Dynamica

LABS

DYNAMICA GOOGLE MAPS INTEGRATION

User Guide

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3 OVERVIEW

Google Maps is the most popular mapping service. It is useful to be able to not only display the location of your contacts, accounts, leads, and opportunities on a Google map, but also configure your filters directly on the map, and save them in the system.

Dynamic Google Maps is a functional Google map integration solution that makes it easy to display coordinates on a Google map.

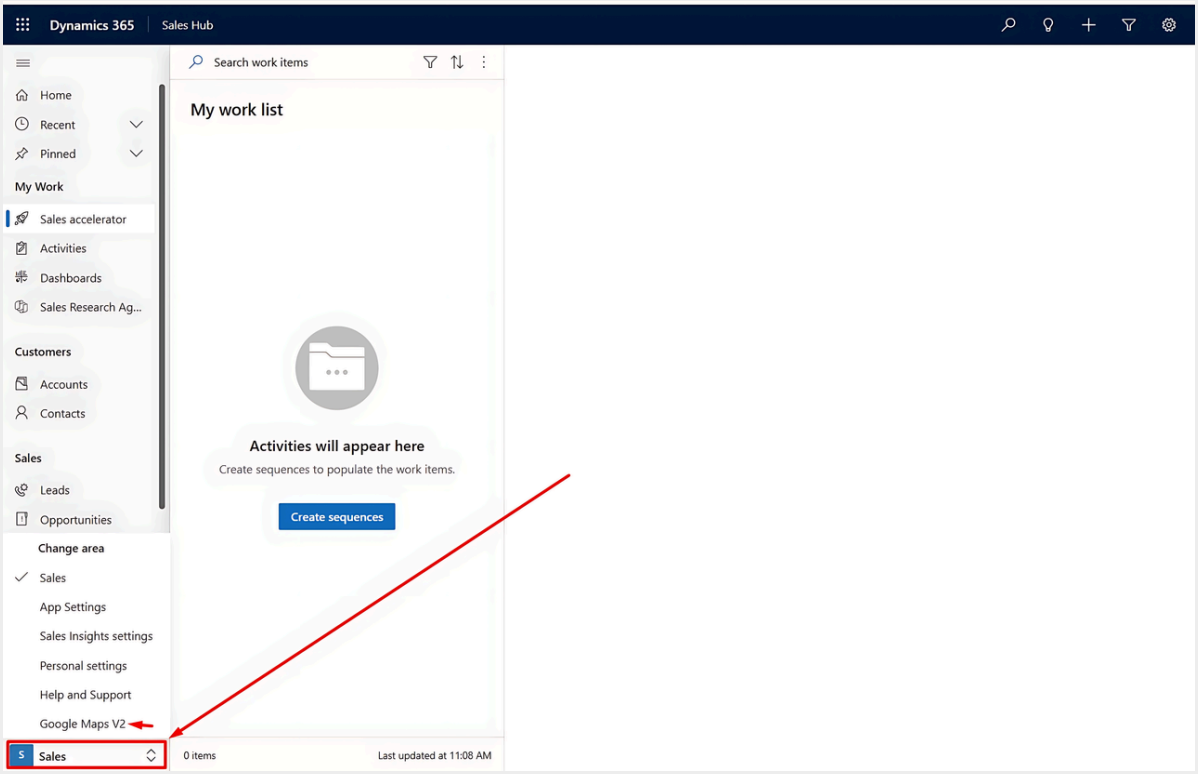
Google Maps are available in the menu on the new area named Google Maps Integration V2.

In this solution, you can work with all OOB entities, as well as with custom entities. You can filter entities by system and custom views, and, also by location on the map.

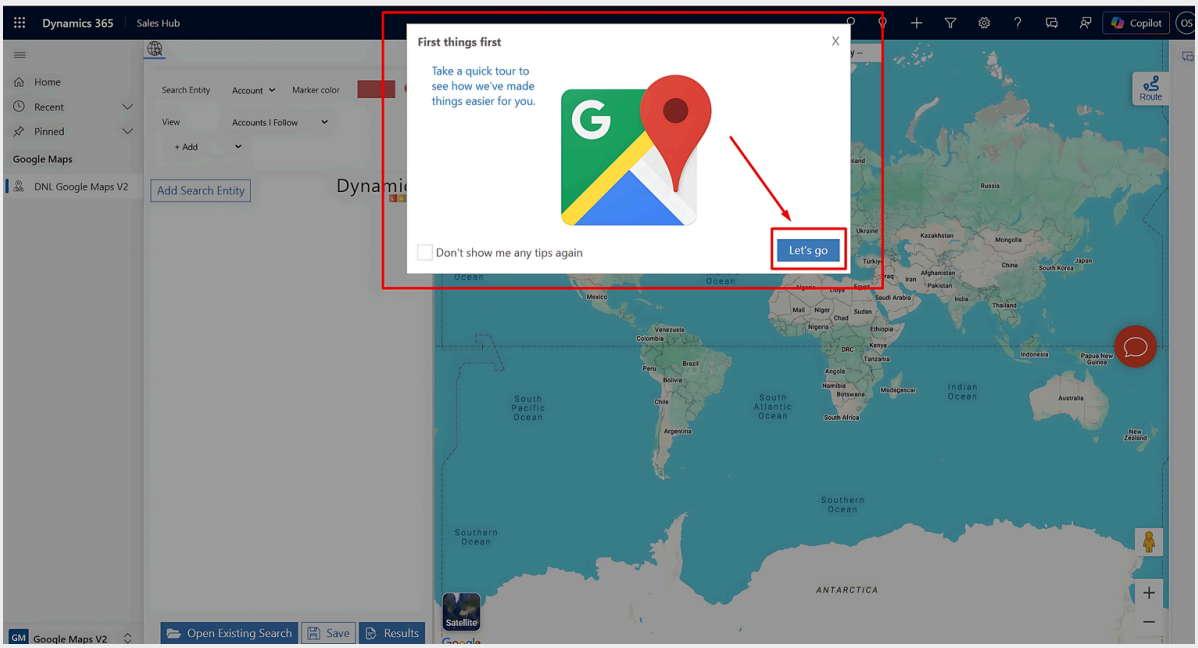
GOOGLE MAPS SEARCH PARAMETERS

After Dynamica Google Maps Integration appication is installed and configured, open the application you work in and make next steps:

1. Change the area to the Google Maps V2. Click the Google Maps V2.



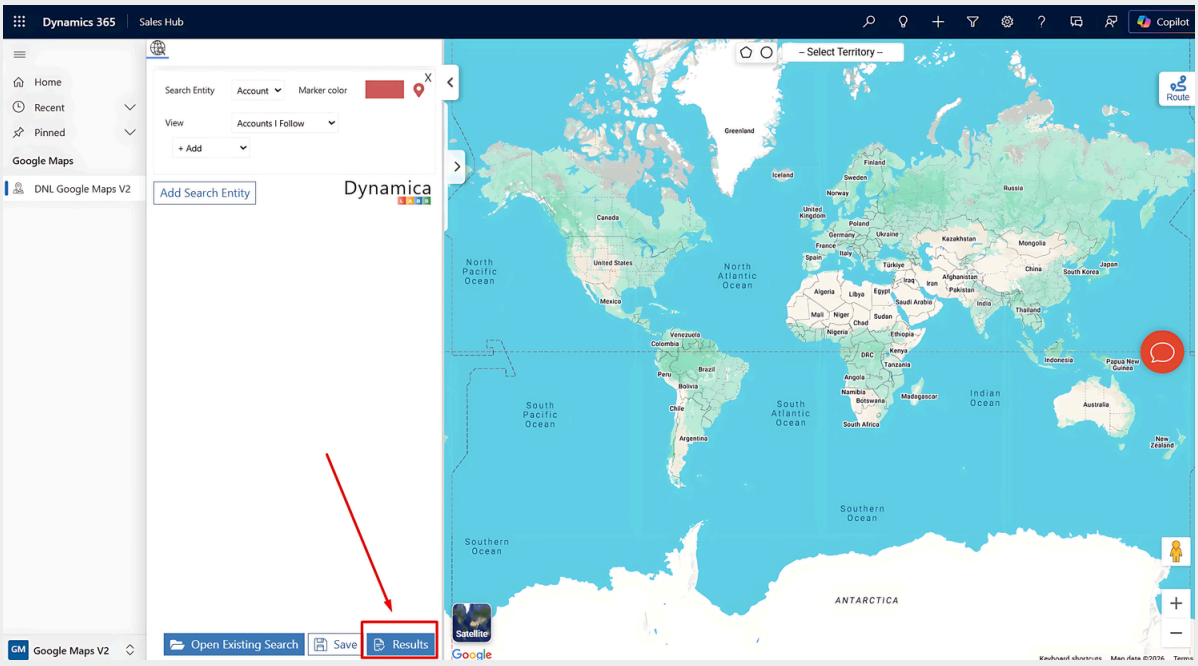
Take a quick tour to see how it works (optional)

