



#### Content

Feature Overview	3
Features	3
1 Start Mapping	3
1.1 Start mapping from the "Map" tab	3
1.2 Start mapping from Account/Contact/Lead Records	5
1.3 Start mapping from a List View	5
2 Performing the Find Nearby! Search	6
2.1 Set Search Parameters	6
2.2 Select Objects and add Filters	7
2.3 Save search Criteria	10
2.4 Start the search	11
3 Search Results and little Helpers	12
3.1 List View below the map	13
3.2 New Search	14
3.3 Add custom location to man	14

3.4 Highlight a Location	15
4 Routing	16
4.1 Add to Route	16
Via Info Window	16
Via List View	17
Via Drag-and-Drop	17
4.2 Arrange a Route	18
4.3 Rearrange a Route	18
4.4 Remove single locations from a Route	19
4.5 Remove all locations from Route	19
4.6 Save Route and create Events	20
Calendar Entry (Events)	22
4.7 Viewing and printing driving instructions	23
4.8 Sending a Route via Email	24
5 Access saved Routes	26
5.1 Access via Routes tab	26
5.2 Access via Calendar	27
6 Other Functionalities	28
6.1 Create Event for a single Location	28
6.2 Export Search Results	29
6.3 Add Leads & Contacts to a Campaign	29
6.4 Google Maps Functionalities	30
Contact And Support	32
Installation Guide	32
Admin Guide	32
Support	32
About Us	32
Contact	32

## **FEATURE OVERVIEW**

The application tourManager24 is a mapping tool providing planning and scheduling solutions for your field staff. tourManager24 enables you to plot multiple objects by using Google Maps visualizations. It is designed for international usage.

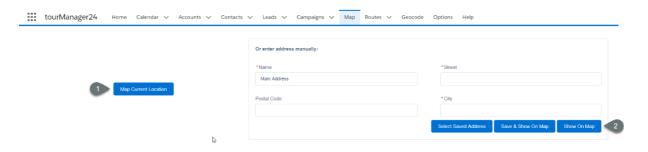
#### **Features**

- Geocode Accounts, Contacts, Leads (via Data.com geocode clean rules or Google Maps API)
- Monitor Geocode Status
- Map Accounts, Contacts, Leads
- Map List Views: Accounts, Contacts, Leads, Opportunities and Cases
- Add custom locations to map (current/manual input)
- Find Nearby Search (Proximity Search)
- Customizable Filter criteria for Search
- Save your Filter criteria for reuse
- Arrange Routes, rearrange Routes
- Save Routes and create associated Events
- Edit saved Routes
- Get detailed driving instructions
- Send routing information via email
- Create events for a single record right within the app
- CSV export of search results
- Google Maps Visualizations and Functionalities

## 1 START MAPPING

## 1.1 Start mapping from the "Map" tab

From the Map tab you can access tourManager24 by automatic A-GPS location detection (1) or manual input (2).



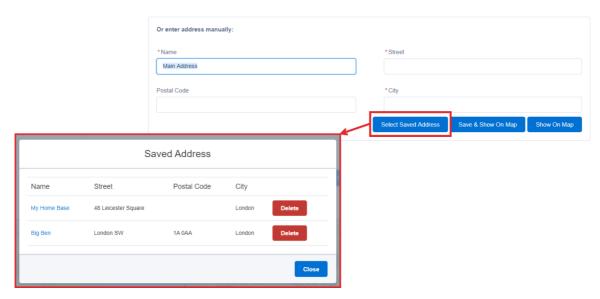
When clicking Map Current Location you will be asked to allow tourManager24 to access your current location via browser. Confirm this request in order to use this feature.

When you decide to manually enter an address and map it then you've got the chance to save this address for later use. Therefore, click the button Save & Show On Map".

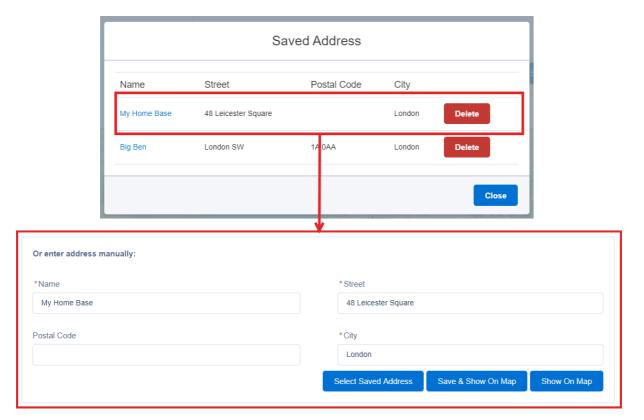
Or enter address manually:	
*Name	*Street
Main Address	
Postal Code	*City
	Select Saved Address Save & Show On Map Show On Map

To be able to better differentiate the stored addresses from each other, it will help to give each of them a unique and meaningful name.

