



**21CRM Global Atlas  
Version 4.0  
for Sage CRM**

**Administrator Guide**

## 21CRM Global Atlas – Users Guide

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## Who Should Read This Guide

This guide is for CRM administrators and consultants. We assume that you have experience using:

- ACCPAC CRM 5.8+
- MS SQL Server 2000+ SP4
- Experience implementing and customizing CRM

## How this guide is organized

You must read the “End-User License Agreement For 21CRM Systems Inc. Software” in the pages that follow. Acceptance of this agreement is required in order to install and use the software.

This guide is designed as a step-by-step manual allowing you to complete an installation and configuration of the 21CRM Global Atlas Extension.

This will be accomplished using a series of screen captures and text that should approximate the environment you experience in your installation.

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## Part 1: Installation

### CRM Prerequisites

The 21CRM CRM Extensions have several prerequisites that must be satisfied prior to attempting installation. Not completing any one of these steps may result in a failed installation.

- Users of CRM Global Atlas must have a public internet connection. Simply having local network rights, with no public internet access is insufficient for CRM Global Atlas to run.
- CRM 5.8B or higher installed
- MS SQL Server 2000SP4 +, or SQL Server 2005 installed
- CRM must be completely configured and functioning
- SQL Server tools installed on the CRM server
- Exclusive access to CRM and the SQL Server database (no other users are online)
- Microsoft .NET Framework 2.0 installed and configured on CRM Server
- Microsoft Visual J# 1.1  
<http://microsoft.com/downloads/details.aspx?FamilyId=E3CF70A9-84CA-4FEA-9E7D-7D674D2C7CA1&displaylang=en>

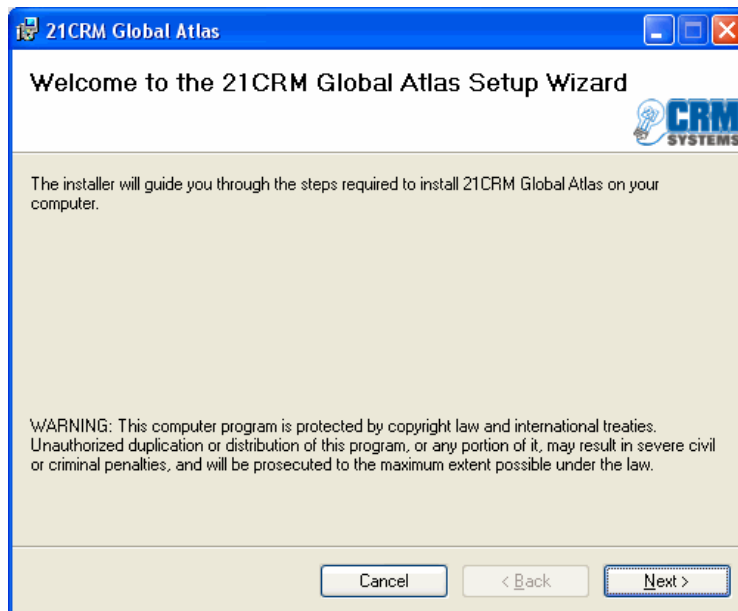
CRM is now prepared for the installation process.

## Step 1 – Application Installation

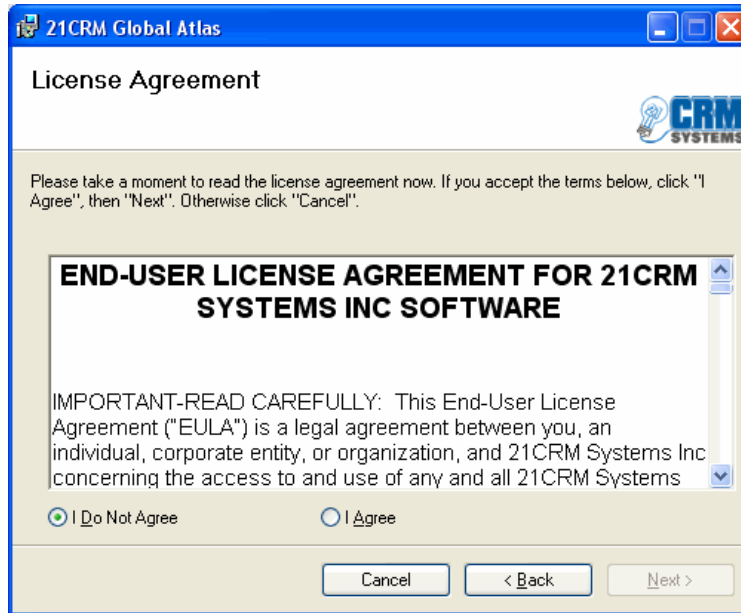
To begin the installation process, execute **21CRMGlobalAtlas40Setup.EXE**. This should be done while logged onto the server on which Sage CRM is installed on. This is a server-side installation.

If you do not have the install file, it can be downloaded from our website at <http://www.21crmsystems.com/software/globalatlas>. The file will download as a ZIP, and will need to be extracted.

