

Created by MyCRM Ltd

eMap

Overview Guide

REF – eMap.Overview.pdf

About This Overview Guide

The purpose of this guide is to give a high-level overview of eMap and what functionality it delivers to significantly enhance Microsoft Dynamics 365 / or when on premise, Dynamics CRM 2016.

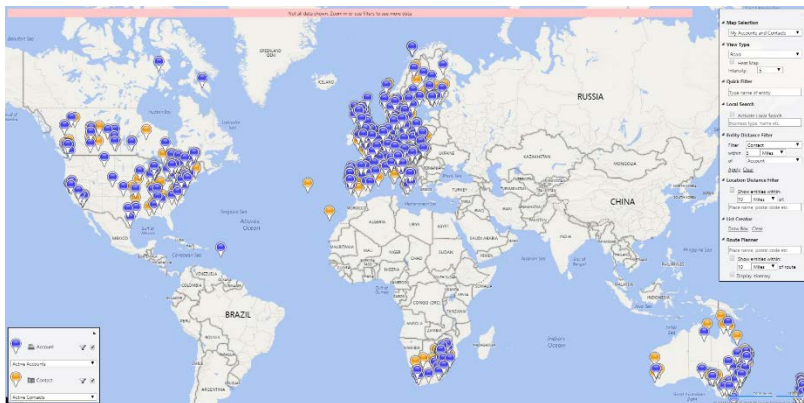
Installation

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.

eMap for Microsoft Dynamics 365 and CRM 2016

MyCRM's eMap solution extends the Microsoft Dynamics 365 and CRM solutions by introducing a full integration with the Bing Map service, which is used for rendering data on a map directly within the Microsoft Dynamics 365 or CRM environment. Maps and Map layers are easily created 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 by sales area, and to get a snapshot of what opportunities are active and what are closed.



All map layers are created by using Dynamics 365 and CRM views, so it is easy to visualise a break-down of active cases for existing customers and for engineers assigned to cases. The eMap solution brings a new dimension to using Microsoft Dynamics 365 and CRM, by delivering a

visualisation of data across the enterprise that is easily configured, easy to work with and which helps manage customer engagement easier than ever before.



eMap Enhancement of Microsoft Dynamics 365 and CRM

The MyCRM eMap solution has a number of unique features that really extends functionality for all end users of Microsoft Dynamics 365 and CRM.

eMap Key Features & Benefits:

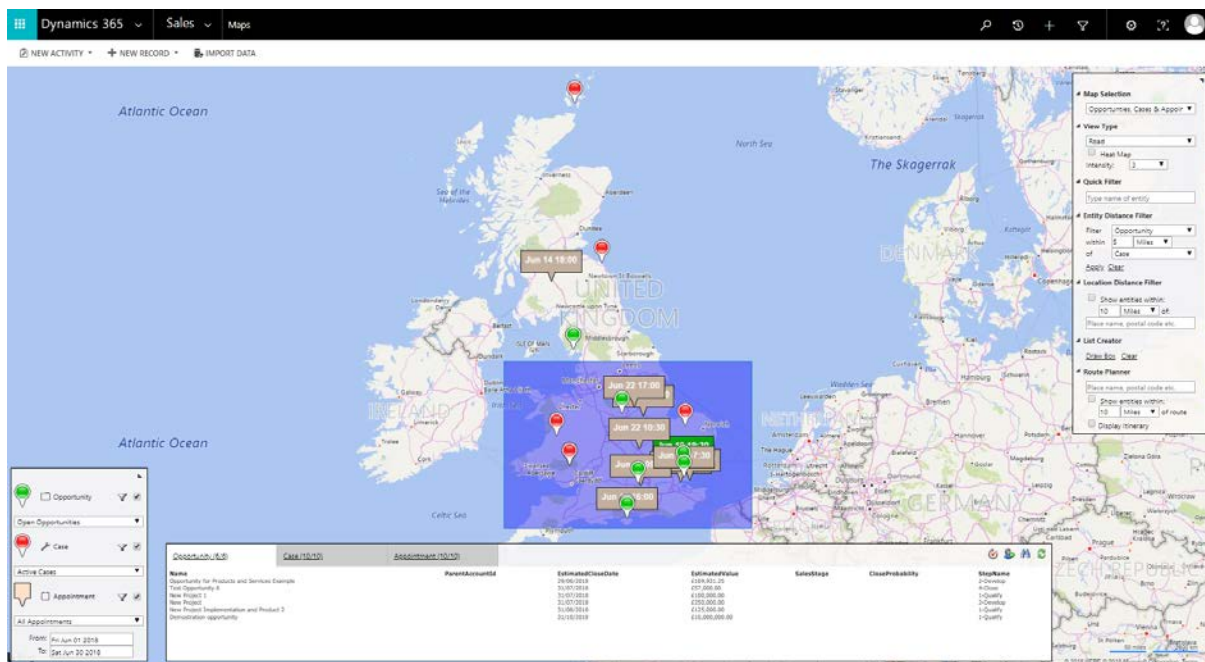
- **Create multiple maps in CRM** – visualisation enables a greater understanding of your data and performance
- **Create multiple layers per map** – provides overlays to relate entity views to each other
- **Select Road or Aerial view of any map** – provides a choice to suit personal view preference and requirements to understand terrain/location
- **Use the built-in map quick filter to find records** – find what you want quickly and easily
- **Use the entity distance filter to help with route planning** – speeds up route planning and makes better use of your time by booking appointments to fit your travel time and schedules
- **Use the locations distance filter to show record near a given location** – pinpoint and target specific entities based on whereabouts and location schedule. Recognise your key “hot spots” of activity and achievement.
- **Create lists that can be used for marketing or other bulk actions** – improve the effectiveness of marketing by being able to easily target entities to be included in campaigns and quick-campaigns.
- **Use the router planner to create a route between one or more given locations and see records on route** – eliminates the need to use other third-party route planning tools. Allows complete visibility of all appointment activities on a route and allows other new appointments to be added based on their proximity and the feasibility to suit existing and new appointment schedules.
- **Get immediate driving instructions for given routes** – simple one click for each location provides a full itinerary of travel including distances and time required.
- **Place maps on dashboards** – imbedding maps to provide richer end user awareness of records and relevance to other entity types.
- **Place maps on individual records within Dynamics 365 and CRM** – deliver meaningful visual representation of an entity. For accounts show location and allow local search to find other potential customers locating in the surrounding local area.
- **Geo-Code all data with a Longitude and Latitude value**
- **Create CRM activities directly from the map** – saves time by easily creating activity without losing sight of Map view.
- **Use Advanced find to filter a map layer** - gain even more insight by further analysis of lists created by eMap
- **Assign individual records to a Marketing list** – quickly bulk assign from within eMap
- **Assign individual records to other CRM users** – simple and effectiveness assignment of entity records reported using eMap.
- **Data Feed Integration**
- **Appointment Management** – helps to make the most of time available by scheduling appointments as efficiently as they can be. Concentrates individual effort and travel distance to suit the location of appointments.
- **Custom Jscript Functions**

