POWER OBJECTS

PowerMap

CRM 2013/2015

Service   Support   Education   Add-ons

Contents

Getting Started

To begin using PowerMap, navigate to the PowerPack section and click on PowerMap. The map will appear. Initially, it might not show any pins. To work with the map, open the panel on the right-hand side of the map that says "Click here to configure the map." If at any time you'd like to close the PowerMap control panel, simply click on the arrow in the upper right corner.
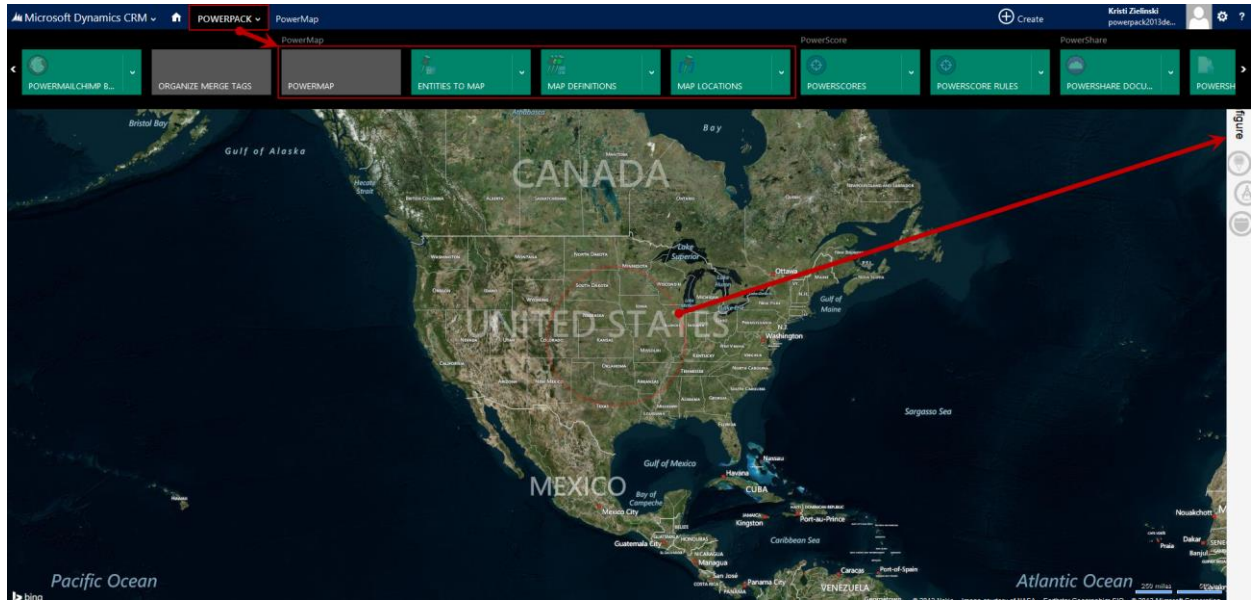

The PowerMap control panel has three sections: Legend, Saved Map Definitions, and Saved Map Locations.

If the Legend is empty (as shown in the next screen shot), select an entity to show on the map, thereby adding a row to the legend. The next section describes how to edit the legend to show the records you want.

Legend

Service   Support   Education   Add-ons
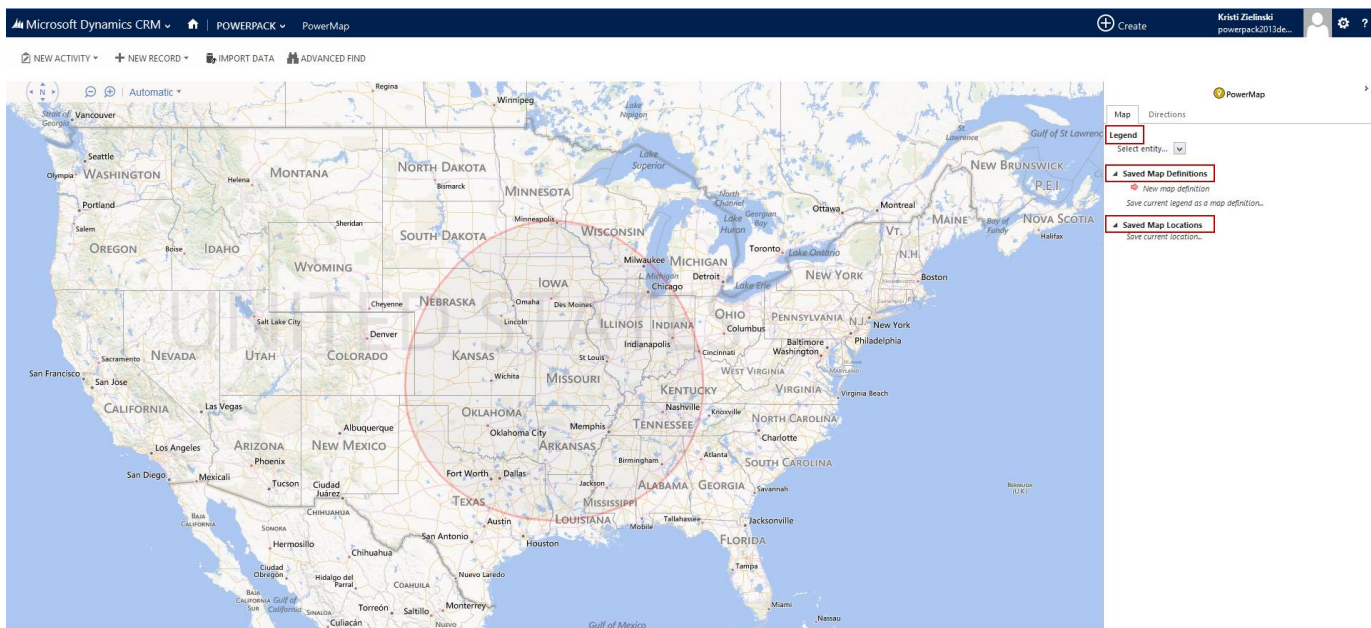
The legend describes the pins showing on the map. It is editable, so you can use the legend to control what pins display. All changes to the legend appear immediately on the map. They are temporary unless you explicitly save them, as explained in the next section.

