

VISION^e | maps

Maps Mobile User Guide

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Introduction to Vision-e's Mobile Mapping Solution

With 200+ clients using our Salesforce mapping solution, Maps, it was a necessity for many of our users to have the luxury of utilizing a map-centric, user friendly solution right from the palm of their hands.

Vision-e is proud to present to you, Vision-e | Maps, a market grasping mobile application providing your users the following benefits:

Increased Activity: Incorporate real-time Salesforce activity logs from *Calls* to *Checkins* providing users an enhanced accountability for their daily workflows.

Territory Grip: Route daily trips on-the-go with any cancelled appointments or incorporate turn by turn GPS functionalities to saved trip.

Live Access: Find nearby accounts, leads or contacts by layering Saved Maps or create maps in live time using Salesforce-native List Views within seconds.

Join us in getting your users up and running by following the steps listed below!

PLEASE READ - Our Maps mobile app is to be accompanied with both a Salesforce license and subscription to our Salesforce mapping solution tool, Maps.

If you wish to confirm you have a Salesforce and Maps license, please refer to your System Administrator for further assistance.

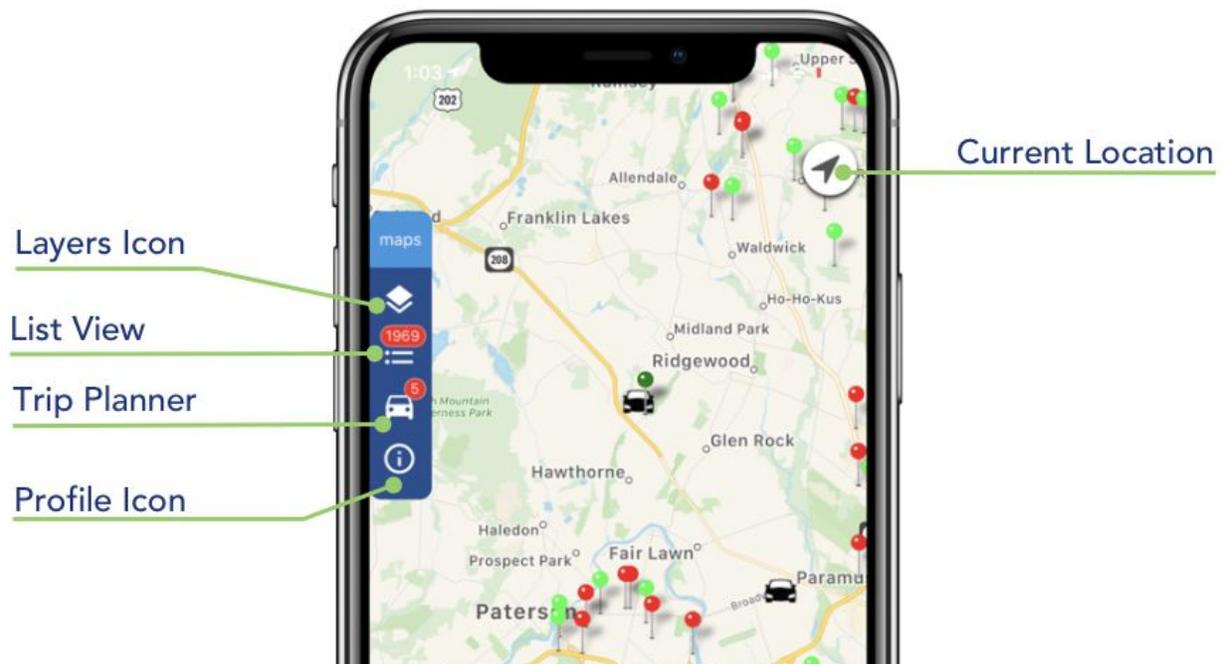
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Map the App!

Before we begin, it's important for you to understand every icon and corner Vision-e | Maps has to offer.

Please note the following diagram:



Layers: This is where you'll be able to access Saved Maps or Create Maps on-the-fly using Salesforce List Views from objects such as Accounts, Contact or Leads

List View: This tool will provide you a clean view of every record within your map(s)

Trip Planner: Here you'll be able to build routes on the fly, save planned trips for the day/week or access a direct GPS functionality powered by Google Maps

Profile: View your app package versions, access support channels, find your Salesforce user details, login or logout.

Current Location: Find nearby records by tapping on this icon to zoom onto your exact location within the map with Location Services enabled on your mobile device.

Installation

1.1 Apple App Store Install

Once you've confirmed you have both a Salesforce and Maps license assigned to your Salesforce User Account, it's now time to install our mobile Maps app! To begin, if you have an Apple iOS smartphone or tablet device, follow the steps below:

Step 1

Navigate to the Apple App Store and search for Maps by Vision-e.

Step 2

When ready, tap on GET to begin the installation process. You may be prompted to type in your Apple ID credentials.

Step 3

Once installation has been completed, we recommend confirming the application has been successfully installed onto your Apple smartphone or tablet device.

1.2 Google Play Store Install

Once you've confirmed you have both a Salesforce and Maps license assigned to your Salesforce User Account, it's now time to install our mobile Maps app! To begin, if you have an Android OS smartphone or tablet device, follow the steps below:

Step 1

Launch your Google Play App Store on your Android device.

Step 2

Tap the magnifying glass in the top-right and search for Maps by Vision-e.

Step 3

Results will be presented for apps, movies and books. Make sure to tap the Apps button at the top to search through your findings. Tap the Install button to begin downloading. You will be prompted to provide certain device permissions for the installation to continue. The app will be accessible when done!

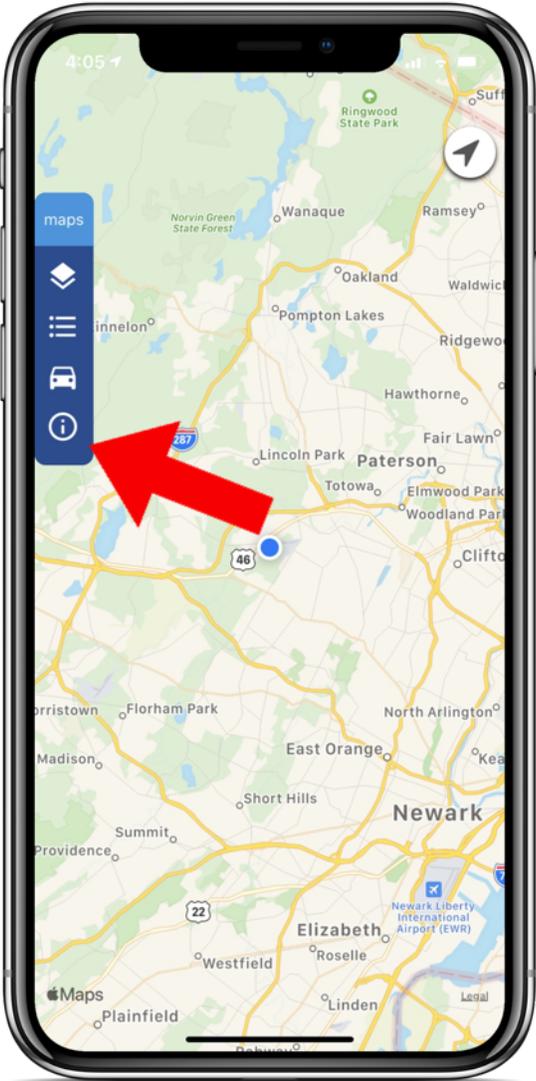
Setup

2.1 Login

Once the application has been installed and launched from your mobile device, you'll now need to login by following the steps listed below:

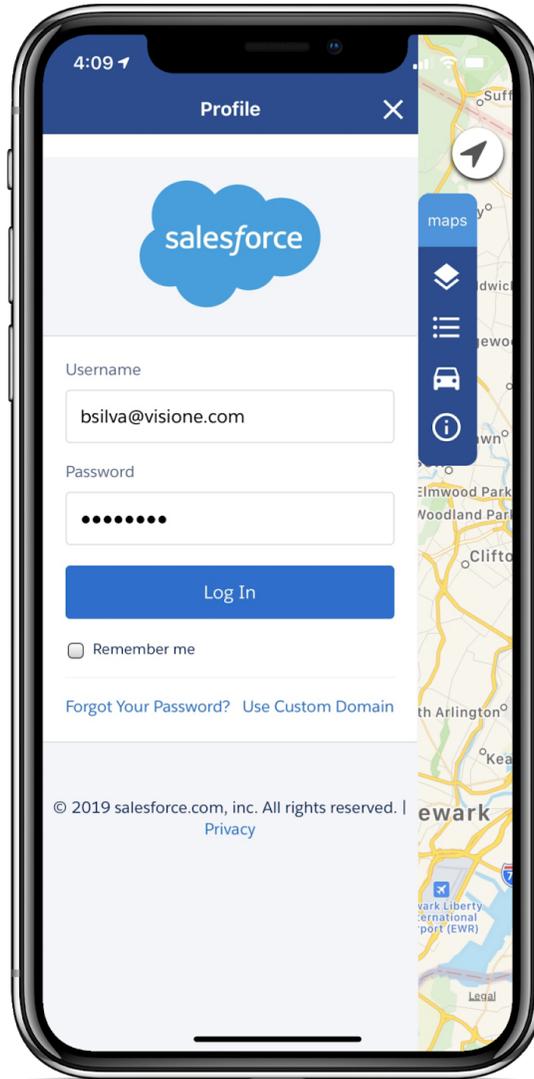
Step 1

Tap on the Profile icon as shown below.



Step 2

Next, type in your Salesforce Login Credentials in the provided fields.



Step 3

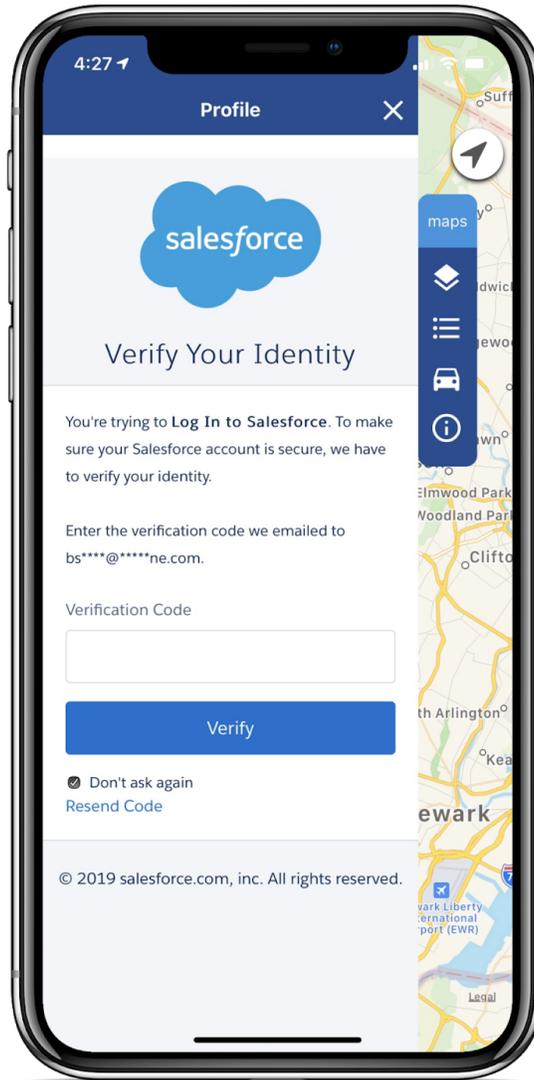
When done, tap on Log In.