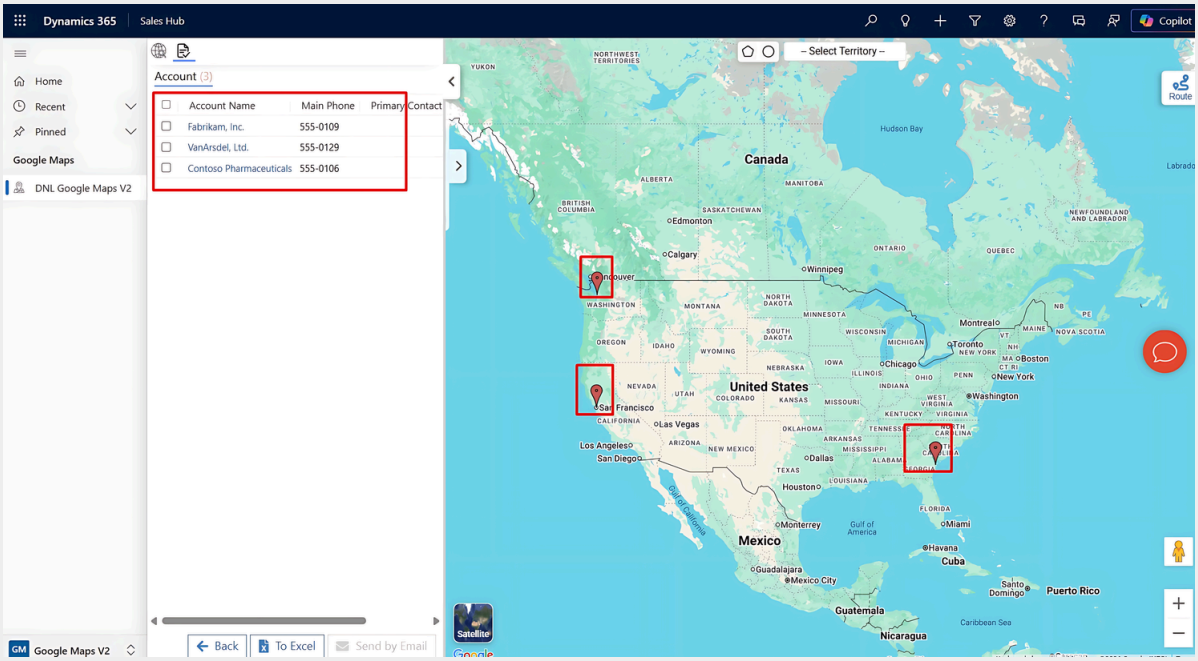


GOOGLE MAPS SEARCH PARAMETERS

2. Navigate to Search Parameters.

Here it is possible to see Search Entity that was set up as default during configuration.
Click the Results button to view records on the map.



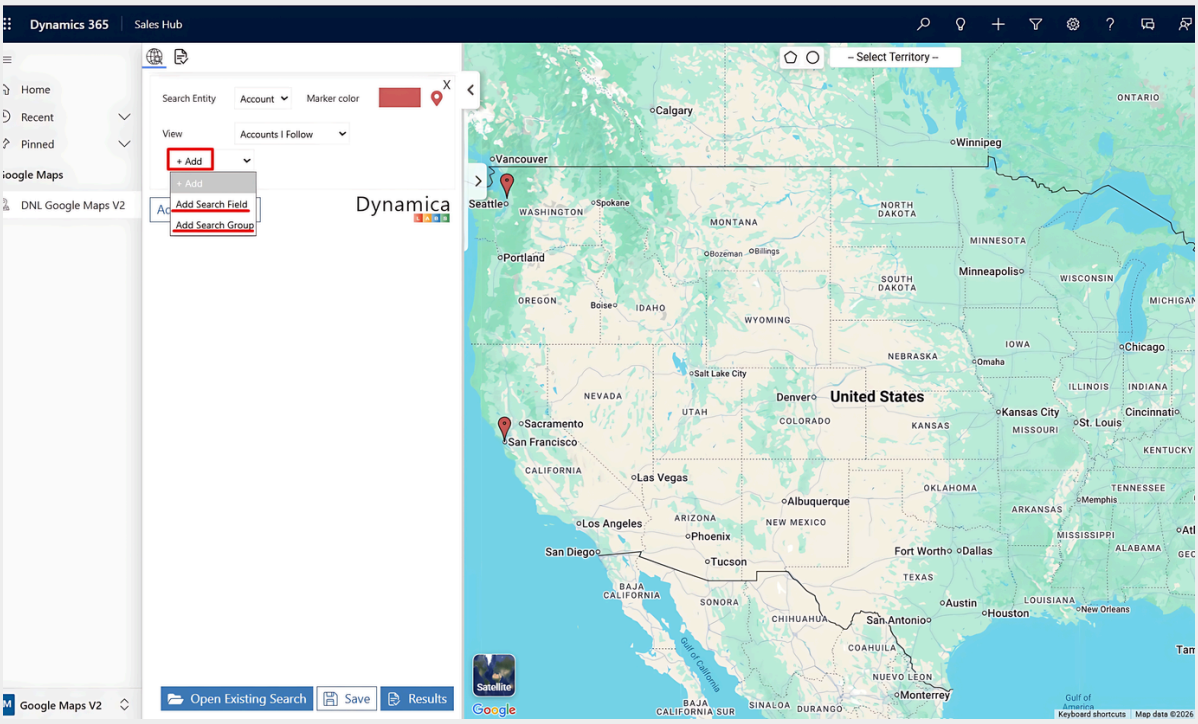


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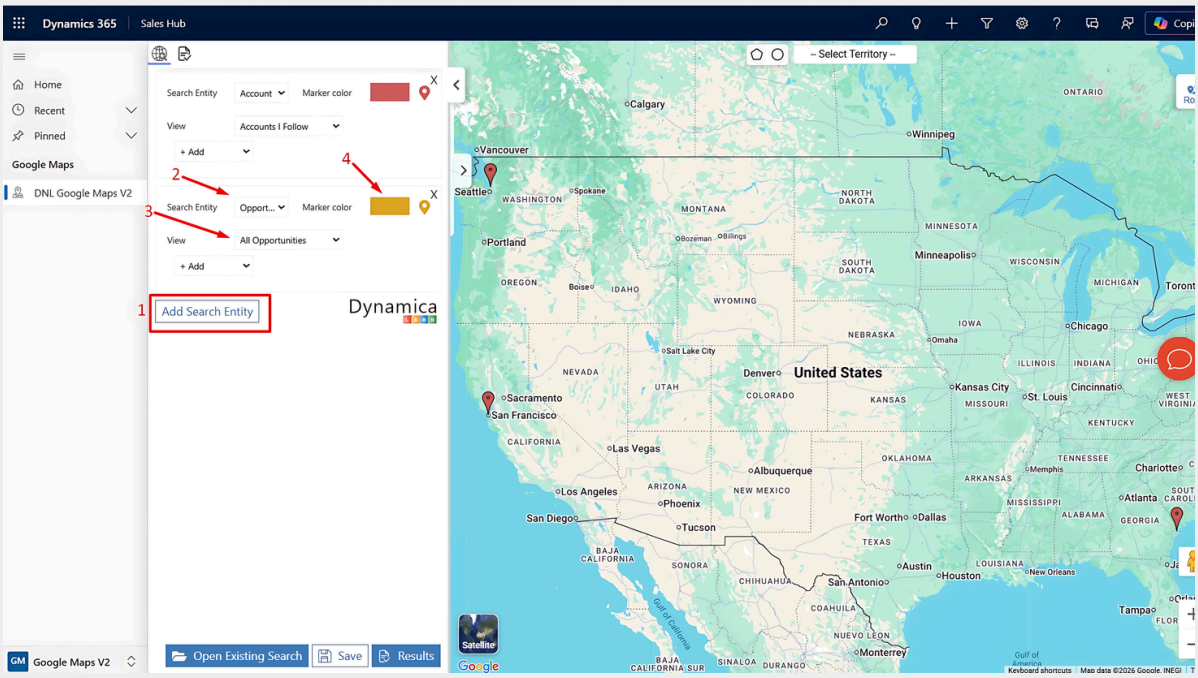
GOOGLE MAPS SEARCH PARAMETERS

3. Search results can be refined by adding custom criteria:
- Click + Add in the search panel.

Select a filter type:
- Add Search Field: Adds a specific field condition to filter records.
- Add Search Group: Combines multiple conditions using logical operators



