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Maplytics™ White Paper

maplytics.

Aim

Maplytics is a Geo-Mapping tool aimed to help visualize Dynamics 365 data on a map for analysis.

Target Audience

Managers - Analyze sales and customer data through heat maps by means of Dashboards. Manage territories and create auto schedules.

Field Staff – Follow schedules assigned with navigation and search for nearby clients or POI locations and plan new appointments quickly.

Marketing Team - Target customers based on their proximity to a particular location and the demographics of the population.

Available for

Versions: Dynamics CRM 2013 & above, Dynamics 365 CRM
Deployment Models: On-Premise, Online, and Partner Hosted.
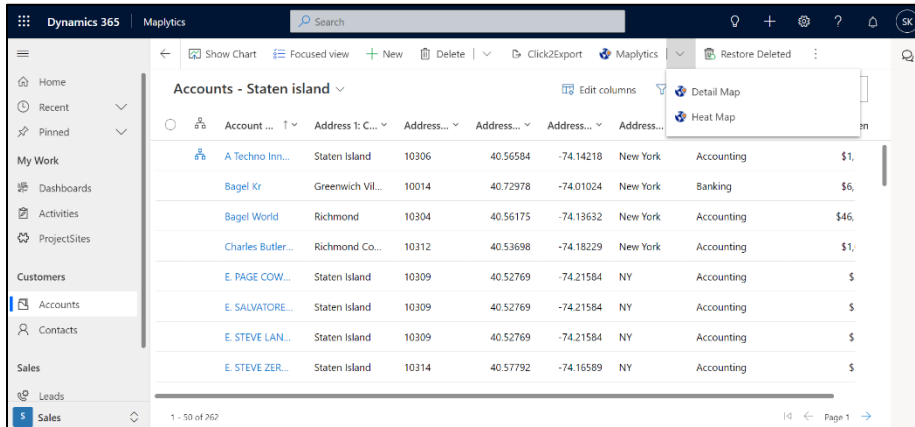Languages: English, Spanish, German, French, Portuguese, Turkish & Arabic

Features

- ✓ Ease of access
- ✓ Compatible with Dynamics 365 App for Phones and Tablets
- ✓ Multiple language support
- ✓ Plot multiple OOB & custom entities on map
- ✓ Area of Service
- ✓ Search nearby records with Proximity Search
- ✓ Auto Scheduling for multiple users
- ✓ Track field rep's activities with Check-In
- ✓ Custom icons for pushpins
- ✓ Real-Time Tracking
- ✓ Multiple categorizations for single or multiple entities

- ✓ PowerApps Component Framework
- ✓ Multiple territories for a record
- ✓ Land Area Mapping
- ✓ Multi-search layer in Detail Map Control
- ✓ Building a Marketing list
- ✓ Pie Charts and Column Charts in Heat Map
- ✓ Territory Hierarchy
- ✓ Overlay
- ✓ Maplytics Security Template
- ✓ Territory Assignment Rules
- ✓ Point of Interest search
- ✓ CRM / Dynamics 365 Customer Engagement
- ✓ Bulk geographies uploaded in Territory
- ✓ Shape operations
- ✓ Territory Management
- ✓ Auto-Territory Creation
- ✓ Draft Territories
- ✓ Census data visualization
- ✓ Support for CDS
- ✓ Plot Saved Templates on individual records
- ✓ Configurable categorized color-coded pushpins
- ✓ Routing with multiple waypoints
- ✓ Along the Route search
- ✓ Ability to Save & Share Driving directions
- ✓ Sales analysis with Heat Maps
- ✓ Summary Card on Detail and Heat Map
- ✓ Configurable color for Heat Map measure
- ✓ Maplytics Dashboards with configurable queries
- ✓ Geocoding Confidence Rating
- ✓ Route Redirect for turn-by-turn navigation on mobiles & tablets
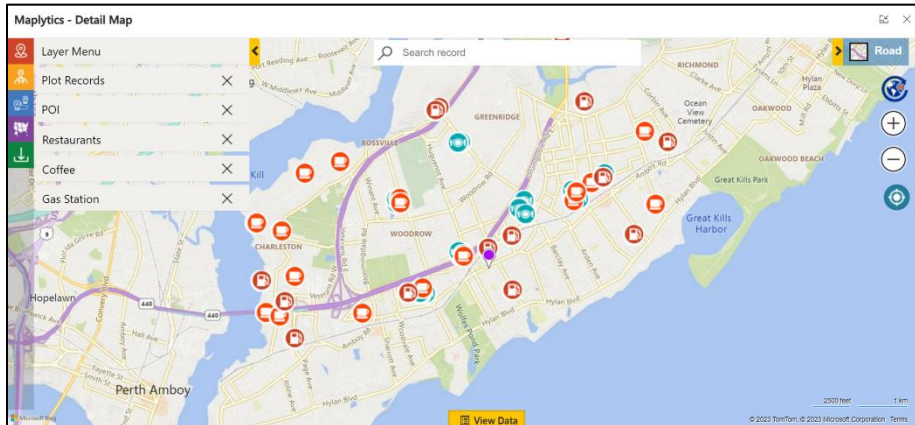- ✓ Seamlessly integrated within Dynamics

Ease of Access

A map button has been added to the ribbon of all entities.

Multi Address Plotting

Multi Address plotting allows users to plot the records having multiple addresses at once on a map.
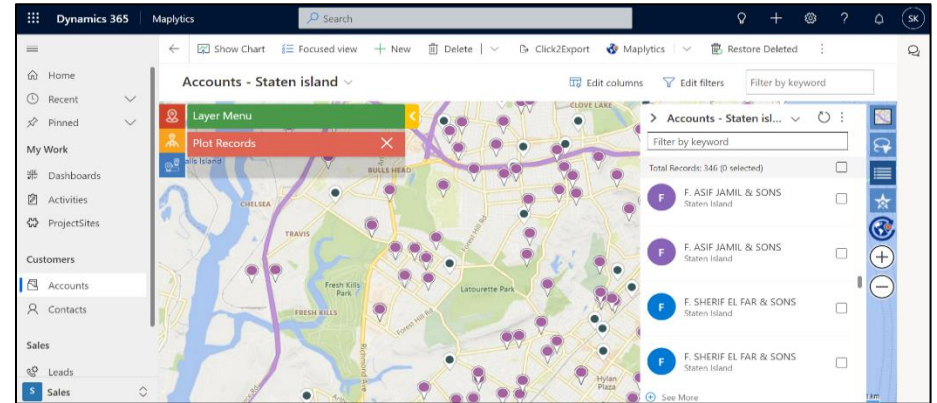

Plotting Multiple Records across Multiple Entities

Plot multiple records of desired entities specifying current location and proximity. Also, plot-related records for drill-down analysis or plot nearby POI like restaurants, airports, etc.
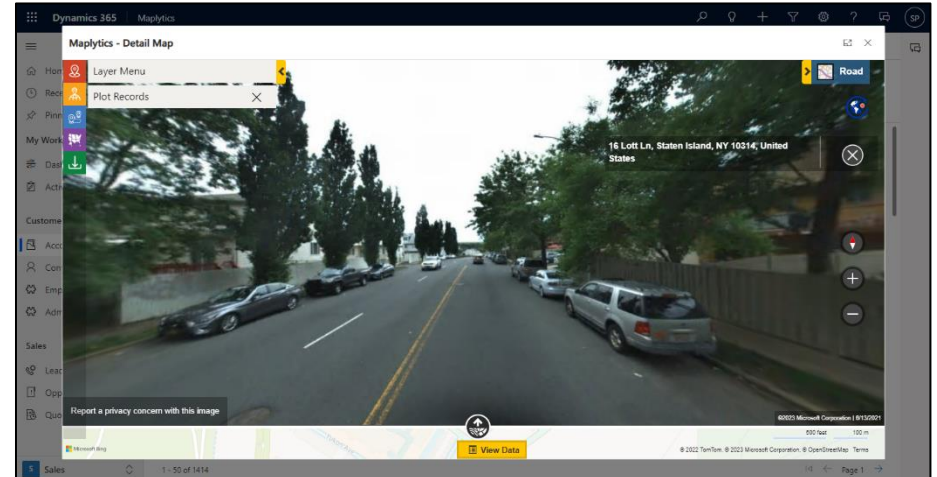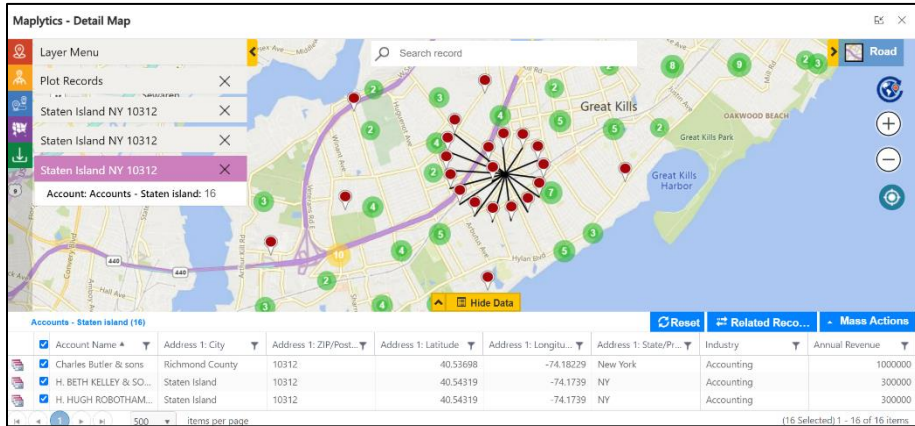

Street View

Right-clicking on the Detail Map gives an option of Street View. Clicking it opens an improved 3D view of the street.

