tourManager24

ADMIN GUIDE

VERSION 6.1 | MARCH 2020

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1 GEOCODE YOUR DATA

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

Within *tourManager24* you have the choice to either geocode your data with tourManager24 Geocoding or use the standard Salesforce geocoding based on Data.com Clean rules.

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

We recommend using Data.com geocoding if your Salesforce Org has more than 100,000 records (Accounts, Contacts and Leads) to be geocoded, as the tourManager24 Lightning Ready app underlies Google Maps restrictions allowing only 100,000 API calls per day.

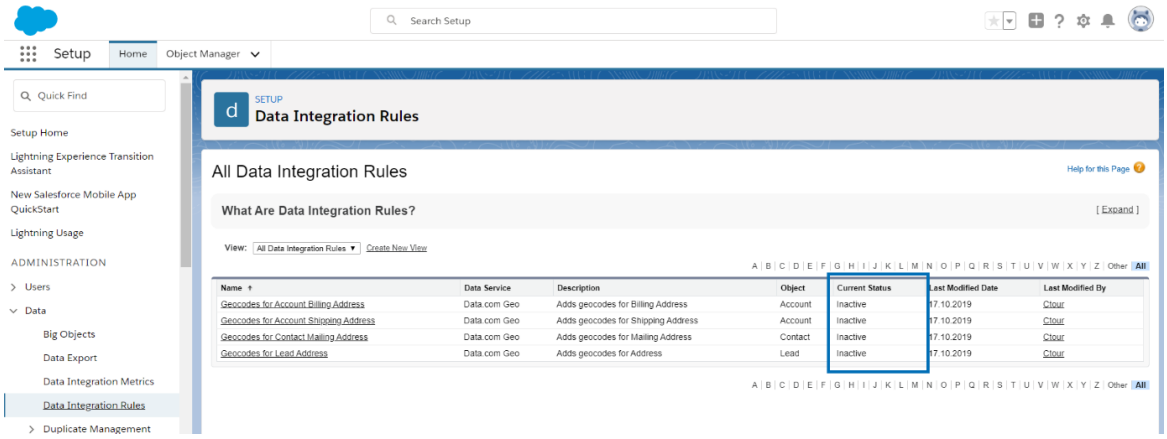
> Our internal tests have shown some inaccuracies of the Standard Salesforce Geocoding feature resulting in several addresses which did not get proper geocodes.

1.1 Using Salesforce Geocoding

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.

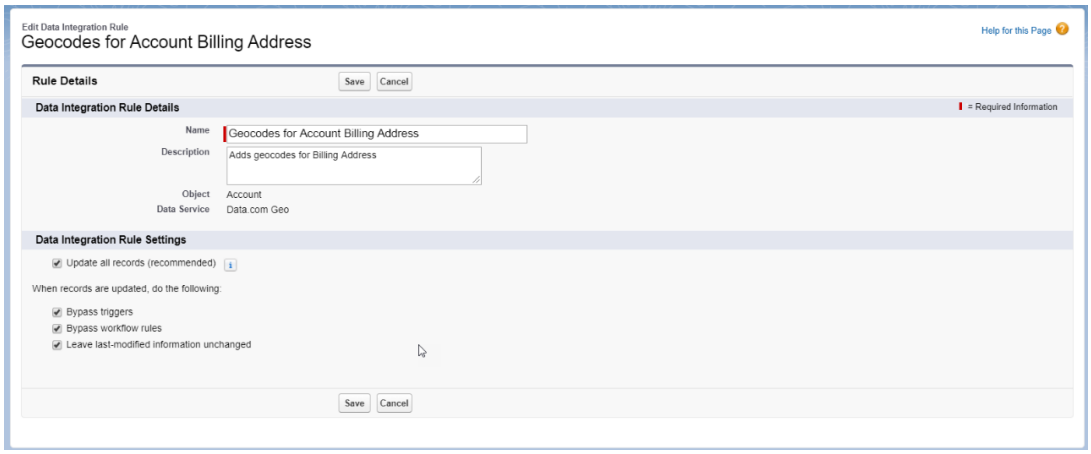
1.1.1 Set up Data.com Clean Rules

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.



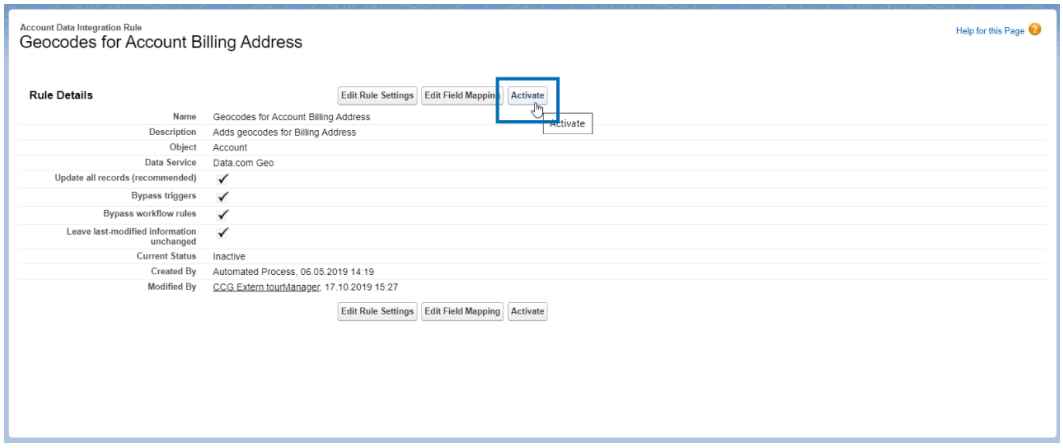
In the column Current Status, you can see which Data Integration Rule is active and which isn't.

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

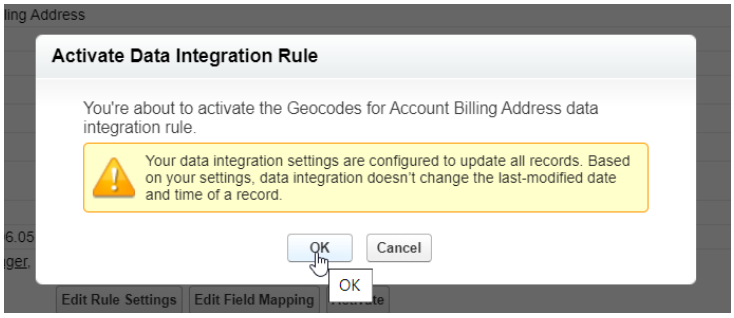


After adjusting the Rule Settings to your preferences, click Save.

In the next step you need to activate the Rule.

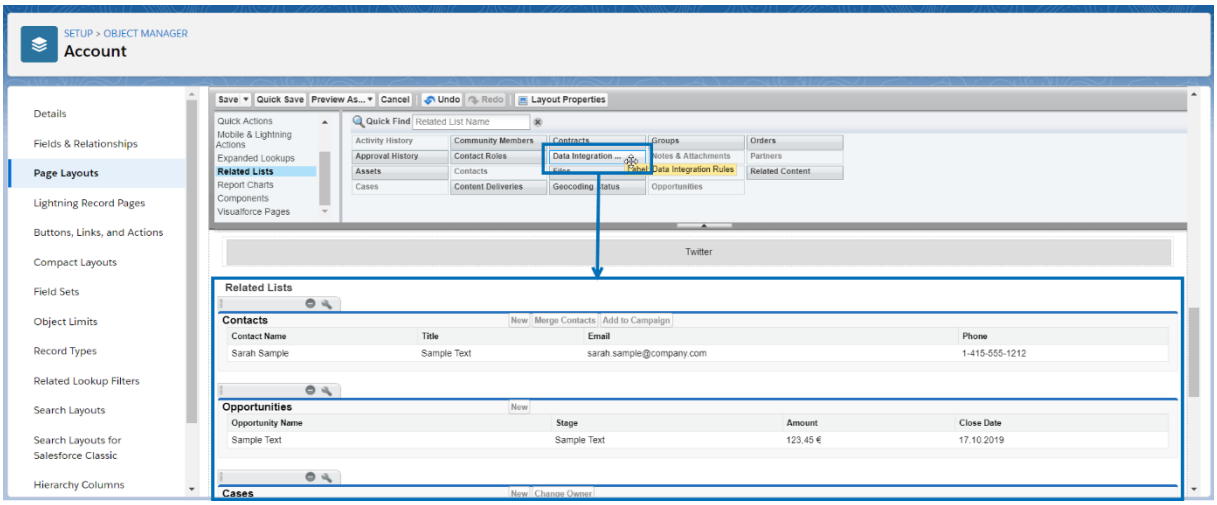


Finally, please confirm to enable the Rule.



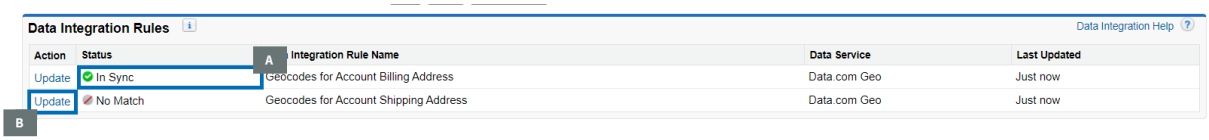
1.1.2 Monitor the Clean Status

You can monitor the Clean Status of your records by adding the “Clean This Record with Data.com” 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.

On the record page you can then see the Clean Status of your record.



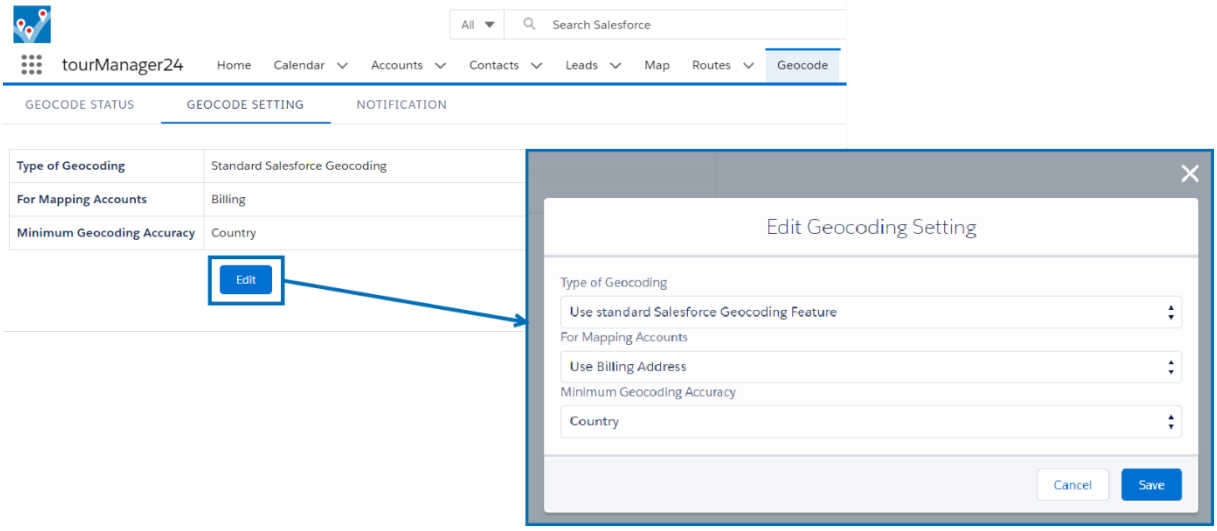
If the geocode rule’s Clean Status is set to In Sync, the record has up-to-date geocode information (A). If you see another status, you can manually clean the record by clicking Clean in the Action column (B).

