



VISION^e | maps

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1.0 Manage User Licenses

Maps is licensed by subscription, therefore users must have a current user license to access Maps. To obtain additional licenses for your organization please contact us at support@Visione.com.

Adding Users

- 1 Click **Your Name > Setup > Installed Packages**. Select **Manage Licenses** next to the Maps Package.
- 2 Click **Add Users**.
- 3 Select the users you wish to add from the **Available Users** list. You can add one user at a time by checking the box next to the user name, or you can add all users by clicking **Add All Users**.
- 4 The users you've selected will appear in the **Selected Users** section.
- 5 Once you've selected all of the users you wish to add, click **Add**.
- 6 You will be redirected to the **Maps Package Details** screen. The users you added will be listed in the **Licensed Users** section.

Removing Individual Users

- 1 Click **Your Name > Setup > Installed Packages**. Select **Manage Licenses** next to the Maps Package.
- 2 To remove individual users, click the **Remove** link to the left of the user name in the Licensed Users section.
- 3 A popup will appear asking if you are sure you'd like to remove the user. Click **Ok** to continue.
- 4 The User will no longer appear in the **Licensed Users** section.

Removing Multiple Users

- 1 Click **Your Name > Setup > Installed Packages**. Select **Manage Licenses** next to the Maps Package.
- 2 Click **Remove Multiple Users**. You will be redirected to the **Maps Remove Users** screen.
- 3 Select the users you wish to remove from the **Licensed Users** list. You can remove one user at a time by checking the box next to the user name, or you can remove all users by clicking **Remove All Users**.
- 4 The users you've selected will appear in the **Selected for Removal** section.
- 5 Once you've selected all of the users you wish to remove, click **Remove**.
- 6 You will be redirected to the **Maps Package Details** screen. The users you removed will no longer be included in the **Licensed Users** section.

Review Current Subscription Summary

You can check the status of your organization's subscription to Maps by reviewing the **Package Details**.

- 1 Click **Your Name > Setup > Installed Packages**. Select **Manage Licenses** next to the Maps Package.
- 2 Review the **Package Details** to see how many licenses your organization has subscribed to, the number of licenses in use and the date the licenses expire.

1.1 Geocoding Your Records

Prior to creating your Maps, you will need to ensure that all of the records in your Salesforce database have been geocoded. The geocode process will convert the address of your record into map-able coordinates, that is Latitude and Longitude. This is normally reserved to be a one-time process or whenever your addresses change. With the latest version, there are two ways to do this:

Standard Mode:

- 1 Click the tab **Geocodes**. Consult your system administrator if you do not see this tab.
- 2 If your page opens in Advanced Mode, click the **Switch to Standard Mode** button.
- 3 Once you're viewing the *Easy Geocoder*, click **Start Now** under Step 1: Geocode
- 4 When Geocoding is complete for Step 1, click on **Start Now** under Step 2: Download to complete geocoding for all records. You're then ready to create maps.

Advanced Mode:

- 1 Click the tab **Geocodes**. Consult your system administrator if you do not see this tab. If you are viewing the *Easy Geocoder*, click on **Show Advanced Mode** on the bottom right corner of your screen.
- 2 Next, to begin geocoding, select the option(s) **Geocode Account, Geocode Contact**, and etc. for each object displayed in the **Options** column for My Salesforce Objects you wish to geocode.
- 3 You will receive a popup dialog box with the Job ID # assigned to the bulk geocoding job. Click **Ok** to continue.
- 4 Under My Active Geocoding Jobs, you will be able to keep track of your geocoding by clicking on the **Refresh Status** button. For best practice, continue clicking on Refresh Status to view which objects have successfully been geocoded.
- 5 Once the geocoding for your chosen object(s) are done, click on **Download to Salesforce** under My Active Geocoding Jobs.
- 6 The **Geocode Sync** screen displays information regarding the last Geocoding Job. Select **Update Salesforce with my Geocodes** to synchronize your Salesforce records with the results from your geocode operation.
- 7 The status of the Geocoding job will be **Uploading** while the synchronization is taking place. Once the synchronization has completed, the job status will be **Uploaded** and the records will be available for Mapping.

Please note: The Geocoding process may take some time depending on how large your data count is within your Salesforce instance. If this process takes quite a while, please feel free to contact a Vision-e Support Representative.

1.2 Enabling Custom Objects

Maps supports geocoding and Mapping Custom objects. To geocode a custom object you need to enable the object in the Geocoder and define the address fields for that object. The steps to do this are outlined below.

- 1 Click on the tab **Geocodes**. If you do not see this tab, it is not visible on your profile. See your system administrator in that case.
- 2 Click the button **Manage Custom Objects**.
- 3 Select the object from the **Pick a custom object** drop down list. Drag the address fields to the appropriate boxes on the right hand side of the screen; this maps the required fields for geocoding your records.
- 4 Review and click **Save My Settings** and you will be redirected to the **Geocode Summary** screen. Your custom object is ready for mapping.

