

Created by MyCRM Ltd

eMap

User Guide – Opportunity Management

REF - eMap.Opportunity Management.pdf

About This Guide

The purpose of this guide is to give a high-level overview of how to manage your CRM Opportunities, 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.

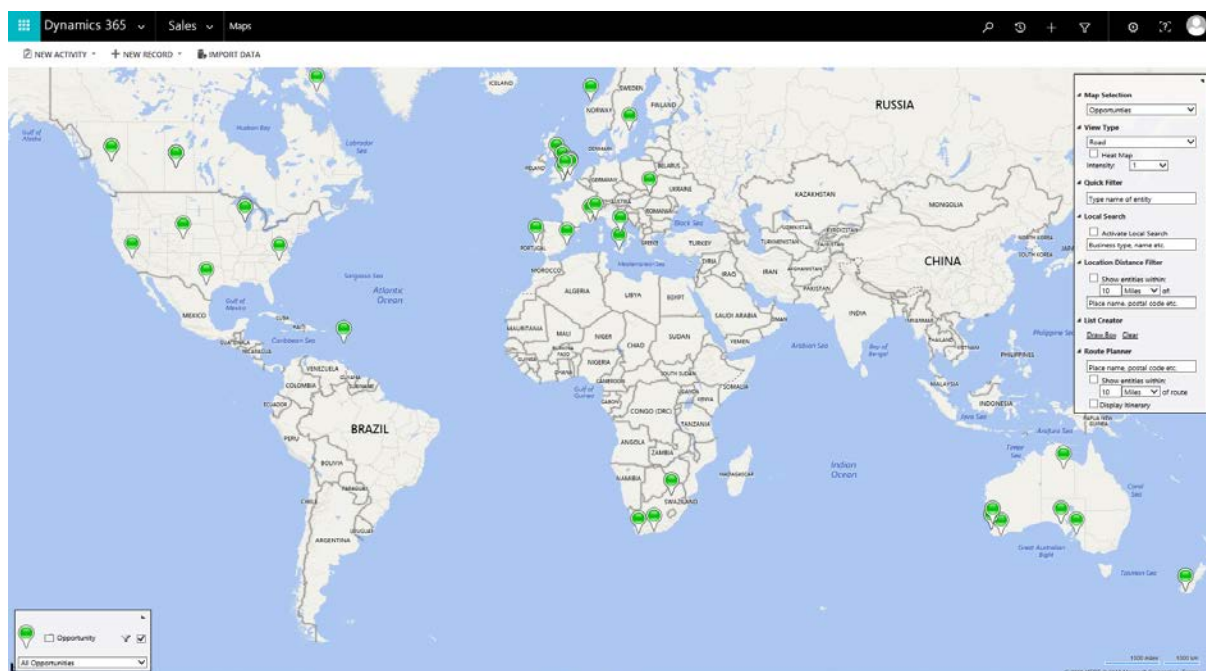
Managing Opportunities with eMap

With the latest release of MyCRM eMap, we have now included the functionality to manage your CRM Opportunities by their location. This is a great value add, for Management and Sales team members that are responsible for sales and wish to identify where sale opportunities are located. For Sales people working in the field, it also provides visibility of their opportunities by location which helps to schedule convenient meetings based on localising travel distance when visiting a number of potential/existing customer sites that represent opportunities.



