POWER
OBJECTS

PowerGeoLog

CRM 2013 | 2015 | 2016

Service   Support   Education   Add-ons

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Configuring PowerGeoLog

Once PowerGeoLog has been imported and registered, select the Setup tab to adjust the settings, and press Save. PowerGeoLog will attempt to start creating logs right away, it is important to configure PowerGeoLog as soon as the solution is deployed to your organization.
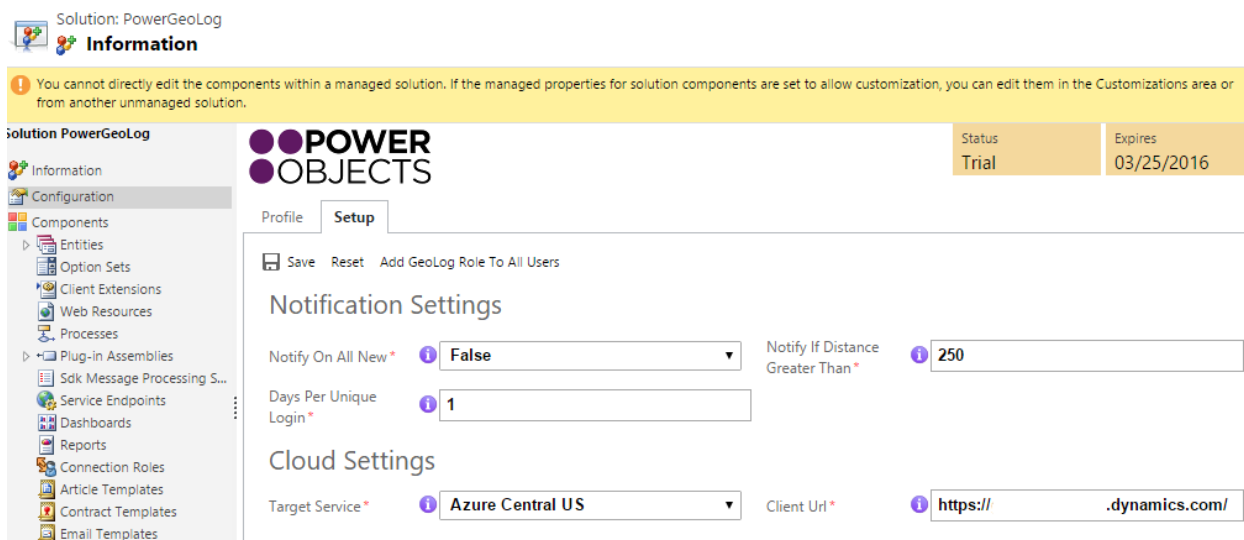
Notify On All New: Set this option to true if you would like PowerGeoLog to notify users of a login from any new IP address to their CRM account.

Notify If Distance Greater Than: This option is the threshold for notification in miles. PowerGeoLog will compare new logins with the user's most recent login.

Days Per Unique Login: By default PowerGeoLog will create login records once per an IP Address per day. If you would like to reduce the amount of duplicate logs being created you can increase this value.

Target Service: PowerGeoLog uses Azure cloud service to geo code IP addresses, select the location closest to where the majority of your users will be logging in from.

Client URL: This should be the base URL of your CRM organization, unless you have a unique configuration of CRM you should be able to leave this as is.