Keep in mind that you still need to geocode the records in your custom object. Click **Launch Counting Job** to refresh the addresses that need to be geocoded. To learn more about Geocoding Your Records, see Section 1.1 Geocoding Your Records.

1.3 Create a Map

Map Maker allows you to create custom maps using any standard or custom Salesforce object. Find your data using a simple point and click wizards.

- 1 To create a Map, click on the **Map Maker** tab. Select the Salesforce object you wish to map from the **Create a new map:** drop-down list. NOTE: In order to map a custom object you must first enable it using the Geocoder. For more information on how to enable custom objects, see section 1.2 Enabling Custom Objects.
- 2 Click **Continue** to proceed. You have the option of refining your query results using Standard Salesforce filtering logic. Select the fields you wish to filter, enter the query condition and the values of the records you wish to appear on your map.
- 3 Once you have added all of your filters, click Continue. If the object contains more than one address type you will be prompted to verify which address type to use for the map (for example: Billing Address or Shipping Address.)
- 4 Enter a descriptive and unique name for your map then click **Finish and Save**. All saved maps are accessible from the **Saved Maps:** tab.

NOTE: When adding Map Filters keep in mind the following:

- You will only see the fields that you have access to when filtering.
- You may select multiple values for your filtering criteria. Each value needs to be delimited by a comma (for example: Industry equals **banking, other**)
- Depending on the field type selected, the conditions will vary. For example, text based will have equal to or not equal to conditions while integer or date based fields can be less than, greater than, greater or equal, etc.

1.4 Import Report

Users have the ability to create a map within Maps using the Import Report feature. This allows for a Maps user to select a report they've created with at least one filter and graphically display the report as a map within our mapping solution tool. In order to do so, please follow these steps:

1. Click on the **Map Maker** tab.
2. Select the type of map you wish to create from the drop down menu and click on **Continue**.
3. Next, click on the **Import Report** button.
4. Once the pop-up appears, select the report you wish to use from the drop down menu and click on Import Filters.
5. Once all filters are displayed, click on **Continue**.
6. Confirm which Address Type you want to use and click on **Continue**.
7. You'll note, the map name will automatically be reflected as the report name. You can edit the map name if you want by clicking in the text box.
8. When ready, click on **Finish and Save** to complete your map.

Note: When selecting your report, Maps does not support reports that show multiple objects in one, such as Accounts & Contacts report types.

1.5 Edit a Map

As your mapping needs or data changes you may find it necessary to update your existing maps accordingly. You can quickly and easily make changes to the filtering criteria for an existing map following the steps outlined below.

- 1 To edit an existing map, click the **Saved Maps** tab. Select the map from the **Here are your saved maps:** drop down list. In order to edit map, you must be the person who created the map. You cannot edit maps that have been shared with you.
- 2 Once your map has fully loaded, click the **Edit/Delete This Map** icon from the map toolbar and click **Edit Map Filters** from the pop out menu.

- 3 Your **Map Maker** filter options will appear. You have the option of refining your query results using standard Salesforce filtering logic. You may wish to add a new field to filter by or modify the selection criteria for existing filters. Once you've completed modifying filtering criteria, click **Continue**.
- 4 If the map object contains more than one address type you will be prompted to verify which address type to use for the map. (For example: Billing Address or Shipping Address)
- 5 If you wish to keep the map name the same, click **Finish and Save**. To save the map to a different name, change the map name, and then click **Finish and Save**.

1.6 Clone a Map

Maps lets you clone an existing map, saving you time and effort customizing a new map when all that is required is a few simple modifications to an existing map.

- 1 To clone a Map, click the **Saved Maps** tab. Select the map from the **Here are your saved maps:** drop down list.
- 2 Once your map has fully loaded, click the Gear icon from the map toolbar and click **Clone This Map** from the pop out menu.
- 3 A popup will appear asking if you're sure you'd like to clone this map. Click **Yes, Clone** to continue.
- 4 You will receive a confirmation that the map has been cloned. The map will appear in the Saved Maps drop down list as **Cloned Map Name Cloned**.

1.7 Delete a Map

You have the flexibility in Maps to delete a map you've created. There may be occasions when a map you've created becomes obsolete or you want to create a new map with the same name with different criteria.

- 1 To delete a Map, click on **Saved Maps**, to open the map you wish to delete.
- 2 Select the Map you wish to delete from the drop down list and click **Load Map**. NOTE: A map can only be deleted by the user that created the map.
- 3 Once your map has fully loaded, click the **Edit/Delete This Map** icon on the map toolbar.
- 4 From the pop out menu, click **Delete This Map**.
- 5 Select **Yes, Remove** to delete the map.
- 6 After Selecting **Yes, Remove**, you will receive a confirmation that the map has been deleted.