In order to reuse your saved address, click on the button "Select Saved Address". You'll find a list of all your stored addresses.



Just click on the name of one of them and the address fields are filled automatically with saved information.



# 1.2 Start mapping from Account/Contact/Lead Records

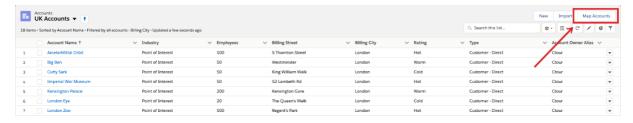
On Account, Contact or Lead records you will find a Show on Map button. Click this button in order to map the record.



## 1.3 Start mapping from a List View

By creating and using list views on Accounts, Contacts, Leads, Opportunities and Cases you can easily sort and display relevant information. Those list views can be mapped with tourManager24 app.

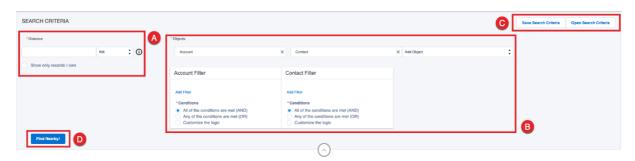
To do so for Accounts, select your list, then select the records you want to be displayed on a map and click the "Map Accounts" button.



You can do the same with Contacts, Leads, Opportunity and Cases. If you don't see the Map Contacts, Map Leads, Map Opportunities, Map Cases (Account) or Map Cases (Contact) in your list views ask your Admin to add it.

# **2 PERFORMING THE FIND NEARBY! SEARCH**

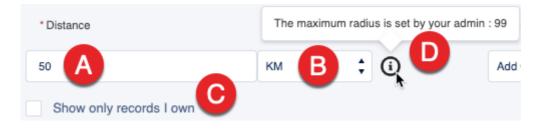
After opening the tourManager24 app you can define your search criteria.



Here you can set the search parameters (A), select the objects you want to search for and add filter criteria for each object to refine your search (B). You can also save your search criteria (C) for later or open previously saved search criteria. After setting your search criteria start the search by clicking the Find Nearby! button (D).

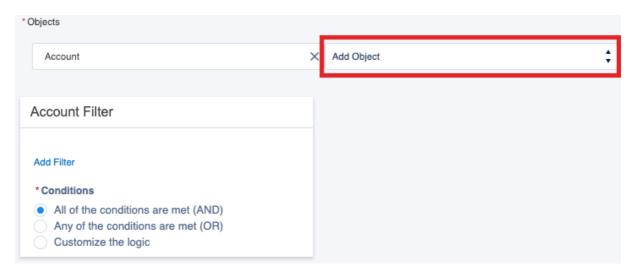
#### 2.1 Set Search Parameters

With Search Parameters you can define your search radius from your initial location (A). Entering a search radius is a prerequisite to conduct a search. In the distance section you define the distance unit, which can be KM or Miles (B). Furthermore, you can choose to only search for records you own (C). The maximum radius you can enter you can see by hovering over the information sign (D). This maximum search radius is defined by your Admin. Ask him if you need to enter a wider distance than the allowed one.

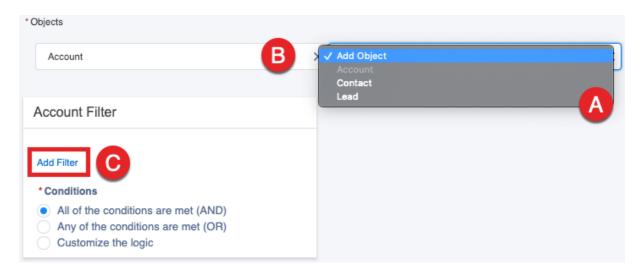


# 2.2 Select Objects and add Filters

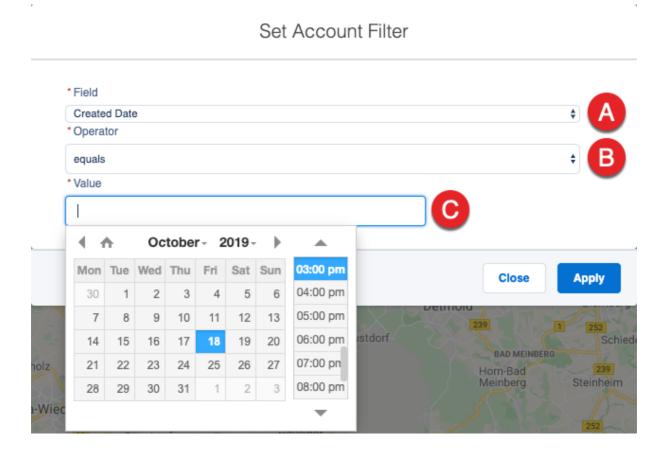
Click on the dropdown field "Add Object" to choose which objects you want to include in your Find Nearby! search.



