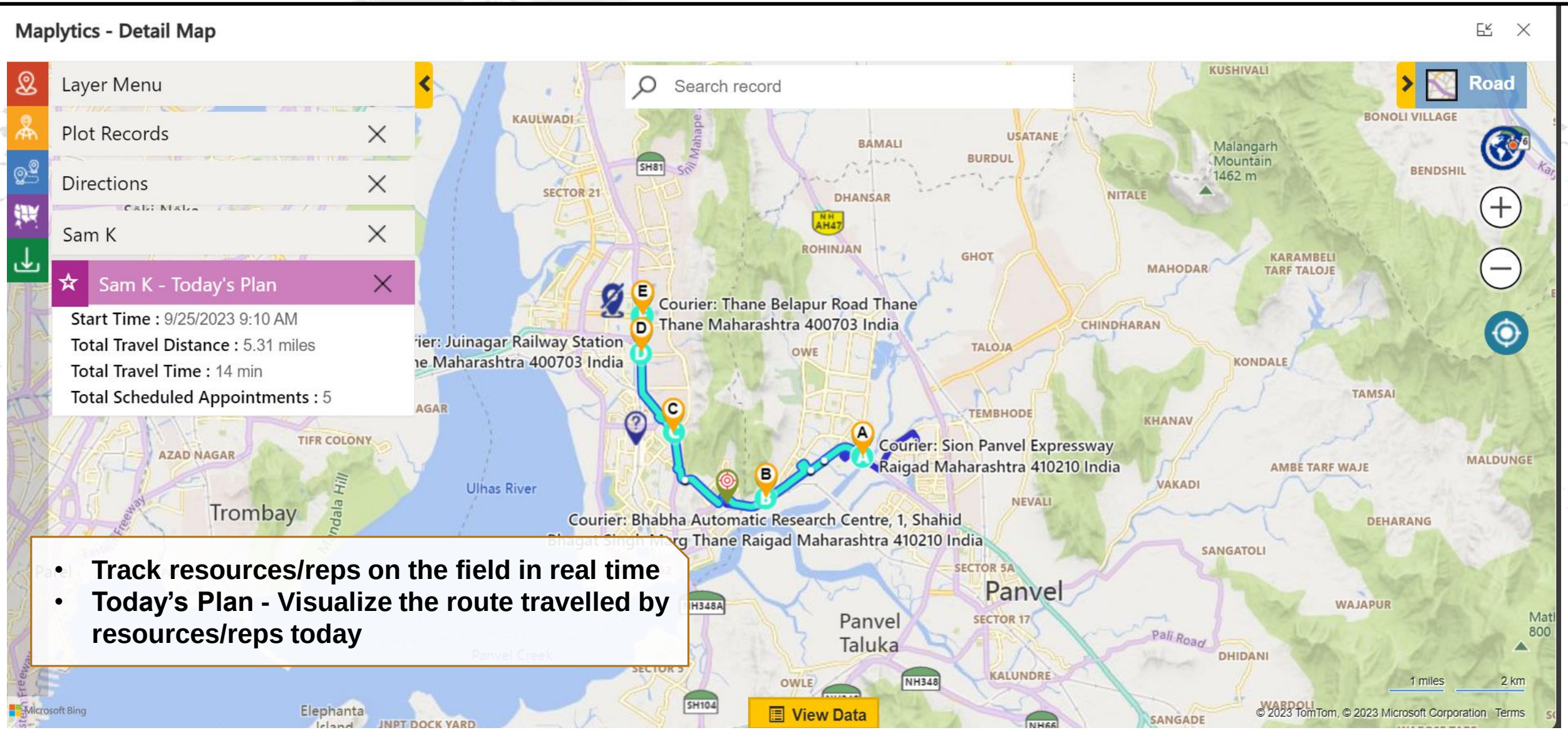
- **Visualize all appointments on the map**

ROUTE OPTIMIZATION & SHARING



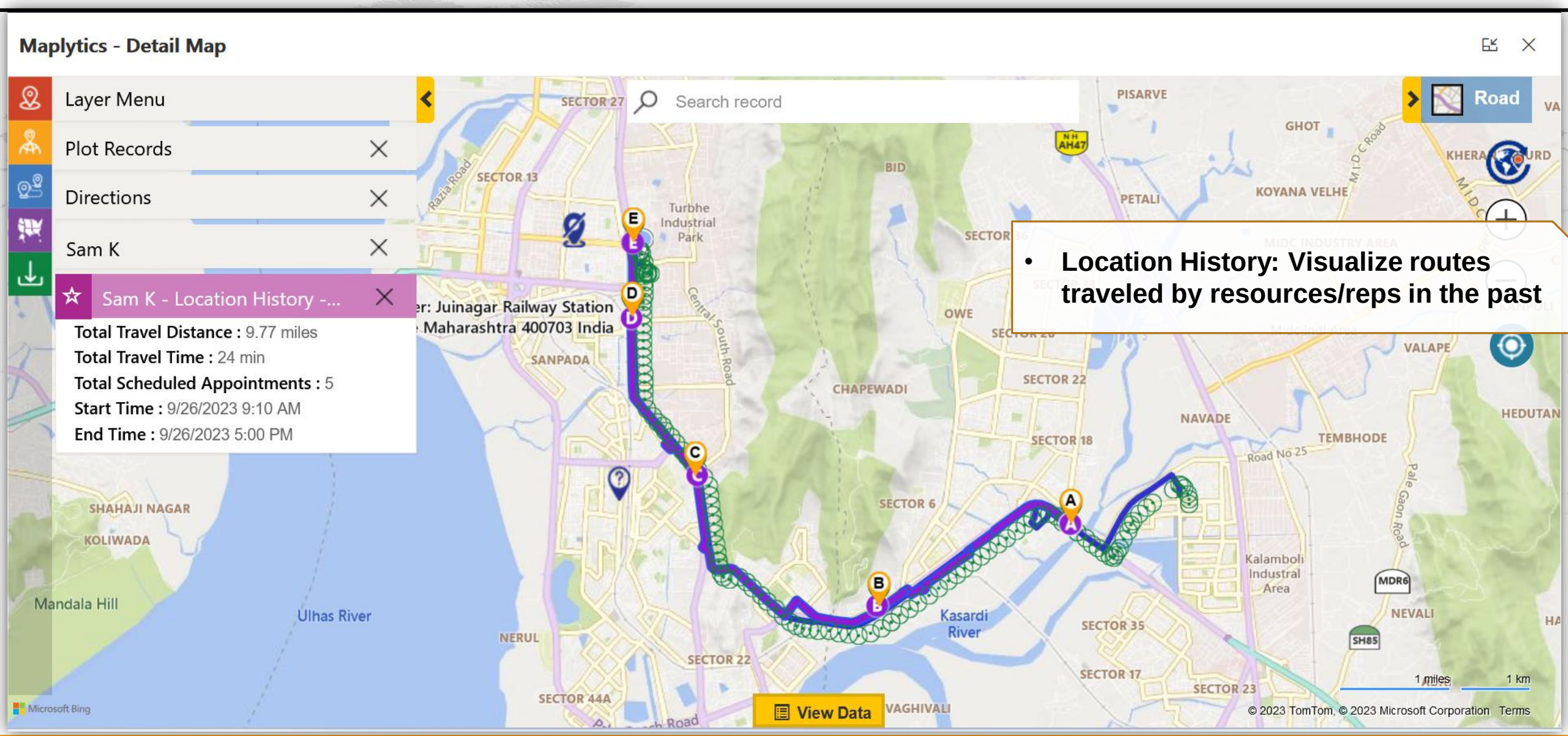
- **Build an optimized Route**
- **Save, Print or Share these Routes via Email**
- **Quickly switch to Google Maps, Waze App, or Apple Maps for turn-by-turn navigation**
- **Overlay data points on the route**
- **Search CRM records falling Along the route**
- **Copy and share navigation links**
- **Configurable route email details**
- **Track Actual and Proposed routes**