More information on Geocode Clean 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)

1.1.3 Set up Salesforce Geocoding for tourManager24

To set up Salesforce Geocoding in tourManager24, go to the Geocode tab and click “Edit”. Then select *Use standard Salesforce Geocoding Feature*.

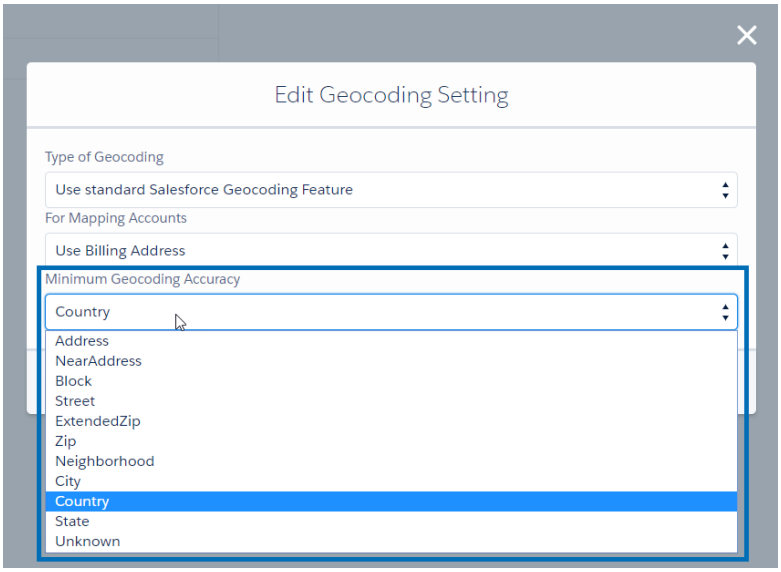


Below this option you can select whether to use the Shipping Address or Billing Address for showing your Accounts on map.

After you have set your preferences, click “Save”.

1.1.4 Defining minimum Geocode Accuracy for Search Results

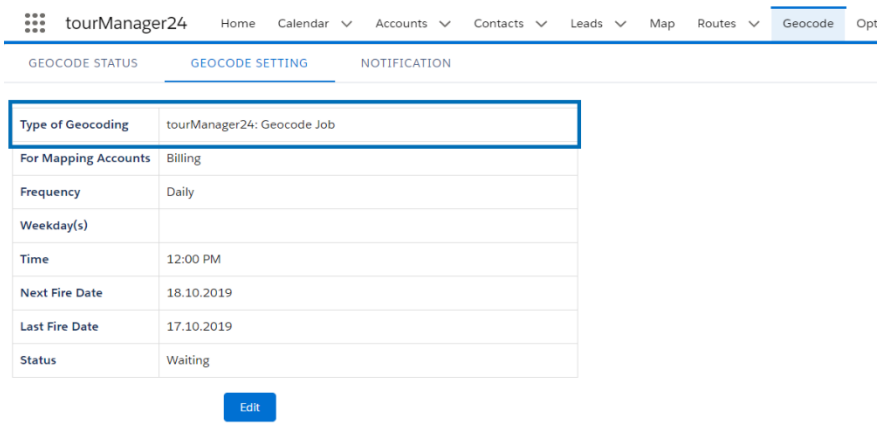
Another feature when selecting Salesforce geocoding is that you can set the minimum accuracy for items to be displayed as a search result.



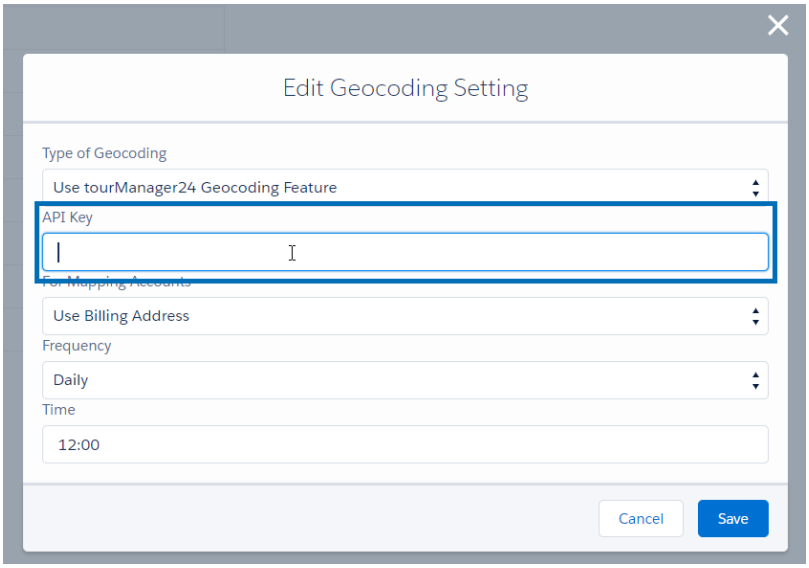
> When you click “Show on Map” on a record with an inaccurate geocoding it will be displayed regardless of what you have defined in the Minimum Geocode Accuracy setting.

1.2 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.

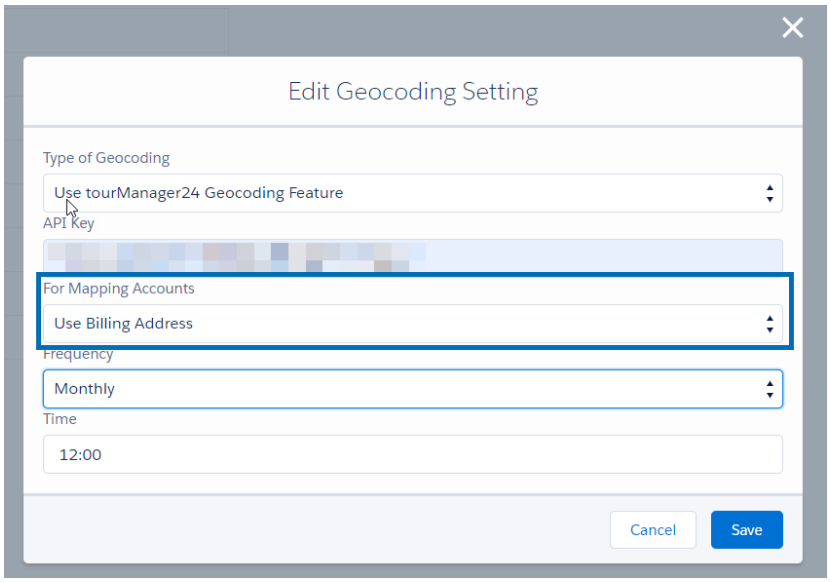


If you choose tourManager24 geocoding, you must enter your own API Key in an additional field.



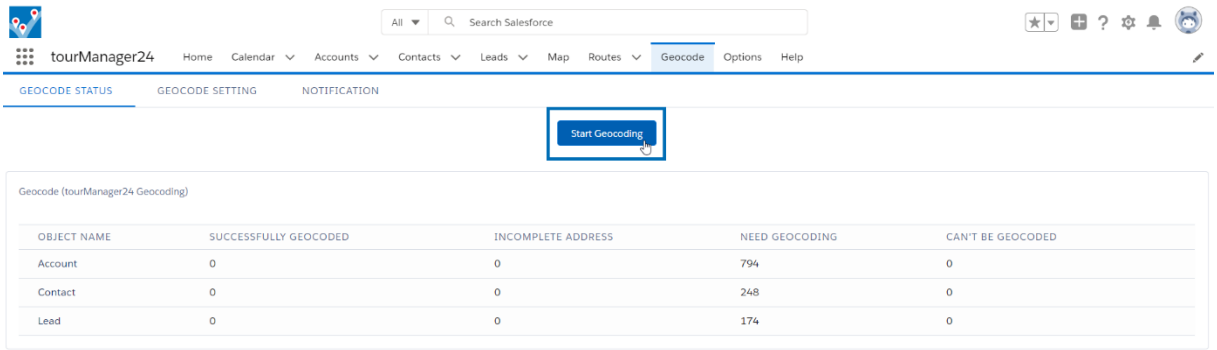
In the next chapter you'll read more about how to get an API Key.

Also, you've to choose whether to use Billing or Shipping Address in order to geocode your Accounts.



> 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.

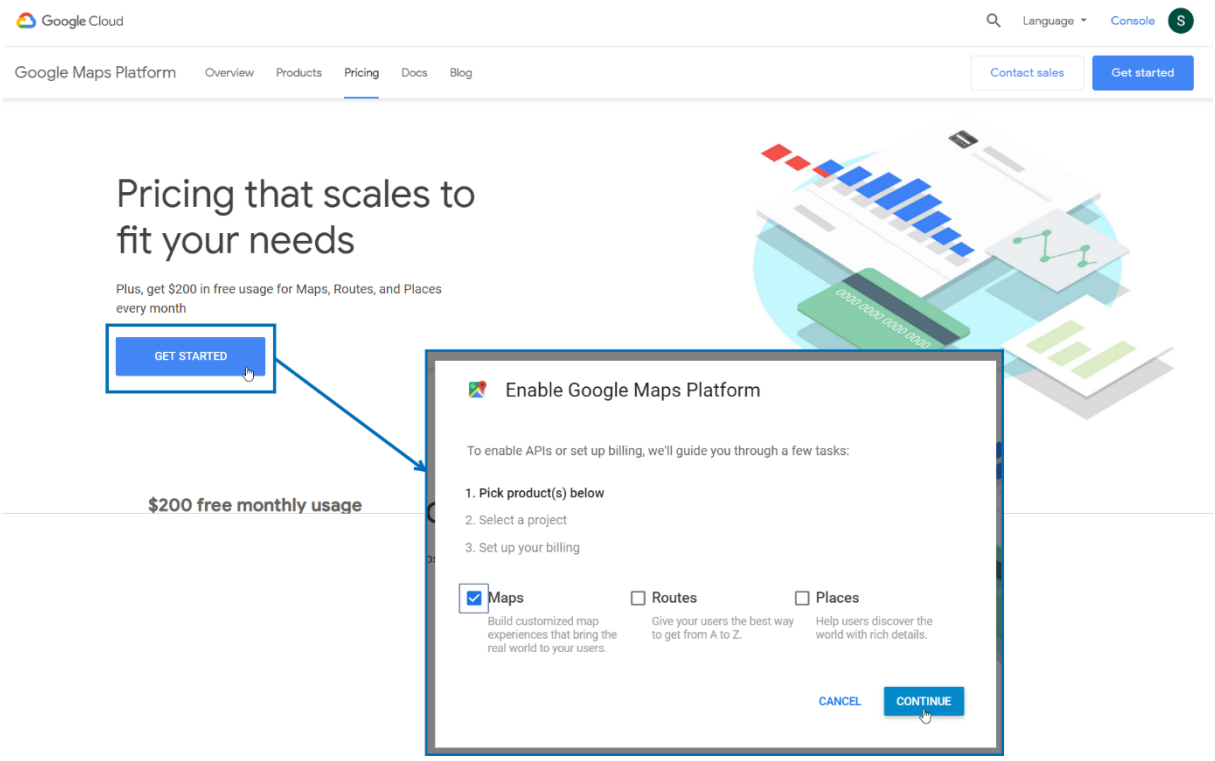


While the geocoding process is running the button will change its label to Geocoding in Progress. Leaving this tab while the geocoding process is running and even logging out of your org will not interrupt the process.

