



RELEASE NOTES

VERSION 6.1 | MARCH 2020

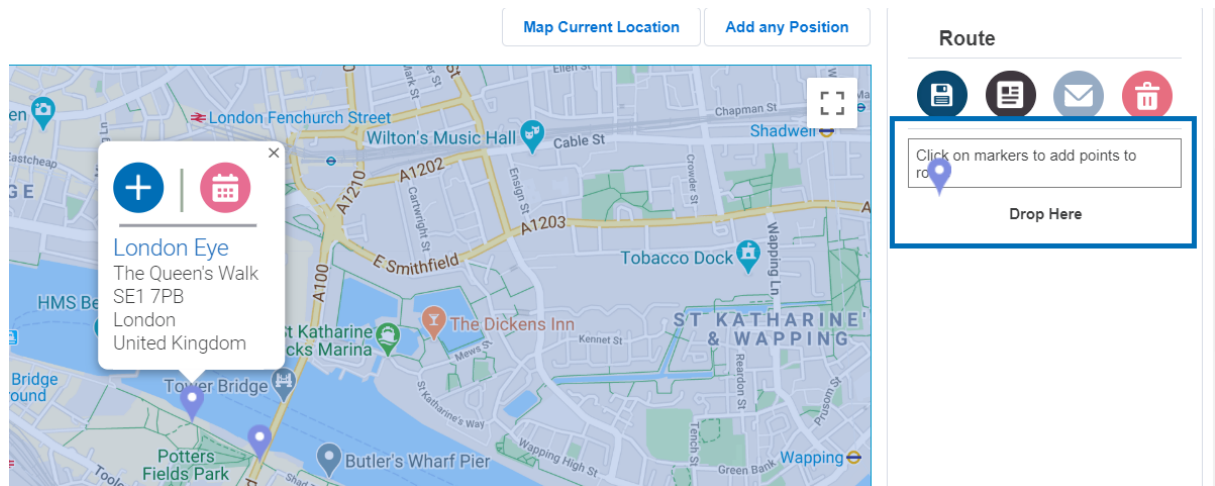
Content

- 1 Adding points to Route via Drag & Drop2
- 2 Choose which Objects to geocode2
- 3 Store manually entered addresses for reuse4
- 4 Routes without Events for other Users5
- 5 Add Leads & contacts to campaign5
- 6 New Route Email Template7
- 7 Resolved Issues7
- Contact And Support8
 - Installation Guide8
 - Admin Guide8
 - User Manual.....8
 - Support.....8
 - About Us.....8
 - Contact.....8

1 ADDING POINTS TO ROUTE VIA DRAG & DROP

With our new version 6.1 of tourManager24 it is now very easy to drag and drop markers from the map into a route.

Simply drag one of the markers from the map to the right-hand side into the "Route" section.