Each row in the legend represents a CRM view whose records will be shown on the map, together with the pin or heat map chosen to show these records. The view can be a system view or one of your personal views, created from an advanced find.
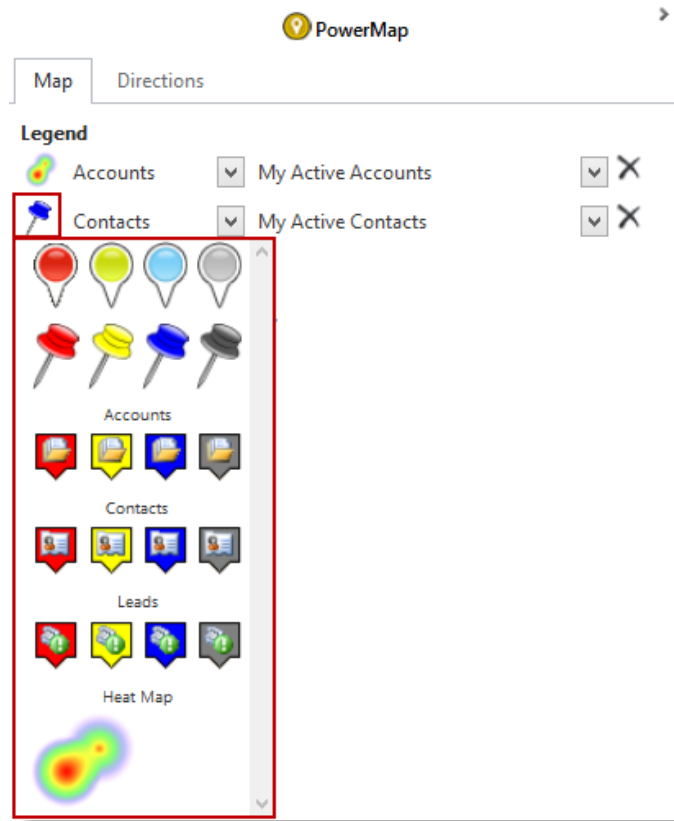

To change the pins for a view, click on the pin in the legend and select another option in the dropdown to use instead. To select an entity to map, click in the first dropdown and select an entity. In the next dropdown all system and personal views for that entity will be displayed. Choose the one you would like to map.

Note: *Only entities set up to be mapped will be displayed in the first dropdown. If you do not see an entity you would like to map in this list, please refer to the Import Guide to see how to set up an entity to map.*

Service   Support   Education   Add-ons

The columns in the view determine what information displays when you click on a pin. To open a record that is mapped, click on the name of the record. Anything that's highlighted in blue can be clicked, and the related record will open in a new window.
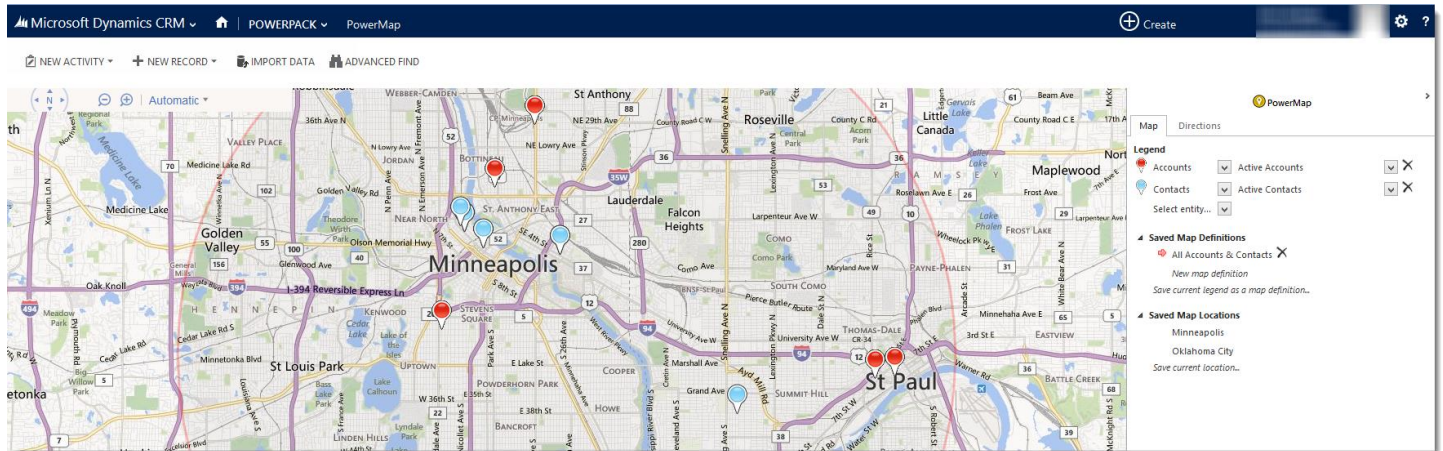
To delete a row from the legend, click on the delete symbol, to the right of the view you've selected.
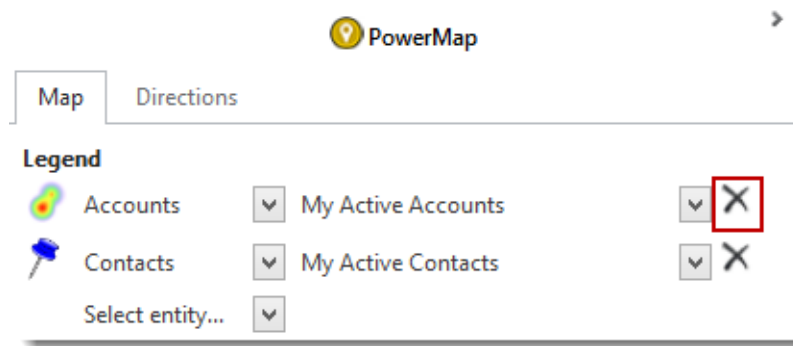