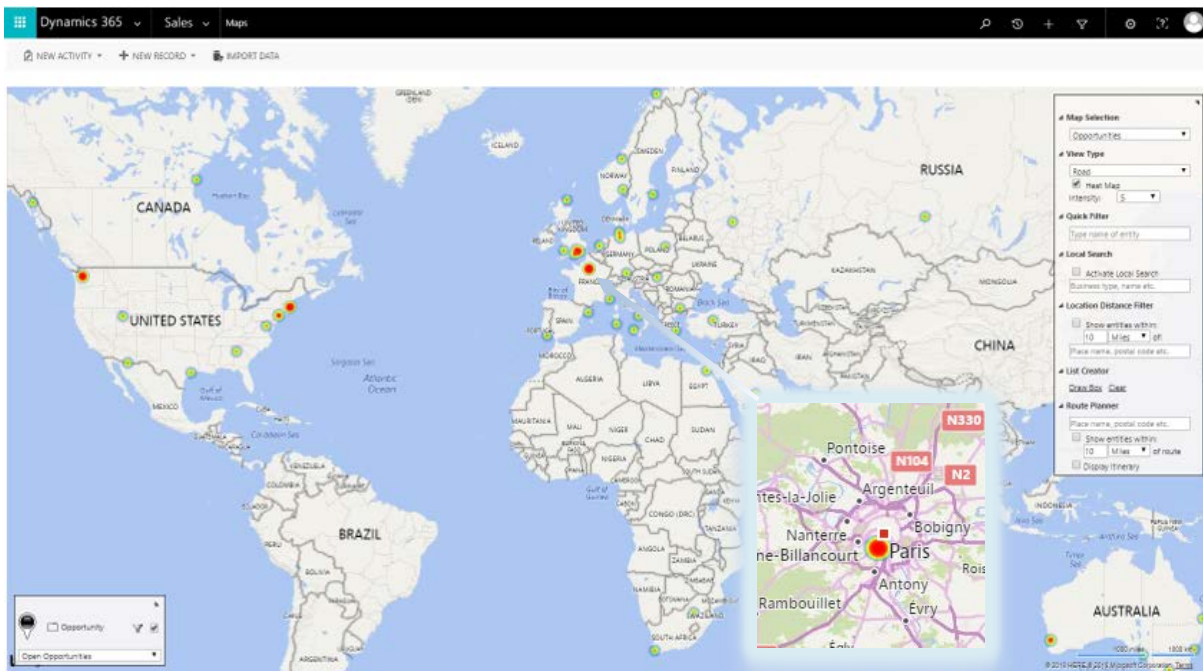
From a quick glance of the eMap screen, sales and management personnel can easily identify sales opportunities in any given geographical area. If the opportunity requires an on-site visit, then eMap appointment management capabilities can be used to plan the visit and scheduled calendar appointments accordingly.

Get a complete global view of Opportunities using eMap (below)

