Launch Points within Microsoft Dynamics 365

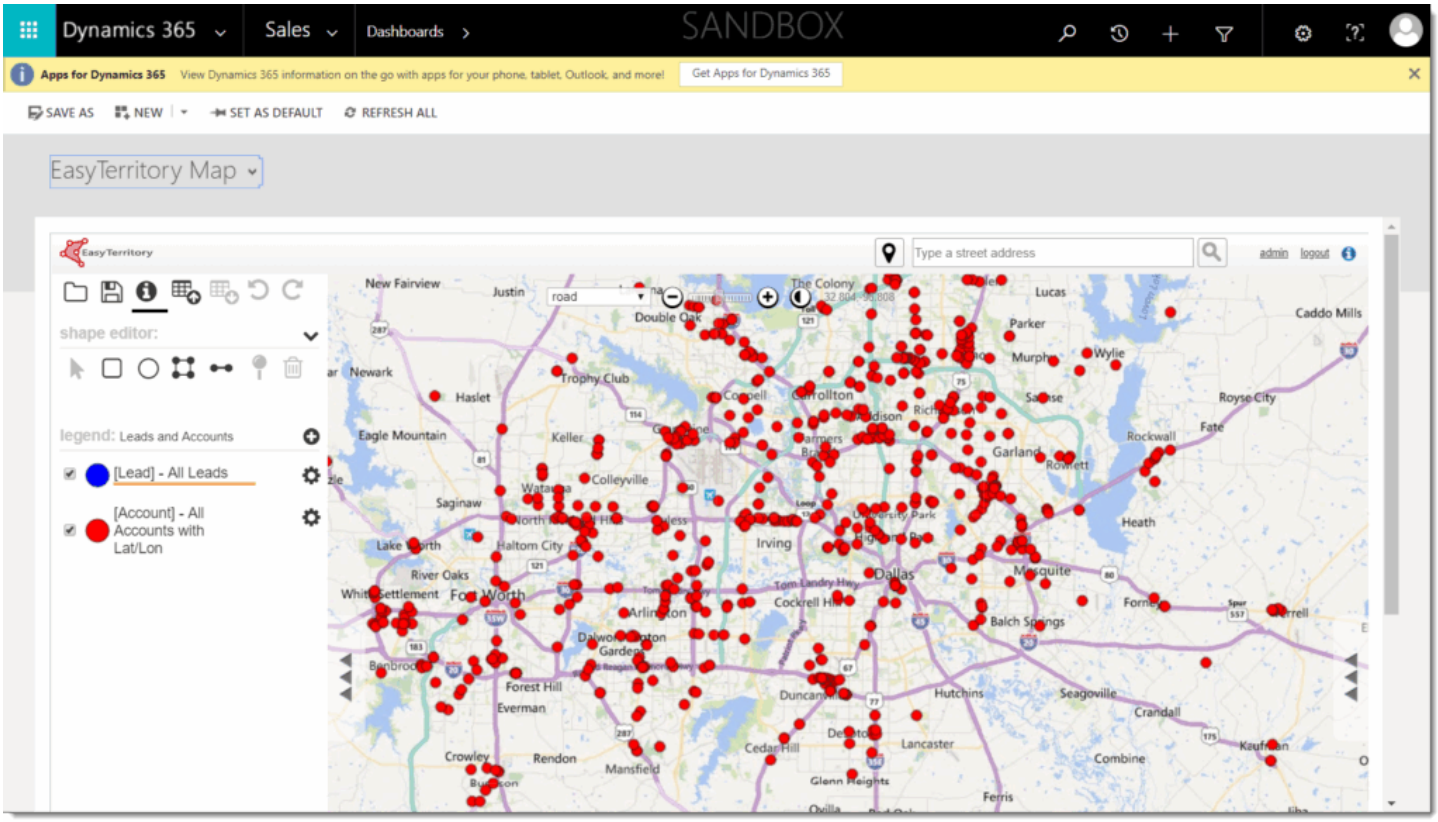
There are a number of ways EasyTerritory can help your business, and there are multiple methods for making its functions and features available within your organization. The following will provide an overview of the recommended launch points for EasyTerritory and how they can be offered in your EasyTerritory environment.