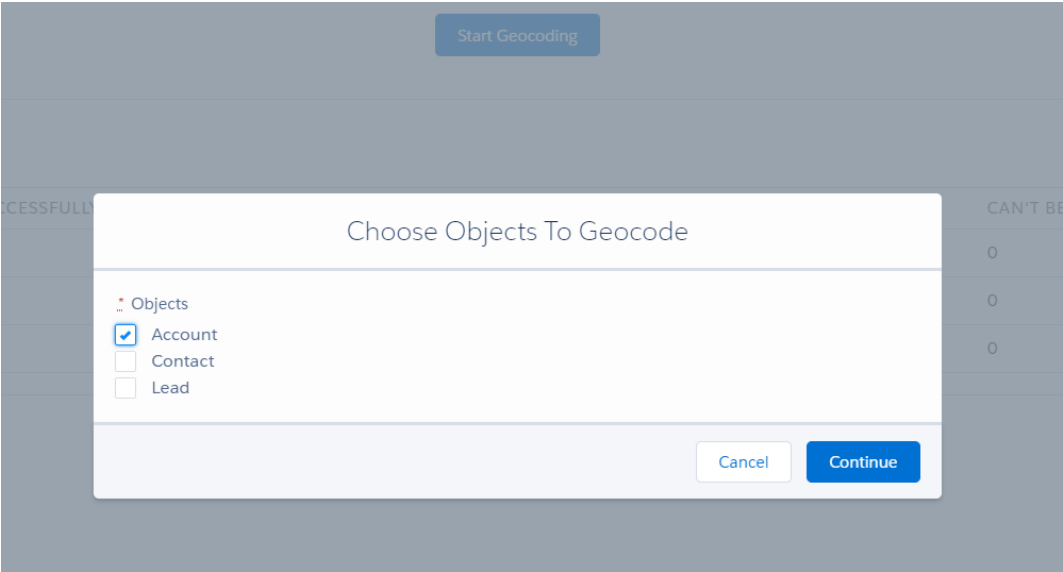
2 CHOOSE WHICH OBJECTS TO GEOCODE

This change only applies to the tourManager24 Geocoding setting:

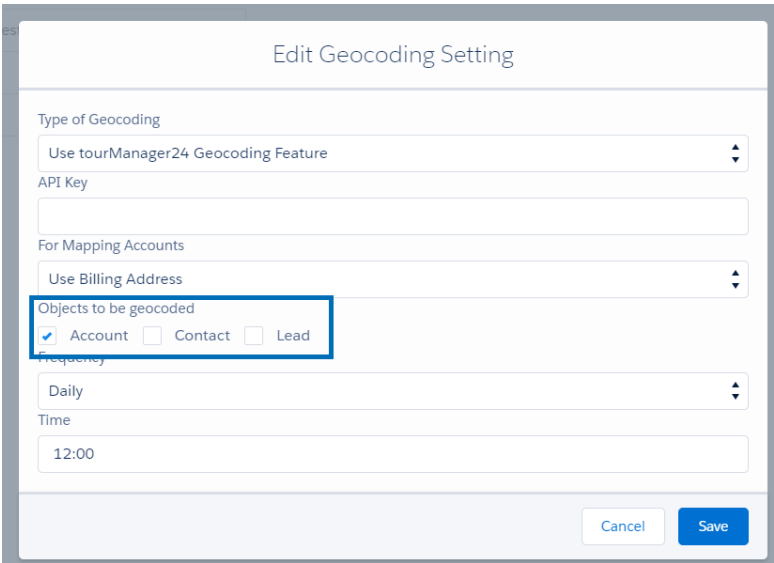
As an Admin you can choose whether to geocode Contacts, Accounts and Leads or only one or two of these Objects. In order to do so, we have implemented checkboxes for you.

There are two new ways to start the Geocoding Job:

(1) manually: As soon as you click on "Start Geocoding"-Button on the Geocode overview page there is the possibility to choose which object you want to geocode.



(2) automatic: Under the options to choose the address for geocoding Account, choosing a time etc. there is also the option to choose the Object to geocode.



3 STORE MANUALLY ENTERED ADDRESSES FOR REUSE

It's possible to map an address by entering at least a street and a city manually on the Map Tab. In some use cases, this manually entered addresses is reused for some reason different times. That's why we implemented a possibility for you to save these addresses in order to use them again later on.

The image shows a two-part interface. The top part is a form titled "Or enter address manually:" with four input fields: "Name" (containing "My Home Base"), "Street" (containing "48 Leicester Square"), "Postal Code" (empty), and "City" (containing "London"). Below the fields are three buttons: "Select Saved Address", "Save & Show On Map", and "Show On Map". The "Save & Show On Map" button is highlighted with a blue box. A blue arrow points from this button to the bottom part of the image, which is a "Saved Address" modal window. This window contains a table with three rows of saved addresses. The first row is "Test Stef" at "Karl-Marx-Straße 66" in Berlin. The second row is "big ben" at "Big Ben" in London. The third row is "My Home Base" at "48 Leicester Square" in London. Each row has a red "Delete" button. The "My Home Base" row is highlighted with a blue box. A "Close" button is at the bottom right of the modal.