Note: If you do not have a Salesforce and Maps license, you will not be able to utilize our Vision-e Maps mobile solution.

Step 3

If you are a new or first time user, Salesforce will have you generate a *Verification Code* which will be sent to your email address associated to your Salesforce User Profile.

Once received, type in the code as shown below.



Step 4

Tap on Verify when ready then Allow when prompted to allow the app access to your Salesforce.

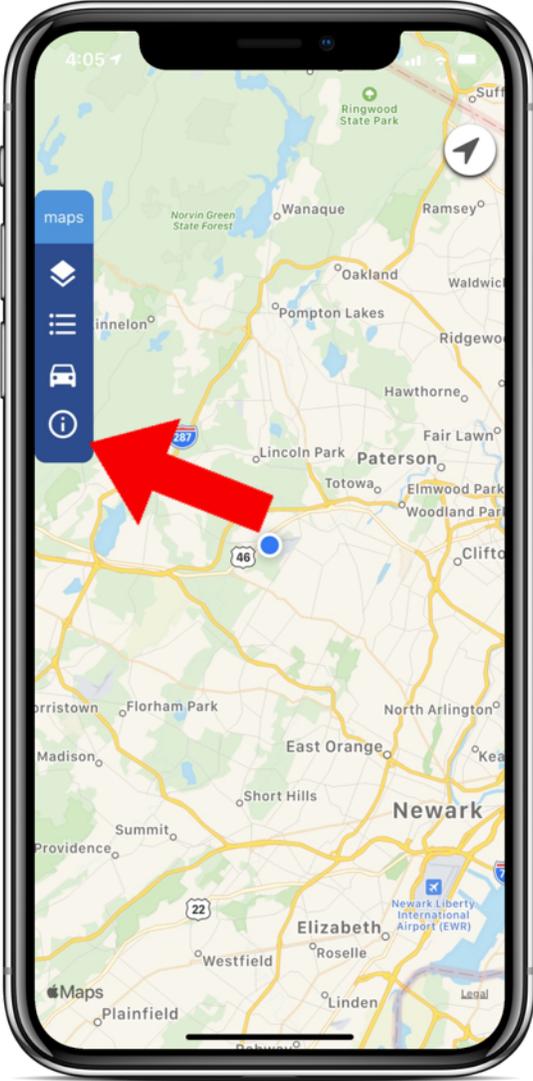
Once you're logged in, you'll be able to access your Salesforce List Views, Saved Maps from our desktop Maps app and more!

2.2 Logout

If you wish to log out of the Vision-e | Maps app, follow the steps below:

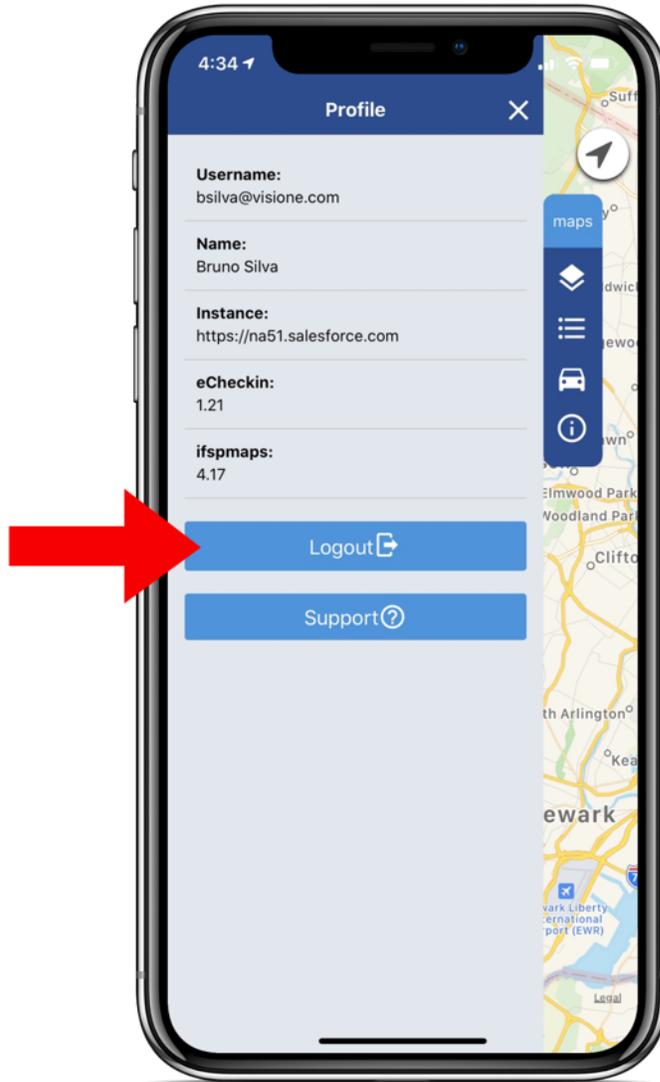
Step 1

Tap on the Profile icon on the side menu as shown below.



Step 2

Next, tap the Logout button.



Step 3

Tap Yes when prompted.

Getting Started with Vision-e | Maps

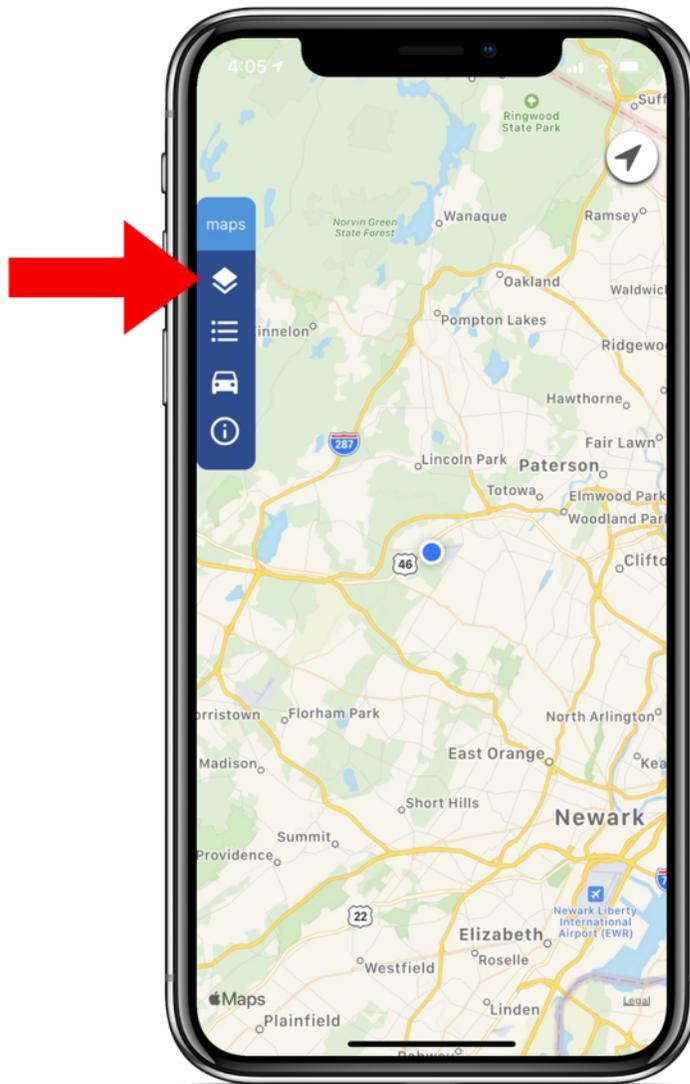
3.1 Create a Map

With our Vision-e | Maps mobile solution, you'll be able to create maps on-the-fly from the palm of your hands using Salesforce's List Views for *Account*, *Contact* or *Lead* objects.

To get started, please follow the steps listed below:

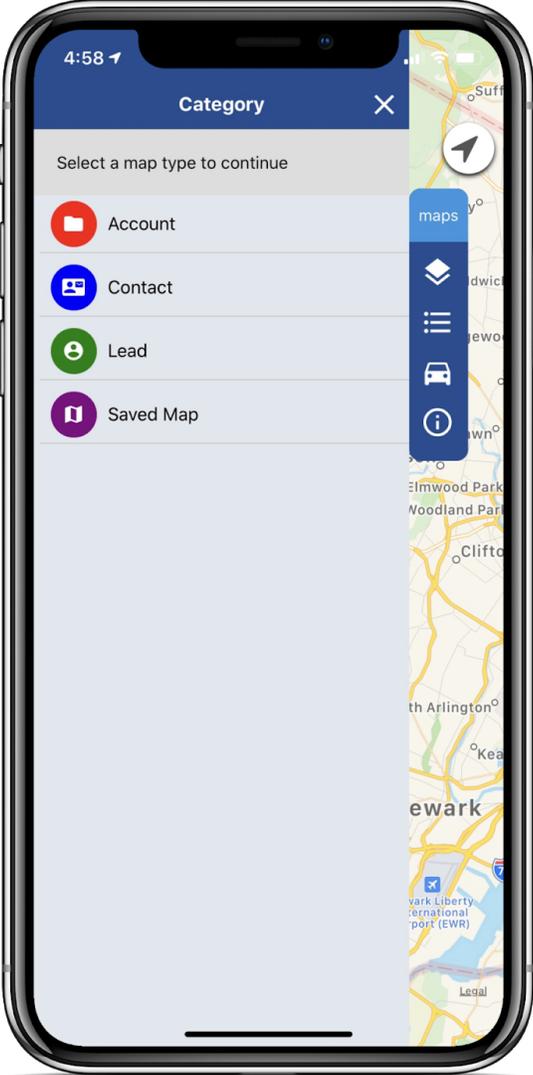
Step 1

Tap the Layers icon.