Security Role

For ease of setup we have provided a button on the setup tab which will give all CRM users the PowerGeoLog User role. PowerGeoLog will only track user logins if the security role has been assigned to them.
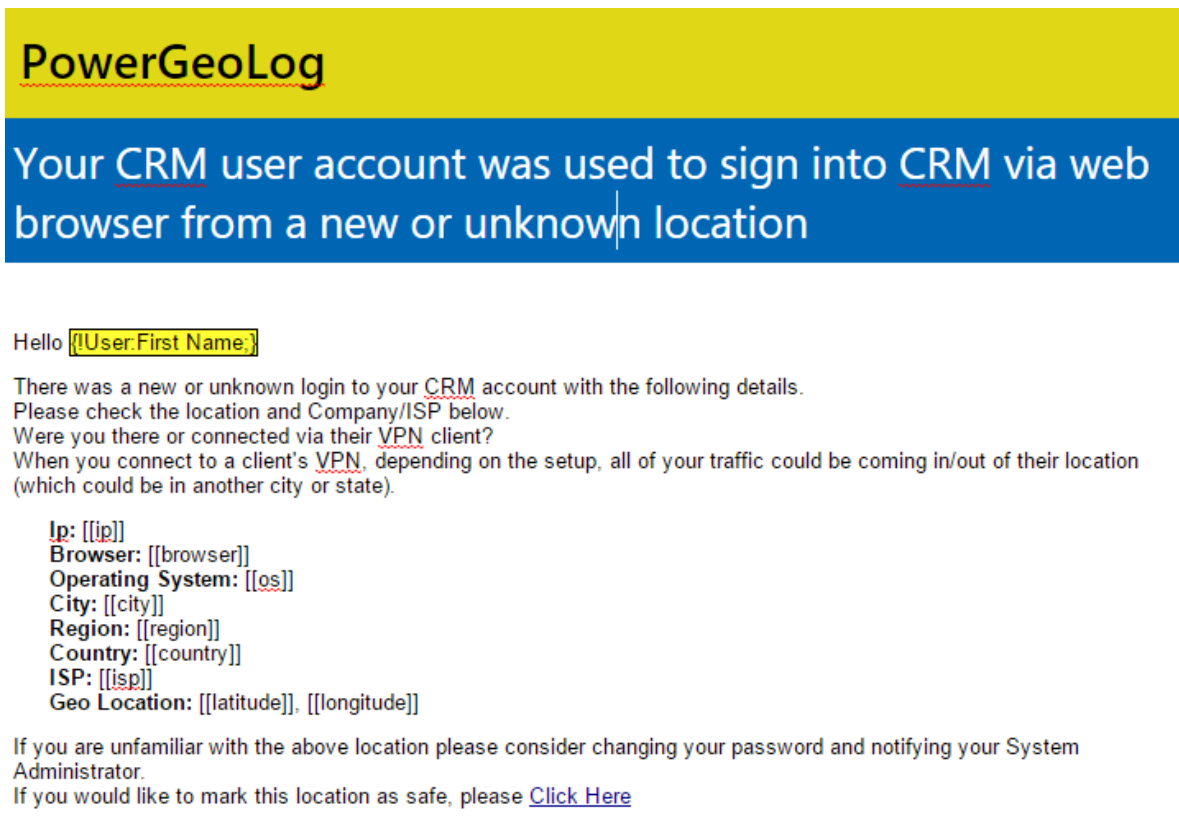
Configuring the Notification Email

PowerGeoLog includes a CRM Email Template which is used to create the notification email. This template includes a variety of custom parameters to display login data in the email.

To customize the notification email navigate to Settings > Templates and select Email Templates.
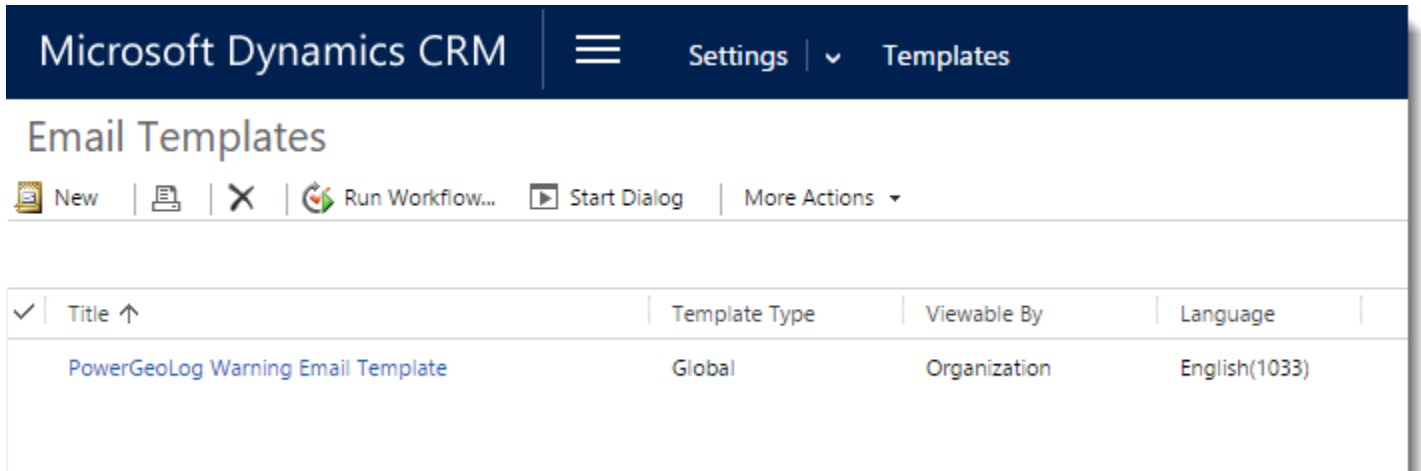
Open the template named "PowerGeoLog Warning Email Template"

