

INSTALLATION GUIDE VERSION 6.3 NOVEMBER 2022

Content

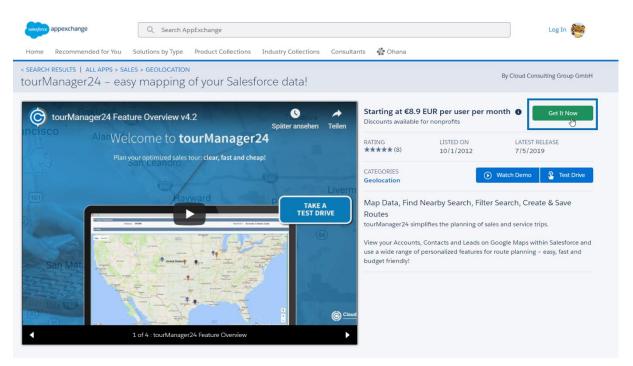
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1 INSTALLATION

To install tourManager24 open the <u>tourManager24 listing</u> on AppExchange.

Click on Get It Now.



If you are not logged in already, please log into the AppExchange and your Salesforce.com org with your Salesforce.com credentials.

Then you can choose whether you want to install *tourManager24* in your production (A) or sandbox org (B).

×
Where do you want to install this package?
Before you install in a production org, we suggest testing in a sandbox.
Install in a Production Environment Install where you or your users work, including developer orgs. Install in Production
Install in a Sandbox Test in a copy of a production org. Install in Sandbox
Cancel

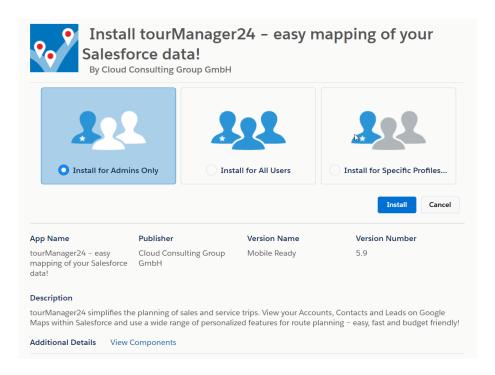
Then, read the terms and conditions and accept them via ticking the checkbox next to I have read and agree to the terms and conditions (A). Then click the Confirm and Install button (B).

hange	Q Search AppExchange		×
m	Confirm Installation I	Details	
S Username			•
Here are the det	ails we'll share from your profile	Edit Profile	
* First Name	Stephanie Com	Dany This field is required	
* Last Name	Grau *Cor	ntry This field is required	
* Job Title	This field is required State/Prov	ince	
* Email			
Phone			1
Salesforce.com Inc. is included in this review	* I have read and agree to the terms		
		ut other products or services I might like	Ŧ
		C B Confirm and Install	

Depending on your browser setting you will have to allow pop-ups from Salesforce to proceed to the next step. If you do not want to allow pop-ups from Salesforce you will have to click on the link in the notification.

The following pop-ups were blocke	ed on this page:
http://test.salesforce.com/?stat	rtURL=%2Fpack
 Always allow pop-ups from http appexchange.salesforce.com 	ps://
O Continue blocking pop-ups	
Manage pop-up blocking	Done

On the next screen please select for which profiles tourManager24 should be made available. You can decide whether to install the app for admins (Install for Admins Only), for all users in your org (Install for All Users) or for specific profiles (Install for Specific Profiles...). In case you have installed an earlier version of the app already it will say UPGRADE or if this is your first time it will say INSTALL *tourManager24*.



A pop-up will appear in which you have to grant access for the Google Maps API to your org. This is necessary as *tourManager24* uses this API for its geocoding and mapping services.

	Approve Third-Party Access	
tal	This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?	fic
	Website SSL Encrypted maps.googleapis.com	
ŀ		
	A Yes, grant access to these third-party web sites	
_	B Continue Cancel	hb

Tick the checkbox next to Yes, grant access to these third-party web sites (A). Then click Continue (B).

After that the installation process will start.

