



Map View

Extension for Zoho CRM

Map View

Map view is an extension which helps the user to visualize their desired Zoho CRM data geographically on maps. These can be your leads, accounts, contacts, deals or either any of your customized module in Zoho CRM. Get a bird's eye view of your data with this powerful Zoho CRM extension.

Syncing of Data

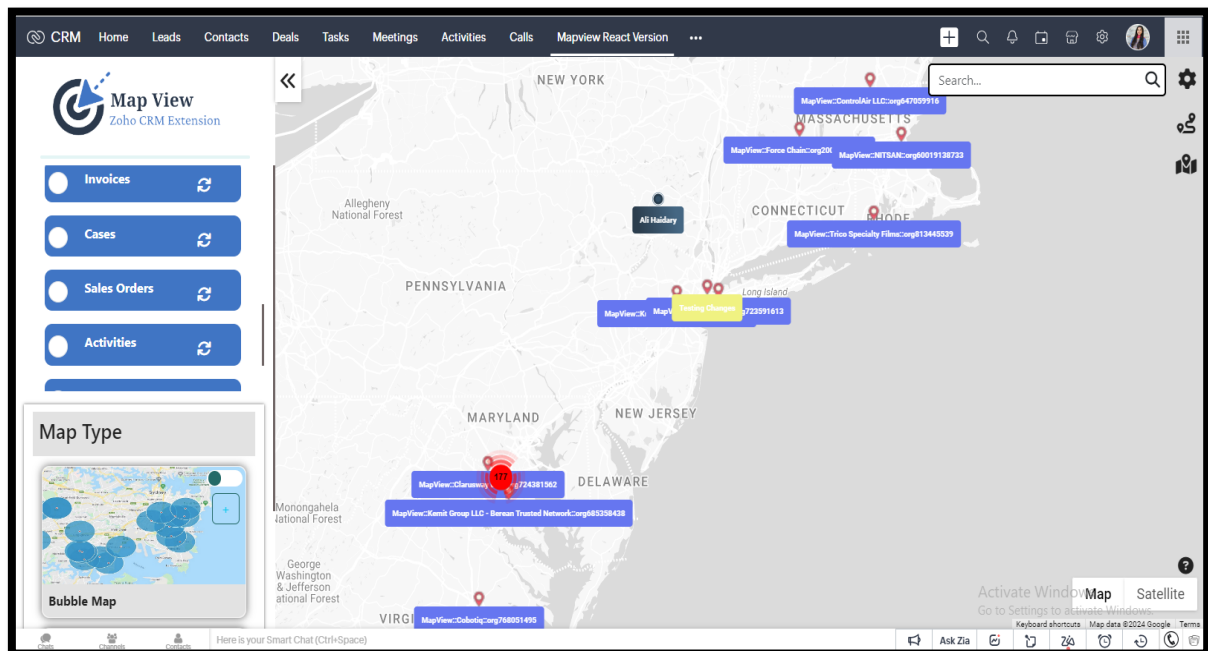
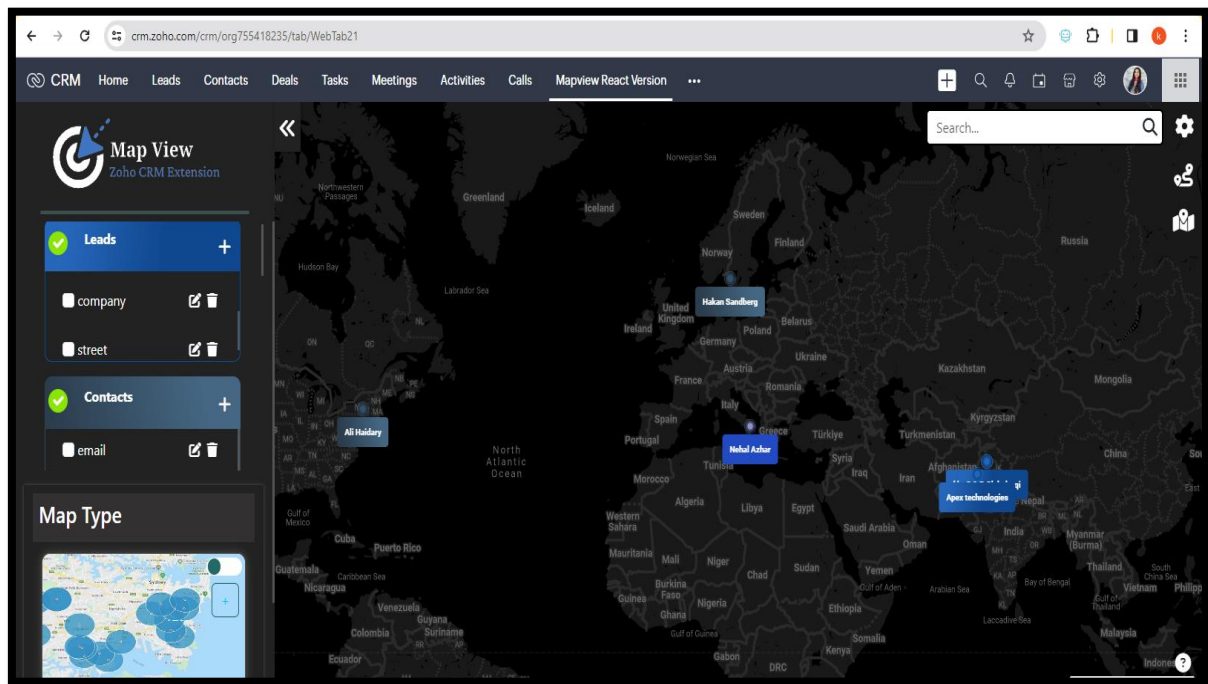
After Installation, you need to Sync the data from any of your desired module to the Map View by making selections. Select the records of your desired module and then hit the "Sync Map View" button. The pop-up shows the stats of the success and failed to sync records. While syncing your data it must contain address fields in the record for map view to fetch the latitude and longitude of the data to represent its location on maps.