You can include Accounts, Contacts and Leads in your search (A). To remove an object click the X (B). To refine your search add one or more filters for each object (C).

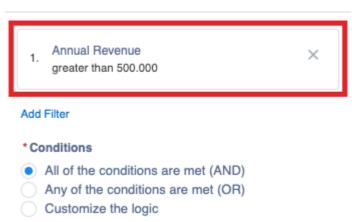


Select the field you want to filter for (A), the operator (B) and add the value (C). Depending on the field type you have selected you can either type in a value or select from a dropdown etc. When you are done hit "Apply" to add the filter to the object.



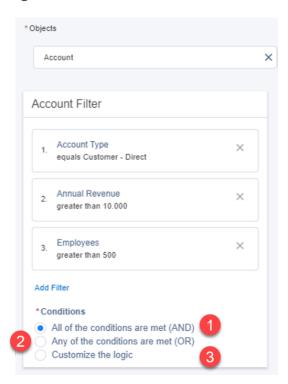
You can also edit a filter simply by clicking on it.

#### Account Filter



When you use more than one criterion you've got three possibilities to combine the different criteria.

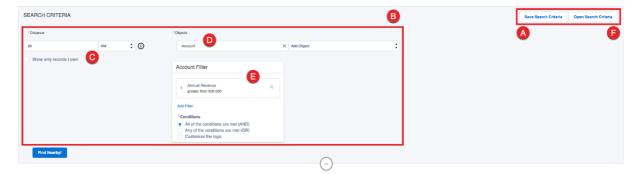
- (1) All of the conditions are met (AND) Choosing this possibility means that the mapped records must meet all filter criteria.
- (2) Any of the conditions are met (OR) Choosing this possibility means that at the mapped records must meet at least one of your filter criteria.
- (3) Customize the logic With this third possibility you've got the chance to combine the filter criteria in a custom logic.



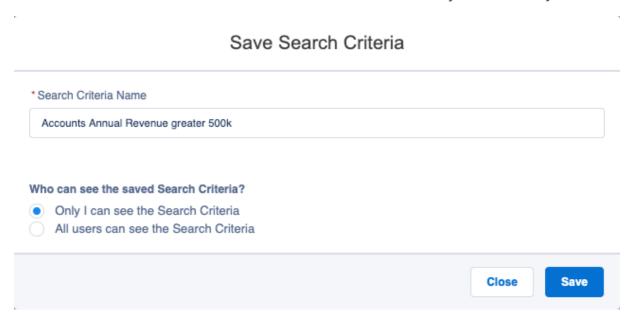
#### 2.3 Save search Criteria

To reuse your defined filter criteria, you can save it for later use by clicking "Save Search Criteria" (A). This will include everything (B) you have defined.

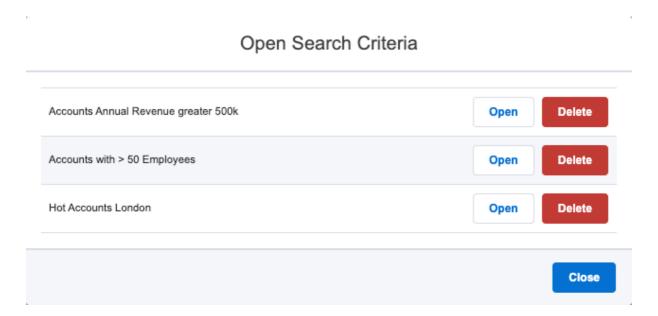
- parameters (search radius, distance unit, Show only records I own) (C)
- selected objects (D)
- filters (E)



Enter a name for your Search Criteria and click "Save". Additionally, you can decide if you want to make the search criteria available for other users or if it's just visible for you.

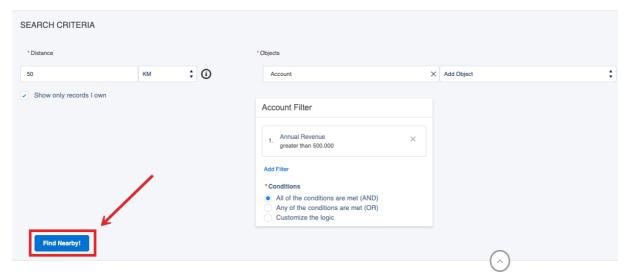


To open previously saved Search Criteria, click "Open Search Criteria" (F) and click Open next to the criteria you want to use. To cancel hit Close. To delete an existing criterion just click Delete next to the desired criteria.



#### 2.4 Start the search

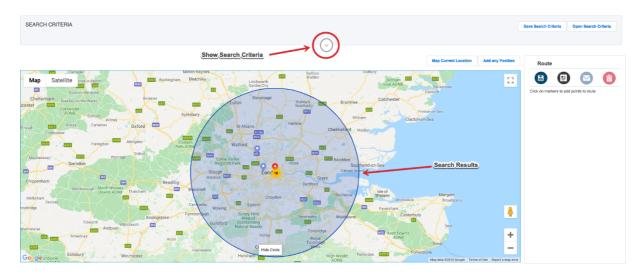
Click "Find Nearby!" to perform the search.