Selecting an entity in the Select Entity dropdown creates a new row in the legend. PowerMap can show any number of views from any number of entities at the same time.

Service   Support   Education   Add-ons
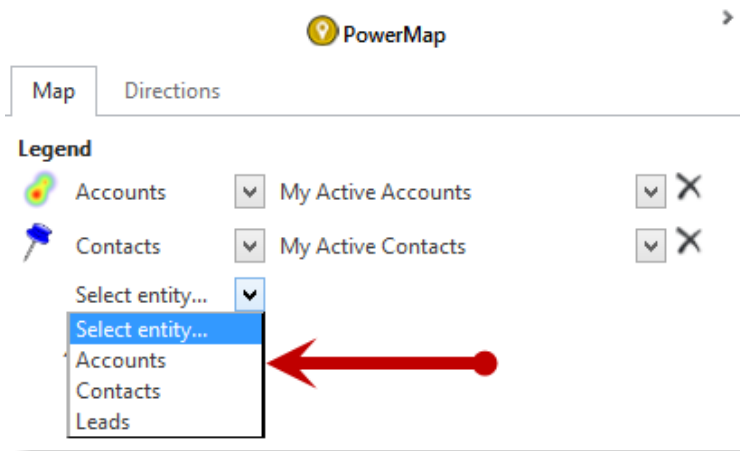
Heat Map

With PowerMap you can create a heat map based on your mapped entities. When setting up your legend and selecting a pin to represent the mapped entity, you have the option to choose a heat map.
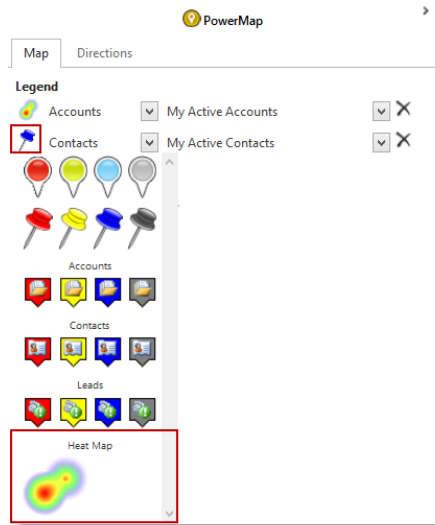
Note: *The heat map option is not available if your browser is Version 8 (an older version) of Internet Explorer*

If you select the heat map you will have additional options for the display. These can be found under "Adjust heat map options…" Once you select this link it will open a new window where you can define the color gradient, intensity and radius in miles of the heat map.

Service   Support   Education   Add-ons
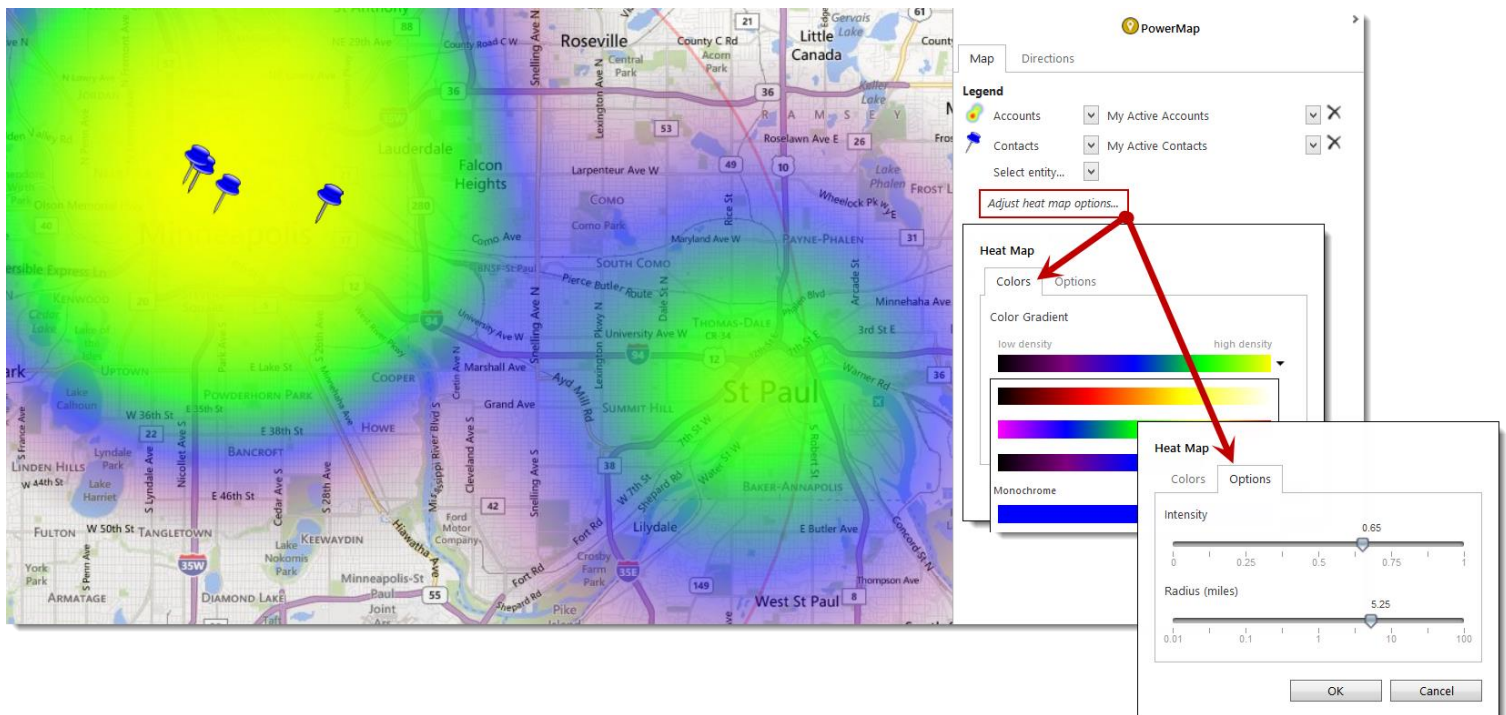
Driving Directions

