



# **Atrio Map**

Version 8

## **Installation and User Guide**

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## Introduction

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This document is designed as an introductory guide for Microsoft Dynamics CRM users to learn how to install and configure Atrio Map. It includes step by step instructions, with screenshots.

Atrio Map allows users to visually view data on a map. It is a sales dashboard that offers users the functionality to create a driving route for their appointments for a specific date. Each entity is displayed with a different icon on the map and all views that are currently being displayed on the map are listed under "Views Displayed."

Features:

- Ability to see records with latitude and longitude data on a map
- Viewing entity records on a map
- Routing driving directions between home, work, and appointments
- Capability to load more than one view on map and views from different entities at the same time
- Displaying custom as well as system views
- Showing territorial alignment enabling customers to be added to a marketing list by circling them
- Allows you to reassign records by selecting a region
- Ease of scheduling appointments by simply selecting a pin

## Requirements/Compatibility

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The Atrio Common solution is required to be imported into CRM for Atrio Map to load. Atrio Map is compatible with CRM 2016.

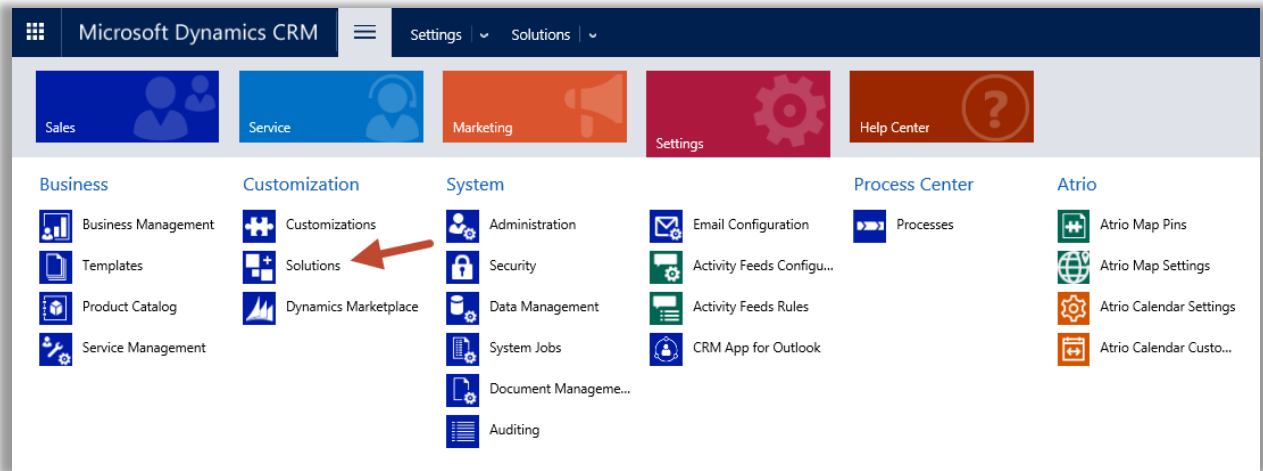
The following browsers are supported:

- Internet Explorer 10+
- Google Chrome 43+

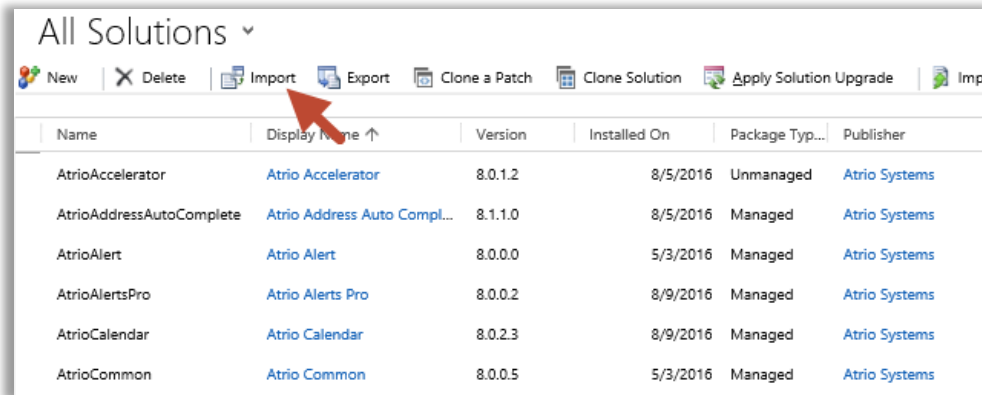
## Installation

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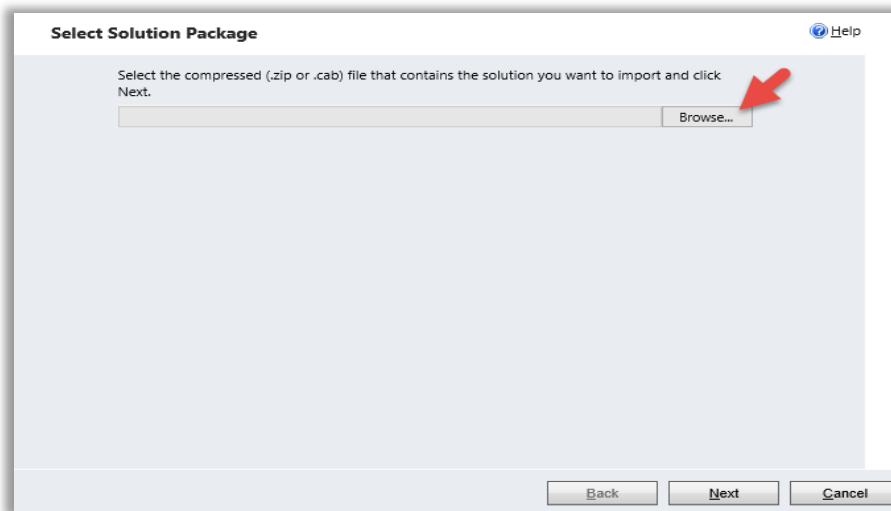
1. Navigation to **Settings->Solutions**.



2. Click **Import**.



3. Browse to the provided **Atrio Common** .zip file and import the solution.



4. Select **“Enable SDK message processing steps”** when walking through the wizard.

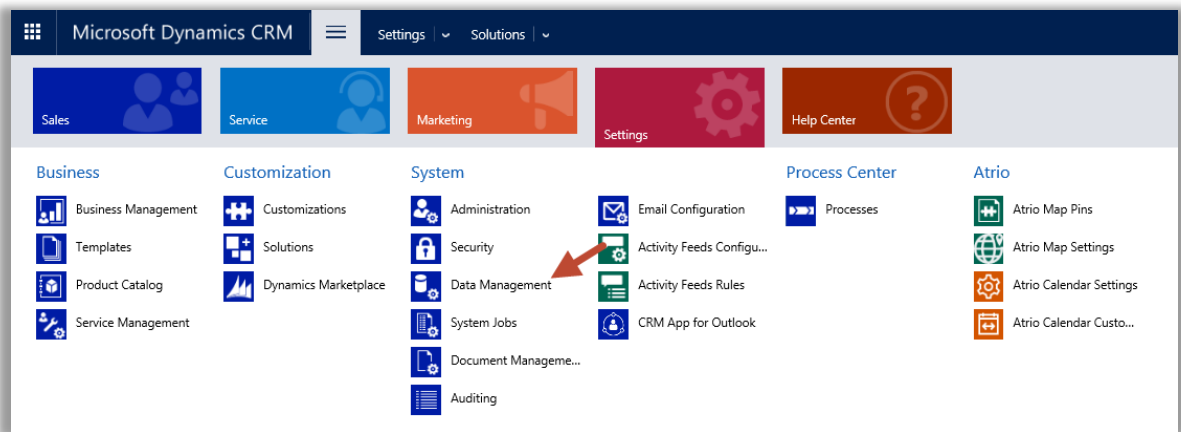
- Enable any SDK message processing steps included in the solution

**NOTE:** New business processes will be in the state that is defined by the solution provider. The state of processes that are already on the system won't be changed.