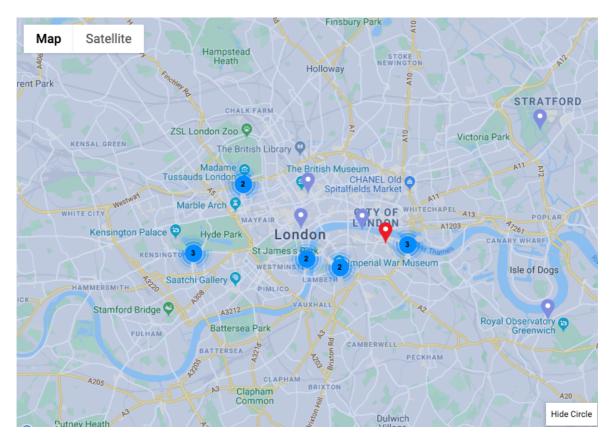
You will then be forwarded to the search results.

# **3 SEARCH RESULTS AND LITTLE HELPERS**

Your search results are displayed on the map as well as in a list view below the map. To show the Search Criteria and edit them click on the down arrow to expand the section. The markers on the map are displayed in the color you are used to from using Lightning Design.

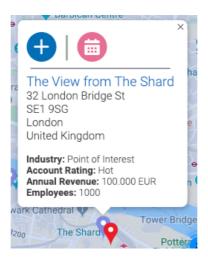


If there were many records on the map found at once, these will be combined in a group. The circle shows the number of records within the group. As soon as you click on one of these markers, you zoom into the map and the individual records are displayed as separate markers on the map.



By clicking on a location's marker, you can get further information.

The additionally to the address shown fields can be edited by your Admin. He can choose to show up to 5 fields in the info window.

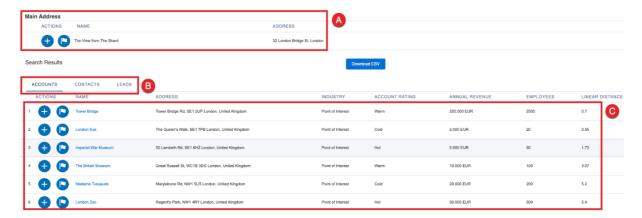


# 3.1 List View below the map

In addition to the markers on the map you find a list view with your search results below the map. First you see the Main Address (A). This is either your current position or any valid address. This depends on what you mapped at the beginning of your search (see chapter 1 Start Mapping).

Next, you find a subtabs (B) for each object you selected in the Search Criteria (see chapter 2.2 Select Objects and Add Filters). Click on the according subtab to display the mapped records for the object.

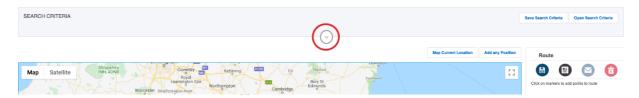
Below you see the mapped records (C) of the object selected (B).



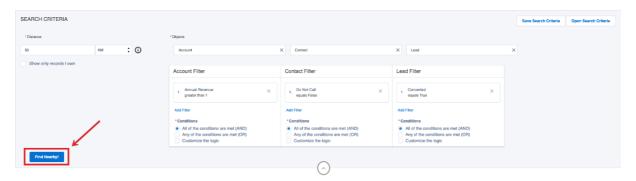
The columns shown in the list view are depending on the fields your Admin chose for the info window. There is again the possibility to add up to five fields. Ask your Admin for further information.

#### 3.2 New Search

In case you want to adjust or change your search criteria after the result has been created, expand the Search Criteria section by clicking on the down arrow and start editing.

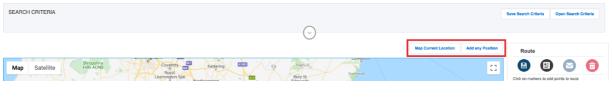


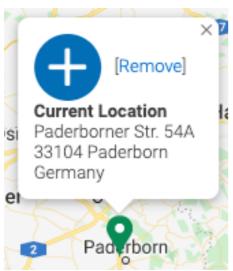
In order to show your changes, click "Find Nearby!" again.



# 3.3 Add custom location to map

You can also add your current address to the map. To map your current location click Map Current Location. You will be asked to grant access to tourManager24 to your browser's geolocation functionality if that wasn't confirmed before.

