

# eMap

## eMap for Microsoft CRM

The MyCRM eMap solution extends the Microsoft Dynamics CRM platform even further by introducing a full integration with the Bing Map service which is used for rendering data in CRM on a map directly within the CRM environment.

Maps and Map layers are easily created directly from the CRM environment, but eMap is so much more as you can now use the solution to view data regionally, create marketing lists for given areas, or be given the ability to work with data to create CRM activities, run workflows or assign records to other users.



The flexibility of the eMap solution allows your organisation to easily sort data by country, region, or sales area to get a snapshot of what opportunities are active and closed. All map layers are created by using CRM views so it is easy to visualise a break down of active cases for existing customers and engineers based on CRM users.

The eMap solution brings a new dimension to using Microsoft Dynamics CRM within your organisation, by delivering a snapshot of data across the enterprise that is easily configured and easy to work with.

### For Additional Information

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## eMap features for Microsoft Dynamics CRM

The MyCRM eMap solution has a number of unique features that extends functionality for an end user in CRM.

### Features

- Create multiple maps in CRM
- Create multiple layers per map
- Select road or aerial view of any map
- User the built map quick filter to find records
- Use the entity distance filter to help with rout planning
- Use the locations distance filter to show record near a given location
- Create lists that can be used for marketing or other bulk actions
- Use the router planner to create a route between one or more given locations and see records on route.
- Get driving instructions for given routes
- Place maps on dashboards
- Place maps on individual records within the CRM
- Geo-Code all data with a Longitude and Latitude value
- Create CRM activities directly from the map
- Use Advanced find to filter a map layer
- Assign individual records to a marketing list
- Assign individual records to other CRM users.
- Data Feed Integration
- Appointment Management
- Custom Jscript Functions

A map can include any of the above features and contain several layers of data that over lap on any one map. A layer is used to represent data from a CRM view and can be of a single entity record type i.e. Accounts, Contacts, Opportunities, Cases or even a Custom entity that have been created and configured as part of your organisations role out of Microsoft CRM.

We offer additional features with Map integration but these are covered in the “Managing Appointment with Maps” and “Managing the Business Data feed with Maps” documentation

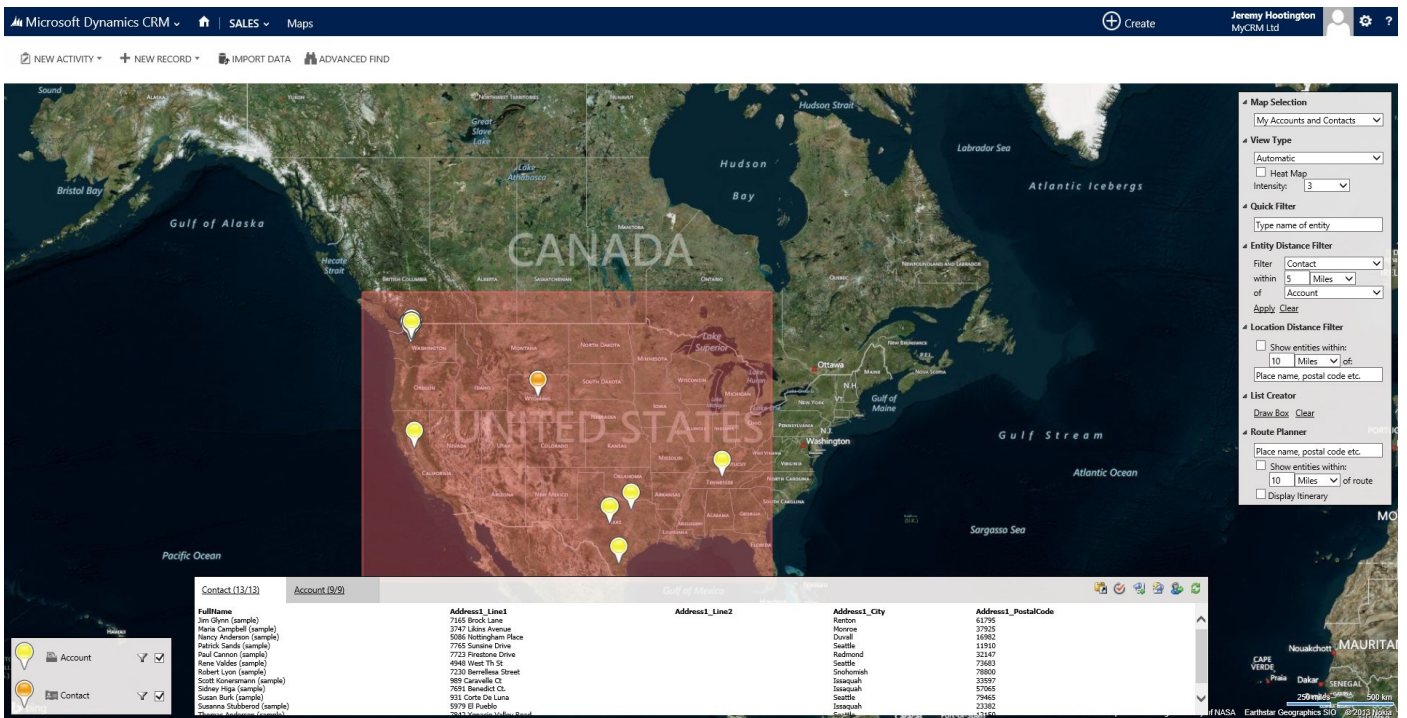
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## eMap inside view in Microsoft CRM.