In some cases, it might take a while until *tourManager24* is installed and AppExchange informs you that you will receive an email when the installation has completed.

Install tourManager24 – easy mapping of your Salesforce data! By Cloud Consulting Group GmbH			pping of your
	aking a long time to insta e an email after the installation		Done
			G
App Name	Publisher	Version Name	Version Number
tourManager24 - easy mapping of your Salesforce data!	Cloud Consulting Group GmbH	Mobile Ready	5.9
Description			
			ts, Contacts and Leads on Google ning – easy, fast and budget friendly!

Click the Done button.

After you received the email you will find the *tourManager24* app within your "Installed Packages" in Salesforce Setup.

2 SETUP

Before getting started with the *tourManager24* app, please add the **buttons** to your **Page**and **Search Layouts**. You need the buttons to access the map.

2.1 Object Page Layout

Add the Show on Map button to your Account, Contact and Lead Page Layout(s).

Go to Setup \rightarrow Object Manager \rightarrow Accounts \rightarrow Page Layouts \rightarrow Select the Page Layout where you want to add the button to. On the Edit Page go to Mobile & Lightning Actions and type Show on Map.

SETUP > OBJECT MANAGER	
Details Fields & Relationships	Save * Oulock Save Preview As* Cancel Dundo @ Redol @ Layout Properties Petots Buttons Cational Laws State * Cation Laws
Page Layouts	Quick Actions Label Show On Map Mobile & Lightning Name FNB_EndNearby Actions Actions Units
Lightning Record Pages	Actions Expanded Lookups Palatert Litis
Buttons, Links, and Actions	Highlights Panel
Compact Layouts	Customize the highlights panel for this pare avout
Field Sets	Quick Actions in the Salesforce C assic Publisher 🔳
Object Limits	Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question
Record Types	Email
Related Lookup Filters	Salesforce Mobile and Lightning Experience Actions
Search Layouts	Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question Email Change Owner Include Offline Check for New Data Submit for Approval Get Contacts Edit Delete Change Record Type Sharing
Search Layouts for Salesforce Classic	View Account Hierarchy Call Send Text Email (mobile only) View Website

Please do the same for Contacts (Setup \rightarrow Customize \rightarrow Contacts \rightarrow Page Layouts) and Leads (Setup \rightarrow Customize \rightarrow Leads \rightarrow Page Layouts).

Repeat this step for all Page Layouts where you want to make the button available.

2.2 Object Search Layout

Add the Map button to the Search Layouts for Account, Contact, Lead, Opportunity and Case in order to make list views' multiple locations available to *tourManager24* and displayed on the map.

Go to Setup \Rightarrow Object Manager \Rightarrow Accounts \Rightarrow Search Layouts for Salesforce Classic. Click Edit next to "List View".

SETUP > OBJECT MANAGER					
Details	Search Layouts 5 Items, Sorted by Layout			Q Quick Fin	ıd
Fields & Relationships	LAYOUT	 COLUMNS DISPLAYED 	BUTTONS DISPLAYED		
Page Layouts	List View	N/A	New, Add to Call List, Printable View, Map Accounts		Ð
Lightning Record Pages Buttons, Links, and Actions	Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A		Edit
Compact Layouts	Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A		•
Field Sets	Search Filter Fields	N/A	N/A		•
Object Limits Record Types	Tab	Account Name, Billing City, Phone	N/A		•

On the "Edit Search Layout" page, select the Map Account button from the list of Available Buttons and add them to the Selected Buttons.

Standard Buttons
New [New]
Open in Quip [OpenListInQuip]
Clean [ListClean]
Get More Accounts [DataDotComGetAccountsMultiAddAction]
Discover Companies [DiscoveryGetAccountsAction]
Add to Call List [MassCreateCallList]
Printable View [PrintableListView]
Custom Buttons
Available Buttons Selected Buttons
Map Accounts
Add Up
Add
Remov. Down
•
List View Actions in Lightning Experience

Please do the same for Contacts, Leads, Opportunities and Cases.