Spider cluster

Users can click on any cluster to view the pushpins existing in the same in the form of a 'Spider cluster'.

Territory Management

Users can plot shape files, excel files, or regions and create territories.
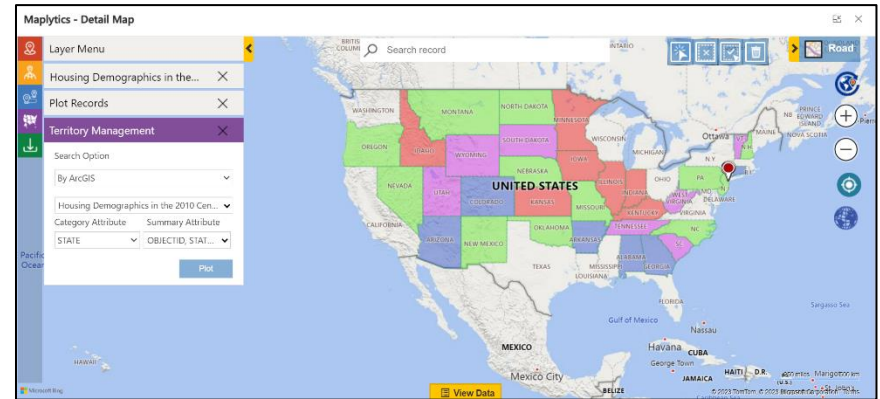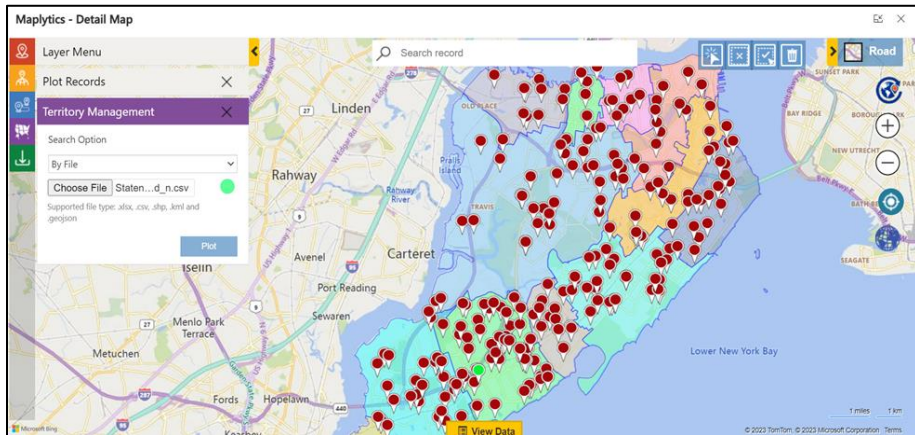
Territory alignment tool

This helps the user to select regions or territories to create new territories or align new territories. Users can further align existing territories.
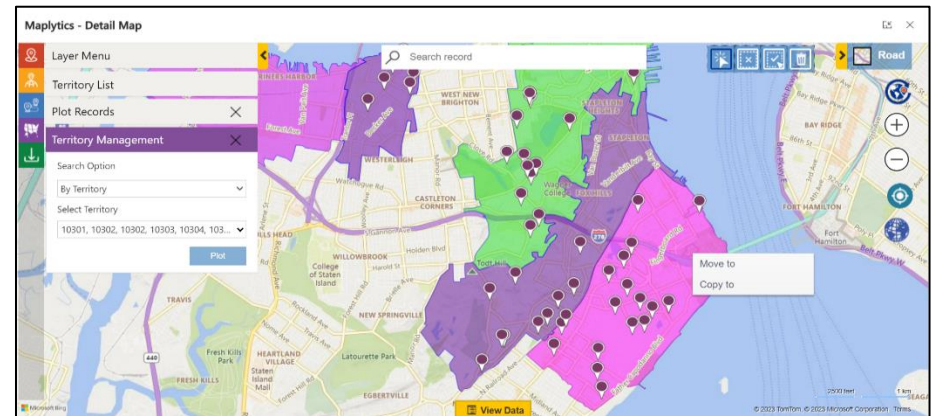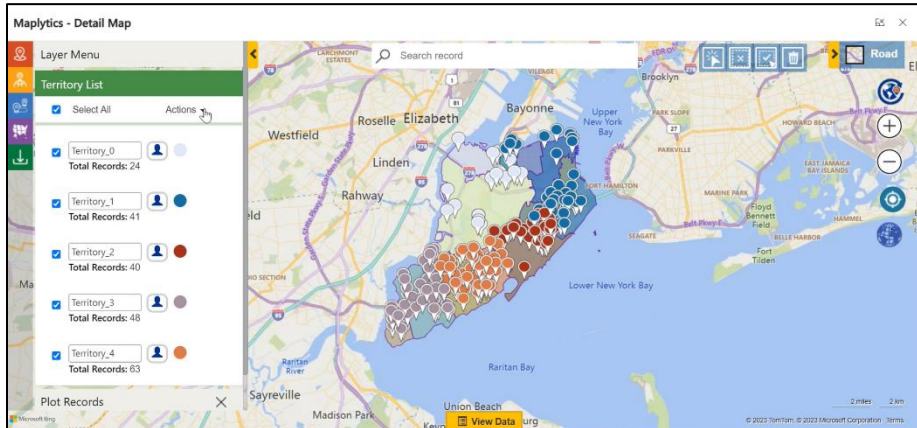
Draft Territories

Users can use Auto-territory to process territories automatically and save them as drafts to rework on the same.

Territory Assignment Rules

This helps to create rules for assigning territories or owners to the CRM records as per required conditions.

## Auto Territory Creation

Users can plot their records & file and enter the number of territories they want. This creates a specified number of balanced territories automatically.
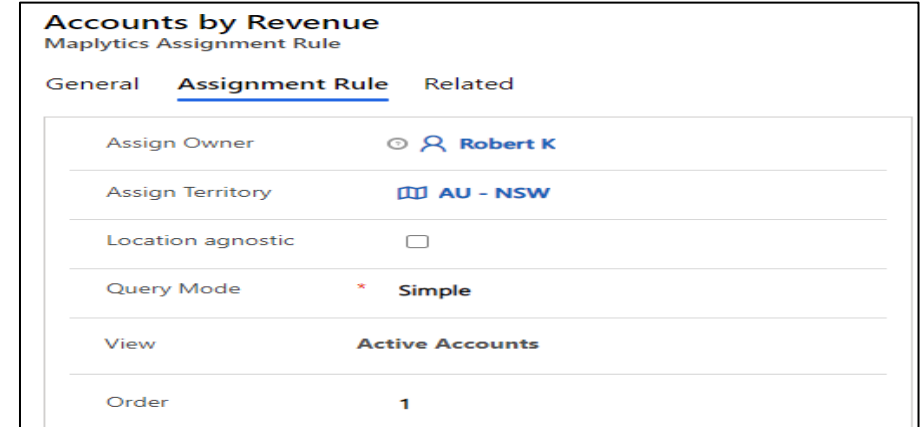
Hierarchical Territory

If an organization has enabled Hierarchical territories in the CRM, the users can plot the territories to plot and manage multi-level territories on map.
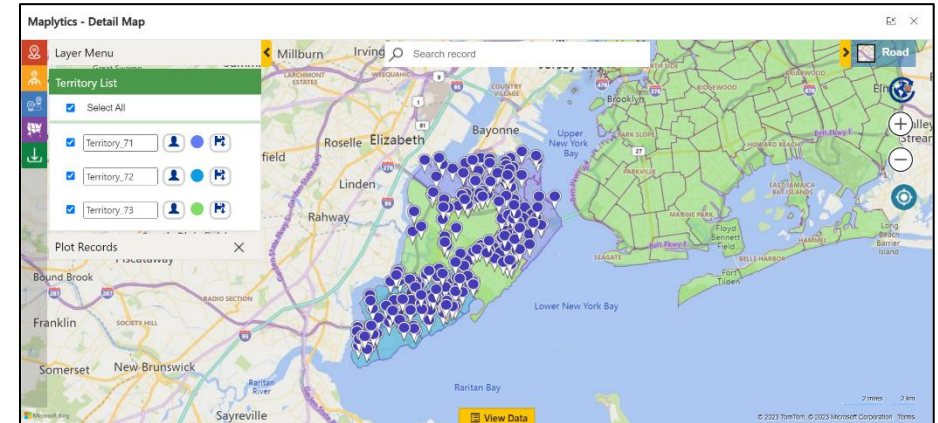
Area of Service