1.8 Drilling Down Into Your Records

When your map initially loads, a broad geographic area will be displayed. There are several ways to view and drill down on your map to view your records.

Clustering:

The highest level of clustering on the map is denoted by a caption box with a number in the center. This represents a cluster of markers, which you can drill down into.

From the Map:

- 1 Click on the caption box with the number in the center.
- 2 The map will zoom down and the pins will appear on the map.

The next level of clustering occurs when many pins are on top of each other; which could represent addresses within the same building.

- 1 When clicking on a single pin, the pins will expand into a “spider view” breaking out into several other pins that share the same address.
- 2 You will be able to select individual locations.

To search for a location on your map by Name:

- 1 From the **All Records** tab, enter the location name or partial location name in the **Filter** text box.
- 2 Click the box with the location name. This will take you directly to the location on your map.
- 3 The pin for the location you selected will ‘jump’ and the **Info Window** for the location will be displayed.

To view the location record detail in Salesforce:

- 1 Click on the location pin so that the **Info Window** pops up.
- 2 Click on **View Record**.
- 3 The detail record for the location will open up in a new tab.

1.9 Customizing your Info Window

When a user clicks on a pin in a created or shared map, a pop up appears showing specific fields about the pinpoint’s record. This pop up window is called the Info Window. Users can customize this Info Window to include more fields. Here’s how:

- 1 Click on the **Edit/Delete this Map** icon and choose **Modify Info Window**.
- 2 Click on the drop down list within the Info Window Popup Customization window to select a field to

include.

- 3 Once you've chosen all the desired fields, drag and drop each field to change the order they're displayed in the Info Window.
- 4 Click on the **Save** button when done.

Please note: Any fields included within your Info Window will appear as new columns within your Excel spreadsheet when you choose to Export your Data. For any assistance on knowing how to export from Maps, please refer to Section 2.2

2.0 Drawing

Maps has a drawing tool that allows you to draw on your map with a pen and create unique geographic boundaries. As you draw on your map, the region you have drawn is saved automatically and viewable by users you have shared your map with.

Draw a New Geographic Boundary:

- 1 Click the pencil box icon from the map toolbar. A menu will appear with shape options.
- 2 Choose the **Rectangle** or **Circle** to click and drag to define the boundary. Choose the **Polygon** to create clean boundary lines or the **Paintbrush** to freehand the boundary.
- 3 The locations encapsulated within the drawn boundary are listed by name in the **Inside Boundary** tab with location details. For information on exporting these location details, refer to Export a Map.

Change the Pen Color:

- 1 Click the color box located underneath the drawing tool. A color palette will open.
- 2 Click the color you would like to draw with.
- 3 Click the pencil box icon to return to the drawing tool.

Labeling a Geographic Boundary:

- 1 Once you've drawn a new boundary on your map, a label is automatically created within that region.
- 2 To Edit the Label Name, click in the label and a pop-up will appear called **Change Shape Title**. Type in the New Name to name the Geographic Boundary.
- 3 When done, click **Ok, Save**.

Please note: As you continue to draw more than one Geographic Boundary on your map, Maps will automatically choose a different color for you to use. You can complete the previous 3 steps, if you wish to choose a specific color.

Drawing a New Geographic Boundary within an Existing Drawn Boundary:

- 1 A user can draw separate Geographic Boundaries within an already existing Drawn Boundary if specific pinpoints need separate attention from the overall highlighted region.

Joining Geographic Boundaries on your Map:

- 1 When a user wants to join more than one highlighted boundary, right click on the desired boundary and choose **Join with Shape**.
- 2 When the *Attach to Existing Shape* pop-up appears, click on the drop down list for *Attach to Shape*: to choose which of the Geographic Boundaries you want to join that shape with.
- 3 Once done, click on **Ok, Save** for joining of shapes to be finalized.

Toggle Shape Editor:

After a Geographic Boundary is drawn on a map, the user will have the ability to edit the shape of the boundary afterwards. Here's how:

- 1 Right click on the Geographic Boundary you wish to edit.
- 2 Choose **Toggle Shape Editor**.
- 3 Begin dragging the boundary points (white dots) to edit the shape.
- 4 For every edit you do, an Undo button will appear to cancel your latest change.
- 5 Once done, repeat Step 1 and Step 2 to save all changes.

2.1 Change Record Owners

Maps allows for a user to reassign Record Owners right from the created maps. In order to do this, follow these steps:

- 1 Use the Draw Tool in order to highlight the records you wish to change owners.
- 2 Next, right click on the drawn Geographic Boundary and choose Change Record Owners.
- 3 Once the New Owner Assignment pop-up appears, click on the drop down list to view which user you wish to be the new owner for those highlighted records.
- 4 Finally, click on **Yes, Transfer Now** button to complete this action.