If you select the 'Directions' tab on the PowerMap Control Panel you will be able select plotted points from the map or add an address to the control panel and get driving directions. To add an address from a plotted point on the map simply select the pin of your choice and select the yellow circle with an arrow in the information box or simply right click on the pin you want to add.

After you have two points specified, users will have the ability to add additional destinations, reverse the directions or clear the directions.

Once you have the points selected to map, step-by-step driving directions will be appended in the control panel. You can print the directions, view the exact distance in miles between points, view the estimated driving time, and re-route based on current traffic.

Service   Support   Education   Add-ons
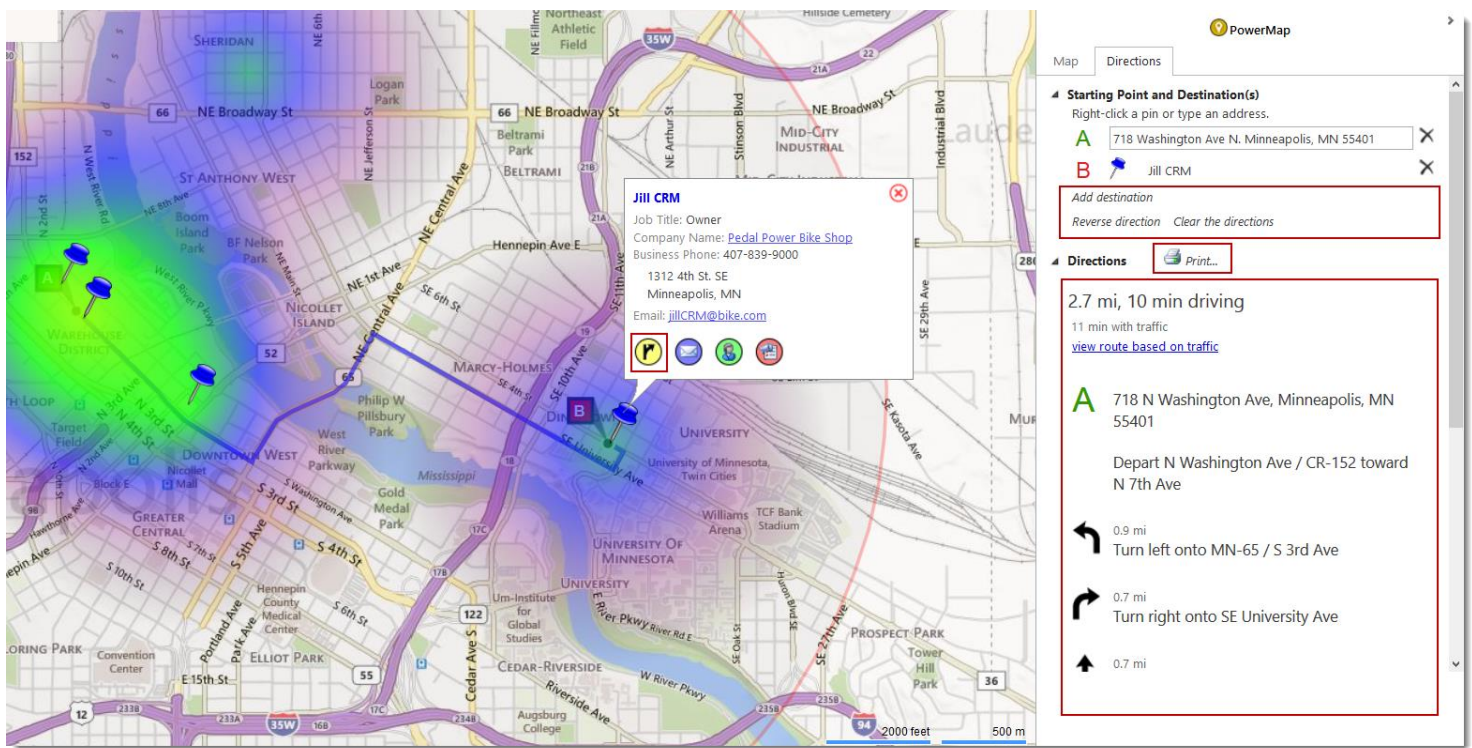
Information Box Options

