Administration Guide

Contents

Managing Mapadore Application Settings

This document describes how to install and configure Mapadore for Salesforce.
The following paragraphs are:

- General
- Settings
- Filters
- Rules

General

Application Settings: This value field is managed by Mapadore and it depends on the type of license that you have purchased.
Enable Statistics: Allows Salesforce Admins to choose whether to Enable Statistics inside Mapadore.

Settings

This section allows to set a number of specific functions and permissions that affect the users' experience, i.e. what the users can see in the user interface and what they can do.

There are three levels of application scope:

Organizational Settings affects all users in a specific Salesforce Organization.
Profile Settings affects a specific salesforce profile like "call center rep" or "sales manager" which you manage with Salesforce.
User Settings affects specific individuals who make use of the software, i.e. Jane Smith instead of "Sales Rep".

The following options are available for each scope:

Agenda Timetable Settings
- *Workdays:* Working days
- *Daily Start Time:* When does your working day start
- *Daily End Time:* When does your working day end

Smart Appointment Settings
- *Days Range:* Time span to consider for possible geo optimized appointments
- *Appointment Duration:* Average default sales appointment duration
- *Appointment Item Count:* Default number of appointments displayed
- *Time Zone Info for Appointment:* Timezone details shown on the appointment

proposal page

- *Edit Taken Appointment:* Enable editing of a taken appointment
- *Auto Edit Taken Appointment:* Allow appointments to open automatically in edit mode
- *Owner Priority for Appointment:* Allow the record owner to be the default user
- *On-Site Appointment:* Allows to set the address for the appointment as a specific default location instead of considering the account's address
- *Time Range Info for Appointment:* Shows the free time range available for new appointments.
- *All Slot for Range Availability:* Shows the nearest available appointment option without considering any existing constraints.
- Minimum Rating: 1 to 3 stars rating.
- *Cost per Hour:* The Sales Rep's labor cost per hour
- *Cost per Km:* The sales rep's car use cost per Km
- *Default fitness Skill (0.00-1.00):* Default value for the user's Fitness skill
- *Event Subject Template:* Event subject creation rule
- *Default Slack Time:* Slack time in-between appointments
- *Show Custom Filter Picker:* Option to show filters about customers
- *Component View Options:*
- *Map View Options:*
- *Appointment Check-Out Options: geolocation and/or appointment feedback.*

Smart Nearby Settings
- *Enable Slot:* Option allowing to add the 'nearby' slots in the Geo-Optimized Slots component. This is useful in particular for call centres scheduling appointments through call-lists.
- *Distance Range (mts.):* Distance from the Sales Rep's position used by the Smart Nearby tool to select the account in that distance range
- Item Count: Default number of clients displayed
- *Owned Only:* Only shows records owned by the user
- *Account Type Filter:* Allows to filter the accounts by type
- *Account Type Filter Percentage (0-100):* Filtered Account type percentage compared to the total Account number.
- *Default Filter:* Default targets, filtered according to specific criteria
- *Concatenate default filter with AND:* Subsequent default filters (appointment/call) with AND *instead of OR*
- Recent Appointment Day Limit: Default number of days set as time span filter for recent appointment evaluation
- *Recent Call Day Limit:* Default number of days set as time span filter for recent call evaluation
- *Show Appt/Call Filter Picker:* Allows to see the filters regarding customers with already taken appointments/calls
- *Custom Filter: custom filter choices available to specify.*

Next Best Customer Settings
- *Target Address:* Leaving address towards the next best customers
- *Nearby Distance Range (mts.):* A certain distance from the sales Rep's position used by Smart nearby to select the account in that distance range

- *Item Count:* Default number of suggested accounts to be displayed
- *Owned Only:* Allows only to show those records that are managed by the operator
- *Account Type Filter:* Account filtering by their type
- *Account Type Filter Percentage (0-100):* Filtered Account type percentage compared to the total Account number.
- *Lead Percentage (0-100):* Leads percentage in relation to the total account number
- *Default Filter:* Default Filter targets among existing ones
- *Concatenate default filter with AND:* Subsequent default filters (appointment/call) with AND *instead of OR*
- *Recent Appointment Day Limit:* Default number of days set as time span filter for recent appointment evaluation
- *Recent Call Day Limit:* Default number of days set as time span filter for recent call evaluation
- *Show Appt/Call Filter Picker:* Allows to see the filters regarding customers with already taken appointments/calls
- Custom Filter: custom filter choices available to specify.