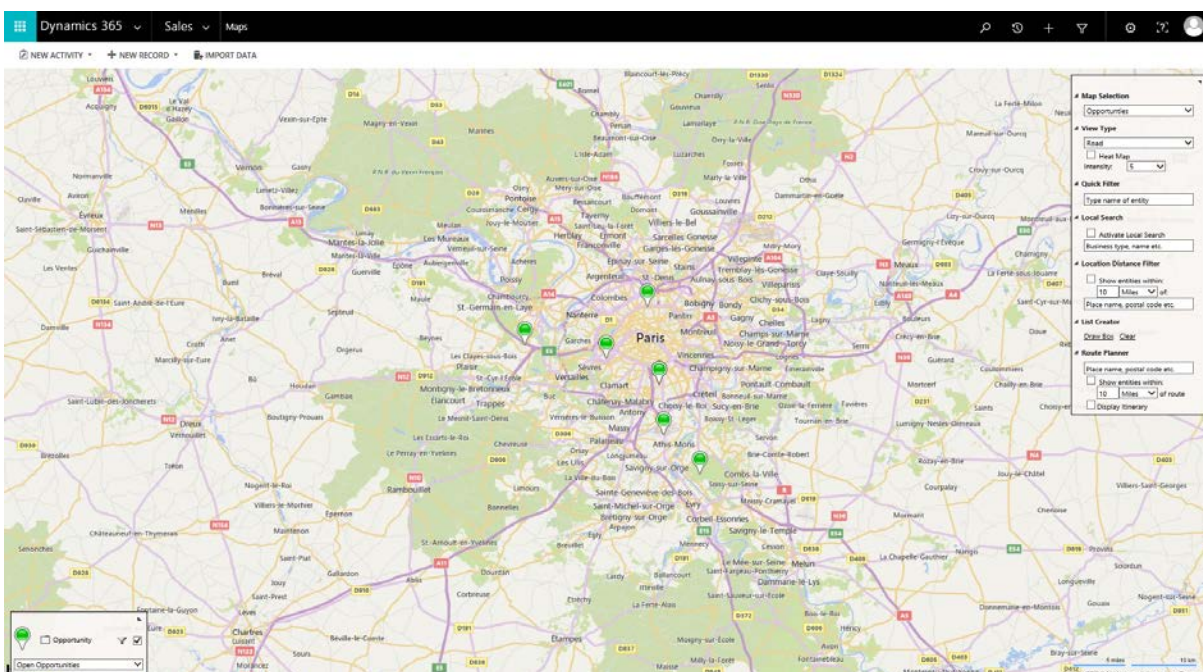


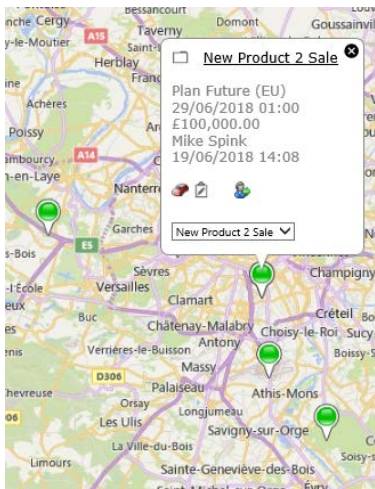
All Opportunities demand constant engagement and appropriate sales actions, so what better than to be able to visualise and respond to your Opportunity ‘Hot Spots’.

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



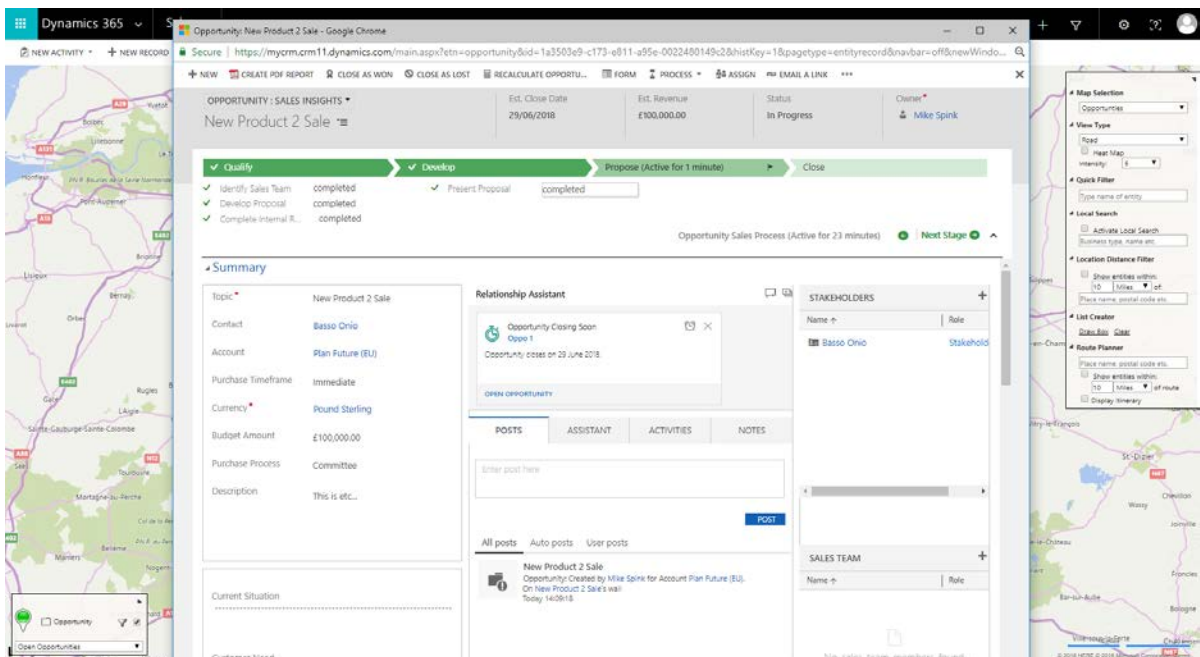
You can switch back to standard view to highlight the opportunities that account for the degree of heat in the hot spot. Example (below) shows several opportunities that exist for Accounts located in the south of Paris, France.