Adding PowerMap points to Marketing Lists

When looking at records plotted on the map you now have the option to add specific records straight to a CRM marketing list. In the information box select the red button. This will open up a new window where you can choose to add the contact to an existing CRM Marketing list or create a new CRM marketing list to add them to.
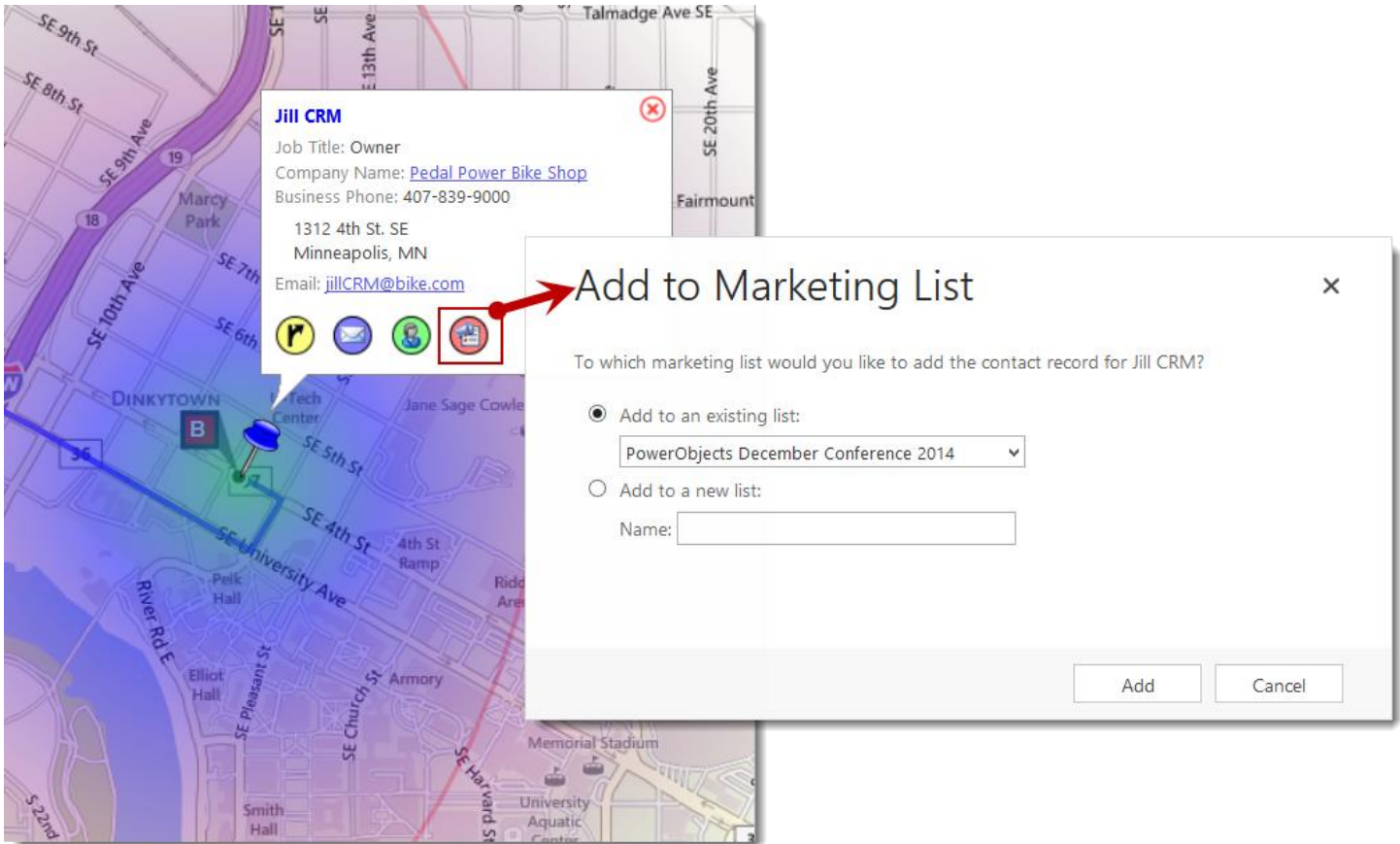
Assigning new record owners from PowerMap

