tourManager24

INSTALLATION GUIDE

VERSION 6.1 | MARCH 2020

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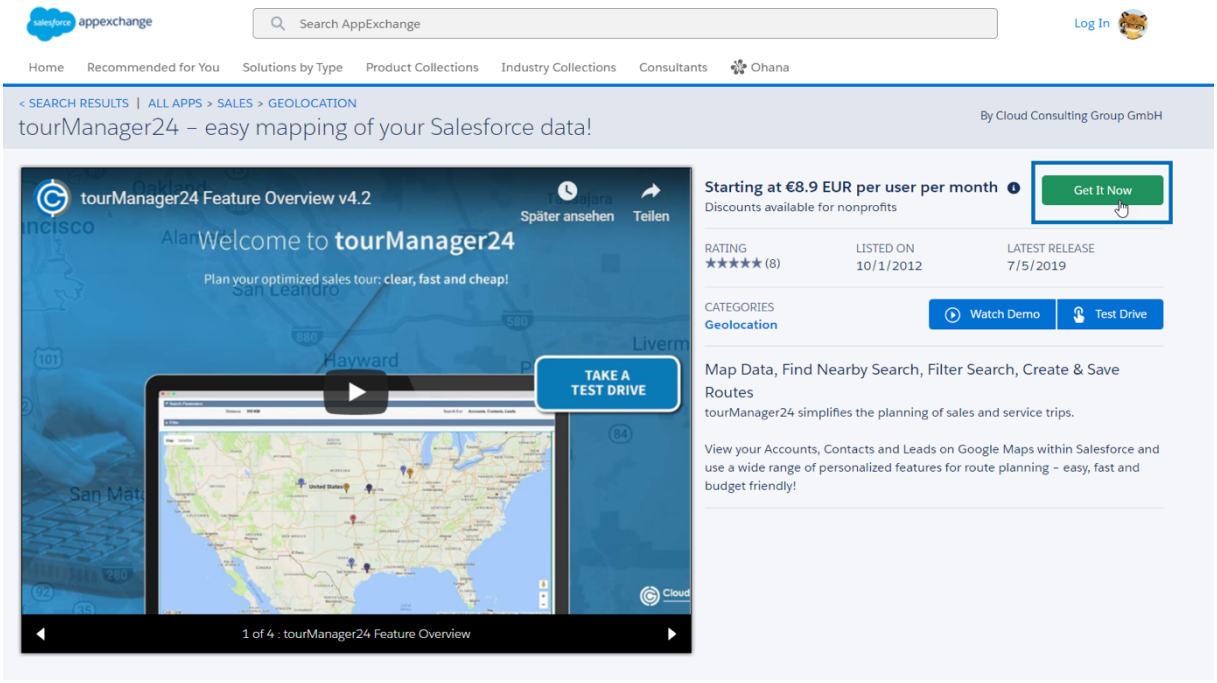
1 INSTALLATION

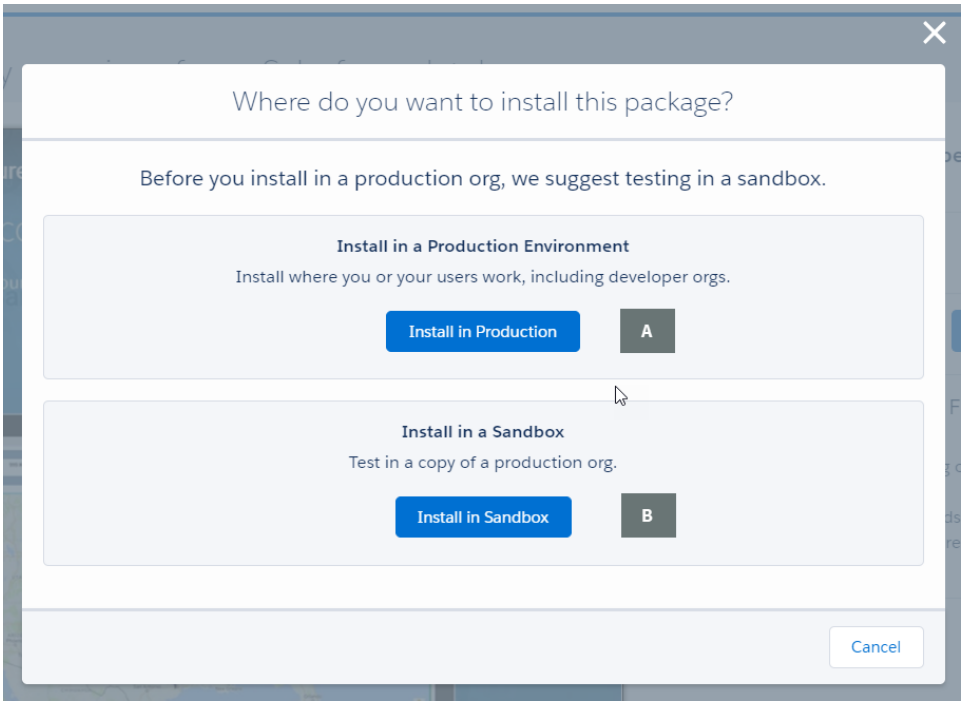
To install tourManager24 open the tourManager24 listing on AppExchange.

Click on Get It Now.

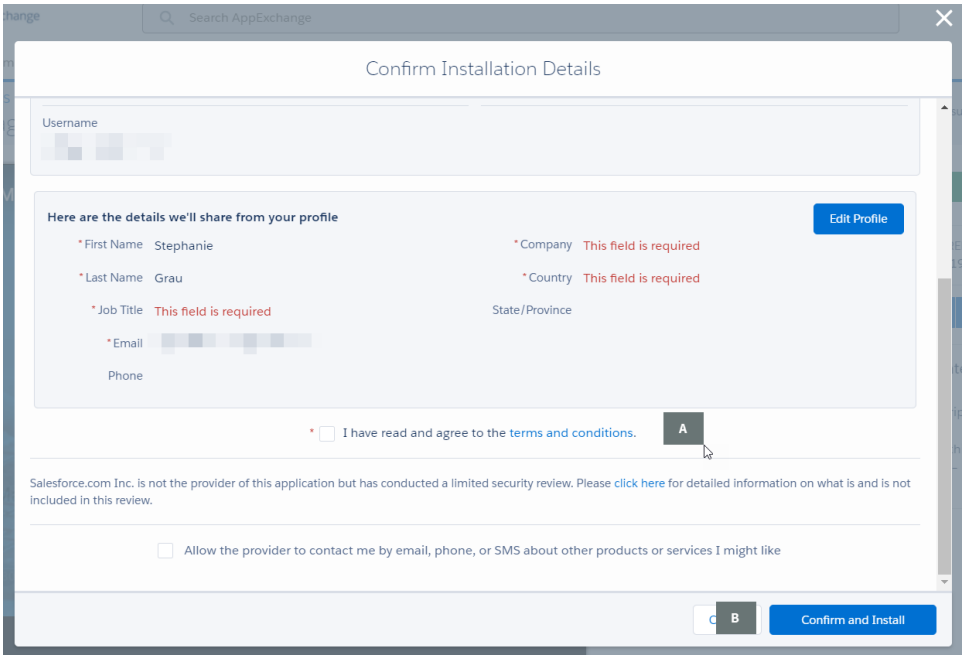


If you are not logged in already, please log into the AppExchange and your Salesforce.com org with your Salesforce.com credentials.