Smart Team Settings
- *On Behalf:* Indicates who will actually attend the sales appointment taken by the user (who can be a different person)
- *Smart Fit Teammate:* Shows the soonest optimized appointments with team members from a designated Smart Team Group
- *Smart Team Group:* Name of a group of users
- *Include All Interaction: Allows to in*clude appointments and calls that haven't been assigned to any Sales Rep when Smart Nearby displays customers and Smart Appointments displays already scheduled appointments.
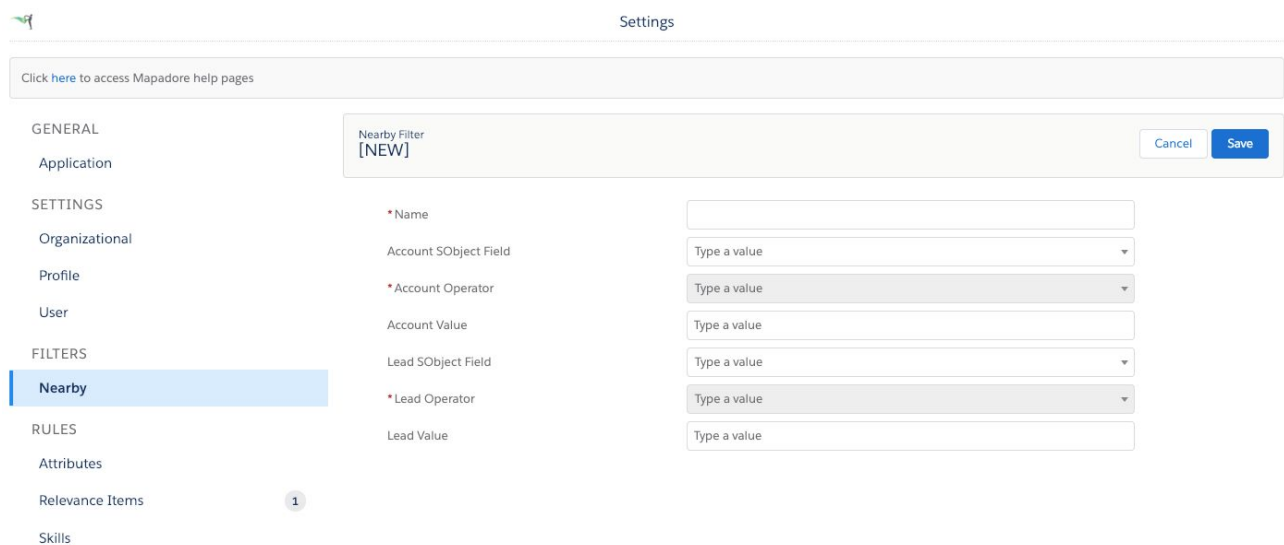
Operation Relevance Item
- *Opportunity as Relevance Item:* The account opportunity will be used as a relevance item.
- *Opportunity as RI Item Name Mapping:* Opportunity field name to map the relevance item name attribute.
- *Opportunity Product as Relevance Item:* The product opportunity will be used as a relevance item.
- *Event Extended Search:* Besides accounts, contacts and leads events can be assigned to other record. If they reference back to the formers you can tell the service to consider them by using the following syntax [["CustomObject__c",["Account__c","Lead__c"],"DateLimiter__c"]]

Other Settings:
- *Account Address Field:* Choose if you want to use 'Billing Address' or 'Shipping Address' as default address.
- Contact Address Field: the contact field name used for address calculations.
- Lead Address Field: the lead field name used for address calculations.
- *Enabled Debug: allows in-depth analysis in case problems occur.*

Filters

In this section we can define the specific data filters to isolate a certain category of Accounts or Leads.

Choose a smart name to identify the filter and set the filter criteria to either Account or Lead.
Filters don't work in AND but in UNION, you can insert it for Account instead of Lead or for both.

