



# 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.

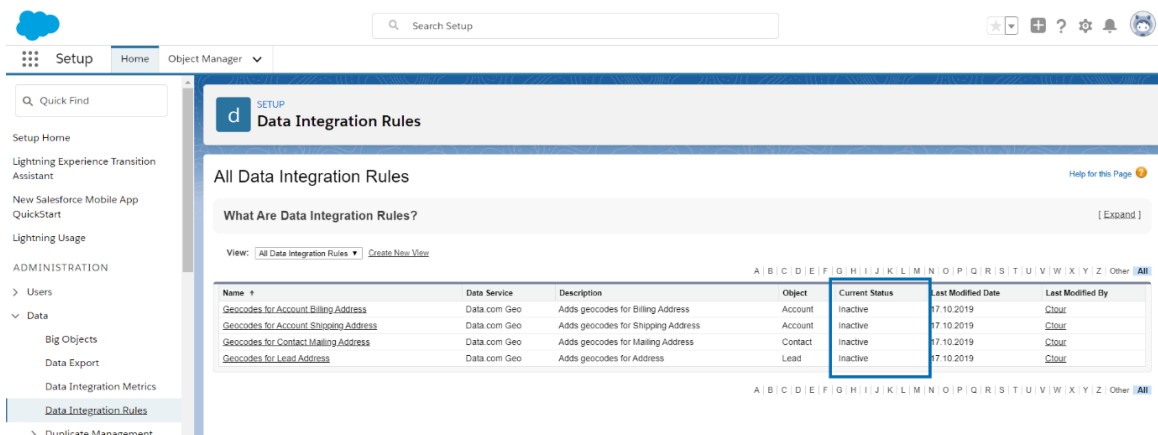
Our internal tests have shown some inaccuracies of the Standard Salesforce Geocoding feature resulting in several addresses which did not get proper geocodes.

## 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.



Name	Data Service	Description	Object	Current Status	Last Modified Date	Last Modified By
<a href="#">Geocodes for Account Billing Address</a>	Data.com Geo	Adds geocodes for Billing Address	Account	Inactive	17.10.2019	<a href="#">Clear</a>
<a href="#">Geocodes for Account Shipping Address</a>	Data.com Geo	Adds geocodes for Shipping Address	Account	Inactive	17.10.2019	<a href="#">Clear</a>
<a href="#">Geocodes for Contact Mailing Address</a>	Data.com Geo	Adds geocodes for Mailing Address	Contact	Inactive	17.10.2019	<a href="#">Clear</a>
<a href="#">Geocodes for Lead Address</a>	Data.com Geo	Adds geocodes for Address	Lead	Inactive	17.10.2019	<a href="#">Clear</a>

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.

Account Data Integration Rule  
Geocodes for Account Billing Address

Help for this Page

**Rule Details** Save Cancel

**Data Integration Rule Details** Required Information

Name: Geocodes for Account Billing Address  
Description: Adds geocodes for Billing Address  
Object: Account  
Data Service: Data.com Geo

**Data Integration Rule Settings**

Update all records (recommended)

When records are updated, do the following:

Bypass triggers  
 Bypass workflow rules  
 Leave last-modified information unchanged

Save Cancel

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

In the next step you need to activate the Rule.

Account Data Integration Rule  
Geocodes for Account Billing Address

Help for this Page

**Rule Details** Edit Rule Settings Edit Field Mapping Activate

Name	Geocodes for Account Billing Address
Description	Adds geocodes for Billing Address
Object	Account
Data Service	Data.com Geo
Update all records (recommended)	<input checked="" type="checkbox"/>
Bypass triggers	<input checked="" type="checkbox"/>
Bypass workflow rules	<input checked="" type="checkbox"/>
Leave last-modified information unchanged	<input checked="" type="checkbox"/>
Current Status	Inactive
Created By	Automated Process: 06.05.2019 14:19
Modified By	CCG_ExtremTourManager: 17.10.2019 15:27

Edit Rule Settings Edit Field Mapping Activate

Finally, please confirm to enable the Rule.

ing Address

**Activate Data Integration Rule**

You're about to activate the Geocodes for Account Billing Address data integration rule.

**Warning** Your data integration settings are configured to update all records. Based on your settings, data integration doesn't change the last-modified date and time of a record.

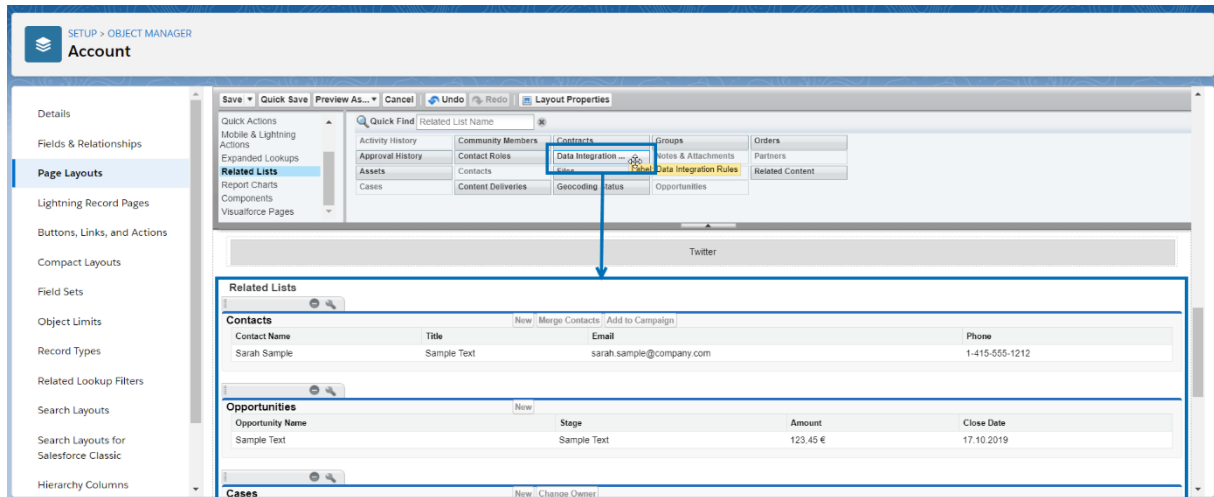
6.05  
9.01

OK Cancel

Edit Rule Settings Edit Field Mapping Activate

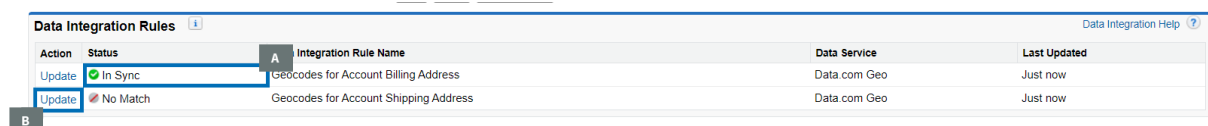
## 1.1.2 Monitor the Clean Status

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.