The eMap solution embeds directly into the Microsoft CRM environment. From the top navigation under the different topic areas like Sales you can access maps and map functionality or directly on the entity record when the record is loaded in to view.



As an end user of the eMap solution can easily toggle data views and layers from the layer key on the left and load different maps from the feature toolbar on the right.

Records displayed on the map can be opened directly from the map interface along with actions being carried out like add to marketing list, create activity or add to route.

In this latest version additional feature include heat maps, and pivoting data.

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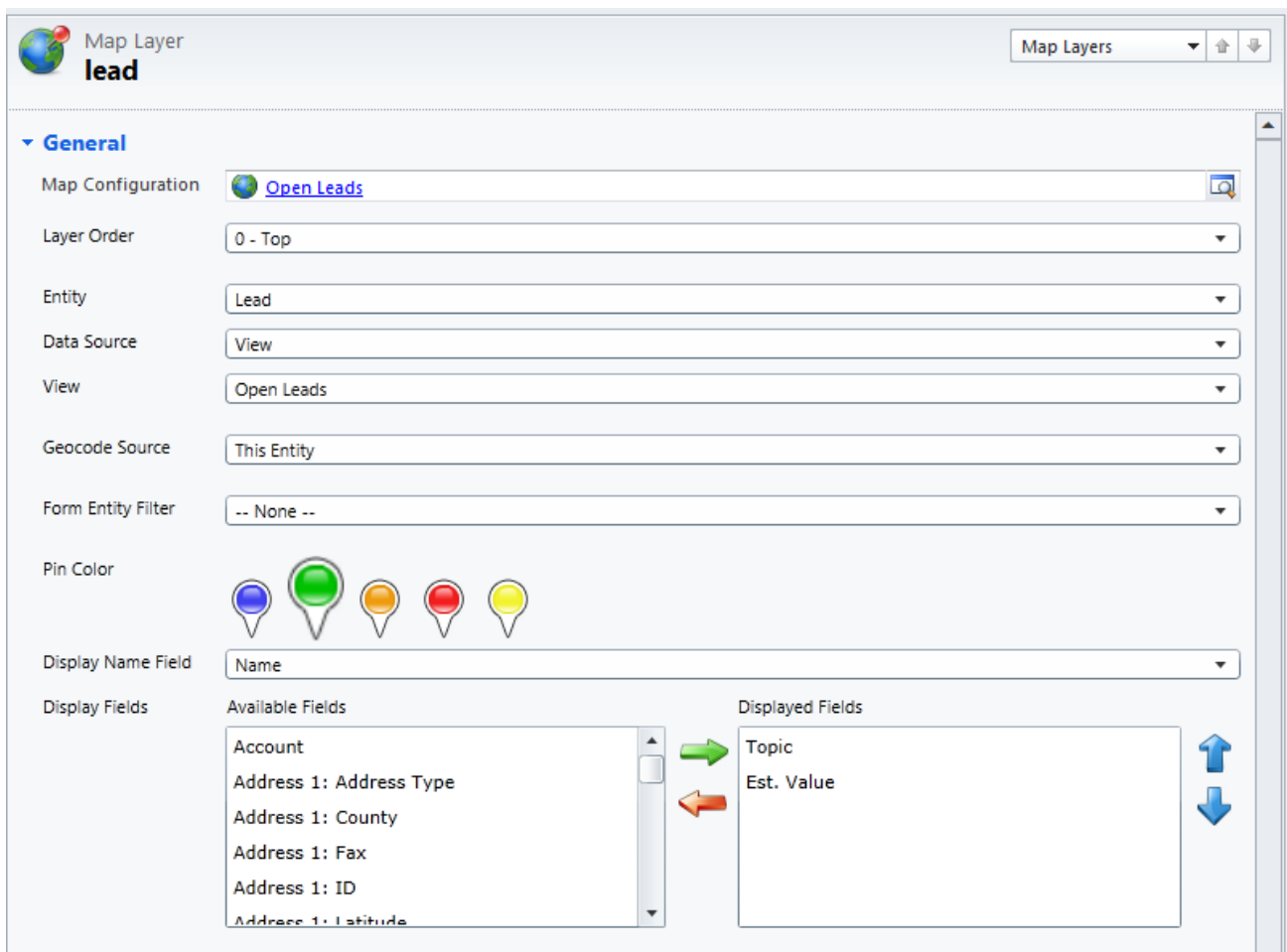
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## eMap configuration for Microsoft Dynamics CRM

The MyCRM eMap solution for Microsoft CRM is fully configurable enabling multiple maps and multiple layers to be created, each map has all the standard features of a map integration including full zoom.

As part of the solution, full configuration capability has been built into the CRM interface which enables all data fields to be displayed and pin colours to be selected for the different record views on the layer.

Full configuration documents are provided along with extended user guides as the solution can be used in many different ways to visualise data held in the CRM system.



The screenshot shows the configuration interface for a map layer named 'lead'. The interface includes a 'Map Layers' dropdown menu at the top right. The main configuration area is divided into several sections:

- General:** Contains dropdown menus for 'Map Configuration' (set to 'Open Leads'), 'Layer Order' (set to '0 - Top'), 'Entity' (set to 'Lead'), 'Data Source' (set to 'View'), 'View' (set to 'Open Leads'), 'Geocode Source' (set to 'This Entity'), and 'Form Entity Filter' (set to '-- None --').
- Pin Color:** Features five colored pin icons (blue, green, orange, red, yellow) for selection.
- Display Name Field:** A dropdown menu set to 'Name'.
- Display Fields:** A field selection interface with two columns: 'Available Fields' and 'Displayed Fields'. The 'Available Fields' list includes 'Account', 'Address 1: Address Type', 'Address 1: County', 'Address 1: Fax', 'Address 1: ID', and 'Address 1: Latitude'. The 'Displayed Fields' list includes 'Topic' and 'Est. Value'. Green and red arrows indicate the movement of fields between the two columns, and blue arrows on the right indicate the ability to reorder the displayed fields.

We recommend you review the configuration guide for eMap to see all functionality and layers.

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