Real Time Tracking

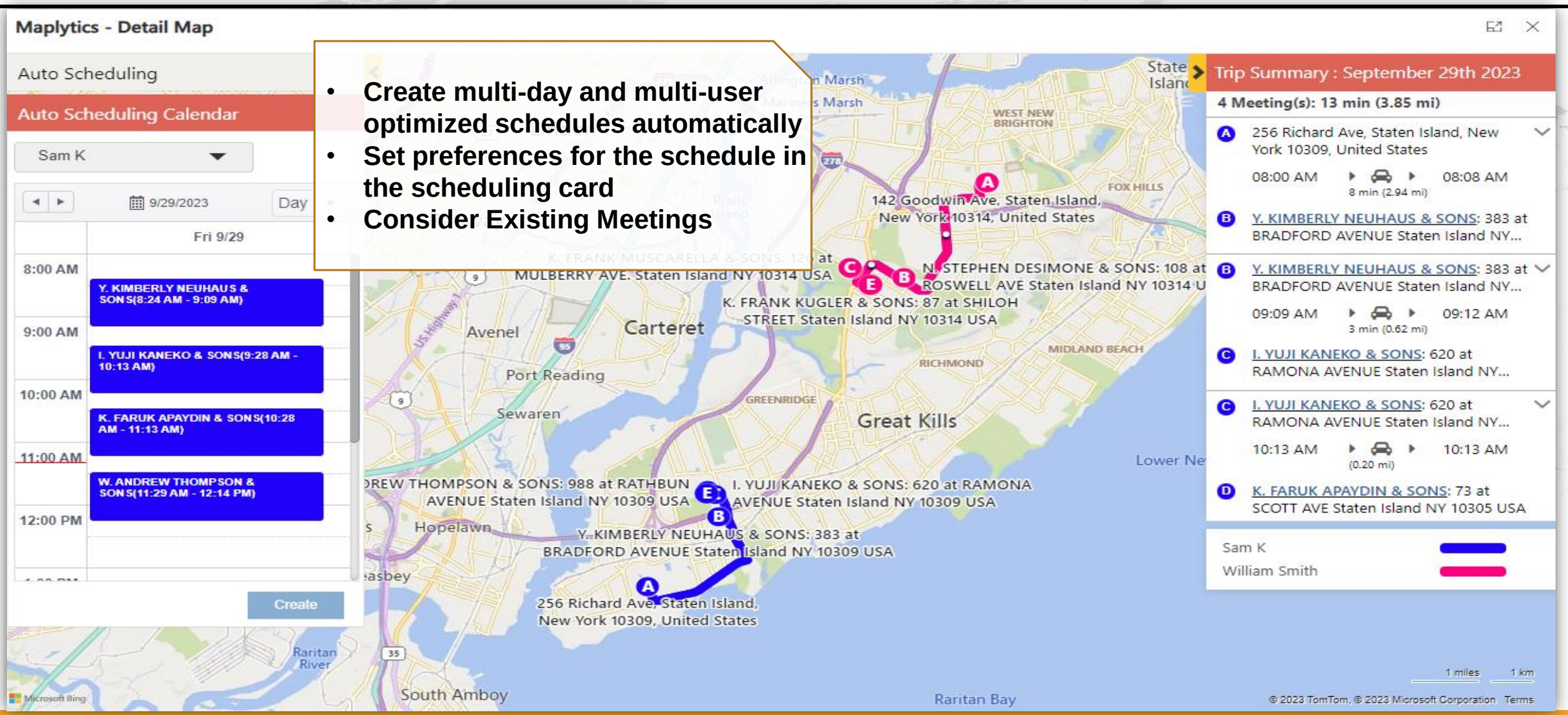


- **Track resources/reps on the field in real time**
- **Today's Plan - Visualize the route travelled by resources/reps today**

Real Time Tracking



AUTO SCHEDULING



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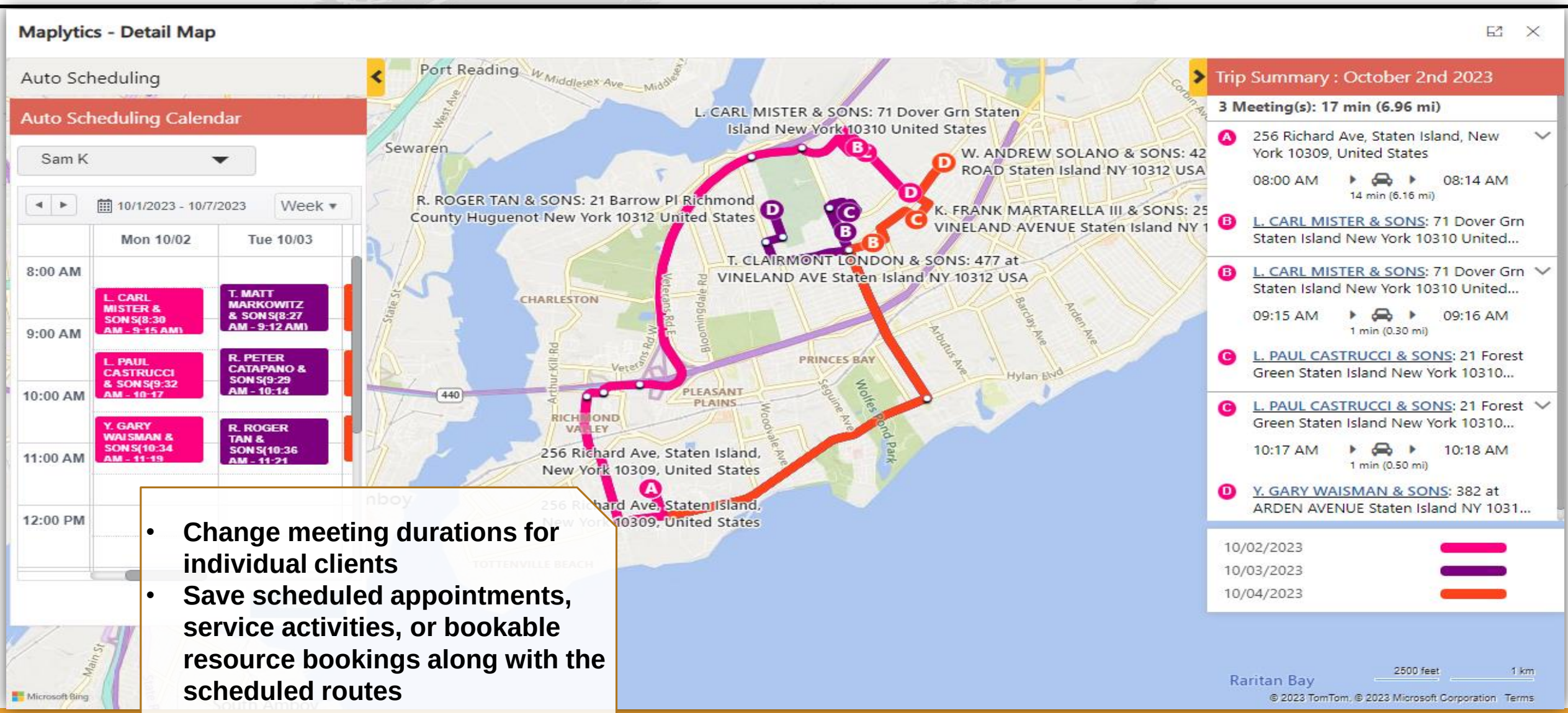
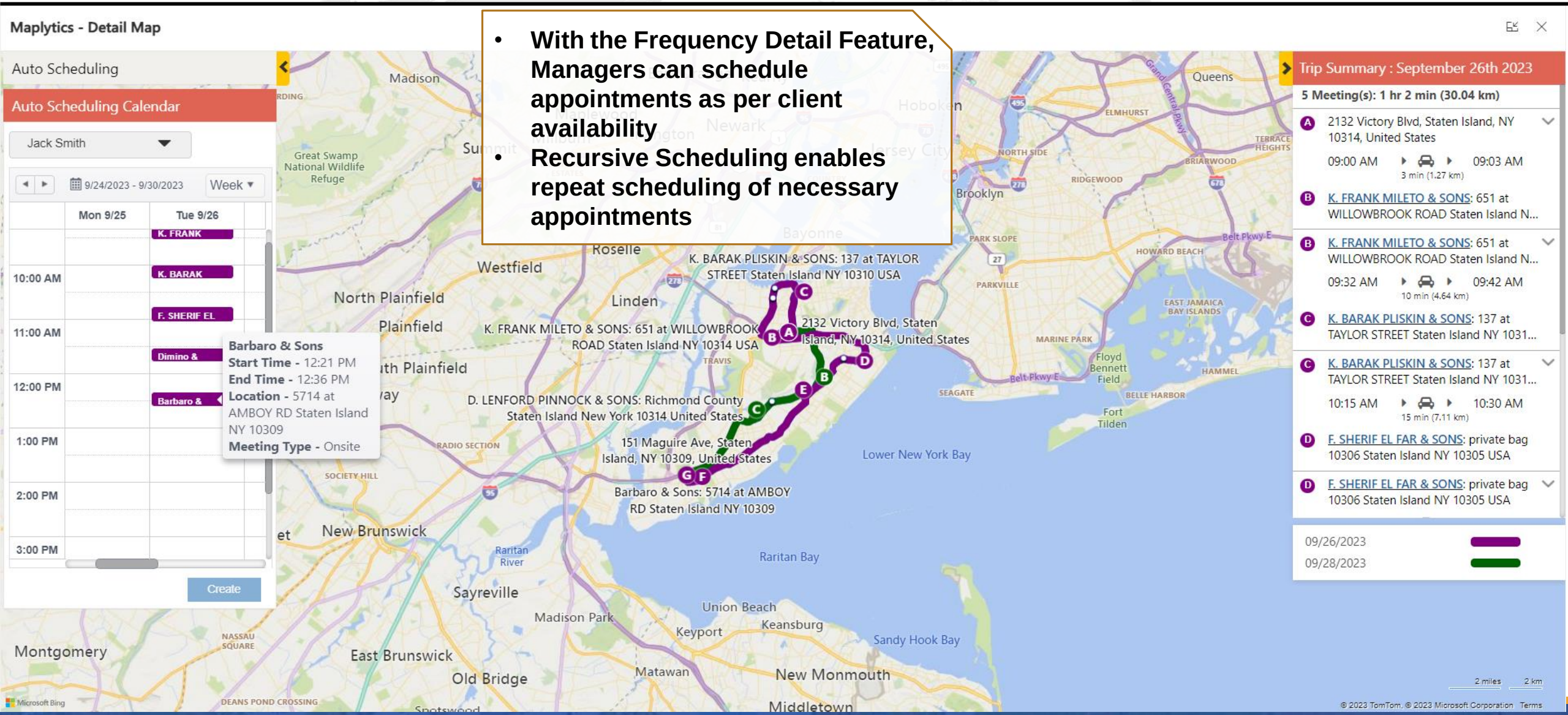