The screenshot displays a CRM application interface. At the top, there's a navigation bar with tabs for 'Home', 'Leads', 'Contacts', and 'Projects'. The 'Contacts' tab is active. Below the navigation bar, there's a toolbar with buttons for 'Send Email', 'Create Task', 'Mass Update', 'Sync Map View', and 'Actions'. The 'Sync Map View' button is highlighted, and a dropdown menu is open, showing 'Sync Map View' as the selected option. Below the toolbar, there's a section for 'Filter Contacts by' with a search bar and a list of filters. The filters are divided into 'System Defined Filters' and 'Filter By Fields'. The 'System Defined Filters' include 'Touched Records', 'Untouched Records', 'Record Action', 'Related Records Action', 'Activities', 'Notes', 'Deals', 'Deal Amount', 'Deal Stage', 'Deal Owner', 'Deal Closing Date', and 'Campaigns'. The 'Filter By Fields' include 'Account Name' and 'Assistant'. The main table displays a list of contacts with columns for 'Contact Name', 'Account Name', 'Email', and a phone number. The contacts listed are: friya Contact, Ziya Contact, Khush Contact, Kris Marrier (Sample), Sage Wieser (Sample), Leota Dilliard (Sample), Mitsue Tollner (Sample), Simon Morasca (Sample), Donette Foller (Sample), and Capla Paprocki (Sample). Each contact has a checkbox in the first column, and some have a date badge (e.g., APR 20, APR 22, APR 19, APR 18).