The user can view the data in proximity or a region around an individual record as defined by the user in the Area of Service.
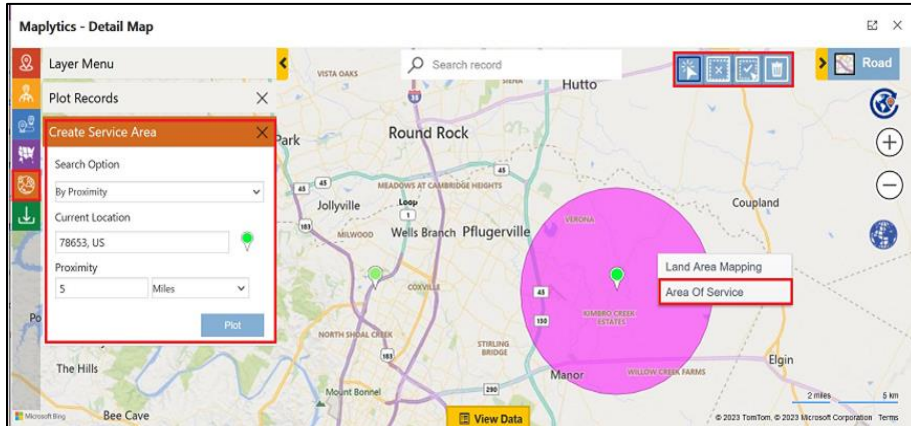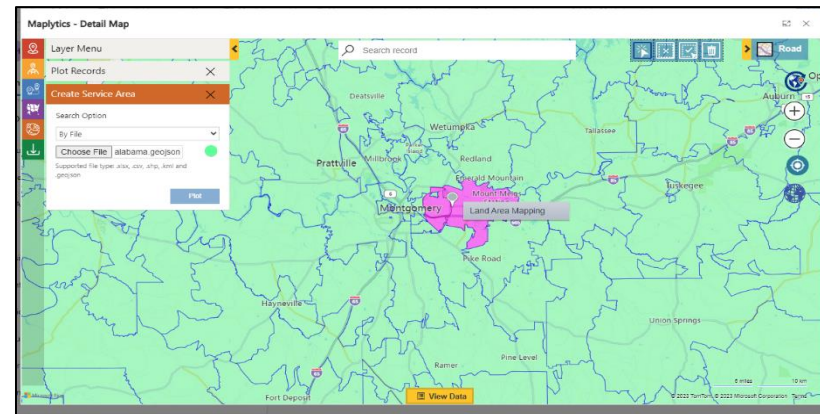

Overlay

This helps the user view the Dynamics CRM records along with files and existing territories plotted on the map.
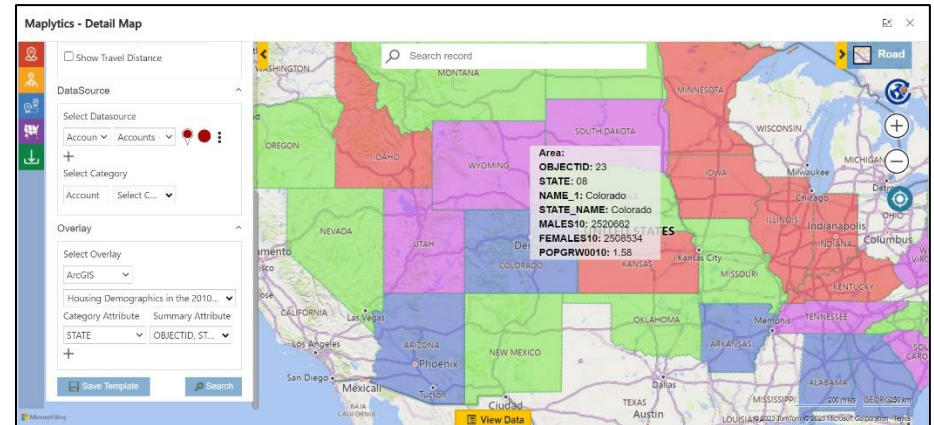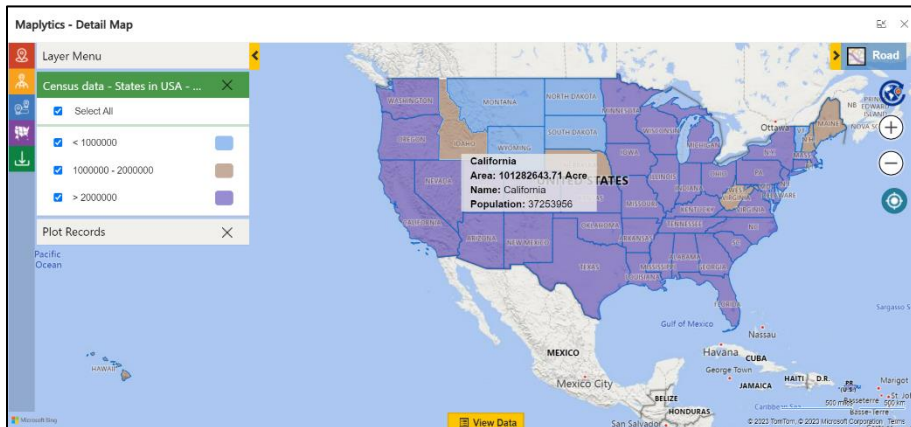

Land Area Mapping

Users can assign land regions to records and visualize them on the map to understand the coverage of the area for each of the records.
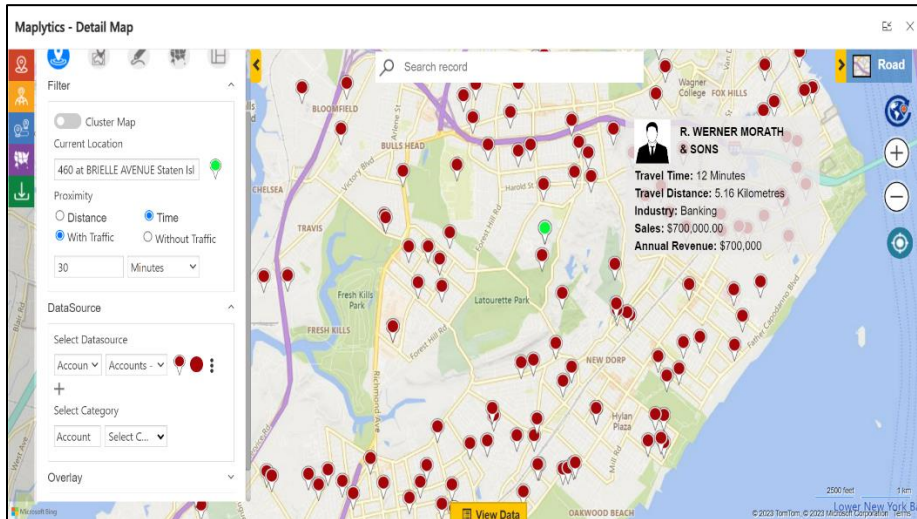
Proximity Search

Find nearby records within the defined proximity from the current location by either distance or time.

By Distance: This will calculate the straight-line distance between the current location and all the points, which fall in the proximity parameter.
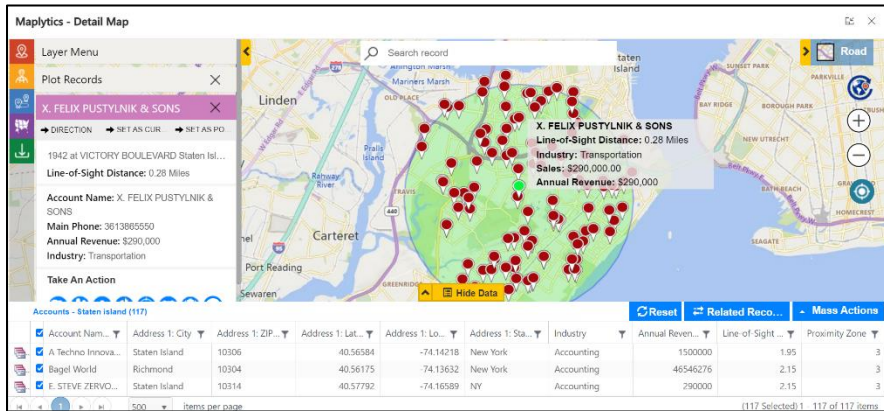
By Time: This will calculate how many points fall in 'x' minutes or hours of driving distance from current location.
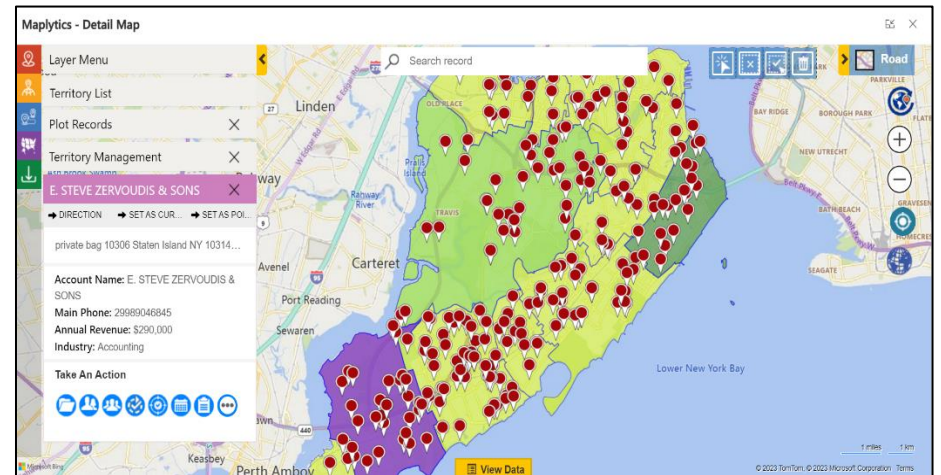