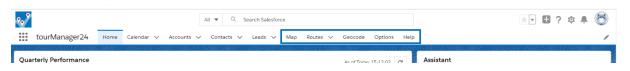
2.3 Tabs

The app will be delivered as managed package with the following tabs as default:

Home, Accounts, Contacts, Leads, Map, Routes, Geocode, Options, Help

You may choose to add the additional tabs to any of your existing apps. To integrate tourManager24 into one of your apps please add the following tabs:

Map, Routes, Geocode, Options, Help



For instructions to find the permission settings to make *tourManager24* available for your org's users see the <u>Admin Manual</u>.

3 GEOCODE YOUR DATA

The next steps can only be performed by a user with ADMIN permissions.

In order to depict your data on map, there must be geographical coordinates added to your Account, Contact and Lead records.

Within *tourManager24* you can choose to either geocode your data with tourManager24 Geocoding or use Standard Salesforce Geocoding using Data.com geocode Clean Rules.

Using tourManager24 Geocoding your data is geocoded using Google Maps API. Since tourManager24 4.2 release you can schedule this geocoding job.

We recommend using Standard Salesforce Geocoding if your org has more than 100,000 records (Accounts, Contacts and Leads) to be geocoded, as tourManager24 underlies Google Map restrictions allowing only 100,000 API calls a day.

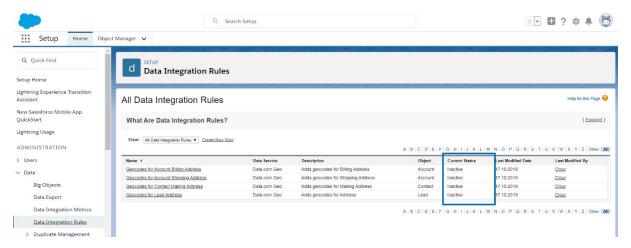
Our internal tests have shown some inaccuracies of the Standard Salesforce Geocoding feature resulting in several addresses which did not get proper geocodes.

3.1 Using Data Integration Rules

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.

3.1.1 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.



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.

Rule Details	Save	
Data Integration Rule Details		Required Information
Name Description Object	Geocodes for Account Billing Address Adds geocodes for Billing Address Account	
Data Service Data Integration Rule Settings Update all records (recommended)		
Vhen records are updated, do the followi Bypass triggers Bypass workflow rules Leave last-modified information u	g.	

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

Account Data Integration Rule Geocodes for Account B	Iling Address	Help for this Page 🥝
Rule Details	Edit Rule Settings Edit Field Mappin Contracts	
Description	Adds geocodes for Billing Address	
Object Data Service	Account Data com Geo	
Update all records (recommended)	Data.com Geo	
Bypass triggers	1	
Bypass workflow rules	1	
Leave last-modified information unchanged	✓	
Current Status	Inactive	
Created By	Automated Process, 06.05.2019 14:19	
Modified By	CCG Extern tourtdanager. 17.10.2019 15.27 Edit Rule Settings Edit Field Mapping Activate	

In the next step you need to activate the Rule.

Finally, please confirm to enable the Rule.

ling Address	
Activate Data Integration Rule	
You're about to activate the Geocodes for Account Billing integration rule.	Address data
Your data integration settings are configured to updat on your settings, data integration doesn't change the and time of a record.	
6.05 Iger, OK Cancel	
Edit Rule Settings Edit Field Mapping	

3.1.2 Monitor the Status

You can monitor the Status of your records by adding the related list "Data Integration Rules" to your Page Layout.