	Contact Name	Account Name	Email	Phone Number
<input checked="" type="checkbox"/>	friya Contact			
<input checked="" type="checkbox"/>	Ziya Contact		zia@gmail.com	0312
<input checked="" type="checkbox"/>	Khush Contact		khushbakhtazzaqi@yahoo.com	
<input checked="" type="checkbox"/>	Kris Marrier (Sample)	King (Sample)	krismarrier@gmail.com	555-
<input checked="" type="checkbox"/>	Sage Wieser (Sample)	Truhlar And Truhlar (Sample)	sage-wieser@truhlar.uk	555-
<input checked="" type="checkbox"/>	Leota Dilliard (Sample)	Commercial Press (Sample)	leota-dilliard@hotmail.com	555-
<input checked="" type="checkbox"/>	Mitsue Tollner (Sample)	Morlong Associates (Sample)	tollner-morlong@gmail.com	555-
<input checked="" type="checkbox"/>	Simon Morasca (Sample)	Chapman (Sample)	simonm@chapman.com	555-
<input checked="" type="checkbox"/>	Donette Foller (Sample)	Printing Dimensions (Sample)	foller-donette@in.com	555-
<input checked="" type="checkbox"/>	Capla Paprocki (Sample)	Feltz Printing Service (Sample)	capla-paprocki@yahoo.com	555-

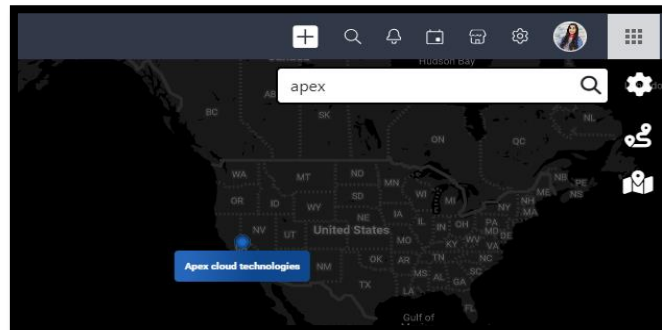
View All/ View Selected

View the data against each module separately by selecting the desired module. You can view overall data on maps if you haven't selected any of the module. Each module is a different color to identify on map whether it is lead, account or contacts.



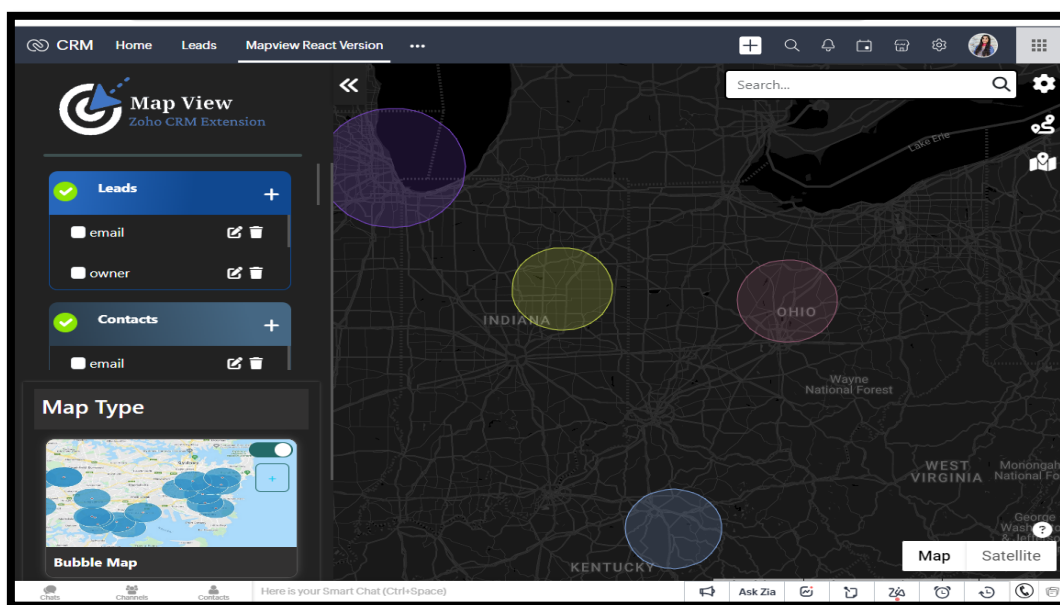
Search

Wild character search allows you to search any record on maps. You can search either module wise or an overall search in the whole data.



