Created by MyCRM Ltd

eMap

User Guide – Tracking Appointments

REF - eMap.Appointments.pdf

About This Guide

The purpose of this guide is to give a high-level overview of how to manage your CRM appointments via the eMap interface in Dynamics 365 / or when on premise Dynamics 2016.

Installation

Please refer to the separate eMap Installation and Configuration guide for instructions. This guide assumes that eMap has been installed with at least the default data, and that some entities in your CRM system have been geocoded.

Managing Appointments with eMap

Within the latest release of MyCRM eMap, we have now included the functionality to manage and view your CRM appointments by their location. This is a great value add, offering team members that work in the field who may need to plan a route. Yours or another user's appointments can be organised by location, with the appointments for today being displayed in green. Future appointments will be displayed in a different colour with the date of the future appointments displayed.

From a quick glance of the eMap screen, a field engineer or sales person can identify appointments in a given area, along with related customers or prospects that are within a given distance.
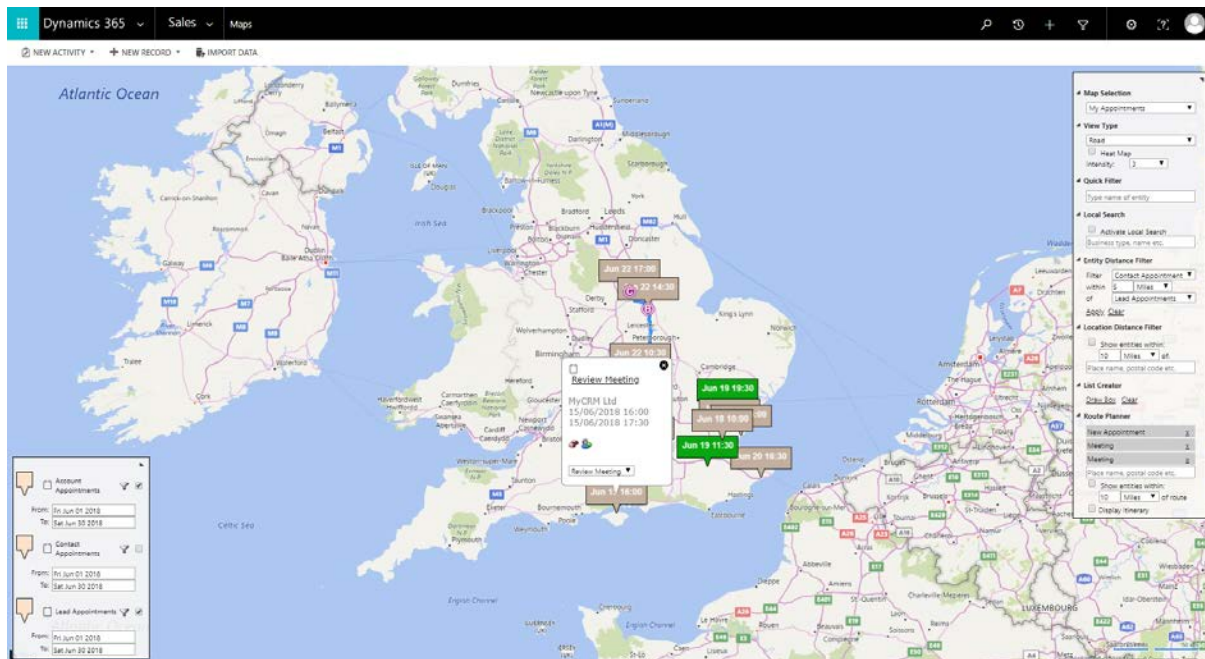

From the appointment record you can easily select the route tool and add your appointments to a route or use the select tool to get a list of appointments after drawing a box.