Concentric Proximity Search

The users can perform up to 3 proximity searches simultaneously using Concentric Proximity Search.
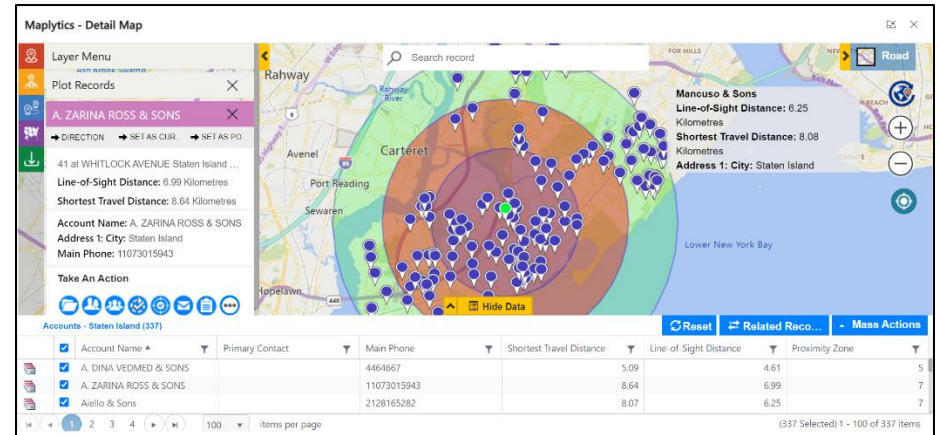
Summary Card

The user can click on any enclosed area on the Detail Map and Heat Map to get the summarized information of the records that lie in that area.

Shape Operations

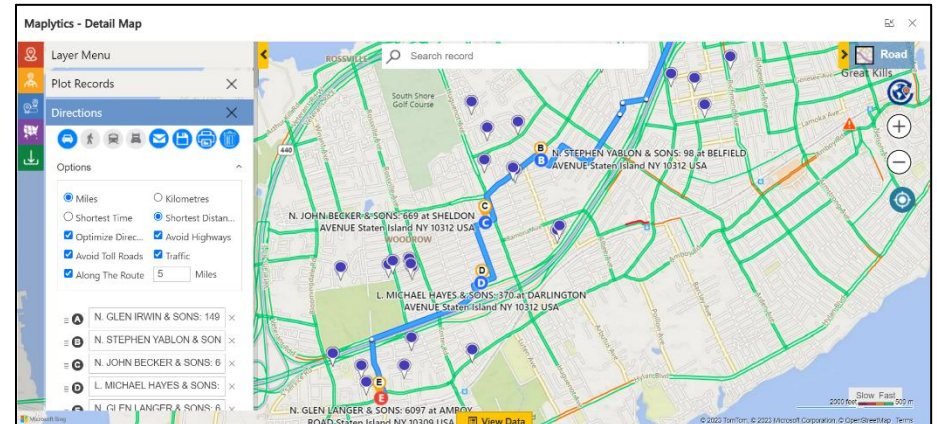Users can perform Binary operations on the shapes drawn on the map.

Along the Route Search

Search the records that fall in the defined proximity along the route.
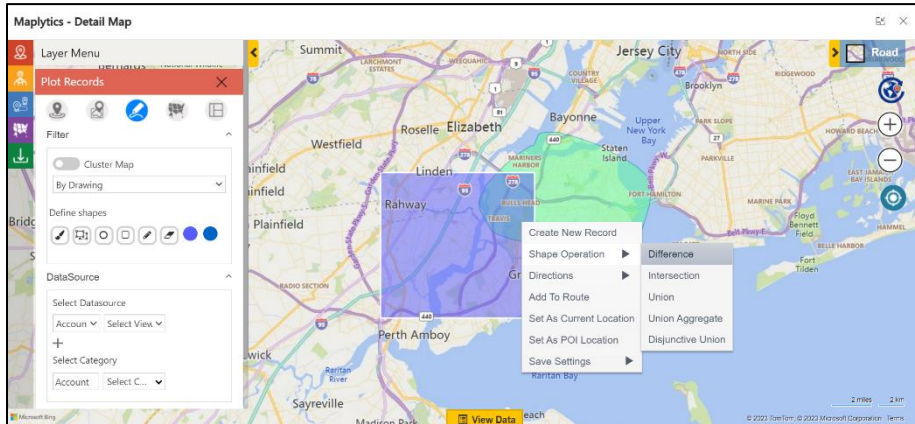
Color-coding of Pushpins

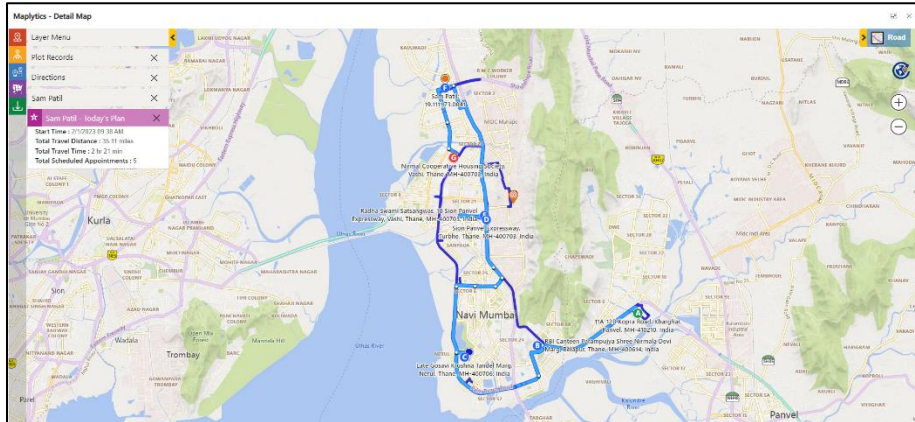Color-coding and shape of pushpin based on categorizations.

Merged Route and Plot View

Users can now create routes and have the plotted data on the same map screen as well. This makes it easy for the user to add more waypoints to the route without switching between Plot and Directions card.
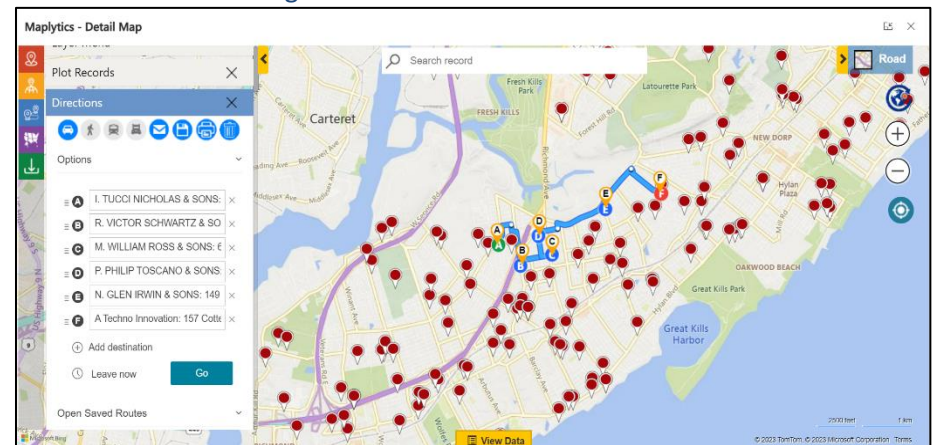
Proposed and Actual Route Tracking

The user can track and view the actual route followed by the rep and the proposed route plotted for them

Truck Route

Users can search for the Shortest Travel Distance to required records based on driving by a truck as well as create an optimized route for trucks.
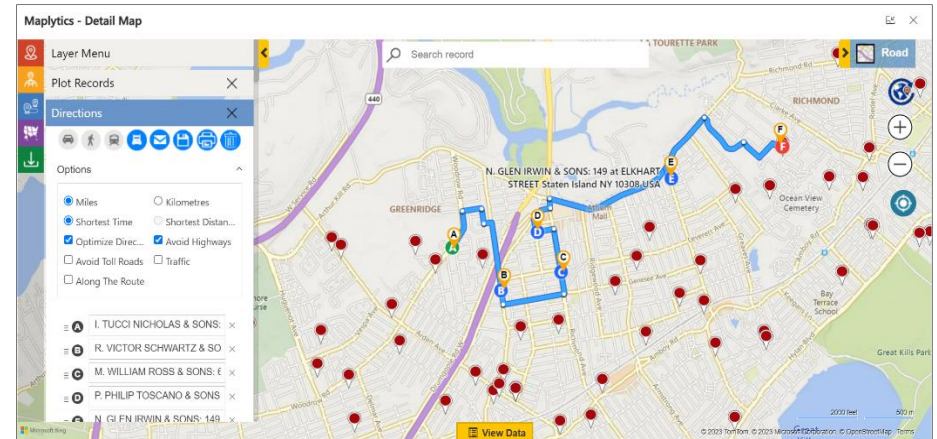

Route Redirect and Copy Navigation Links

The user can click on individual links for turn-by-turn navigations from points A – B, B – C, and so on. The links redirect to the Google Maps, Waze site, or Apple Maps on desktop and Google Maps/Waze App/ Apple Maps on Phones and Tablets.

