Created by MyCRM Ltd

eMap

User Guide – Case Management

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About This Guide

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

With the latest release of MyCRM eMap, we have now included the functionality to manage your CRM Cases by location. This is a great value add for Customer Service team members that manage Cases and also for those Engineers working in the field who are tasked to visit sites.

From a quick glance of the eMap screen, a Customer Services Agent, Field Engineer and importantly, an Account Owner can easily identify cases in a given area. If the case requires an on-site visit, then eMap appointment management capabilities can be used to plan the visit and scheduled calendar appointments.

Get a global view of Cases using eMap (below)
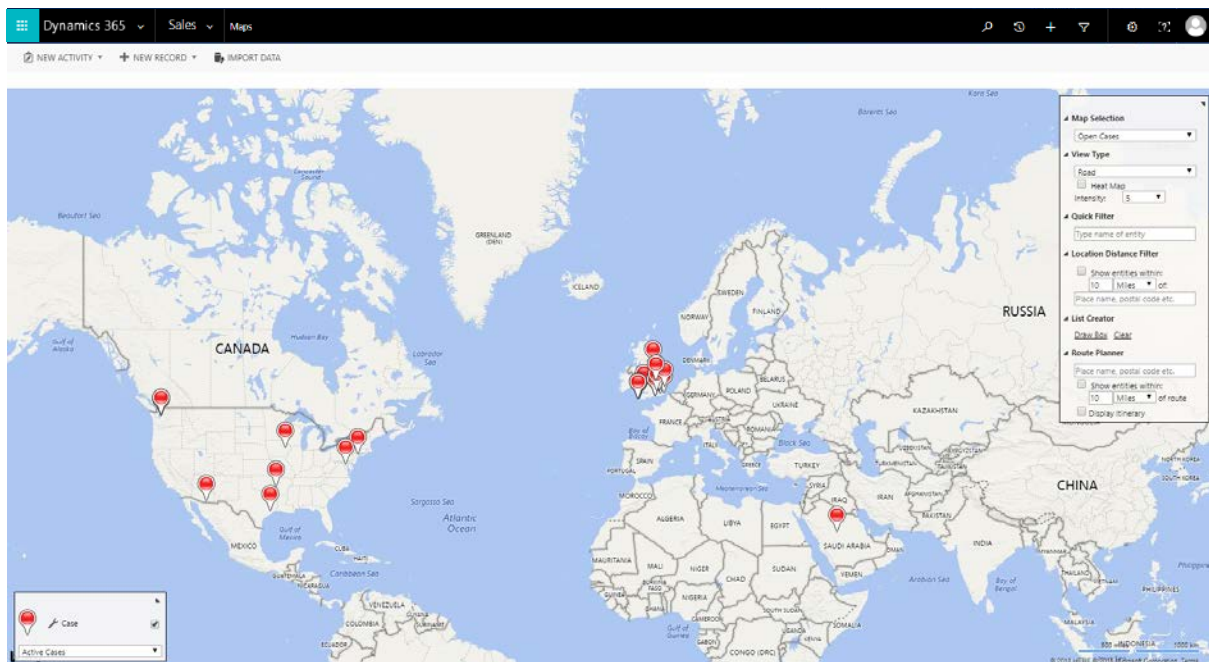
All cases demand action and what better than to be able to visualise and respond to your Case 'Hot Spots'.