4. Add the new Search Entity using the Add Search Entity button.

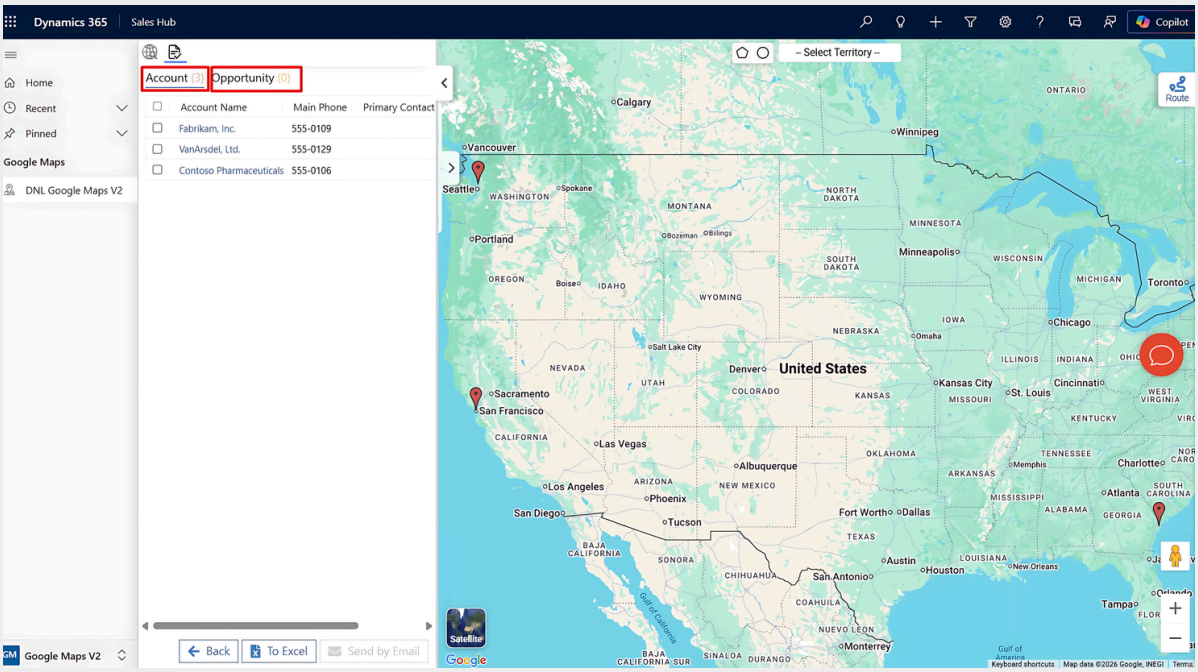


GOOGLE MAPS SEARCH PARAMETERS

5. After completing Search Parameters, click Results button

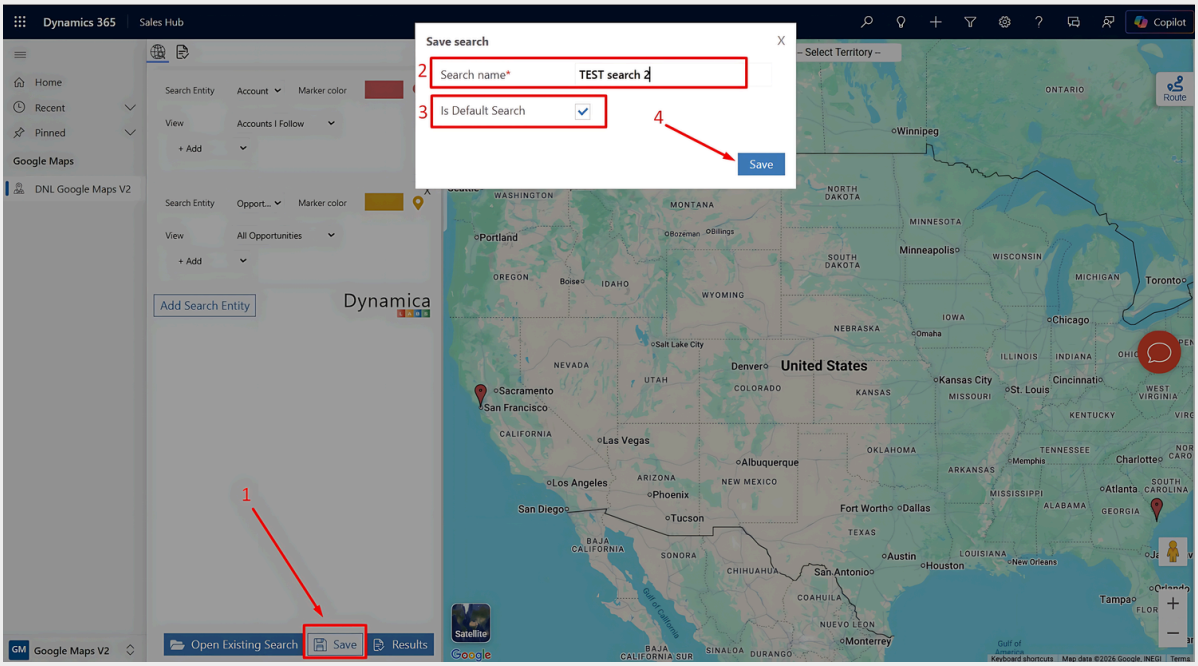
The search output display opens:

- Entity tabs: If multiple entities were selected in the search configuration, a separate tab is created for each entity
- Record count: The total number of retrieved records is indicated in parentheses next to the entity name



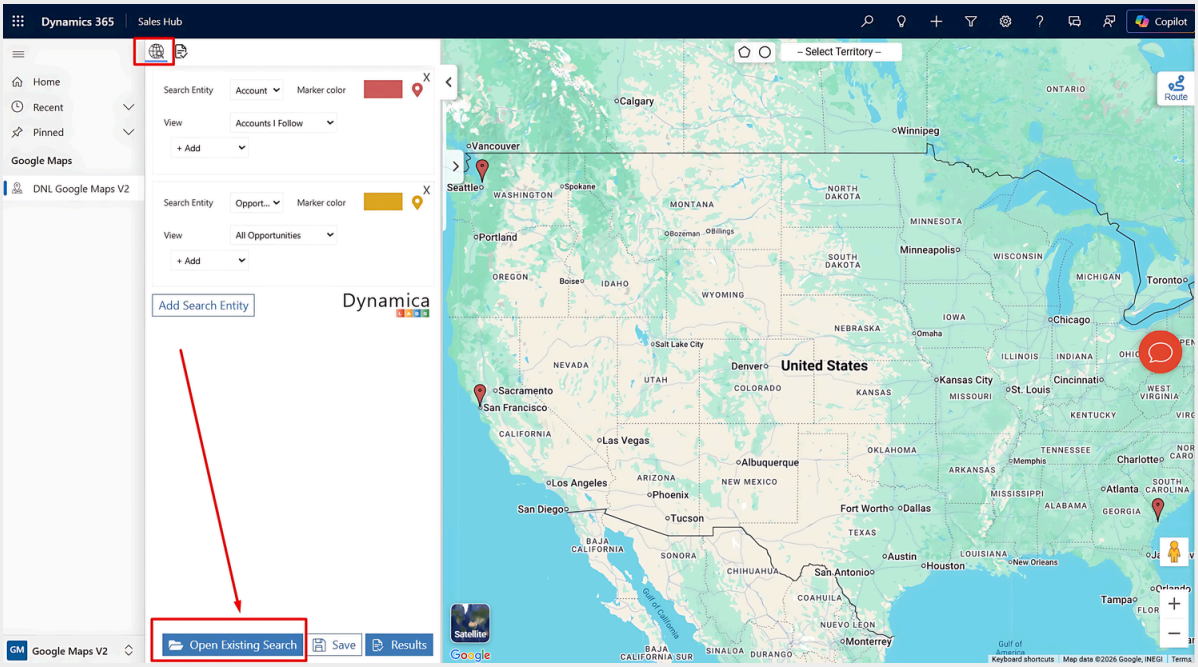
SAVE THE NEW SEARCH

1. After completing Search Parameters, click Save.
2. Type the new name in the modal window. Select Is Default Search if needed.
3. Click the Save button.