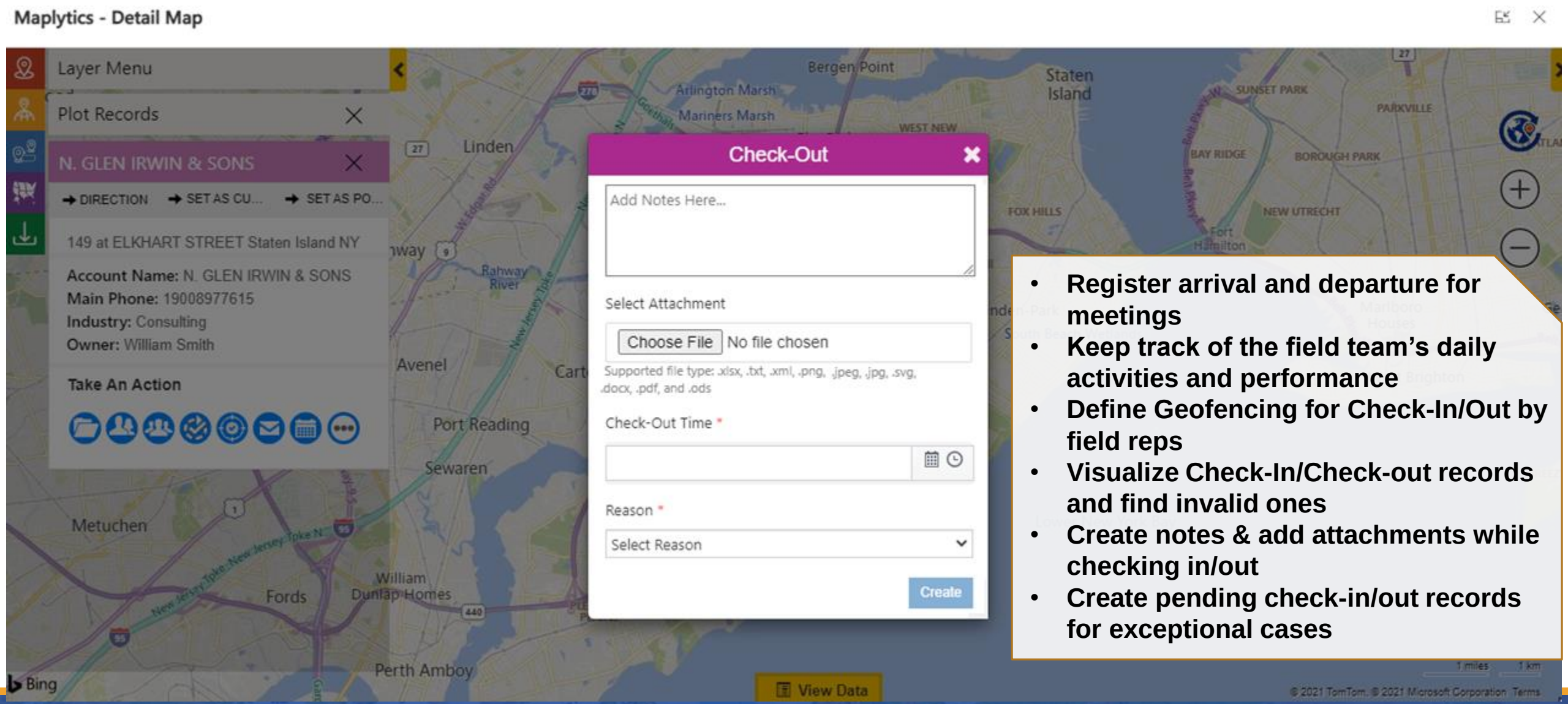
- **Change meeting durations for individual clients**
- **Save scheduled appointments, service activities, or bookable resource bookings along with the scheduled routes**

AUTO SCHEDULING

- With the Frequency Detail Feature, Managers can schedule appointments as per client availability
- Recursive Scheduling enables repeat scheduling of necessary appointments

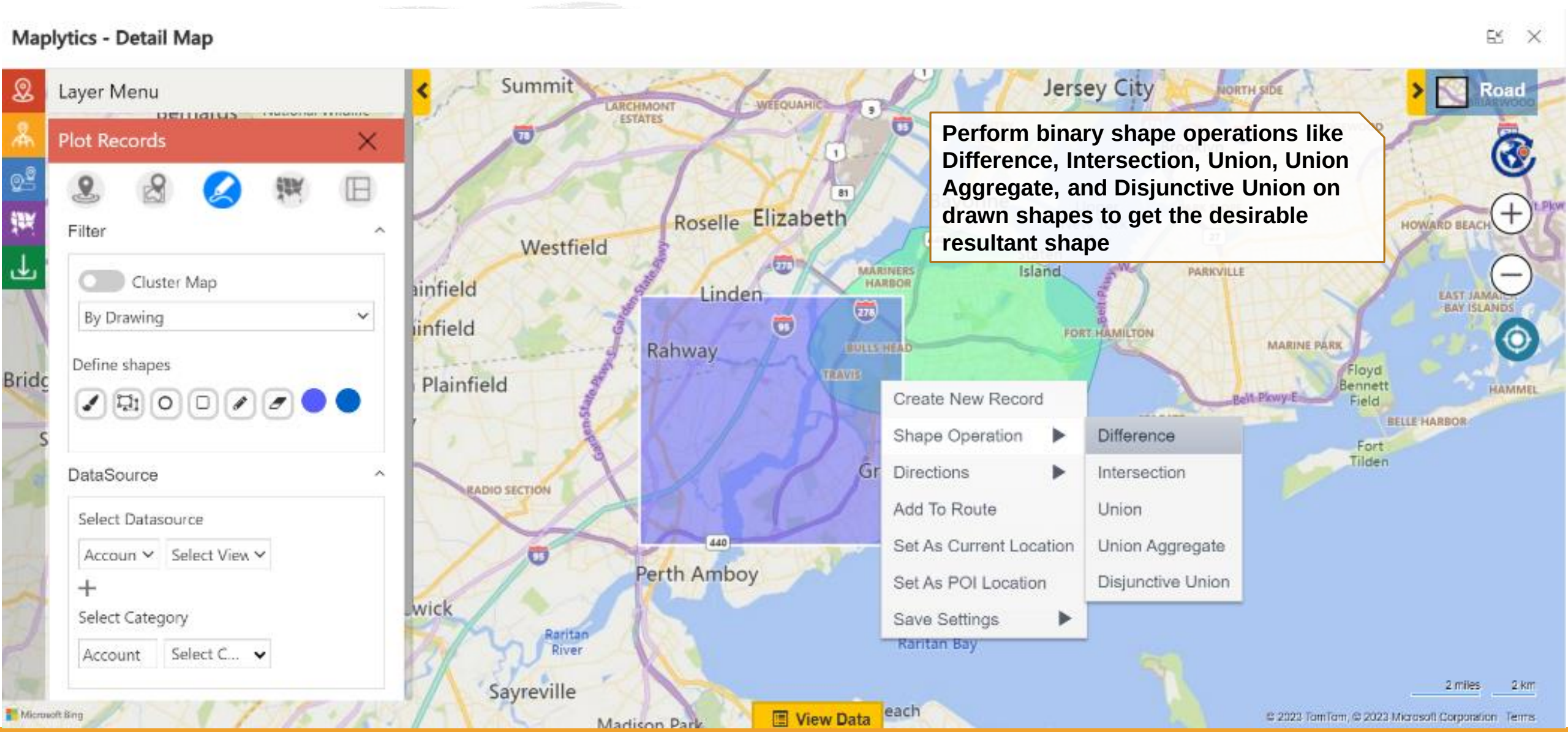


CHECK-IN/CHECK-OUT ON FIELD

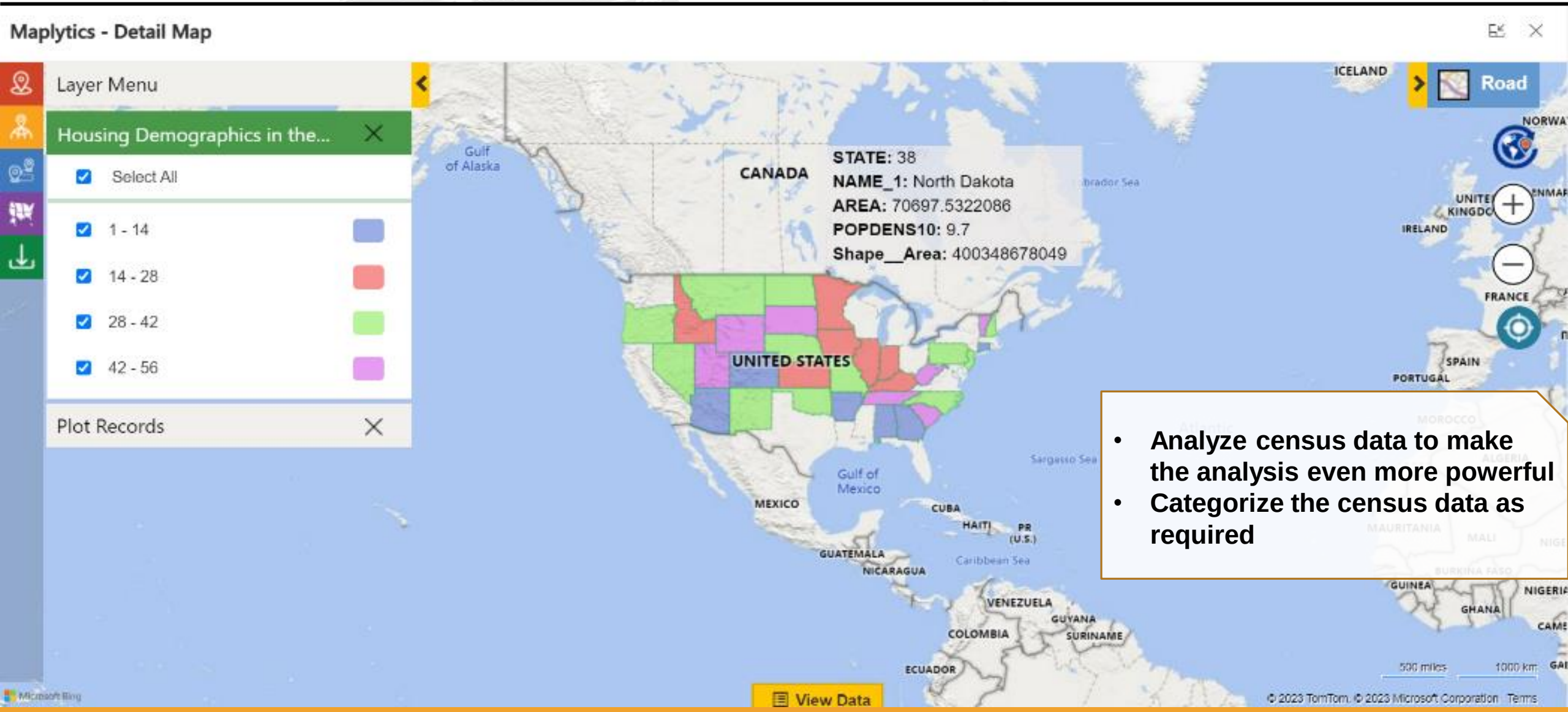


- **Register arrival and departure for meetings**
- **Keep track of the field team's daily activities and performance**
- **Define Geofencing for Check-In/Out by field reps**
- **Visualize Check-In/Check-out records and find invalid ones**
- **Create notes & add attachments while checking in/out**
- **Create pending check-in/out records for exceptional cases**