Auto Scheduling

Create a schedule for one or more users automatically with consideration of specified preferences. Users can follow this schedule over a span of days.
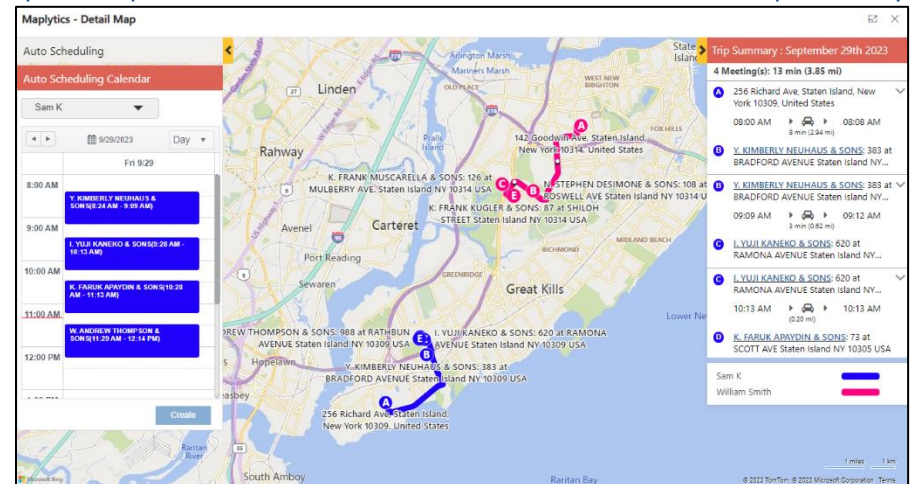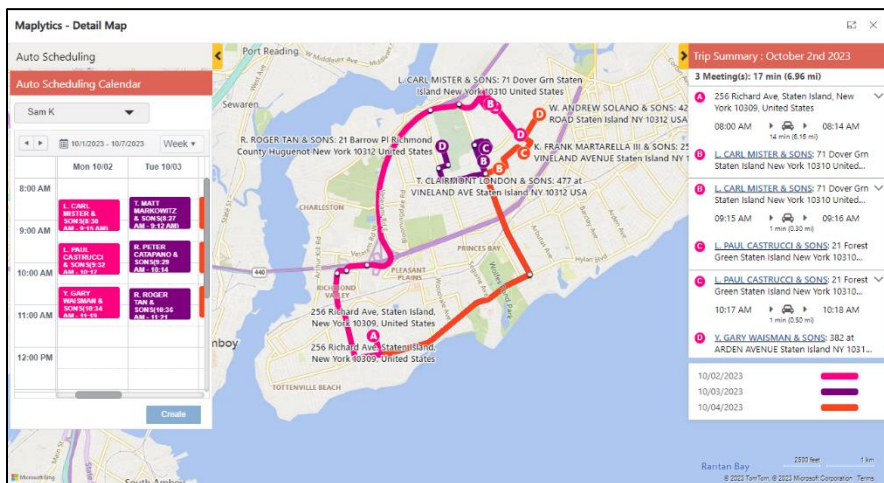
Advanced Preferences in Auto Scheduling

Users can set basic and advanced preferences like considering existing meetings, different meeting durations, etc. to be considered in the schedule.

Frequency Detail Feature in Auto Scheduling

Users can schedule appointments as per client availability and repeat them after a specific interval as required
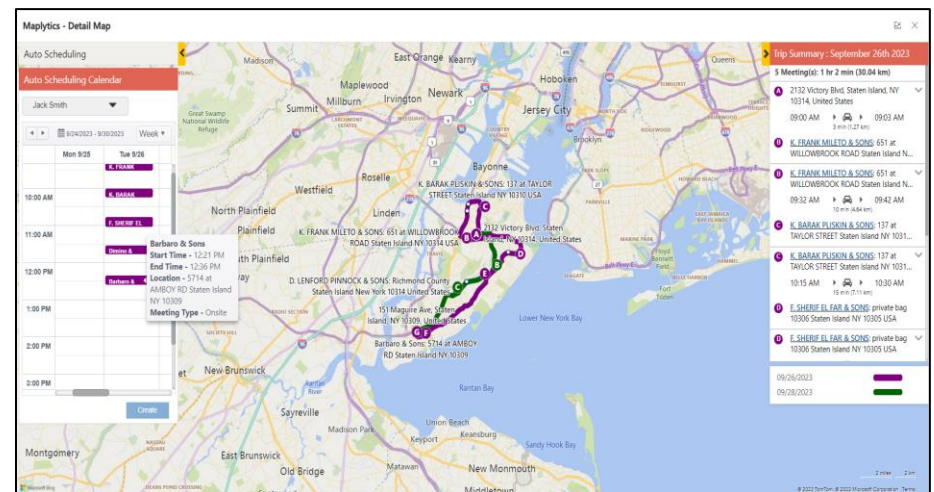
Real-Time Tracking

With Real-Time Tracking, Resources/Reps can be tracked on the field in real-time.

Today's Plan

The 'Today's Plan' button will allow the user to view the route assigned to a Sales Rep/Resource to be followed as well as the route that is being traveled by the Rep/Resource he real-time. It also shows the appointments/bookings assigned to them for today.
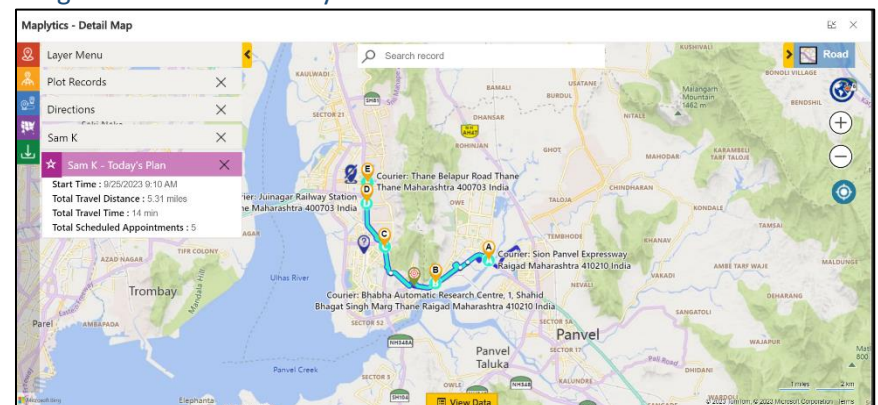
Location History

'Location History' allows the users to view the past traveled routes of the Rep/Resource. It also shows the appointments/bookings assigned to them for the respective selected date.
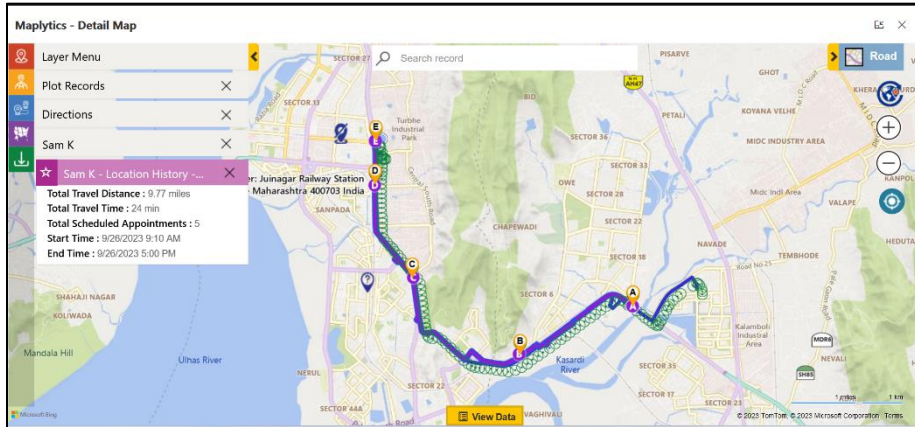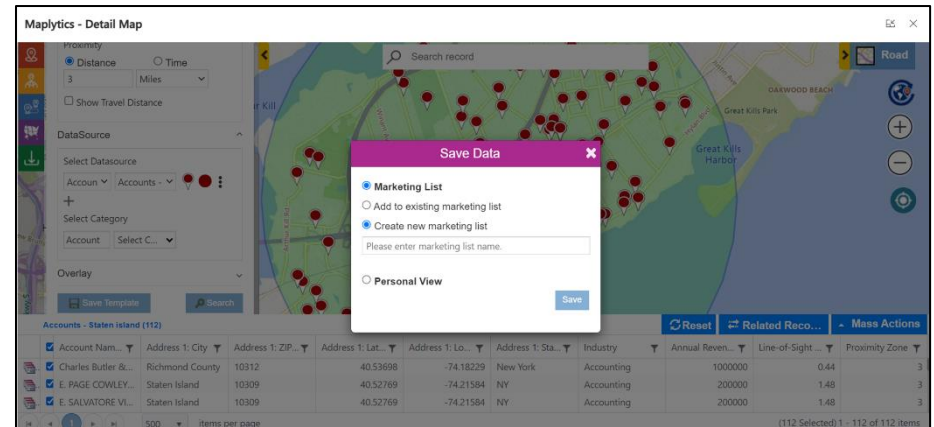