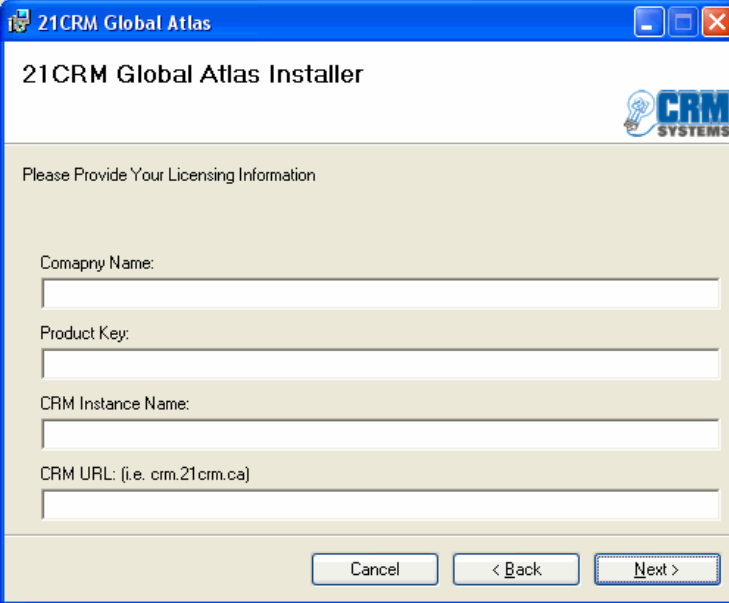
This setup will display the following window:



Click "Next" to continue with the installation.



Once you have read the licensing agreement select the "I Agree" option and click "Next" to continue.



21CRM Global Atlas Installer

Please Provide Your Licensing Information

Company Name:

Product Key:

CRM Instance Name:

CRM URL: (i.e. crm.21crm.ca)

Cancel < Back Next >

Enter the licensing information in the textboxes provided.

Ensure that all information is entered as provided.

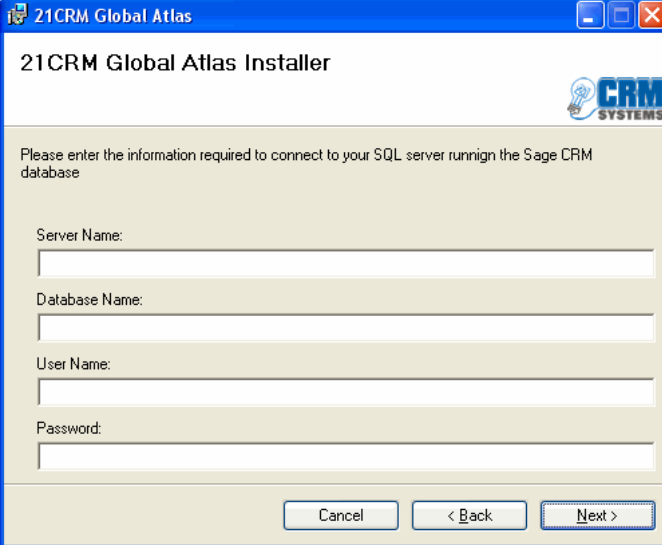
Type in the exact company name you provided when purchasing/download demoing the software.

Product keys **are** case sensitive.

The CRM instance name is the name of the CRM installation. This can be found in the URL to CRM (i.e. <http://localhost/CRM/> the instance would be CRM).

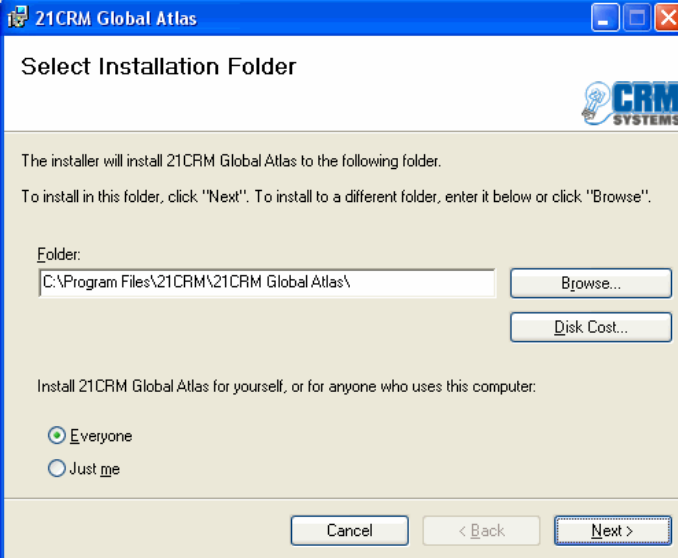
The CRM URL is simple the root URL of CRM for example the URL for <http://localhost/CRM/> would be localhost/crm.

Once all textboxes have been completed, click “Next” to continue with the installation.