Action	Status	Integration Rule Name	Data Service	Last Updated
Update	In Sync	Geocodes for Account Billing Address	Data.com Geo	Just now
Update	No Match	Geocodes for Account Shipping Address	Data.com Geo	Just now

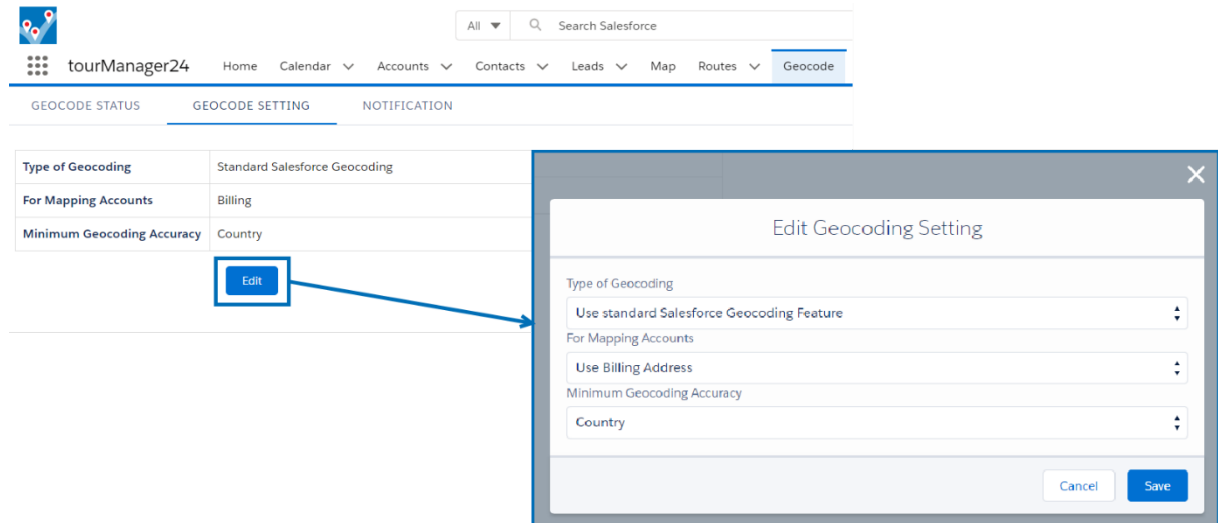
If the geocode rule’s Clean Status is set to In Sync, the record has up-to-date geocode information (A). If you see another status, you can manually clean the record by clicking Clean in the Action column (B).

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*.

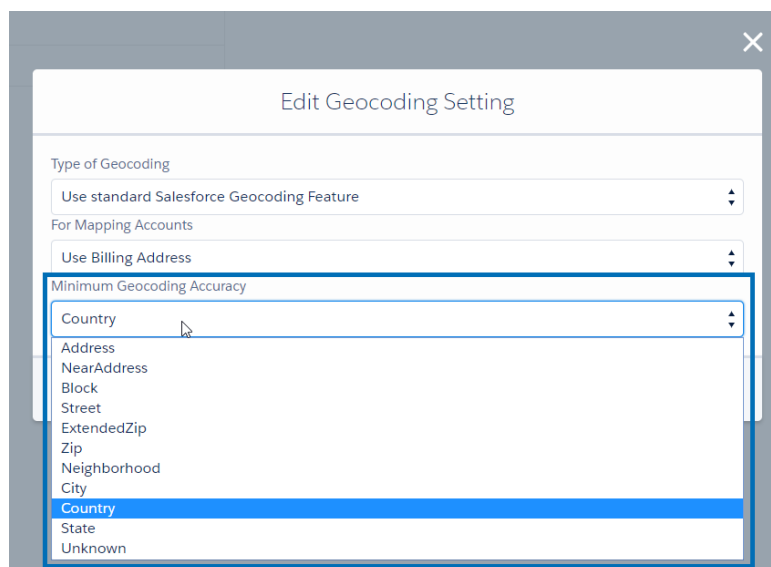


Below this option you can select whether to use the Shipping Address or Billing Address for showing your Accounts on map.

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.



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

Dialog box titled "Edit Geocoding Setting" with the following fields:

- Type of Geocoding: Use tourManager24 Geocoding Feature
- API Key: [Blurred]
- For Mapping Accounts: Use Billing Address (highlighted)
- Frequency: Monthly
- Time: 12:00
- Buttons: Cancel, Save

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.

Geocode (tourManager24 Geocoding)

OBJECT NAME	SUCCESSFULLY GEOCODED	INCOMPLETE ADDRESS	NEED GEOCODING	CAN'T BE GEOCODED
Account	0	0	794	0
Contact	0	0	248	0
Lead	0	0	174	0

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”.

Google Cloud

Google Maps Platform Overview Products Pricing Docs Blog

Language Console

Contact sales Get started

### Pricing that scales to fit your needs

Plus, get \$200 in free usage for Maps, Routes, and Places every month

**GET STARTED**

#### Enable Google Maps Platform

To enable APIs or set up billing, we'll guide you through a few tasks:

- Pick product(s) below
- Select a project
- Set up your billing

**Maps**  
Build customized map experiences that bring the real world to your users.

**Routes**  
Give your users the best way to get from A to Z.

**Places**  
Help users discover the world with rich details.

CANCEL CONTINUE

**\$200 free monthly usage**

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

Google APIs My tourManager24 Test Project

APIs & Services

Dashboard Library Credentials OAuth consent screen Domain verification Page usage agreements

Traffic

Select a project

NEW PROJECT

Search projects and folders

### New Project

You have 23 projects remaining in your quota. Request an increase or delete projects. [Learn more](#)

[MANAGE QUOTAS](#)

Project name \* My tourManager24

Project ID: my-tourmanager24. It cannot be changed later. [EDIT](#)

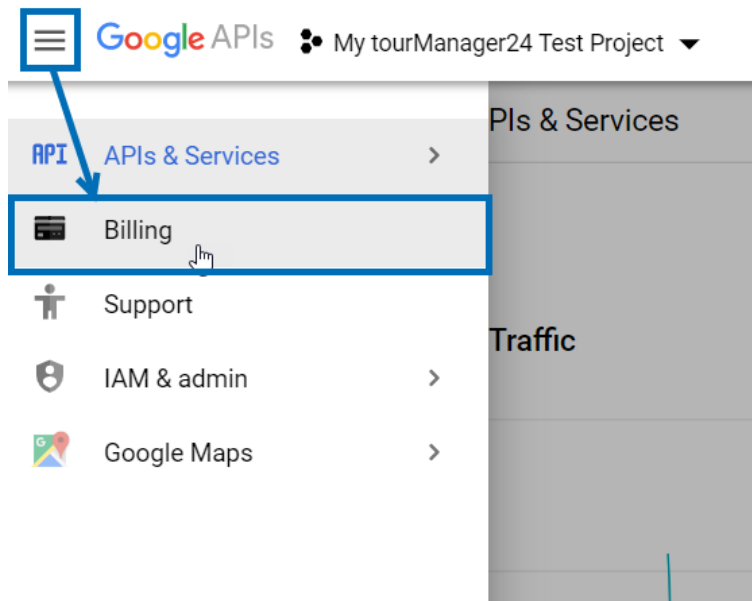
Location \* No organization [BROWSE](#)

Parent organization or folder

CREATE CANCEL

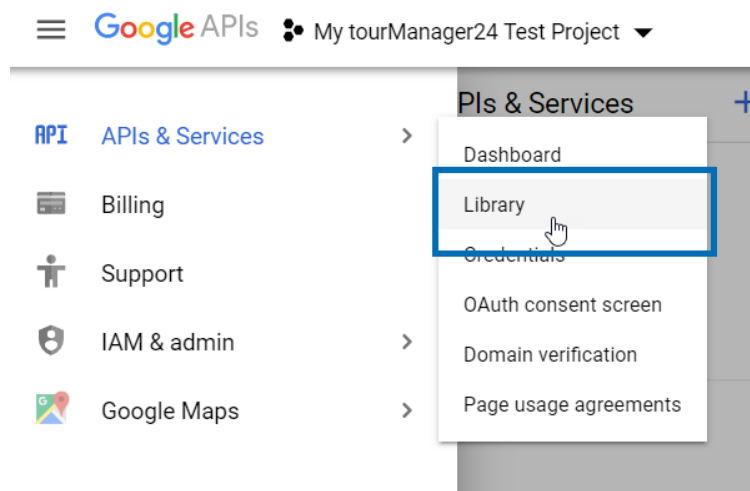
CANCEL OPEN

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”.