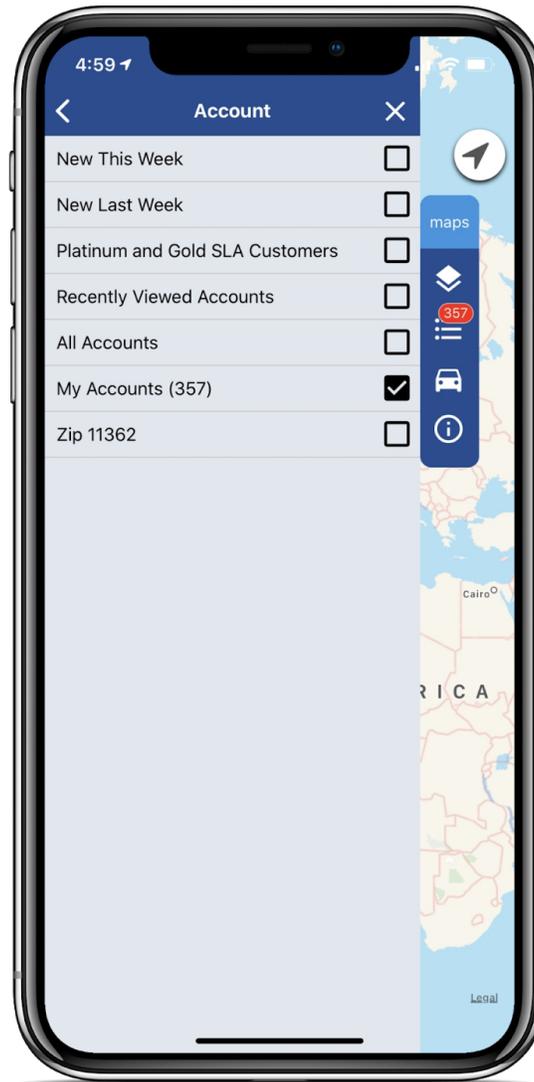
Step 2

You'll then be able to choose one of four Map Categories.



Step 3

After selecting Account, Contact or Lead, you'll be presented with your Salesforce List Views for that respective object.



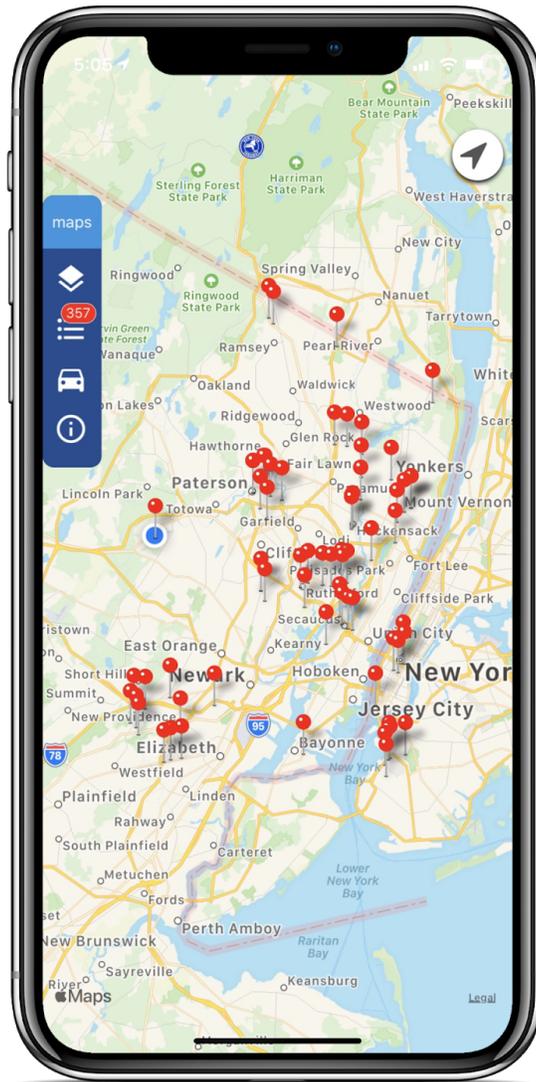
Make sure to check the box for each List View you wish to load onto your map!

Step 4

Once the layer is done loading, you'll see a number appear within parentheses indicating how many records will appear within your map.

Step 5

Next, tap on the X to close your side menu to gain access to each one of those records right from the palm of your hands!



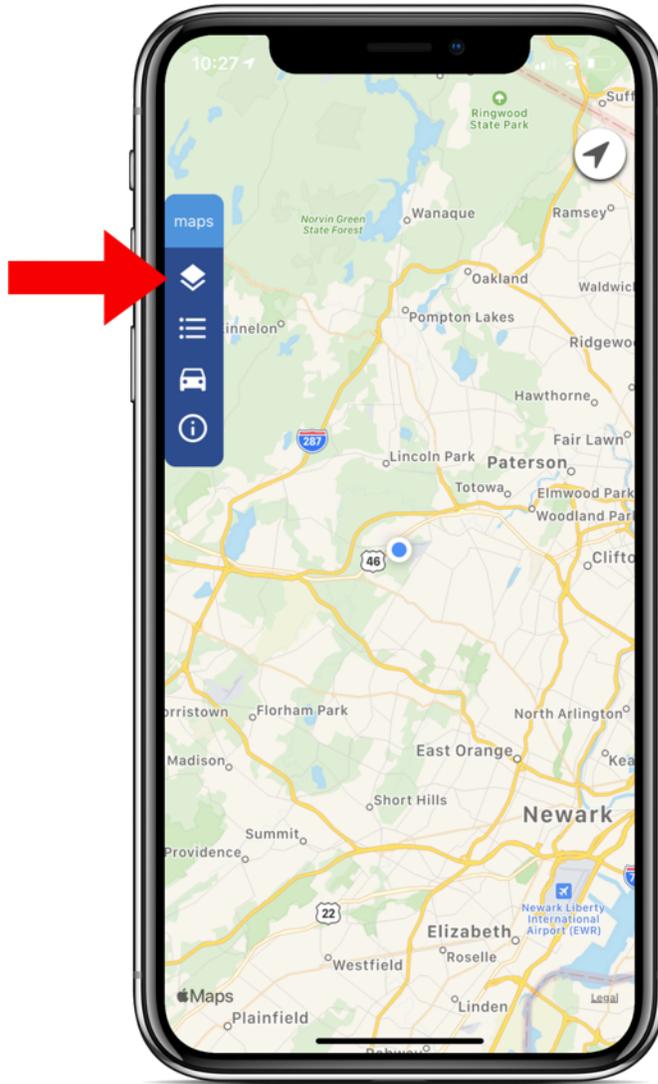
3.2 Load Saved Maps

One of the benefits in utilizing our Salesforce mapping solution, Maps, is being able to host the power of your Salesforce data and geographically view them on a user friendly, map centric platform.

With our mobile solution, Vision-e | Maps, you'll be able to flawlessly access these created maps right in the palm of your hands by following these steps:

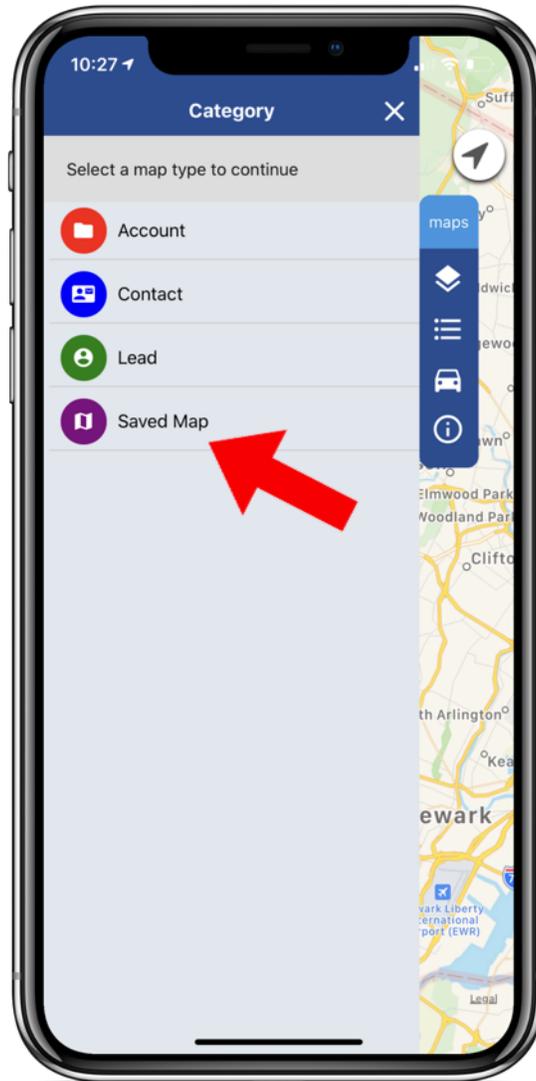
Step 1

After launching our mobile app, tap on the Layers icon.



Step 2

Next, tap on the Saved Map category.



Step 3

You'll then be able to choose whichever map you've created from the Maps desktop application native to your Salesforce by checking the box(es) next to the map name.

Step 4

When done, tap on the X to minimize the side menu and begin maneuvering around the saved map.

Note: If you cannot access your Saved Maps within the app, please have your System Admin navigate to Salesforce Setup > Session Settings under Security Controls and make sure *Lock sessions to the IP Address from which they originated* is not checked.

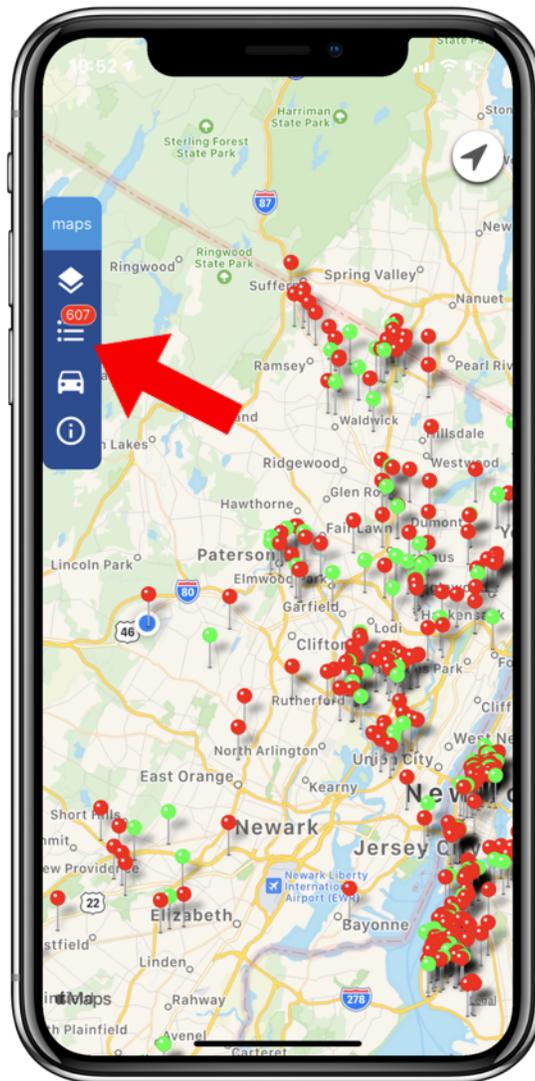
3.3 Access List View/Records

Now that you've created/opened your map, you can now access every record being displayed within the map itself within a list view.