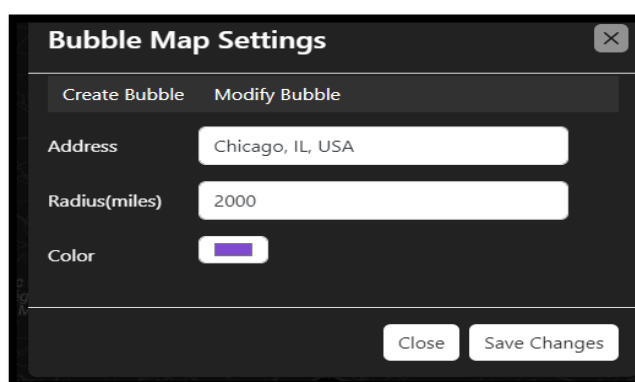
Bubble map

Select the button to turn on bubble map to display the important areas or the desired regions marked by you according to your own business strategy or target.



Add bubble

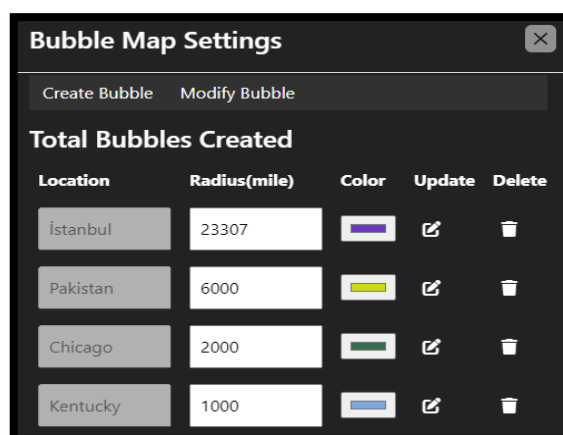
Add bubbles to the desired area covering any of the region or the boundaries that you wish. Add the Address, radius and select the color. Bubble maps are good for comparing proportions over geographic regions without the issues caused by regional area size. Add multiple bubbles covering different range showed by different colors.











The image shows a 'Bubble Map Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'Create Bubble' and 'Modify Bubble'. The 'Create Bubble' tab is active. It contains three input fields: 'Address' with the value 'Chicago, IL, USA', 'Radius(miles)' with the value '2000', and 'Color' with a purple color swatch. At the bottom, there are two buttons: 'Close' and 'Save Changes'.

Update Bubble

The added bubble can also be updated. You can change the radius and color of the bubble and hit save to keep the changes.

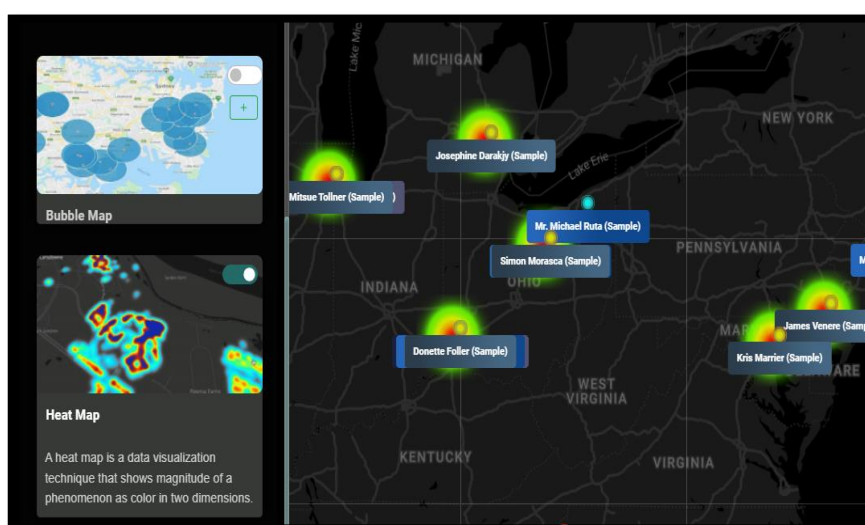


The image shows a 'Bubble Map Settings' dialog box with a close button (X) in the top right corner. It has two tabs: 'Create Bubble' and 'Modify Bubble'. The 'Modify Bubble' tab is active. It displays a table titled 'Total Bubbles Created' with columns: 'Location', 'Radius(mile)', 'Color', 'Update', and 'Delete'. The table contains four rows of data.