SHAPE OPERATIONS

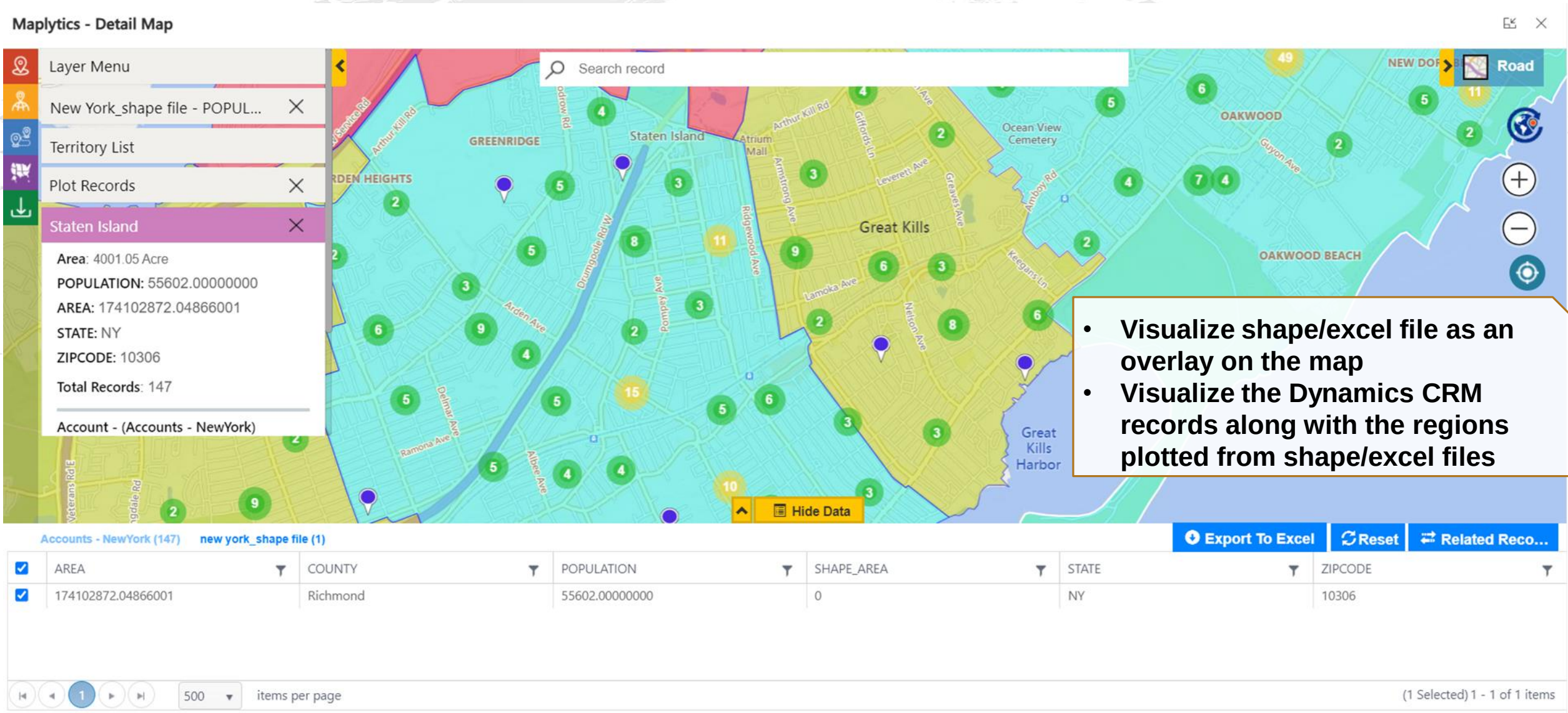


CENSUS DATA VISUALIZATION



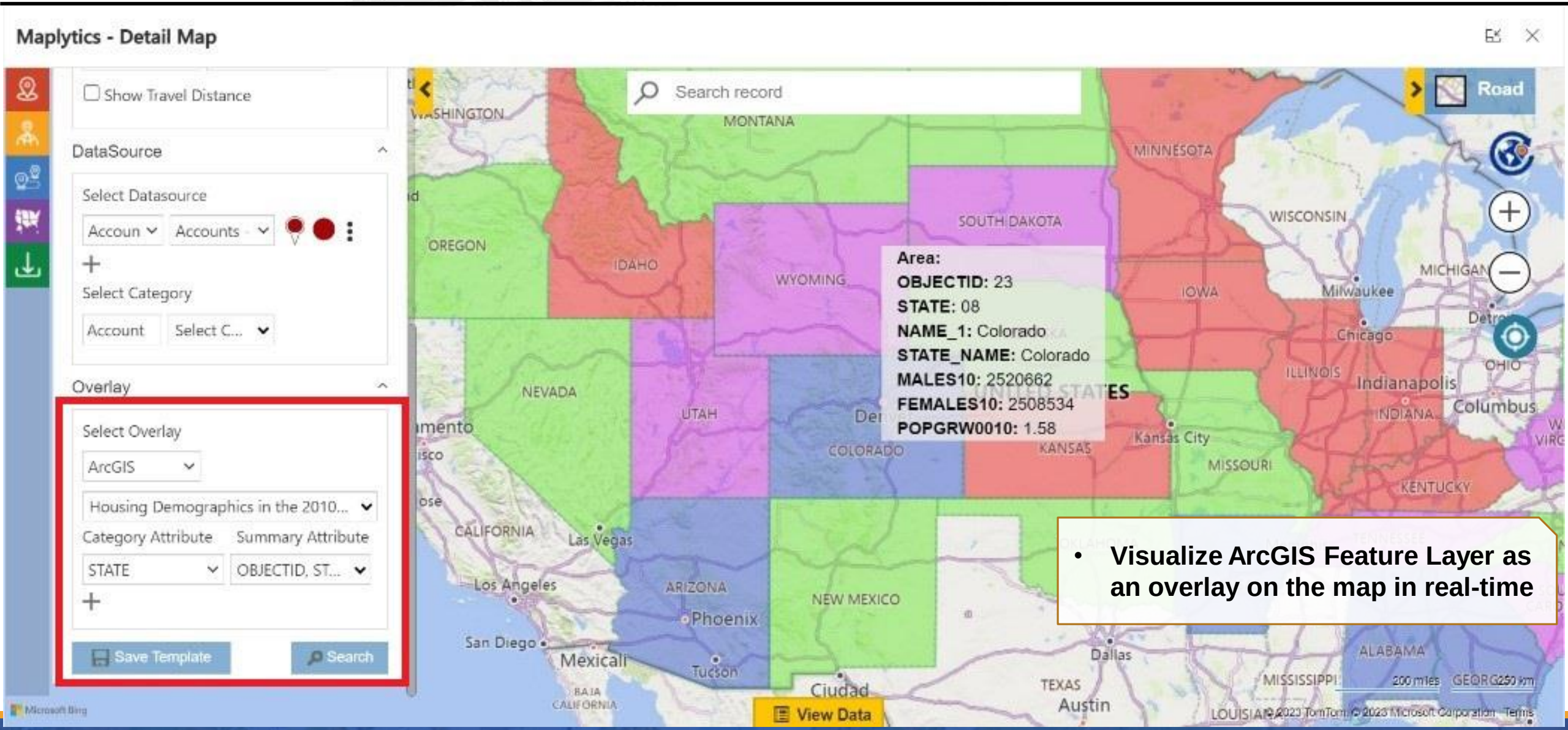
- Analyze census data to make the analysis even more powerful
- Categorize the census data as required