The Hot spots show up on the map by eMap heat mapping the number of cases. Cases are counted and number of cases reflected by the intensity of the hot spot.
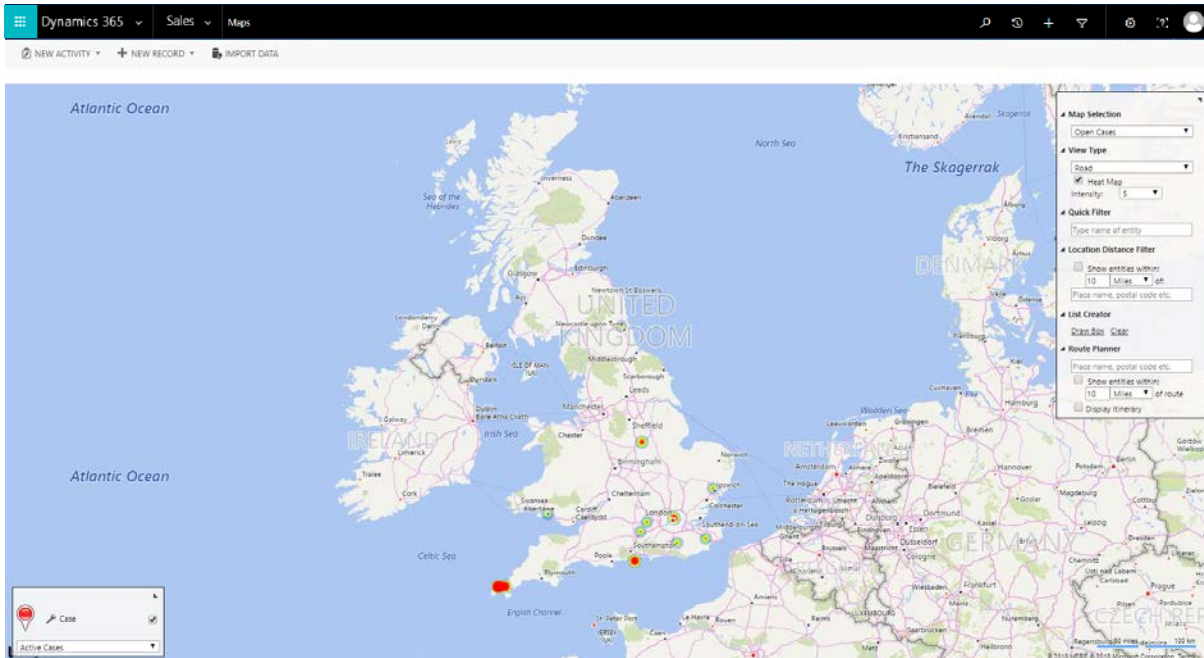