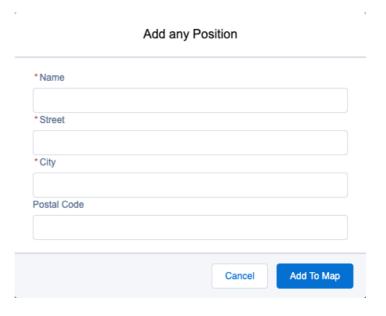


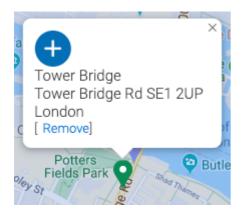


Your current position will be mapped with a green marker.

You can also add any valid address to the map. To do so, click "Add any Position". A new dialogue will open.

When entering an address via manual input the fields Name, Street and City are required. After setting those values click "Add To Map".





The location will then be added to the map highlighted with a red marker.

You can only add one custom location to the map. So when the initial location was set via manual input or any location was added before search you cannot add a location via this functionality.

# 3.4 Highlight a Location

You can use the items in the list view below the map to highlight locations on the map.

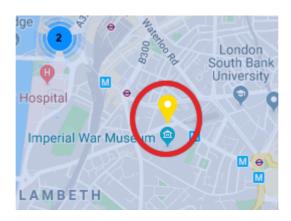
(1) Click on the list item's marker



(2) The icon gets highlighted in the list view...



(3) ... and on the map.

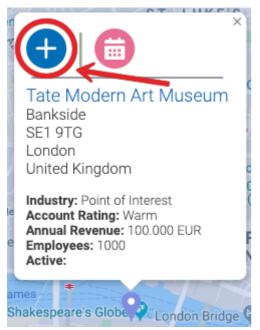


Click the icon again to remove the highlighting.

# **4 ROUTING**

#### 4.1 Add to Route

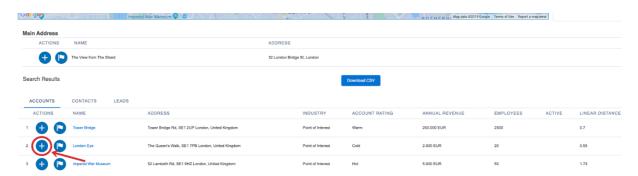
#### **Via Info Window**



Click on the marker of the location you want in order to add it to the route. An info window will then show details of this location. Click on the "Add To Route" icon.

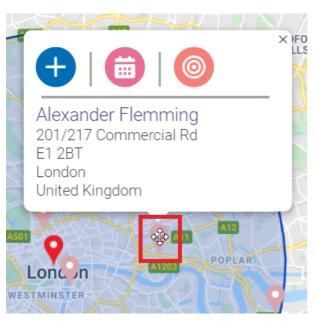
#### **Via List View**

Scroll down to the list view. Click the Add to Route icon next to the location you want to add to the route.



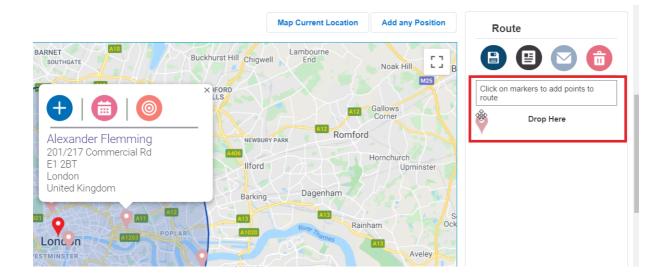
#### **Via Drag-and-Drop**

You can also add points to the Route via grabbing them in the map and dragging the marker to the Route panel.



Click on the marker of the record. The Info Window will open. At the same time you curser will become a cross. This signalizes that you can now drop the marker.

In the Route panel is now shown where to drag the marker. Just drag it to the marked space and let it go. A new point is now added to the Route.



# 4.2 Arrange a Route

In the Route menu all locations you added to the route are displayed in the order they have been selected.



# 4.3 Rearrange a Route

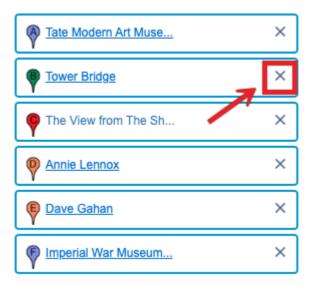
Your route can be rearranged very easily via drag and drop.

Click on a location in the Route menu and hold it. Afterwards, drag it to the desired position. Your route will be rearranged automatically on the map as well.



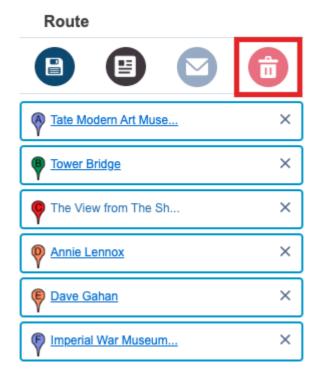
# 4.4 Remove single locations from a Route

To remove a single location from your route, click on the X next to the location in the Route menu.