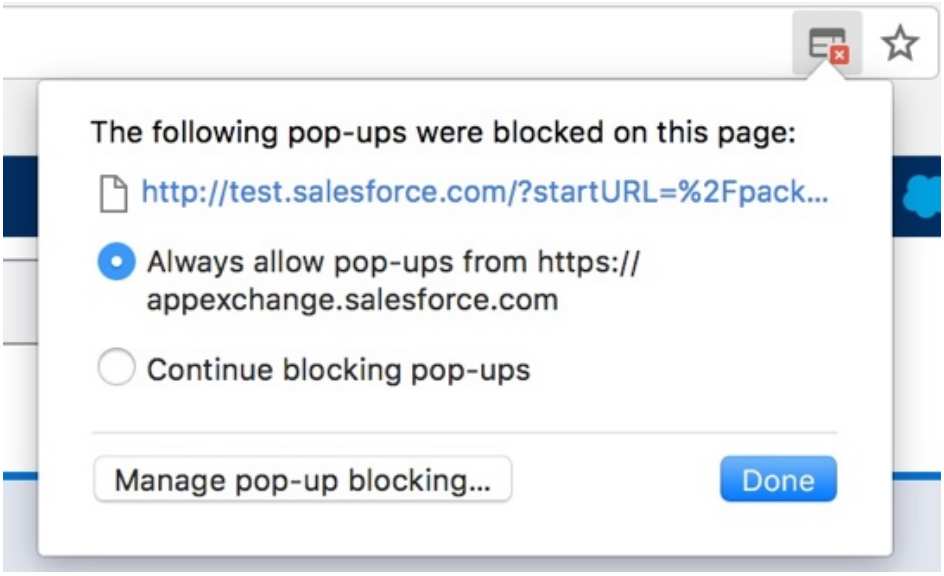
Then you can choose whether you want to install *tourManager24* in your production (A) or sandbox org (B).



Then, read the terms and conditions and accept them via ticking the checkbox next to I have read and agree to the terms and conditions (A). Then click the Confirm and Install button (B).

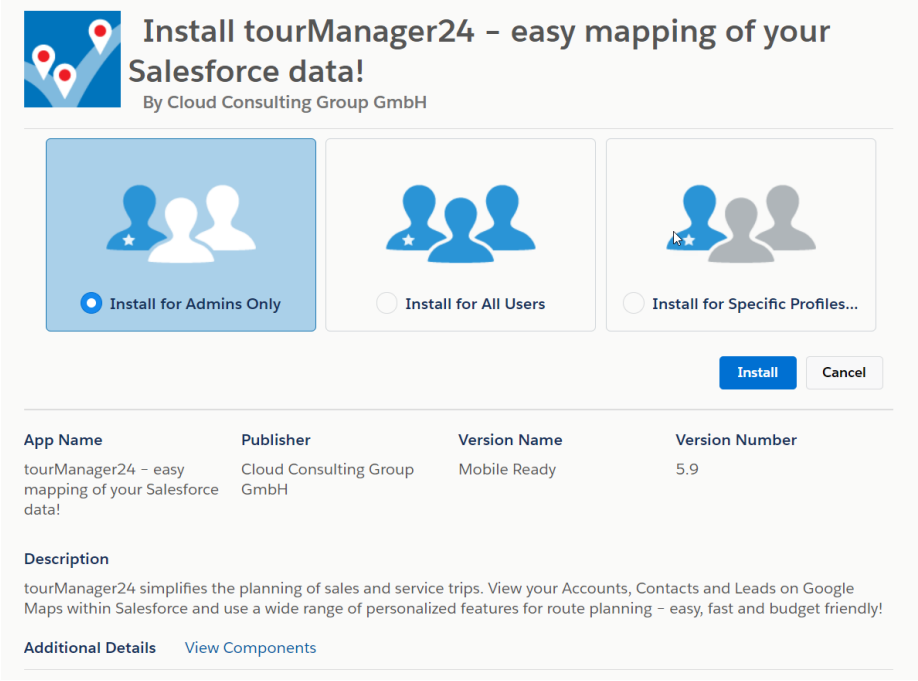


Depending on your browser setting you will have to allow pop-ups from Salesforce to proceed to the next step. If you do not want to allow pop-ups from Salesforce you will have to click on the link in the notification.

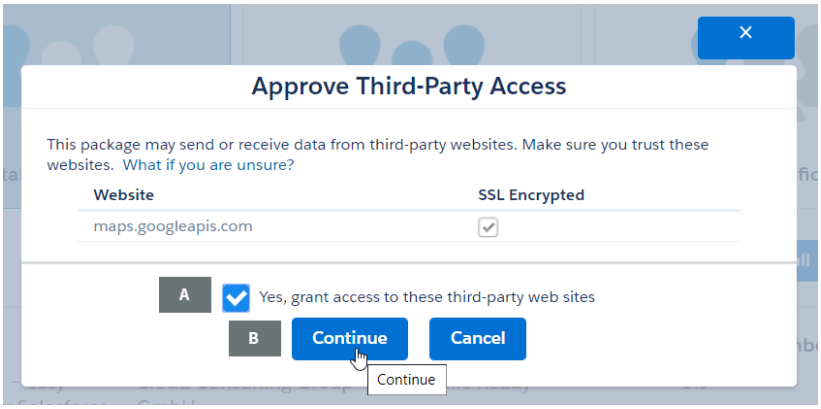


On the next screen please select for which profiles tourManager24 should be made available. You can decide whether to install the app for admins (Install for Admins Only), for all users in your org (Install for All Users) or for specific profiles (Install for Specific

Profiles…). In case you have installed an earlier version of the app already it will say UPGRADE or if this is your first time it will say INSTALL *tourManager24*.