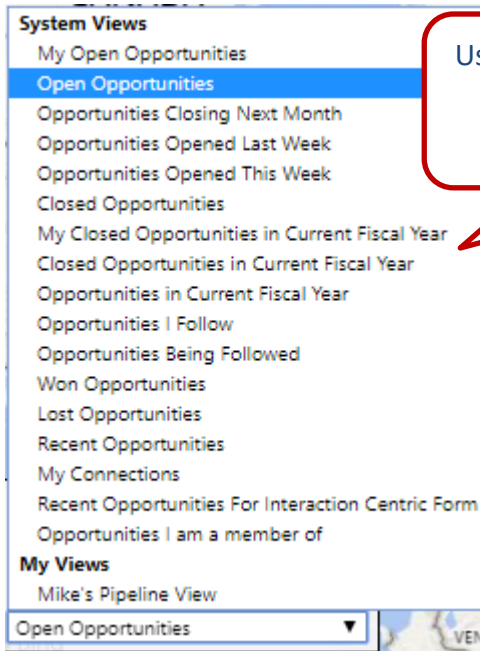


It is very simple to open each Opportunity record from within the map view to display the opportunity record for users to take necessary sales actions to using standard Dynamics 365 or CRM functionality.

First you simply select the appropriate opportunity pin (left) and then click on it to open the record (below)



Setting 'Opportunity Views' on the map

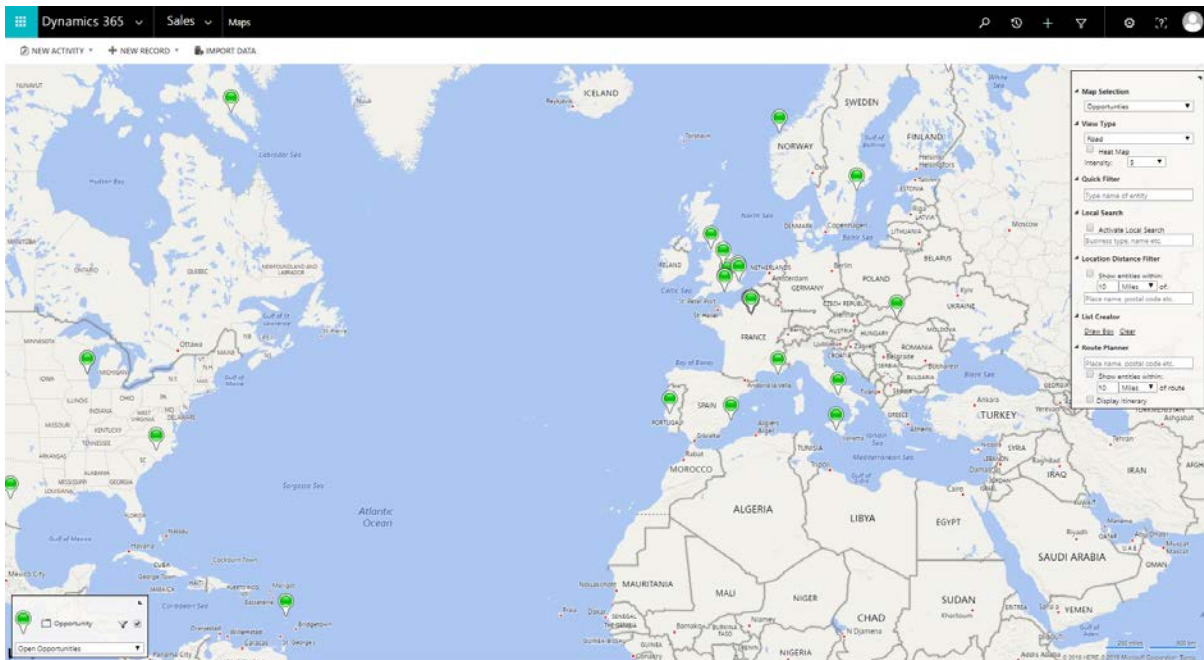


Use System or Personal views in D365/CRM to show different types and status of Opportunities on the map