Follow the steps listed below to do so:

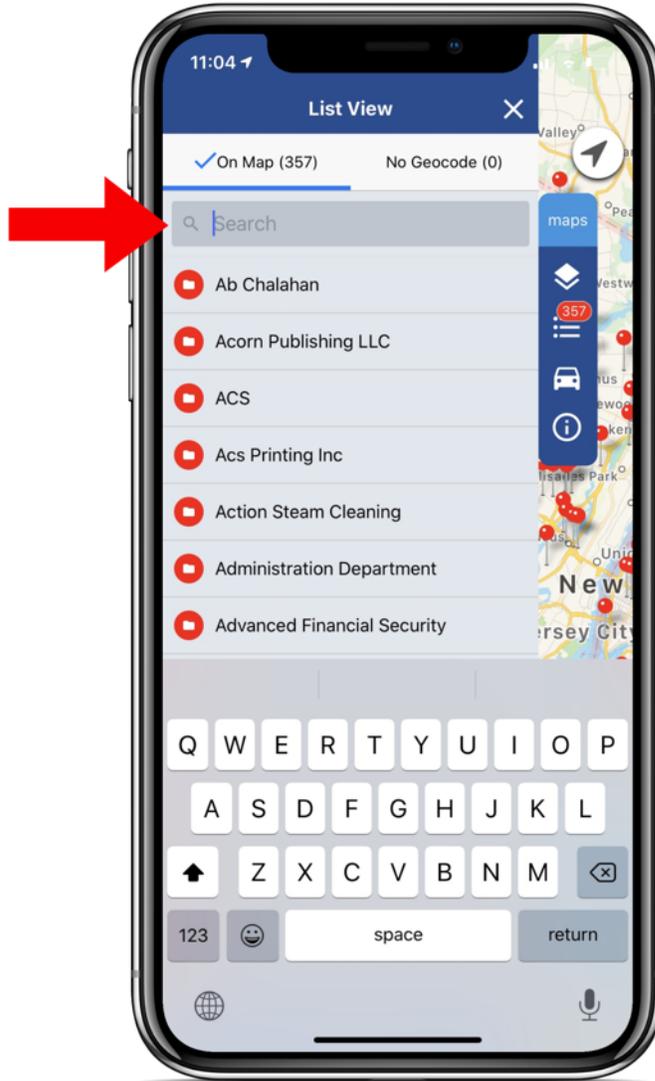
Step 1

Tap on the List View icon.



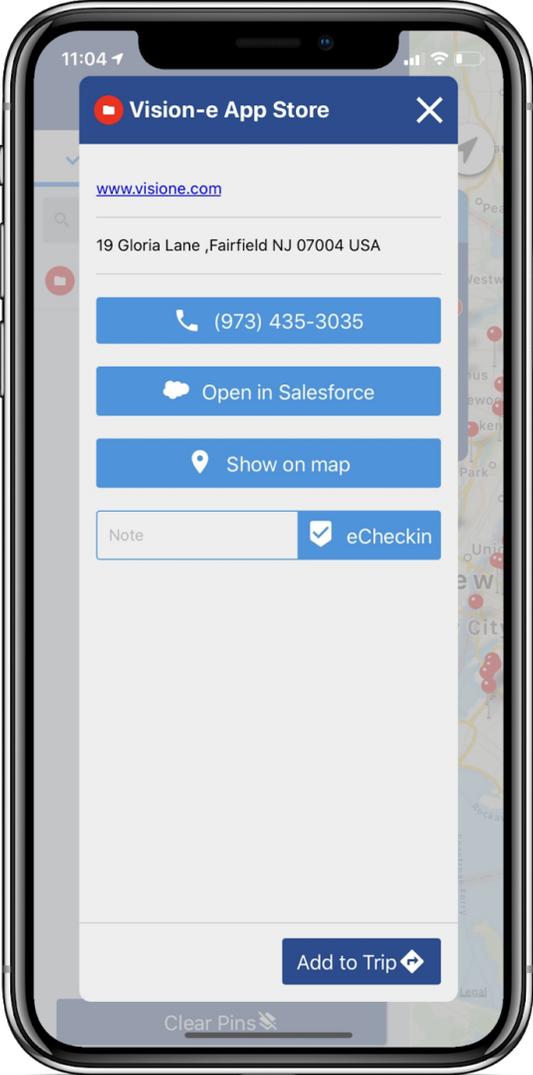
Step 2

To search for a particular record, type the record name within the provided Search bar then press Enter/Return.



Step 3

Once located, tap on the record to be able to view the record on a map, view the record within Salesforce and more!



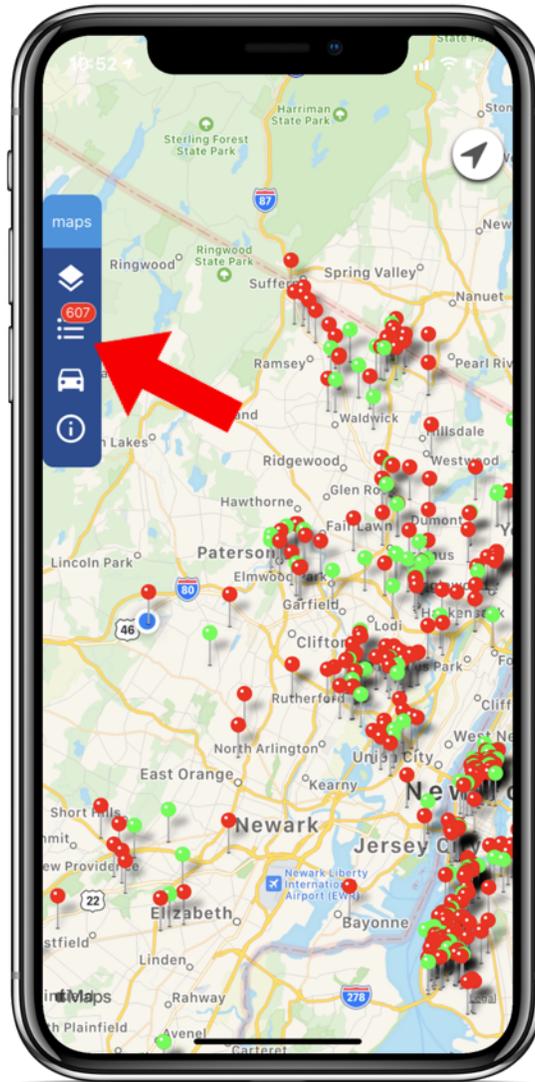
3.4 Clear Pins/List View

If you wish to start a new map view, you'll first need to clear the pins from your map.

To do so, follow the steps on the next page:

Step 1

Tap on the List View icon.



Step 2

Tap on the Clear List View button at the bottom. When done, your map will reflect a total of 0 records.

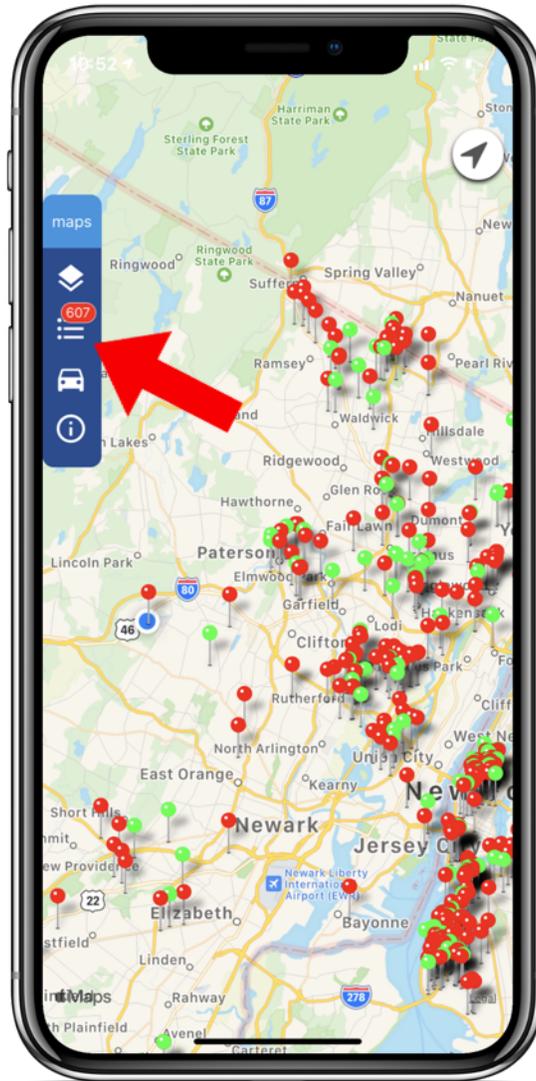
3.5 Log a Call

Whether you're looking to confirm a meeting or wanting to squeeze in a quick introduction to a new lead in your territory, you'll be able to log a call right from our mobile app.

To begin, follow the steps below:

Step 1

Launch the mobile application and open a map of your choice. When ready, tap on the List View icon.