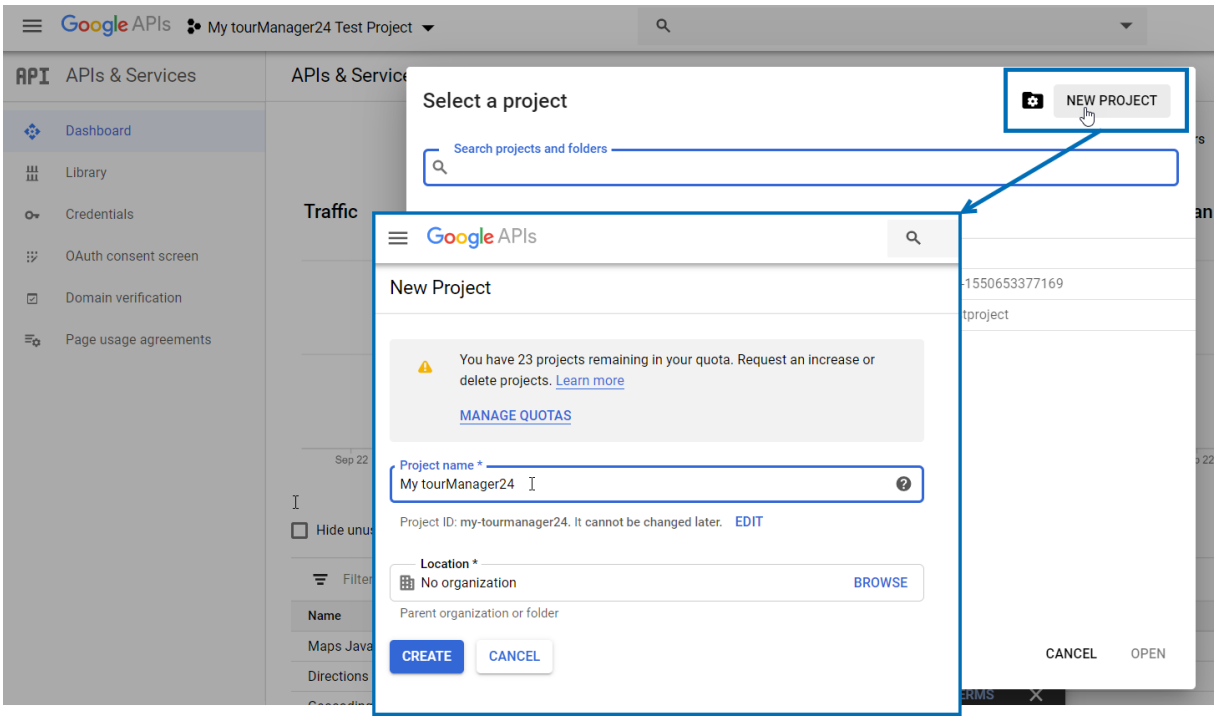
> This process might take several hours if you have a huge amount of data which needs to be geocoded.

1.2.1 How to get a Google Maps API Key

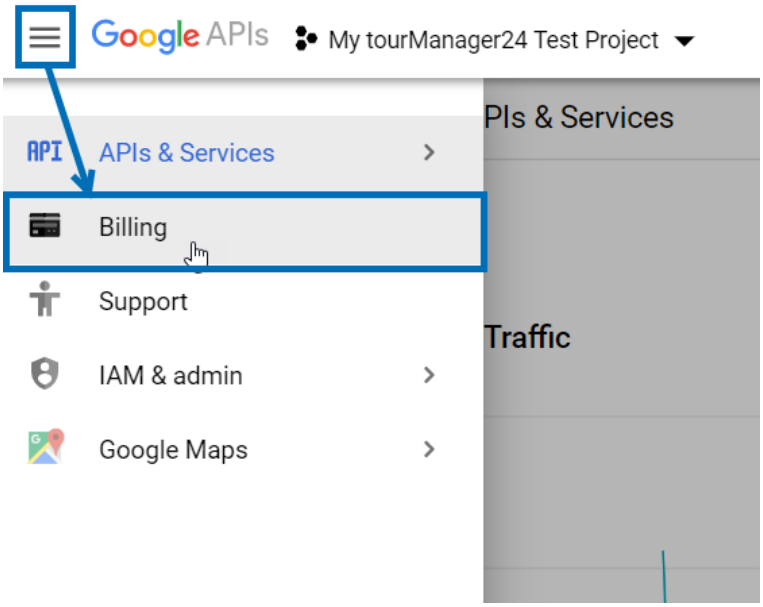
First, please follow this link to the official Google website. Afterwards click on “Get started”, choose “Maps” and click “Continue”.



You’ll be forwarded to the Google API Console. Here, create a new Project. After entering a name hit “Save”.

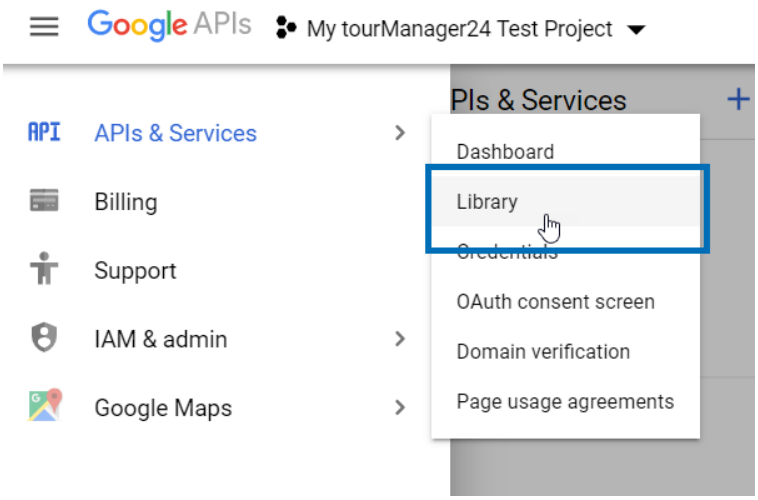


Before creating an API Key you have to enter some billing information. Therefore, open the navigation menu with the button in the upper left corner and click on “Billing”.

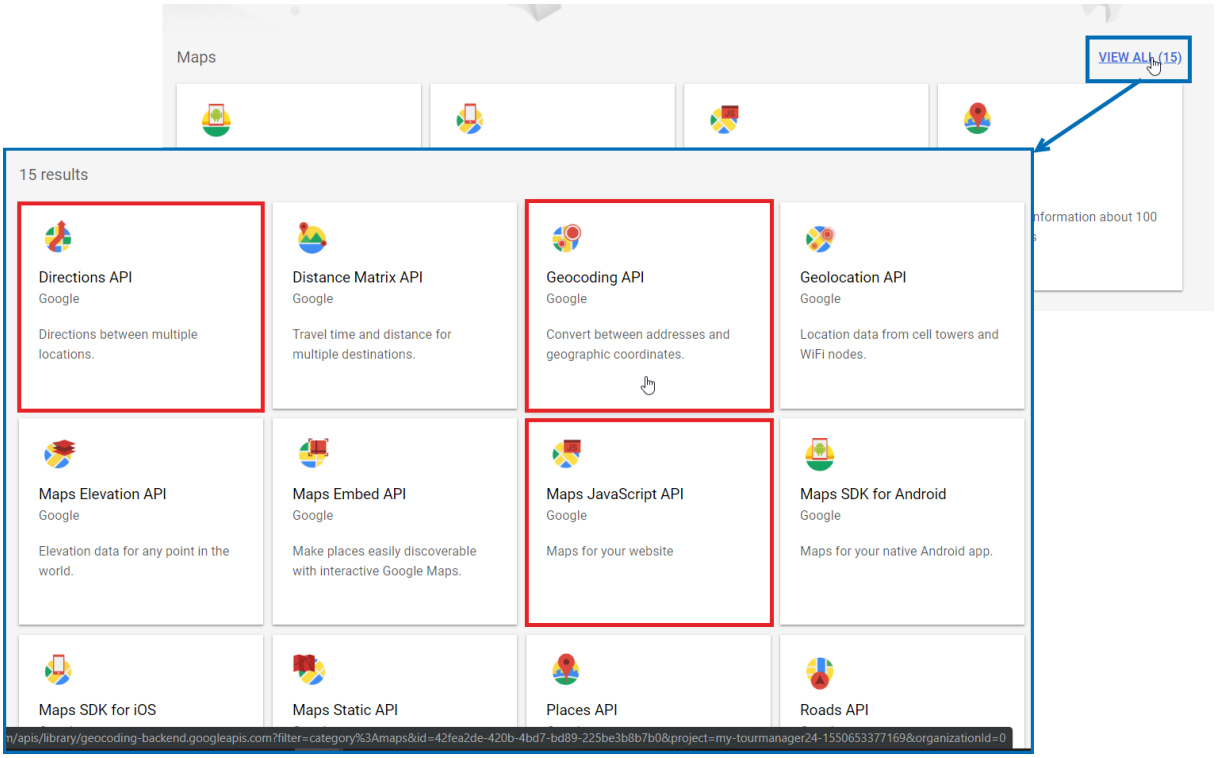


After creating the billing Account assign it to the new project, you’ve just created for your tourManager24 API Key.

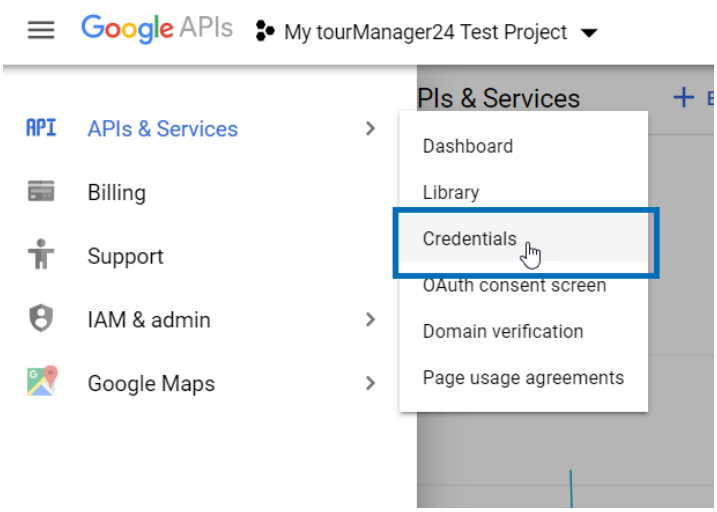
In the next step, you’ve to enable different Google APIs. Got to APIs & Services → Library.