SHAPE/EXCEL FILE LAYER INTEGRATION



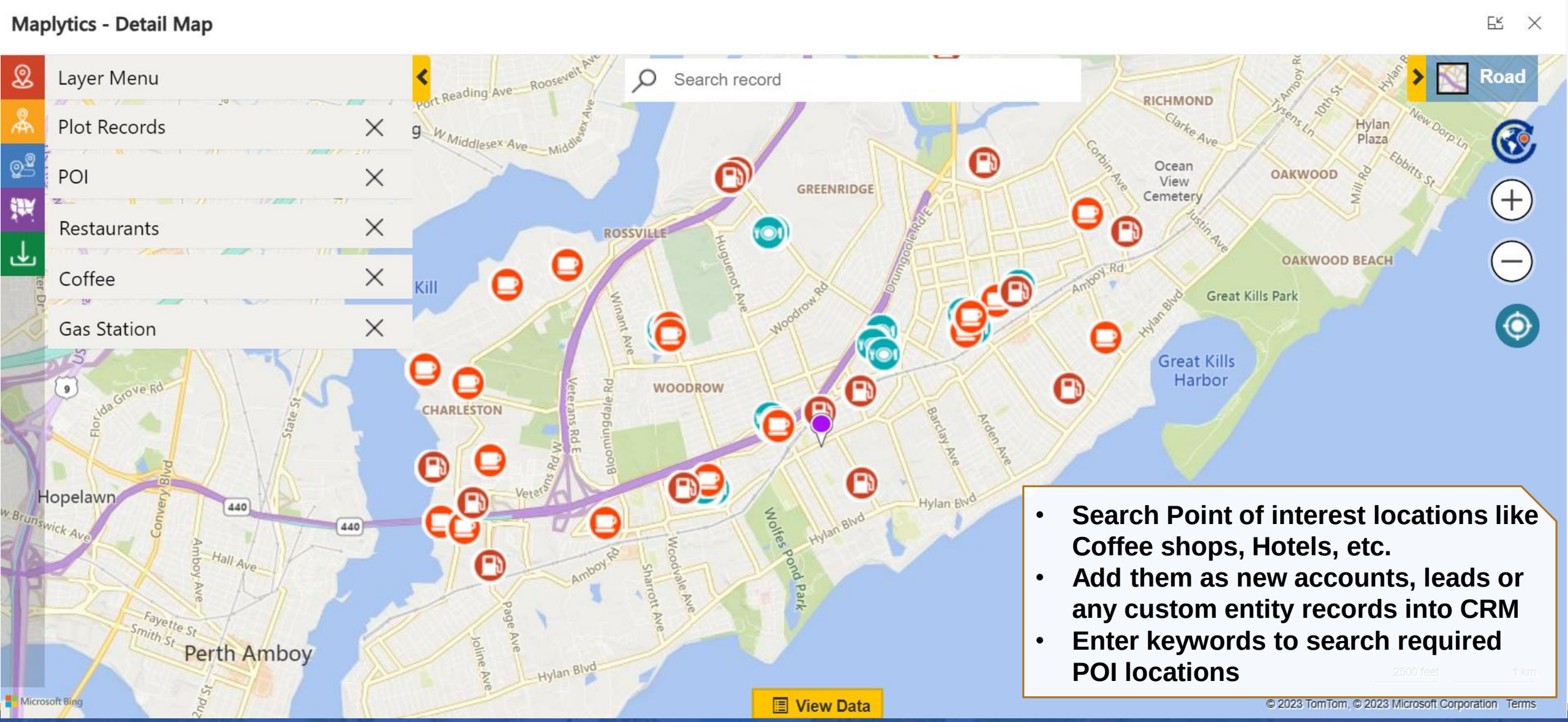
- **Visualize shape/excel file as an overlay on the map**
- **Visualize the Dynamics CRM records along with the regions plotted from shape/excel files**

ArcGIS FEATURE LAYER INTEGRATION



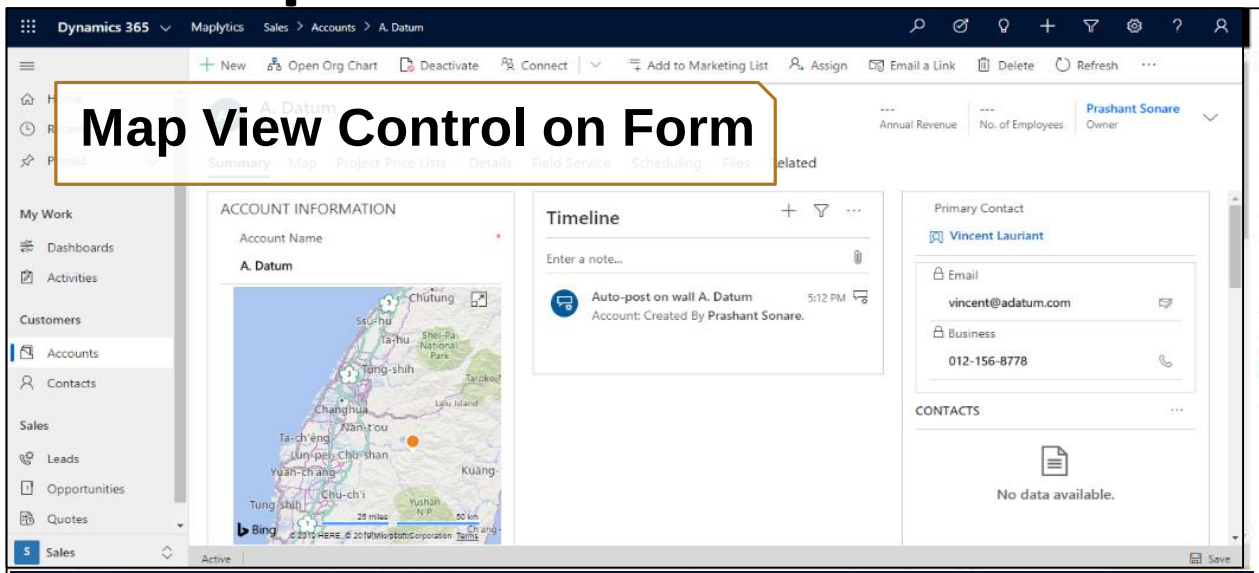
- **Visualize ArcGIS Feature Layer as an overlay on the map in real-time**