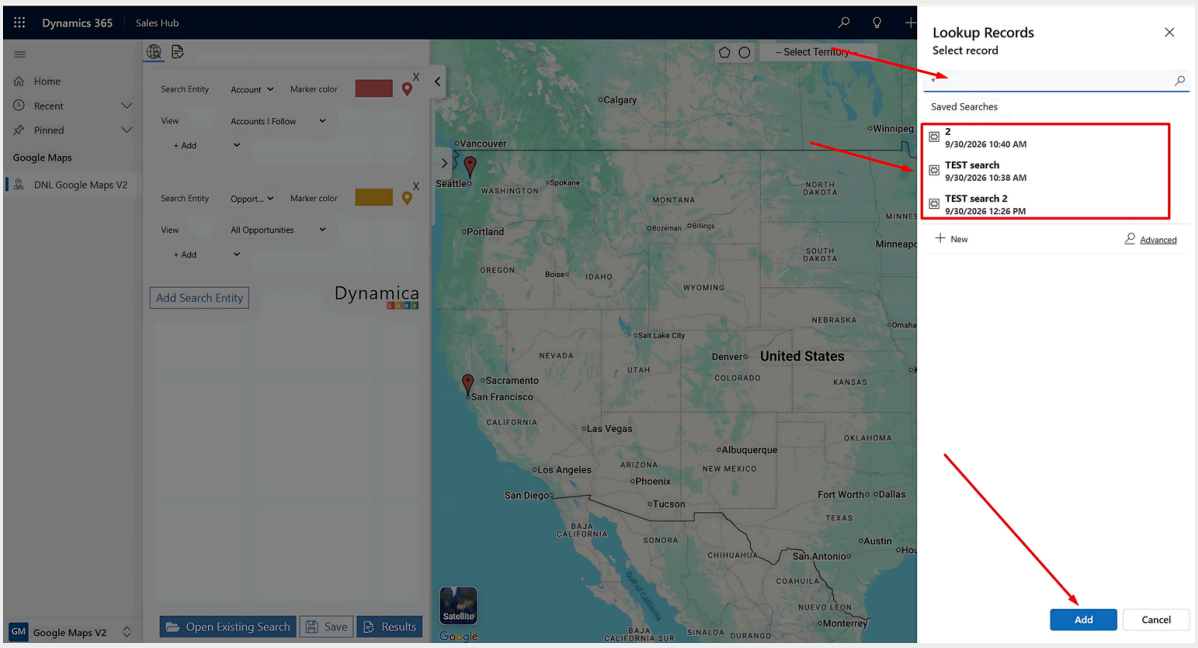


OPEN EXISTING SEARCH

1. Open Search Parameters tab.
2. Click to the Open Existing Search button.



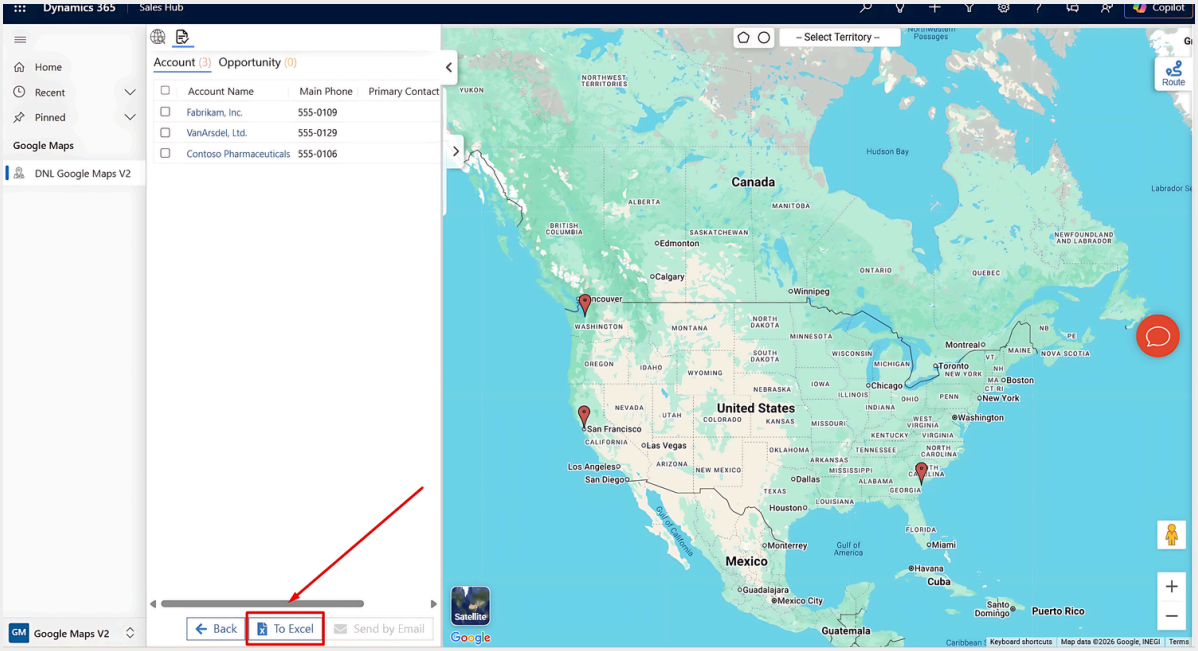
3. In the window on the right enter the name to search or press Enter to browse.
4. Select the Saved Search from the list.
5. Click to Add button.



GOOGLE MAPS RESULTS.EXPORT TO EXCEL

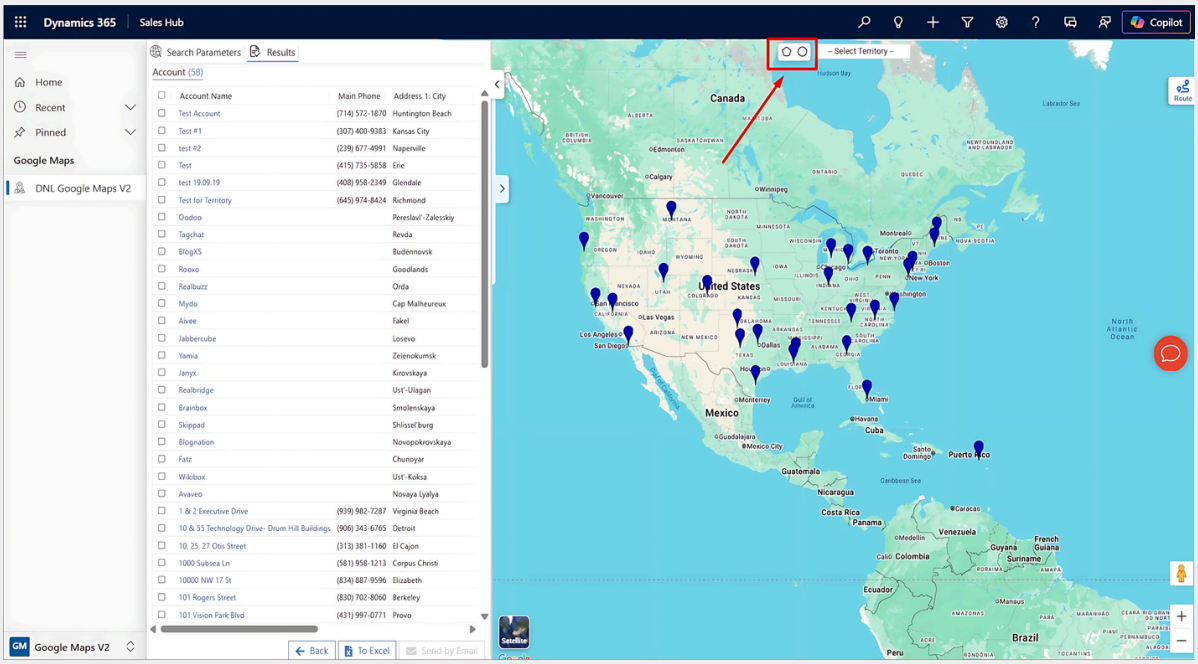
On the left side, tabs containing lists of the searched entities are displayed.
On the right side, the coordinates of the search entities from the selected views are shown on the map using markers with their corresponding colors.

To export the results grid to Excel, the To Excel button should be clicked.

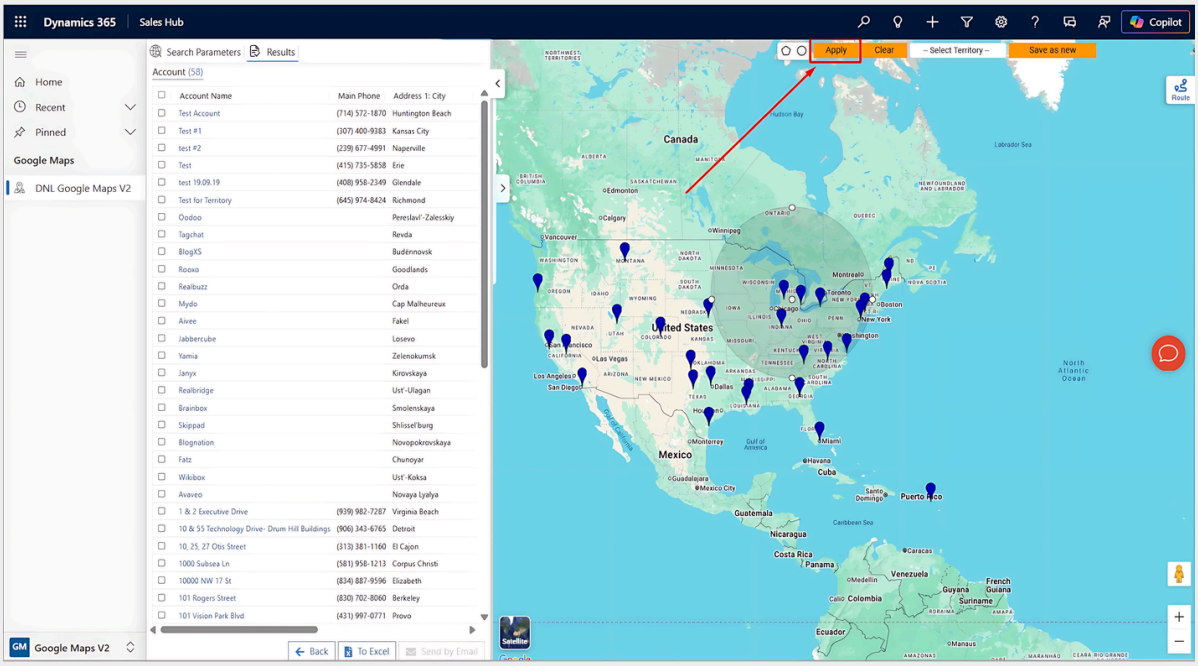


11 FILTER THE RESULTS ON THE MAP

To filter markers on the map use one of the buttons on the top of the map:

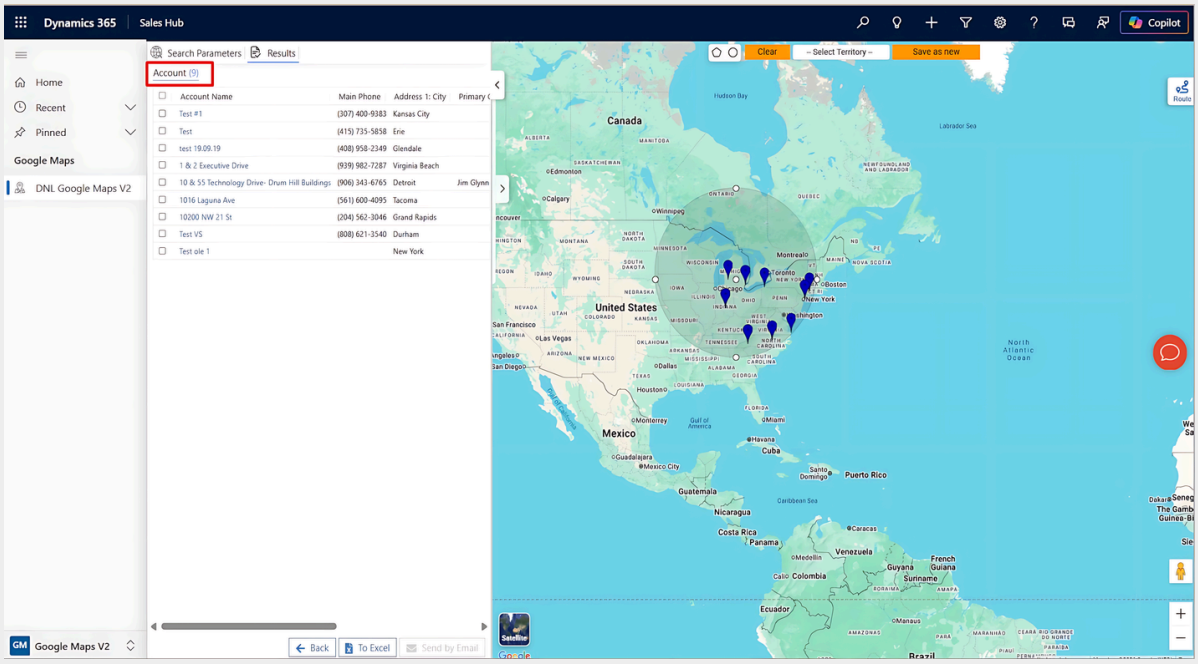


1. Click on the button with a circle or polygon
2. Draw a circle on the map and click on Apply button.



3. Review the result.

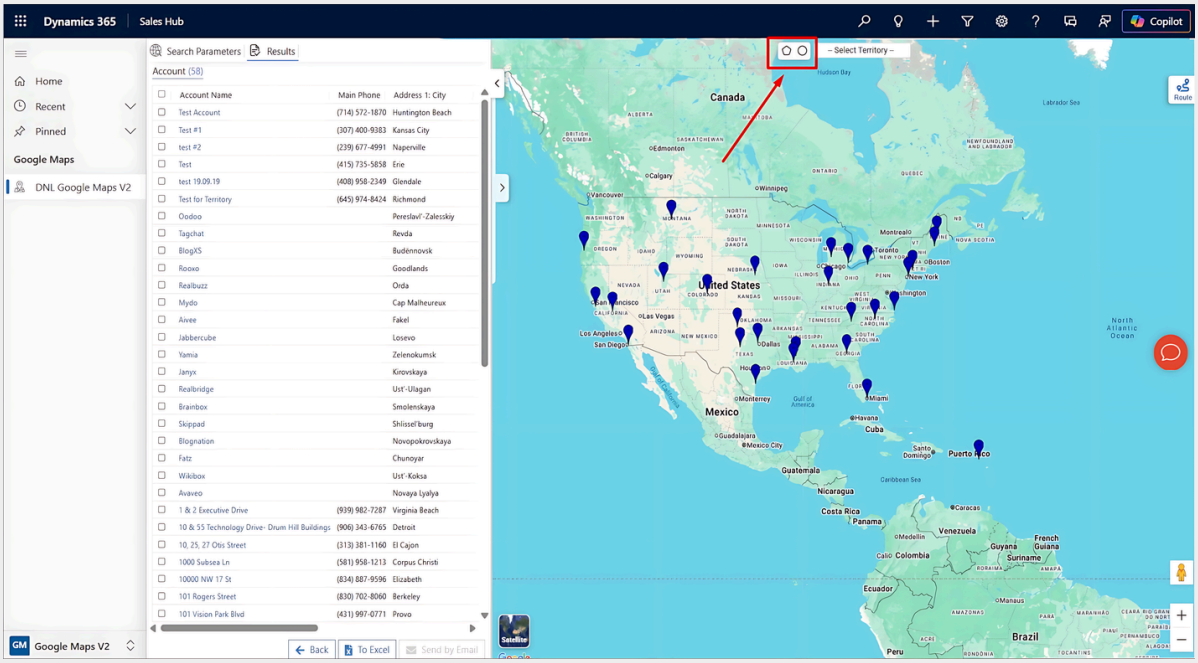
FILTER THE RESULTS ON THE MAP



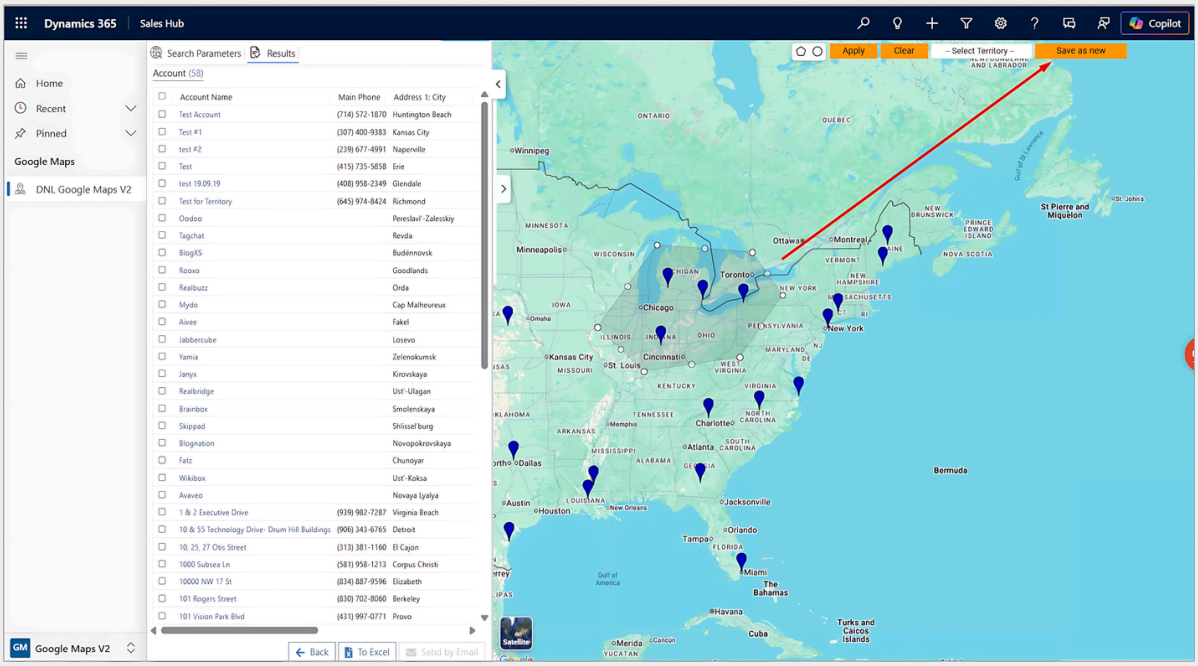
Clicking Clear button removes the filter and restores the full list of search results.

SAVING THE NEW TERRITORY

To save the new territory, at first create this territory using one of the buttons on the top of the map:

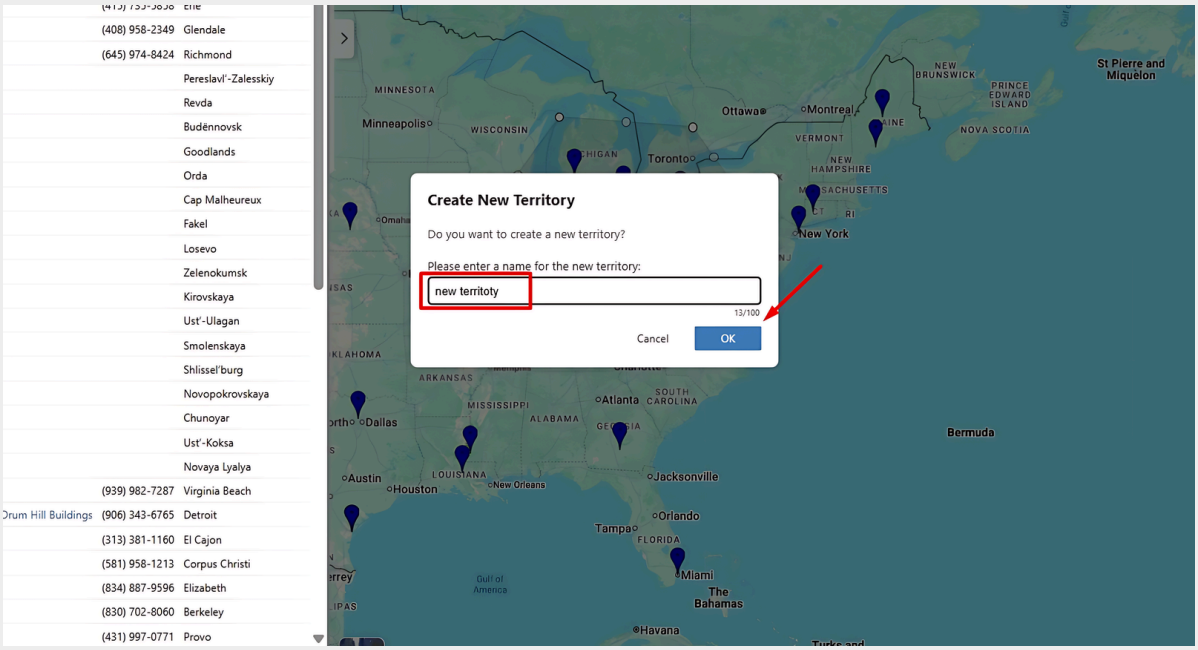


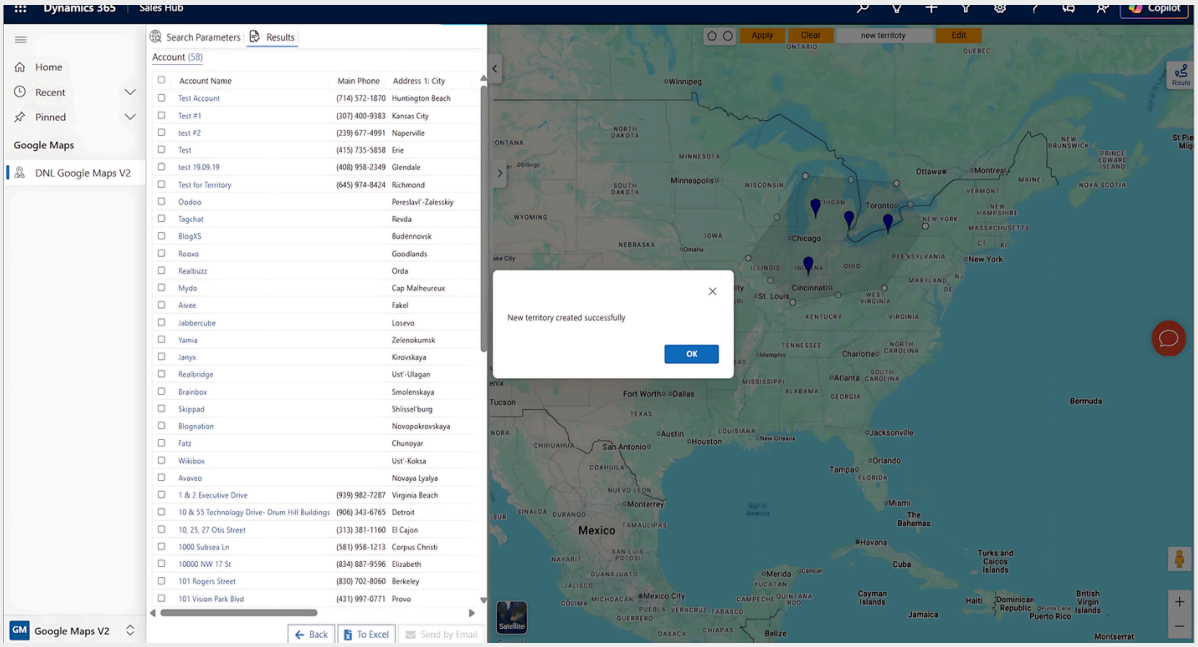
1. Click on the button with a circle or polygon
2. Draw a circle on the map and click on Save as new button.



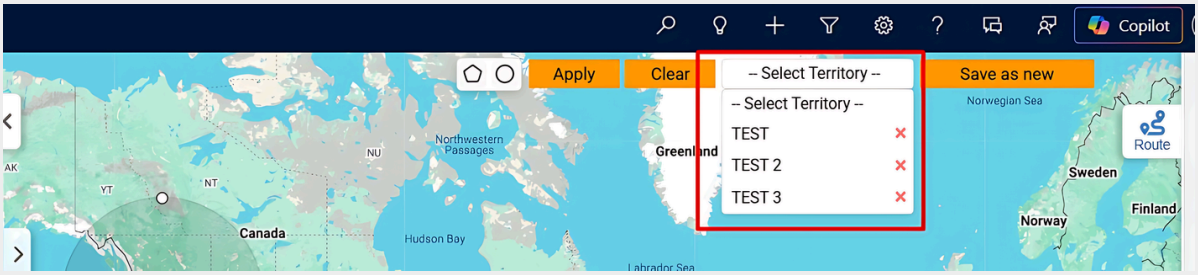
SAVING THE NEW TERRITORY

3. In the Create New Territory pop-up window, enter a name into the Territory Name field and click Ok





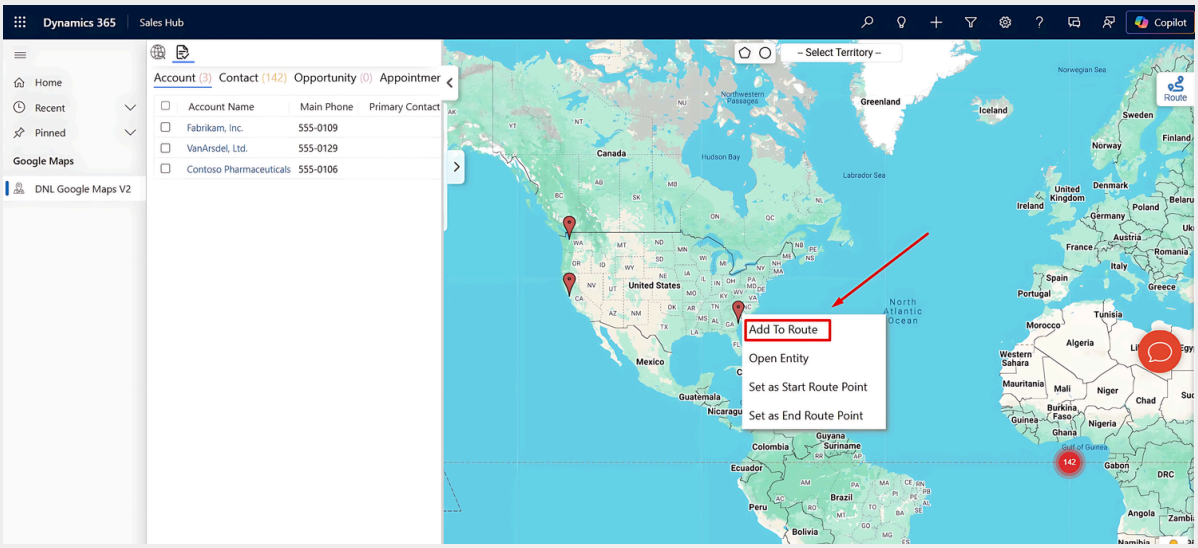
To choose existing territory, click Select territory



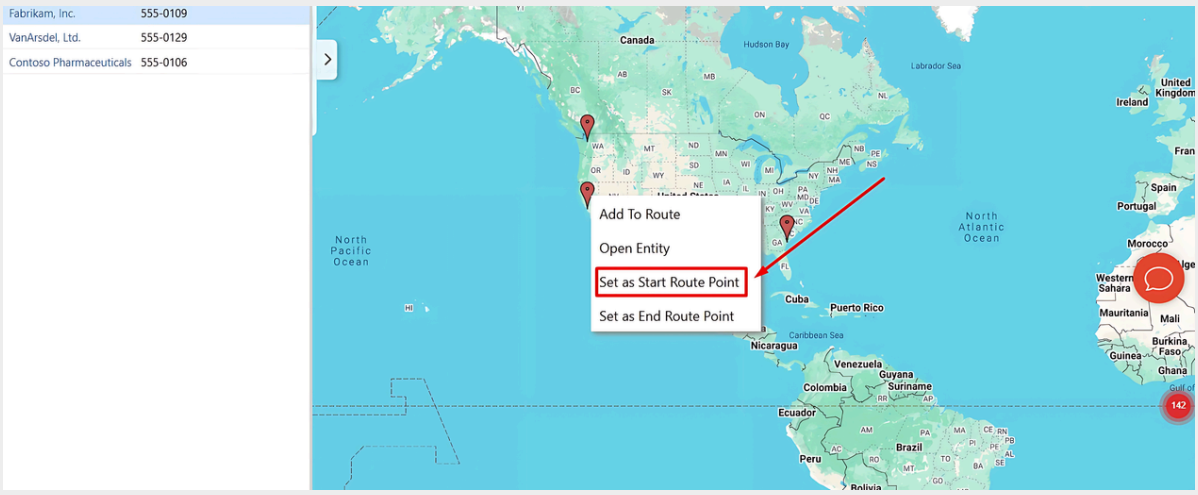
BUILD A ROUTE ON A MAP

After receiving the results, building a Route is possible

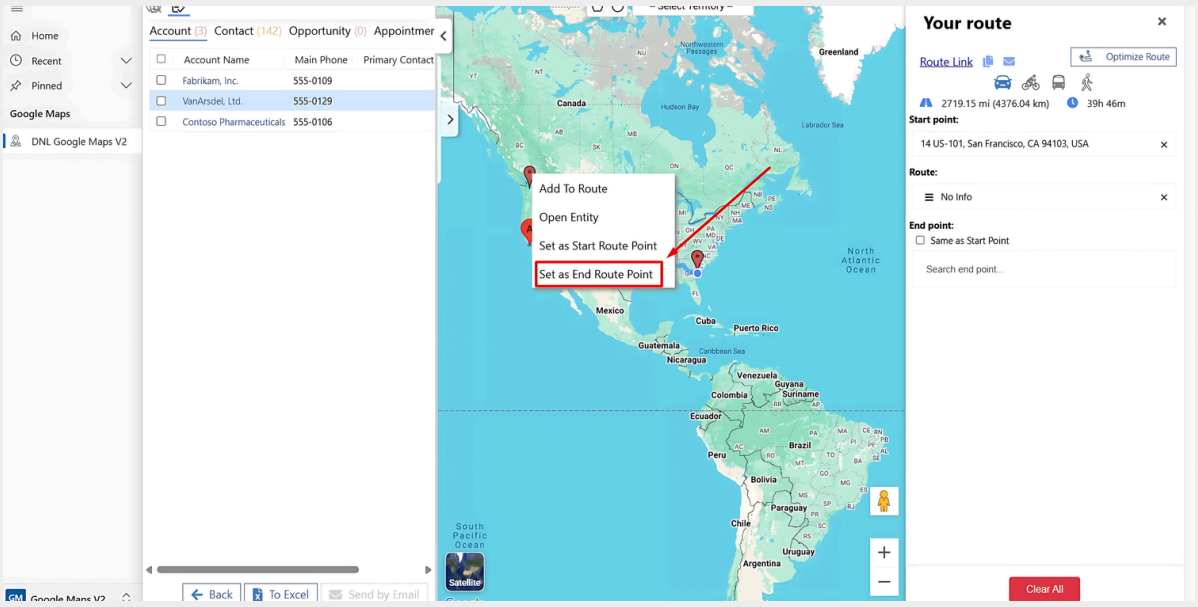
1. Right-click on the markers on the map. Select Add to Route.