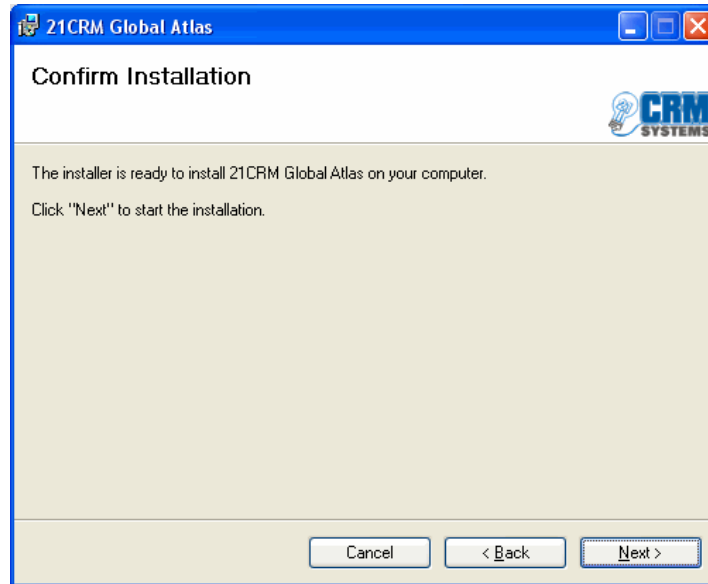
The screenshot shows the '21CRM Global Atlas Installer' window. The title bar reads '21CRM Global Atlas'. The main title is '21CRM Global Atlas Installer'. Below the title is the CRM SYSTEMS logo. The text says: 'Please enter the information required to connect to your SQL server runnign the Sage CRM database'. There are four input fields: 'Server Name:', 'Database Name:', 'User Name:', and 'Password:'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

Enter the credentials needed to connect to the Microsoft SQL Server that is hosting the Sage CRM database. Click “Next” to continue.

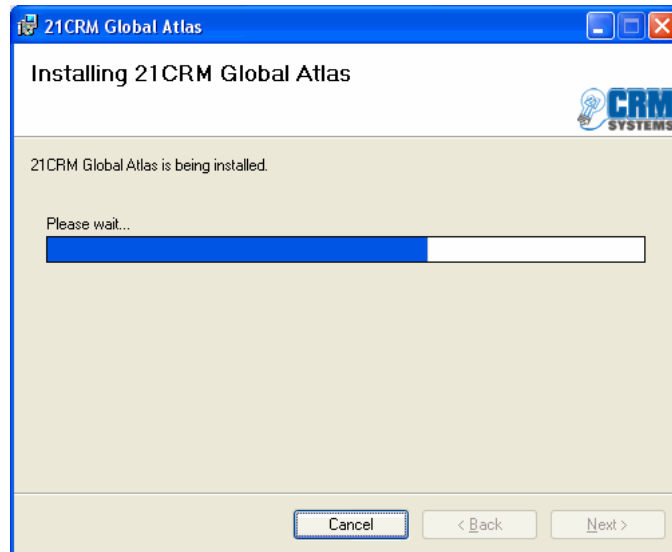


The screenshot shows the '21CRM Global Atlas Installer' window. The title bar reads '21CRM Global Atlas'. The main title is 'Select Installation Folder'. Below the title is the CRM SYSTEMS logo. The text says: 'The installer will install 21CRM Global Atlas to the following folder. To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse"'. There is a 'Folder:' label and a text box containing 'C:\Program Files\21CRM\21CRM Global Atlas\'. To the right of the text box are two buttons: 'Browse...' and 'Disk Cost...'. Below this, there is text: 'Install 21CRM Global Atlas for yourself, or for anyone who uses this computer:'. There are two radio buttons: 'Everyone' (which is selected) and 'Just me'. At the bottom, there are three buttons: 'Cancel', '< Back', and 'Next >'.

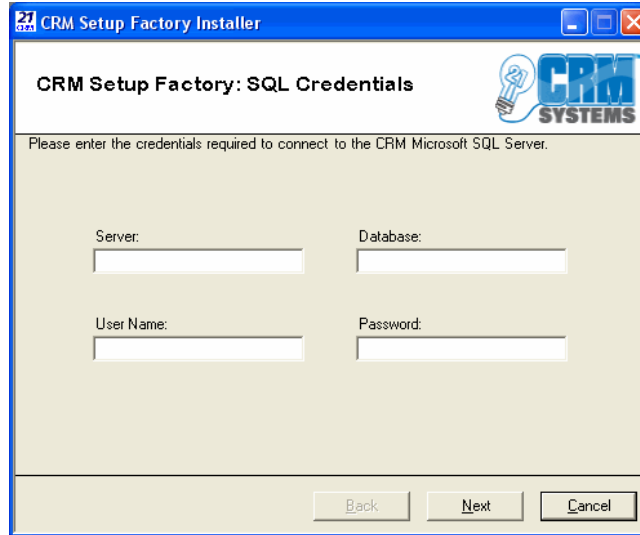
Enter the correct installation path. The default is recommended but may vary on the server. Ensure that “Everyone” is selected in the radio buttons. Otherwise, CRM Global Atlas will not function correctly. Click Next to continue with the installation.