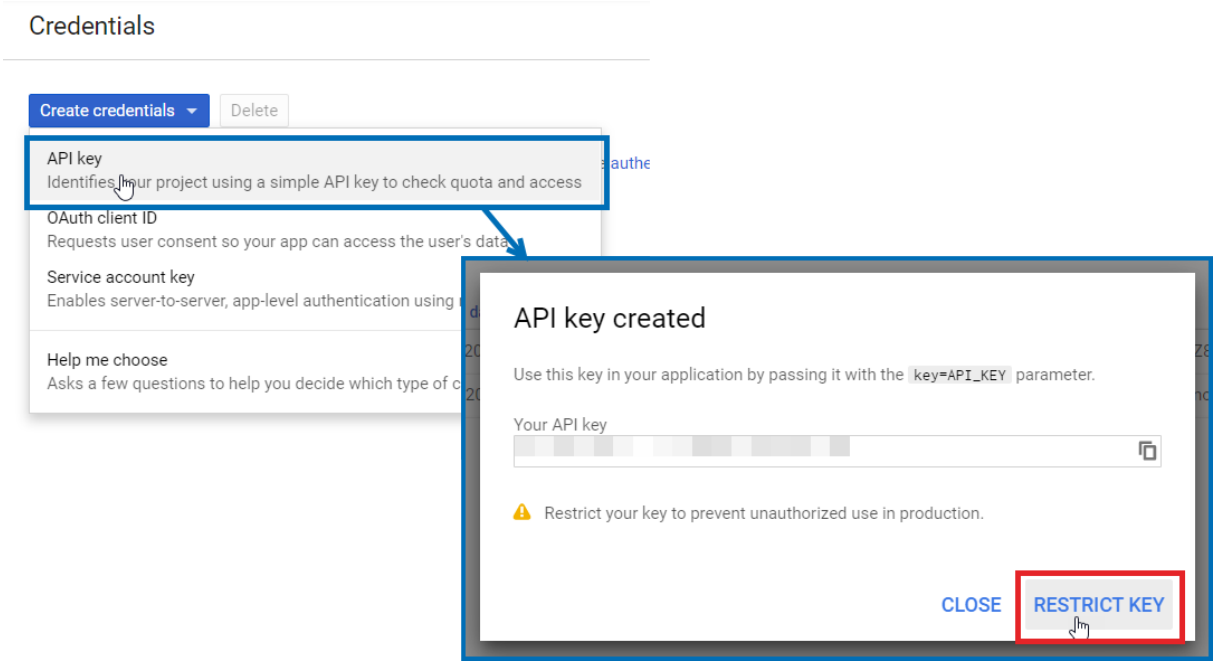
Choose “Geocoding API” and click “Enable”. Repeat this step also with: “Directions API” & “Maps JavaScript API”.



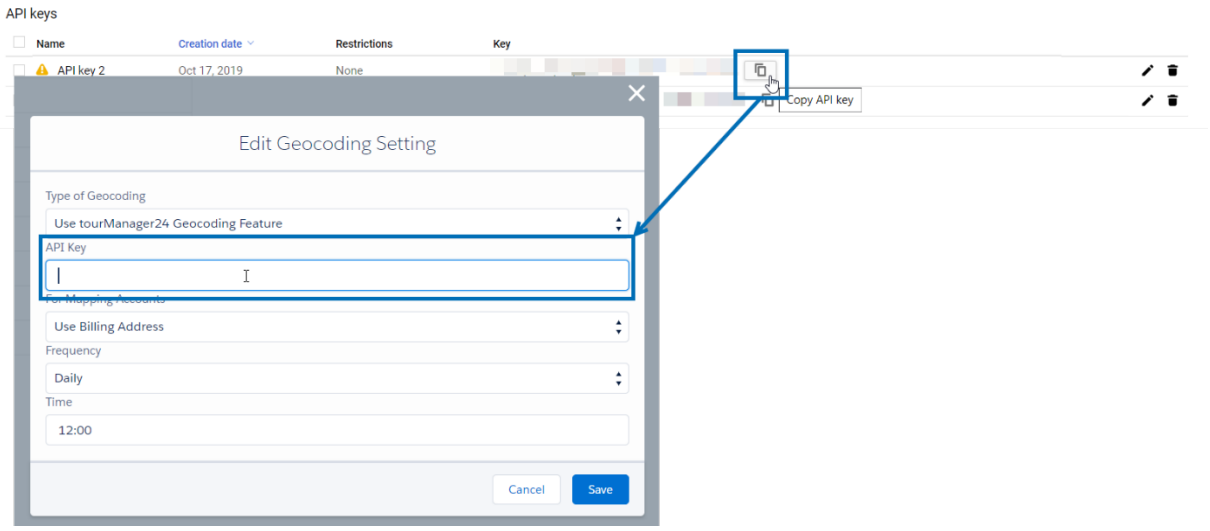
In a final step, you’ve to go to API & Services → Credentials.



Click create credentials and choose API Key. If needed you can restrict the API Key to only work with your Salesforce Org Domain.



Copy the API Key and paste it into the Geocoding Settings on the Geocoding Tab

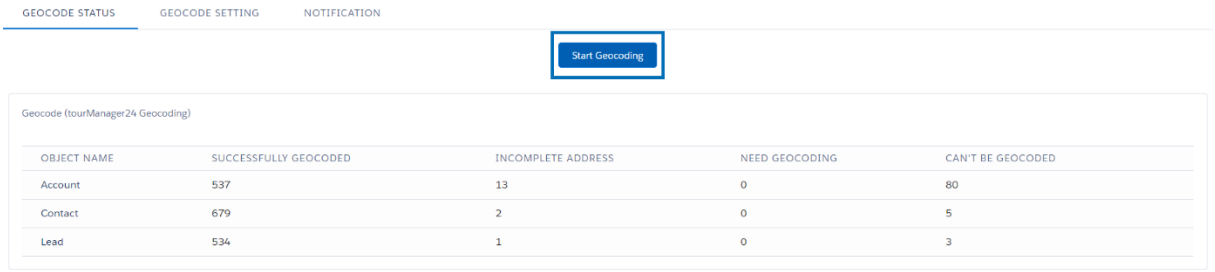


> Detailed information about the pricing model can be found here.

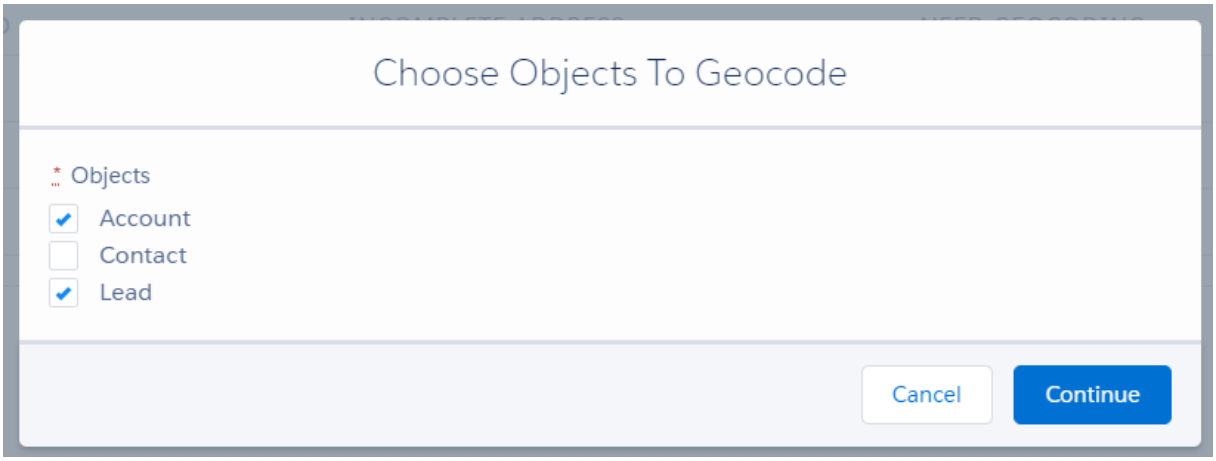
1.2.2 Start Geocoding manually

When you choose to geocode your data with the Google API, you've the chance to manually start the Geocoding Job. This is required when you choose this option for the first time.

After you set the Geocoding option to “Use tourManager24 Geocoding Feature” for the first time, you’re automatically forwarded to the Geocoding overview page. To start the Geocoding Job manually from here, just click the button “Start Geocoding”.



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.

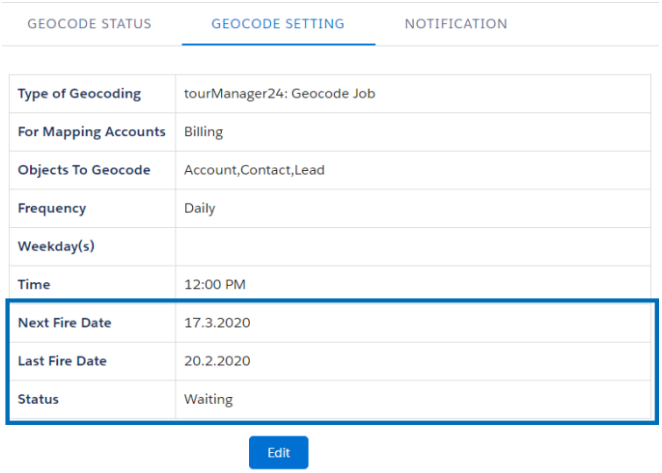


1.2.3 Schedule tourManager24 Geocoding

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.

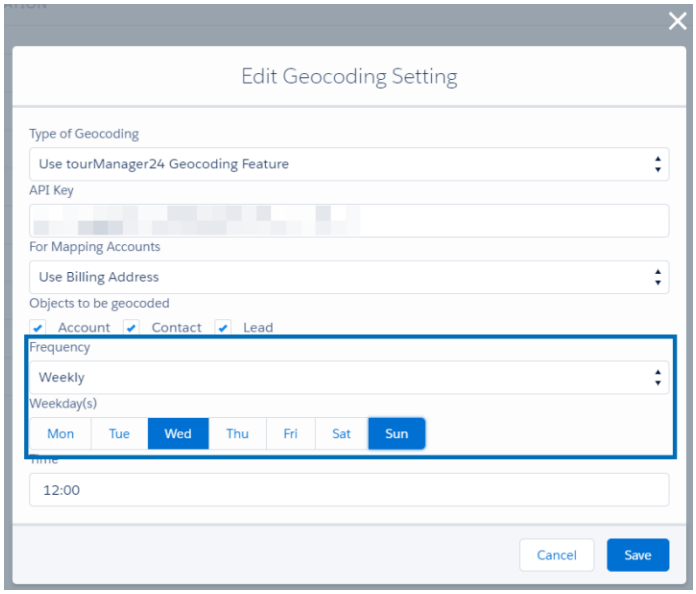
To schedule a tourManager24 geocoding job, open the **Geocode** tab within the tourManager24 app. In the subtab **Geocode Setting**, you will find the option *Use tourManager24 Geocoding Feature*. This section also contains information when the geocoding process was performed, when it will be performed next and whether it is in progress or waiting for the next time to run.



Schedule tourManager24 Geocoding job on a frequent basis

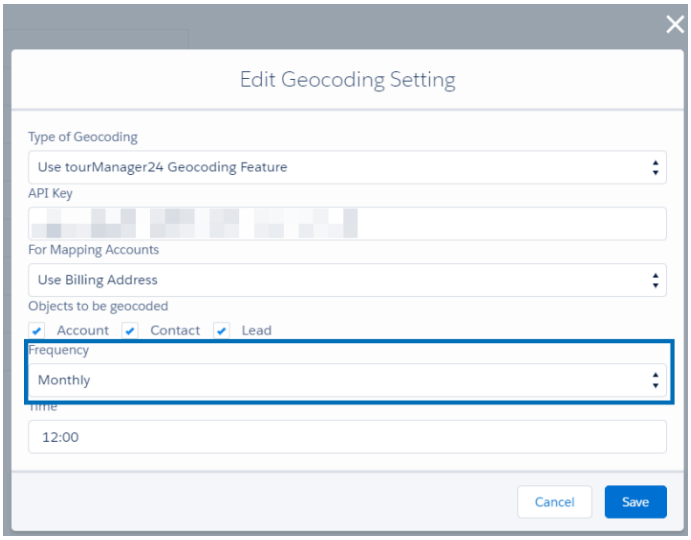
> This is only available when using tourManager24 Geocoding not when using Standard Salesforce Geocoding.