Users can also assign new owners to CRM records straight from the map. Simply select a record's pin that is plotted then select the green button located in the information box. Once you select this button a new window will be opened. From this window you can select to assign the record to yourself, assign the record to another user or assign it to a team.
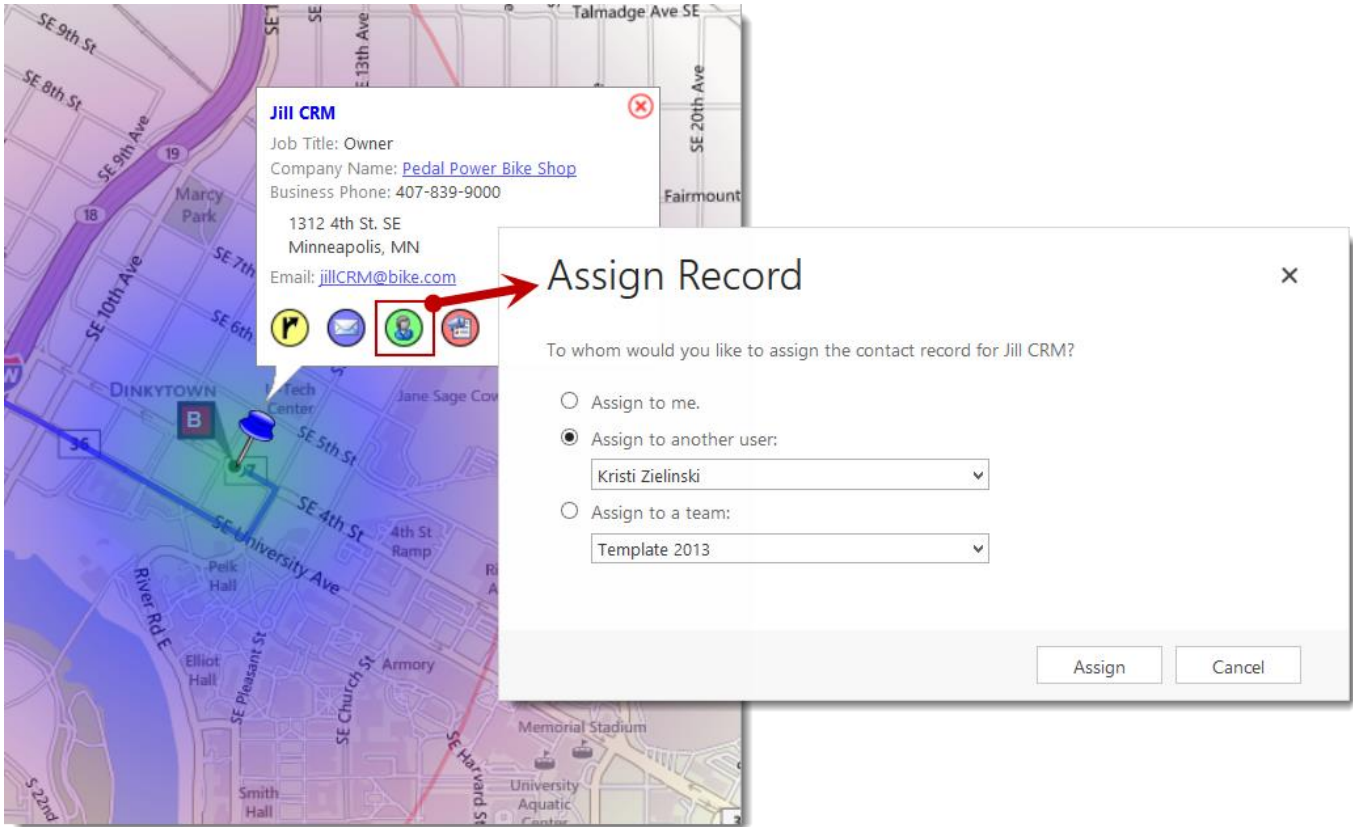
Sending emails to mapped records

Users can choose to send emails out to individuals that are mapped on the PowerMap. Simply select the blue circle and a blank email will pop open with the records email already populated.
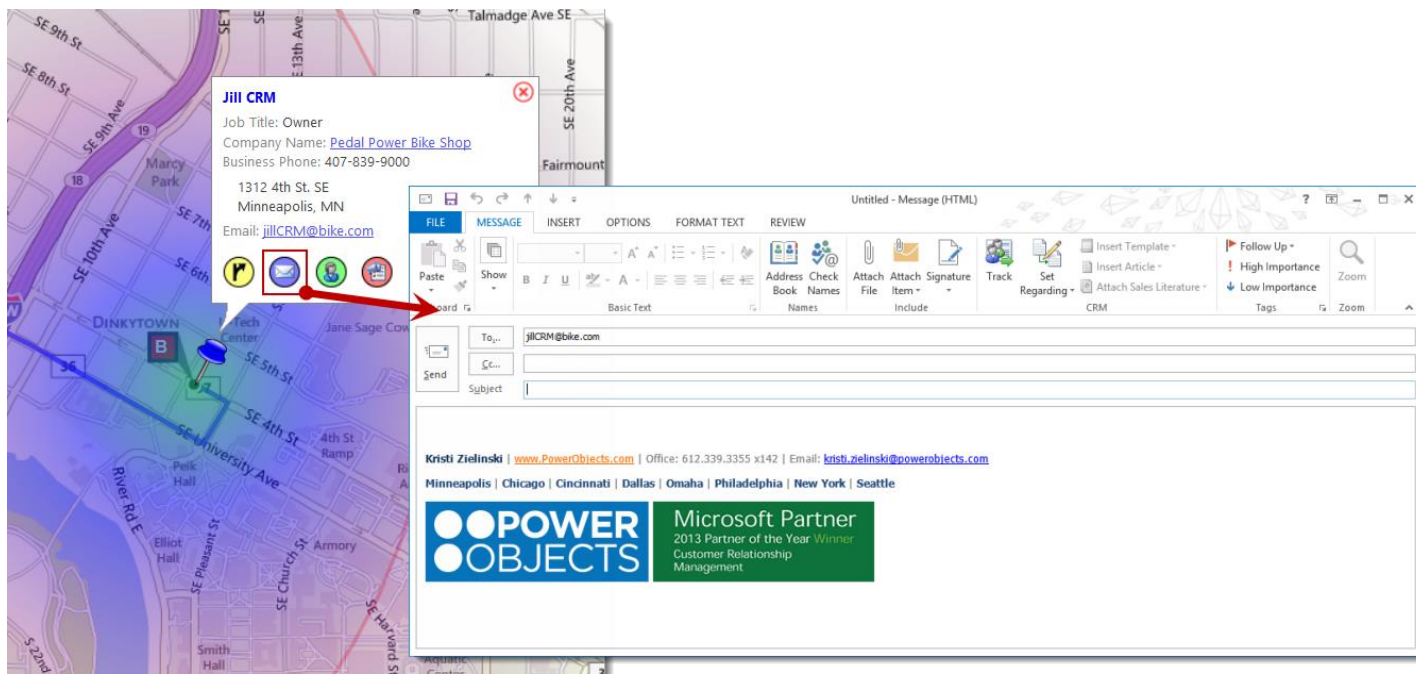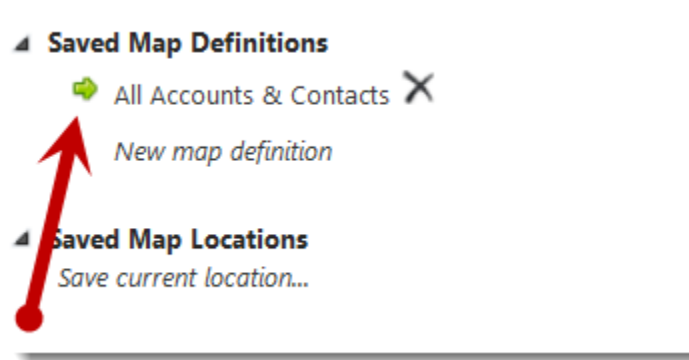