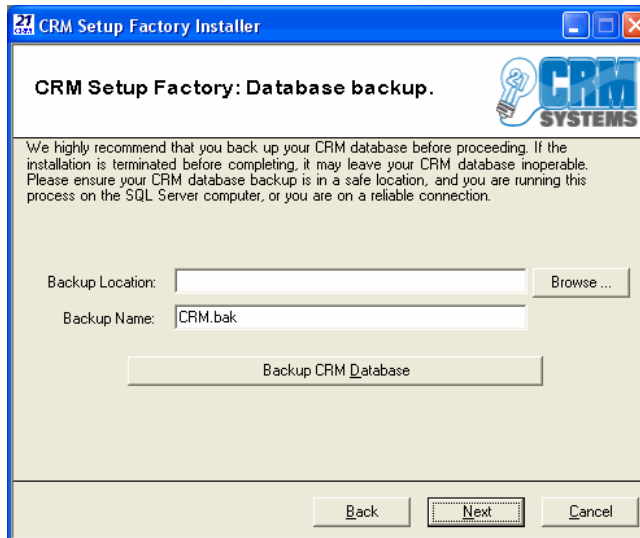
The installer now has enough information to begin the installation process. Click Next to begin the installation.



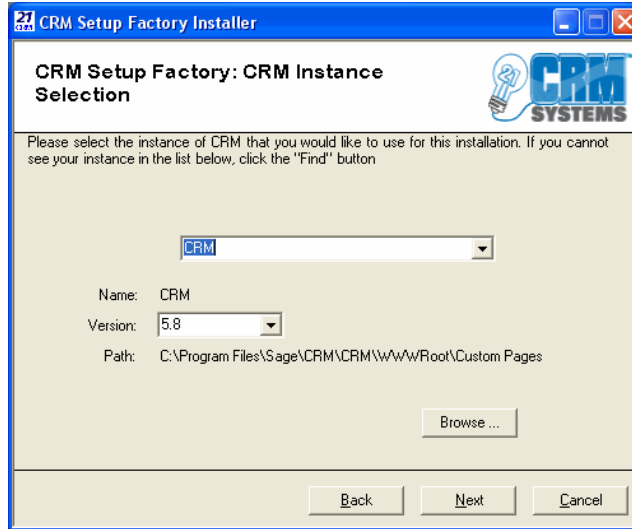
This window illustrates the status of the installation. About half-way through the installation you will be presented with CRM Setup Factory to complete the installation.



This window is asking for the SQL Credentials required to connect to the CRM database on a SQL Server. Once you have entered the credentials required to connect to the SQL Server click next and you will be presented with the following screen.



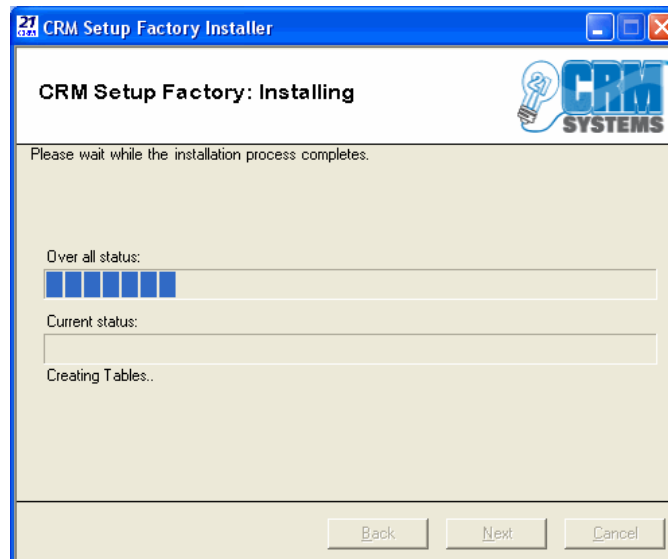
This window is prompting you to backup your CRM database, this is not required but is **highly** recommended. When you are ready to continue click next and you will be presented with the following screen.



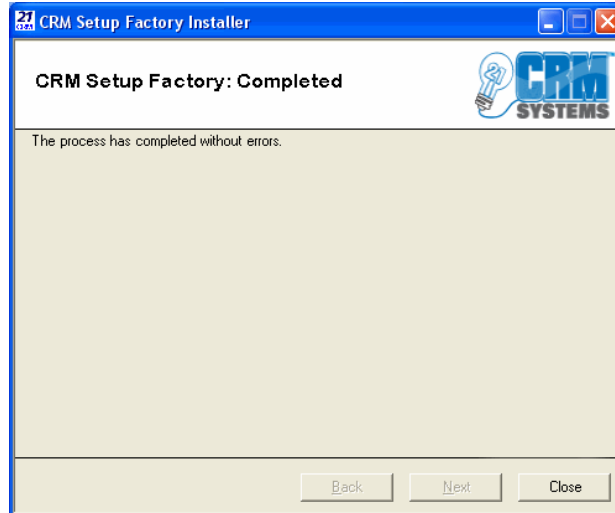
This window is asking for the local instance of CRM you want to install 21CRM Global Atlas in, simply select the desired instance from the dropdown list.