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



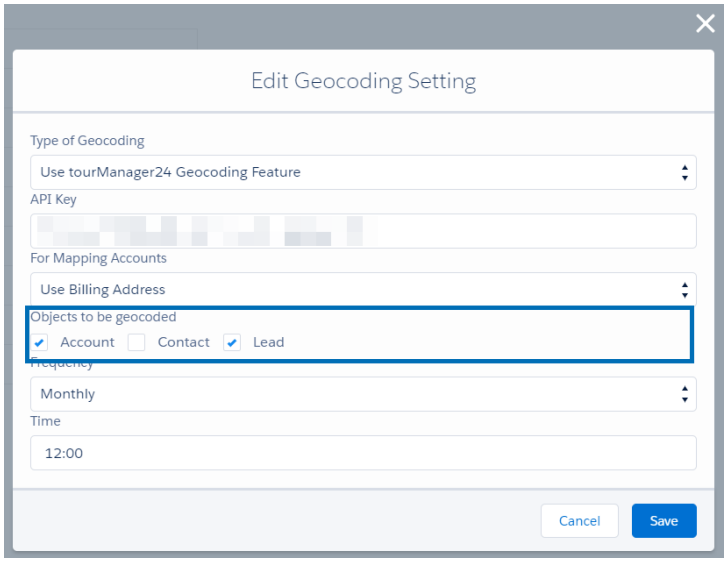
Then click on the day(s) in the week you want the geocoding process to be run. Afterwards set your Preferred Start Time. You can enter the time via manual input or click on the suggested time.

Then click “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.

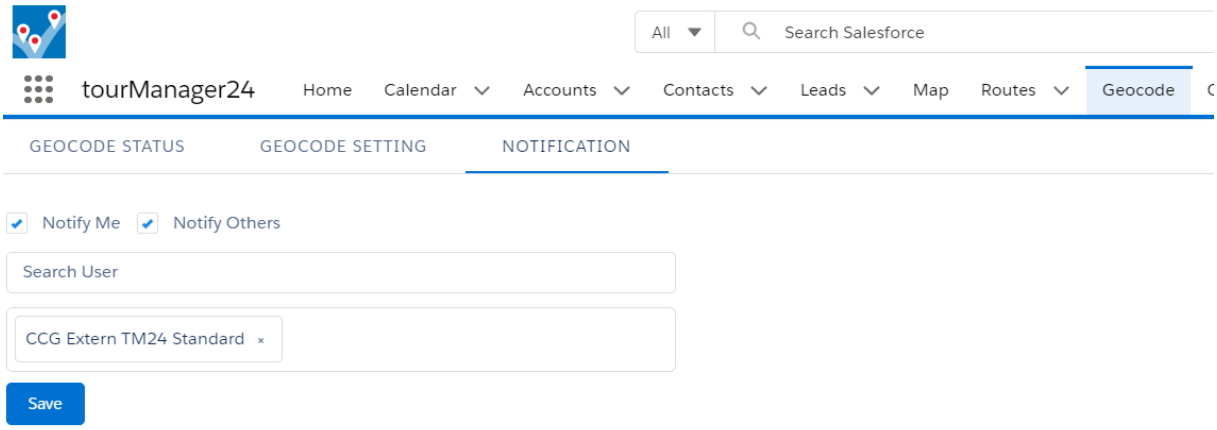


1.2.3 Monitor your Geocoding result

Email

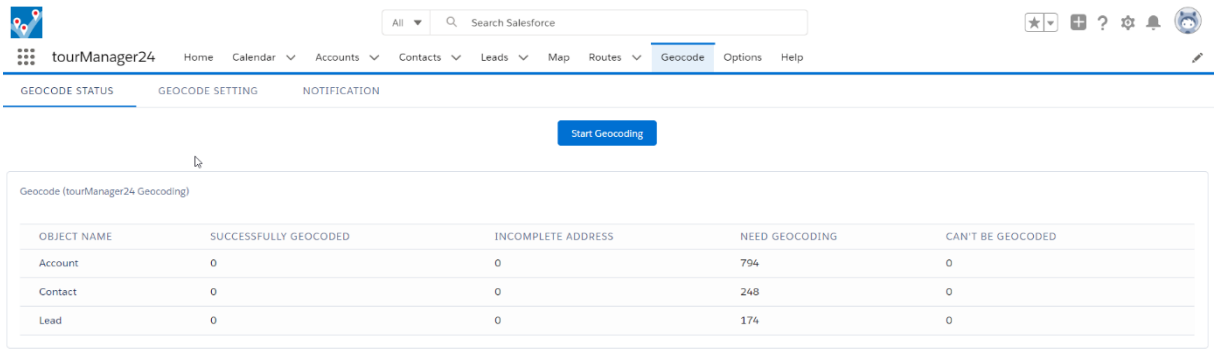
> When your records are geocoded, you will receive an email that the process has been completed. This email also contains a link to your Salesforce geocode page. You can decide who should be notified.

You can either choose Notify Me (default) or add additional Salesforce Users by clicking Notify Others and then choose users who should receive an email when geocoding is completed.



Geocode Status

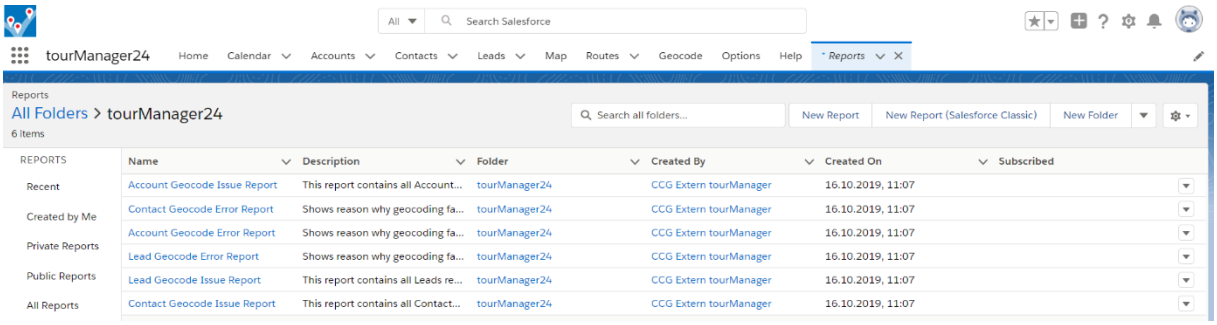
On the Geocode tab you can always see an overview of the geocoding status of your Accounts, Contacts and Leads. This status is automatically updated if new records are created in your org.



> 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.

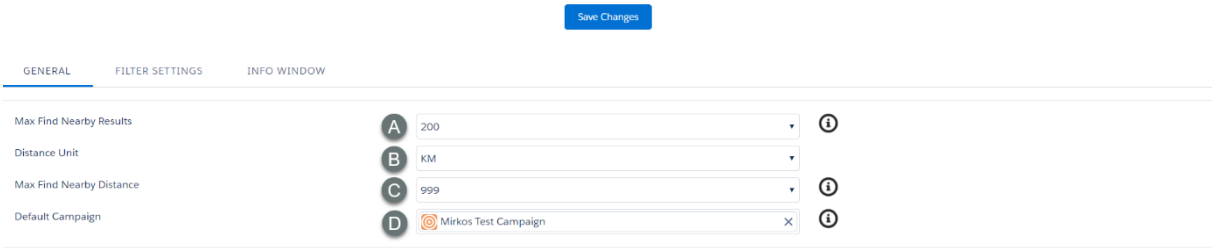
The “Account Geocode Error Report” provides details on geocoding issues of accounts if a validation rule or a required field was the reason of the failure, the “Contact Geocode Error Report” provides details on geocoding issues of contacts if a validation rule or a required field was the reason of the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

2 OPTIONS

Within the tourManager24 app you will find the Options-tab in the navigation bar. This is where you define default values and the display of details for locations and filter search.

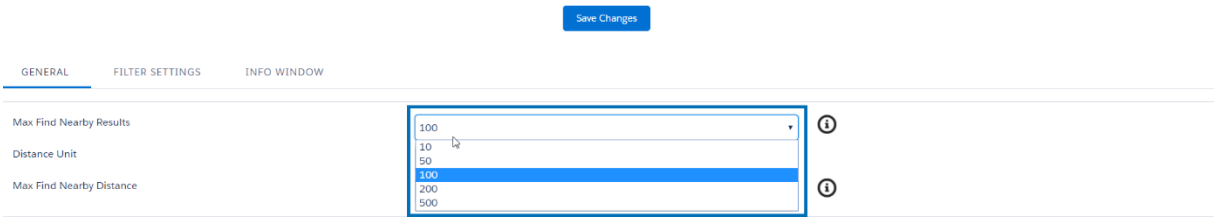
2.1 General

Here you can define the maximum number of Find Nearby Results (A), the default Distance Unit (B), the Maximum Find Nearby Distance (C) and the option to choose a default campaign (D).



2.1.1 Maximum Find Nearby Results

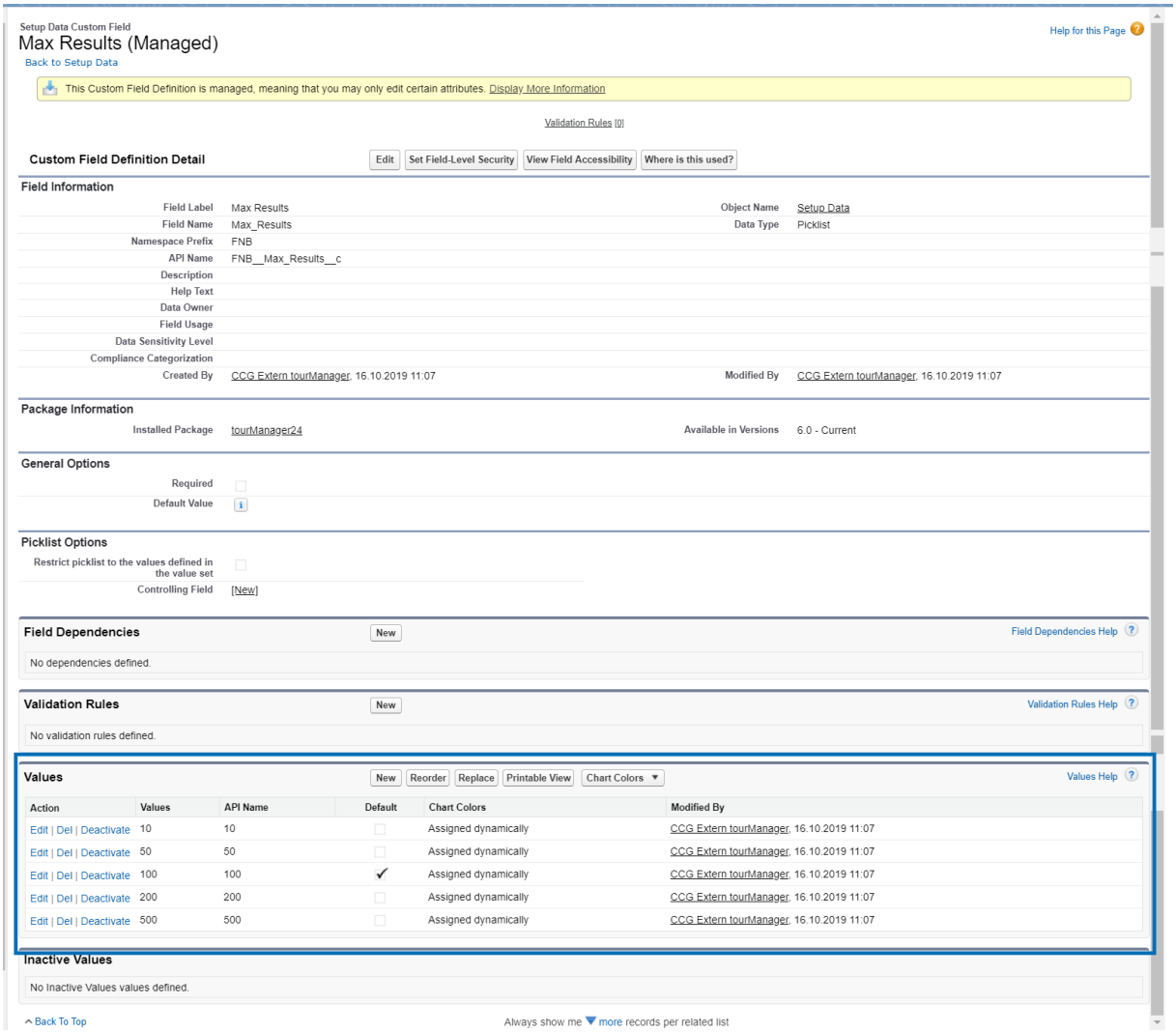
The field Max Find Nearby Results defines the maximum number of records for each object (Accounts, Contacts, Leads) which will be displayed in the search results.