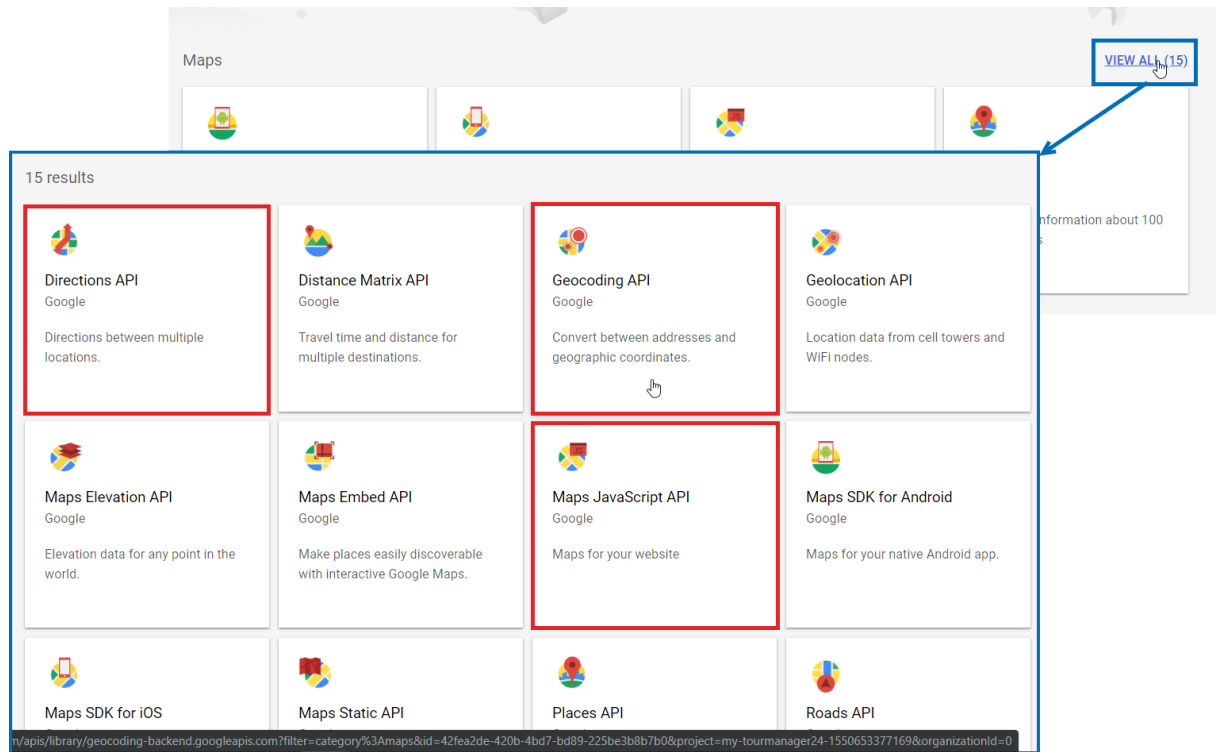


After creating the billing Account assign it to the new project, you’ve just created for your tourManager24 API Key.

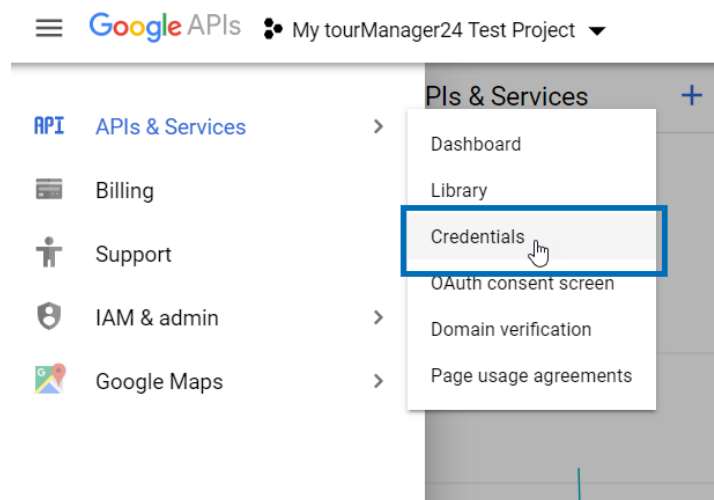
In the next step, you’ve to enable different Google APIs. Got to APIs & Services → Library.



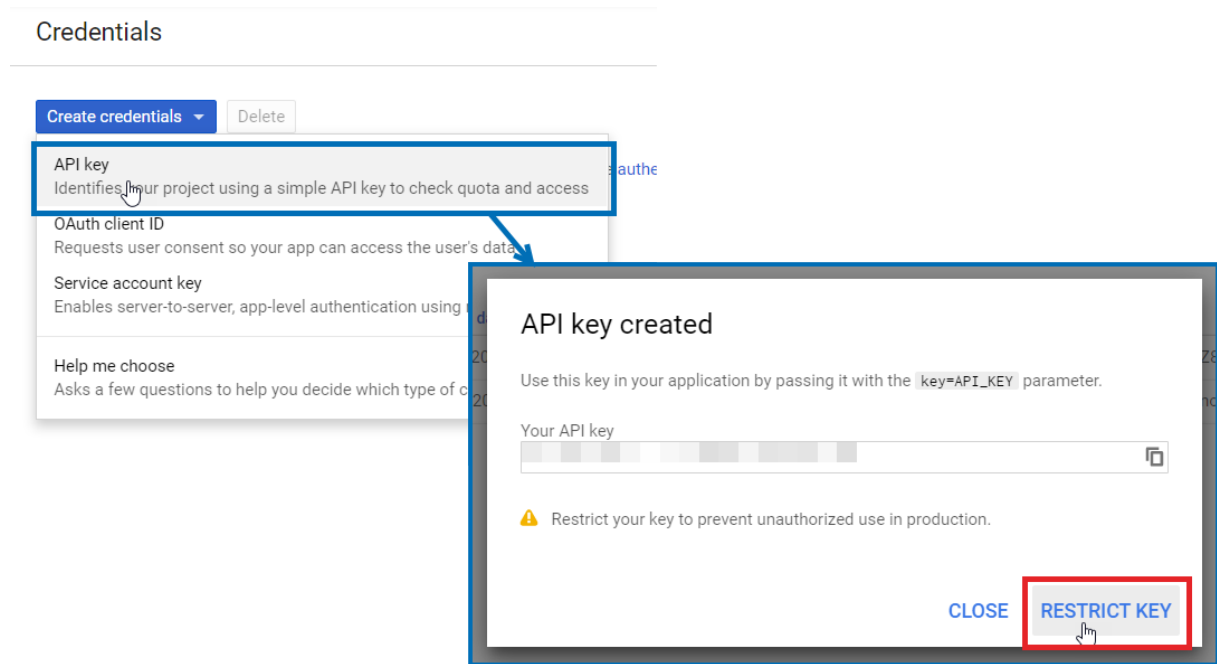
Choose “Geocoding API” and click “Enable”. Repeat this step also with: “Directions API” & “Maps JavaScript API”.