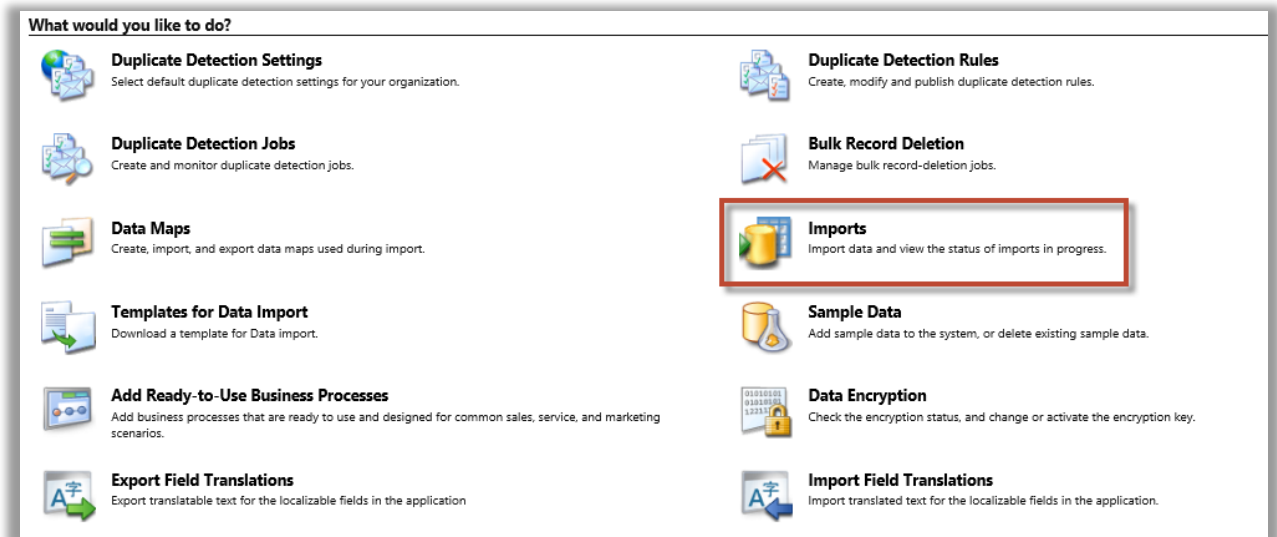
5. Finish following the import wizard by clicking **Import** and then **OK**.
6. Click **Import** again and browse to the **Atrio Map** zip file. Follow the above instructions once again for the Atrio Map solution.

## Importing Settings

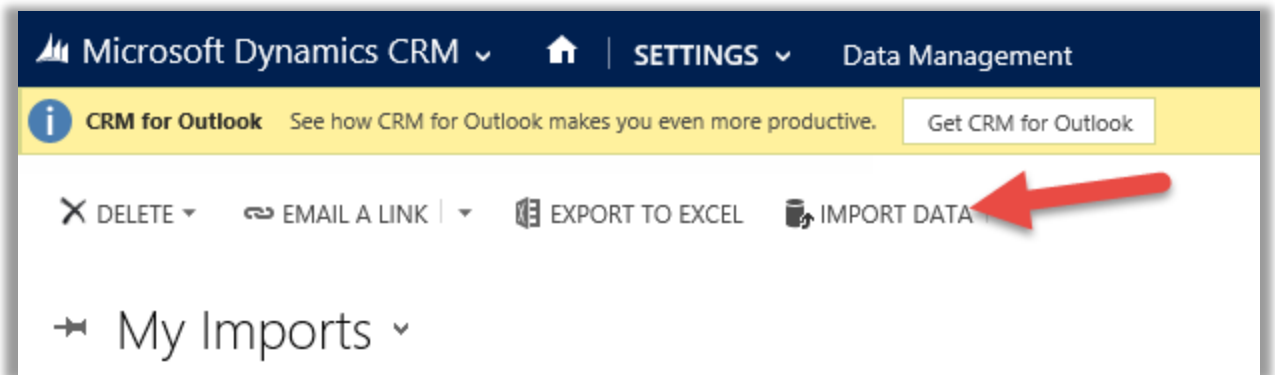
1. Navigate to **Settings -> Data Management**.