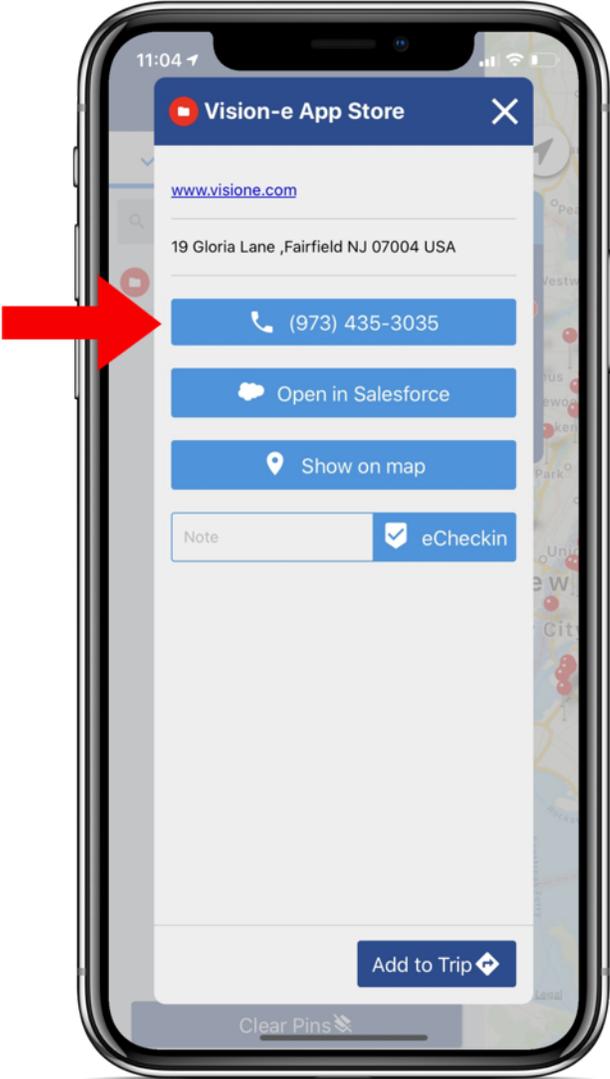


Step 2

Next, search for the record of your choice from the provided Search bar or if you've already located the record from the map, tap on the pin to access the Info Window.

Step 3

From the Info Window, as long as the record has a number associated to it within Salesforce, tap on the phone number button.



Step 4

You'll then need to confirm the action request to call the listed number.

3.6 View Record in Salesforce

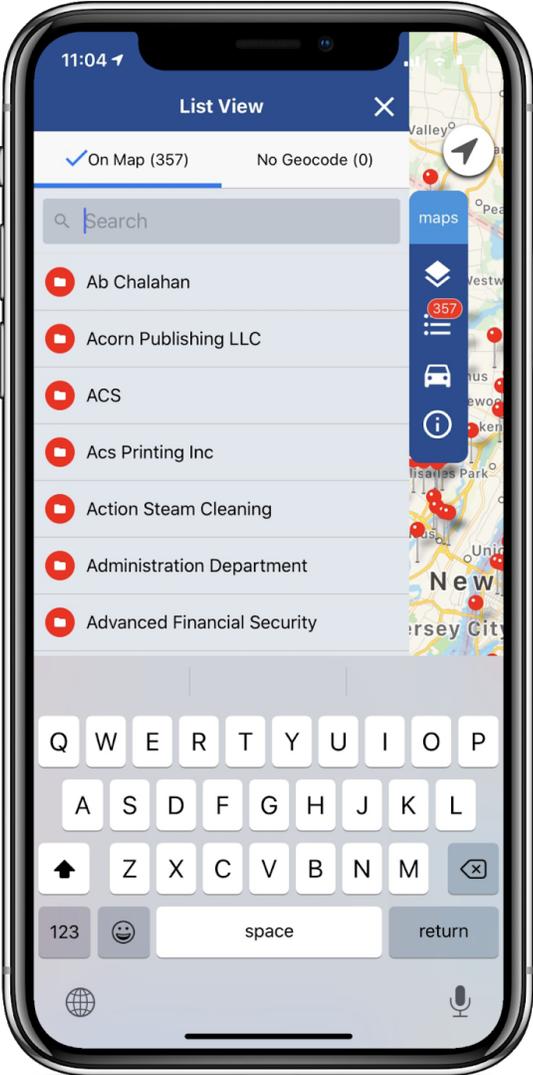
If you're looking to send an email, view your activity history, log a note or any other requests from the record's Salesforce detail page, follow the steps below:

Step 1

Tap on the List View icon.

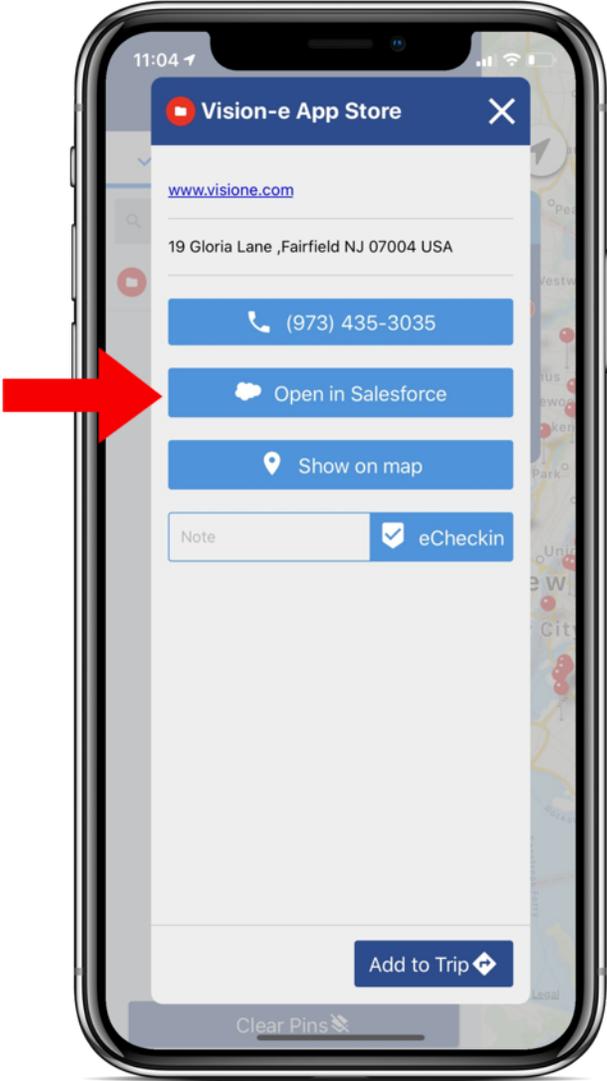
Step 2

Next, search for the record of your choice from the provided Search bar or if you've already located the record from the map, tap on the pin to access the Info Window.



Step 3

From the Info Window, tap on Open in Salesforce.



Step 4

Tap Open to confirm you wish to view the record in Salesforce. If you have Salesforce 1 installed on your mobile device, the app will automatically navigate you to the record detail page.

If you do not have Salesforce 1, you will be navigated to Salesforce.com on your mobile device's internet browser.

For best results, we recommend downloading and installing Salesforce 1.

Step 5

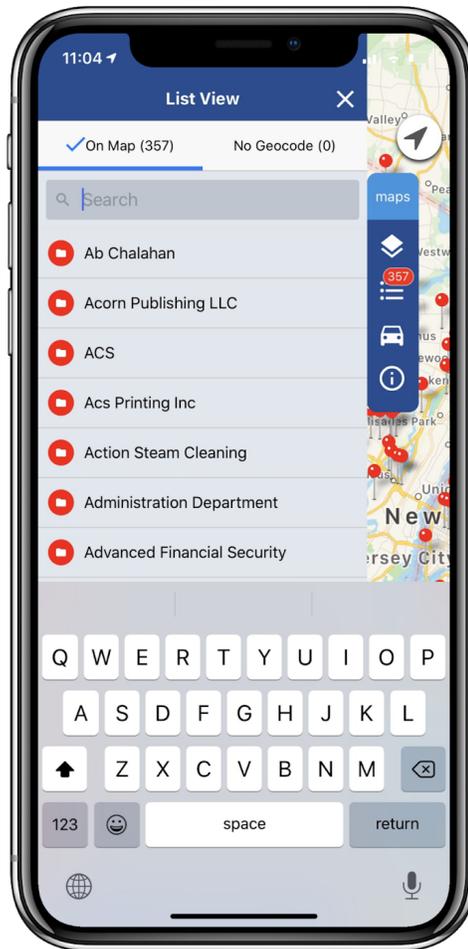
When done, jump back into your Maps mobile app when ready.

3.7 Checkin

With Vision-e | Maps, users will be able to log real-time activities when visiting their records on the field by a tap of a button. This activity will both assist the rep on viewing when they last visited their contact thus enhancing the user accountability.

Step 1

Tap on the List View icon.

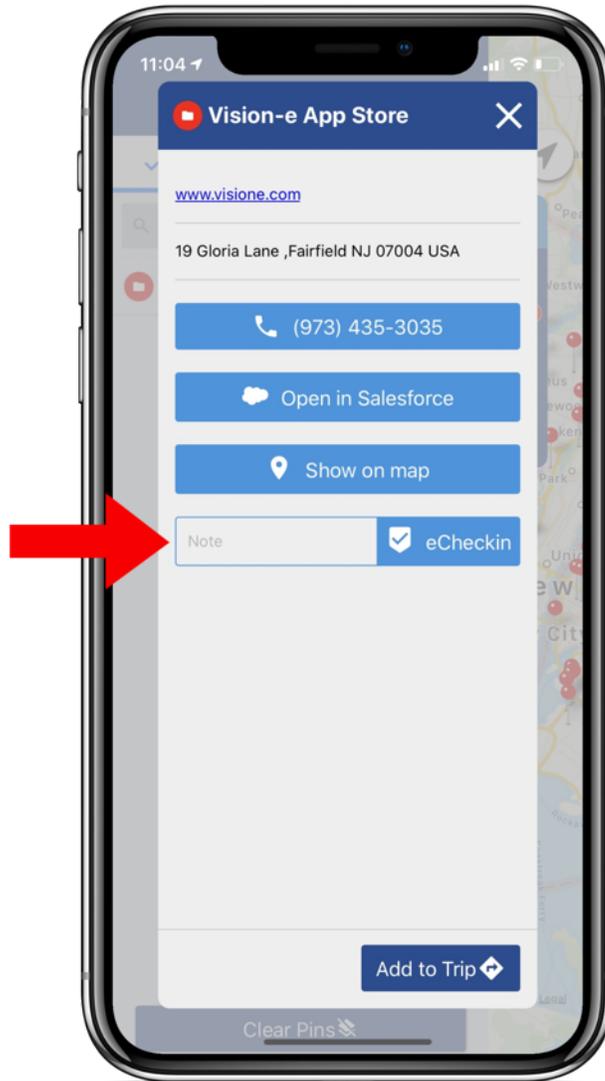


Step 2

Next, search for the record of your choice from the provided Search bar or if you've already located the record from the map, tap on the pin to access the Info Window.

Step 3

Once the record's Info Window appears, tap on the Notes field next to the eCheckin button and type in the note you wish to attach to that activity log.



Step 4

When done, tap on the Checkin button. A message will appear for your successful activity log; tap Ok to complete.

The Checkin log will now appear under the eCheckin Activity Related List. If you haven't included this related item to your Record Detail Page for that object, we recommend you do!