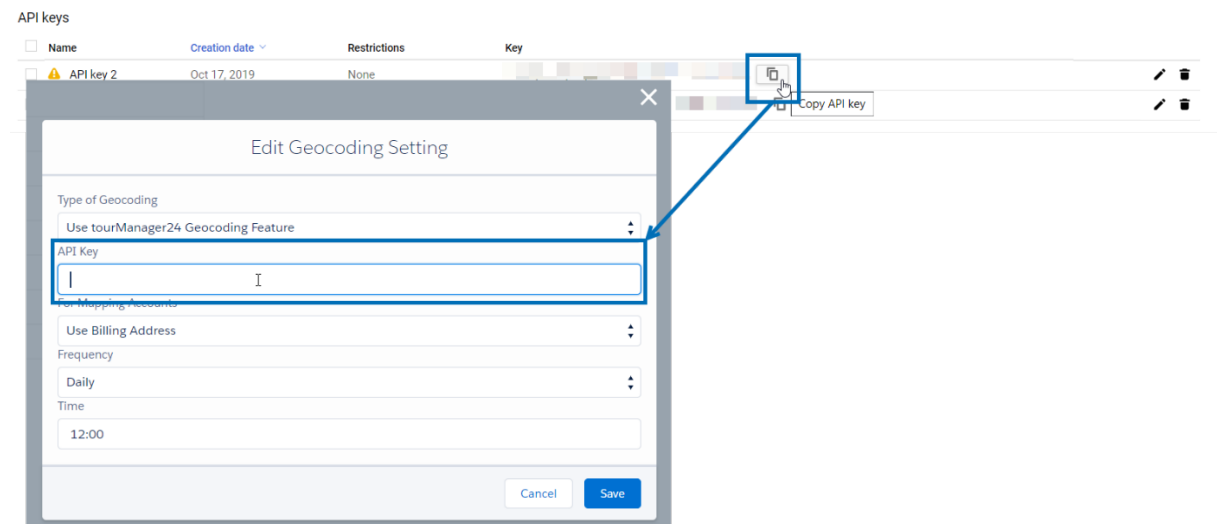
In a final step, you’ve to go to API & Services → Credentials.



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”.

Navigation tabs: [GEOCODE STATUS](#) | [GEOCODE SETTING](#) | [NOTIFICATION](#)

[Start Geocoding](#)

Geocode (tourManager24 Geocoding)

OBJECT NAME	SUCCESSFULLY GEOCODED	INCOMPLETE ADDRESS	NEED GEOCODING	CAN'T BE GEOCODED
Account	537	13	0	80
Contact	679	2	0	5
Lead	534	1	0	3

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.

Choose Objects To Geocode

\* Objects

- Account
- Contact
- Lead

[Cancel](#) [Continue](#)

### 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.

GEOCODE STATUS		GEOCODE SETTING		NOTIFICATION	
Type of Geocoding	tourManager24: Geocode Job				
For Mapping Accounts	Billing				
Objects To Geocode	Account,Contact,Lead				
Frequency	Daily				
Weekday(s)					
Time	12:00 PM				
Next Fire Date	17.3.2020				
Last Fire Date	20.2.2020				
Status	Waiting				

[Edit](#)

### 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”.

The screenshot shows the 'Edit Geocoding Setting' dialog box with the following configuration:

- Type of Geocoding: Use tourManager24 Geocoding Feature
- API Key: [Redacted]
- For Mapping Accounts: Use Billing Address
- Objects to be geocoded:  Account,  Contact,  Lead
- Frequency: Weekly
- Weekday(s): Mon, Tue, **Wed**, Thu, Fri, Sat, **Sun**
- Time: 12:00

Buttons: Cancel, Save

Edit Geocoding Setting  
 Type of Geocoding  
 Use tourManager24 Geocoding Feature  
 API Key  
 For Mapping Accounts  
 Use Billing Address  
 Objects to be geocoded  
 Account  Contact  Lead  
 Frequency  
 Monthly  
 Time  
 12:00  
 Cancel 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.

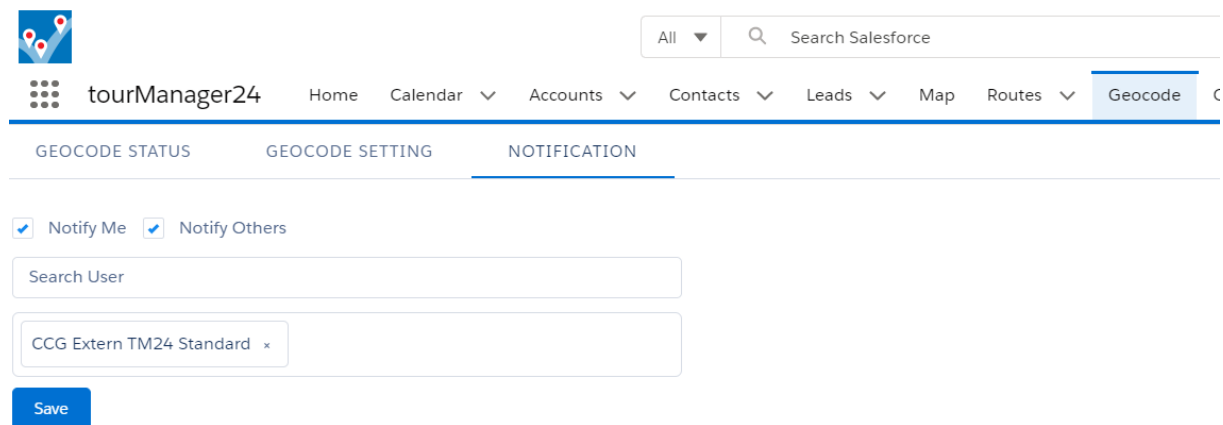
Edit Geocoding Setting  
 Type of Geocoding  
 Use tourManager24 Geocoding Feature  
 API Key  
 For Mapping Accounts  
 Use Billing Address  
 Objects to be geocoded  
 Account  Contact  Lead  
 Frequency  
 Monthly  
 Time  
 12:00  
 Cancel Save

## 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.

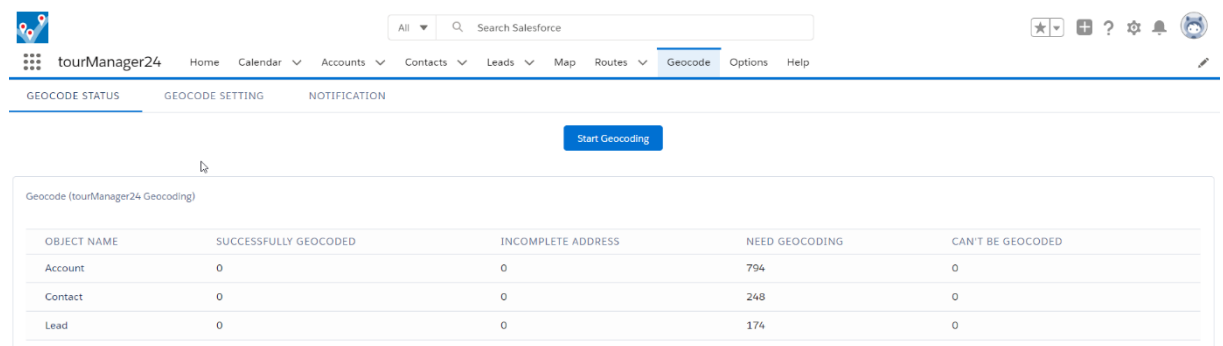
You can either choose Notify Me (default) or add additional Salesforce Users by clicking Notify Others and then choose users who should receive an email when geocoding is completed.



The screenshot shows the Salesforce Geocode Notification settings page. At the top, there is a navigation bar with the 'Geocode' tab selected. Below the navigation bar, there are three tabs: 'GEOCODE STATUS', 'GEOCODE SETTING', and 'NOTIFICATION'. The 'NOTIFICATION' tab is active. Under this tab, there are two checkboxes: 'Notify Me' (checked) and 'Notify Others' (unchecked). Below these checkboxes is a 'Search User' input field. A dropdown menu is open, showing 'CCG Extern TM24 Standard' with a close button. At the bottom of the notification settings, there is a blue 'Save' button.