Point of Interest (POI) Search

Ability to search for any points of interest (POI) like ATMs, restaurants, hotels, etc. in the vicinity. This will be plotted alongside the CRM data. Users can enter a keyword to search for required POI locations.
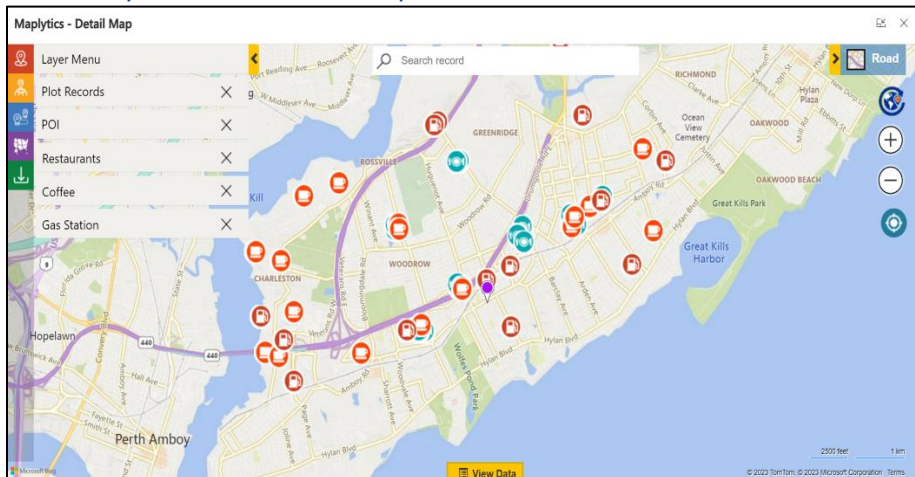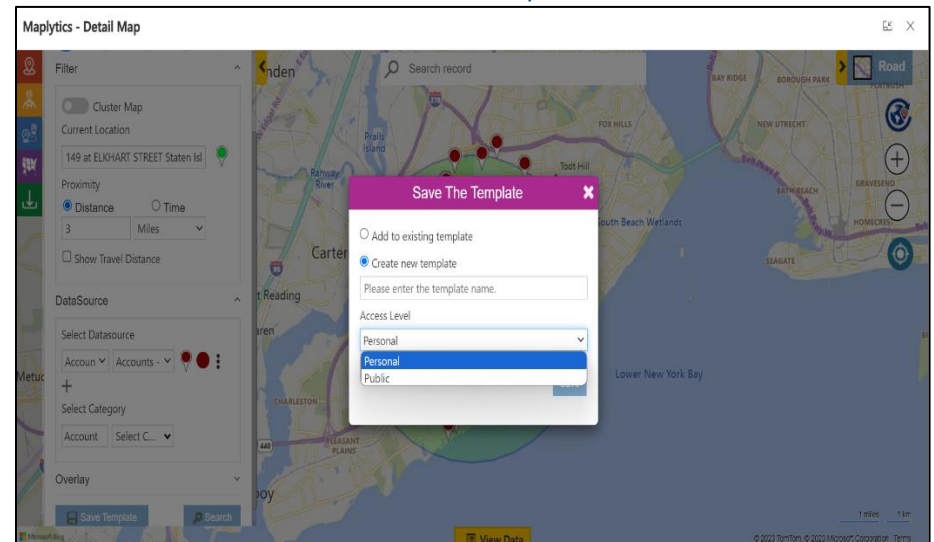

Listing of the Search Results

Ability to save the search results as a static personal view or marketing list.
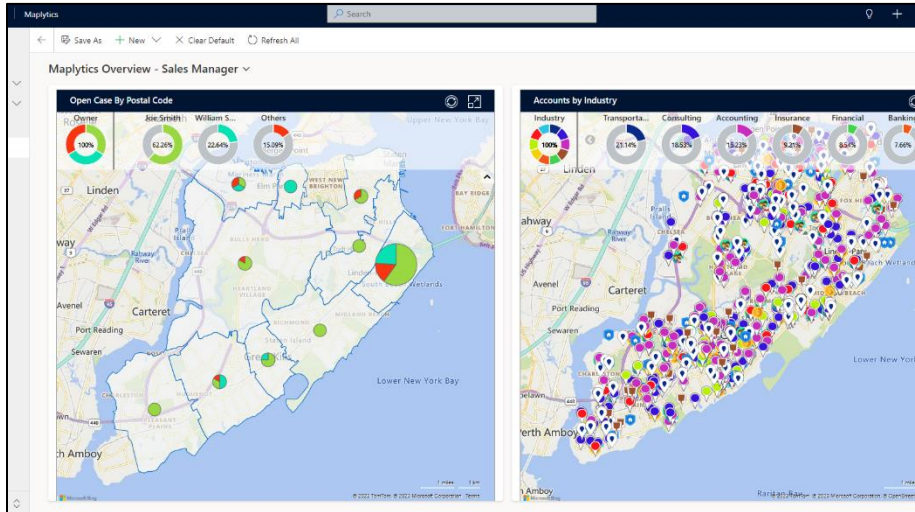

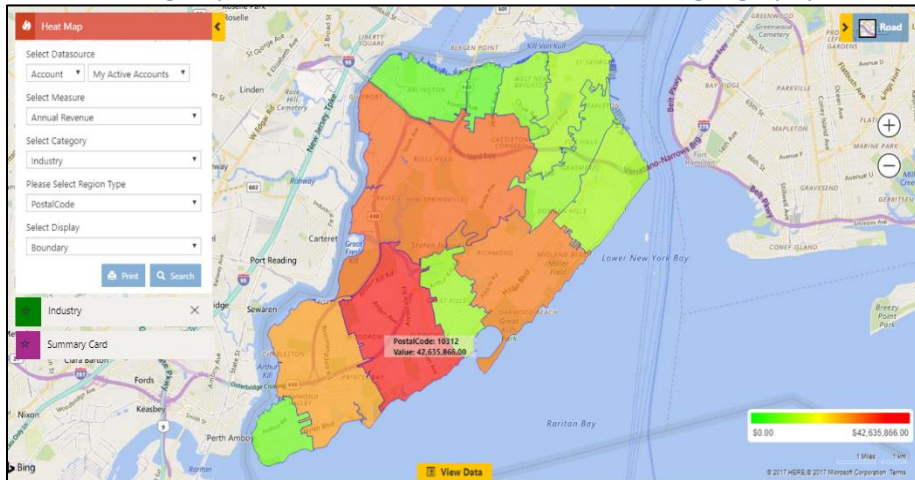Users can also save search criteria as a template.

Dashboard Support

Users can include the Maplytics component as a web resource in the CRM Dashboard.

Heat Map Visualizations

Visualize your customer and sales data as Heat Maps to get a better understanding of your customer/sales distribution across geography.
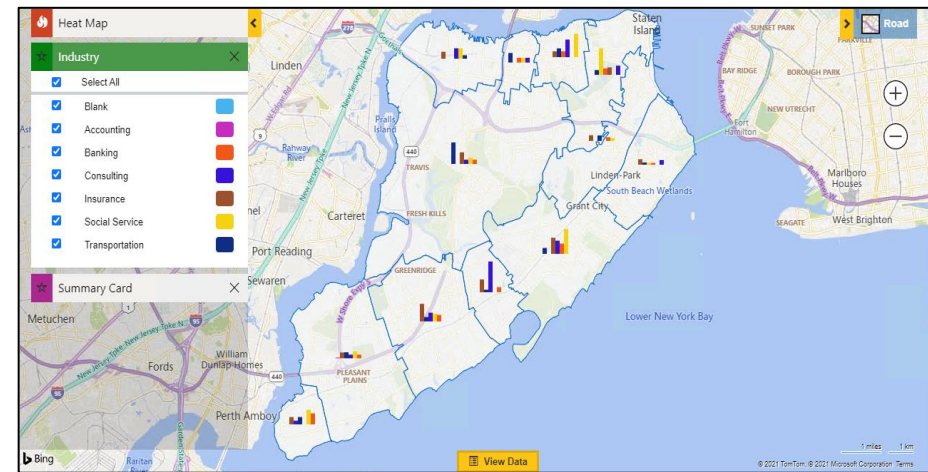