2. Click **Imports**.



3. Click on the **Import Data** button.

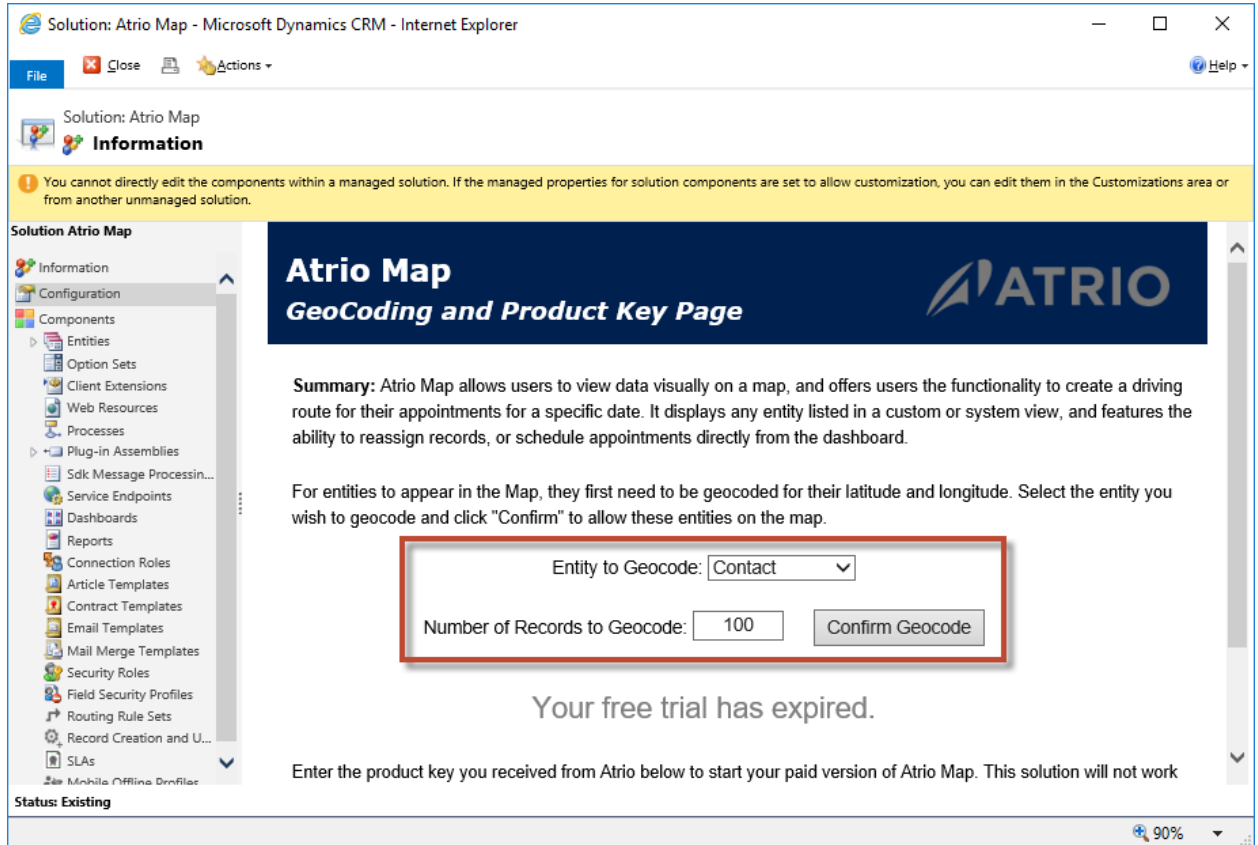


4. Browse to Atrio Map Default Settings zip file and import the file.

## Geocode Records

For records to appear on the map, they must be geocoded. This can be done through the configuration page.

1. Go to **Navigation->Settings->Solutions**.
2. Select the **Atrio Map** solution.
3. The configuration page will open. Choose the entity you wish to geocode and the number of records to geocode. **Note:** Google's maximum number of records it can geocode a day is 2,500.