In case you have used tourManager24 versions older than v.3.21 you might not receive all picklist values by default. If so, you can add them manually using the Salesforce Setup.

Go to: Setup → Create → Objects → Setup Data (API Name: FNB__setupData__c) → Max Results

Here, you can add the values needed.

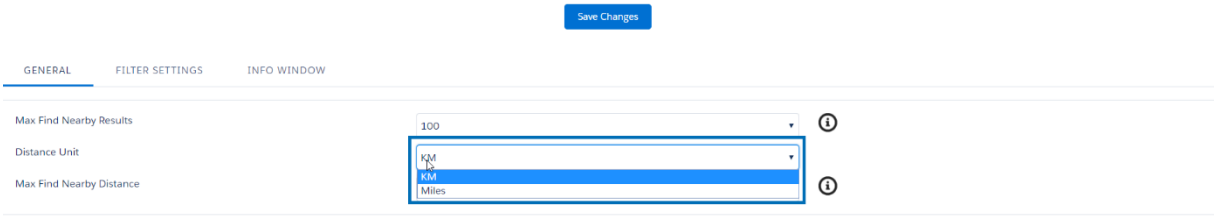


We highly recommend, NOT to enter values for the maximum number of search results higher than 500, as this might result in problems regarding maximum page size.

The speed of the “Find Nearby” Function might decrease the more search results you allow.

2.1.2 Distance Unit

In the field Distance Unit you can define the default unit for the proximity search. You can choose between KM and Miles.

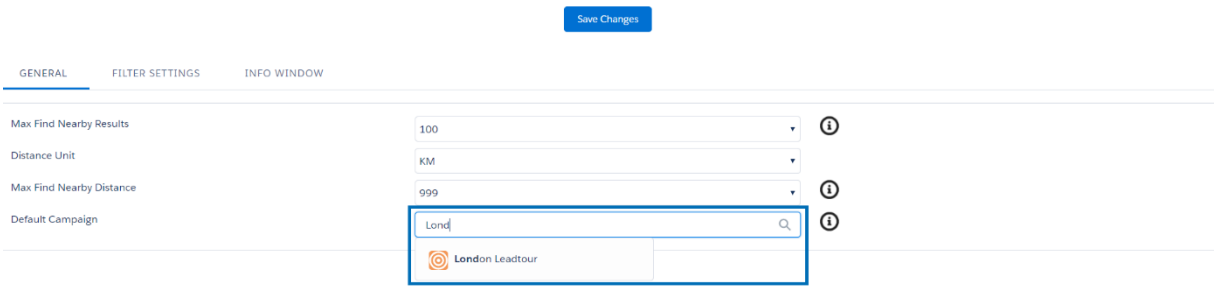


2.1.3 Maximum Find Nearby Distance

In the field Max Find Nearby Distance you can set the maximum radius for the nearby search. You can choose between 99 KM/Miles and 999 KM/Miles.

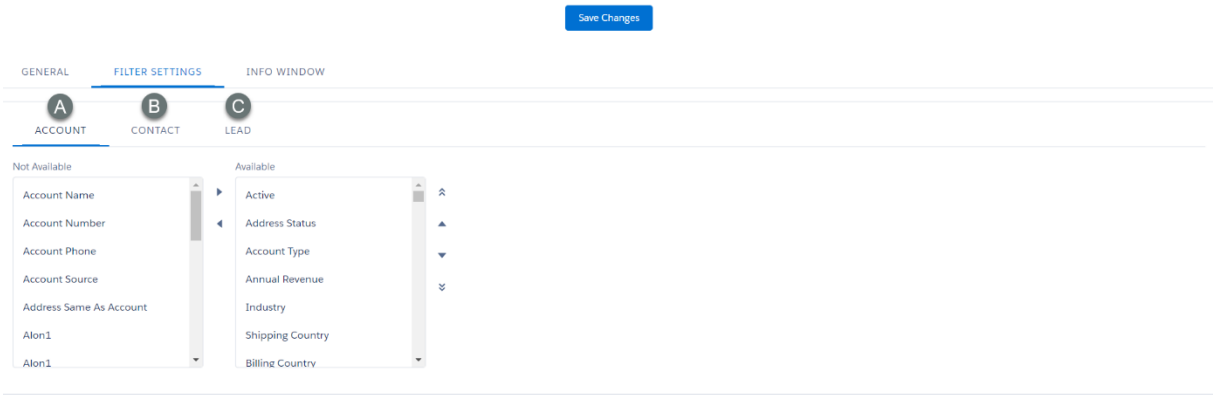
2.1.4 Default Campaign

After mapping Leads or Contacts on the map your users have the chance to add different records to a campaign as members. If there exists a major campaign where all Contacts and Leads have to be part of at least once in their lifetime you can choose this campaign as default campaign here. This will help your users to save clicks.

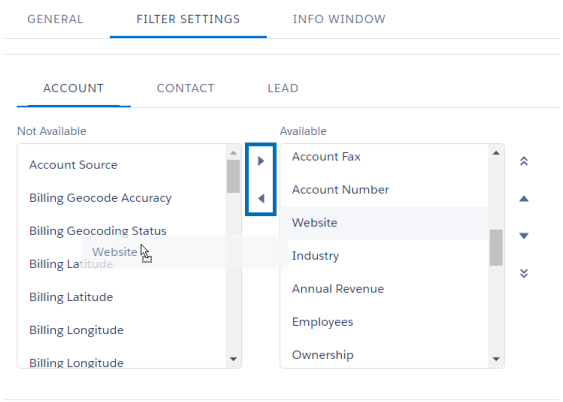


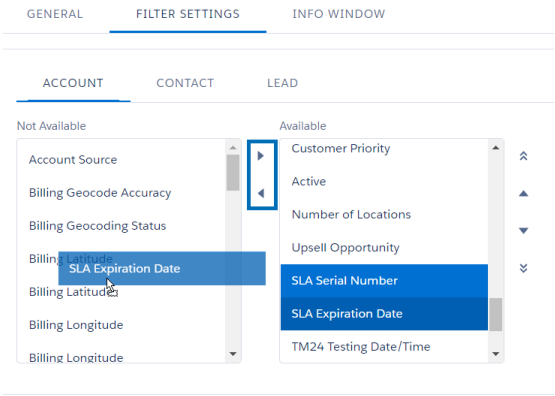
2.2 Filter Settings

In the subtab FILTER SETTINGS of the Options page you can define the fields that are available when you add a filter to the search. You can save different values for your ACCOUNT (A), CONTACT (B) and LEAD (C) by clicking on each of the subtabs.

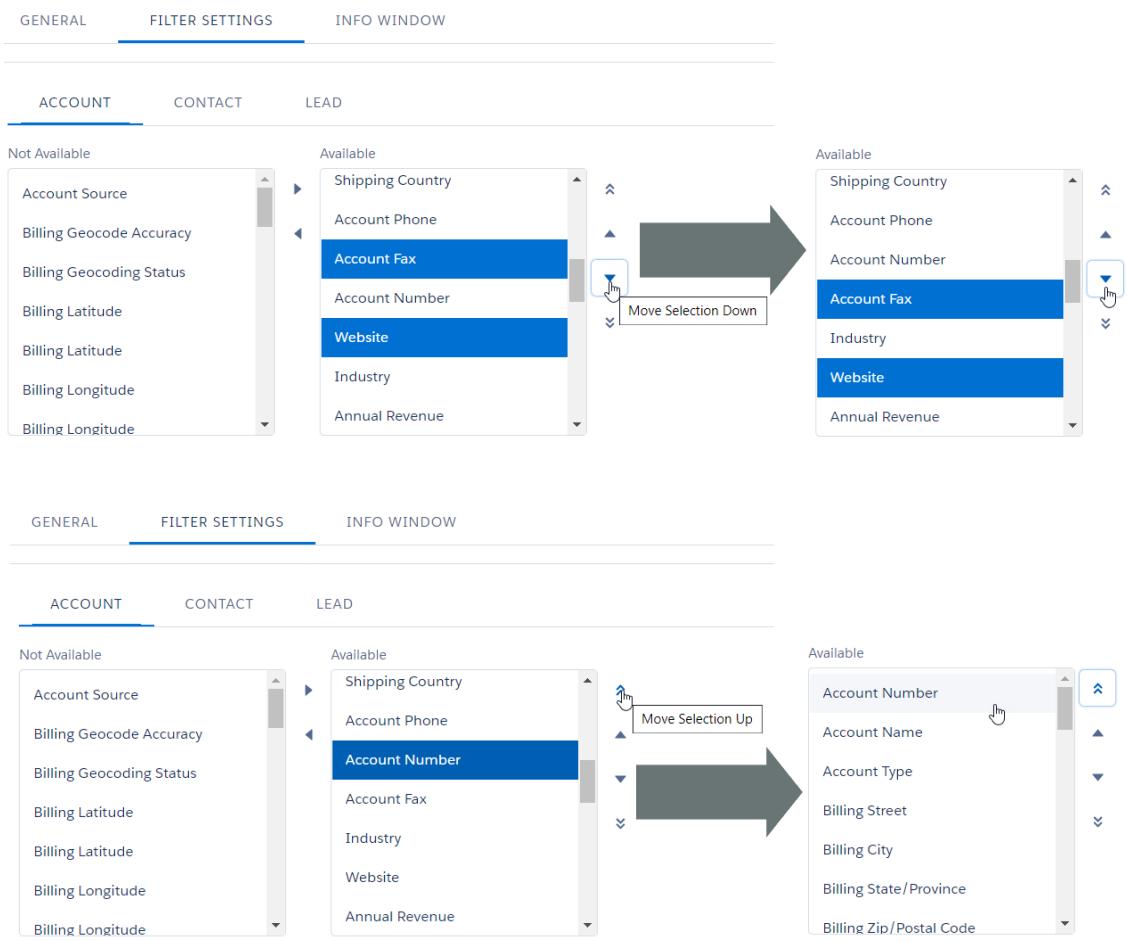


You can ad and remove either one single field via drag-and-drop or using the left and right arrows or multiple fields by selecting the fields (“Ctrl” + mouse click on Windows and “Command” + mouse click on iOS) between the columns.