You can switch back to standard view to highlight the cases that account for the degree of heat in the hot spot. Example (below) shows several cases belonging to one customer.
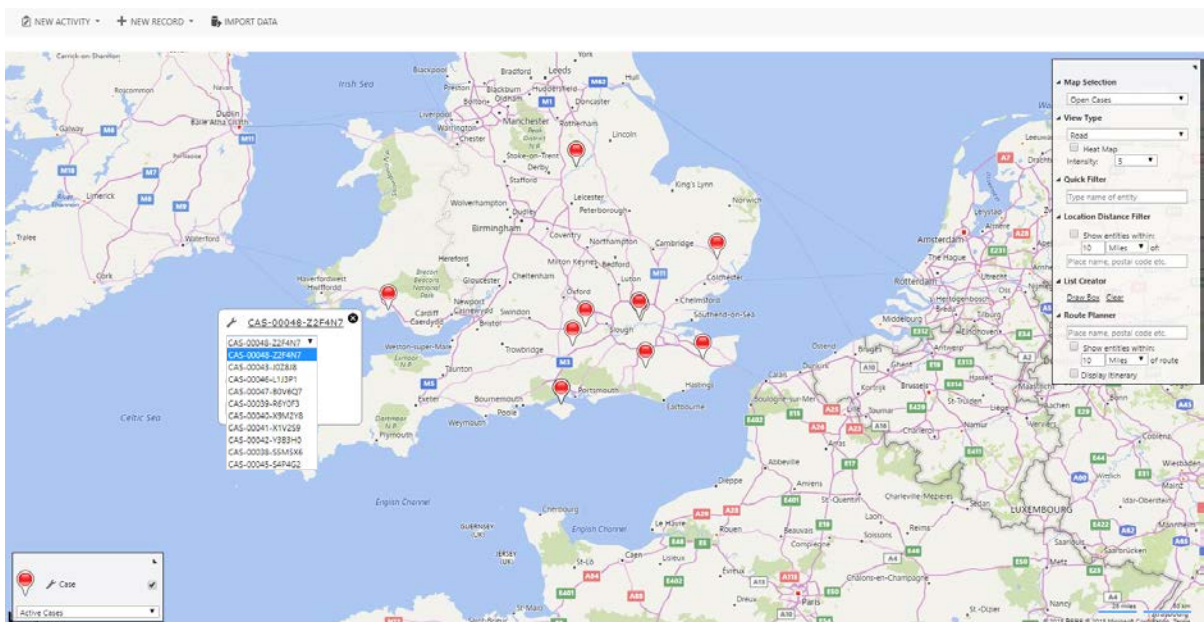
It is very simple to open each case record from within the map view to display the case record for operators to take necessary actions to resolve the case using standard Dyamics 365 or CRM functionality (below).
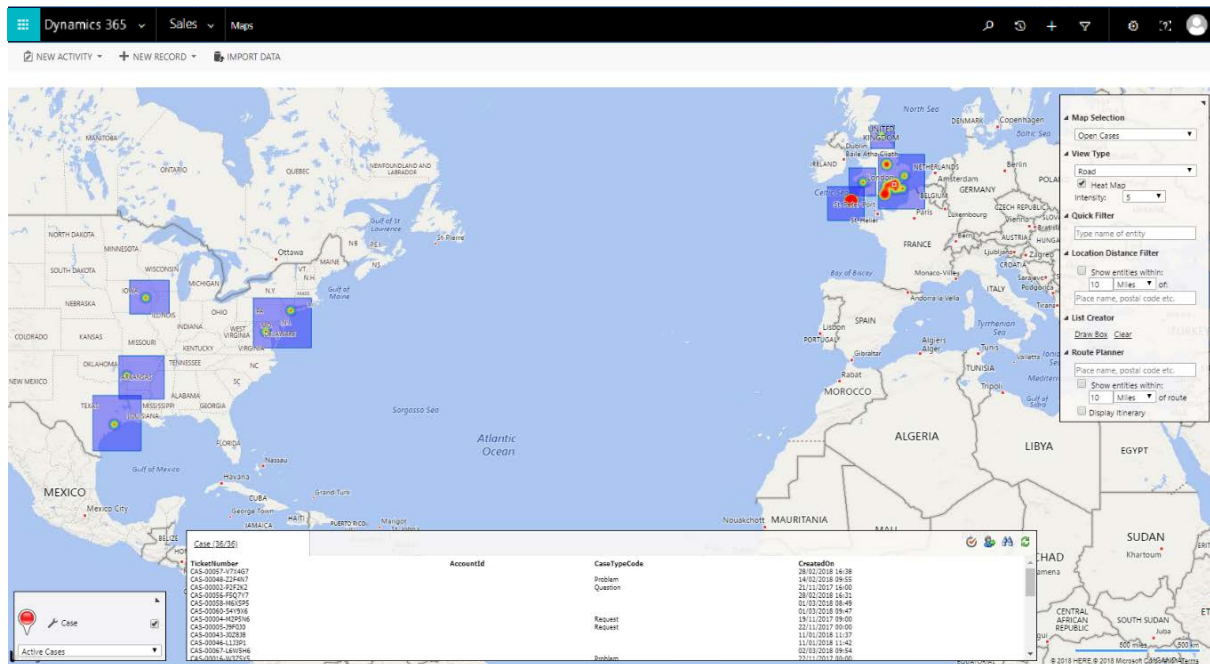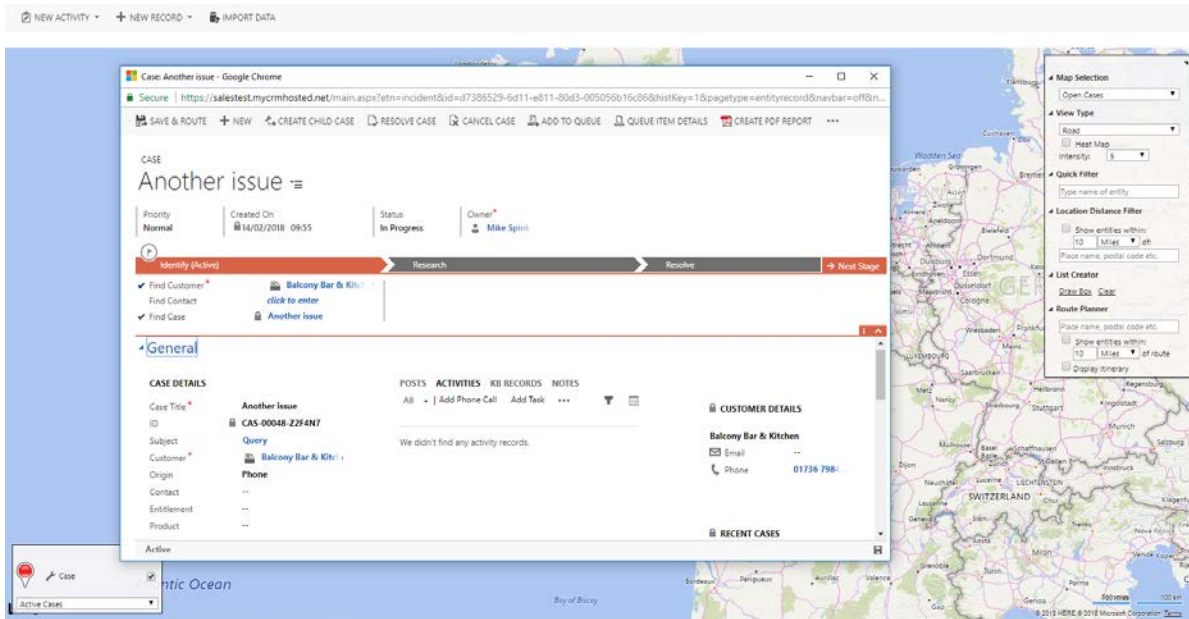
Setting 'Case Views' on the map
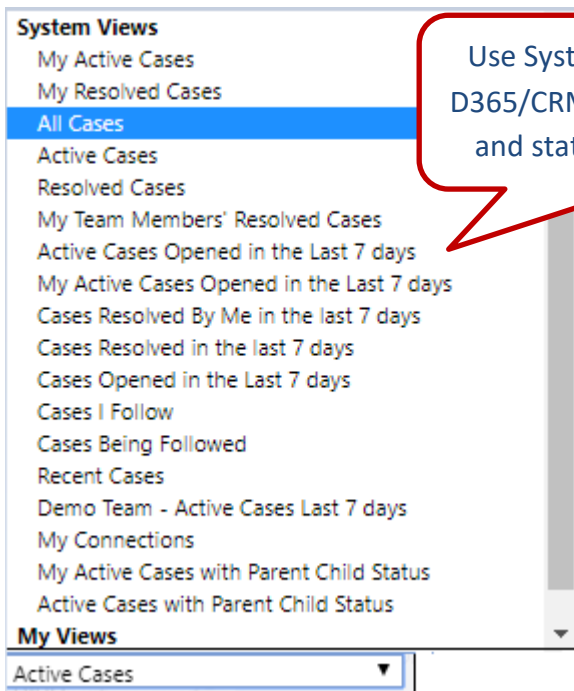
Use System or Personal views in D365/CRM to show different types and status of cases on the map

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 'Case Management' functionality that takes case 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.

Draw Box to Better Manage and Enable Further Analysis

Users can also use the 'Draw Box' function to highlight specific areas on a map view to collate the cases into a list. This can be done from either the Pin view or Heat Map view (below).

eMap Visualisation Improves Case Awareness

eMap provides your organisation with a far greater sense of awareness thanks to being able to visualise cases on a map. It allows users to see how effective their response is, based on being able to see the number of cases and their severity (based on the number of cases) using Heat Mapping Hot Spots.

eMap enhances day to day productivity, which means less time is wasted searching for records as your Customer Support Teams, Engineers and Sales Account personnel people can quickly identify problems and work together to keep your customer content.

eMap offers a great many other productivity enhancements for Dynamics 365 and Dynamics CRM 2016, 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.