2.2 Mass Field Update

With Maps, users have the ability to do a mass field update to any records on their map. In order to do this, please follow these steps:

- 1 Use the Draw Tool to highlight the records you wish to do a field update.
- 2 Next, right click on the drawn Geographic Boundary and choose **Mass Field Update**.
- 3 Once the Mass Update pop-up appears, select the field from the drop-down to update and replace.
- 4 When the field is chosen, type in the **New Field value** you wish to update with.
- 5 Click on **Yes, Update Now** when done.

2.3 Export a Map

Spend less time planning and creating lists using the free form drawing tool to quickly create a target list from your Maps. This tool also makes a great territory manager; simply draw the boundaries for a territory and export the list to assign ownership of the records. For more information on using the Drawing tool see section 1.8 Drawing.

- 1 Use the free form drawing tool to draw a boundary on your map encapsulating the locations you wish to export. For more information on using the free form drawing tool, click here. The locations within the boundary will be listed under the **Inside Boundary** tab.
- 2 Click **Export to Excel**. Choose **Open with Excel** or **Save File**. Click **Ok**.

2.4 Plotter

Users can manually input a pinpoint on their map using this feature. Plotter pinpoints can be useful in planning out your trip using the Trip Planner, searching a radius around your current location, and etc. A plotter can be used to find a specific address, zip code, city, and so forth. In order to do, follow these steps:

- 1 Click on the **Plotter** tab in the Map Maker box.
- 2 Type in an address to display on the map and click the **ADD** button.
- 3 Your map will automatically zoom into where the Plotter pinpoint is dropped.

Please note: If a user only adds a zip code or City/State field as the Plotter option, the pinpoint will be dropped in the center of that zip code or city's geographic boundary on the map.

2.5 Distance Overlay

Proximity Overlay allows you to map out locations that are within a certain distance of any location on a map.

Create a Proximity Search:

- 1 Click any pin on your map to establish an anchor point. The selected pin will 'jump'.
- 2 From the pin **Info Window**, click the **Radius** button.
- 3 A circle appears on the map with a red pin in the center of the circle. The default radius is 1.00km/0.62 mile.

Increase or Decrease the Proximity Radius:

- 1 Click the red arrows on the radius circle and drag to resize.
- 2 A pop up message will appear with the new radius details.

Change Location of the Distance Overlay:

- 1 Drag the red pin with the black dot to a new location on the map.
- 2 The center point will be automatically geocoded, informing you of the new location

2.6

Map Display

This feature incorporated into Maps gives users the ability to choose how the Map appears. One click changes the Map Display to Road, Aerial, Satellite or even street level view.

Change Map Display to Road, Aerial or Satellite view:

- 1 Click **Map Display Settings** on the map toolbar.
- 2 Click the **Map Display** you wish to view from the pop out menu.
- 3 Your map view is refreshed with the map display you've chosen

Show Street Level View:

- 1 Drag the person icon located at the lower right corner of your map to the location on the map you wish to view.
- 2 The street level view for the location is displayed.

Exit Street Level View:

- 1 Click the arrow in the upper left hand corner of the street level view window.
- 2 Your map view is displayed.

Note: If the street(s) where you're looking to drag-n-drop the Maps Street View are grey, this means that Google Maps does not have street view imagery for that location.

2.7 Map Styles

Another feature incorporated into Maps is the ability to choose different Map Styles. This feature allows users to customize how their created maps look.

- 1 To customize your map with different styles, click on the **Edit/Delete this Map** button and choose **Modify Map Style**.
- 2 Once the Modify Map Style pop up appears, click on the drop down list in order to choose any style you wish.
- 3 Click on the **CLOSE** button in order to implement that style to your map.

2.8 Map Visualizations

Maps allows users to view live, up to date, Traffic Patterns, Weather forecasts, and Heatmap visualizations on their maps.

- 1 To add these visualizations to your map, click on the **Map Display Settings** icon.
- 2 Next, choose which Visualization you want to add to your map by checking the box next to the option.
- 3 In order to remove these visualizations, follow the previous steps and uncheck the box.

2.9 Customize Pin Colors

Each organization has its own way of using Salesforce including the use of color to differentiate data. With Maps, you have the ability to customize up to 25 pin colors. For ease of use we recommend limiting pin customizations to 5-10 colors per map.