### 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.



The screenshot shows the Salesforce Geocode Status overview page. At the top, there is a navigation bar with the 'Geocode' tab selected. Below the navigation bar, there are three tabs: 'GEOCODE STATUS', 'GEOCODE SETTING', and 'NOTIFICATION'. The 'GEOCODE STATUS' tab is active. A blue 'Start Geocoding' button is visible. Below the button is a table showing the geocoding status for Accounts, Contacts, and Leads. The table has five columns: 'OBJECT NAME', 'SUCCESSFULLY GEOCODED', 'INCOMPLETE ADDRESS', 'NEED GEOCODING', and 'CAN'T BE GEOCODED'. The data is as follows:

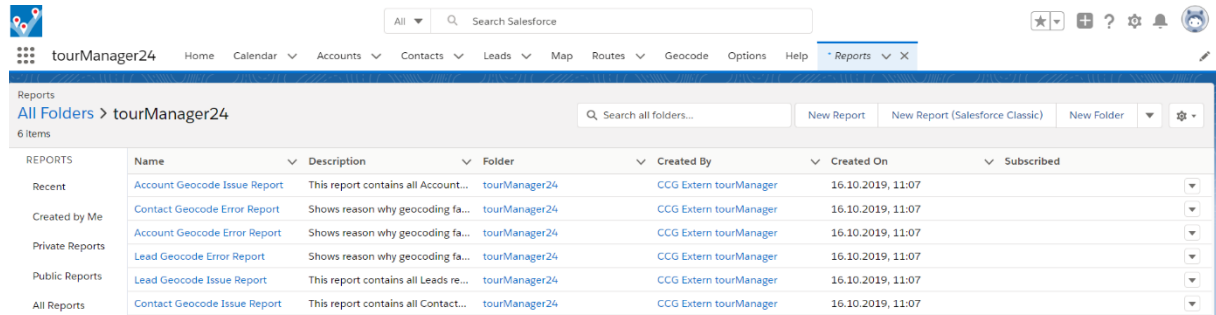
OBJECT NAME	SUCCESSFULLY GEOCODED	INCOMPLETE ADDRESS	NEED GEOCODING	CAN'T BE GEOCODED
Account	0	0	794	0
Contact	0	0	248	0
Lead	0	0	174	0

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.

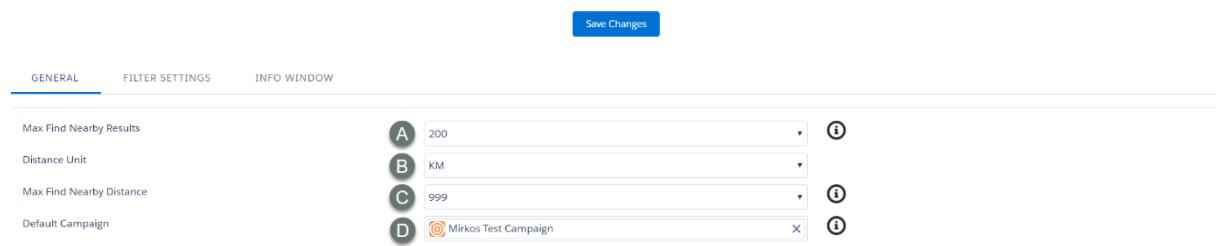
The “Account Geocode Error Report” provides details on geocoding issues of accounts if a validation rule or a required field was the reason of the failure, the “Contact Geocode Error Report” provides details on geocoding issues of contacts if a validation rule or a required field was the reason of the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

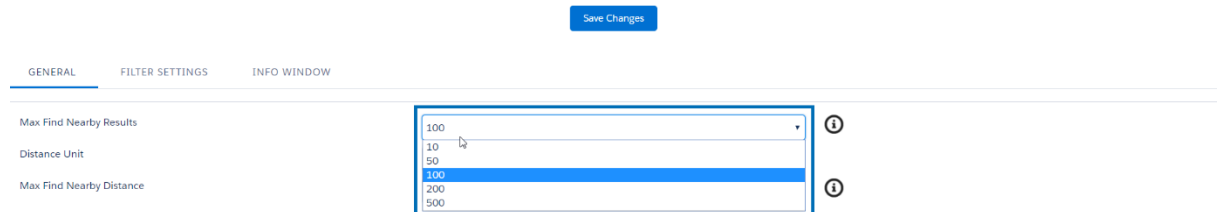
### 2.1 General

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.

**Setup Data Custom Field**  
**Max Results (Managed)**  
[Back to Setup Data](#)

This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Custom Field Definition Detail**  
[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#) [Where is this used?](#)

**Field Information**

Field Label	Max Results	Object Name	Setup_Data
Field Name	Max_Results	Data Type	Picklist
Namespace Prefix	FNB		
API Name	FNB__Max_Results__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	CCG Extern tourManager: 16.10.2019 11:07	Modified By	CCG Extern tourManager: 16.10.2019 11:07

**Package Information**

Installed Package	tourManager24	Available in Versions	6.0 - Current
-------------------	---------------	-----------------------	---------------

**General Options**

Required

Default Value [i](#)

**Picklist Options**

Restrict picklist to the values defined in the value set

Controlling Field [\[New\]](#)

**Field Dependencies** [New](#) [Field Dependencies Help ?](#)

No dependencies defined.

**Validation Rules** [New](#) [Validation Rules Help ?](#)

No validation rules defined.

**Values** [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#) [Values Help ?](#)

Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	10	10	<input type="checkbox"/>	Assigned dynamically	CCG Extern tourManager: 16.10.2019 11:07
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	50	50	<input type="checkbox"/>	Assigned dynamically	CCG Extern tourManager: 16.10.2019 11:07
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	100	100	<input checked="" type="checkbox"/>	Assigned dynamically	CCG Extern tourManager: 16.10.2019 11:07
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	200	200	<input type="checkbox"/>	Assigned dynamically	CCG Extern tourManager: 16.10.2019 11:07
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	500	500	<input type="checkbox"/>	Assigned dynamically	CCG Extern tourManager: 16.10.2019 11:07

**Inactive Values**

No Inactive Values values defined.

[^ Back To Top](#) Always show me [more](#) records per related list

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.

The screenshot shows a settings panel with a 'Save Changes' button at the top. Below the button are three tabs: 'GENERAL', 'FILTER SETTINGS', and 'INFO WINDOW'. Under the 'GENERAL' tab, there are three settings: 'Max Find Nearby Results' (set to 100), 'Distance Unit' (set to KM), and 'Max Find Nearby Distance'. The 'Distance Unit' dropdown menu is highlighted with a blue box, showing options for 'KM', 'Miles', and 'KM'.

### 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.

The screenshot shows a settings panel with a 'Save Changes' button at the top. Below the button are three tabs: 'GENERAL', 'FILTER SETTINGS', and 'INFO WINDOW'. Under the 'GENERAL' tab, there are three settings: 'Max Find Nearby Results' (set to 100), 'Distance Unit' (set to KM), and 'Max Find Nearby Distance'. The 'Max Find Nearby Distance' dropdown menu is highlighted with a blue box, showing options for '99', '99', and '999'.