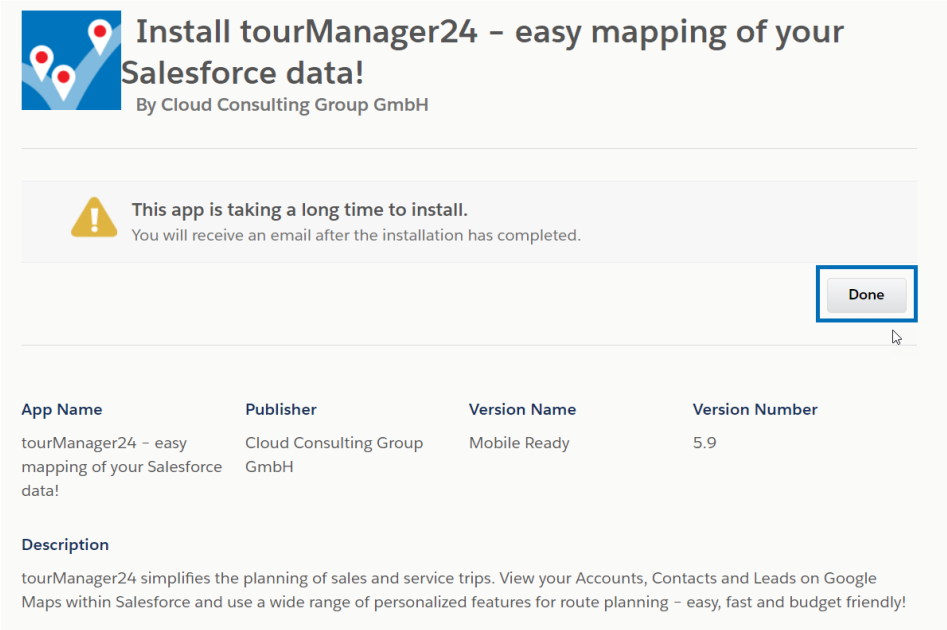
A pop-up will appear in which you have to grant access for the Google Maps API to your org. This is necessary as *tourManager24* uses this API for its geocoding and mapping services.



Tick the checkbox next to Yes, grant access to these third-party web sites (A). Then click Continue (B).

After that the installation process will start.

In some cases, it might take a while until *tourManager24* is installed and AppExchange informs you that you will receive an email when the installation has completed.



Click the Done button.

After you received the email you will find the *tourManager24* app within your “Installed Packages” in Salesforce Setup.

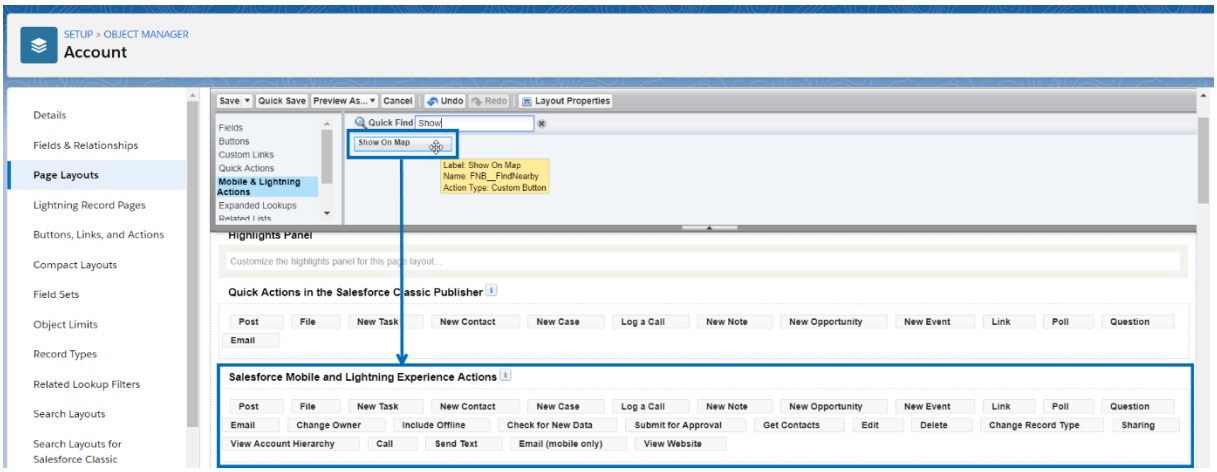
2 SETUP

Before getting started with the *tourManager24* app, please add the **buttons** to your **Page-** and **Search Layouts**. You need the buttons to access the map.

2.1 Object Page Layout

Add the Show on Map button to your Account, Contact and Lead Page Layout(s).

Go to Setup → Object Manager → Accounts → Page Layouts → Select the Page Layout where you want to add the button to. On the Edit Page go to Mobile & Lightning Actions and type Show on Map.



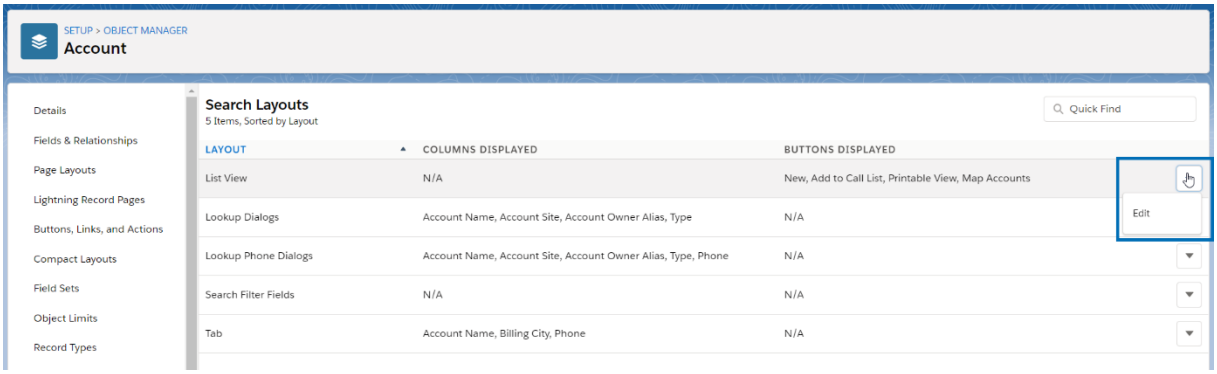
Please do the same for Contacts (Setup → Customize → Contacts → Page Layouts) and Leads (Setup → Customize → Leads → Page Layouts).

Repeat this step for all Page Layouts where you want to make the button available.

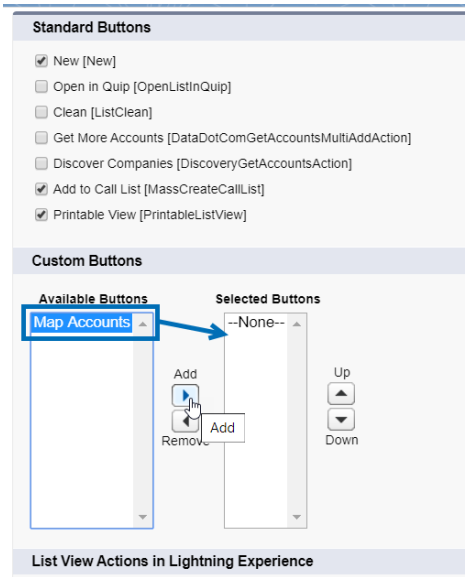
2.2 Object Search Layout

Add the Map button to the Search Layouts for Account, Contact, Lead, Opportunity and Case in order to make list views' multiple locations available to *tourManager24* and displayed on the map.