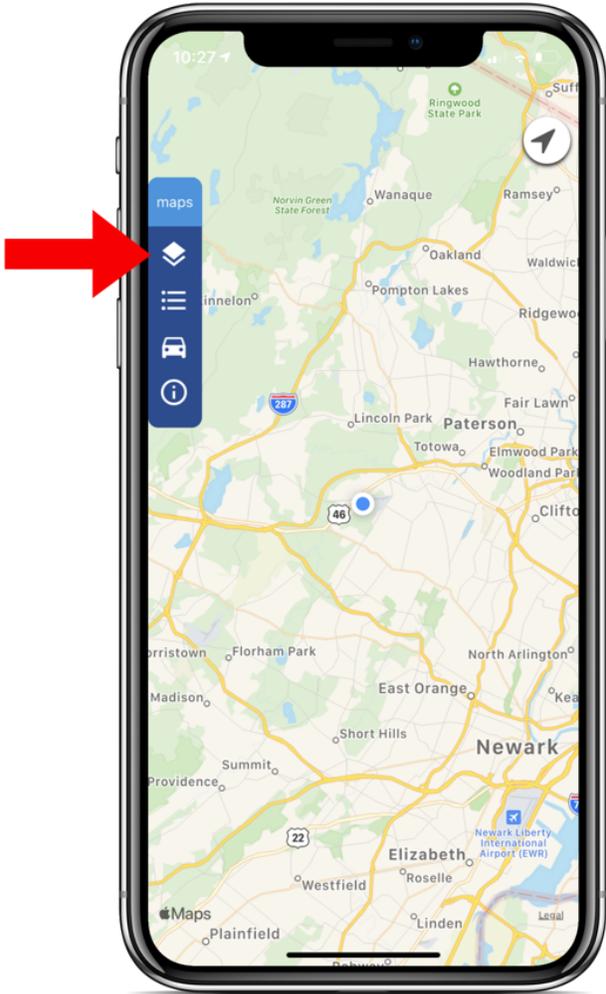
Trip Planner

4.1 Create a Trip

Whether searching for Nearby stops to make or planning your daily, even weekly routes from the office, our Trip Planner will allow you to effectively enhance your territory grip on step (or mile) at a time!

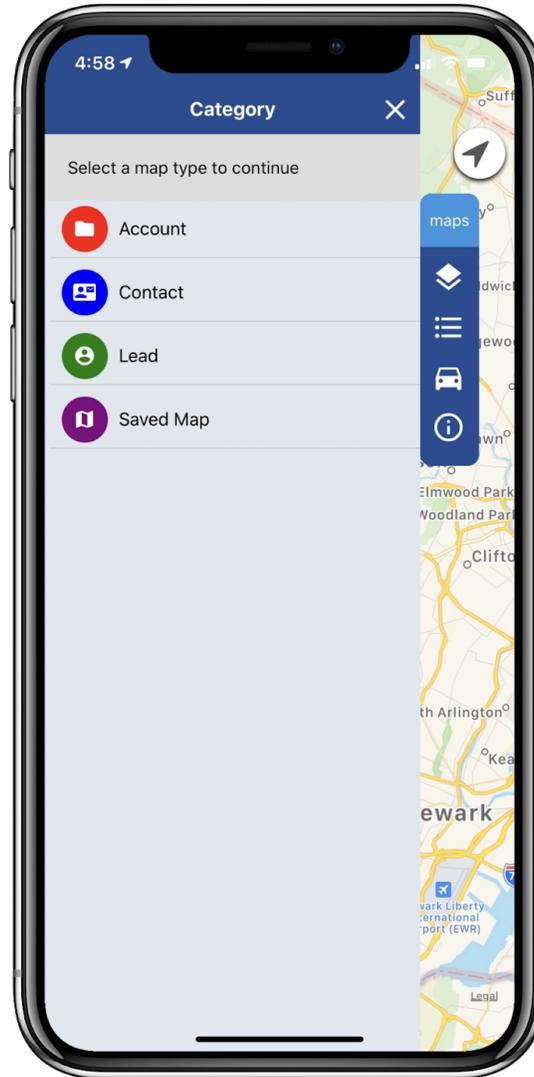
Step 1

You'll first need to open a map, so from the side menu, tap on the Layers icon.



Step 2

Next, select which Category you wish to view; whether list views to either the Account, Contact or Lead object from Salesforce OR Saved Map from your Maps app.



Step 3

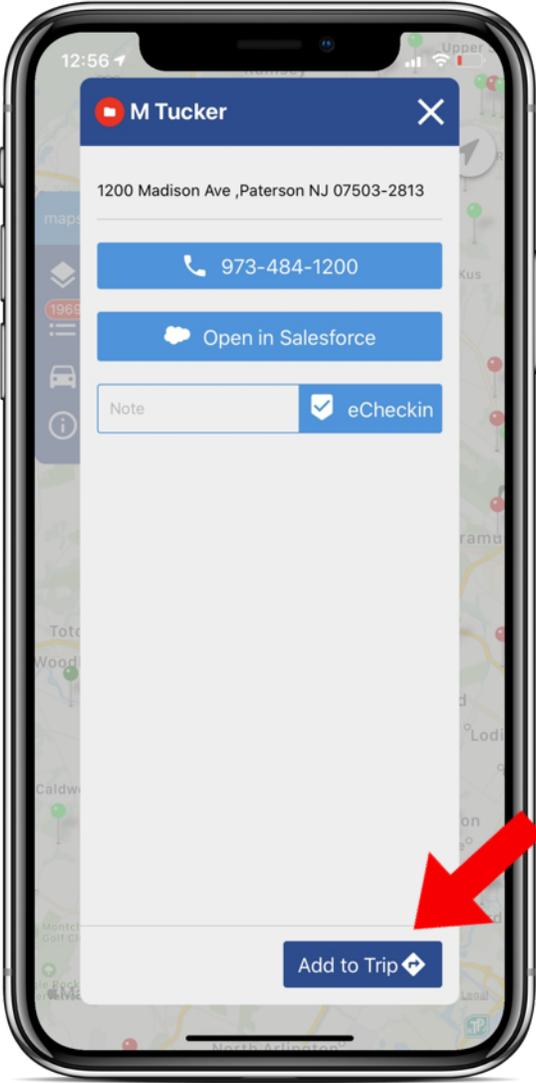
Once you've selected the map or maps of your choice, you can either search for each record you wish to stop from the List View menu using the Search Bar or navigate within your map view.

Step 4

To add a record into your Trip Planner, access its Info Window.

Step 5

From the Info Window, tap on the Add to Trip button.



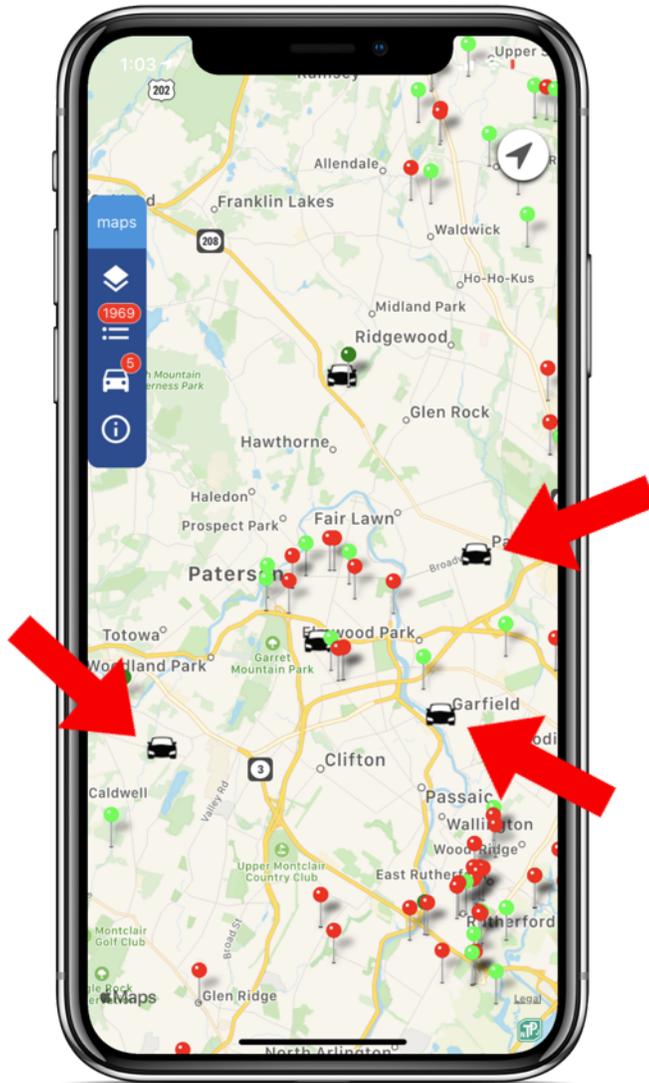
Step 6

Repeat the previous step for each record you want to include within your trip. Please note, there is a max limit of ten stops you can include within a trip.

If your day will consist of making 10+ stops, we recommend splitting the route into individual trips and saving them with unique trip names such as '*Monday's Trip 1, Monday's Trip 2, etc.*'

Step 7

As you continue to add stops to your trip(s), you'll see each stop's pin marker on the map will change to an automobile.



This will indicate the record has been included within your trip successfully.

Step 8

You can access your completed Trip(s) by tapping on the Trip Planner icon when as an automobile within the app's side menu.

4.2 Save a Trip

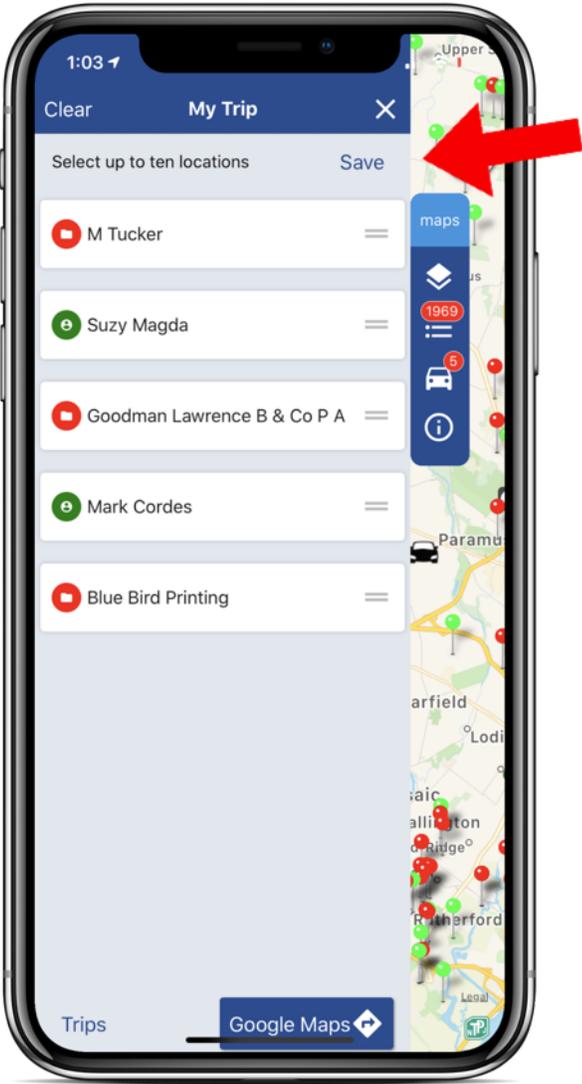
Now that you've built your trip or trips within Vision-e | Maps you'll have the ability to save them within the app by following the steps listed below:

Step 1

Once you've built your routes, tap on the Trip Planner icon resembling an automobile from the app's side menu.