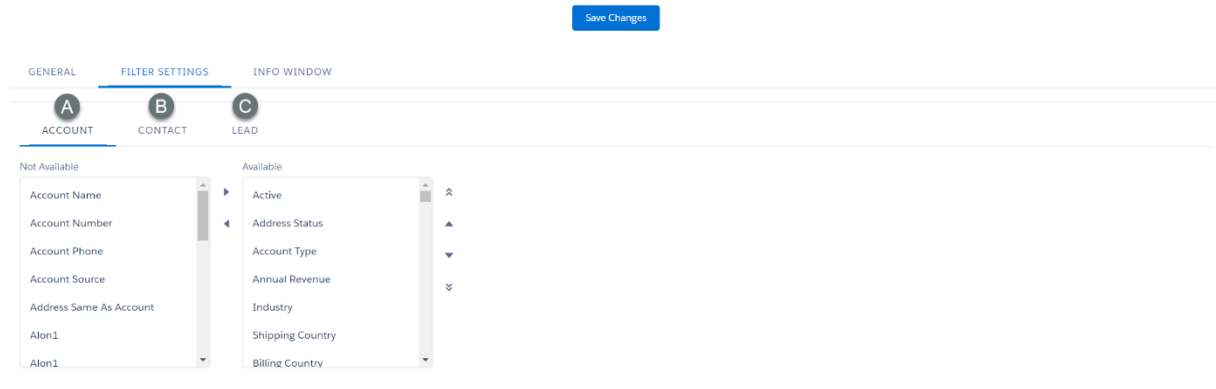
### 2.1.4 Default Campaign

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.

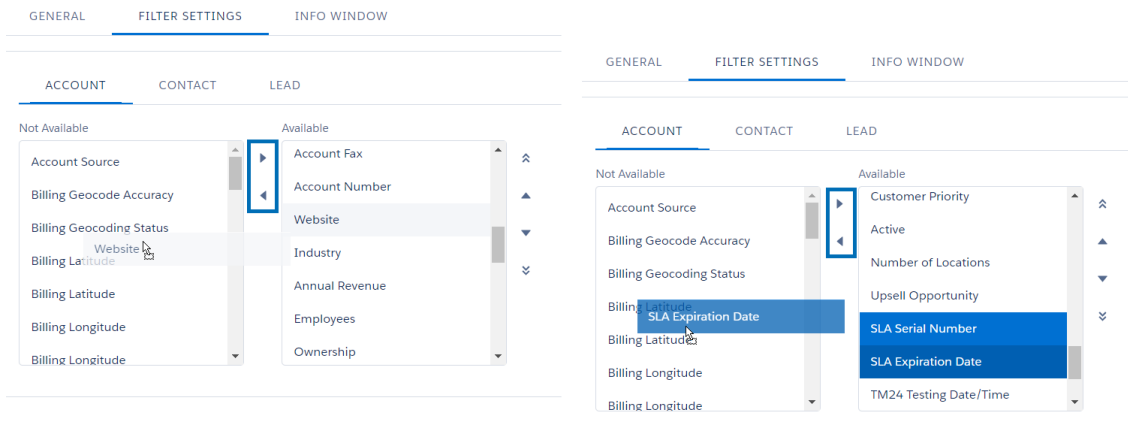
The screenshot shows a settings panel with a 'Save Changes' button at the top. Below the button are three tabs: 'GENERAL', 'FILTER SETTINGS', and 'INFO WINDOW'. Under the 'GENERAL' tab, there are four settings: 'Max Find Nearby Results' (set to 100), 'Distance Unit' (set to KM), 'Max Find Nearby Distance' (set to 999), and 'Default Campaign'. The 'Default Campaign' dropdown menu is highlighted with a blue box, showing a search input field with 'Lond' and a magnifying glass icon, and a result card for 'London Leadtour' with a target icon.

## 2.2 Filter Settings

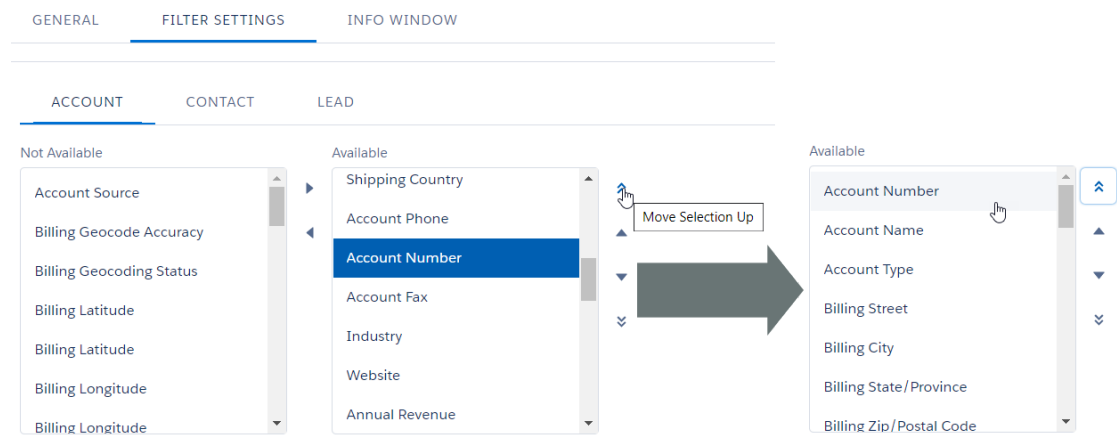
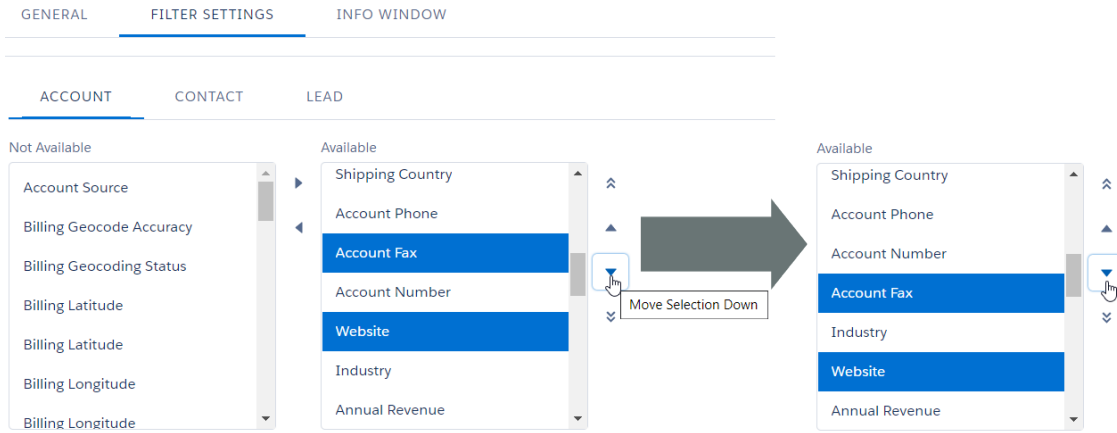
In the subtab FILTER SETTINGS of the Options page you can define the fields that are available when you add a filter to the search. You can save different values for your ACCOUNT (A), CONTACT (B) and LEAD (C) by clicking on each of the subtabs.



You can add 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.