Go to Setup → Object Manager → Accounts → Search Layouts for Salesforce Classic. Click Edit next to "List View".



On the “Edit Search Layout” page, select the Map Account button from the list of Available Buttons and add them to the Selected Buttons.



Please do the same for Contacts, Leads, Opportunities and Cases.

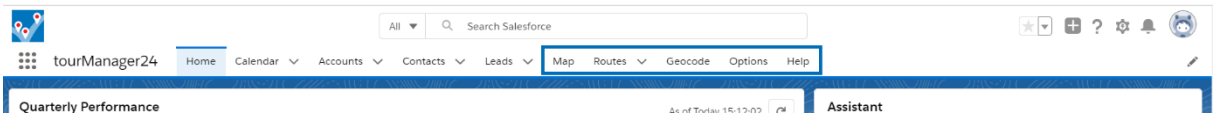
2.3 Tabs

The app will be delivered as managed package with the following tabs as default:

Home, Accounts, Contacts, Leads, Map, Routes, Geocode, Options, Help

You may choose to add the additional tabs to any of your existing apps. To integrate tourManager24 into one of your apps please add the following tabs:

Map, Routes, Geocode, Options, Help



> For instructions to find the permission settings to make *tourManager24* available for your org’s users see the Admin Manual.

3 GEOCODE YOUR DATA

The next steps can only be performed by a user with ADMIN permissions.

In order to depict your data on map, there must be geographical coordinates added to your Account, Contact and Lead records.

Within *tourManager24* you can choose to either geocode your data with tourManager24 Geocoding or use Standard Salesforce Geocoding using Data.com geocode Clean Rules.

Using tourManager24 Geocoding your data is geocoded using Google Maps API. Since tourManager24 4.2 release you can schedule this geocoding job.

We recommend using Standard Salesforce Geocoding if your org has more than 100,000 records (Accounts, Contacts and Leads) to be geocoded, as tourManager24 underlies Google Map restrictions allowing only 100,000 API calls a day.

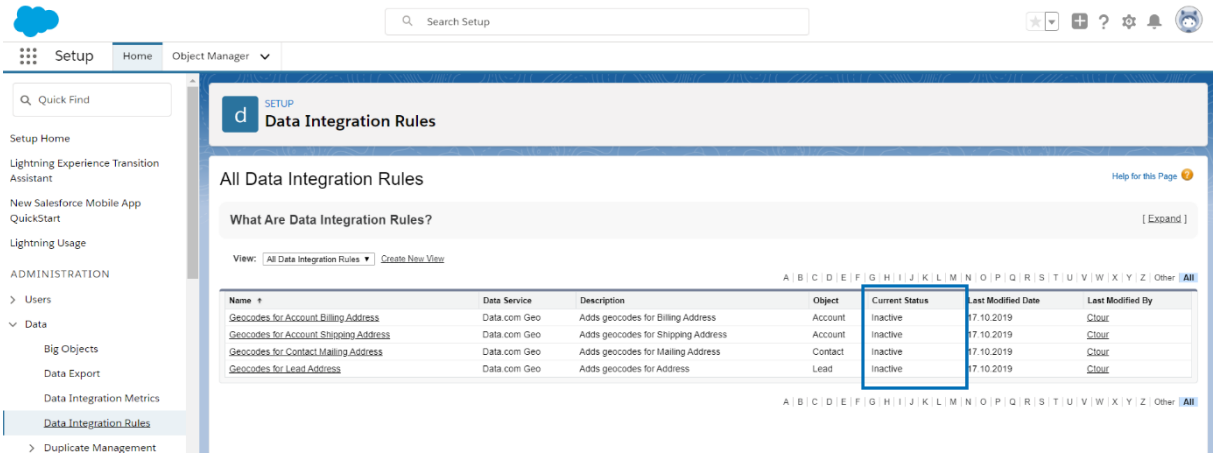
> Our internal tests have shown some inaccuracies of the Standard Salesforce Geocoding feature resulting in several addresses which did not get proper geocodes.

3.1 Using Data Integration Rules

The functionality to use the geocoordinates provided by Salesforce via data integration rules for your records to be mapped in tourManager24 is selected by default. In order to take advantage of the automatic cleaning and geocoding you first have to set up clean rules in your Org. Please notice that you don't need a Data.com license to use this feature.

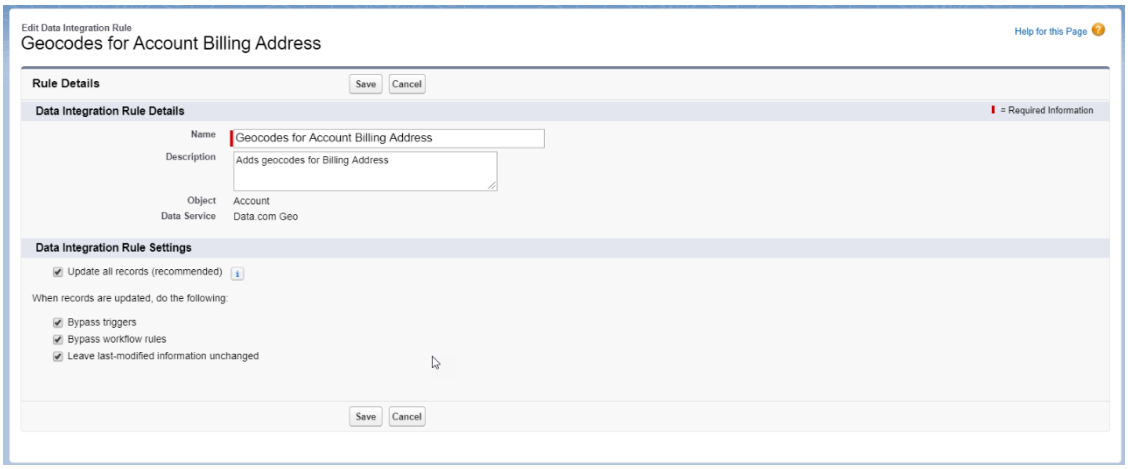
3.1.1 Set up Data.com Clean Rules

To set up Clean Rules, go to Setup → Data Integration Rules. You will find a list of available Rules such as for Account Billing Address, Account Shipping Address, Contact Mailing Address and Lead Address.