**Note:** If the setup factory application cannot determine the installed CRM instances, use the Find button and navigate to the CUSTOMPAGES folder of the CRM instance. Ensure when using Find that you select the CUSTOMPAGES folder and not the root CRM folder. Doing so will cause the installation to fail.

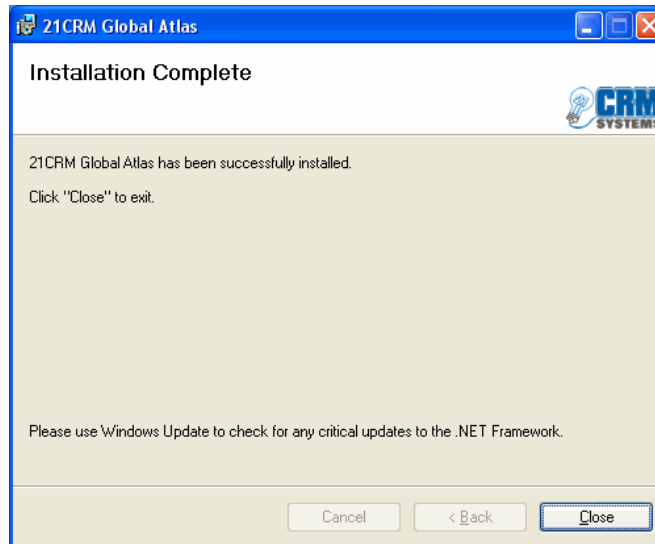
Once you have selected the appropriate instance of CRM click "Next" and you will be presented with the following screen.



This window simple illustrates the installation process. Once the installation process has completed you will be presented with the following window.



This window is informing you that the installation has completed. If any errors occurred during the installation there will be a message in red indicating that an error has occurred along with a button labeled "View Errors", clicking this button will display the errors that occurred. Click the close button to display the following window indicating that the installation of 21CRM Global Atlas has completed.



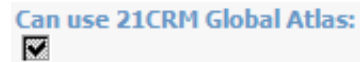
**Note:** The web server should be reset at this point. Execute an "IISRESET" statement at the command prompt, or restart the IIS Admin service in the Windows Services control panel. This will ensure CRM is fully aware of the installation changes made.

## Step 2 – Configuration

The next step is to configure CRM to allow users to access CRM Global Atlas. This is done through the standard CRM screens.

### Configure Users

In the user administration area of CRM, navigate to the user Global Atlas will be activated and set the “Can Use Global Atlas” to checked.



### Configuring Pin Descriptions

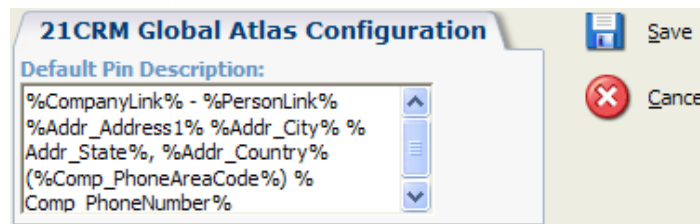
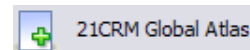
21CRM Global Atlas gives you the ability to customize the descriptions that will be displayed when the user hovers over one of their pins. This can be done with a global default or each user can customize the text that is displayed.

### Global Default Description

To configure the default description for all new locations that are added to the users My Locations section of CRM, navigate to the 21CRM Admin section in the administration section of CRM.



Once you have navigated to the 21CRM Administration section select the 21CRM Global Atlas button to open the 21CRM Global Atlas configuration screen.



The only configuration setting for global atlas is the Default Pin Description; this is the text that will be displayed in the pin description by default. There are 2 special merge fields that are evaluated when the pin is originally added to the users locations:

- %CompanyLink%  
This will resolve to a link that can be clicked by the user to open the company summary page for company associated with the location.

- %PersonLink%  
This will resolve to a link that can be clicked by the user to open the company summary page for the company associated with the location.

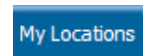
However you are not limited to these fields, the pin description is also evaluated at runtime to merge values from the vMapLocations view (which can be found on the C21\_Map\_Locations entity in CRM), which can be customized to fill any needs you may have. The only rule for this view is that it must join to the Company, Address and C21\_Map\_Location tables.

Any field on the vMapLocations view is available for merging for example if you wanted to put the “Comp\_Status” field in the description you would add % Comp\_Status% to the description and save.

All merge fields must be surrounded with % signs.

### Individual User Descriptions

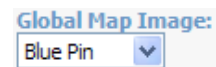
For a user to set a custom description for one of their locations, they need to navigate to the My Locations section of CRM and click the name of the location that they would like to edit the description for.



From the Location Details page the user can click edit to enter edit mode and enter a new description for the location. The same rules that apply for the default description apply for a user description.

### Configuring Company Pins

Each company in the system can be configured to use a specific pin when it is displayed on the users map. This setting can be found on the company summary screen. The default values for this field are Blue Pin, Green Pin and Orange Pin.