Location	Radius(mile)	Color	Update	Delete
Istanbul	23307	Purple		
Pakistan	6000	Yellow		
Chicago	2000	Green		
Kentucky	1000	Blue		

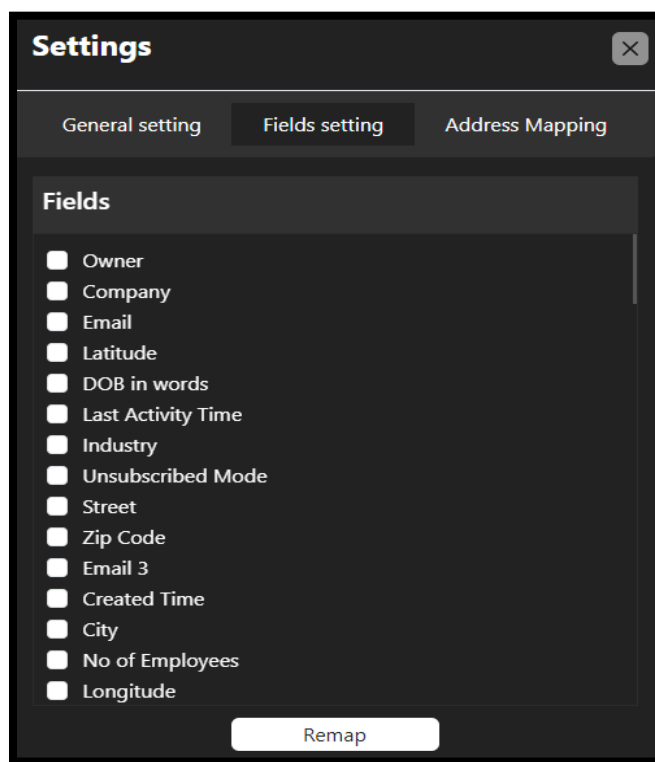
Heat map

Turn on heat map to visualize data and its magnitude as color in two dimensions. The variation in color occurs by the intensity. It basically helps the user to figure out the heat points/ intense points.



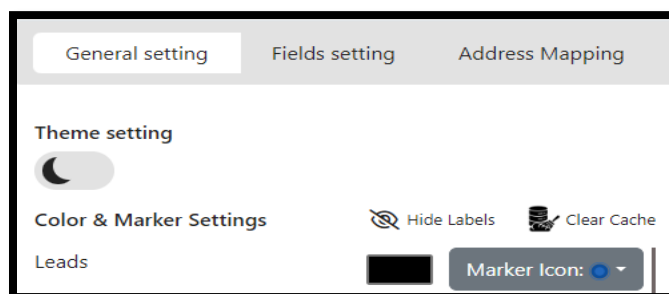
Field Settings:

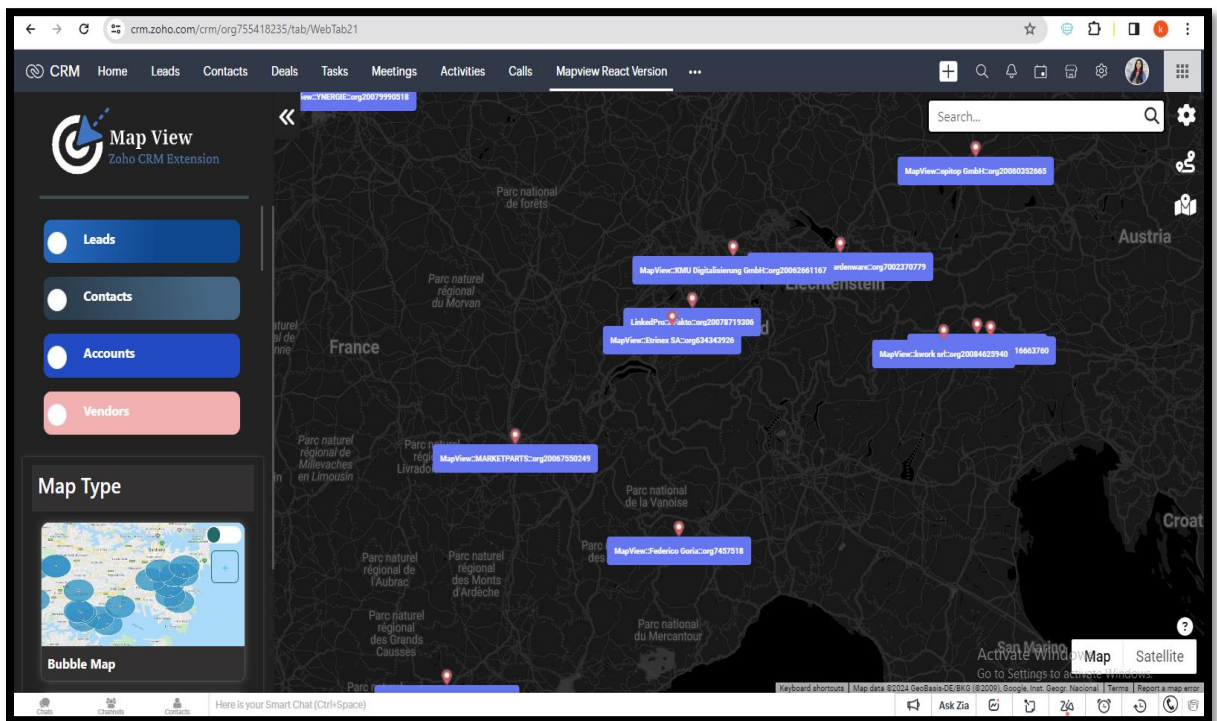
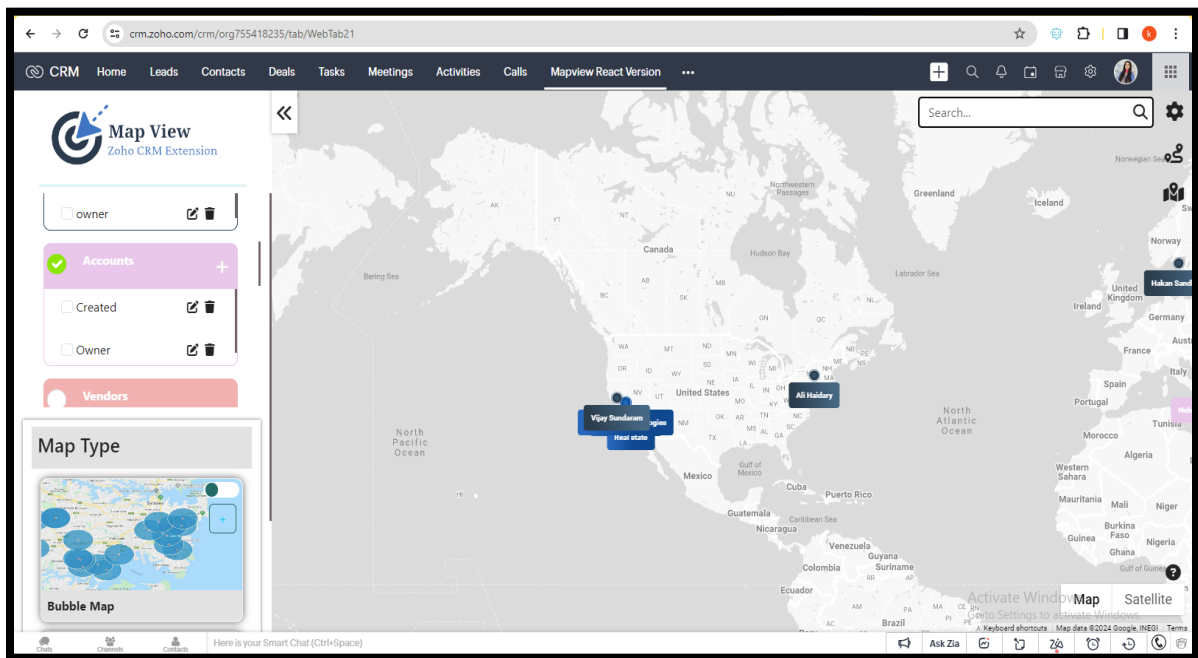
Field settings basically allows you to select the desired fields according to your own wish. It gets all the fields from the standard layout in the CRM module once you add any of the fields in the CRM. Just hit the remap button and all the selected fields will be visible on your map. Remap button allows you to update the fields that you want to see on the maps against each record.