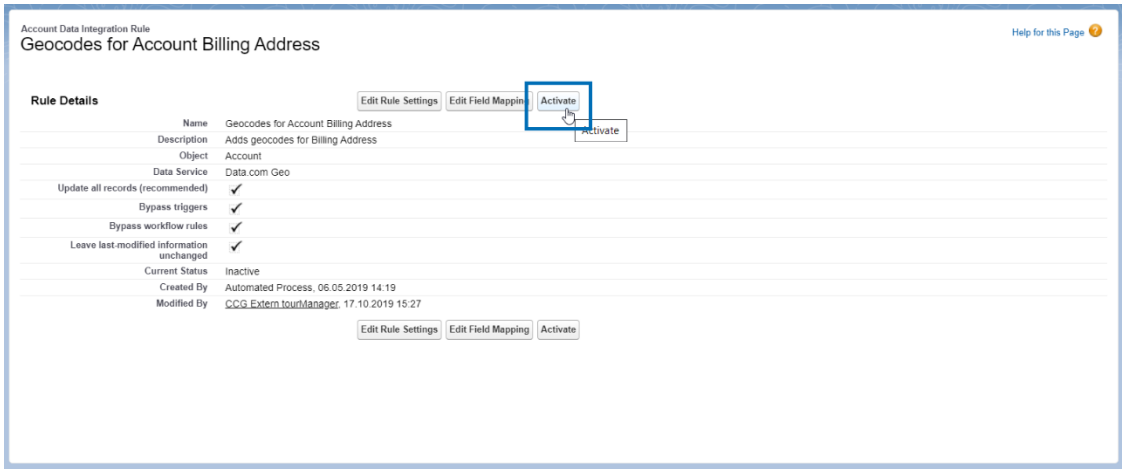


In the column Current Status, you can see which Data Integration Rule is active and which isn't.

You can take a look at these settings to find out whether a Rule is active or not.

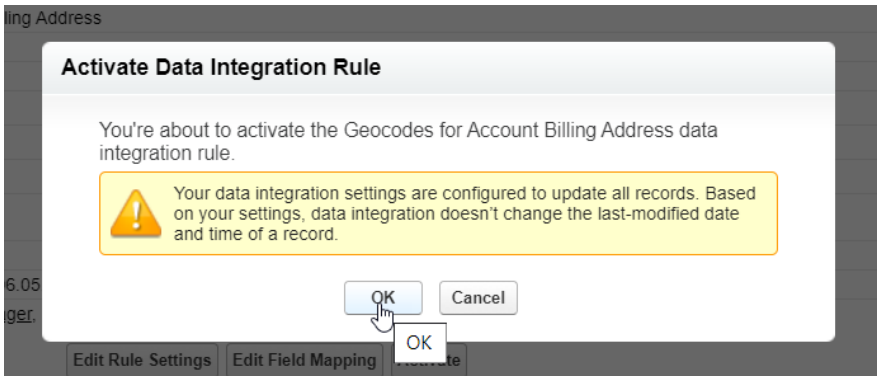


After adjusting the Rule Settings to your preferences, click Save.



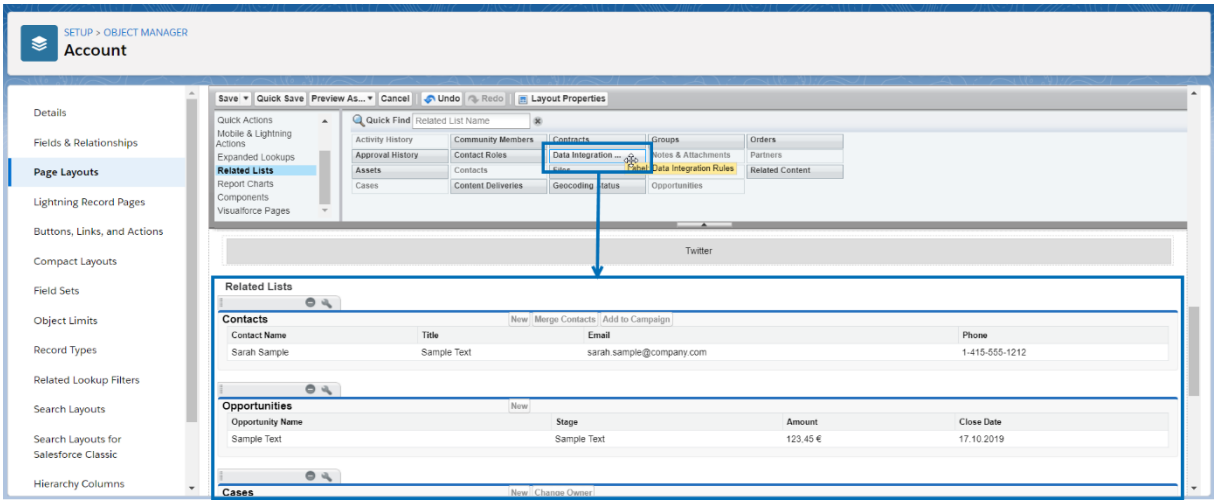
In the next step you need to activate the Rule.

Finally, please confirm to enable the Rule.



3.1.2 Monitor the Status

You can monitor the Status of your records by adding the related list “Data Integration Rules” to your Page Layout.



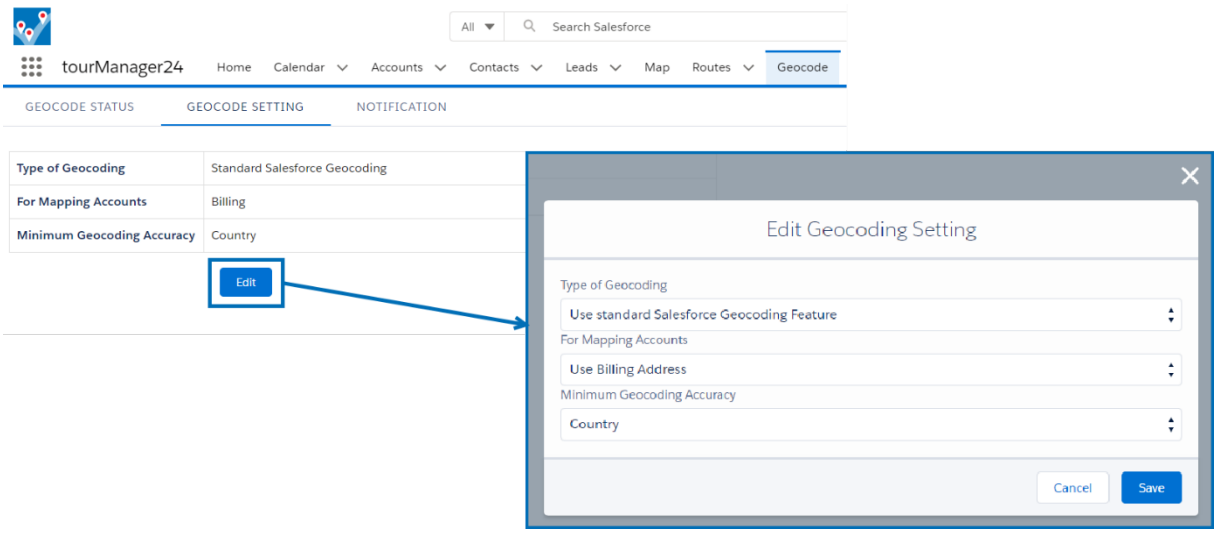
> Please be aware that this related list can be seen only in the Salesforce Classic user interface. So, when you want to verify a record has been geocoded, please switch to Salesforce Classic and open the record there.