You select any of the preconfigured pins from this list, if you want to added your own custom pins refer to that section of this document.

### Adding Custom Pins

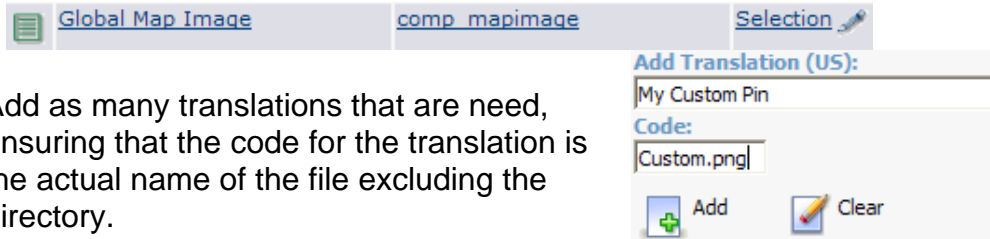
You can add as many custom pins to the Global Map Image options list as are required by your business specifications. This is accomplished through a two step process;

**1. Adding the image to the web server**

In order to use a custom image for a pin on the map you must first upload it to the CRM server. The pin images are stored under the CustomPages\21CRM\Maps\img directory of the CRM installation CustomPages directory.

**2. Adding the option to the list**

Once the image has been added to the web server, all that is left to do is add the option to the list. Simply navigate to the Company entity in CRM and edit the field comp\_mapimage option list by clicking the Selection hyperlink

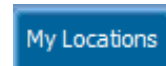


Add as many translations that are need, ensuring that the code for the translation is the actual name of the file excluding the directory.

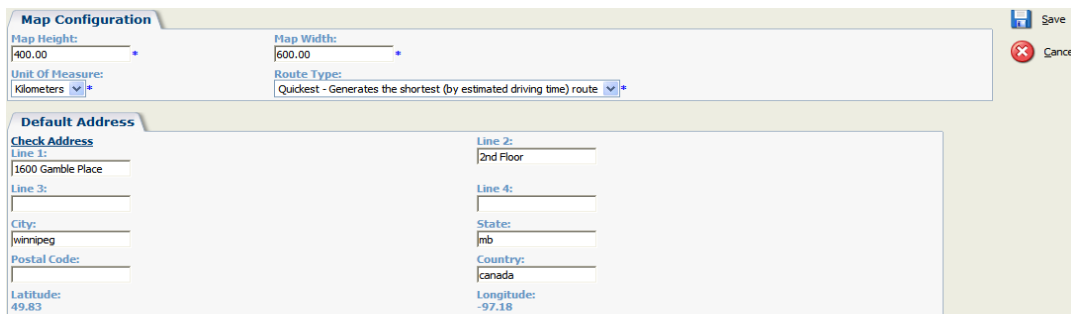
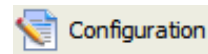
Once you have added all the desired options you can save your changes by clicking the save button on the top left-hand side of the screen

**Configure My Locations**

Before a user can utilize CRM Global Atlas, they must configure the system for use. This is done by going to “My CRM” and clicking on the “My Locations” tab.



The “My Locations” tab normally displays all of the addresses the user has added to their “My Locations”. At this point, this list should be empty. The user should click the “Configuration” button located on the right hand side of the screen. This will take the user to the configuration page, which should be filled out appropriately.



The table below explains the fields on the screen:

### Map Configuration

These settings control how CRM Global Atlas will look and feel.

Map Height	This is the height of the map, in pixels, as it will be displayed.
Map Width	This is the width of the map, in pixels, as it will be displayed.
Unit Of Measure	This is the unit of measure that will be used for distances on the map. Kilometers or Miles.
Route Type	This is the type of route the map will use when getting directions. Shortest Distance, or Shortest Time

### Default Address

Each user has their own “Default Address” that is drawn on the map and can be used as a destination or origin when getting directions. This would normally be the person’s primary business address. In order for the default address to be displayed on the map, the user ***MUST*** click the “Check Address” link to resolve the Latitude/Longitude for the address.

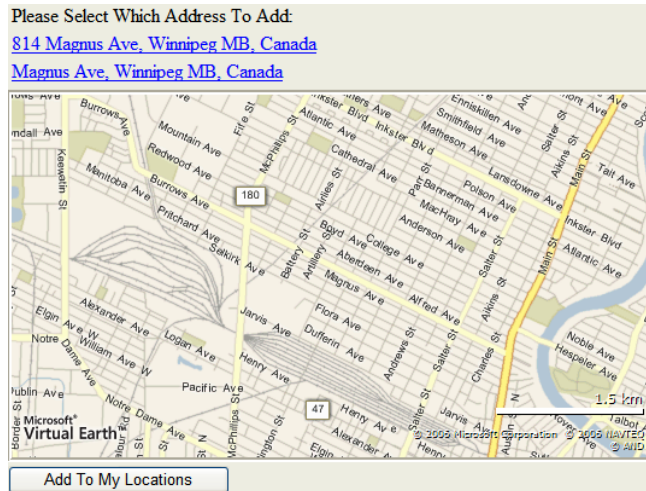
Check Address	This is a link that will get the latitude/longitude of the address. Clicking this link will populate the Latitude/Longitude fields on the page.
Line1	Line 1 of the default address
Line2	Line 2 of the default address
Line3	Line 3 of the default address
Line4	Line 4 of the default address
City	The city of the default address
State	The state/province of the default address
Postal Code	The zip / postal code of the default address
Country	The country of the default address
Latitude (read only)	This is the latitude of the default address, which is populated using the Check Address link.
Longitude (read only)	This is the longitude of the default address, which is populated using the Check Address link.