Themes

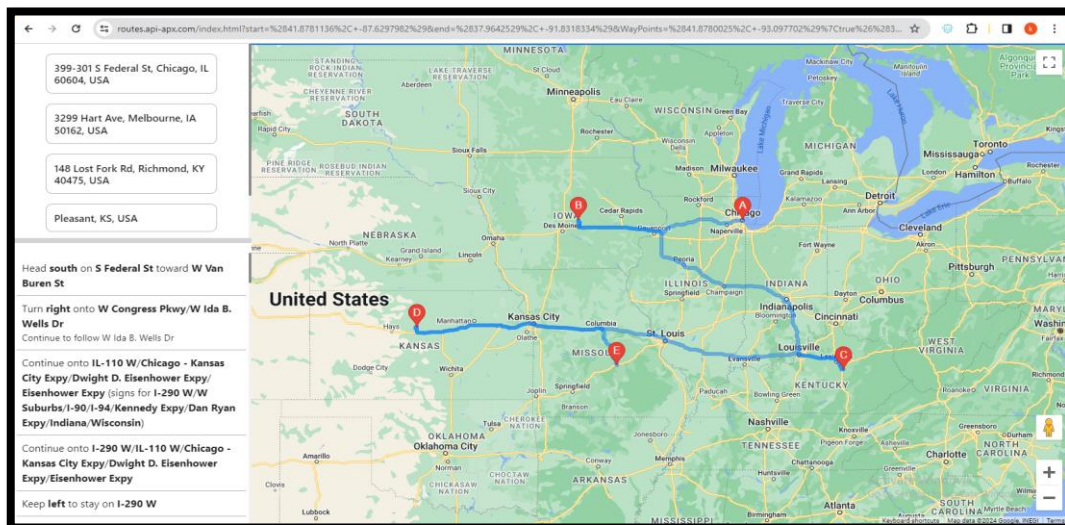
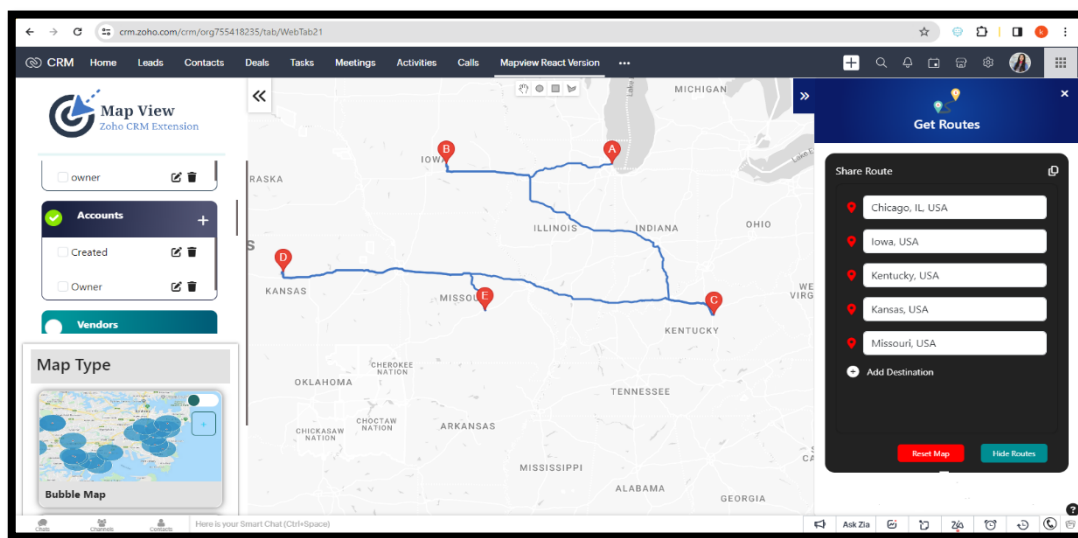
Switch between the dark and light theme through the top right most button for a better visibility. Set the dark theme for a better visibility at night to protect your vision.