Name	Street	Postal Code	City	
Test Stef	Karl-Marx-Straße 66		Berlin	Delete
big ben	Big Ben		London	Delete
My Home Base	48 Leicester Square		London	Delete

4 ROUTES WITHOUT EVENTS FOR OTHER USERS

Since the last Release, you are able to assign Routes to other Users. Nevertheless, this works only for Routes with Events. This is now also possible for Routes without Events.

Save Route

No event Create Event for Route Event for each point

*Route Name

*Assigned To

Cancel Save

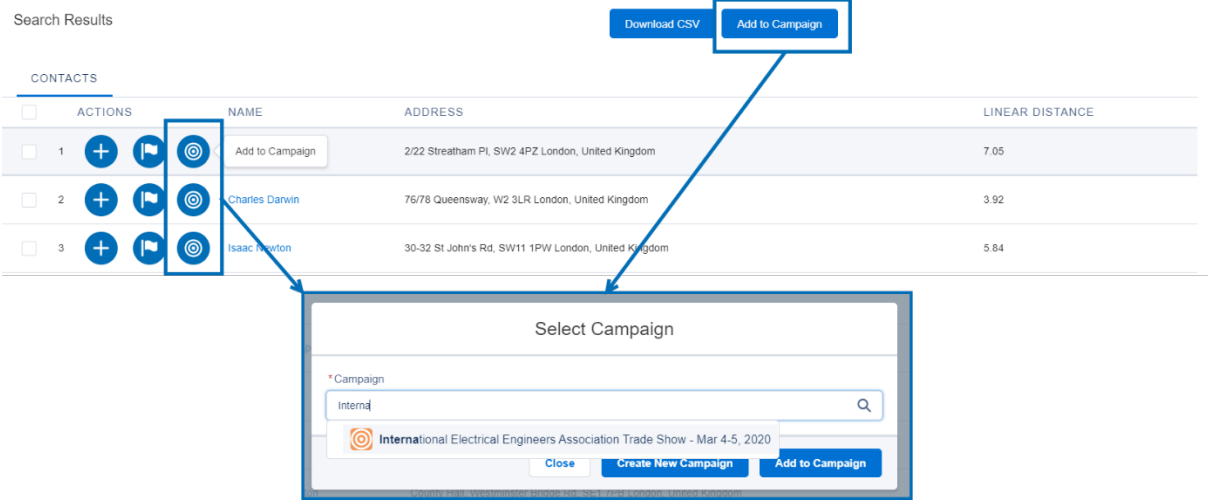
5 ADD LEADS & CONTACTS TO CAMPAIGN

In our latest tourManager24 release, we created the possibility to assign leads & contacts directly from tourManager24 to a campaign.

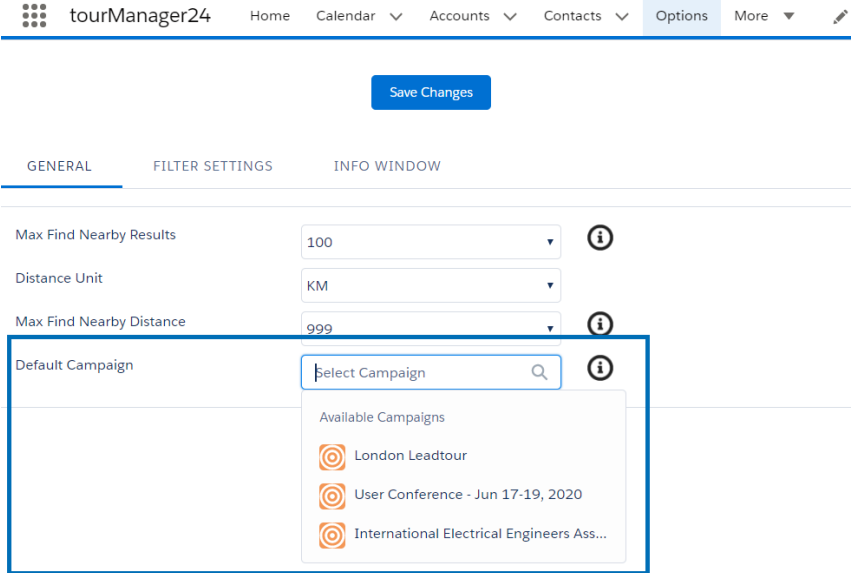
You have several options to add a Lead or Contact record to a campaign:

- Via button in info window
- Via button in list view below map
- Via mass action in list view below map

When you decide to add a Lead or Contact to a campaign, you can click the button Add to Campaign. Then there is a modal where you select a campaign via search. You can also find a button to create a new Campaign. When you click the button you were redirected (in a new browser tab) to the standard campaign creation page layout. When a campaign is selected and you have confirmed, the Lead is added to the campaign.

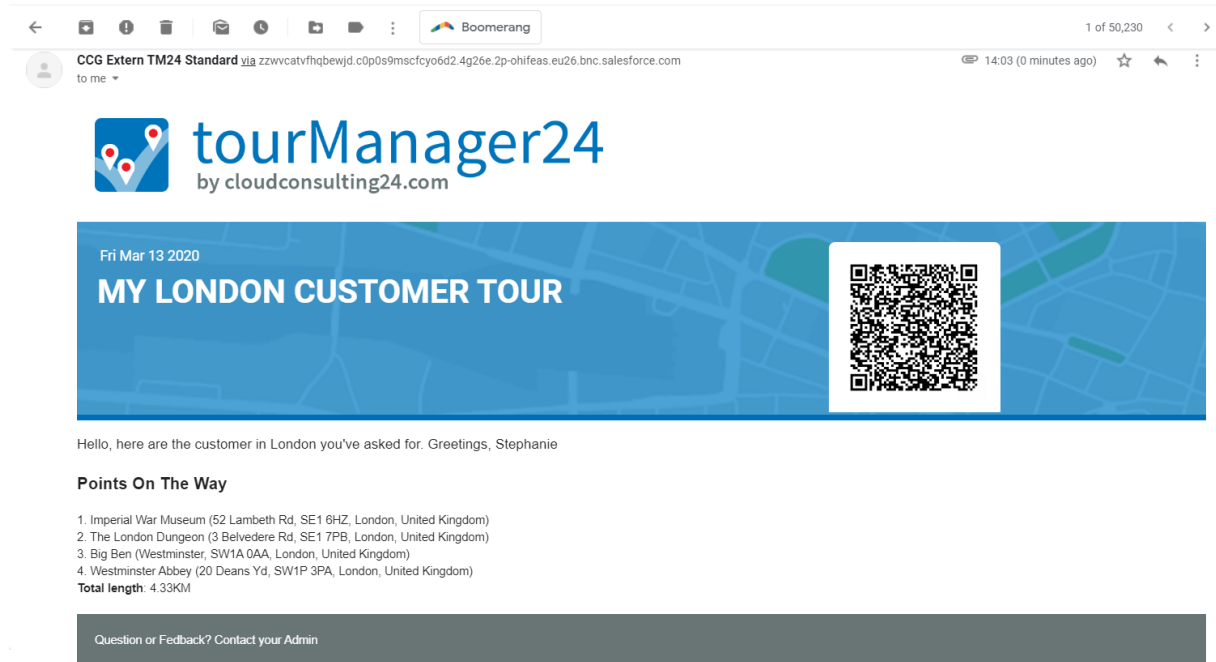


If you want to make it much easier you can define a default campaign in the tourManager24 Options tab.



6 NEW ROUTE EMAIL TEMPLATE

In order to match our new design of the Route PDF the Email template sent through the "Email Route"-Action was also be adopted to have the same look and feel as the PDF file itself. Have a look:



7 RESOLVED ISSUES

- Filter can be set with invalid Email address
- Difficulties with deleting points from a Route on mobile devices

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](#).

Admin Guide

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

User Manual

For more detailed information about the tourManager24 app functionalities please read the [tourManager24 User Manual](#).

Support

Please feel free to contact us [online](#) for further support, open questions and feedback.

About Us

Cloud Consulting Group – Your partner for Cloud IT!

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

Contact

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