Step 2

Next, to save the trip, tap on the Save link above your planned routes.



Step 3

Provide your Trip with a unique name in the provided field as shown below.

Step 4

When done, make sure to tap on **Save** on the bottom of your screen or tap on **Cancel** to opt out of saving that particular trip.

4.3 Access Saved Trips

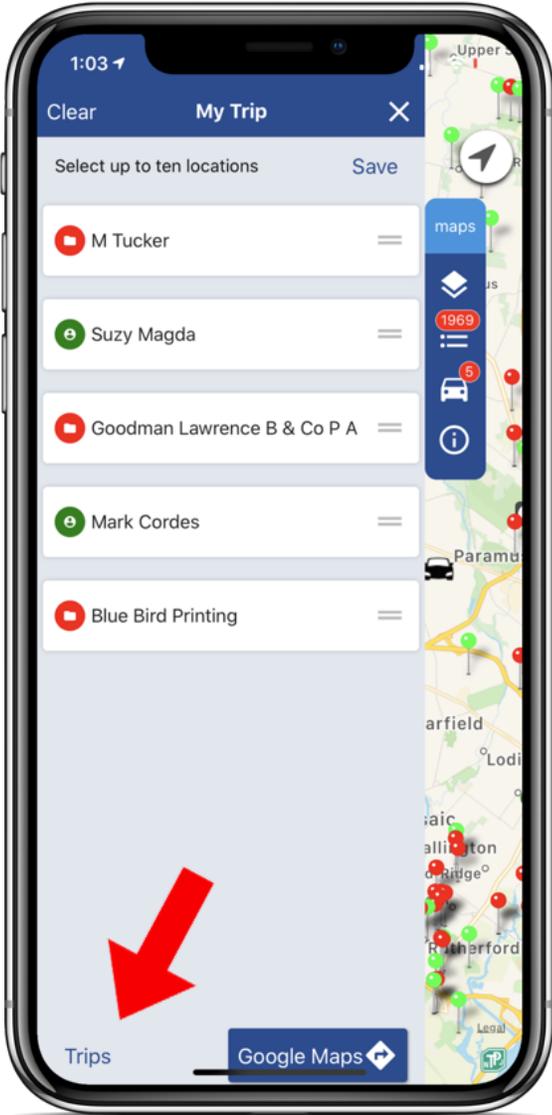
To access your Saved Trips, please follow the steps below:

Step 1

Tap on the Trip Planner icon resembling an automobile from the app's side menu.

Step 2

Tap on the Trips link at the bottom left hand side of your Trip Planner menu.



Step 3

You'll then be able to access every saved trip you've created within the app.

4.4 GPS Routing

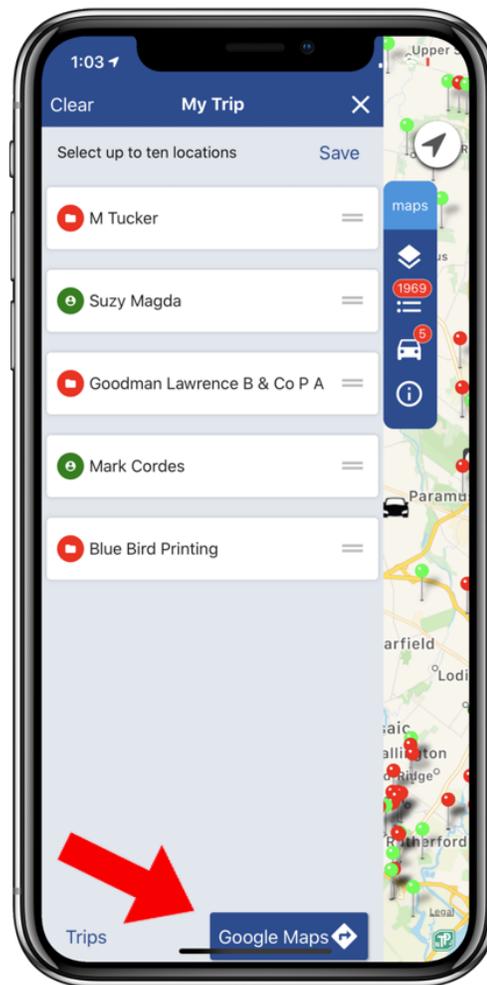
Now that you've built your Trip using the Trip Planner, users will find the luxury of integrating those turn by turn stops onto Google Maps, Google's standalone GPS web mapping service developed by Google.

Step 1

You'll first want to create or load the Trip of your choice. Please refer to Sections 4.1 to Create a Trip or 4.3 to load a Saved Trip.

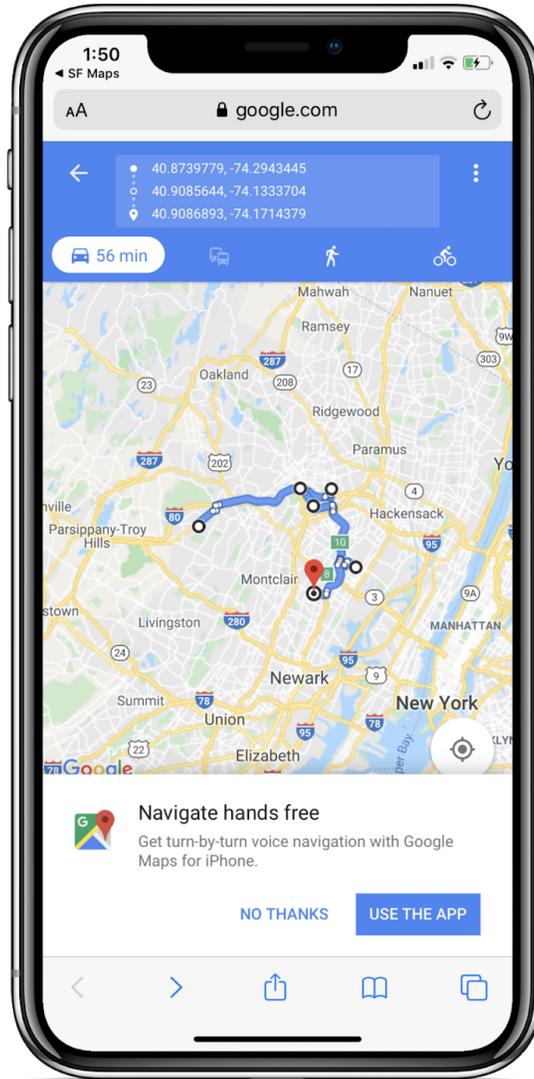
Step 2

Next, tap on the Google Maps button below your route points.



Step 3

You'll then be directed to a Google Maps .com site with two options provided to you; Use the App to export your trip onto the Google Map app or Stay on Web.



Step 3

This will be up to how the user prefers to proceed. If you wish to utilize the Google Maps app, tap on Use the App in order to be navigated to your device's native app store to begin the installation process.

Single Sign-On (SSO) & Custom Domains

Single sign-on (SSO) lets users access authorized network resources with a single login as per Salesforce which helps with benefits that consist of increased security, time saving, increased user adoption, and so forth.

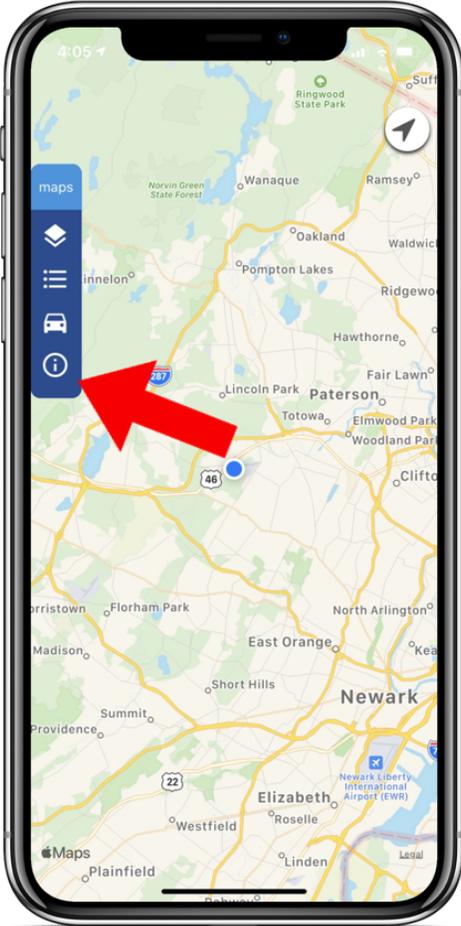
If your Salesforce Organization utilizes SSO, you're in luck! Our Vision-e | Maps app will allow users to sign in using their SSO capabilities.

5.1 Setting Up SSO / Custom Domain

In order to have your mobile app recognize your already created custom domain within Salesforce, please follow the steps below:

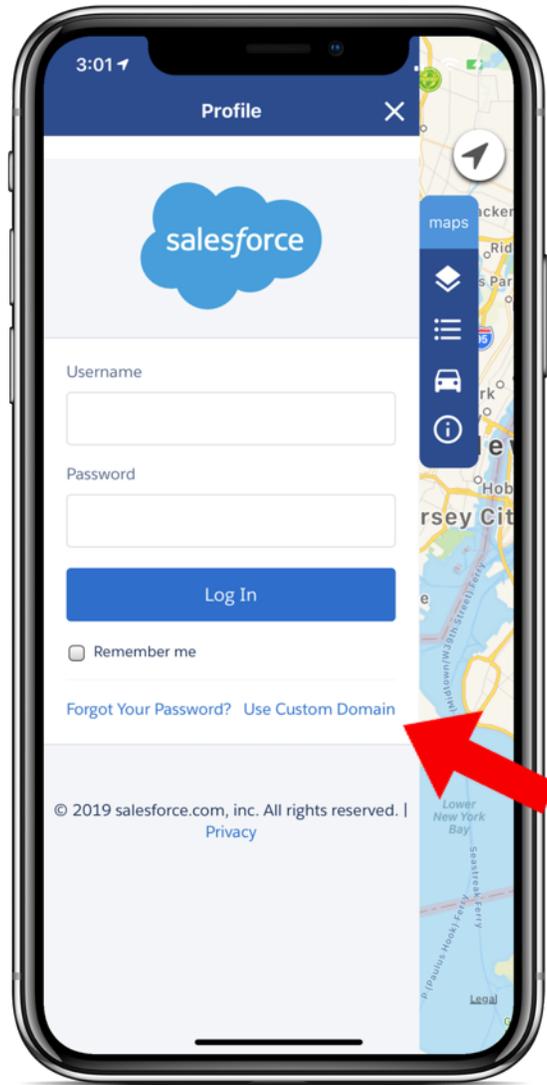
Step 1

Once you've launched your app, tap on the Profile icon.