Plan Routes:

Map out your journeys by using Map View to generate an optimized route from your starting point to the final destination end point. Plan and share your route with others through a convenient link.



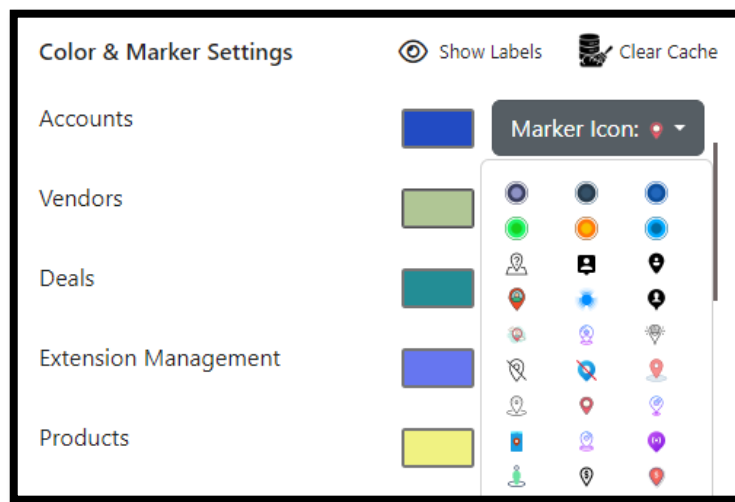
Area Based Routes:

Select a specific area by drawing a boundary with the drawing pallet. All the leads in the selected area will be visible in the destination drop down where you can select or plan route from data to another data located in your provided boundaries.



Pointers Update:

Customizing pointer icons for each module sounds like a great way to visually differentiate between different sets of data on maps. It can help users quickly identify which module's data they're looking at without confusion.



Data Update:

You can seamlessly sync updated data from maps to Zoho CRM without any hassle. Simply edit fields and information directly through maps by clicking on the edit button for records, and Map View will automatically update the changes in Zoho CRM for you.

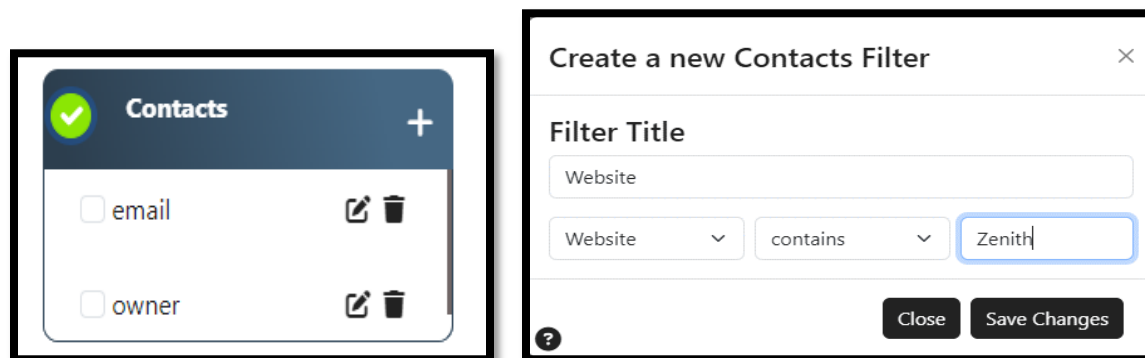
The 'Update Records' dialog box is shown with the following fields and values:

Field	Value
Owner	Ahtisham Ali
Interested in	N/A
Email	aa@zenithinnovations.net
Other Phone	123123123
Mailing State	N/A
MapView Lat...	41.652633
Other State	N/A
Other Country	N/A

At the bottom of the dialog, there are two buttons: 'Discard Changes' (red) and 'Save Changes' (green).

Filters:

Apply filters to any of your desired module. Select a module and click to the + icon to create a filter. Create your filter once and save it for later use. Filters can be edited any time according to your need.



In case of any problem in setting up or installation, feel free to contact us at

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