- 1 To customize pin colors for a map, click the **Saved Maps** tab. Select the map from the **Here are your saved maps:** drop down list. In order to customize the pin colors for a map, you must be the person who created the map. Click **Load Map** to load the map.
- 2 Click **Customize Colors** from the map toolbar. Select **Markers**.
- 3 Click **Add a new color rule +**.
- 4 You can customize your map pin colors using standard Salesforce filtering logic. Select the field(s) you wish to customize the pin color. Then enter the condition and value(s).
- 5 You can also rearrange the order of the pin color rules by dragging and dropping the grey dotted

	<p>box around the rule. Click Save once you have completed your customizations.</p> <p>6 Once you have customized your pin colors, the pins on your map will automatically update and you can view the filter logic and custom marker colors on the Map Legend tab.</p>
<h2>3.0</h2>	<h1>Permalinks</h1> <hr/> <p>The Permalink feature allows you to create and bookmark a permanent URL for any map you've created. Your map will automatically load with all of your customized settings whenever the Permalink is loaded. You can then share this link with other users.</p> <ol style="list-style-type: none"> 1 To create a Permalink for a map, click the Saved Maps tab. Select the map from the Here are your saved maps: drop down list. In order to share a map, you must be the person who created the map. 2 Click Load Map to load the map. 3 Once your map has fully loaded, click the Geocoding Settings icon on the map toolbar and select Get Permalink. 4 A window will pop up with the URL link to the map.
<h2>3.1</h2>	<h1>Map Tabs</h1> <hr/> <p>Maps has a powerful feature that allows users to have multiple maps open at one time. Each map loads into it's own tab, allowing you to switch between maps by simply clicking the tab for a map. This makes it easy to compare your Accounts, Leads, Opportunities and more side-by-side in a tabbed view.</p> <ol style="list-style-type: none"> 1 Click the Saved Maps tab. Select the map from the Here are your saved maps: drop down list. 2 Your Map view will include all loaded maps, each with a named tab. 3 To close a map, click the 'x' on the top, right corner of the Tab. <p>Please note: Repeat Step 1 for all the maps you wish to open. You can open maps that you have created as well as any maps that have been shared with you.</p>
<h2>3.2</h2>	<h1>Combining Maps</h1> <hr/> <p>The Combined Map View condenses every map that is open into one map. The Combined Map View inherits settings from the other maps so that your customized settings are retained in the combined view. This is particularly useful for viewing multiple objects on one map, such as Accounts and Leads.</p>

- 1 Load the maps you would like to appear in the **Combined Map View**.
- 2 When more than one map is loaded, the **Combined Map View** appears automatically.

NOTE: The Map Settings for the **Combined Map View** cannot be edited and/or removed. The **Combined Map View** tab will only appear when you have opened more than one map.

3.3 Share a Map

Map Sharing is a powerful feature allowing collaboration both among team members and across different departments that rely on the same information. It provides a consistent methodology for geographically organizing Salesforce data and prevents duplication of effort.

Standard Mode:

- 1 To share a Map, click the **Shared Users** tab.
- 2 Next, click on the **Click here to manage sharing** link below your Salesforce photo.
- 3 A popup will appear on your screen that will allow you to select users you would like to share your map with by typing out their names.
- 4 After clicking **Save**, a popup will inform you of your successful share. Your **Shared Users** tab will display all users sharing your map. Shared users, by default, have Read-Only access to your map(s).

Advanced Mode:

- 1 To share a Map click the **Shared Users** tab.
- 2 Next, click on the **Click here** link below your Salesforce photo.
- 3 A popup will appear on your screen. To access the Advanced Mode for sharing, click on the link stating **Click here for Advanced Mode**.
- 4 You will then be navigated to the Sharing Detail page of your map. Click on the **Add** button.
- 5 You can access who you wish to share your map with from the drop down menu.
- 6 Once your desired options have been added to the 'Share With' list, you can then edit the Access Level granted to them by selecting *Read Only* or *Read/Write* above the Save button.
- 7 When done, click on **Save**.

Note: You can only share maps with Maps licensed users in your Salesforce.com Organization.

3.4 Map Chatter

Each Map has its own unique **Map Chatter** instance that is available to any user the map has been shared with. To access this feature, follow these steps:

- 1 Load the Map you wish to collaborate on using **Map Chatter**.
- 2 The **Map Chatter** tab will read **Map Chatter @ Map Name**. Map Chatter includes standard Salesforce Chatter features such as:
 - a. Post –add and share comments or new information regarding the Map
 - b. File – attach a file to your post from your desktop or from Salesforce
 - c. Link – post a related URL link
 - d. Poll –create a survey poll that users can vote on to determine opinions among users.

3.5 Driving Directions

Create turn-by-turn driving directions and optimize your travel time using the **Trip Planner**. As you build your travel itinerary, your map updates dynamically with your route plan and driving directions are added to the **Trip Planner**. You can easily rearrange destinations in your travel itinerary by dragging and dropping locations.

Adding a New Location to your Travel Itinerary:

- 1 Click the pin on your map for the location to be added to your travel itinerary. The selected pin will 'jump'.
- 2 From the pin **Info Window**, click the **Directions** button.
- 3 Your location will be added to the **Trip Planner** and a destination point will be added to the route plan on your map.