Step 2

Next, tap on the Use Custom Domain link.



Step 3

Next, type in your already created Salesforce Custom Domain.

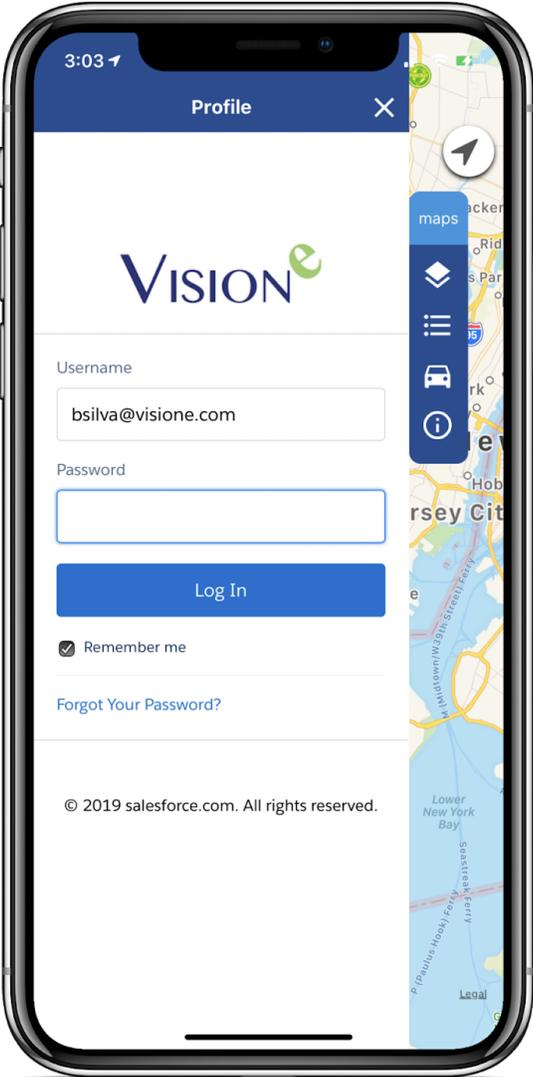
Note: Make sure to follow the instructions granted by Salesforce as characters from the URL are not required such as https://

Step 4

Once you've typed the domain, tap on Continue.

Step 5

You'll then be asked to type in your credentials for that Salesforce instance.



Step 6

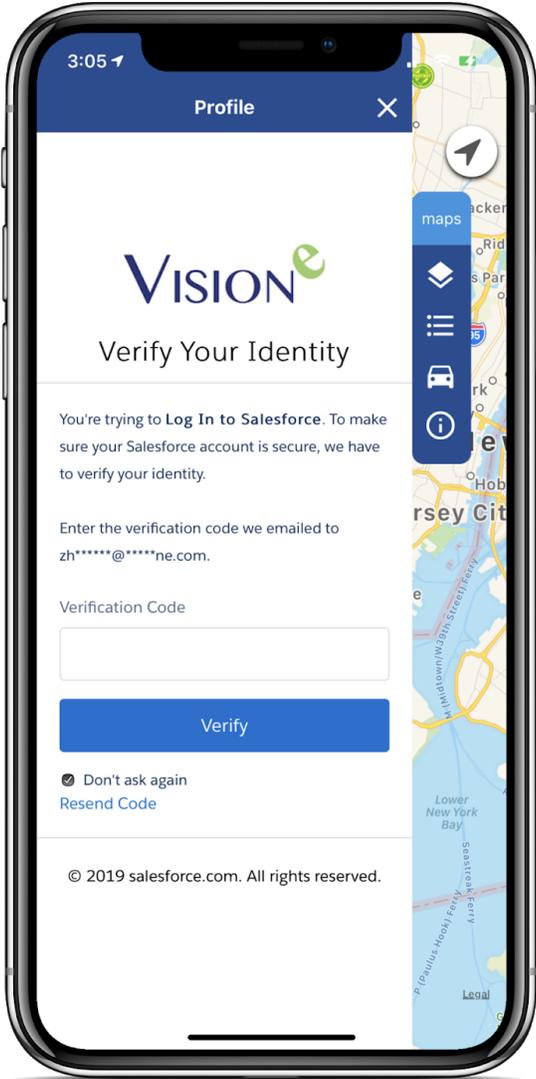
Tap on Log In when ready.

Step 7

You will be required to type in a Verification Code if you're logging on for the first time. This code will be sent to the email address associated to your user profile.

Step 8

Once you've typed in your code, tap Verify.



Step 9

When prompted, tap on Allow to provide the maps mobile app access to your Salesforce.

You'll now officially have access to your Salesforce data within your new mobile mapping app utilizing Salesforce's SSO capabilities.

Frequently Asked Questions (FAQs)

Why can't I find any of my Saved Maps?

If you cannot access your Saved Maps within the app, please have your System Admin navigate to Salesforce Setup > Session Settings under Security Controls and make sure *Lock sessions to the IP Address from which they originated* is not checked.

Do I require a Salesforce license to use your app?

Yes, you must have a Salesforce license associated to an Org where our Maps application is installed.

Do I need a Maps license to use your mobile app?

Yes. To learn more, call us at 1 (888) 611-2679 or email us at Support@Visione.com.

What mobile devices are supported?

Apple on the App Store, Android on Google Play and Blackberry that have access to Google Play. Install the scanning application on the AppExchange in your Salesforce instance before attempting to use your mobile device.

Am I automatically logged in when launching the app for the first time?

No, you must first log in using your Salesforce Credentials from the Side Menu's Profile option.

I don't see my Current Location marker on the map. Why not?

We recommend confirming if your Current Locations is both turned on and enabled for the Maps by Vision-e mobile app.

Am I able to see my custom pin colors for any Saved Maps?

Yes! One of the beauties in utilizing our mobile solution is accessing your custom marker colors you added to your Saved Maps from your native Salesforce app, Maps.

For more Frequently Asked Questions visit Visione.com/faq-maps or visit the Online Knowledge Base for additional Voice, Language and Admin FAQs.

Help & Support

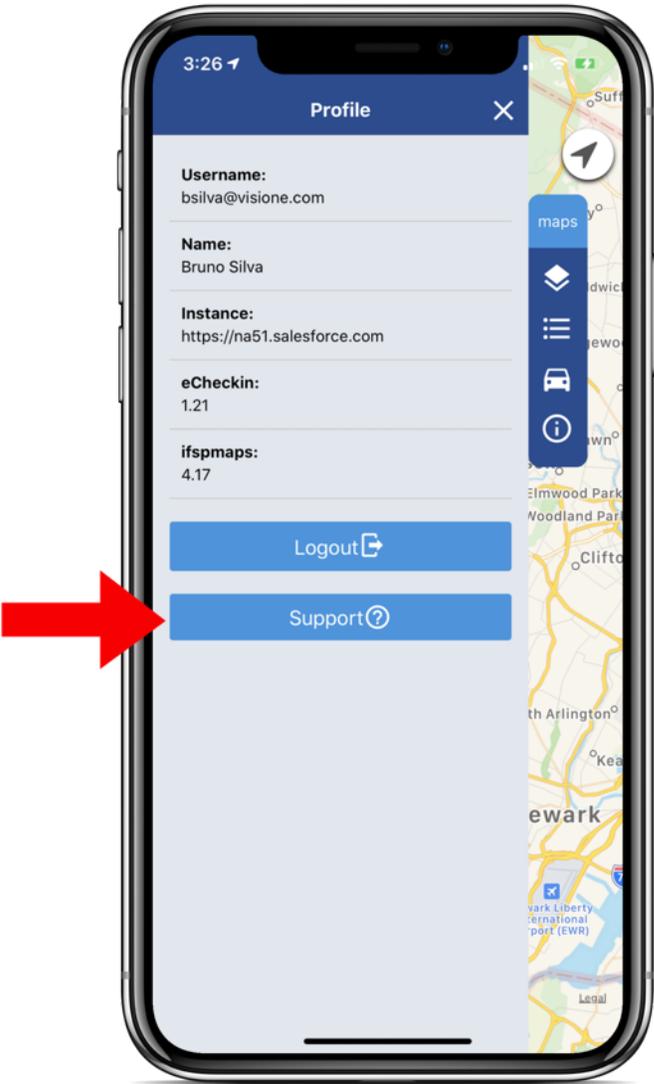
The Vision-e | Maps application provides users with a direct access to some of Vision-e’s key support channels by following the steps listed below:

Step 1

Once you’ve launched the app, tap on the Profile icon.

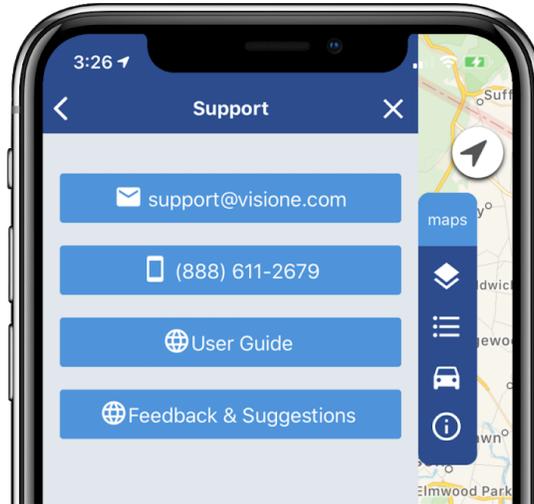
Step 2

Next, tap on the Support button.



Step 2

You'll then have access to our Support Help Desk email and phone number as well as our Maps Mobile App User Guide.



If you wish to provide Vision-e with Feedback or Suggestions, please tap on the Feedback & Suggestions button to submit your form.

We always strive to better our solutions. Vision-e is Customer Everything.

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