2. Select the first point for your route by clicking “Set as Start Route Point”.

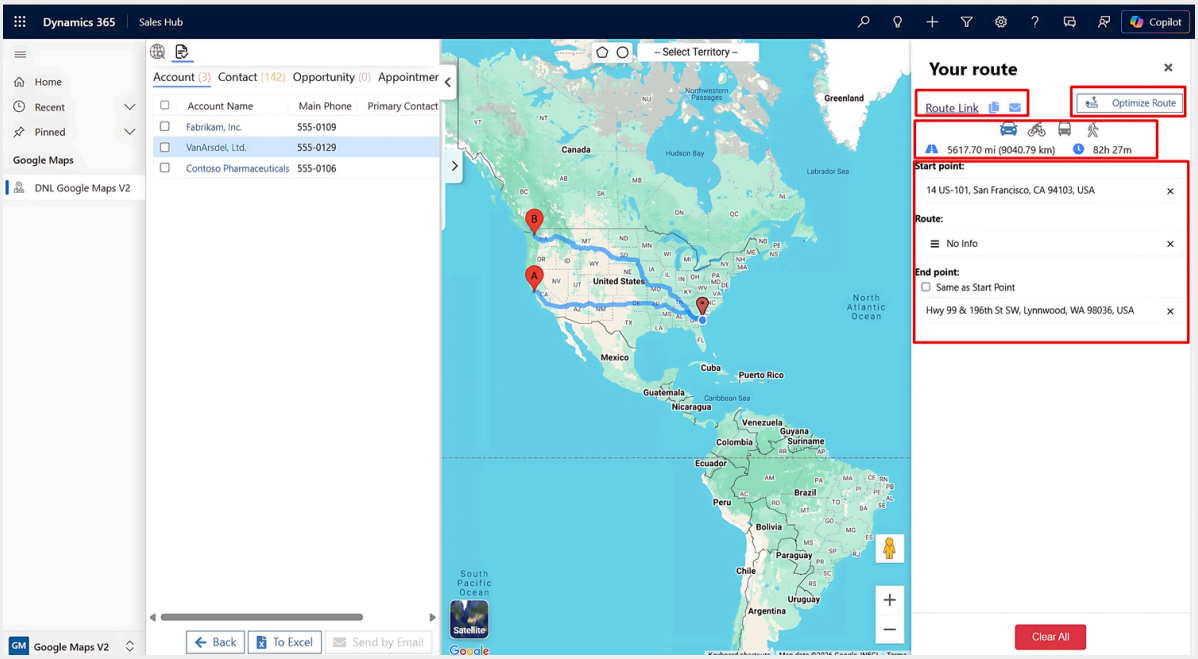


3. Select the last point for your route by clicking “Set as End Route Point”.



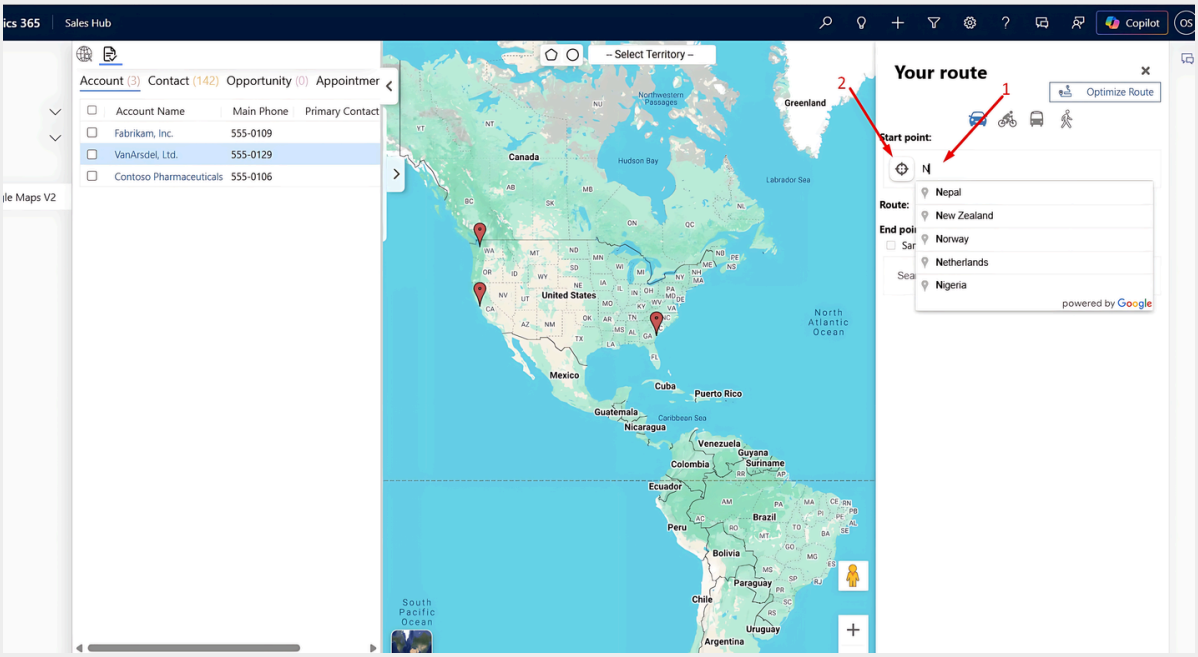
BUILD A ROUTE ON A MAP

4. The panel that appears on the right contains the coordinates of the added points and buttons for copying a link or opening the route directly in Google Maps and sending links to this route via email. Distance and estimated time are automatically updated when switching between travel modes. If multiple points are included in a route, clicking Optimize Route automatically rearranges the stops for the optimal travel sequence.



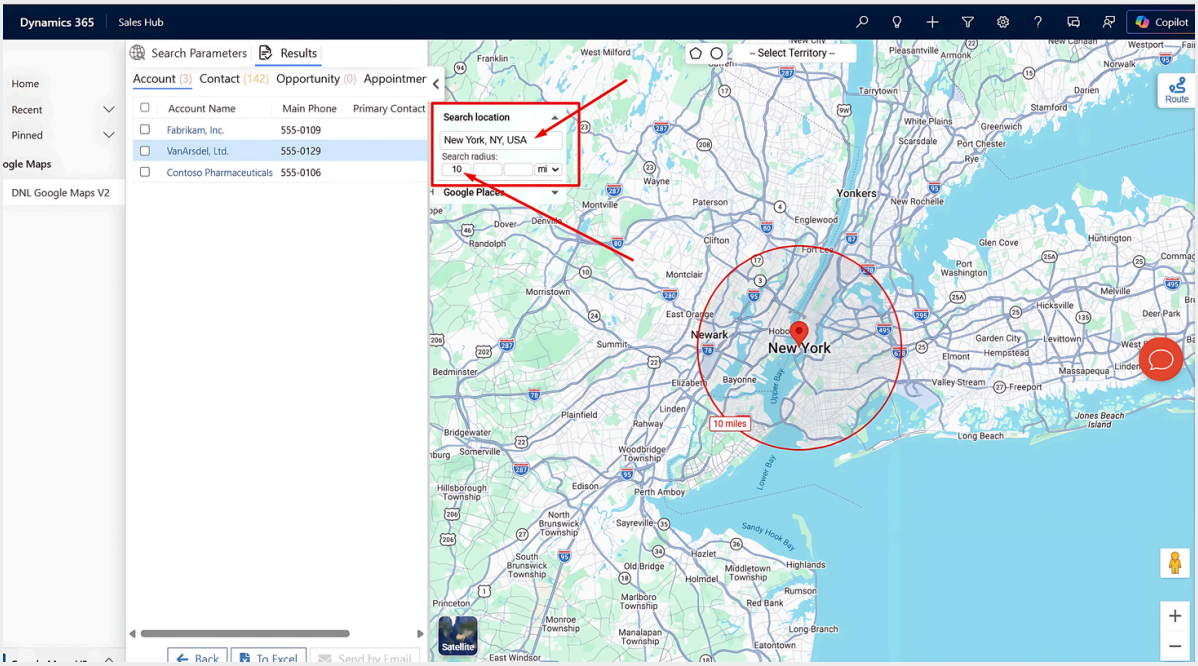
BUILD A ROUTE ON A MAP

Starting points are not limited to manual map selection; flexible location entry options are provided within the route panel. A starting location can be specified manually by entering an address or place name directly into the Search start point... field (1). Alternatively, clicking the target icon (Use my current location) leverages the device's built-in GPS geolocation to automatically set the current physical location as the route origin, simplifying navigation setup (2).



SEARCH LOCATION

The Search Location feature allows users to search for places by address or name, making it easy to locate points of interest. Additionally, users can enable a radius of any size around a point of interest to visually understand the number of objects within that area.