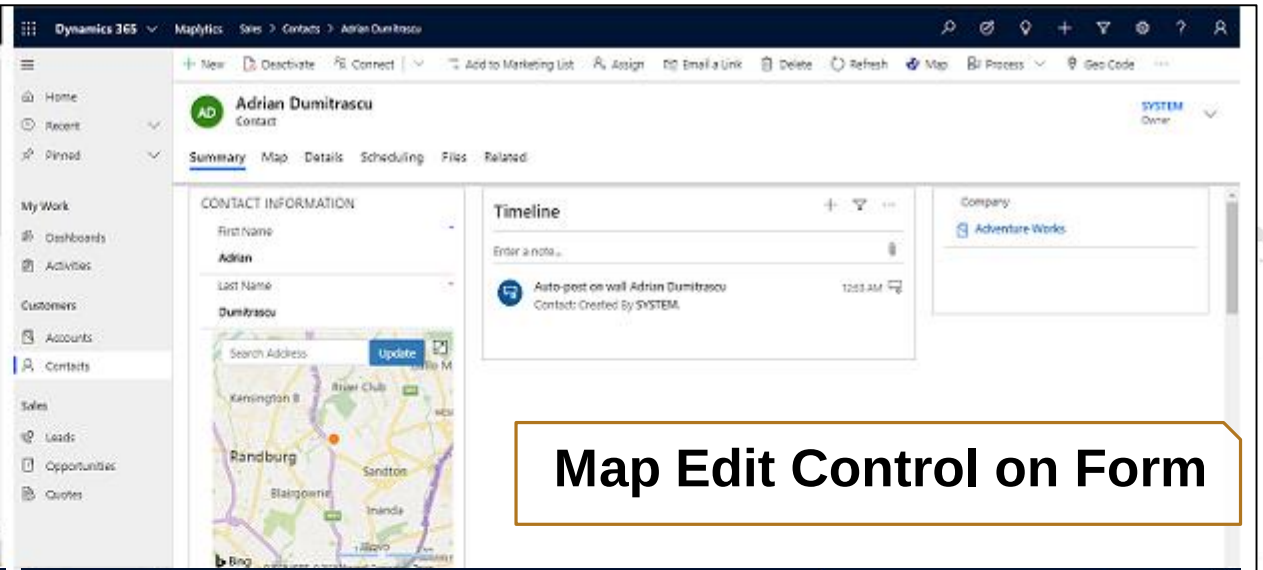
NEARBY PLACES

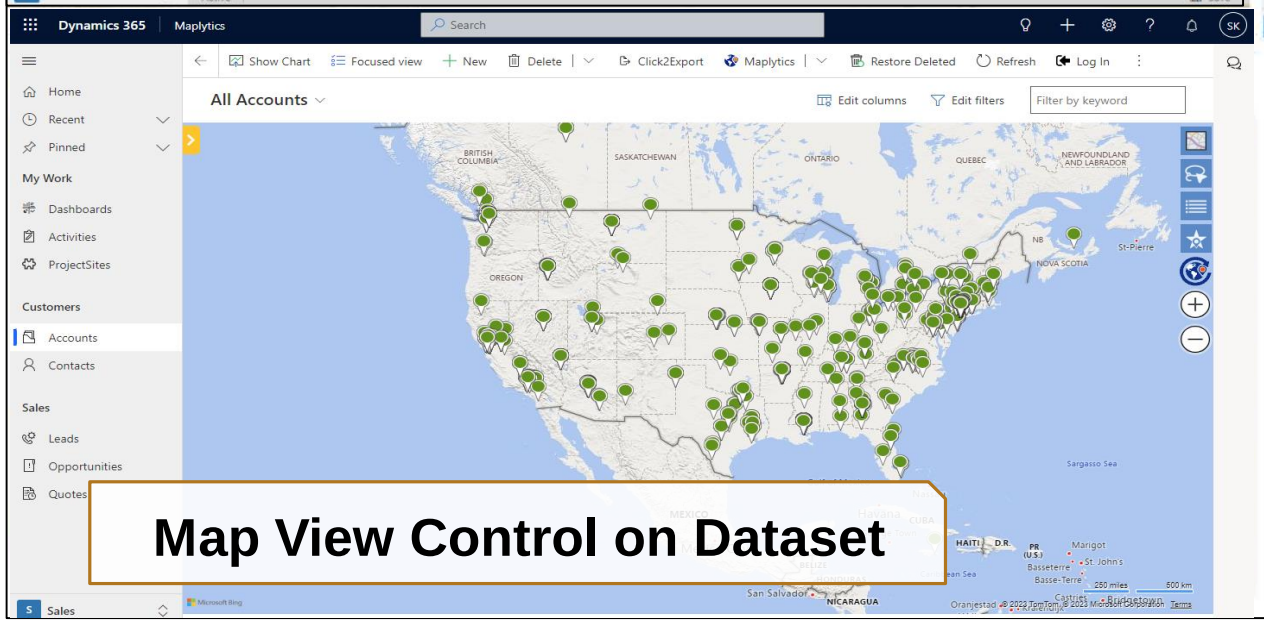


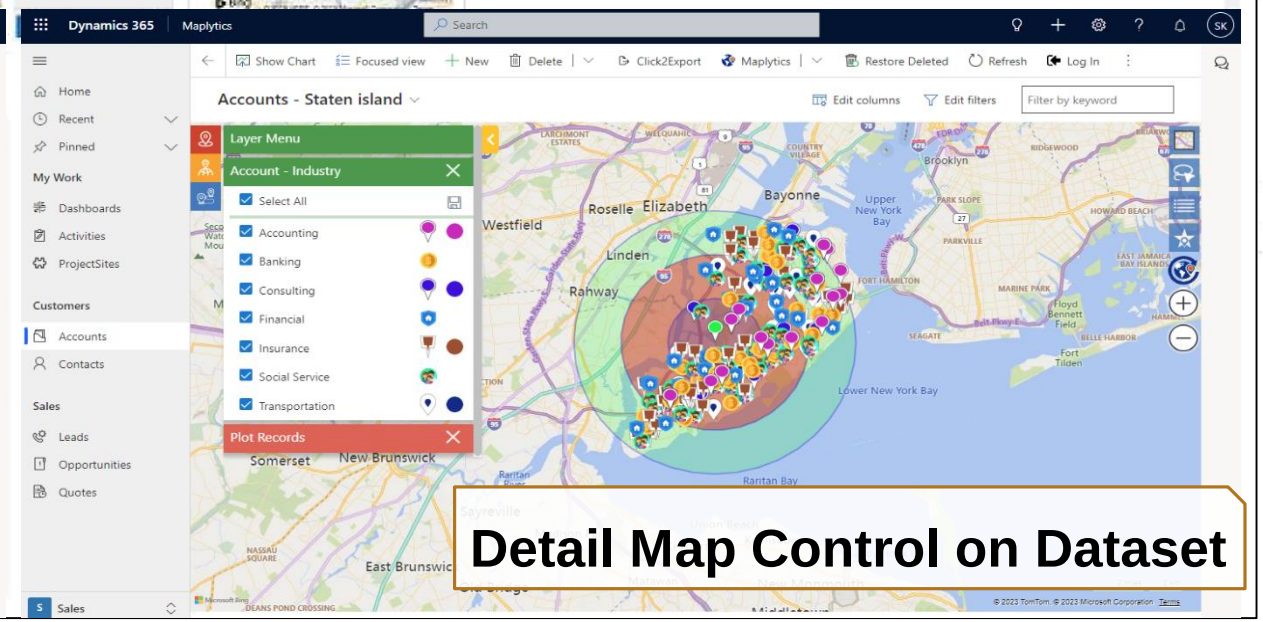
- **Search Point of interest locations like Coffee shops, Hotels, etc.**
- **Add them as new accounts, leads or any custom entity records into CRM**
- **Enter keywords to search required POI locations**