Rules

Mapadore for Salesforce gives the users the possibility to prioritize customers through the calculation of a Relevance Score and to set bidirectional matching policies between the customers and Sales Reps.

This may be implemented in different ways depending on the different contexts that Mapadore can fit in.

The best matching between customers and Sales Reps is made possible by 3 elements: Relevance Item, Attribute and Skill, which are defined within Salesforce as Custom Objects. These allow the priority criteria to focus on certain customers rather than others. The Relevance Score for a client can be obtained by blending these three elements together.

Attributes

Attributes can increase or decrease the customer priority status within the Digital Assistants areas.

They indicate physiological/social features or any other connotations that are believed to affect the sales phase. Some examples of Attributes are age, gender, geographical area or educational qualification.
They can be assigned dynamically by creating a rule based on the fulfilment of any condition, which can be set in an Account/Lead/Contact object field.
You must customize Attributes to match Relevance Items assigned either to an Account or a Lead.

Relevance Items

Relevance Score can increase or decrease the priority assigned to customers within the Digital Assistants areas.

It consists of two elements, the economic value in currency and the success probability of the deal. The multiplication between the economic value and its probability of closure produces the revenue value; customers with a higher revenue value are positioned at a higher level in terms of opportunity, while lower or unreported revenue values bring customers to the lower end of the table because they indicate lower sales potential.

The Relevance Score can be affected:
1. automatically, by selecting the option "Opportunity as Relevance Item" from within the admin console

By selecting this option, a relevance score value will be assigned to all customers. Such function takes into consideration the weighted value of open opportunities associated to that customer.

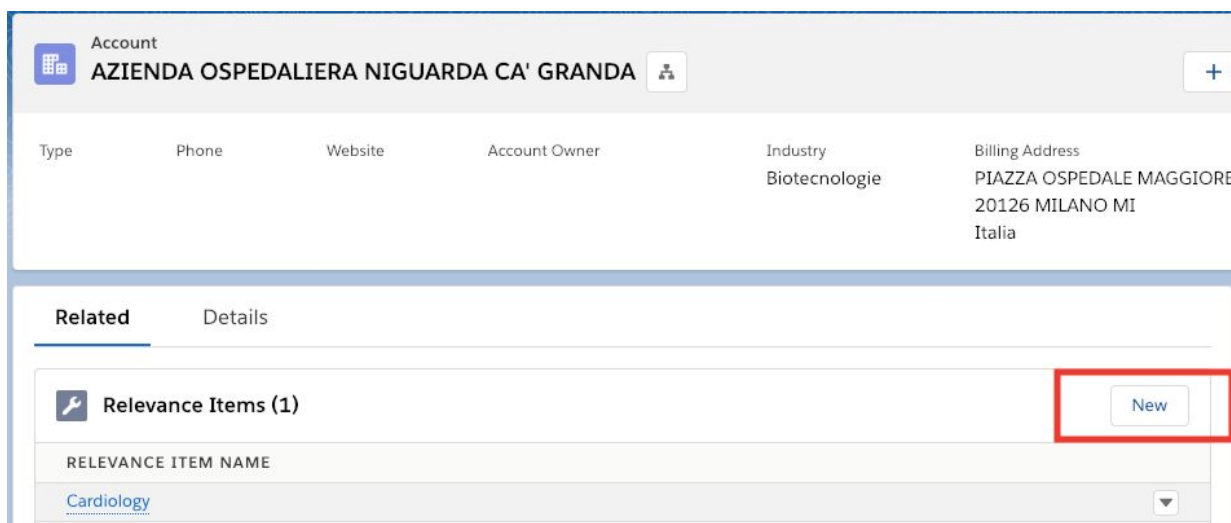2. semi-automatically by setting global or dynamic rules from within the admin console

By selecting a global rule you can assign a relevance score value and probability to all customers.

By selecting a dynamic rule you can assign a relevance score value and probability, based on a rule checking a condition on any standard or custom field of SF object (Account/Contact/Lead)

3. manually, by associating relevance items to each customer

You can assign a relevance score value and probability only to specific customers.