Pie Charts in Heat Map

Users can view the data in the form of Pie charts based on the heat of the attribute selected in the Measure and Filter.
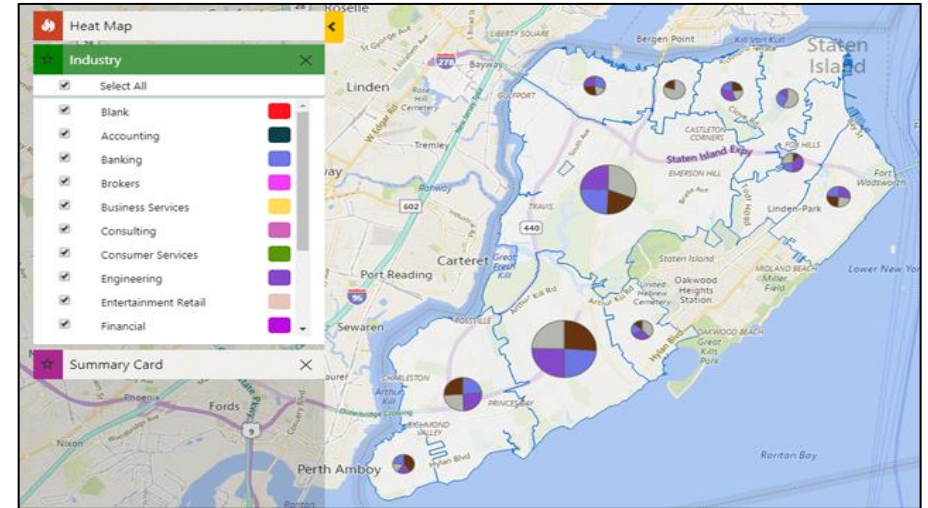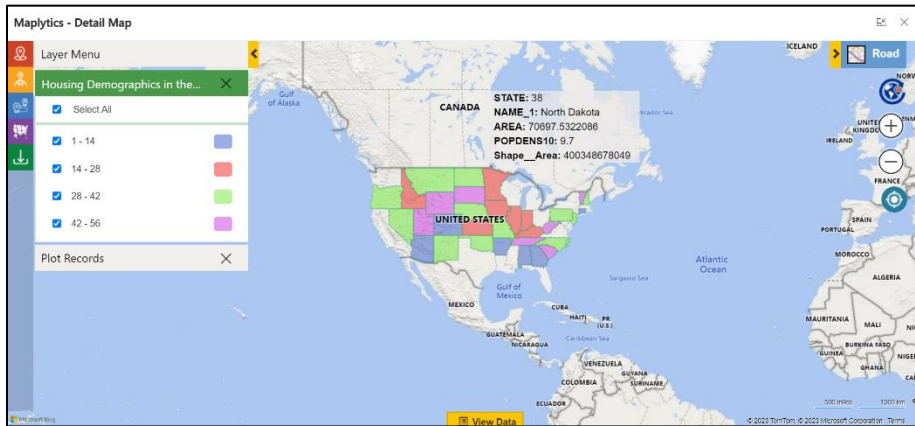

Column Charts in Heat Map

Visualize the data in the form of column charts plotted on the basis of the heat of the attribute selected in the Measure and Filter.
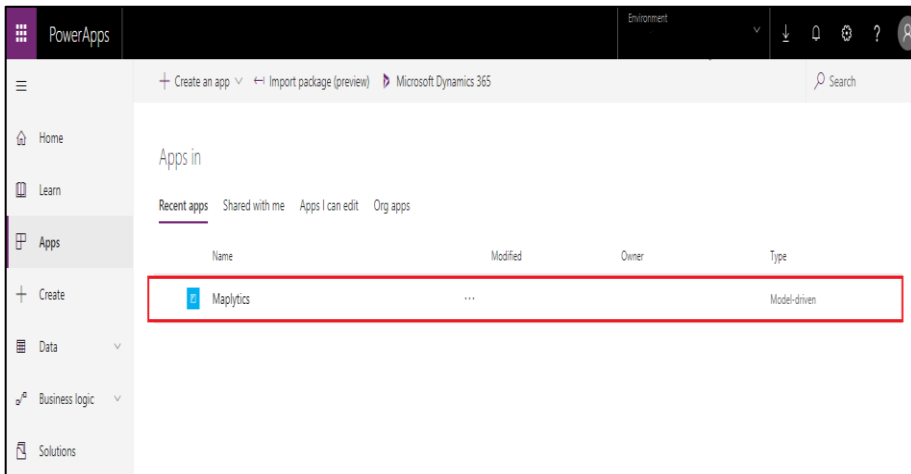
Census Data Visualization

Visualize census data on the map within your Dynamics CRM. We have provided a few census data for the USA by default.
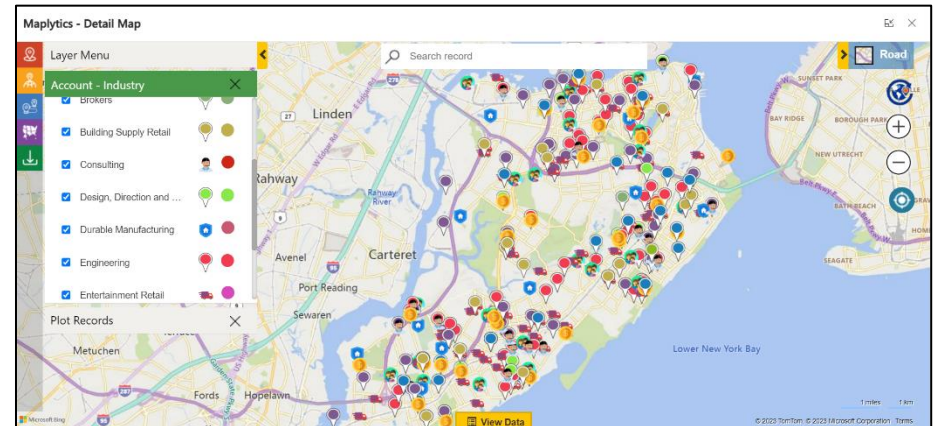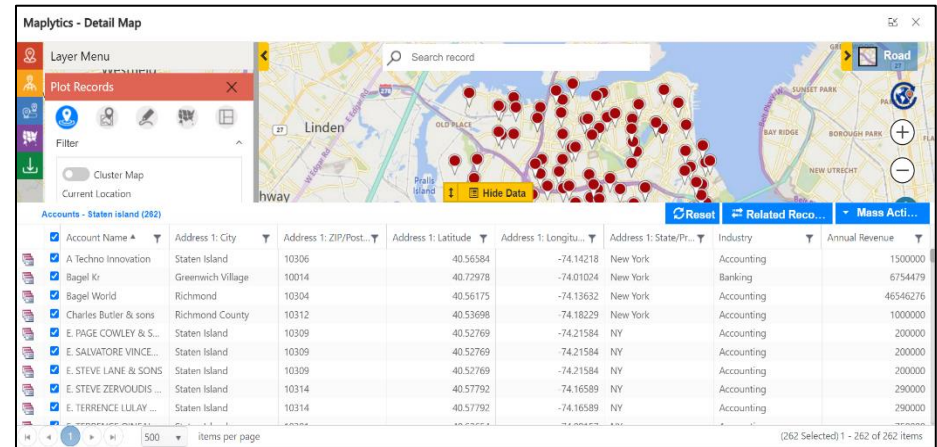

Bring your own icons

Users can use their personalized icons for pushpins. This makes the representation of pushpins even more relatable.

Support for CDS

Deploy Maplytics on PowerApps now. All the base Entities are supported.

Resizable view data grid

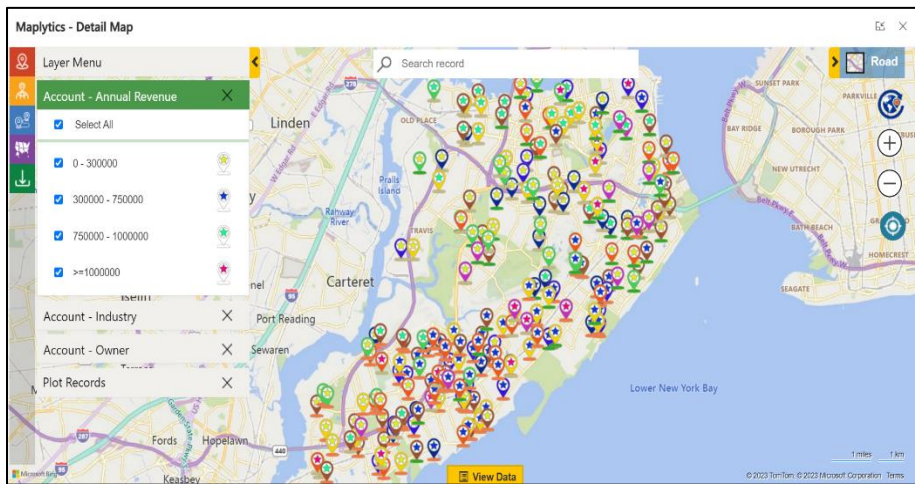The data grid can be dragged and expanded as well as collapsed for better viewing by users.

Multiple categories for multiple entities

More than one category is supported. Users can choose one category each for three individual Entities.


Check-In

The Check-In feature enables users Check-in & Check-out out to register their arrival and departure times for the meeting locations while navigating on the field.

Multiple categories for a single entity

Single entity records can be categorized based on a maximum of three different attributes.
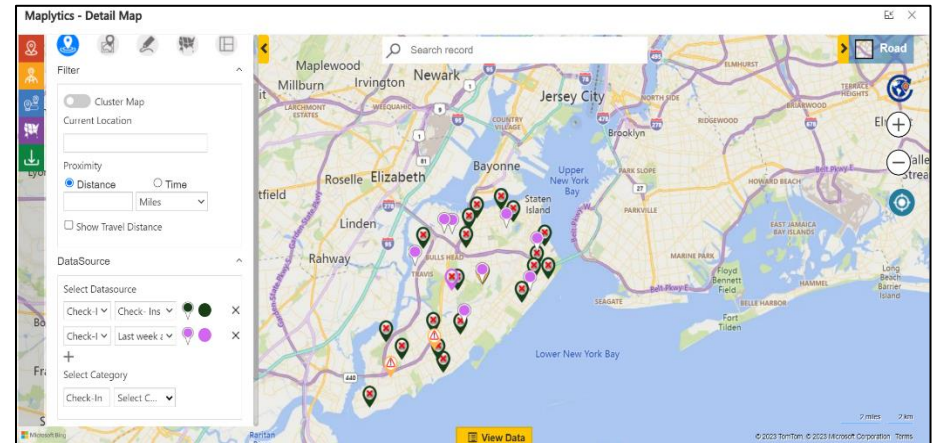
Multiple Territory