Adding New Locations to your Travel Itinerary Using the Draw Tool Feature:

- 1 Choose your starting point by following the three steps above.
- 2 Click on the **Draw Tool** button. Highlight your Geographic Boundary on the map around the pinpoints you wish to visit in your trip.
- 3 When the boundary has been drawn, click on the **Automobile** icon on the boundary's border. This will automatically populate your Trip Planner itinerary with all of the pinpoints in the shape.

Modify the Order of your Travel Itinerary:

- 1 From the **Trip Planner**, drag and drop the destinations in the order you wish to visit starting from left to right.
- 2 The route plan on your map and **Driving Directions** will be automatically updated based on your changes.

Print Driving Directions:

- 1 From the **Trip Planner**, click **Print** from the **My Travel Destinations** section.
- 2 A separate browser window will pop up with a preview of your driving directions.
- 3 Use your browser's **Print** function to print your driving directions.
- 4 Your driving directions will be printed.

Google View

- 1 Click on the **Google View** button below your Trip Planner itinerary.
- 2 This will automatically transfer your planned route from Maps to Google Maps on your browser.

E-Mail Driving Directions:

- 3 Click on the **Email** button below your Trip Planner itinerary.
- 4 This will generate an automatic e-mail to be sent to the e-mail address you have listed within your Salesforce user profile.

Clear your Travel Destinations:

- 1 Click on the **Clear** button below your Trip Planner itinerary to remove all destination points.

Log a New Event:

- 1 From the **Trip Planner**, click the link **Create New Event** from the **Driving Directions** section.
- 2 The standard Salesforce **New Event** window will open in a separate tab.
- 3 Enter the details of the event and click **Save**.
- 4 The event is added to your Salesforce calendar.

Log a New Task:

- 1 From the **Trip Planner**, click the link **Create New Task** from the **Driving Directions** section.
- 2 The standard Salesforce **New Task** window will open in a separate tab.
- 3 Enter the details of the event and click **Save**.
- 4 The task is added to your Salesforce calendar.

Route Optimization for the Trip Planner:

To the right of My Travel Destinations, the **Optimized Travel Stops** informs the user that the listed route includes the most time efficient order of the chosen stops. The optimized stops are prioritized based on your start and end locations, displaying the total time saved above.

3.6 Roll-Up

Roll-Up allows for users to display roll-up data inside of their Geographic Boundary shapes drawn on their map(s). To begin, follow these steps:

- 1 Use the Draw Tool feature to highlight a specific area on your map around pinpoints you wish to highlight. For assistance on how to use the Draw Tool, please refer to [Section 1.9](#).
- 2 Once the boundary has been highlighted, click on the **Roll-up** button next to the *All Records* and *Inside Boundary* tabs on the bottom, right corner of your screen.
- 3 Next, click on the **New Shape Rollup** button. The Roll-Up Formula Editor popup will then appear.
- 4 Provide your Roll-Up with a unique name in the *Rollup Name* text box.
- 5 The first drop down list will provide you with available Salesforce Fields to include within the formula.
- 6 The *Output Format* drop down list will provide you with option on how the output results can be displayed within your Roll-Up.
- 7 Some simple formulas include:
 - To display the record count within the Geographic Boundary's label for the highlighted region, type in **count** within the Formula text box and click **SAVE**.
 - To display Annual Revenue, choose the Annual Revenue field within the Salesforce Field drop down and click **Insert Field**. Click **Save** to finalize this formula.
- 8 A user can choose to turn **ON** or turn **OFF** the Roll-Ups within their Geographic Boundaries by clicking the switch next to the Roll-Up name under the Roll-Up tab.

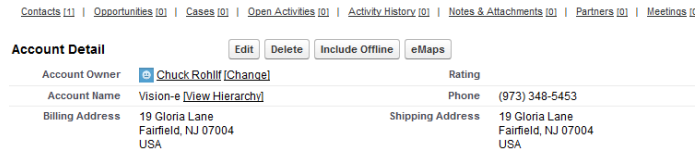
3.7 Add Campaign Members

Maps users can save time e-mailing their Leads or Contacts individually by adding them to an already existing email marketing campaign you've built within your Salesforce.com Organization. In order to do so, please follow these steps:

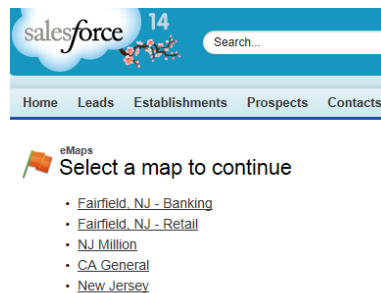
- 1 Click on the **Saved Maps** tab and select a Lead or Contact map.
- 2 Once the map has loaded, highlight a group of pins on your map using the Draw Tool feature.
- 3 Next, right-click on the highlighted region and select **Add Campaign Members**.
- 4 A popup will then appear. From here, click on the *Campaign Name* drop down menu and select the email campaign built within your Salesforce.
- 5 You will then be able to select the status for the records being added to the campaign.
- 6 Click on **Add members now** in order to finalize these actions.