Once the user is satisfied with the default settings, CRM Global Atlas is configured and ready to use.

## Part 2: Utilization

### Adding Locations

Each user in CRM has their own private map to which they can add and remove locations. To add a location to their map, the user needs to navigate to the address record to be added and click the “Add To My Locations” button. Clicking this button will open the following window:



If there is more than one possible match for the address, CRM Global Atlas will generate a list of possible matches for the address. Once the address has been selected, a new pin will be added to the current map allowing the user to ensure that the pin is in the correct location. When the user is satisfied with the location of the pin they can click “Add To My Locations” to close the window and continue working with CRM. The address will now appear on the user’s “My Locations” tab in My CRM.

### My Locations

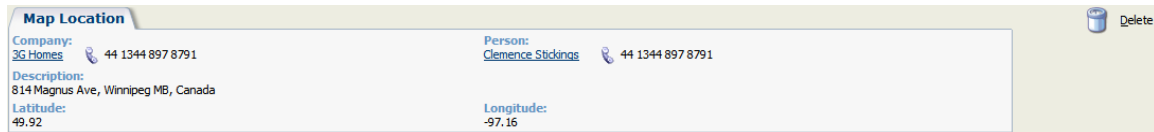
The “My Locations” section of CRM will allow the user to view the locations they have pinned to their map as well as remove locations. To access the “My Locations” section of CRM the user simply needs to navigate to the “My Locations” tab from the “My CRM” context, which will display the following screen:

3 Records Found, Page 1 of 1					
Name	Description	Company	Person	Latitude	Longitude
<a href="#">3G Homes - Clemence Stickings</a>	814 Magnus Ave, Winnipeg MB, Canada	3G Homes	<a href="#">Clemence Stickings</a>	49.92	-97.16
<a href="#">Daily Kansas Nursing - Robert Ramsey</a>	13700 Veterans Memorial Dr, Houston TX, United States	Daily Kansas Nursing	<a href="#">Robert Ramsey</a>	29.98	-95.50
<a href="#">Tax Depository Florida - Steve Goldsworthy</a>	1200 New York Ave Nw, Washington DC, United States	Tax Depository Florida	<a href="#">Steve Goldsworthy</a>	38.90	-77.03

The following table explains the links in the list block illustrated above:

Name	Clicking this link will take the user to the location record allowing the user to remove this location.
Company	Clicking this link will take the user to the summary page for the company associated with this location.
Person	Clicking this link will take the user to the summary page for the person associated with this location.

To delete a location from their map the user simply clicks on the “Name” link which will take them to the following page:



Clicking the delete button will require the user to confirm the deletion then remove the location from the user’s My Locations.

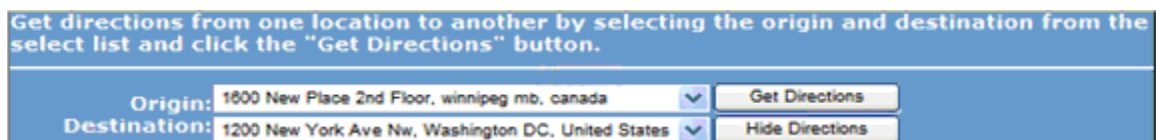
## My Map

To view the map, the user would navigate to the “My Locations” tab and click the “Show Map” button which will display the following page:



Below is a list explaining the buttons on the right-hand side and what they do:

- Show / Hide Directions**  
 This button will display the following section at the bottom of the map:



To get directions, the user needs to select both an origin and a destination. When both have been selected, the user clicks the “Get Directions” button. CRM Global Atlas will then begin looking up directions for the locations selected. When CRM Global Atlas has finished looking for directions it will draw a line on the map to visually illustrate the path, as well as write out the directions below the map.

To hide the select lists, the user needs to click the “Show / Hide Directions” button. This will clear the select lists while leaving the route drawn on the map and the directions written below the map.

To remove the directions from below the map the user needs to click the “Hide Directions” button below the “Get Directions” button.

To remove the route from the map the user needs to click the “Delete Route” button on the right hand side of the map.

- **Show / Hide Find Nearby**

The user can search for information within the existing map view (i.e. Restaurants, Gasoline) by clicking this button, which will display the following section below the map:



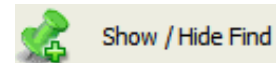
Find information within the existing map view by entering the business name, category, or other item you are trying to find.