A map can include any of the above features and contain several layers of data that provides an overlay on any one map. A layer is used to represent data from a Dynamics 365 or 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 organisation's role out of Microsoft Dynamics 365 or CRM.

We offer many additional features and benefits with eMap and these are covered into other eMap documentation available.

eMap – Provides the View of What's Important in YOUR World!

The eMap solution embeds directly into the Microsoft Dynamics 365 and CRM environments. 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 into view.



Name	ParentAccount	Estimated/Closed Date	Estimated/Actual Value	SalesStage	CloseProbability	StepName
Opportunity for Products and Services Example		26/06/2018	1284,802.25			1-Create
Test Opportunity A		26/07/2018	607,800.00			1-Create
New Project 1		31/07/2018	4,100,000.00			1-Create

Any 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 (shown above).

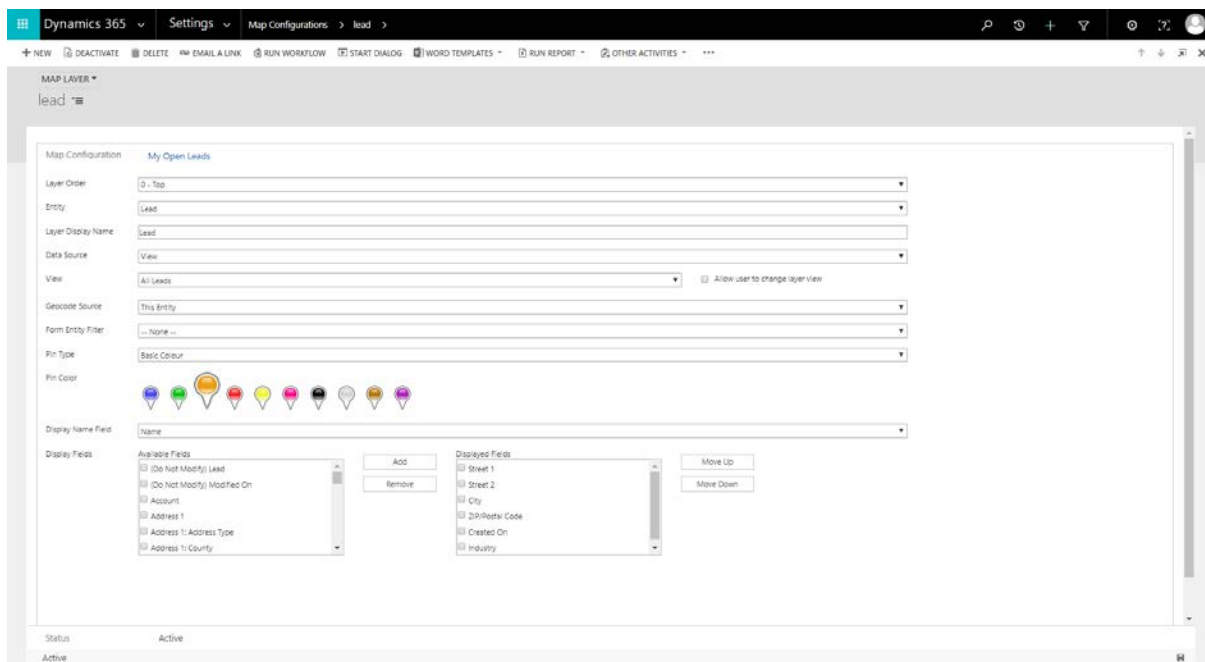
Records displayed on the map can be opened directly from the map interface along with actions being carried out like; create new lead, add to marketing list, create an activity or add to route/plan the route.

eMap Configuration for Microsoft Dynamics 365 and 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 Figure below shows eMap 'Map Layer' configuration screenshot.



eMap Visualisation Delivers Greater Awareness

eMap provides your organisation with a far greater sense of awareness thanks to being able to visualise Dynamics 365 and CRM entities on a map. It allows organisations to see from a geographical and region based perspective, just how wide their Sales, Marketing and Customer services reach is and how it is performing. It also provides a quick and easy way to identify the "Hot Spots" using eMap's Heat Mapping functionality. This allows users to recognise and build upon the most potentially lucrative areas for marketing and sales, and what areas present the best prospects to deliver services to.

eMap enhances day to day productivity, which means less time is wasted searching for records as your users and teams can quickly identify entity types by their location.

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.

For Additional Information

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