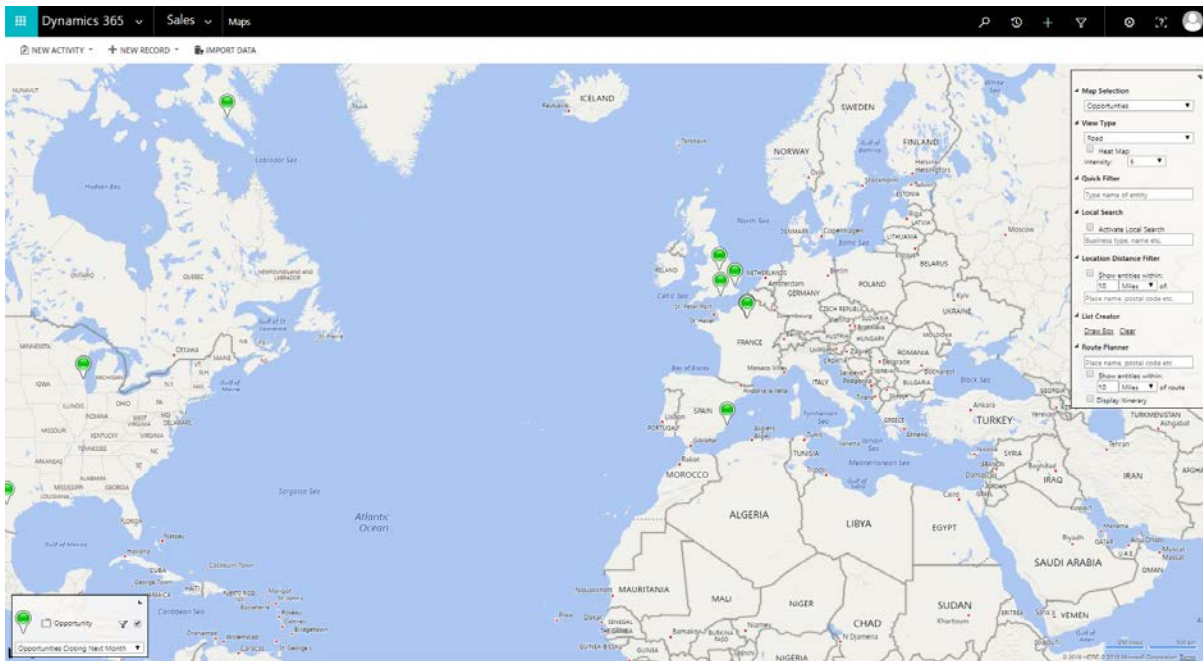
One of the great features of Microsoft Dynamics 365 and CRM 2016 is the ability to build and configure system views and personal views. The latest version of eMap provides highly effective Opportunity Management functionality that takes sales opportunity management to another level. End users are able to make use of personal views or views created by system administrators, to view their own as well as other colleague's active pipeline, closed as well as lost opportunities on a map.

Selecting a different view provides a completely different perspective – just look at how things change below. The first view is for 'Open Opportunities', whilst the second represents 'Opportunities Closing Next Month'.

All 'Open Opportunities' (below)



Opportunities ‘Closing This Month’ (below)