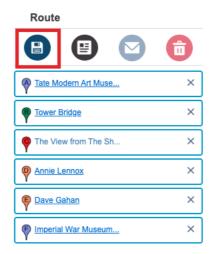
## 4.5 Remove all locations from Route

You can clear a Route with one click. Click the Clear Route icon in the Route menu. All locations are removed from the Route.



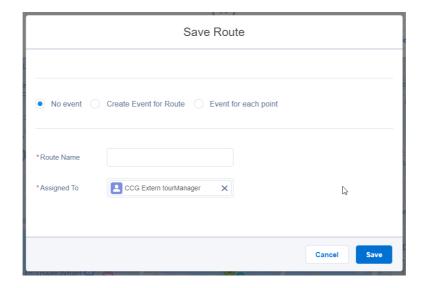
## 4.6 Save Route and create Events

Click on the Save Route icon.



Decide whether you would like to

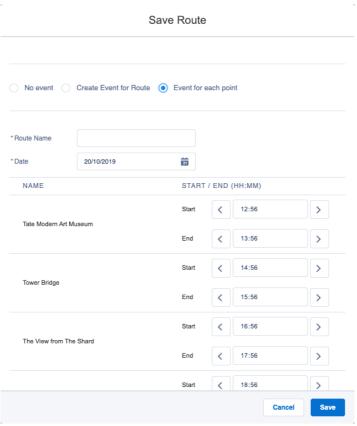
(1) save the route without creating an event (No event)



(2) save the route and create an event for the whole route in your calendar (Create Event for Route)

Save Route					
No event	Create Event for Route	Event for each	h point		
*Route Name					
* Date	20/10/2019	>			
* End  * Assigned To	Select User	<b>Q</b>			
				Cancel	Save

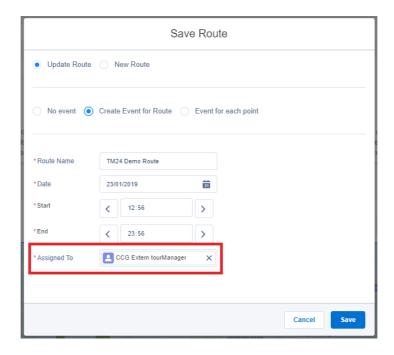
(3) save the route and create an event for each point on your route (Event for each point) in your calendar



Then click the "Save" button to confirm your input. You can close the dialogue without saving a route by click on "Cancel".

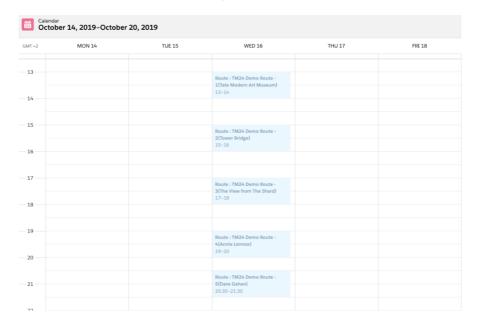
You can also create an event for a single location of your search results without leaving tourManager24. See "6.1 Create Events for a single location".

Whenever you create a Route, no matter whether it's woth or without Events, you've got the possibility to assign it to another user.



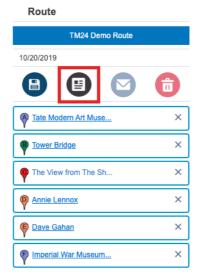
#### **Calendar Entry (Events)**

Once you have created a calendar entry when saving a route you can access it via the calendar view on your Salesforce home page.

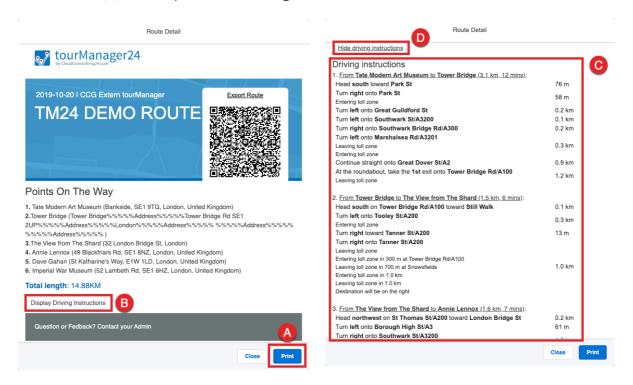


## 4.7 Viewing and printing driving instructions

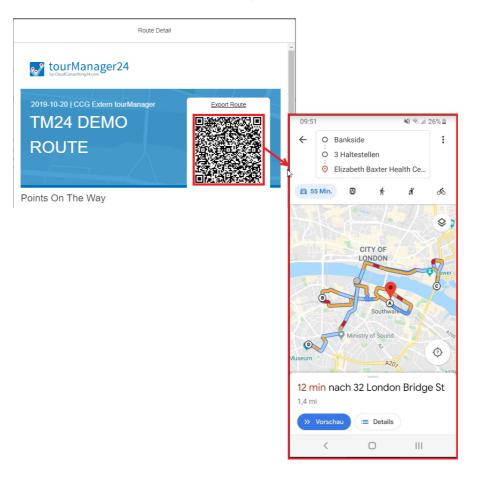
By clicking on the "Show Details" icon in the Route menu a window will open and display the POINTS ON THE WAY.