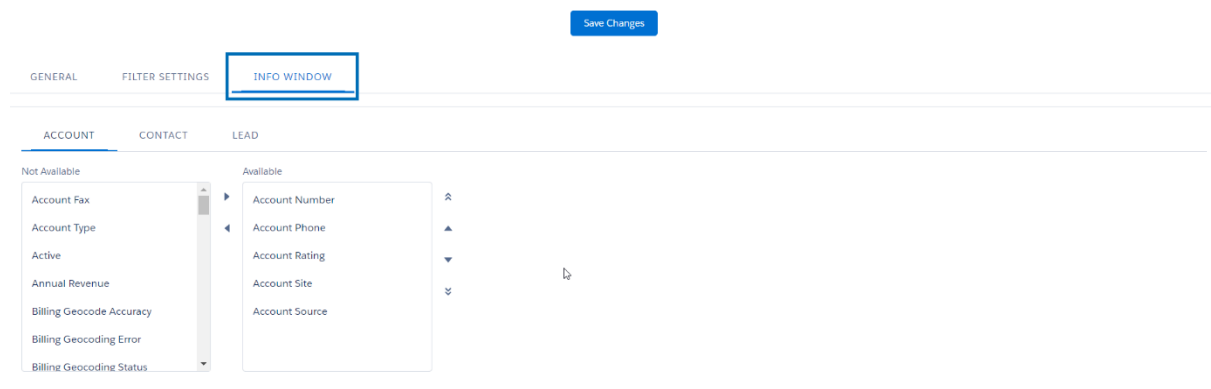


Also, you can move one field or multiple fields either right to the top or bottom via using the outer arrows on the right of the column “Available” or only one position up or down with the inner arrows.

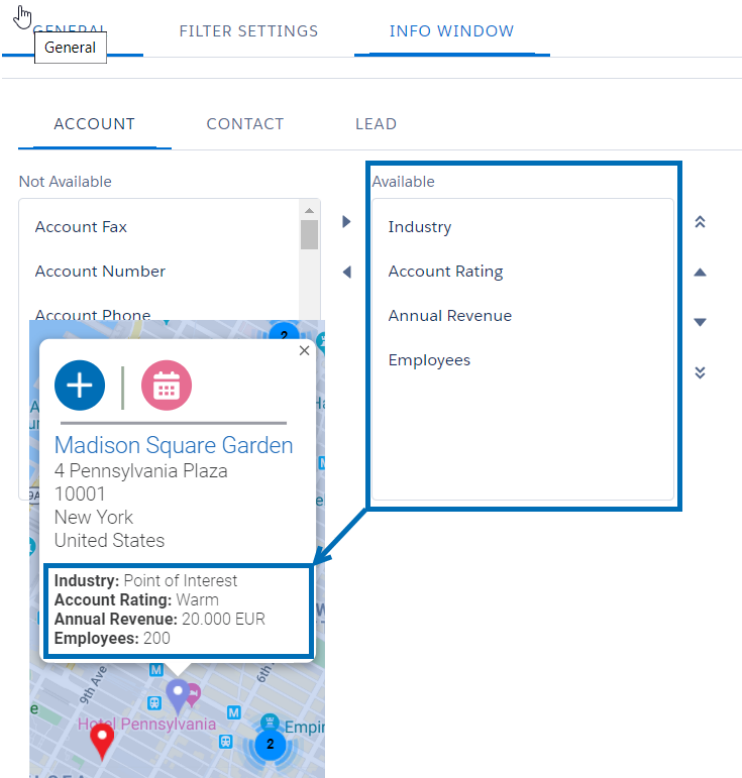


## 2.3 Info Window Settings

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



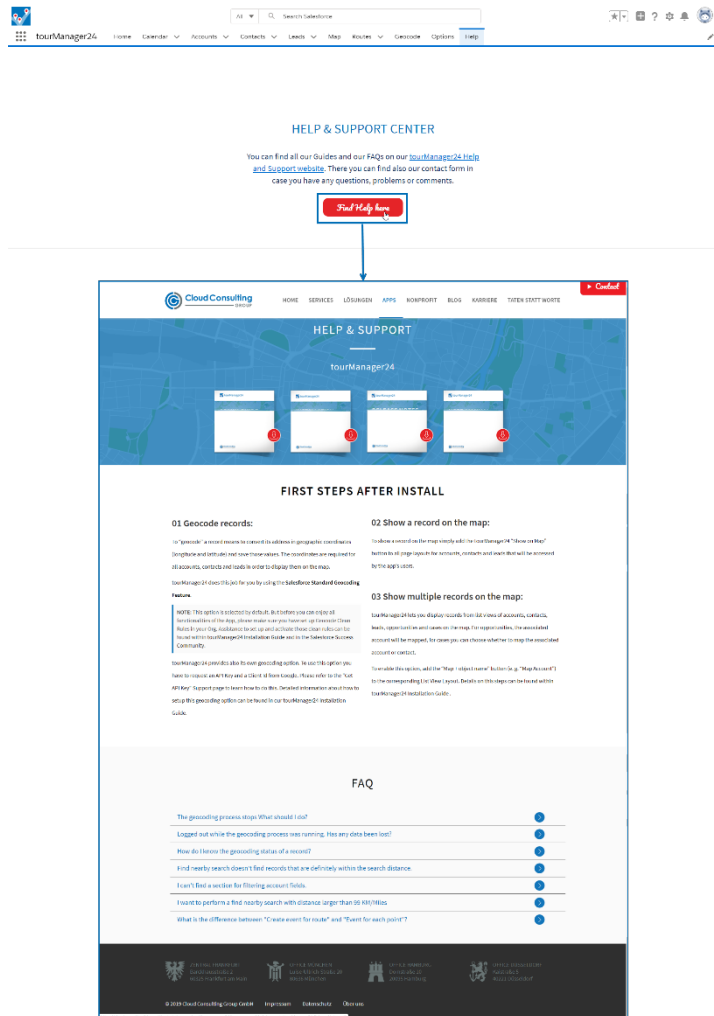
Fields which you make available show up below the address of the record mapped.



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

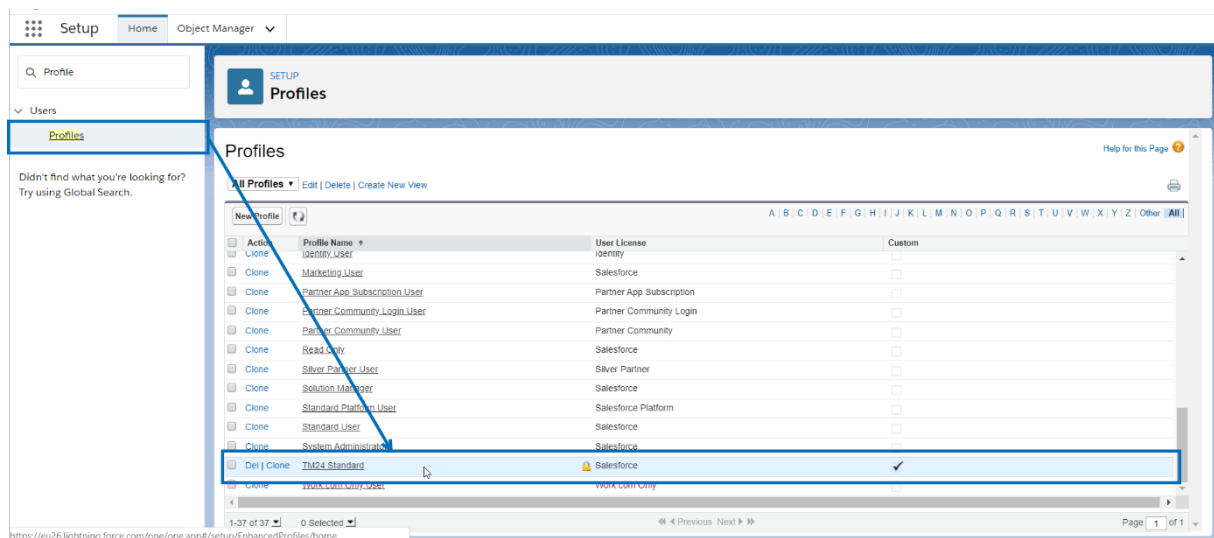
Under this tab, you can find a link which directly forwards you to our tourManager24 Help & Support Center. Here, you can find all our documentation for Admins and Users and the most current FAQs. Additionally, you can contact us via our contact form.