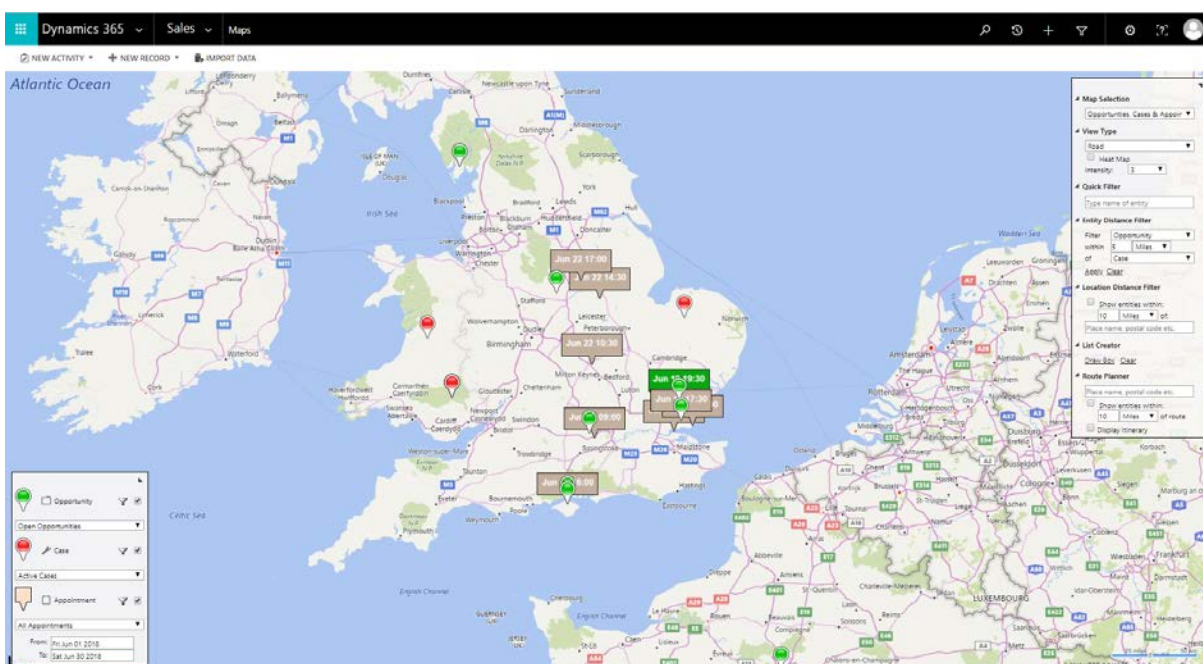


eMap will display any view that has been defined in Dynamics 365 or Dynamics CRM 2016. This might include ‘Closed Opportunities’ or even perhaps ‘Lost Opportunities’.

eMap also allows you to overlay other layers on the map. The example below shows ‘Open Opportunities’, ‘Cases’ and ‘Appointments’ together in one view, which can be filtered to select or deselect certain values.

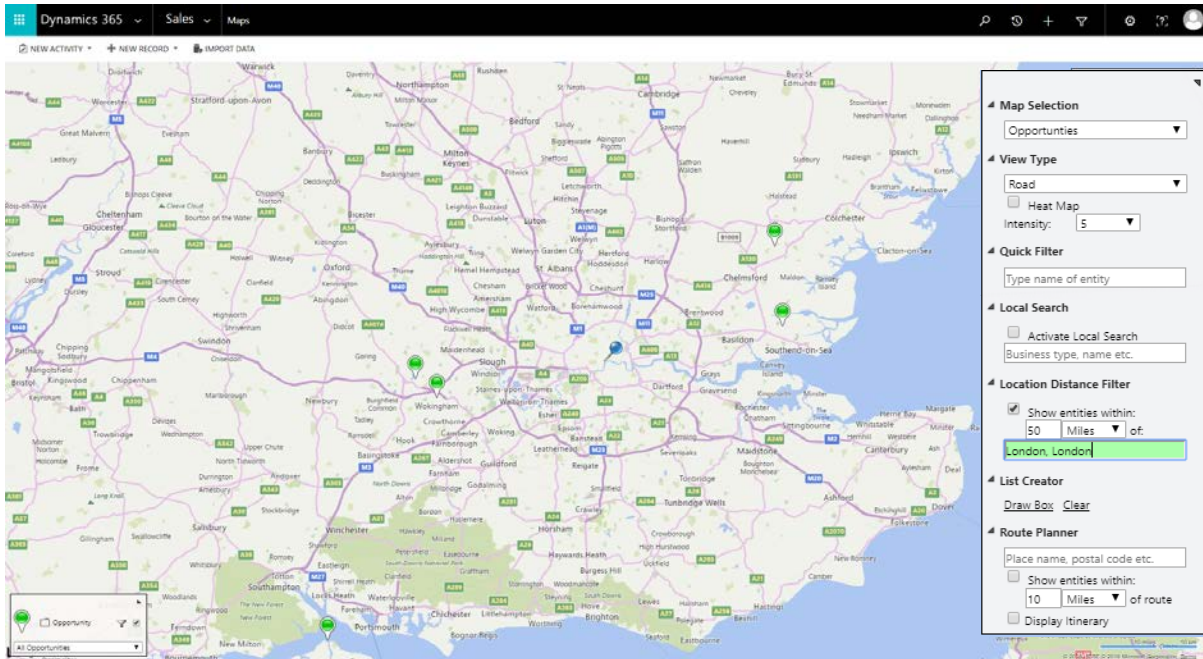
Using eMap Layers

eMap using layers to provide an overlay of several entities in one view (below)