In the Route Details, you will find the points on the way in the order you have arranged the route. You can print the details (A). When you click on Display driving instructions (B) you will find the driving instructions (C) for the points on the way. Click Hide driving instructions (D) to collapse the details again.



Additionally, you've got the chance to scan the QR Code in the header with your mobile device. Your Route will be opened directly in Google Maps.

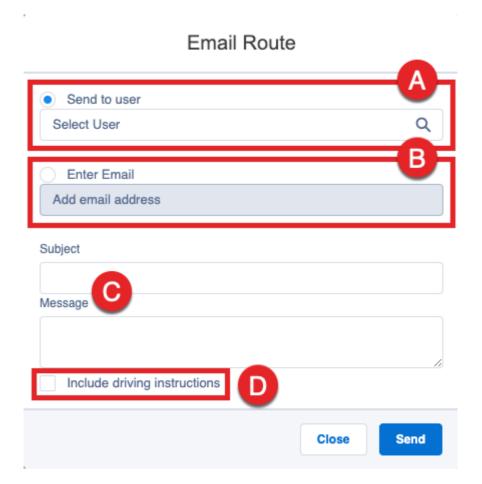


# 4.8 Sending a Route via Email

To send a route via email click Send Route via Email.

# TM24 Demo Route 10/20/2019 Tate Modern Art Muse... Tower Bridge X The View from The Sh... Annie Lennox Dave Gahan X

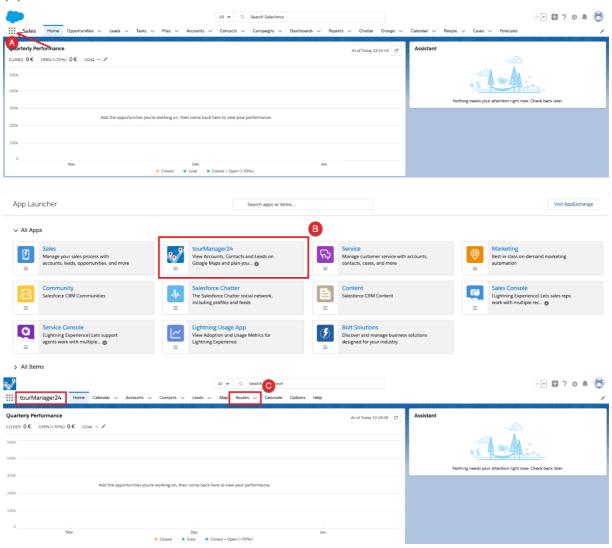
You have two options to send a Route. You can choose to send to a Salesforce user (A) or enter any email address (B) you want to send the Route to. Optionally add a subject line and a message for the recipient (C). Choose whether to include driving instructions or not (D).



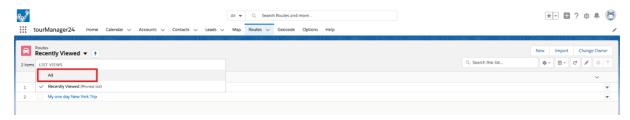
# **5 ACCESS SAVED ROUTES**

#### 5.1 Access via Routes tab

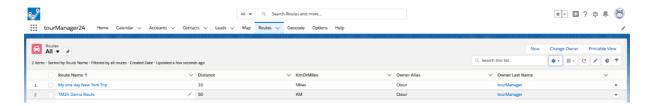
In case the Routes tab is not visible in your navigation bar yet, go to the App Launcher (A) in the Salesforce navigation bar. Then select tourManager24 (B) and go to the Routes tab (C).



In the list view you will find Recently Viewed Routes.

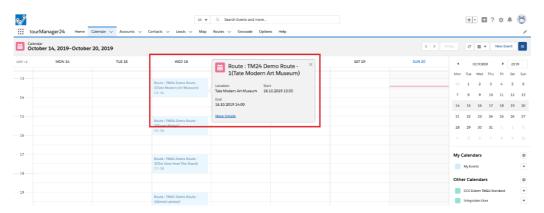


To show all Routes select the list view ALL. All your saved Routes are listed with name and date. Click on the Route Name to access the desired route.

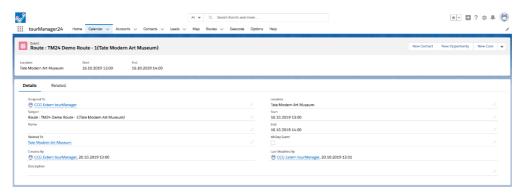


#### 5.2 Access via Calendar

If you created a calendar entry when saving the route, you can access it via the calendar view.