Launch Points within Microsoft Dynamics 365

Below are the common methods for accessing EasyTerritory which will typically originate in Microsoft Dynamics 365, and setup can be coordinated with EasyTerritory support staff.

iFrame within Dynamics 365

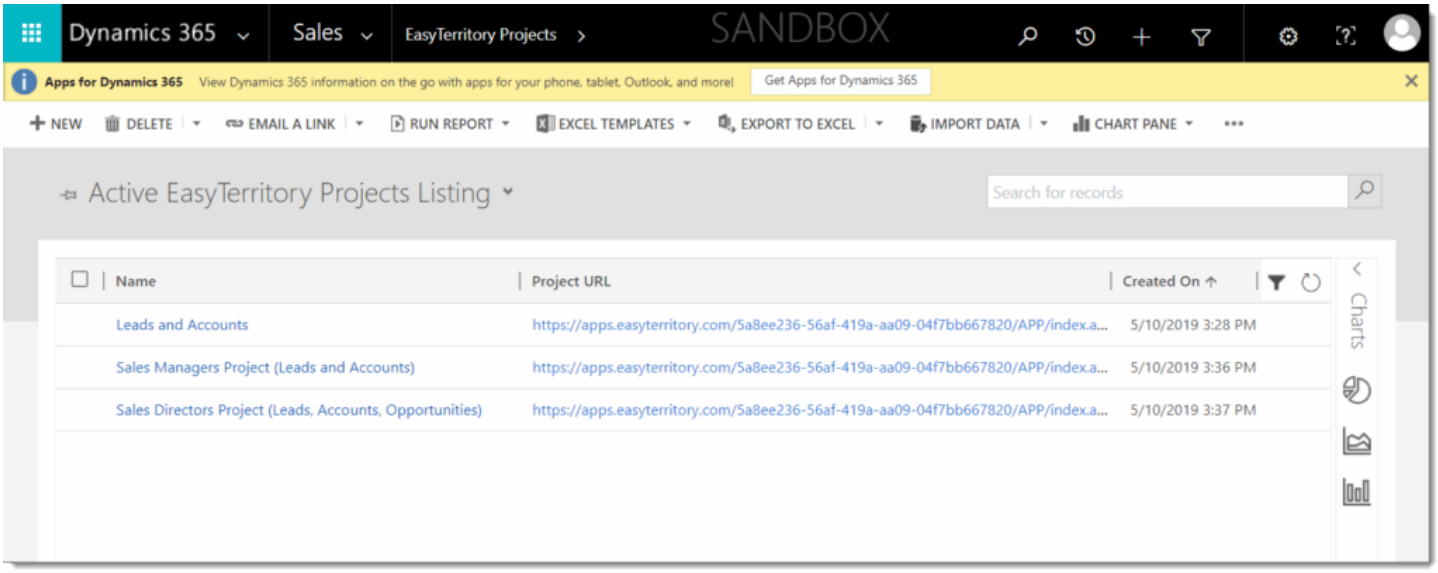
With a Dynamics 365 instance integrated with EasyTerritory, a mapping project can be created and saved containing data stored in Dynamics 365. The project URL can then be used as a web resource with an iFrame to embed the project within a dashboard in Dynamics 365. Anytime a user visits this dashboard they will be presented with the EasyTerritory project showing a current view of their Leads, Accounts, and Contacts, as well as how the business data is arranged in relation to their sales or service territories.



Use our instructions here to embed EasyTerritory in a Dynamics 365 IFrame.

EasyTerritory Projects Entity

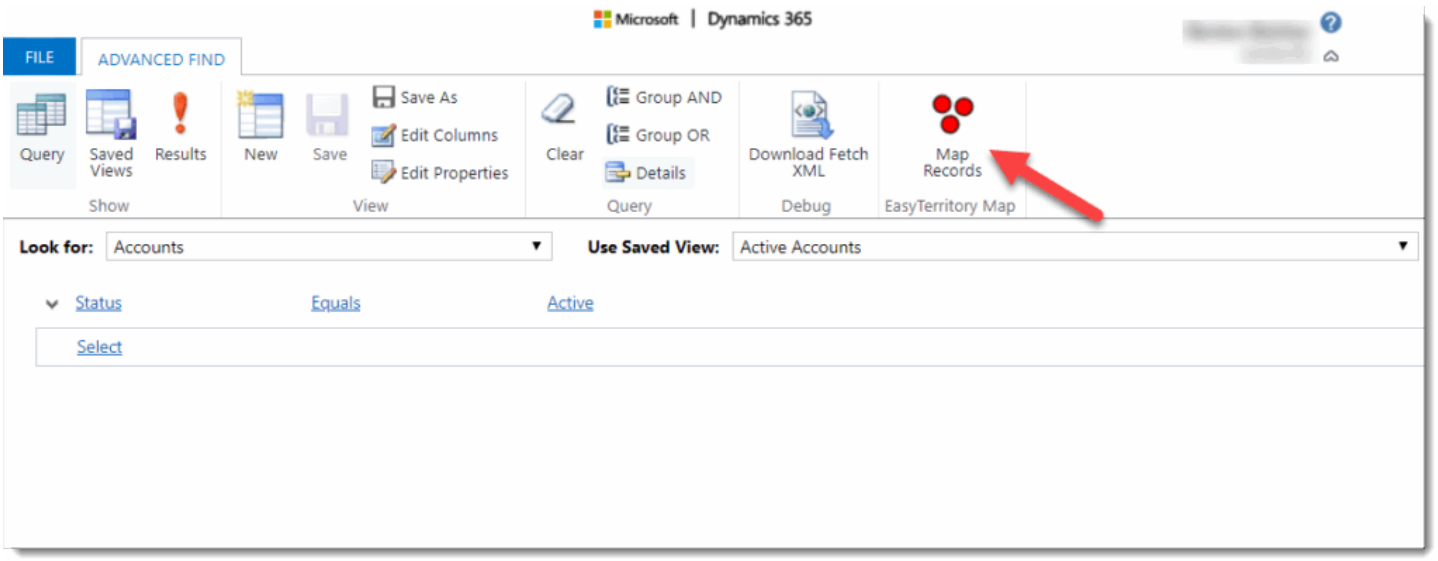
Another common method for providing access to EasyTerritory is to create an entity within Dynamics 365 to store links to the most commonly used projects in EasyTerritory. The EasyTerritory Projects entity can be made available on the Navigation Pane, and projects designed for directors, managers, and sales/service representatives can be listed here for their convenience.