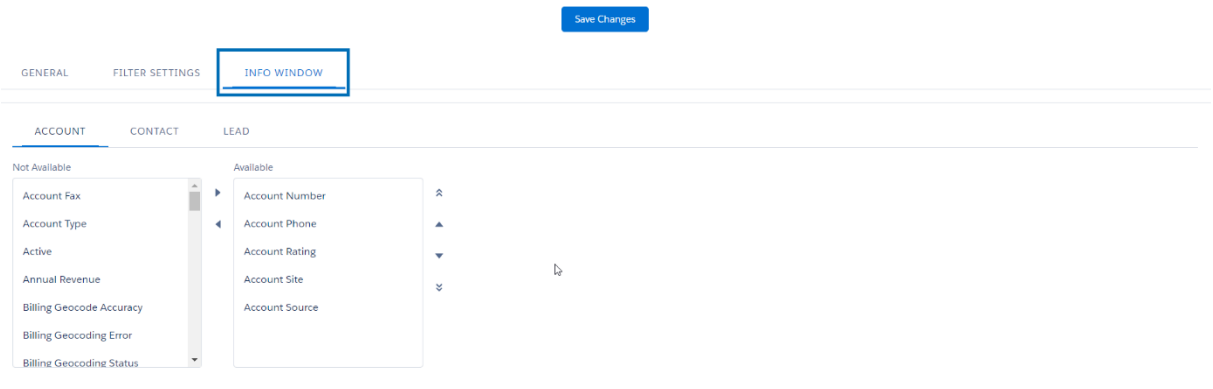


Also, you can move one field or multiple fields either right to the top or bottom via using the outer arrows on the right of the column “Available” or only one position up or down with the inner arrows.

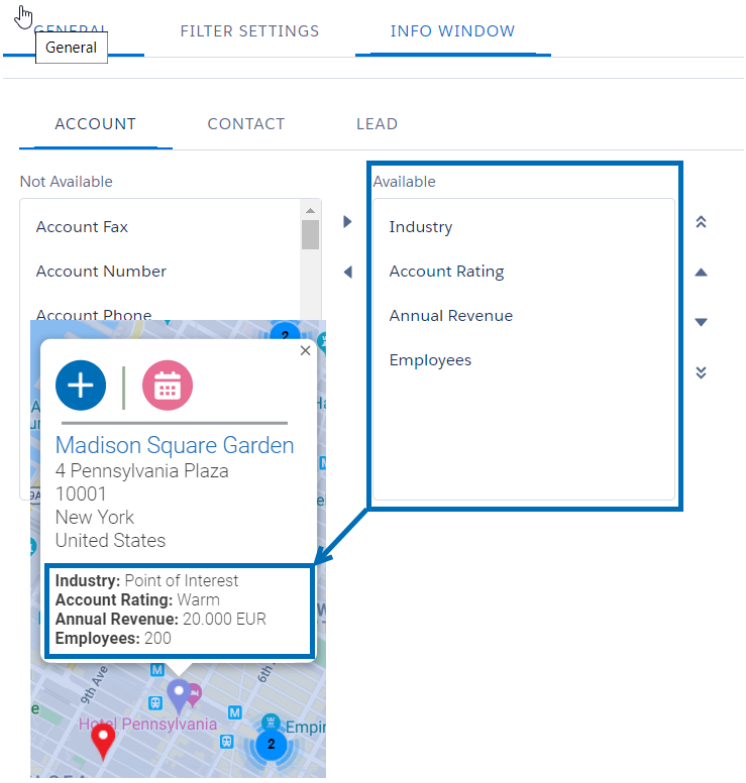


2.3 Info Window Settings

In the subtab INFO WINDOW SETTINGS of the Options tab you decide which fields should be displayed in the info window for each object.



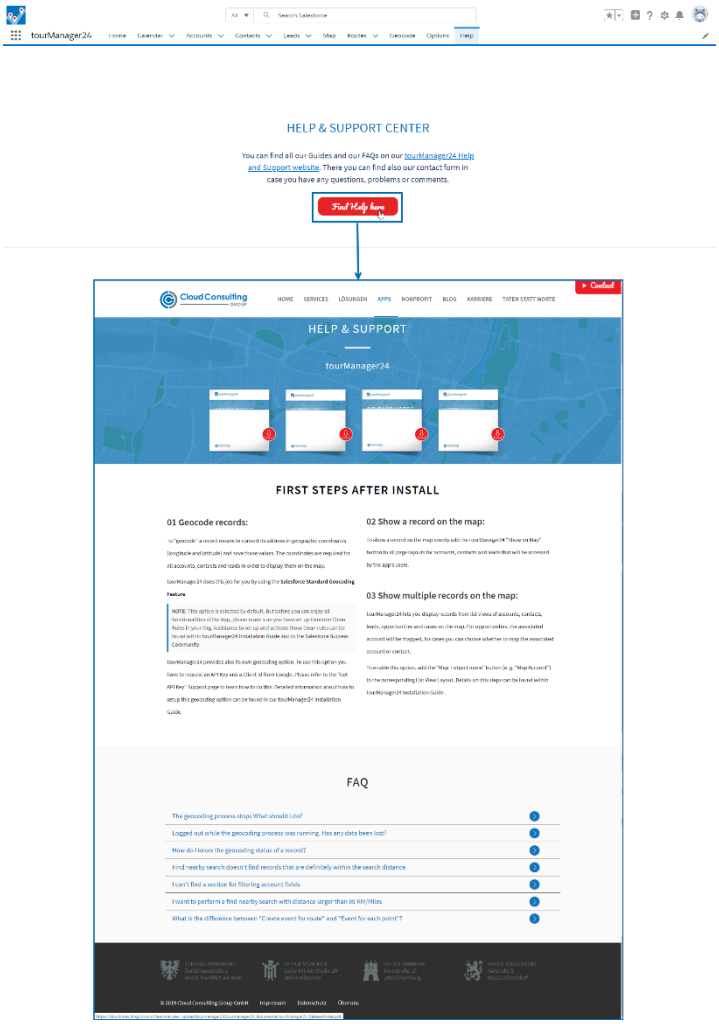
Fields which you make available show up below the address of the record mapped.



Like in the tab “Filter Settings”, you can change the order, remove or add fields by using the arrows next to the columns or drag-and-drop.

3 HELP TAB

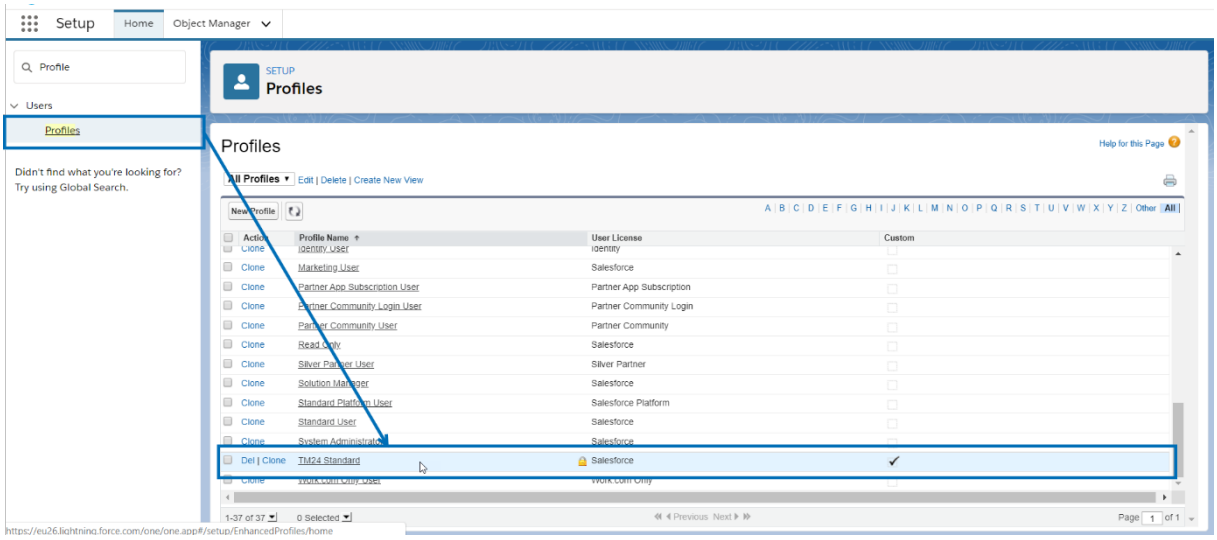
Under this tab, you can find a link which directly forwards you to our tourManager24 Help & Support Center. Here, you can find all our documentation for Admins and Users and the most current FAQs. Additionally, you can contact us via our contact form.



4 PERMISSIONS

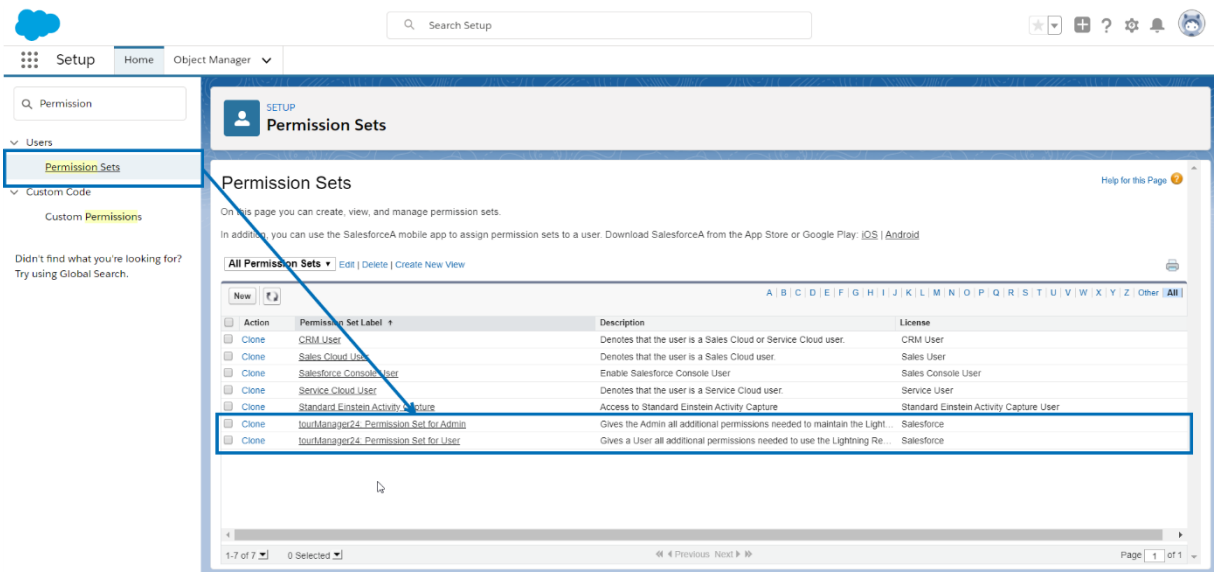
This section gives an overview on which tabs, objects, Visualforce pages, Apex Classes and Triggers must be enabled for administrators and user profiles to make tourManager24 available.

To edit the settings, go to: Setup → Manage Users → Profiles and select the relevant profile. Keep in mind, that you can only edit custom profiles.



4.1 Permission Sets

It has never been easier to setup the tourManager24 app. With Release 5.0 and later ones the torManager24 comes with permission sets. When the installation is complete you will find two permission sets:



1. Permission Set for Admin

If you have a standard Salesforce System Administrator this is not needed. You will need to assign this permission set only if there are Admins with a custom System Administrator profile who are responsible for maintaining the tourManager24 app.