Multiple territories can be assigned to a single record.
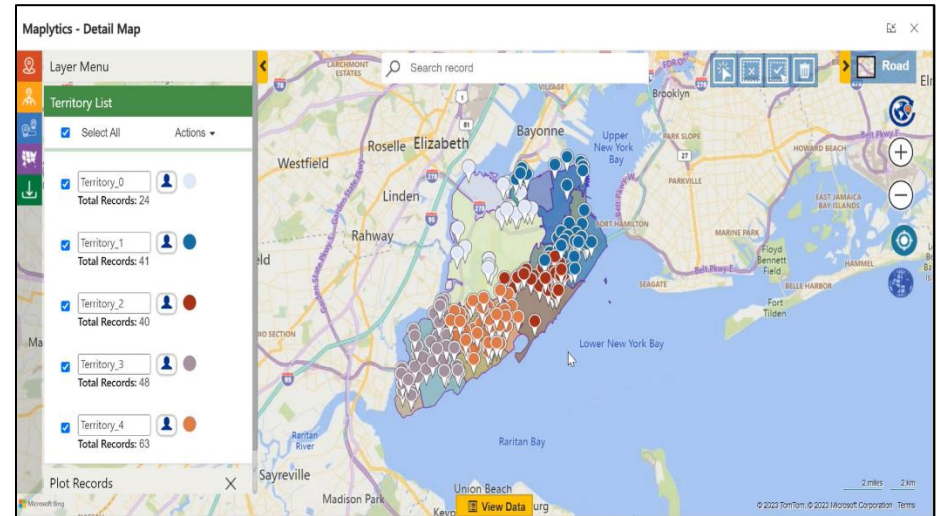
PowerApps Component Framework

Users can add custom controls on fields or grids, this helps the user to view the respective records on the map on the record form or the entity grid.
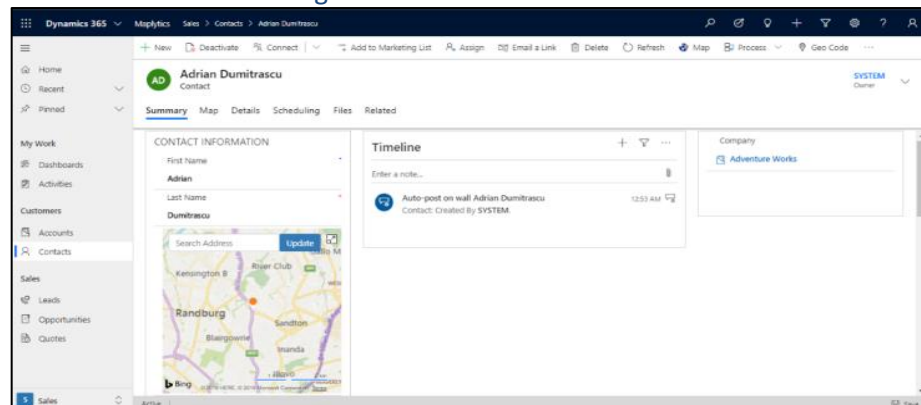
Map View Control for Record

Users can view the respective record plotted on the map within the form. Users can also view the Address and geo-coordinates on the hover of the pushpin.
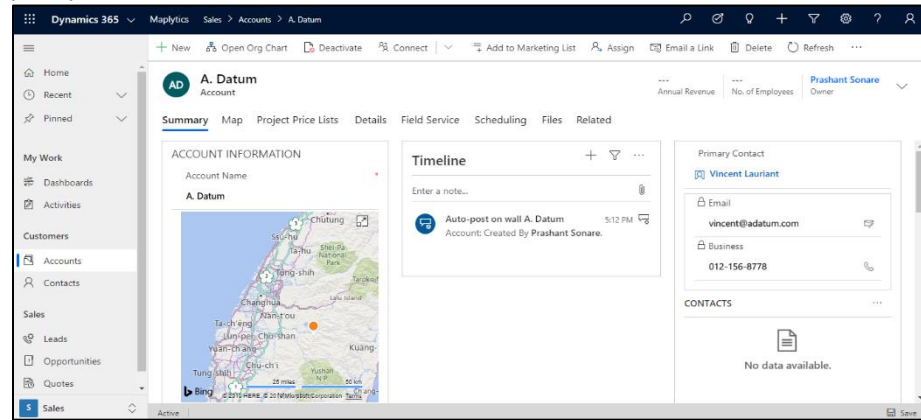

Map Edit Control for Record

Users can view the respective record plotted on the map within the form. Users can further drag the pushpin around and drop it on location to update the new Address and the geo-coordinates for the record.


Map View Control for Dataset

Users can visualize all of the records of the view or sub-grid on a map. Users can further hover on the pushpins to view the information regarding the records.
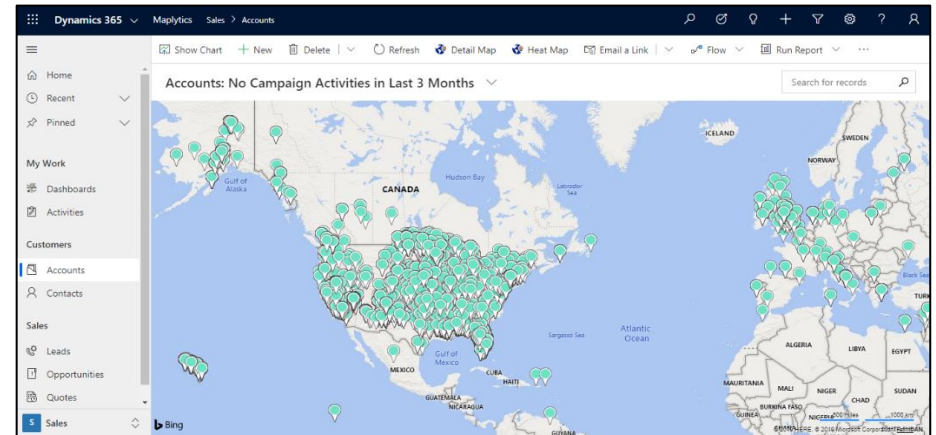

Detail Map Control

Users can add this control to any entity or dashboard to visualize all of the records on a map. Users can also perform Maplytics features like Proximity, Routing, Plotting by region, drawing, etc., using the plot card.
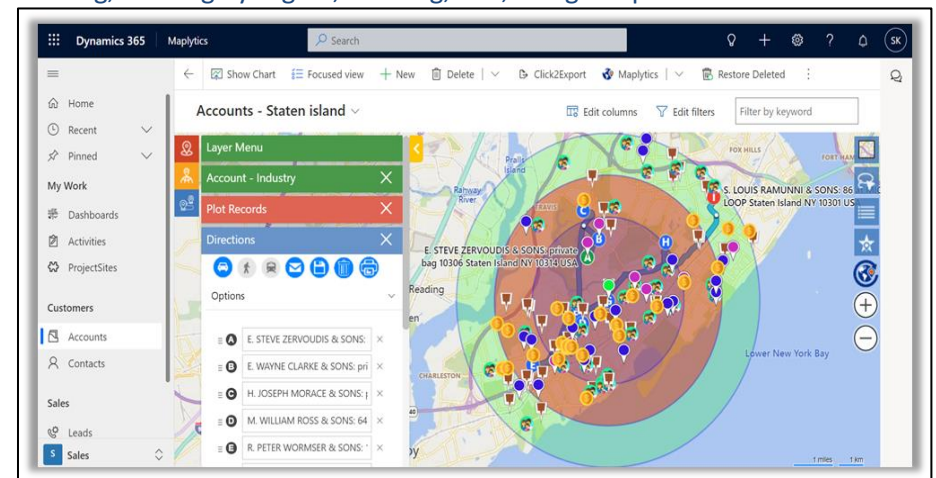
Multi-Search Layer in Detail Map Control

Users can perform more than one search at a time to plot multiple data on the map at once as multiple search layers.
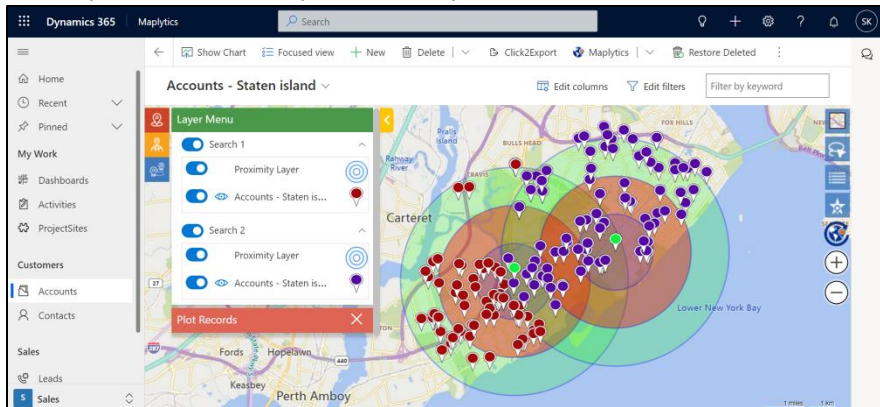
Address Autosuggest Control

Users can add this control to any of the fields to get suggestions for addresses. The address acquired by the 'Locate Me' button gets auto-populated.

Security Template

System admin and Maplytics admin can provide selective access to Maplytics actions to one or more Maplytics users.

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Online Help file: https://docs.maplytics.com/