THE THE STREET AND A	1118-11(<i>1112</i>	SALET NIMOTAT TREAT		NRETHE THE SINGLES	XXXX//////////////////////////////////	
SETUP > OBJECT MANAGER						
Account						
						\sim
	Save V Quick Save Previ	ew As 🔻 Cancel 🛛 🔷 Undo 🛝 Redo 🛛 💼	Layout Properties			
Details	Quick Actions	Quick Find Related List Name	8			
Fields & Relationships	Mobile & Lightning Actions	Activity History Community Member	s Contracts Groups	Orders		
in a read of the second s	Expanded Lookups	Approval History Contact Roles	Data Integration Abo Notes & Attachments	Partners		
Page Layouts	Related Lists	Assets Contacts	Contracts Contracts	Related Content		
	Report Charts Components	Cases Content Deliveries	Geocoding tatus Opportunities			
Lightning Record Pages	Visualforce Pages					
Buttons, Links, and Actions			· · ·			
			Twitter			
Compact Layouts			1			
Field Sets	Related Lists					
Field Sets	. 04					
Object Limits	Contacts	New	Merge Contacts Add to Campaign			
	Contact Name	Title	Email		Phone	
Record Types	Sarah Sample	Sample Text	sarah.sample@company.com		1-415-555-1212	
Related Lookup Filters						
Related Lookup Filters	. 04					
Search Layouts	Opportunities	New				
	Opportunity Name		Stage	Amount	Close Date	
Search Layouts for	Sample Text		Sample Text	123,45€	17.10.2019	
Salesforce Classic						
Hierarchy Columns						
	Cases	New	Change Owner			

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.

More information on Data Integration Rules can be found on

- Documentation by Salesforce
- <u>Geocode Data Integration Rules</u>
- <u>Considerations for Setting Up Geocode Data Integration Rules</u>
- Full Guide Implement Data.com Clean (Winter '17)

3.1.3 Set up using Data Integration Rules in tourManager24

To set up Salesforce Geocoding in tourManager24, go to the Geocode tab and select Use standard Salesforce Geocoding Feature.

tourManager24	All Home Calendar Accounts Contact COCODE SETTING NOTIFICATION	Q Search Salesforce s ∨ Leads ∨ Map Routes ∨ Geocode	
Type of Geocoding	Standard Salesforce Geocoding		×
For Mapping Accounts	Billing		
Minimum Geocoding Accuracy	Country	Edit Geocoding Setting	
	Edit	Type of Geocoding Use standard Salesforce Geocoding Feature For Mapping Accounts	\$
		Use Billing Address	\$
		Minimum Geocoding Accuracy	· · ·
		Country	\$
		Cano	el Save

When you click "Edit" 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 the "Save" button on top of the page.

3.1.4 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.

	:
Edit Geocoding Setting	
Type of Geocoding	
Use standard Salesforce Geocoding Feature	•
For Mapping Accounts	
Use Billing Address	÷
Minimum Geocoding Accuracy	
Country	* *
Address	
NearAddress	
Block	
Street	
ExtendedZip	
Zip Neighborhood	
City	
Country	
State	
Unknown	

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.

3.2 Set up tourManager24 Geocoding

Per default, the Standard Salesforce Geocoding is set up. But the tourManager24 geocoding can be chosen upon first installation of the app and any time after under the Geocode App in Geocode Setting.

tourManage	er24 Home Calendar ∨ Accounts ∨ Contacts ∨ L	eads 🗸	Campaigns 🗸	Map	Routes 🗸	Geocode	Opti
GEOCODE STATUS	GEOCODE SETTING NOTIFICATION						
		_					
Type of Geocoding	tourManager24: Geocode Job						
For Mapping Accounts	Billing	Γ					
Objects To Geocode	Account,Contact,Lead						
Frequency	Daily						
Weekday(s)							
Time	12:00 PM						
Next Fire Date	18.3.2020						
Last Fire Date	17.3.2020						
Status	Waiting						
	Edit						

If you choose tourManager24 geocoding, you must enter your own API Key in one additional field.

	×
Edit Geocoding Setting	
Type of Geocoding	
Use tourManager24 Geocoding Feature	\$
API Key	
1	
For Mapping Accounts	
Use Billing Address	\$
Objects to be geocoded	
Account Contact Cead	
Daily	
Time	•
12:00	
	Cancel Save

The credentials can be requested from Google. Please read through our <u>Admin Guide</u> detailed information how to do this.

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.