Modifying this template will change the notification email which users receive. PowerGeoLog includes the following custom parameters which will be replaced on creation of the notification email.

[[ip]]: The IP address used to sign into CRM.
[[browser]]: The web browser used to sign into CRM.
[[os]]: The operating system used to sign into CRM.
[[city]]: The city location of the IP address.
[[region]]: The region or state of the IP address.
[[country]]: The country of the IP address.
[[isp]]: The ISP or Organization who owns the IP address.
[[latitude]]: The latitude of the IP address.
[[longitude]]: The longitude of the IP address.
[[whitelistlink]]: The URL of the resource used to mark the Geo Log as safe.
**[[date:w]]:** Short date login occurred. e.g. February 25, 2016
[[date:n]]: Numerical date login occurred. e.g. 02/25/16
[[time]]: The time login occurred in UTC/GMT time zone e.g. 2:42 pm (UTC/GMT)

Note: Custom parameters must include the surrounding double brackets and are case sensitive (all lower case).

PowerGeoLog provides the capability to mark Geo Log records as safe using a web resource. If you would like to include a link to the resource in your email template use the following steps.

1) Type the text you would like to use for your link in the email template editor.
2) Highlight the text and press "Ctrl+K" on your keyboard (Make sure you are using Internet Explorer).
3) In the URL field type or paste **[[whitelistlink]]** and press "OK".
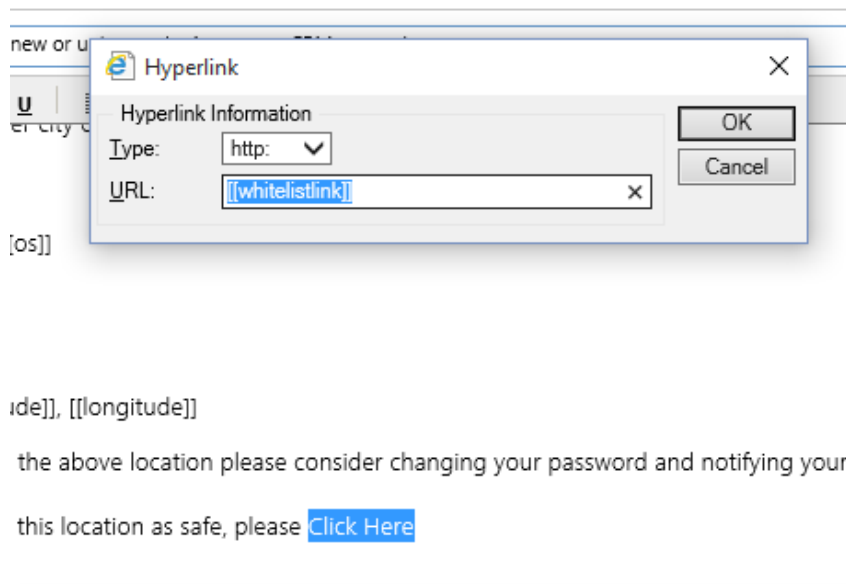
Configuring the PowerGeoLog Map

PowerGeoLog includes a map application which will display on a map the locations CRM users are logging in from. In order to use this map you will need a Bing Maps API Key. You can request a free API Key from Microsoft at https://www.bingmapsportal.com/.

The Bing Maps API Key can be set in two different ways.

Option 1 (On Premise):

1) Navigate to Settings > Administration > System Settings
2) In the General tab, locate the Enable Bing Maps section
3) Enter your API key and select OK

Option 2 (On Premises and CRM Online):

1) Navigate to PowerPack > Geo Log Map
2) Click on the settings icon
3) Choose "Set Bing Maps API Key"
4) Enter your key and press "Save"

PowerMap

PowerMap users can view logins in PowerMap by adding Geo Log in the Entities to Map.

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