PCF Map Controls

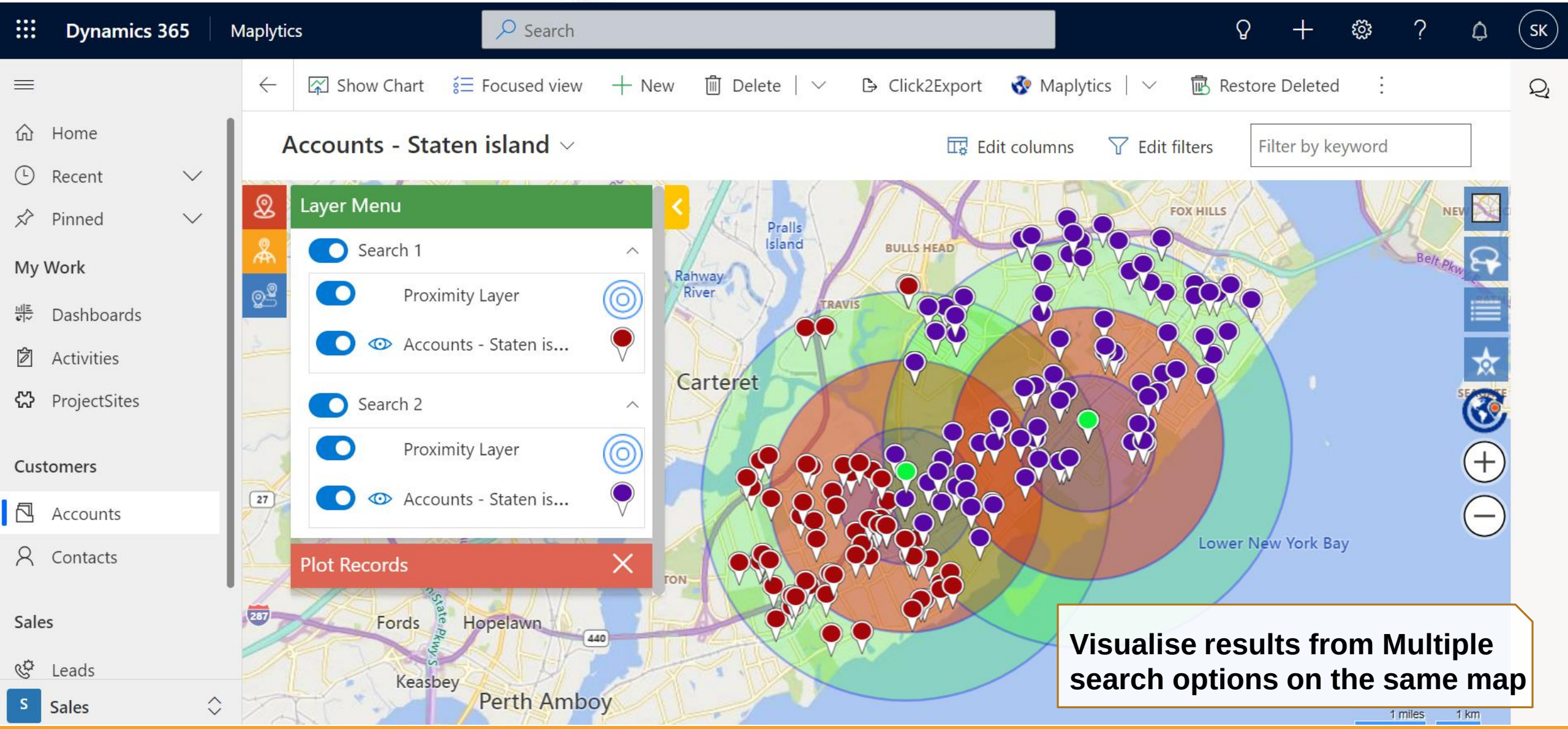






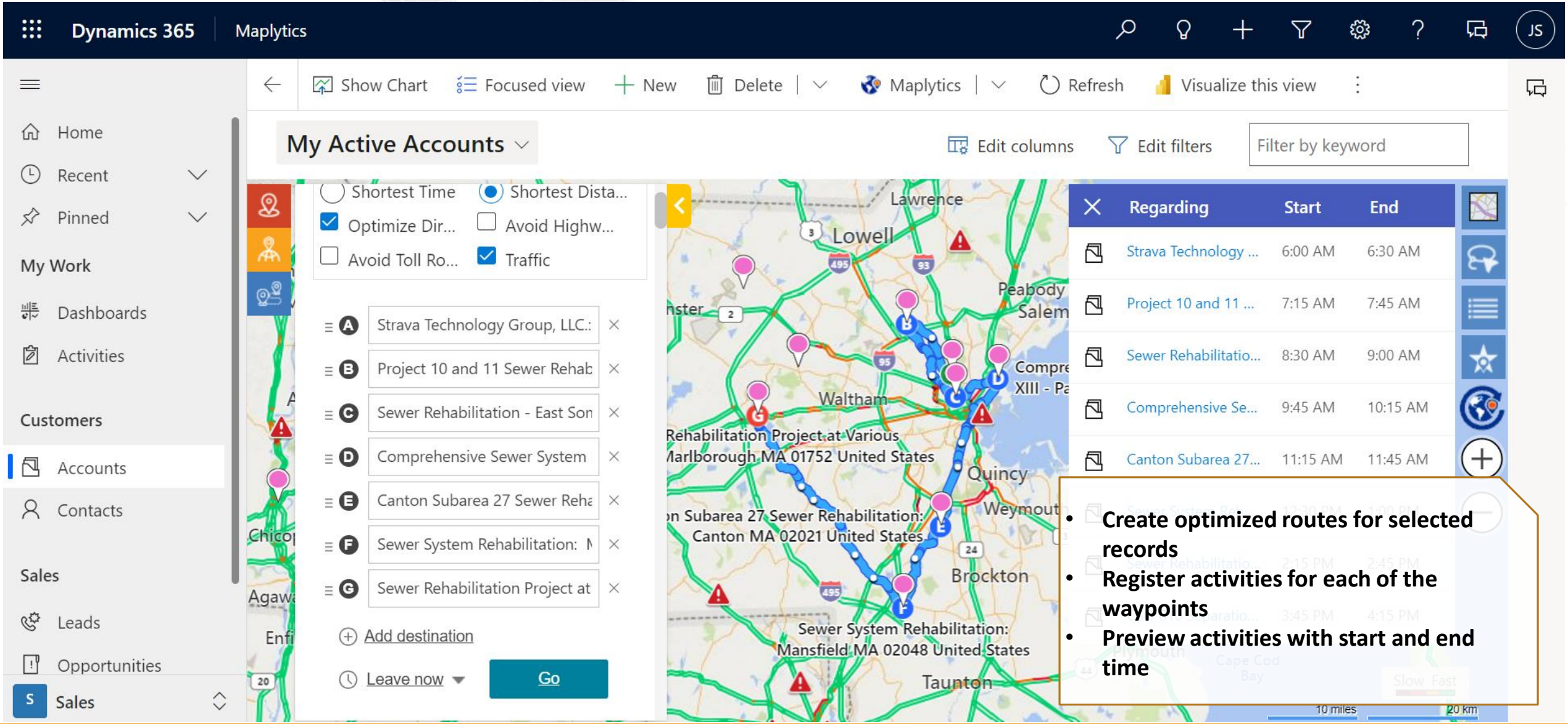


Multiple Search Layers in Detail Map Control



Visualise results from Multiple search options on the same map

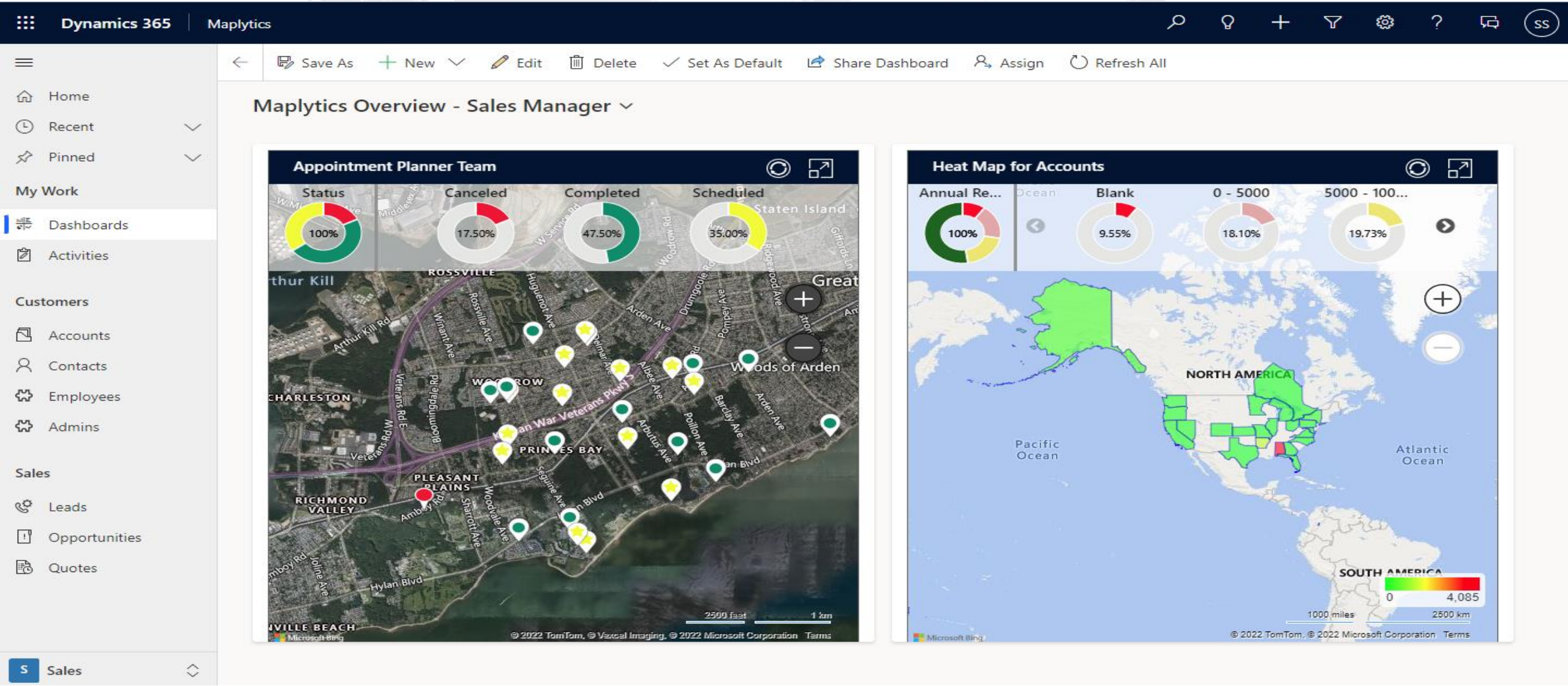
Smart Route in Detail Map Control



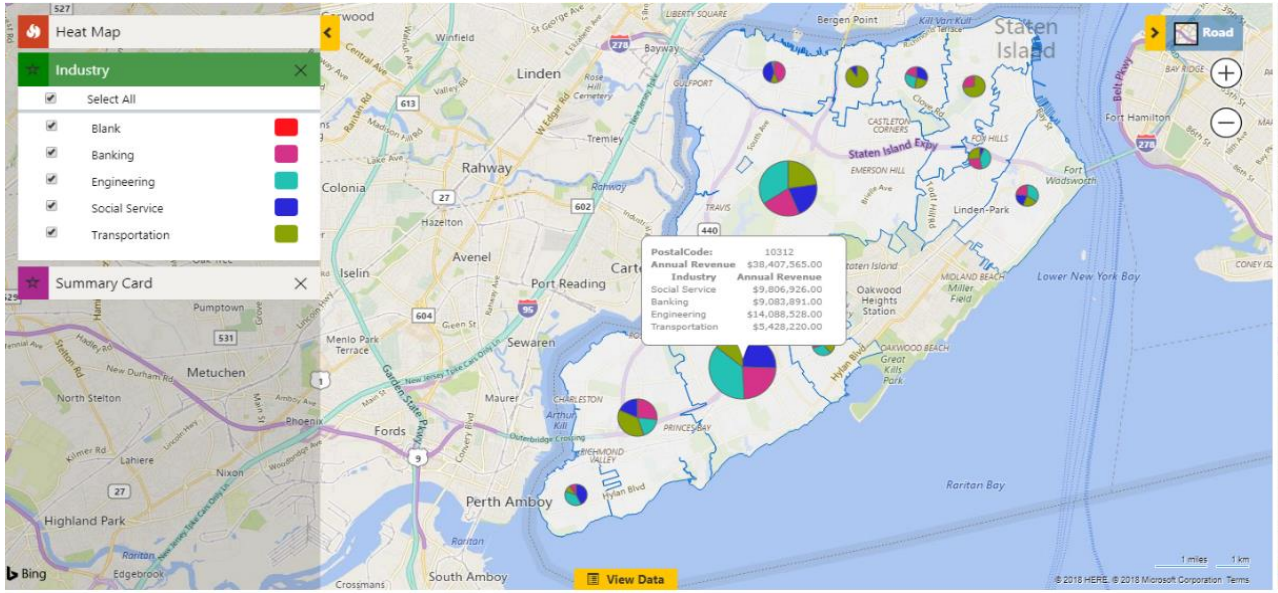
- **Create optimized routes for selected records**
- **Register activities for each of the waypoints**
- **Preview activities with start and end time**

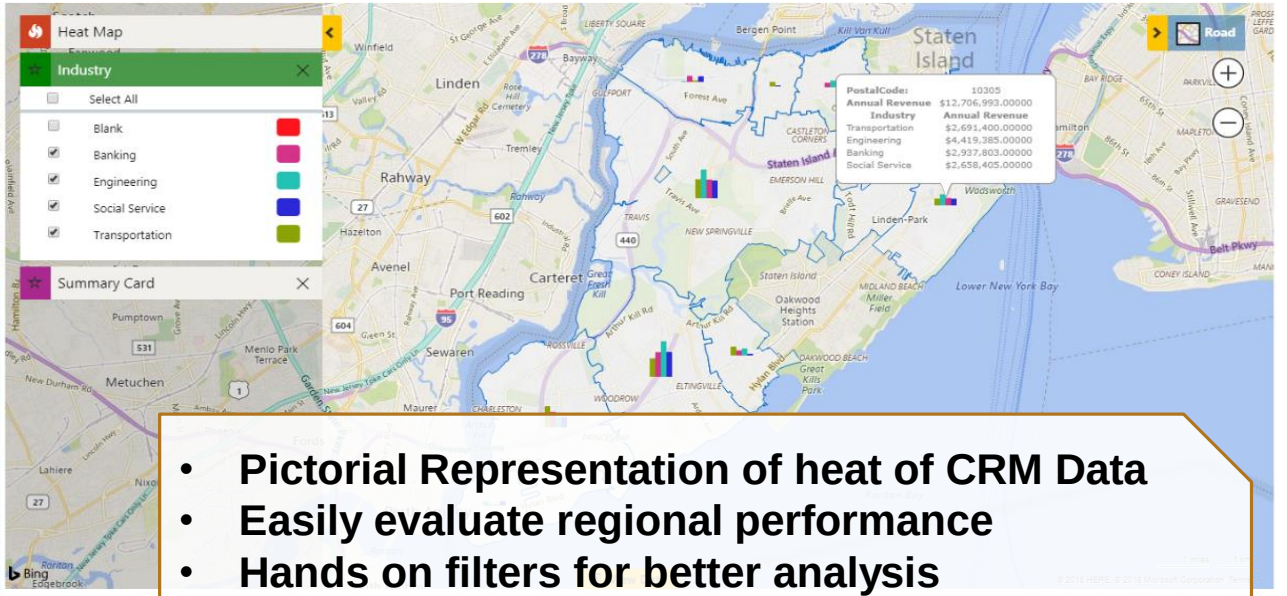
ANALYTICAL DASHBOARD

- Easy way to visualize & analyze categorized data
- Easily create & configure dashboard views