Saved Map Definitions

A saved map definition is a legend that is saved in CRM so you can reuse it later without reconstructing it each time you need it.

To save a new map definition, click the "Saved Current Legend as a Map Definition" link. In the dialog box that appears, provide a name for the map definition.

Service   Support   Education   Add-ons
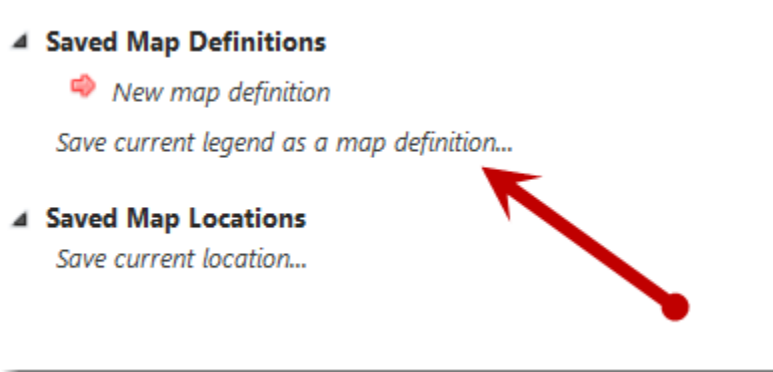
A saved map definition is available only to you; other users can save their own.

After you have saved one or more map definitions, they will appear in the list under Saved Map Definitions. Clicking the name of a saved map definition loads it as the current legend in the legend section, and displays it on the map. An arrow on the left indicates the last map definition you have selected. The arrow is green at first; it turns red if you edit the legend. In that case the map definition has unsaved changes. You can click the Save Current Legend as a Map Definition link to save the changes.


To delete a saved map definition, first select it, then click the Delete icon that appears to the right of it. Click on the New Map Definition link to clear the legend and start fresh.

Saved Map Locations

A map location tells where the map is centered and how far in or out it is zoomed. You can save map locations to return to them easily. To save a map location, first pan and zoom the map to the location you want to save. Then click the Save Current Location link. In the dialog box that appears, provide a name for the location.
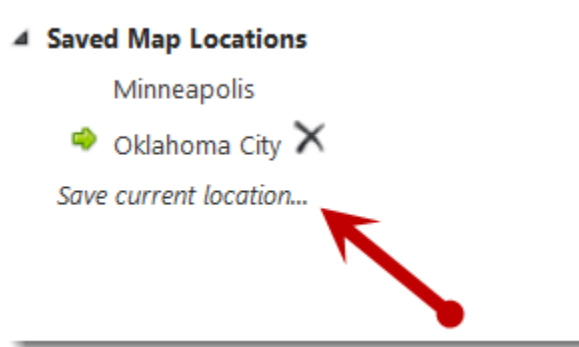
All the locations you save appear as a list. Clicking a saved location pans and zooms the map to show that location. An arrow on the left shows the currently displayed location. To delete a map location, select it, then click the Delete icon that appears for it.
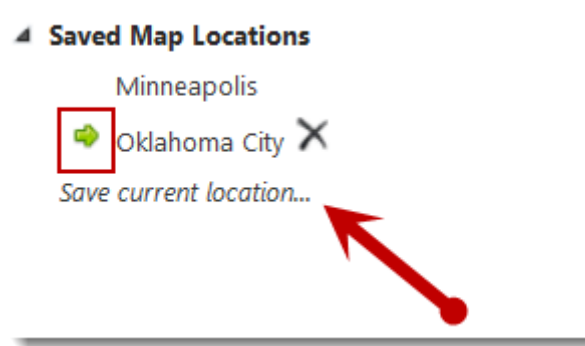

Locations you save are available only to you; other users can create their own views.

Viewing PowerMap in other Contexts

You can add the map to an entity's form or to a dashboard. You can also view the map in its own browser window.