Click on the event to see details.

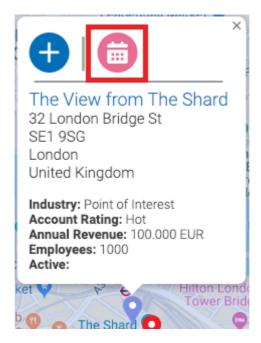


Optionally add further details to the event.

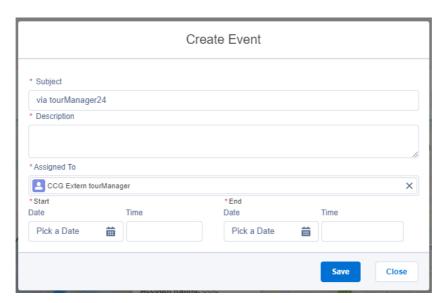
# **6 OTHER FUNCTIONALITIES**

# 6.1 Create Event for a single Location

You can create events for single locations within tourManager24 app after you performed a "FIND NEARBY!" search. To create an event, click the on Create Event icon in the info window.

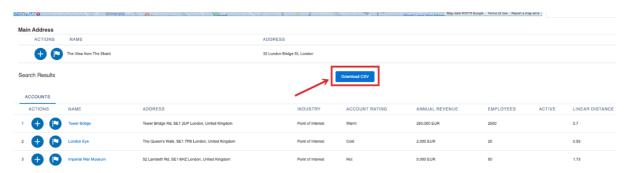


A dialogue will open in which you can enter the data for your event. The fields Subject, Date, Start and End are required.



## 6.2 Export Search Results

You can download the Search Results as a .csv file. The Download CSV button is located within the Search Results section right below the map.



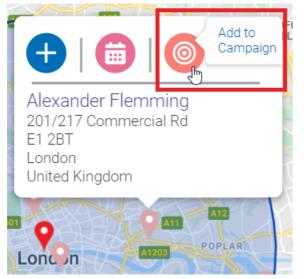
The page on which you can download your .csv file will then open in a new tab. Click "Download CSV (Account)" to download the accounts, "Download CSV (Contact)" to download contacts and "Download CSV (Lead)" to download leads.

#### Search Result

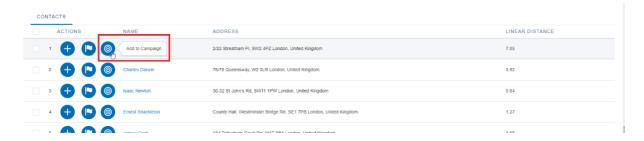
Download CSV (Account) Download CSV (Contact) Download CSV (Lead)

## 6.3 Add Leads & Contacts to a Campaign

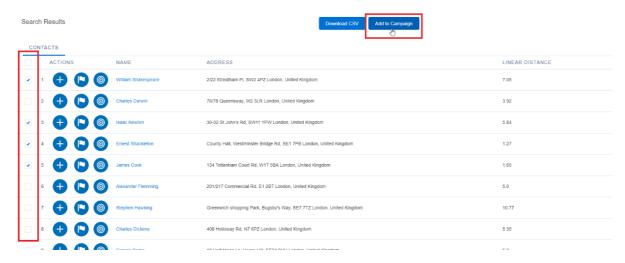
Especially for Contacts and Leads tourManager24 gives you the possibility to add them to a Campaign right from the map.



You can do this via the information window. Just open it and click the "Add to Campaign" button. Another way to add Leads or Contacts to a Campaign is to scroll down to the List View below the map. There, you can either add the records one by one by clicking the "Add to Campaign" button.



Or you can choose either all Contacts or Leads to add by ticking the checkbox within the headline of the list view or only some special records by ticking the box in front of ach record. Afterwards click the button "Add to Campaign" above the list view.



You can't add Contacts or Leads to a Campaign twice. When you do so, there's an error message shown say that the Campaign Member already exists.

# 6.4 Google Maps Functionalities

tourManager24 also supports some Google Maps functionalities. You can:

- (A) Zoom in and zoom out the map
- (B) Access Google Street View

Drag the yellow manikin onto the map and drop it at a location to access Google Street View (if available)

(C) Change map type

Show map only or show in Satellite mode.



## **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:

#### **Installation Guide**

For further information about the installation process including how to set up Clean Rules and Geocoding, please read the <u>tourManager24 Installation Guide</u>.

#### **Admin Guide**

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

#### **Support**

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

#### **About Us**

Cloud Consulting Group – Your partner for Cloud IT!
We live and breathe Salesforce. 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 and others we are excited to take you on this journey.

#### **Contact**

Cloud Consulting Group GmbH Barckhausstraße 2 60325 Frankfurt am Main Phone (nat): 0800 181 4054 Phone (int): +49 69 96 75 86 29