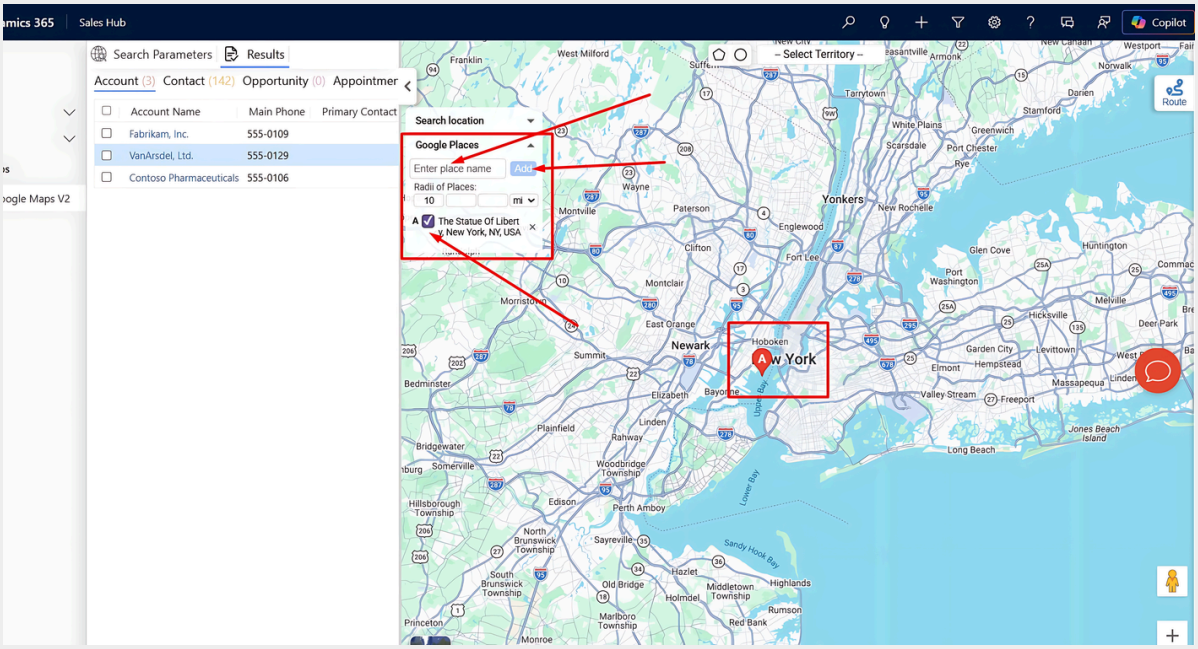
GOOGLE PLACES SEARCH

The Google Places search panel allows searching for points of interest directly on the map and applying specific actions from the location card

To find the google place make next steps:

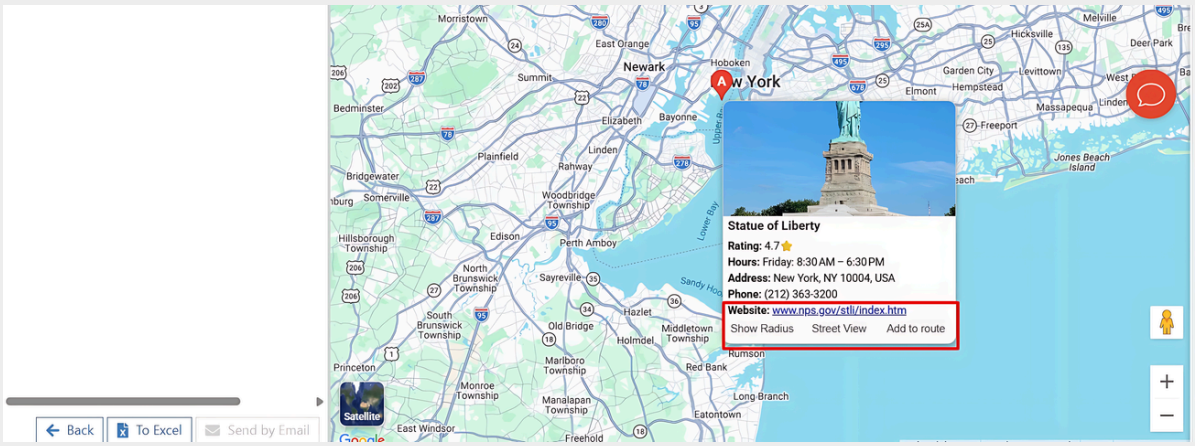
1. Start typing the location name in the Enter place name field to display dynamic suggestions,
2. Select the appropriate result from the list, and click Add.

The selected location is added to the list below with a corresponding letter marker- mark chckbox and review the result.



Left-clicking a place marker on the map opens an information card with location details and quick actions:

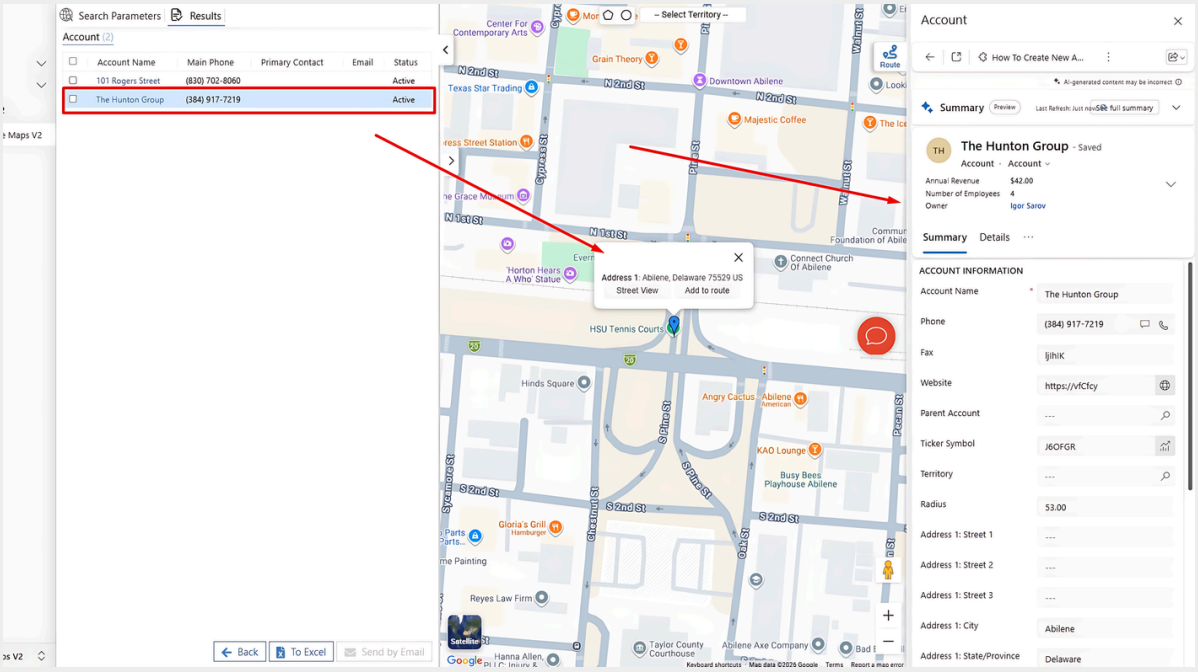
- Website Link: Opens the official website in a new tab.
- Show Radius: Displays the designated radial boundary around the location.
- Street View: Launches an interactive ground-level view.
- Add to Route: Adds the location as a waypoint in the active route panel.



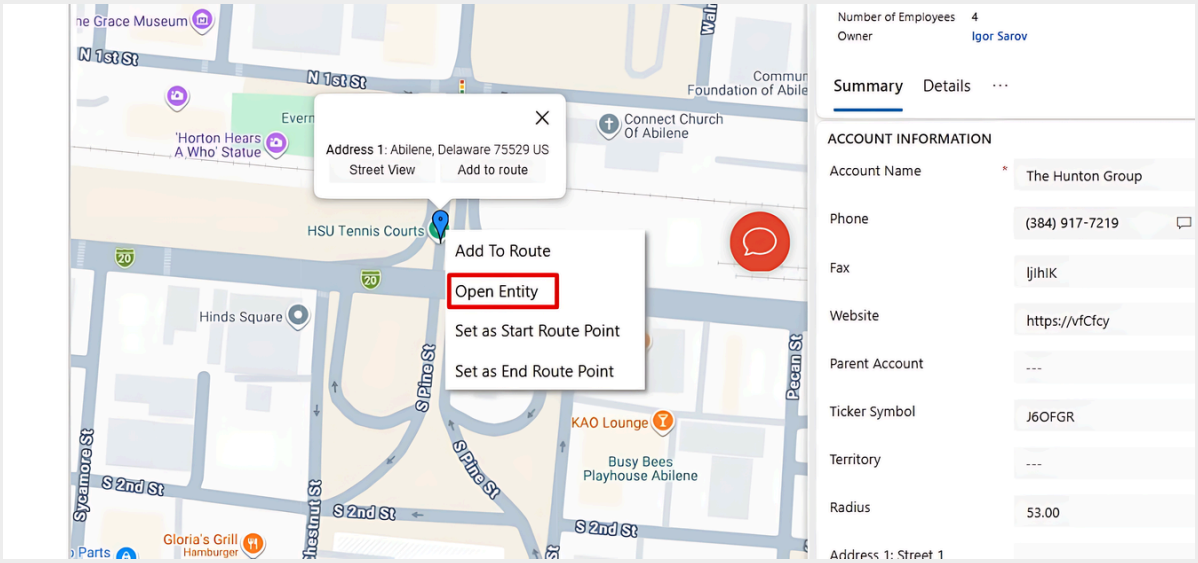
RECORD SELECTION AND INTERACTION

When selecting a record from the search results grid :

- Map Marker highlighting: The corresponding record is centered and highlighted on the map using a red marker based on its address.
- Quick options: configured quick options are available, such as Street View and Add to route.
- Entity Form navigation: Selecting the record opens the standard Dynamics 365 entity form on the right side of the interface, allowing direct viewing and editing of account details



To open an entity record in a new browser tab, right-click the corresponding marker on the map and select Open Entity from the context menu. This allows viewing and managing the full record details in a separate tab



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