More information on Data Integration Rules can be found on

- Documentation by Salesforce
- Geocode Data Integration Rules
- Considerations for Setting Up Geocode Data Integration Rules
- Full Guide Implement Data.com Clean (Winter ’17)

3.1.3 Set up using Data Integration Rules in tourManager24

To set up Salesforce Geocoding in tourManager24, go to the Geocode tab and select Use standard Salesforce Geocoding Feature.

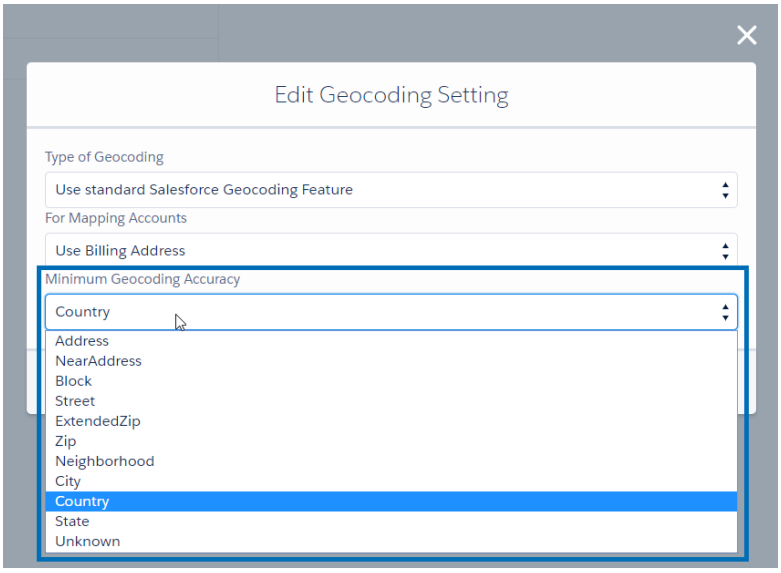


When you click “Edit” you can select whether to use the Shipping Address or Billing Address for showing your Accounts on map.

After you have set your preferences, click the “Save” button on top of the page.

3.1.4 Defining minimum Geocode Accuracy for Search Results

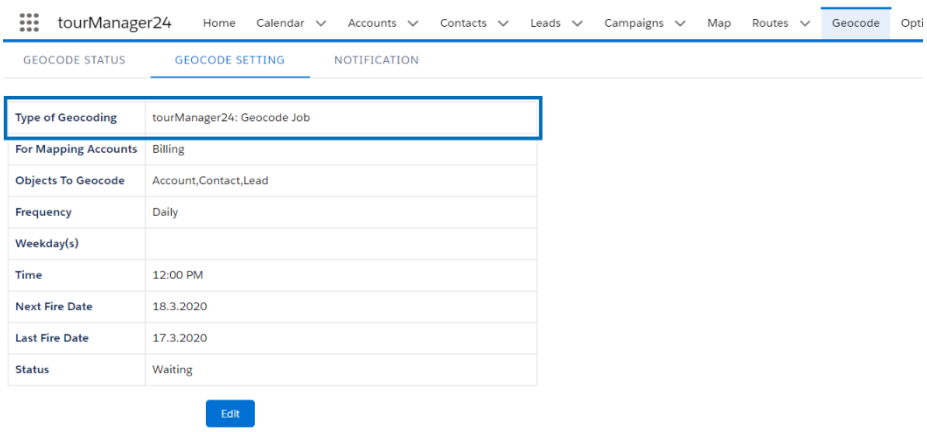
Another feature when selecting Salesforce geocoding is that you can set the minimum accuracy for items to be displayed as a search result.



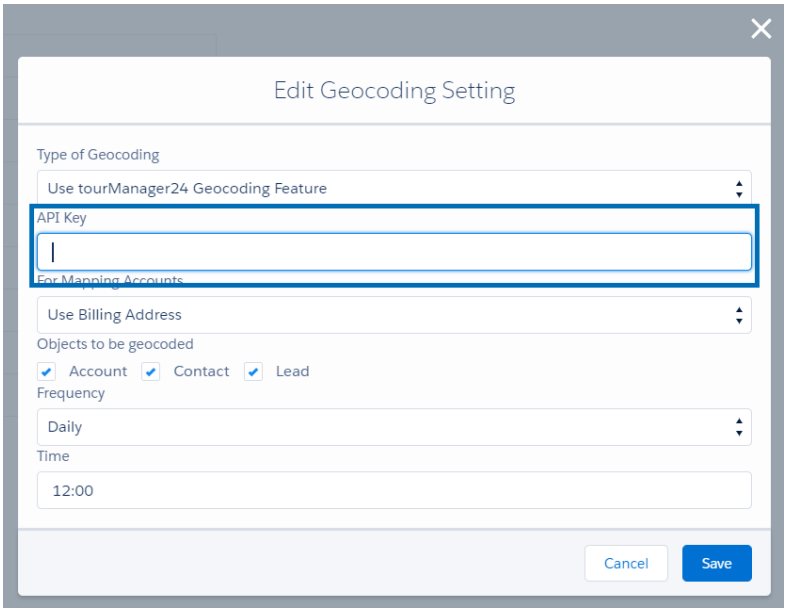
> When you click “Show on Map” on a record with an inaccurate geocoding it will be displayed regardless of what you have defined in the Minimum Geocode Accuracy setting.

3.2 Set up tourManager24 Geocoding

Per default, the Standard Salesforce Geocoding is set up. But the tourManager24 geocoding can be chosen upon first installation of the app and any time after under the Geocode App in Geocode Setting.