When the project URL is launched the user will be brought into the map to view the current records relevant to their Dynamics 365 profile. The data in these projects can be driven by an Advanced Find view containing an “Owner=Current User” clause to focus the data on the authenticated user.

Advanced Find View

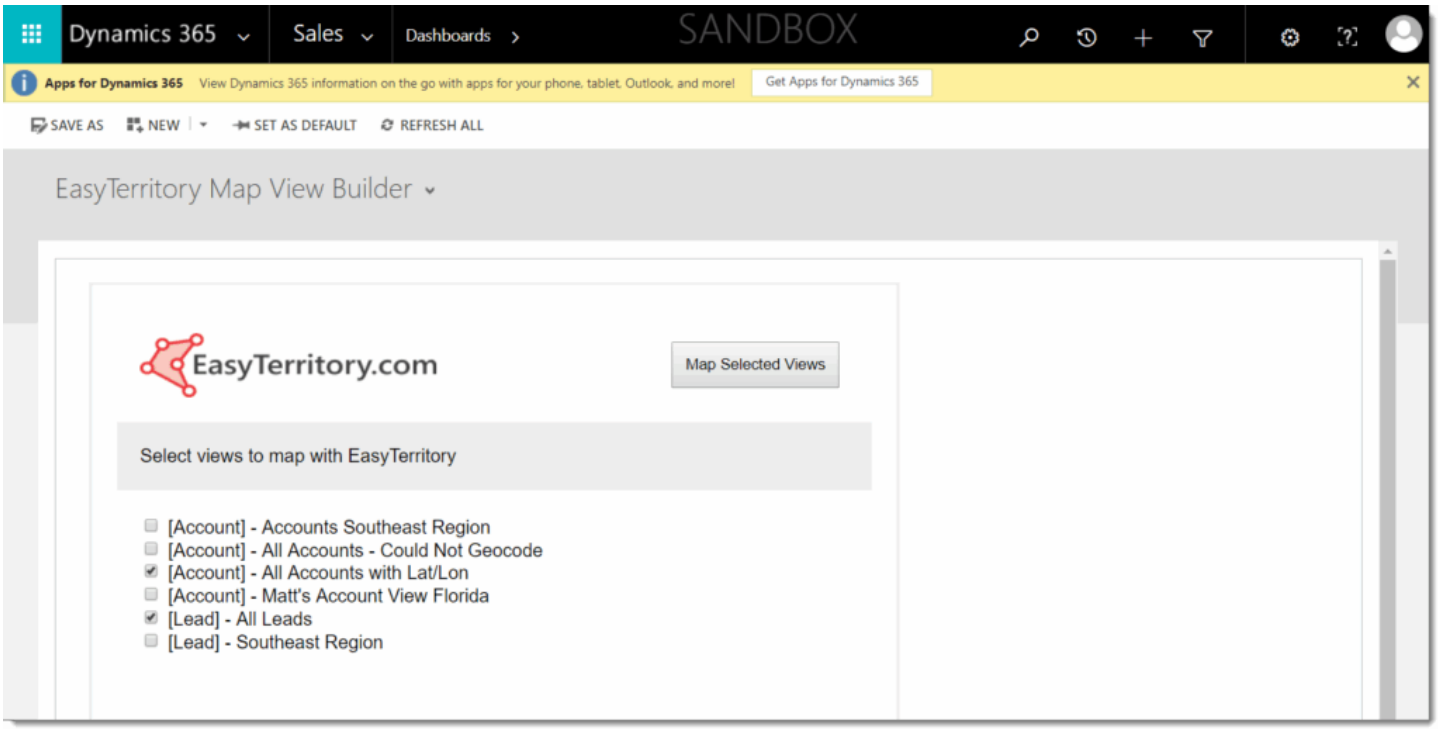
Users in Dynamics 365 can also launch an Advanced Find view to locate the precise records they seek and pull them into EasyTerritory using the Map Records button on the Advanced Find Ribbon Bar. This will create a placeholder project in EasyTerritory to store the data, and the project can be saved to retain the view within EasyTerritory. The next time the EasyTerritory project is launched it will fetch the most current records from Dynamics 365 according to the Advanced Find view parameters.