This means you can then run various actions from the list view including workflow; reassign records or pass to the advanced find solution to further query data in CRM.
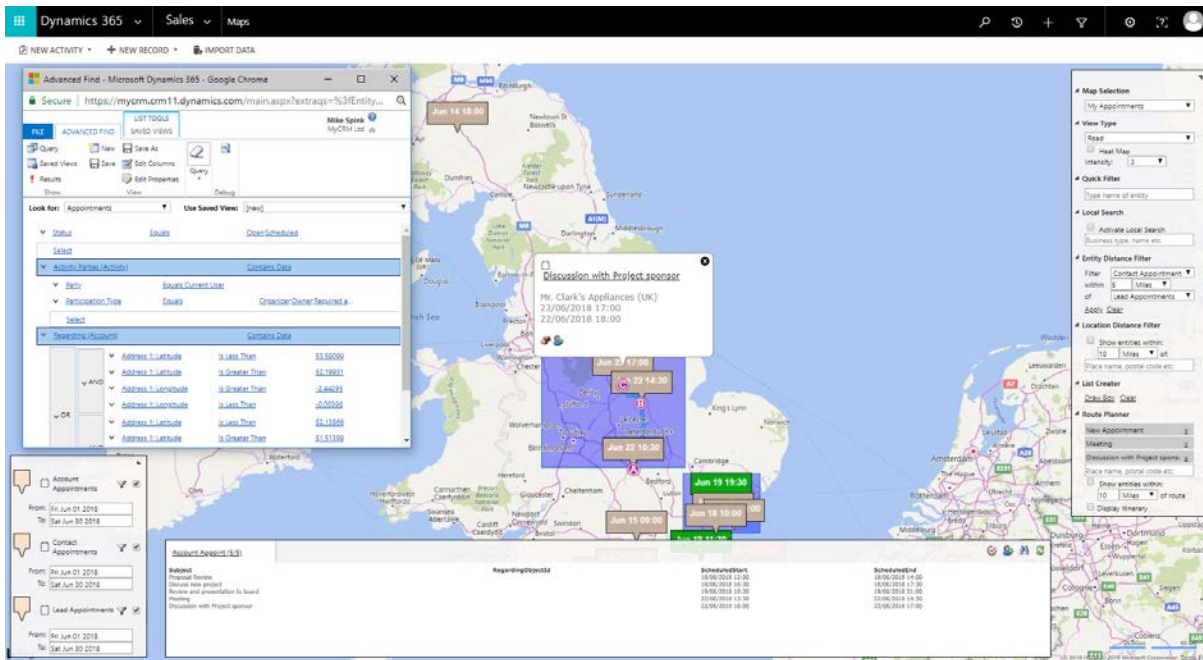
eMap enhances your day to day productivity, which means less time is wasted searching for records as your engineers or sales people can quickly open appointments and customer records. eMap also has a unique feature of being connected to a local search database, which means that finding local business types is even easier to do.

Setting 'Appointment Views' on the map
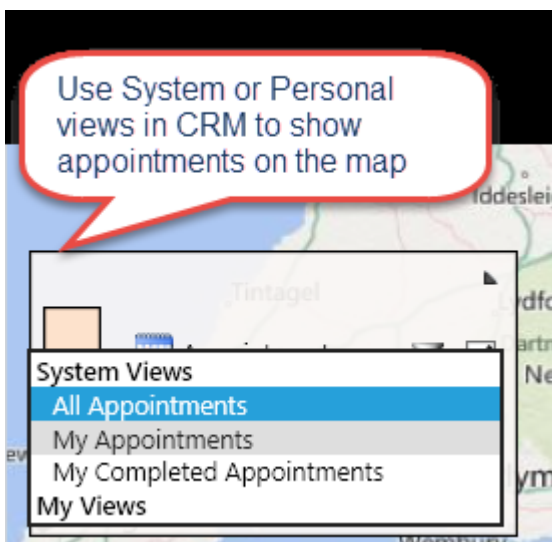
One of the great features of Microsoft Dynamics 365 and CRM 2016 is the ability to build and configure system views and personal views. The latest version of eMap provides highly effective 'Appointment Management' functionality that takes appointment and calendar management to the next level. End users are able to make use of personal views or views created by system administrators, to view their own as well as other colleague's active, future or previous appointments on a map.

The second custom filter enables you as a user to only show relevant appointments by the range selected on the list.

This can help if there are a lot of appointments showing on the map or you are viewing a collection of users. The filter gives you or a user the option to select 'All', 'Today', or other future options for active appointments.
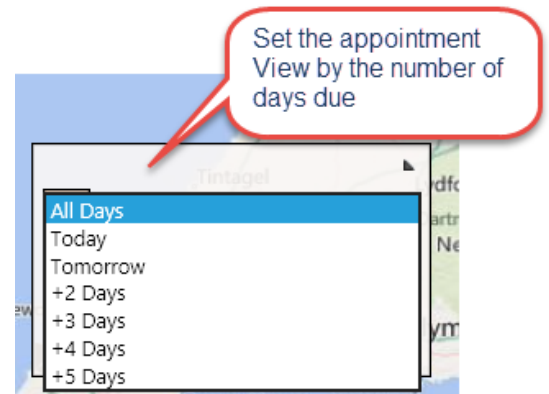
eMap offers a great many productivity enhancements for Dynamics 365 and CRM, delivering an array of key functional areas of improvement, each one delivering a great end user experience through the use of the enhanced data visualisation. eMap is easy to use and helps to boost Dynamics 365 and CRM end user adoption.

You can refer to other eMap documentation or the full user guide from the MyCRM Download Centre.