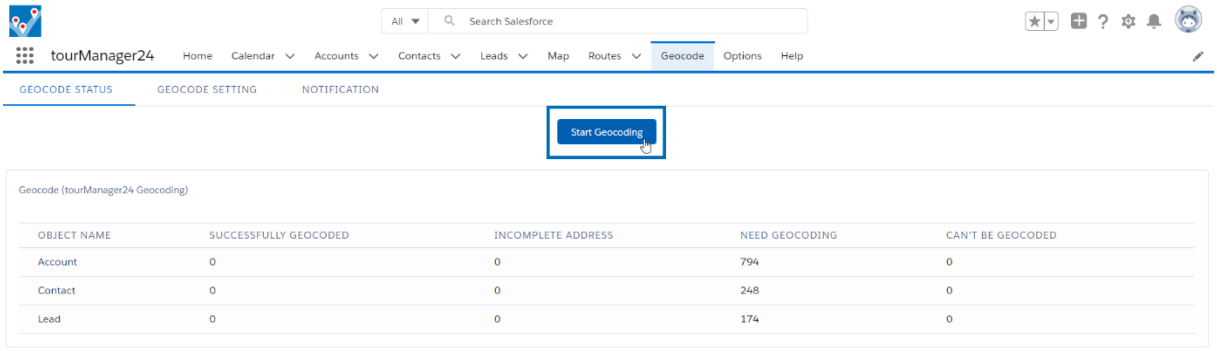
If you choose tourManager24 geocoding, you must enter your own API Key in one additional field.



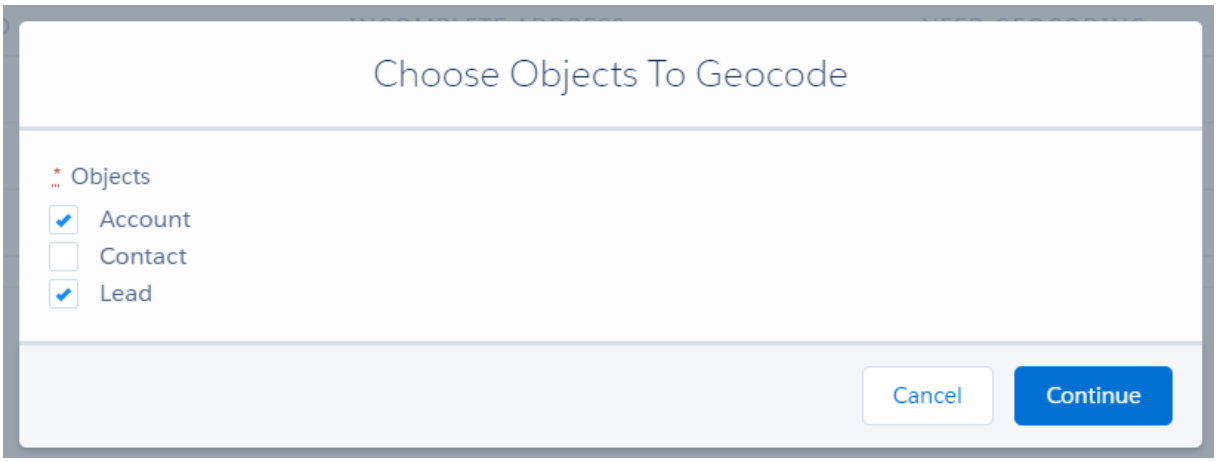
The credentials can be requested from Google. Please read through our Admin Guide detailed information how to do this.

> In order to use the tourManager24 geocoding you have to trigger the first geocoding of your records manually.

To do so, go to the subtab Geocode Status in the Geocode tab and click the **"Start Geocoding"** button.



Within the next window, you'll be asked to choose which objects you want to geocode data of. If you want to geocode records all three objects just check all boxes.



While the geocoding process is running the button will change its label to Geocoding in Progress. Leaving this tab while the geocoding process is running and even logging out of your org will not interrupt the process.

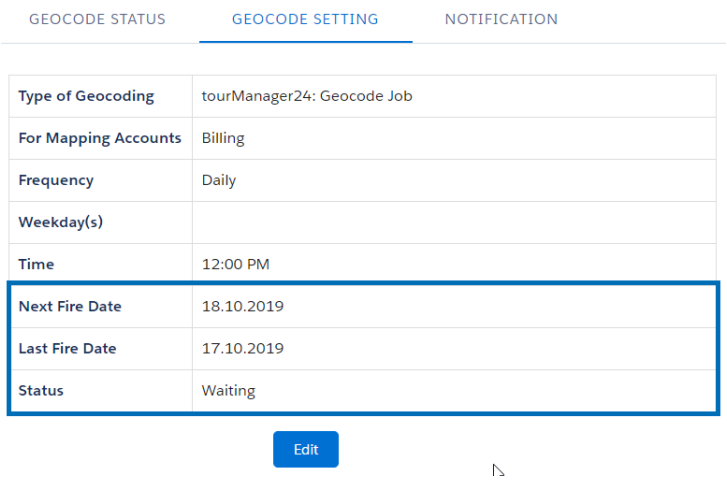
> This process might take several hours if you have a huge amount of data which needs to be geocoded.

3.2.1 Schedule tourManager24 Geocoding

You can schedule the geocoding process to run on a daily, weekly or monthly basis at a certain time. Also, you can schedule it to run on any combination of days.

> Please note that the geocoding job is running on every first day of each month if you choose to run it monthly.

To schedule a tourManager24 geocoding job, open the **Geocode** tab within the tourManager24 app. In the subtab **Geocode Setting** you will find the *option Use tourManager24 Geocoding Feature*. This section also contains information when the



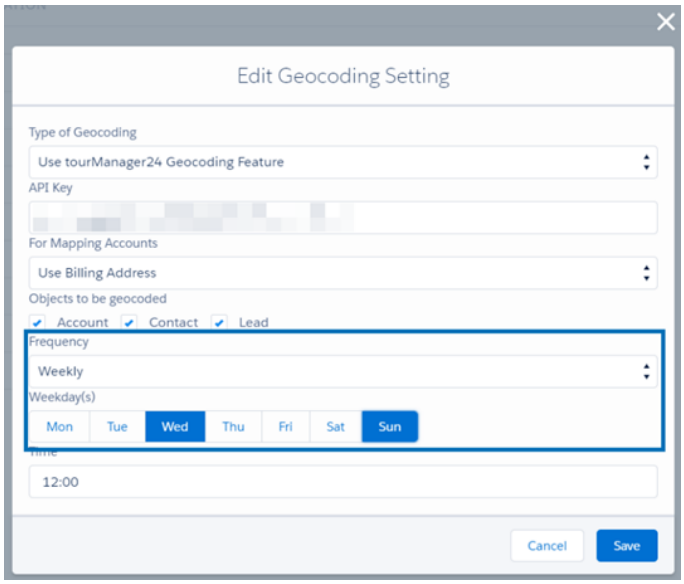
geocoding process was performed, when it will be performed next and whether it is in progress or waiting for the next time to run.