Location Distance Filters

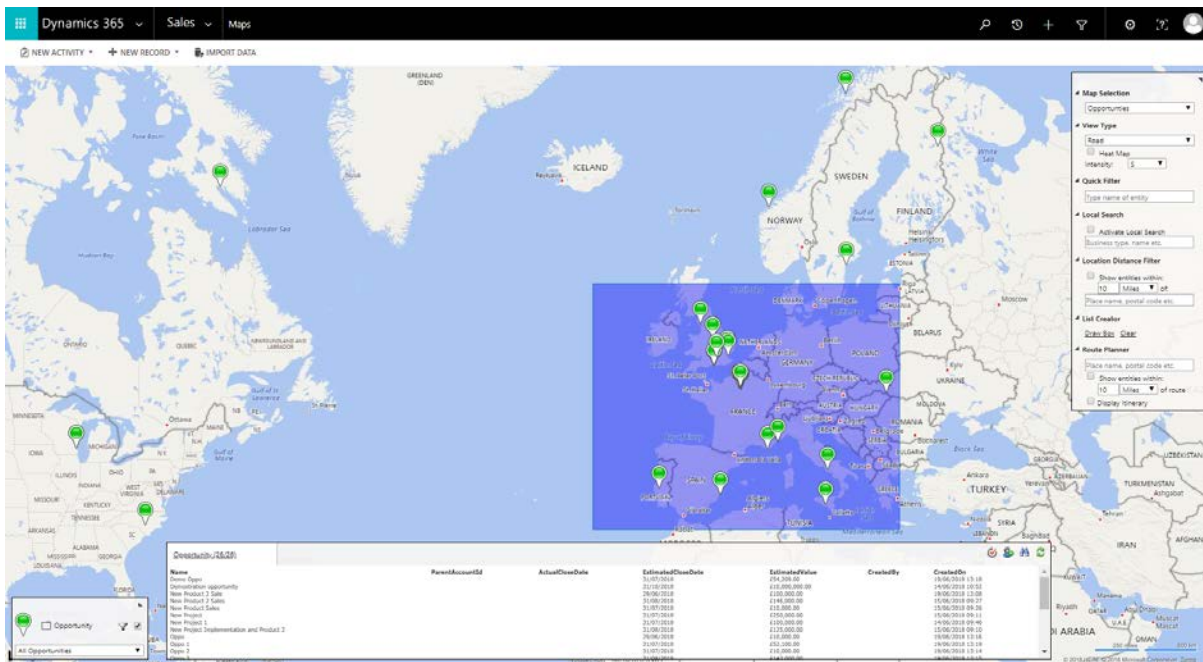
You can also pin-point Opportunities based on a distance from a certain location. In the example below eMap's Location Distance Filter function is used to search for Opportunities within 50 miles of central London, UK. The blue headed pin represents the central point in London.