Use our instructions here to learn more about how the Advanced Find Map Records feature works.

EasyTerritory Map View Builder

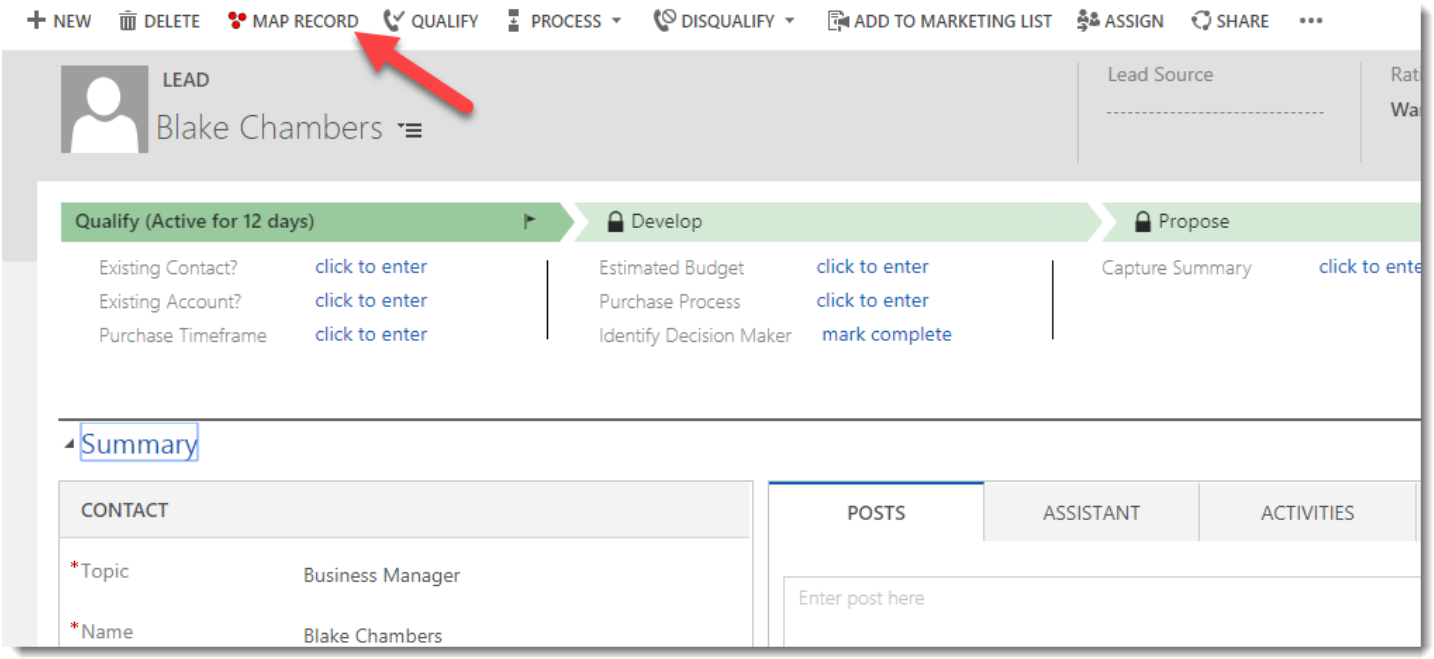
Users can also launch the EasyTerritory Map View Builder dashboard to see a list of all Advanced Find views containing the Latitude and Longitude columns. The check boxes can be used to map multiple views into the same EasyTerritory project. This approach is commonly used with the EasyTerritory Mobile View to give sales representatives a view of the Accounts they plan to visit along with any Leads or Opportunities that might be in their vicinity.



Use our instructions here to learn more about the EasyTerritory Map View Builder.

Map Record on Dynamics 365 Entity View/Form

The Map Record feature allows you to add an EasyTerritory button to the ribbon bar in your Dynamics entity view and/or record form. This button will open EasyTerritory in a new tab and zoom to the Latitude and Longitude of that specified record.



Use our instructions here to add the Map Record button to your entity view or form in Dynamics 365.

There are many ways to use EasyTerritory, and we are happy to work with you to determine the best methods to offer EasyTerritory within your organization.