2	All 🔻 🔍 S	earch Salesforce		*• 🖬 ? 🌣 🐥 🌔
tourManager24 Home Calendar V Acc	ounts 🗸 Contacts 🗸	Leads V Map Routes V Geocod	e Options Help	
EOCODE STATUS GEOCODE SETTING NOTIF	TCATION			
		Start Geocoding		
eocode (tourManager24 Geocoding)				
OBJECT NAME SUCCESSFULLY GEOCOD	DED	INCOMPLETE ADDRESS	NEED GEOCODING	CAN'T BE GEOCODED
Account 0		0	794	0
Contact 0		0	248	0
Lead 0		0	174	0

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

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.

3.2.1 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

GEOCODE STATUS	GEOCODE SETTING	NOTIFICATION
Type of Geocoding	tourManager24: Geocode Job	
For Mapping Accounts	Billing	
Frequency	Daily	
Weekday(s)		
Time	12:00 PM	
Next Fire Date	18.10.2019	
Last Fire Date	17.10.2019	
Status	Waiting	

Ν

Edit

14

geocoding process was performed, when it will be performed next and whether it is in progress or waiting for the next time to run.

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 daily, on weekly or on monthly basis. To schedule tourManager24 geocoding on 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.

Type of Ge	ocoding							
Use tour	Manager	24 Geoco	ding Feat	ure				
API Key								
For Mappi	ng Accoun	ts						
Use Billi	ng Addres	s						
Objects to	be geocod	ded						
		Contact	 Lea 	d				
Frequency								
Weekly								
Weekday(5)					_		
Mon	Tue	Wed	Thu	Fri	Sat	Sun		

Then click the Save.

	×
Edit Geocoding Sett	ing
Type of Geocoding	
Use tourManager24 Geocoding Feature	\$
API Key	
and the second second	
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.

	×
Edit Geocoding Setti	ng
Type of Geocoding	
Use tourManager24 Geocoding Feature	\$
API Key	
For Mapping Accounts	
Use Billing Address	\$
Objects to be geocoded	
Account Contact Cead Frequency	
Monthly	
Time	•
12:00	
	Cancel

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.

3.2.2 Monitor your Geocode result

Email

After your records are geocoded you will be informed via email that the process has been completed. This email also contains a link to your Salesforce geocode page.

Additionally, you'll get an email if there occurred errors while the geocoding process because of required fields or active Validation Rules. The email contains a link to a report where you can get detailed information about the geocoding errors.

Geocode Status

On the **Geocode** tab you can always see an overview (see screenshot above) of the geocoding status of your Accounts, Contacts and Leads. This status is automatically updated if new records are created in your org.

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".

~ ?		All 🔻 Q	Search Salesforce		*	- 🖬 ? 🌣 🖡 🐻
tourManag	g er24 Home Calendar ∨	Accounts 🗸 Contacts 🗸	Leads 🗸 Map	Routes 🗸 Geocode Options	Help Reports V X	1
Reports All Folders > to 6 items	burManager24	CALL STAND		Q. Search all folders	New Report New Report (Salesforce Classic)	New Folder 💌 🕸 🗸
REPORTS	Name 🗸	Description V	Folder	✓ Created By	✓ Created On ✓ Subscribe	d
Recent	Account Geocode Issue Report	This report contains all Account	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	
Created by Me	Contact Geocode Error Report	Shows reason why geocoding fa	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	
,	Account Geocode Error Report	Shows reason why geocoding fa	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	
Private Reports	Lead Geocode Error Report	Shows reason why geocoding fa	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	
Public Reports	Lead Geocode Issue Report	This report contains all Leads re	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	
All Reports	Contact Geocode Issue Report	This report contains all Contact	tourManager24	CCG Extern tourManager	16.10.2019, 11:07	•

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.

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:

Admin Guide

For further information about the installation process including how to set up Clean Rules and Geocoding, please read the <u>tourManager24 Admin Guide</u>.

User Manual

For more detailed information about the tourManager24 app functionalities please read the <u>tourManager24 User Manual</u>.

Support

Please feel free to contact us <u>online</u> for further support, open questions and feedback.

About Us

Cloud Consulting Group – Your partner for Cloud IT!

We live and breathe Salesforce.com. 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.com and others we are excited to take you on this journey.

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