# 4 PERMISSIONS

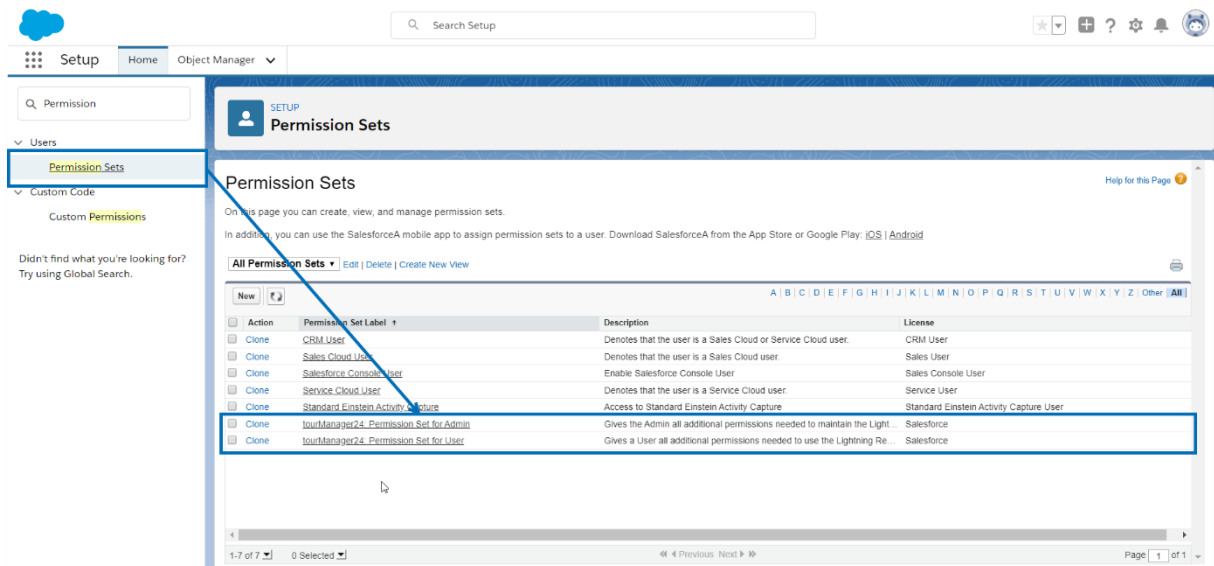
This section gives an overview on which tabs, objects, Visualforce pages, Apex Classes and Triggers must be enabled for administrators and user profiles to make tourManager24 available.

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 tourManager24 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

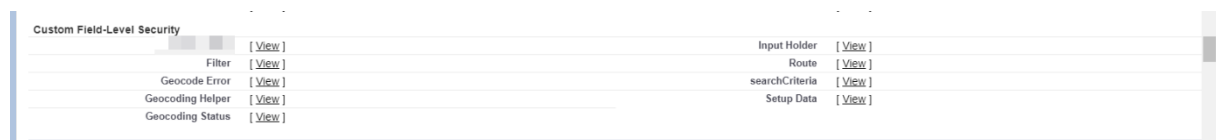
Assign this permission set to every tourManager24 user.

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

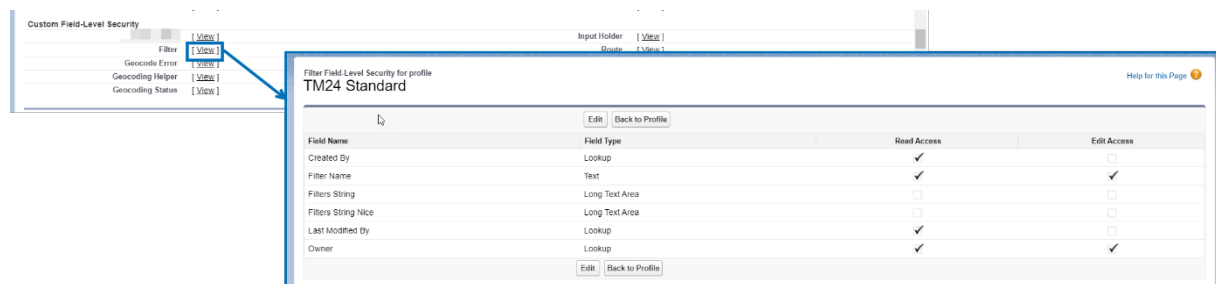
## 4.2 Field Level Security

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.

Custom App Settings		Visible	Default	Custom App Settings		Visible	Default
Analytics Studio (standard__Insights)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)		<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing (standard__Marketing)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	tourManager24 (FNB__Find_Nearby_lghtn)		<input type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	tourmanager24 (FNB__Find_Nearby)		<input type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Work.com (standard__Work)		<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 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.

The screenshot shows the 'Custom Object Permissions' configuration page. It features two tables side-by-side. The left table lists objects: Error Trackings, Filters, Geocode Errors, Geocoding Helper, and Geocoding Status. The right table lists objects: Input Holder, Routes, searchCriteria, and Setup Data. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). In both tables, the 'Basic Access' columns for the specified objects are checked, and these rows are highlighted with a blue box.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Error Trackings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Filters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geocode Errors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geocoding Helper	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geocoding Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Input Holder	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Routes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
searchCriteria	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Setup Data	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 4.6 Enabled Apex Class Access

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

Apex Class Name	Installed Package
FNB.addFilter_ctrl	tourManager24
FNB.CalcLatLongCont	tourManager24
FNB.DeleteRouteWithEventsCont	tourManager24
FNB.DeleteRouteWithEventsCtrl	tourManager24
FNB.DrivingInstructionsCont	tourManager24
FNB.EmailRouteCont	tourManager24
FNB.EnterAddressCont	tourManager24
FNB.filterHandling	tourManager24
FNB.filterHandling1	tourManager24
FNB.findNearByCont	tourManager24
FNB.geocodeJob	tourManager24
FNB.MannualGeocode	tourManager24
FNB.MannualGeocodeJob	tourManager24
FNB.MannualGeocodeMockHttpResponseGenerator	tourManager24
FNB.MockHttpResponseGenerator	tourManager24
FNB.PostInstallClass	tourManager24
FNB.SaveRouteContModal	tourManager24
FNB.SaveRouteModalCont	tourManager24
FNB.saveSingleEventWapCont	tourManager24
FNB.setFiltersCont	tourManager24
FNB.updateGeocodeJob	tourManager24
FNB.updateGeocodingHelper	tourManager24

## 4.7 Enabled Visualforce Page Access

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

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_goToTrackingTool_Lead	tourManager24
FNB_goToTrackingTool_Leads	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_showRouteOnlMap	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.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Installed' and a navigation menu with 'Apps' and 'Packaging' expanded to show 'Installed Packages'. The main content area is titled 'Installed Packages' and contains a table of installed packages. The table has columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, Used Licenses, Expiration Date, Install Date, Limits, Apps, Tabs, Objects, and AppExchange Ready. The 'tourManager24' package is highlighted, and a blue box with an arrow points to the 'Manage Licenses' link in its Action column.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall	Salesforce and Chatter Apps	Salesforce.com	1.19	sf_chtr_apps	Free	N/A	N/A	N/A	08.05.2019 09:54		0	0	0	Passed
Uninstall <a href="#">Manage Licenses</a>	tourManager24	Cloud Consulting Group	6.0	FNB	Active	100	2	15.11.2019 11:08	16.10.2019 11:08		2	5	10	Passed

# 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.

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## 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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