What:

Enter the business name, category or any other item you are attempting to find and click the “Find” button. Examples of valid entries are “Caesar’s Palace”, “Restaurants”, “Schools”, “Parking”, etc.

- **Show / Hide Find**

Clicking this button will allow the user to search for a location that is not on their map. The following section will be displayed under the map:



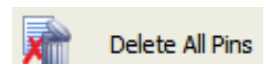
Find a location by entering the address or place name of the area you are trying to find.

What:

The user simply needs to type the address they are looking for in the textbox provided and click Find. The address must be properly formatted i.e. [Street Address],[City],[Province],[Country]

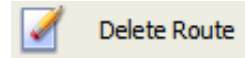
- **Delete All Pins**

Clicking this button will remove all the pins from the map.



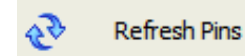
- **Delete Route**

Clicking this button will delete the last route drawn on the map.



- **Refresh Pins**

Clicking this button will reload all the locations that were originally on the map before any searches were performed.



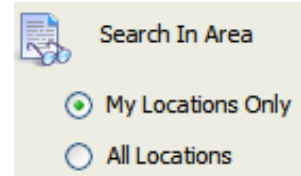
- **Print Map**

Clicking this button will print the current screen.



- **Search in Area**

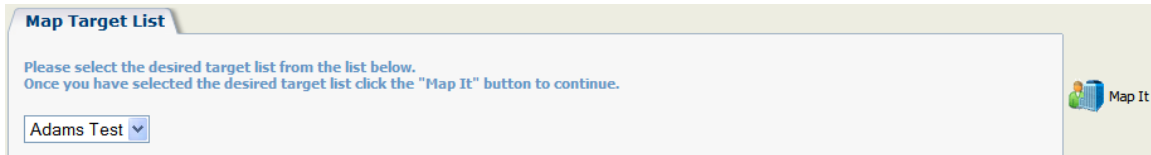
Clicking this button will allow you to draw a box on the map and search either the user's location or locations that were resolved by the CRM Global Atlas Service. The user specifies which locations to search by selecting the appropriate option from below the "Search In Area" button.



To draw the box the user clicks anywhere on the map to identify the top left corner of the box. The user then drags the mouse to the bottom right corner of the box and clicks again. The map will then clear all existing pins and load all the locations in that area into the map. This is useful when trying to identify which of your customers are located in a certain area, for example.

## Target Lists

CRM Global Atlas provides you with the ability to view all the addresses on a specific target list in the system. In order to view the target list mapped out, the target list ***MUST*** include the **addr\_addressid** field of the Address table in the CRM database. To view the target list, the user needs to navigate to the “My Locations” section of CRM and click the “Target List” button which will display the following page:



**Map Target List**

Please select the desired target list from the list below.  
Once you have selected the desired target list click the “Map It” button to continue.

Adams Test ▼

Map It

If there are no target lists in the system that include the addr\_addressid field from the Address table the only available option will indicate this and you will not be able to open the map. If there are target lists in the system that includes the addr\_addressid field from the Address table, the user selects the desired target list from the combo box and clicks “Map It” which displays the map in a new window.

## Find With Global Atlas

CRM Global Atlas also has the ability to allow users to find a company or person’s address in the system without adding the address to their locations. This can be done from the company / person summary screen by clicking on the “Find With Global Atlas” button located in the address block.



## Customization Notes

If you would like to customize the images that CRM Global Atlas uses you can simply replace the corresponding image with the desired image. Below is a list of the images used by CRM Global Atlas and their corresponding uses:

Add-Out.gif Add-Over.gif	These images are used for the “Add To My Locations” button. This button uses a rollover state, so in order to properly replace this image you must replace both files with the desired image.
Find-Out.gif Find-Over.gif	These images are used for the “Find With Global Atlas” button. This button uses a rollover state so in order to properly replace this image you must replace both files with the desired image.
BluePin.png	This image is used to indicate that this pin is one of the users locations.
GreenPin.png	This image is used to indicate that this pin is a location added by the Global Atlas Service (or Global Location).
OrangPin.png	This image is used to indicate that this pin is a search result.

The above images can be found in the CUSTOMPAGES/21CRM/Maps/img/ directory.

If you have inquiries about customization of this, or any of 21CRM Systems’ CRM Extension products, please contact your software provider.

## Known Issues & Troubleshooting

At this time there are no known issues with CRM Global Atlas.

If you experience any issues, please report them to us contacting your software provider, or, if you are a 21CRM Systems partner, by logging into our online self-service support site at <http://www.21crmsystems.com/support> and submitting a case report. Your assistance will help us to improve the software and resolve issues quickly.

For further assistance you can contact us:

21CRM Systems Inc.  
200-1335 Erin Street  
Winnipeg, MB, Canada  
R3E 2S7  
Phone: 1.204.480.9772  
Email: [support@21crmsystems.com](mailto:support@21crmsystems.com)

Online: <http://www.21crmsystems.com>

Electronically submitted support requests generally will be responded to the fastest. Please consider using that option.