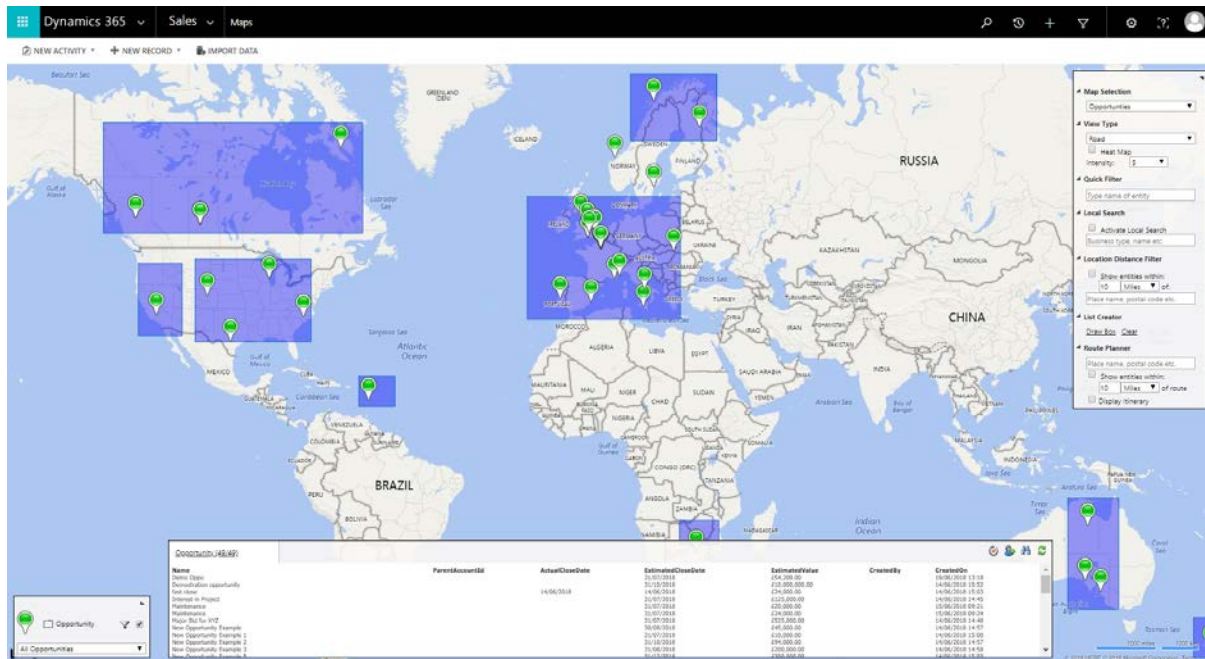
'Draw Box' to Better Manage and Enable Further Analysis

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

Using Draw Box function with Pin View



Using Draw box (multiples) with Heat Map View



The screenshot displays the Dynamics 365 eMap interface. The top navigation bar includes 'Dynamics 365', 'Sales', and 'Maps'. The main area shows a world map with several blue rectangular 'Draw Boxes' overlaid on various regions, including North America, Europe, and Africa. A 'Heat Map' view is active, indicated by the 'Heat Map' selection in the right-hand panel. Below the map is a data table with columns for Name, Parent Account ID, Actual Close Date, Estimated Close Date, Estimated Value, Created By, and Created On. The table contains several rows of data, including entries for 'New Opportunity Example 1' and 'New Opportunity Example 2'.

Name	Parent Account ID	Actual Close Date	Estimated Close Date	Estimated Value	Created By	Created On
New Opportunity Example 1		14/06/2018	31/03/2019	100,000.00		14/06/2018 13:18
New Opportunity Example 2		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:20
New Opportunity Example 3		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:21
New Opportunity Example 4		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:22
New Opportunity Example 5		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:23
New Opportunity Example 6		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:24
New Opportunity Example 7		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:25
New Opportunity Example 8		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:26
New Opportunity Example 9		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:27
New Opportunity Example 10		14/06/2018	14/06/2018	100,000.00		14/06/2018 13:28

eMap's Draw Box functionality allows you to run various actions from the list view provided, including workflow, reassigning records to another user or team or passing to the advanced find solution to further query the data in Dynamics 365 and CRM.

eMap Visualisation Awareness Improves Opportunity Management

eMap provides your organisation with a far greater sense of awareness thanks to being able to visualise Opportunities on a map. It allows organisations to see from a geographical or region based perspective how wide their sales opportunities reach. It also provides a quick and easy way to identify sales 'Hot Spots' using eMap's Heat Mapping functionality. This allows users to recognise and build upon the most potentially lucrative areas for sales.

eMap enhances day to day productivity, which means less time is wasted searching for records as your Sales Account personnel and Management teams can quickly identify opportunities by their location and helps them to work as effectively as possible to help to close sales.

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.