Adding PowerMap to an Entity's Form

To add the map to the form for an entity, insert a Web resource (pomap_/Map.html). Make sure the checkbox for "Restrict cross-frame scripting" is NOT checked.
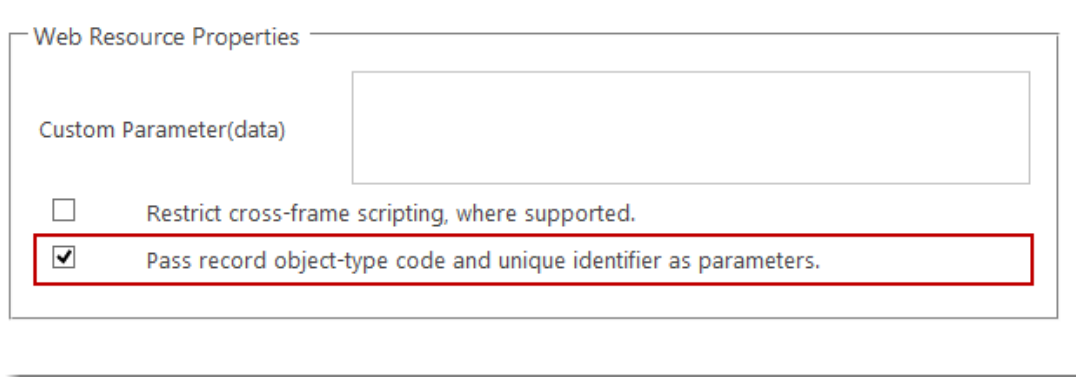
Use the other checkbox, "Pass record object-type code and unique identifier as parameters," to specify what other records you want to see on the map.

Service   Support   Education   Add-ons

Normally you will want to check this checkbox. This will cause the map to show a pin for the record you are viewing, and to focus the map in the area around that pin. The map will show other records from the default view for the entity.

If you do not check this checkbox, the map will behave as it does elsewhere, returning to the last map definition and last location that you used.


Please note that, if you would like to use the control panel to change when you're viewing a map within a record, you will want to make the map area on the record big enough so that you can see the panel and the map at the same time.

Service   Support   Education   Add-ons

Adding PowerMap to a Dashboard

Adding the map to a dashboard is similar. Add a web resource to the dashboard and link it to the resource called pomap_/Map.html. Again, make sure the checkbox for "Restrict cross-frame scripting" is NOT checked. The map will now operate as it would if you were accessing it through the PowerPack area of your CRM.
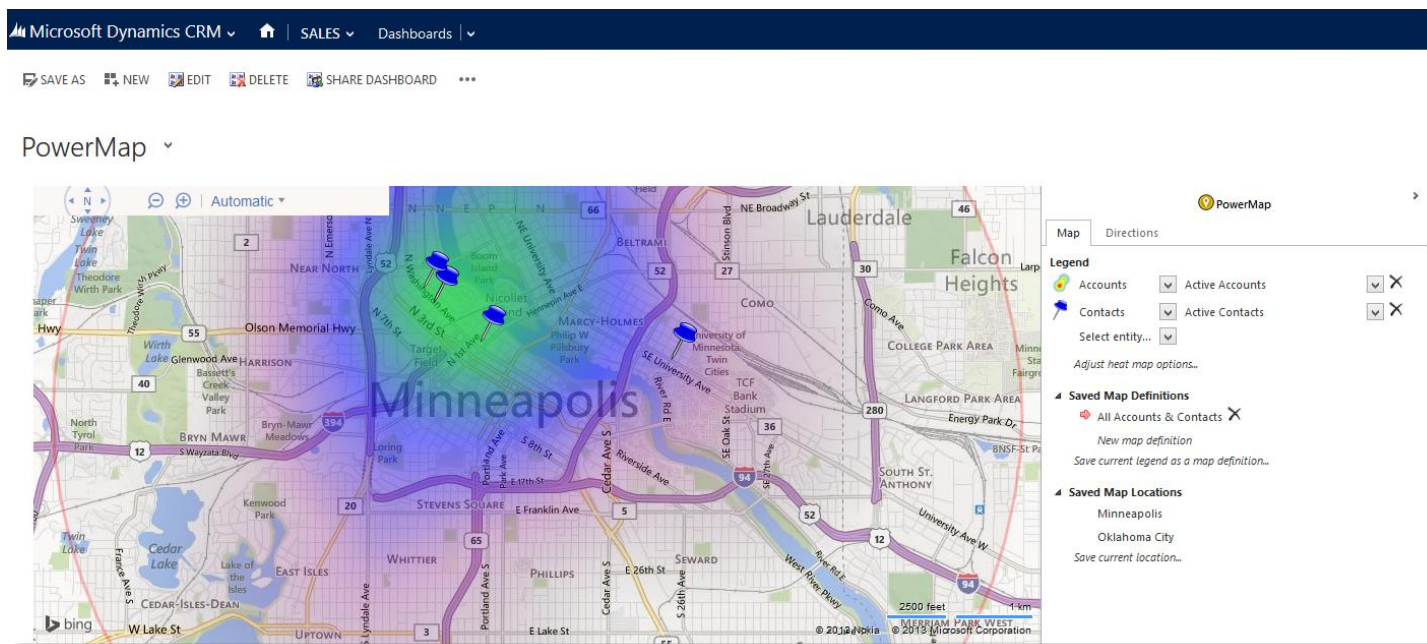
Viewing PowerMap in a Browser Window

To open the map directly in its own browser window, go to this URL:

<url for CRM>/WebResources/pomap_/map.html

The user must be a CRM user. He or she will be prompted to log in (if not already logged in). **Note:** *If you have a CRM on premise, you will not be able to access the map outside of the office, unless you have IFD enabled and ADFS set up.*

Thanks for your interest in PowerMap. Should you have any questions, contact us at 612-339-3355 or email powerpackpro@powerobjects.com. Remember, your trial will expire 30 days from the date of import. If you are interested in subscribing, go back to the configuration screen and change "try" to "subscribe" and enter your credit card information – you will be charged $2/CRM user/month.

Interested in more CRM tips and tricks? Check out blog or subscribe to our newsletter.

Service   Support   Education   Add-ons