Schedule tourManager24 Geocoding job on a frequent basis

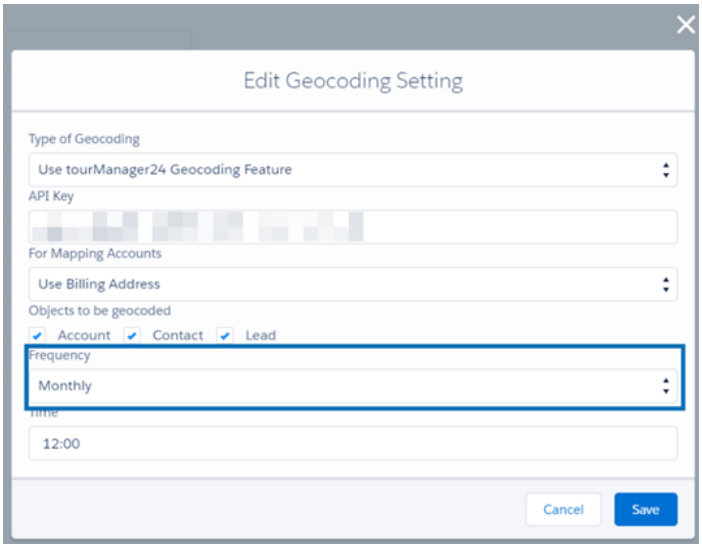
> This is only available when using tourManager24 Geocoding not when using Standard Salesforce Geocoding.

You can setup it up to run on daily, on weekly or on monthly basis. To schedule tourManager24 geocoding on weekly base set the Frequency to Weekly.

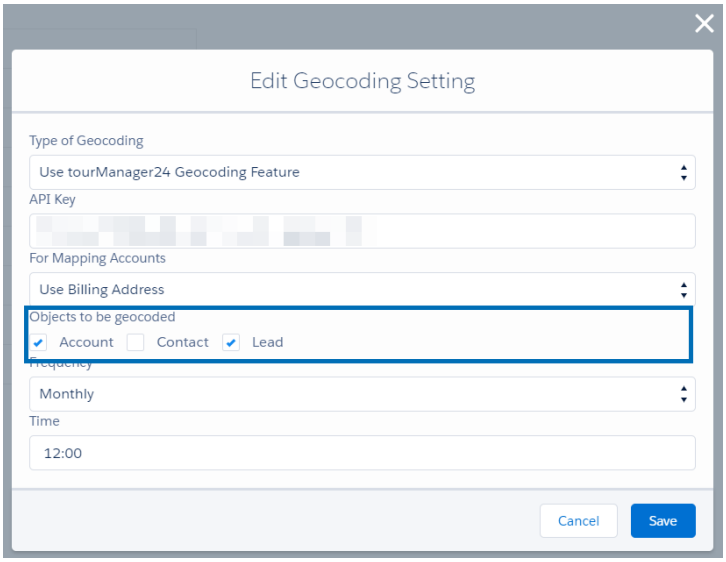
Then click on the day(s) in the week you want the geocoding process to be run. Afterwards set your Preferred Start Time. You can enter the time via manual input or click on the suggested time.



Then click the Save.



In order to schedule the job on a monthly basis just choose Monthly under Frequency. Enter a time which fits best and confirm your input with Save.



Since the Release 6.1 you're also allowed to choose the object which should be geocoded while the job is running. Just check the box of the object you want to geocode.

3.2.2 Monitor your Geocode result

Email

After your records are geocoded you will be informed via email that the process has been completed. This email also contains a link to your Salesforce geocode page.

Additionally, you'll get an email if there occurred errors while the geocoding process because of required fields or active Validation Rules. The email contains a link to a report where you can get detailed information about the geocoding errors.

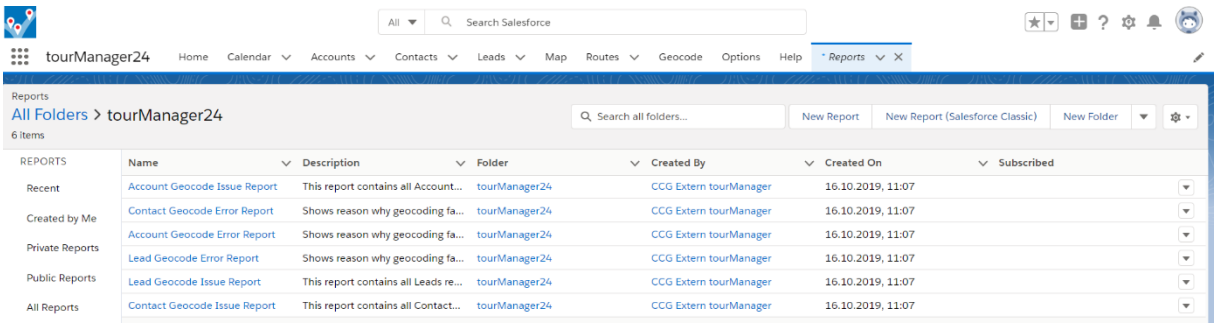
Geocode Status

On the **Geocode** tab you can always see an overview (see screenshot above) of the geocoding status of your Accounts, Contacts and Leads. This status is automatically updated if new records are created in your org.

> This view is only available when using tourManager24 Geocoding not when using Standard Salesforce Geocoding.

Predefined Reports

For a detailed overview on which exact record could not be geocoded, as well as the respective reason, you will find a predefined report for each object (Account, Contact, Lead) in the Reports Folder "tourManager24 Reports".



The “Account Geocode Report” provides details on geocoding issues of accounts, the “Contact Geocode Report” on geocoding issues of contacts and the “Lead Geocode Report” on geocoding issues of leads.

The “Account Geocode Error Report” provides details on geocoding issues of accounts if a validation rule or a required field was the reason of the failure, the “Contact Geocode Error Report” provides details on geocoding issues of contacts if a validation rule or a required field was the reason of the failure, the “Lead Geocode Error Report” provides details on geocoding issues of leads if a validation rule or a required field was the reason of the failure.

CONTACT AND SUPPORT

We hope that these release notes are helpful and answer most of your questions. The following documentation is also available for your reference:

Admin Guide

For further information about the installation process including how to set up Clean Rules and Geocoding, please read the tourManager24 Admin Guide.

User Manual

For more detailed information about the tourManager24 app functionalities please read the tourManager24 User Manual.

Support

Please feel free to contact us online for further support, open questions and feedback.

About Us

Cloud Consulting Group – Your partner for Cloud IT!
We live and breathe Salesforce.com. Our service offering includes consulting, implementation, customization, project management, administration and training. If you are looking to transform your business into the cloud and want to unlock the potential of Salesforce.com and others we are excited to take you on this journey.

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