Skills

Skills indicate the Rep's selling capabilities when it comes to specific products or otherwise when the client has particular features and characteristics.

Each skill is identified by a name and a probability that is called "Fitness".

A seller who is more skilled at selling cosmetics rather than hair products will have a 0.8 fitness rate on the "Cosmetics" skill scale and a 0.3 fitness rate on the "Hair Products" skill scale.

Skills can be associated to every SF user to further increase (or decrease) the relevance score of customers shown into the Digital Assistants.

You must customize skills to match to either Relevance Items assigned to an Account, Opportunity, or Lead. You can also match skills to Attributes.

Skills can be created:

1. semi-automatically by setting global or dynamic rules in the admin console

By selecting a global rule you can assign a skill name and fitness to all users.
By selecting a dynamic rule you can assign a Skill and a related Fitness rate for a type of User on the basis of a specific rule, checking a standard or a customised condition field.

2. manually, by associating skills items to each user

New Skill

Information

* Skill Name

Owner

User

👤 Michael Hold ✕

Fitness

Cancel   Save & New   Save

Time Availabilities

Customer

Allows to add each clients' weekly availabilities, in terms of days and time slots.
By selecting Related - Time Availabilities in the Account's page, you can pick and add one or more week days and select Start Time and End Time from the menu. Time slots can be customised in relation to specific days of the week.

Account
Amusements Axis 🛎

Type	Phone	Website	Account Owner	Account Site	Industry
			🛎 Tye Reynolds 👤		

Related   Details

📷 **Time Availabilities (0)**   New

New Time Availability

Information

Owner	Michael Hold
Time Availability *Name	Morning
Location	

*Days of the Week

Available
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Chosen
- Monday
- Tuesday

*Start Time	9.00
*End Time	13.00

Cancel   Save & New   Save

User

Allows to add weekly availabilities and position for Sales Reps.

Open the Rep's account page. By selecting Related - Time Availabilities in the Rep's profile page, you can pick and add one or more week days and select Start Time and End Time from the menu. Time slots can be customised in relation to specific days of the week.

New Time Availability

Information	
Owner	Michael Hold
Time Availability *Name	Morning
Location	

* Days of the Week

Available
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

Chosen
- Monday
- Tuesday

* Start Time	9.00
* End Time	13.00

Cancel   Save & New   Save

This is the general time availability but sales reps often need to set a time availability that is valid only for a specific period or day.

New Time Availability

Select a record type

○ Date
    Applies to a specific calendar date with the highest priority

○ Date Range
    Applies to a date range, all days of the week or some, with high priority

○ Days of the Week
    Applies to one or more days of the week with low priority

Cancel   Next

You can choose among three different types of Time Availability.
Date : refers to a specific day
Date range: refers to a specific period (e.g month, week, etc)
Days of the week: no preference set

mapadore

Date Range:

You need to fill in the start date and the end date in order to specify the period; Finally you should fill in the start time and end time in order to set your availability for that period.

New Time Availability: Date Range

Information

*Time Availability Name	Location

Days of the Week

Category

--None-- ▼

Available		Chosen
Monday	▶	
Tuesday		
Wednesday	◀	
Thursday		
Friday		
Saturday		
Sunday		

*Start Date

Date:

First of all, you should fill in the date and then the start time and the end time. This will allow you to define your availability for that specific day.

New Time Availability: Date

Information

*Time Availability Name	Location

*Date	Category
🗓	--None-- ▼

*Start Time

🕐

*End Time

🕐

Create out-of-office events ⓘ

☐

Documentation Reference

Table 1: Useful Salesforce.com Help Links:

Configuration Item	Link in Salesforce.com Help
Layout Optimization	https://help.salesforce.com/articleView?id=customize_layout.htm&type=0
Adding Custom Fields	https://help.salesforce.com/articleView?id=000229314&type=1&language=en_US
Adding Custom Objects	https://developer.salesforce.com/docs/atlas.en-us.206.0.apexcode.meta/apexcode/apex_qs_customobject.htm
Adding Quick Actions	https://help.salesforce.com/articleView?id=custom_actions_overview.htm&type=0&language=en_US&release=208.6