2. Permission Set for User

Assign this permission set to every tourManager24 user.

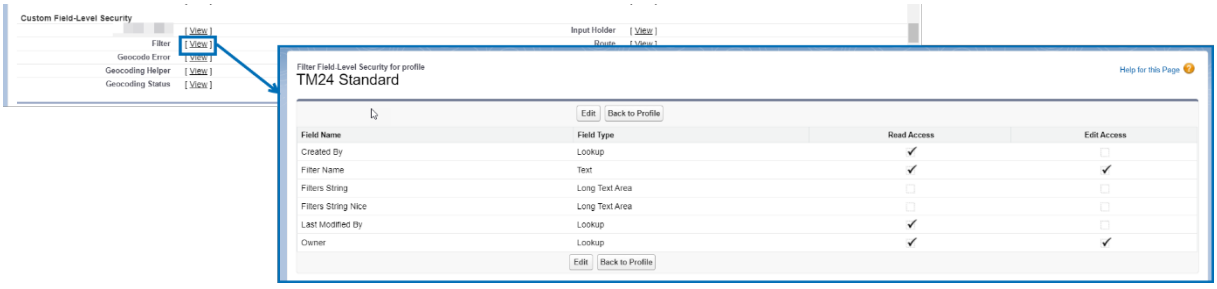
> The Permission Sets provided only grant access to fields needed for tourManager24. Additionally, you might have to grant permission for org specific custom fields.

4.2 Field Level Security

> If you are using the provided Permission Sets explained in the last chapter consider this as info only. You can skip chapter 4 from here and find out how to Manage Licences instead. Come back later if you need more information about permissions for tourManager24.

Go to Custom Field-Level Security settings. Here, you can find the objects being part of the tourManager24 package.

For each of the objects (Filter, Geocoding Error, Geocoding Status, Geocoding Helper, Input Holder, Route, searchCriteria, Setup Data) click on [View] to edit the Field-Level Security settings.



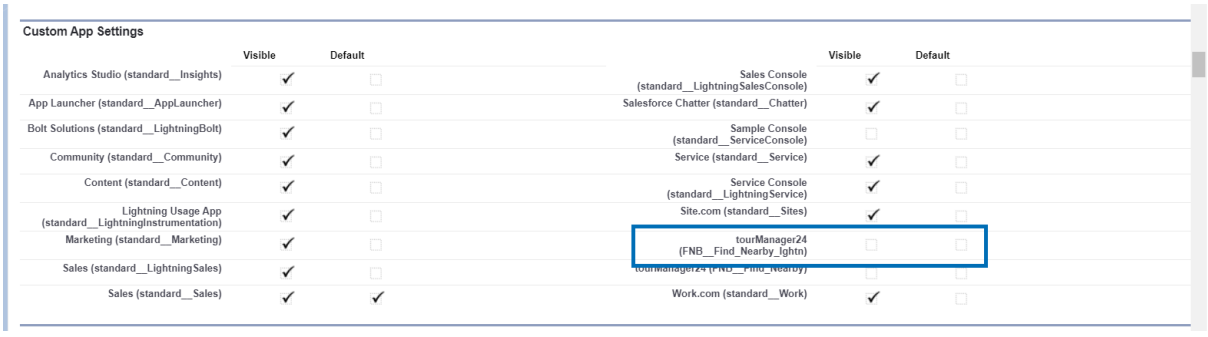
Please make sure to set all fields for all profiles to Visible/Read Access.

It is also necessary to set all fields for some of the objects to Edit Access. Please see details about this in the table below:

Object	Read Access	Edit Access
Filter	x	x
Geocoding Error	x	
Geocoding Status	x	
Geocoding Helper	x	
Input Holder	x	x
Route	x	x
searchCriteria	x	x
Setup Data	x	

4.3 Custom App Settings

In the Custom App Settings section, make sure that the tourManager24 App with the abbreviation “lghtn” at the end is marked Visible.



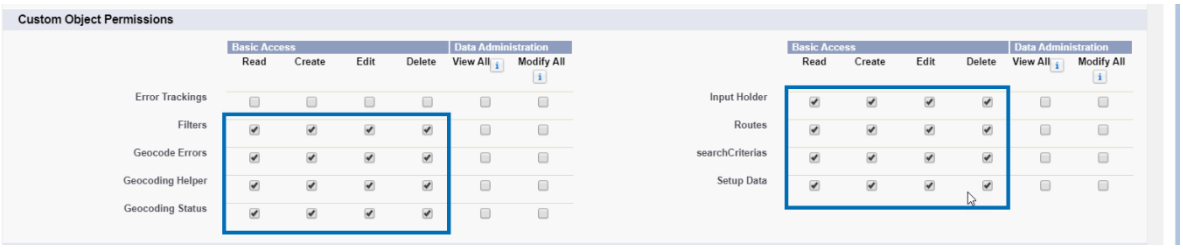
4.4 Tab Settings

Neither admins nor users will require all tabs to be visible. Please find our recommendations for tab visibility settings in the table below:

Tab	Admin	User
Map	Default On	Default On
Route	Default On	Default On
Geocode	Default On	Default Off
Options	Default On	Default Off
Help	Default On	Default Off

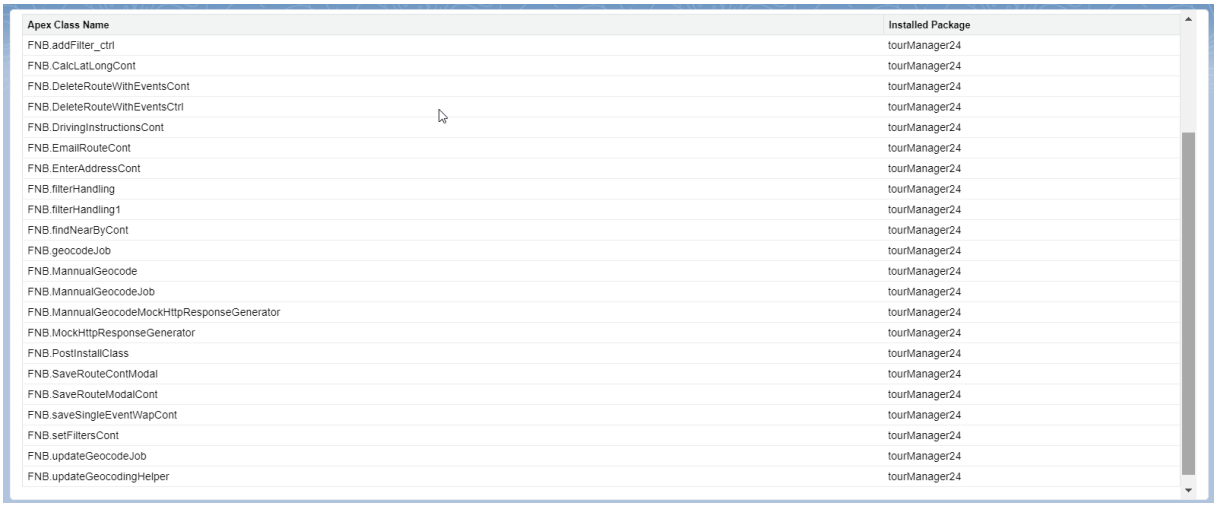
4.5 Custom Object Permissions

Check all boxes for Basic Access in the Custom Object Permissions section for the objects Filters, Geocoding Error, Geocoding Status, Geocoding Helper, Input Holder, Routes, searchCriteria and Setup Data.



4.6 Enabled Apex Class Access

To use all features of tourManager24 enable access to all Apex Classes starting with “FNB”.



4.7 Enabled Visualforce Page Access

To use all features of tourManager24 enable access to all Visualforce pages starting with “FNB”.

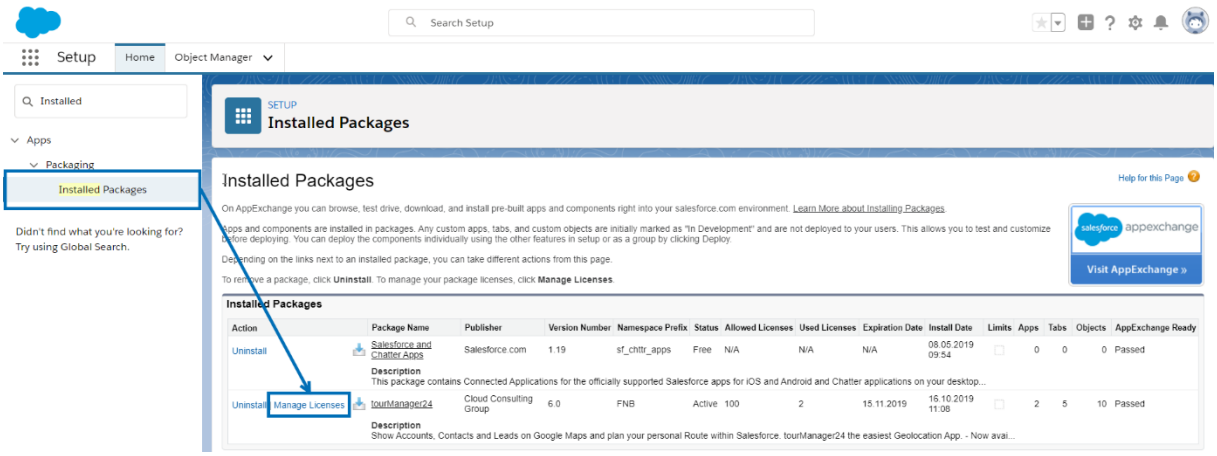
Visualforce Page Access

Visualforce Page Name	Installed Package
FNB.CalcLatLong	tourManager24
FNB.CalcLatLong1	tourManager24
FNB.DeleteRouteWithEvents	tourManager24
FNB.drivingInstructions	tourManager24
FNB.DrivingInstructionsPdf	tourManager24
FNB.drivingInstructionsWap	tourManager24
FNB.emailRoute	tourManager24
FNB.emailRouteWap	tourManager24
FNB.enterAddress	tourManager24
FNB.findNearBy	tourManager24
FNB.findNearByResults	tourManager24
FNB.FindNearbyWap	tourManager24
FNB.GoToRouteDetail	tourManager24
FNB.goToTrackingToolAccount	tourManager24
FNB.goToTrackingToolAccounts	tourManager24
FNB.goToTrackingToolContact	tourManager24
FNB.goToTrackingToolContacts	tourManager24
FNB.goToTrackingToolLead	tourManager24
FNB.goToTrackingToolLeads	tourManager24
FNB.helpPage	tourManager24
FNB.mapCases	tourManager24
FNB.mapContactsOfCases	tourManager24
FNB.mapOpps	tourManager24
FNB.picklist	tourManager24
FNB.pickListValues	tourManager24
FNB.SaveRoute	tourManager24
FNB.SaveRouteWap	tourManager24
FNB.saveSingleEvent	tourManager24
FNB.saveSingleEventWap	tourManager24
FNB.setFilters	tourManager24
FNB.setupPage	tourManager24
FNB.showRouteOnMap	tourManager24

5 MANAGE LICENSES

The last step is to allocate the available tourManager24 licenses to all users who should have access to the app. Go to: Setup → Apps → Installed Packages.

On the “Installed Packages” page click on “Manage Licenses” in the action column of tourManager24.



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 tourManager24 Installation 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. 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.

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