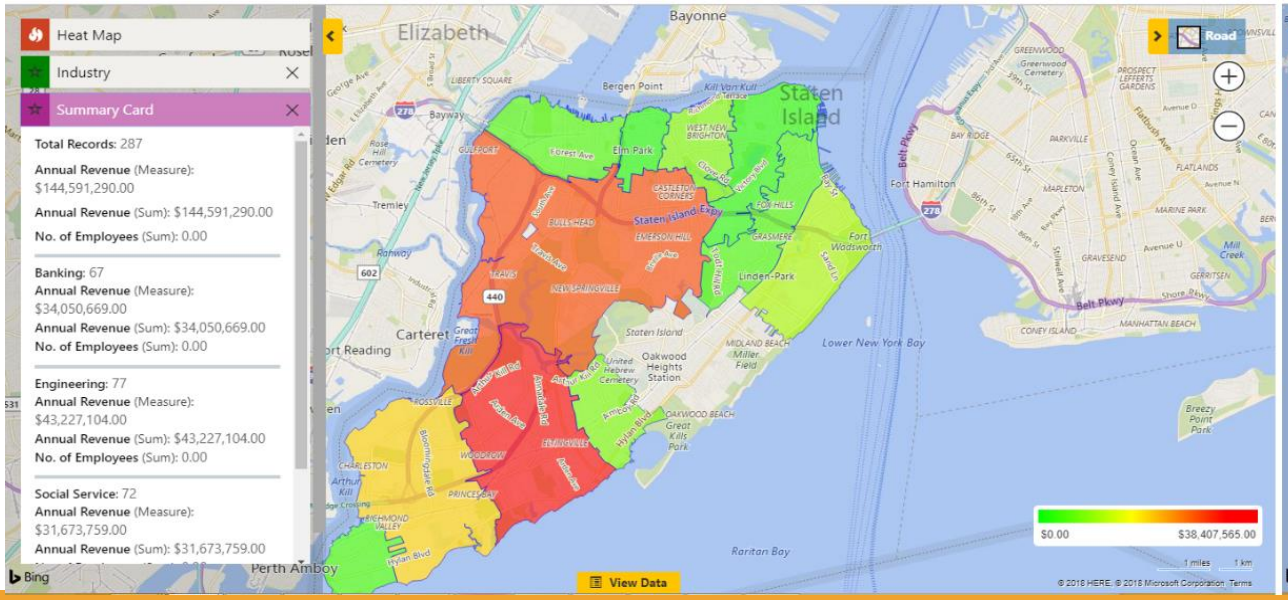


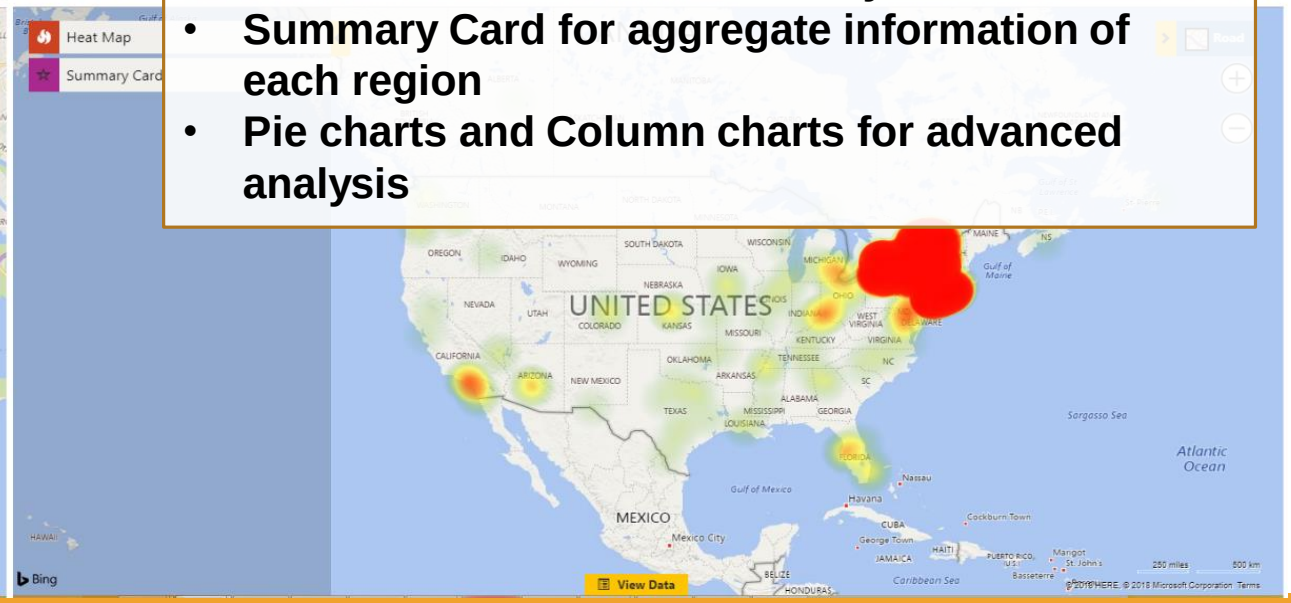
HEAT MAPS





- Pictorial Representation of heat of CRM Data
- Easily evaluate regional performance
- Hands on filters for better analysis
- Summary Card for aggregate information of each region
- Pie charts and Column charts for advanced analysis



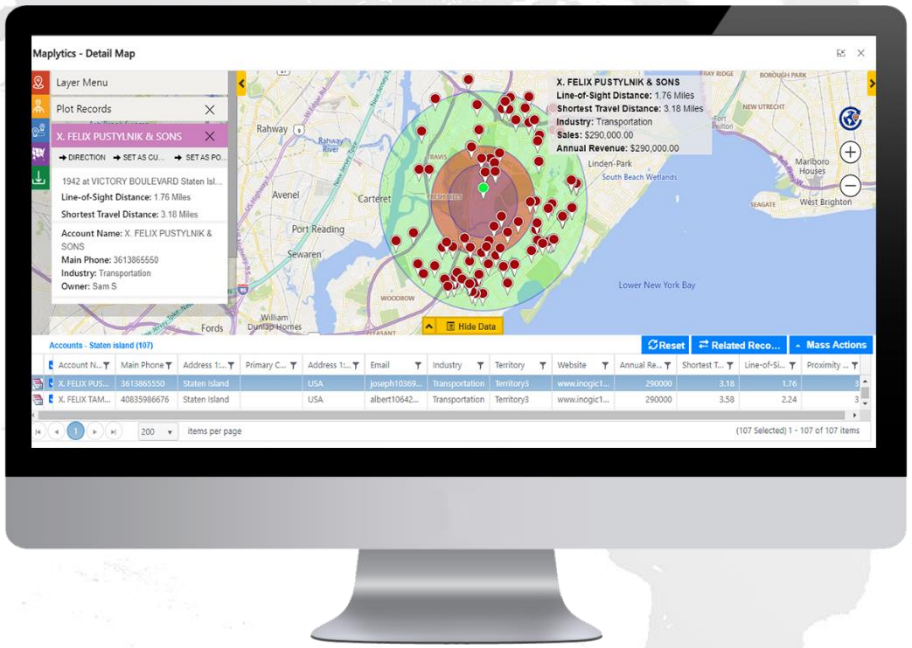


Common Use Cases

- Build or realign Sales Territories on basis of count of records for my field professionals
- Reducing travelling expenses through optimized automated schedules
- Track my technicians/sales reps in real-time
- One of my clients has cancelled his meeting, search for near-by clients or POI locations
- View geographic insights of data on CRM page with PCF controls
- Ideal location for my next marketing event ?
- Which region is performing well in terms of sales ?
- Analyse shape/excel files along with the records on the same map as an Overlay
- Provide selective access of geo-mapping to your users
- View my lost leads in last 6 months in analytical dashboards
- Where and how big are the lands owned by my clients
- What is the demographics of the population for a particular region ?

Device Compatibility

Desktop



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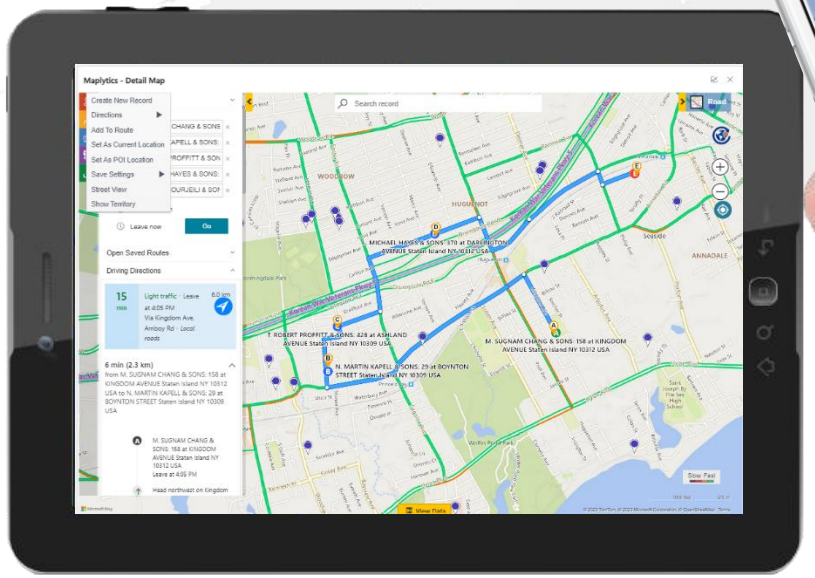

Mobile

THANK YOU

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