3.8 Maps 'Map It' Button

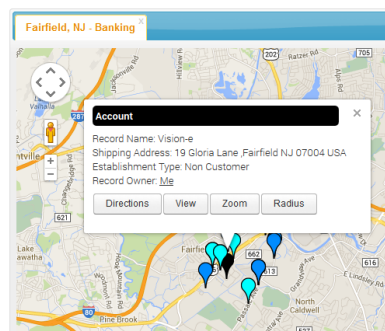
Users can now select a record as an “Anchor” and plot it on an existing map. For example, a sales rep has an appointment with Vision-e, an account in Fairfield, NJ. While out in the field, this rep would like to visit other accounts in the same city. From the Vision-e Account record, the rep can click the Map it button.



When this Maps button is clicked, the rep will be taken to a selection screen that contains all Maps that he or she has access to, that were created from the same object as the record they originated from – in this case, all Account Maps. In this example, the sales rep wants to see all Banking Accounts in Fairfield, NJ, so that map is selected.



Once the map is opened, the “Anchor” record will display as a black pin on the map with the info window already open. All other pins on the map are those that meet the Map’s original criteria. From this point, the rep can map out his or her day by utilizing the Trip Planner feature.




Now users can see how easy it is to go from a record within their Salesforce to then navigate to an already existing map within their Maps mapping solution tool, focusing in on that exact record.

If your Salesforce Administrator wishes to add this to your Salesforce Organization, please follow these steps:

- 1 From the Salesforce Setup page, navigate to the **Button, Link, and Actions** section of the object in which you are looking to add the new button.
- 2 Click **New Button or Link**
- 3 Enter **Maps** as the **Button Label and Name**
- 4 Change the Display Type to **Detail Page Button**
- 5 Change the Behavior to **“Display in existing window without sidebar or header”**
- 6 **Content Source** should remain URL
- 7 **Link Encoding** should remain Unicode (UTF-8)
- 8 Copy and paste the appropriate link listed below into the text area based upon the object in which you’re adding the Maps button. Be sure to edit the link so that it matches your Salesforce instance. Click **Save**.

Here’s a Sample Link for the Maps button:

Your Salesforce Instance **Object Variable Record ID** **Object API Name**

<https://ifspmaps.cs14.visual.force.com/apex/MyMap?recordId={!Account.Id}&object=Account>

Links for Standard Objects:

Account Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Account.Id}&object=Account
Lead Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Lead.Id}&object=Lead
Contact Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Contact.Id}&object=Contact
Opportunity Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Opportunity.Id}&object=Opportunity
Asset Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Asset.Id}&object=Asset
Campaign Member Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!CampaignMember.Id}&object=CampaignMember
Event Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Event.Id}&object=Event
Task Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Task.Id}&object=Task

Sample Link for Custom Object:

Human Resource Object - https://ifspmaps.xxxx*.visual.force.com/apex/MyMap?recordId={!Human_Resource__c.Id}&object=Human_Resource__c

xxxx* = Your Salesforce Instance

- 9 Add the newly created Maps button to the **Custom Button** section of the Page Layout
 - Navigate to the **Page Layouts** section of the object in which you’re adding the button and click **Edit** on the desired Page Layout.
 - Click on the Buttons list and drag your new **Maps** button to the **Custom Buttons** section of your page layout.
 - Click **Save**.

3.9

Map Layers

Maps already includes pre-heated layers for **US Regions, States, Counties** and **Zip Codes**.

- 1 Click the Monitor icon in the map tool bar. Choose which boundary you wish to divide your map.
- 2 Click on a specific region, state, county or zip code to view its details.

4.0

Custom Map Layers

Maps allows you to create your own Custom Map Layers to divide your map.

- 1 Upload a KML file to [Google Fusion](#) and create a Fusion Table with the zip codes and geographic coordinates for your layer.
- 2 Change the Fusion Table from private to public and copy the **Table ID**.
- 3 Return to Maps. Click the Monitor icon in the map tool bar. Choose **Custom Layer** under the Visualization menu.
- 4 Select **Create New Layer**. On the next page, select **New Map Layers**.
- 5 Give the new map layer a name. Select the Layer Type (Google Fusion Table) and paste the Layer URL (**Table ID**).
- 6 Click **Save**. When you choose the layer, it will automatically divide your map based on the data in the KML file.

Please note: Using Google Fusion Tables to create custom map layers is the top method for dividing your map. Make sure you include zip codes AND geographic coordinates in the KML file to ensure accuracy in your map boundaries.