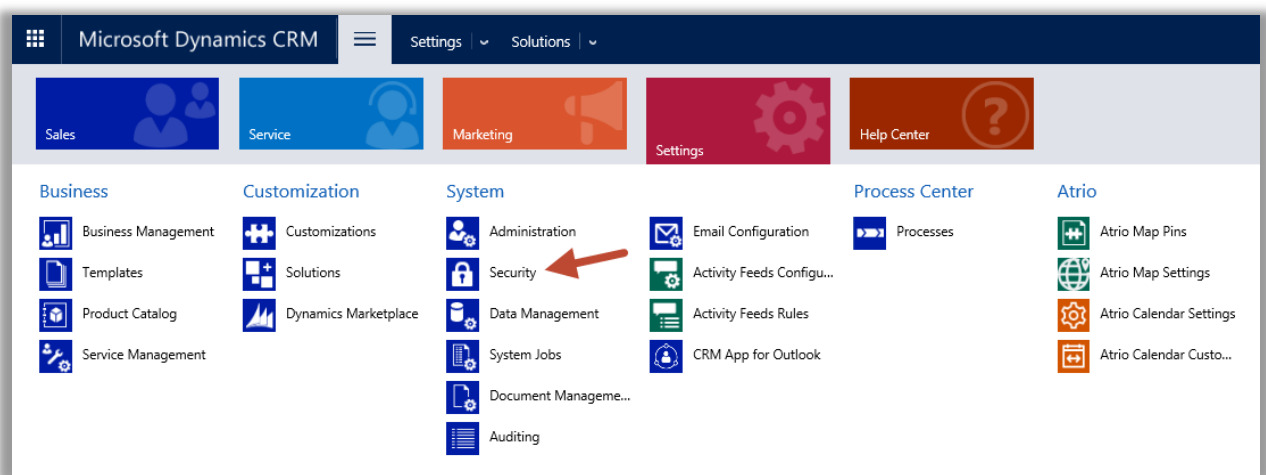


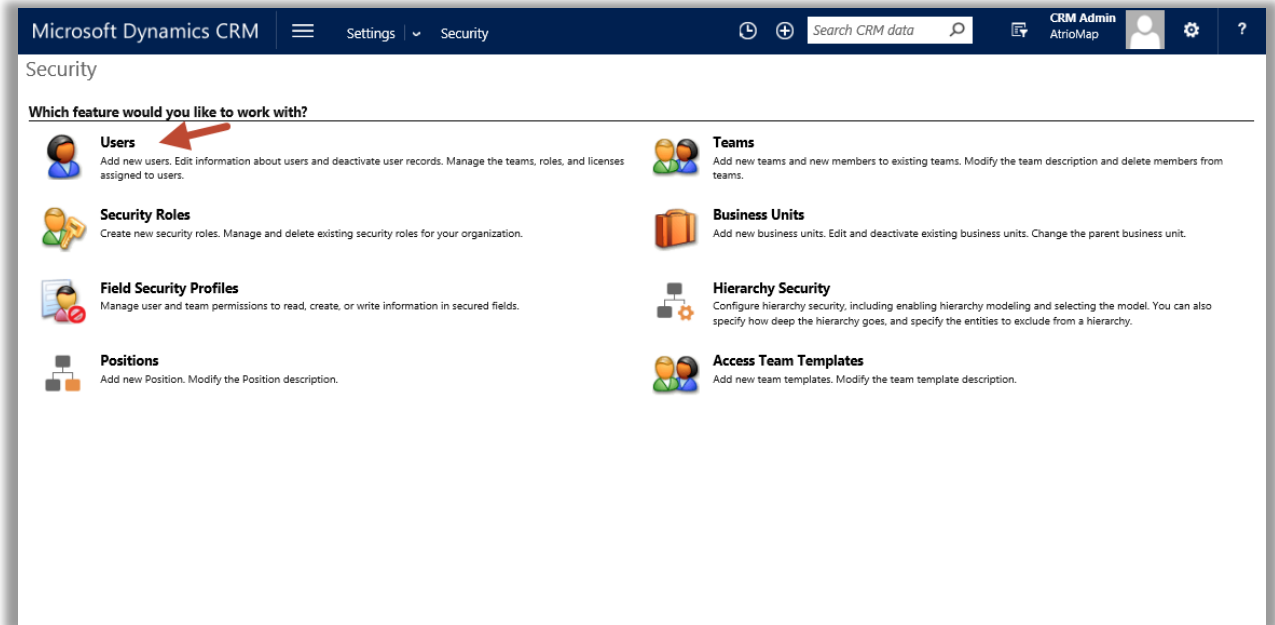
4. Select **Confirm Geocode** to start the geocoding process.