4.1 Determining Your Version Number

To ensure that you are running the latest version of Maps, you may need to verify the version number currently installed. To determine the version number:

- Click **Your Name > Setup > Installed Packages**.
- The version number is displayed in the Version Number column.

4.2 Activating Maps for Salesforce 1

Users working with Maps now have full mobile capabilities in accessing their created and shared maps through the Salesforce 1 application on their mobile devices. Prior to doing so, please follow these steps in order to activate Maps on Salesforce 1:

1. Go to your Salesforce Setup page.
2. Click on **Mobile Administration**.
3. When the page is done loading, click on **Salesforce 1 Navigation** below 'Mobile Administration'.
4. Choose *Maps* from the 'Available' list and click to add the Maps option into 'Selected' List.
5. Once Maps is under the 'Selected' list, click **Save**.
6. On your mobile device, open the Salesforce 1 application and click on the related list icon on the top, left corner of the screen.
7. Refresh the list by dragging your fingertip from top to bottom. Maps will appear below 'Apps'.

Note: If you are in a Group Edition Salesforce Organization, Maps for Salesforce 1 is not available.

4.3 Uninstalling Maps

You need to be a user with System Administrator privileges to uninstall Maps.

1. Click **Your Name > Setup > Installed Packages**. Select **Uninstall** next to the Maps Package.
2. Review the impact of uninstalling the Maps package.
3. Scroll to the bottom of the screen and check the box to confirm that you want to uninstall this package and delete all associated components. Click **Uninstall**.

4.4

Frequently Asked Questions

- 1 Can I install Maps in my Sandbox?**
Yes, sandbox is supported.
- 2 What editions are supported?**
Developer, Professional, Group, Enterprise, Unlimited Editions.
- 3 How much does it cost?**
Maps is licensed by subscription. Please contact a Vision-e representative for pricing information. Make sure to ask about any discounts or promotions available at the time.
- 4 Do you have Heat maps?**
Yes. You can access this feature under your map's Visualizations. Refer to Section 2.9 in the How-to-Guide.
- 5 Can I share a map with a user outside of Salesforce?**
The Permalink feature allows for you to create a URL Link associated to the created map in order to distribute outside of Salesforce, but only licensed users will be able to view the map.
- 6 Is any of my sensitive information saved on servers outside of Salesforce?**
No. Maps is a native Vision-e App and only uses your Salesforce data. No data is stored on servers outside of your Salesforce org.
- 7 How many geocodes am I allowed to utilize during my trial period?**
There is no limit on the amount of data you can geocode.
- 8 How many geocodes am I allowed when I sign up?**
You can geocode an unlimited number of records. However, large volume users in excess of 100,000 records should contact us for coordination to expedite the process.
- 9 How long does it take to geocode?**
The larger the number of records needed to geocode, the longer it may take. Please be patient during this process. Please consult a Vision-e representative if this process takes a long time.
- 10 Are custom objects supported?**
Yes.
- 11 Can I save a map for everyone to see?**
You can save a map and share it with other licensed Maps users. You can also create a Permalink that will allow you to share a link to the map with other licensed Maps users.
- 12 I deleted a map by mistake, how do I get it back?**
Deleted maps can be restored from your recycle bin.

13 What iPad can be used with the Maps App?

The iPad 2 or later.

14 Does Maps require the iPad?

No. Maps is fully functional in any browser, desktop or laptop. The Mobile iPad App is not required.

15 Is the maps iPad App secure?

The Maps App uses Salesforce.com OAuth for a secure connection. You also set a Passcode to help protect the App contents. When a Salesforce User license becomes inactive, they will be automatically logged out of Salesforce the database will be deleted from the iPad. The App can be reused with another Active Salesforce account.

16 How long does it take to setup Maps on the iPad?

The Maps app installs fast and easy. The time it takes to import your data on your iPad will be dependent on the number of records and your Internet connection. A good internet connection will import 50,000 records in 20 minutes.

17 How many accounts can I have on the iPad App?

150,000 or less. If you have over 150,000, we recommend you use your browser and Salesforce Touch. <http://www.salesforce.com/sales-cloud/touch.jsp>

18 Are you Salesforce partners?

Yes. We are under contract as approved Salesforce ISV Partners

19 Are you Security Certified?

Yes. Our public corporate clients maintain our security manual on file. We are officially Security Certified under Sarbanes Oxley requirements and renew our security certification annually.

20 Are you Salesforce Certified?

Yes. We have employees on staff with Salesforce Administrator and Developer Certifications.

Notes:

Vision-e

Visit us on the Salesforce AppExchange:

[Apps](#)



Download our iOS apps for the iPhone and iPad by visiting the App Store and searching for “inField Salespro”.



For Google Play, search for "[Visione eCoach](#)" or "[Scan for Salesforce](#)".

Additional Support

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