## Assign User Roles

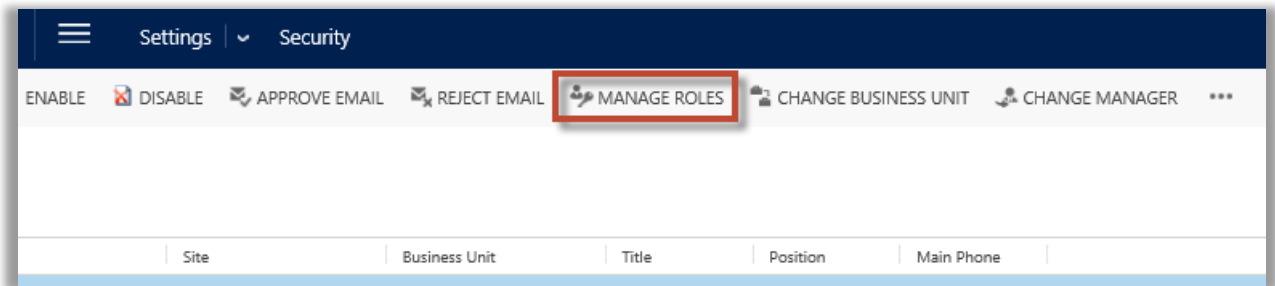
Anyone who needs to see Atrio Map needs the **Atrio Systems – Atrio Map** User role.

1. Navigate to **Settings->Security->Users**.



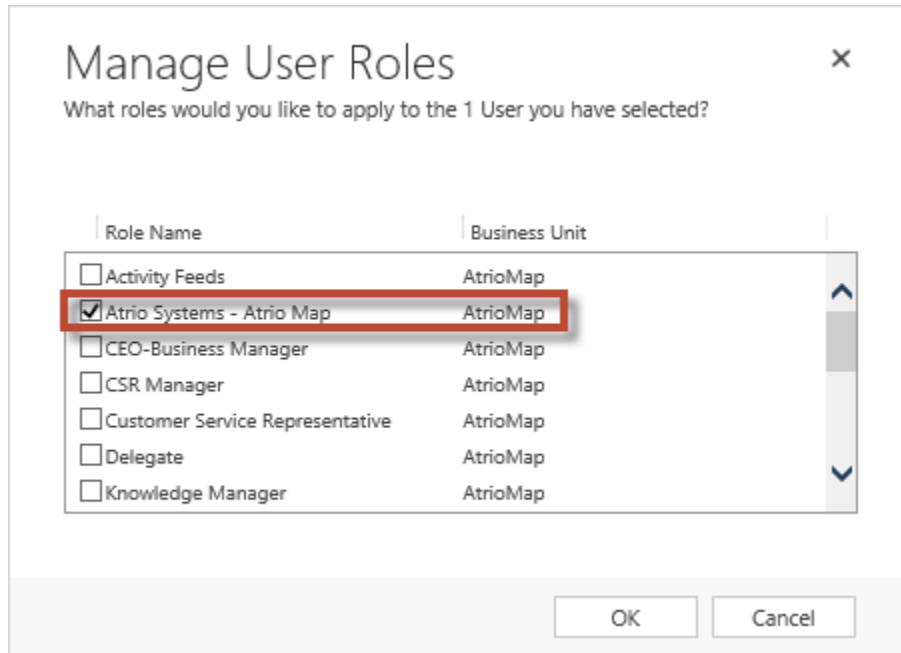


2. Select the users whom you wish to use Atrio Map.
3. Select **Manage Roles** in the ribbon.



4. Choose the **Atrio Systems – Atrio Map** role and select **OK**.





## Product Key

After 30 days of use, Atrio Map will no longer work. To enter a purchased product key, follow the steps below.

1. Navigate to the **Solutions** page again and open up the **Atrio Map** solution.
2. The **Configuration Page** will appear. Towards the bottom of the page will be a slot for the product key. Type in the product key you received from Atrio and click **Submit**. If you do not have a product key, contact Atrio at [support@atriosystems.com](mailto:support@atriosystems.com) to receive one.

### Your free trial has expired.

Enter the product key you received from Atrio below to start your paid version of Atrio Map. This solution will not work past the 30 day trial.

Product Key:

For product assistance or suggestions, contact [support@atriosystems.com](mailto:support@atriosystems.com).

## Support

Please send any product issues or suggestions to [support@atriosystems.com](mailto:support@atriosystems.com).

## Disclaimer

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