

MAP PLOTTER

USER GUIDE v1.36

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Overview

Map Plotter is a geocoding app, which helps to visualize the Salesforce data on the map. With this app, businesses can see where their objects are in relation to their physical location. It helps in planning the daily route, filtering the data based on business requirements and plotting the results on the map, filtering the map points, and many such things.

- This document is a detailed user guide for Map Plotter
- This user guide includes topics such as installing the application, setting up the required keys, mapping an object, geocoding an object, and plotting the required objects
- It gives information about accessing Salesforce from the app, filtering Data Points, plotting them on the map, and getting directions between more than two mapped Data Points

Need of Map Plotter

- Map Plotter helps you to view sales data and plot it on a map
- It provides the concentration of sales data in a region and allows you to apply filter criteria as per your need
- You can search, select an object(s) that you want to view, find sales data within a selected area, get directions between mapped points.

System Requirement

To start harnessing the power of Map Plotter, you just need to have the Map Plotter app installed in your system and have your Org ready to use.

- For more details on browser and device requirements please refer to [Device and Browser Requirements for Map Plotter](#)
- To install the Map Plotter app please refer document Installing Map Plotter from [here](#)

See Also

- [Uninstalling Map Plotter](#)
- [Troubleshooting](#)

Accessing Map Plotter

You can use the Map Plotter app both with Salesforce lightning and Salesforce classic.

- The look and feel of the app are the same in both cases
- The only difference is the way you access it

Accessing via Salesforce Lightning

To access Map Plotter when you are using Salesforce Lightning:

https://login.salesforce.com

salesforce

Username 2 Saved Usernames

Password

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

Step 1: Go to your “Salesforce Org”, Enter the “credentials”, and Click “Log In”.

Map Plotter

Search...

Map Plotter Setup Help

Home Map Plotter Settings Map Plotter

Quick Find / Search...

Expand All | Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories

Getting Started

Build App

Generate a basic app with just one step, and then easily extend that app with clicks or code.

Add App

Learn More

- Next Steps
- Force.com Workbook
- Force.com Fundamentals
- Download SalesforceA, the mobile app for admins: iOS | Android

Recent Items beta

Name	Type	Object
------	------	--------

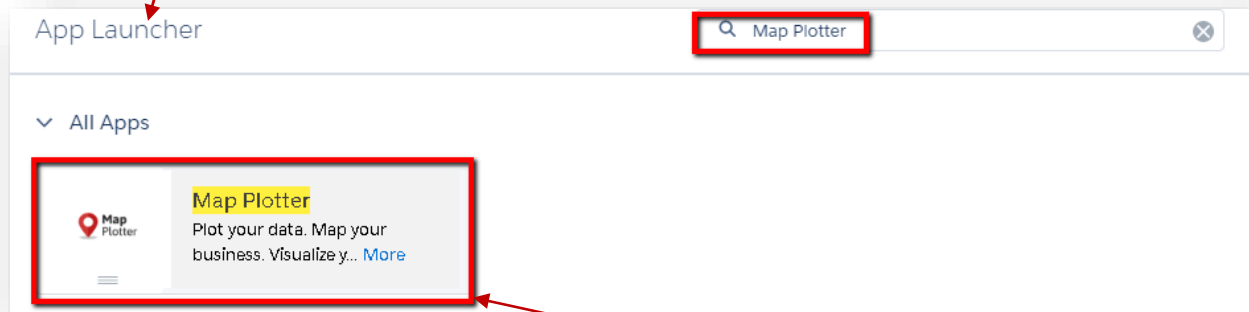
Trailhead

the fun way to learn Salesforce

VIEW FREE TUTORIALS >

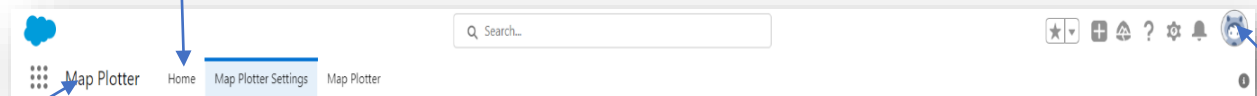
Step 2: Click on the “Map Plotter” from the top menu bar and select “Switch to Lightning Experience”.

Step 3: Open “App Launcher”
by clicking on  and
searching for “Map Plotter”
in the search box.



Step 4: Click on the “Map Plotter” Icon to open the app.

“Home Page” will
be displayed.



Click “Map Plotter” to access the Map Plotter home.

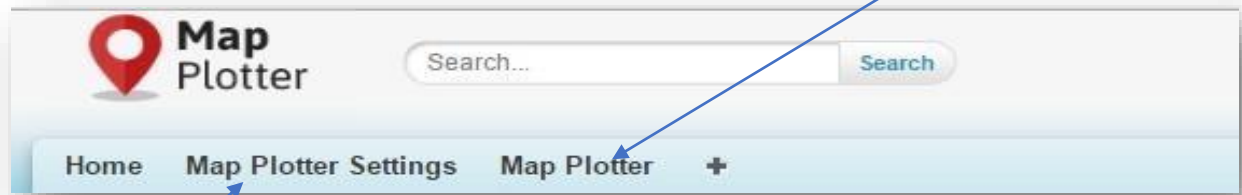
Click “Map Plotter Settings”,
to access the setting tab

You can go back to Salesforce Classic
by clicking the “Profile” button
and selecting “Switch to Salesforce
Classic”.

Accessing via Salesforce Classic

To access Map Plotter when you are using Salesforce Classic:

Open the **“Map Plotter”** app and the Salesforce classic view of the Map Plotter app will be displayed.



You can access the settings tab by clicking on **“Map Plotter Settings”** tab.

You can access the Map Plotter Home Page by clicking on the **“Map Plotter”** tab.

See Also

- [Uninstalling Map Plotter](#)
- [Troubleshooting](#)

Map Plotter Settings

- With the release of Map Plotter, you can map custom objects too
- The standard objects available to plot are Accounts, Leads, and Contacts

Setting API Keys

The Map Plotter application uses Google's geocoding services to geocode addresses. Hence, it becomes mandatory to generate the key and enter it before using the application.

- At the time of installation of the app, you will receive a daily quota (that is, the number of records that you can geocode)
- This quota is refreshed at midnight, Pacific Time every day

Note:

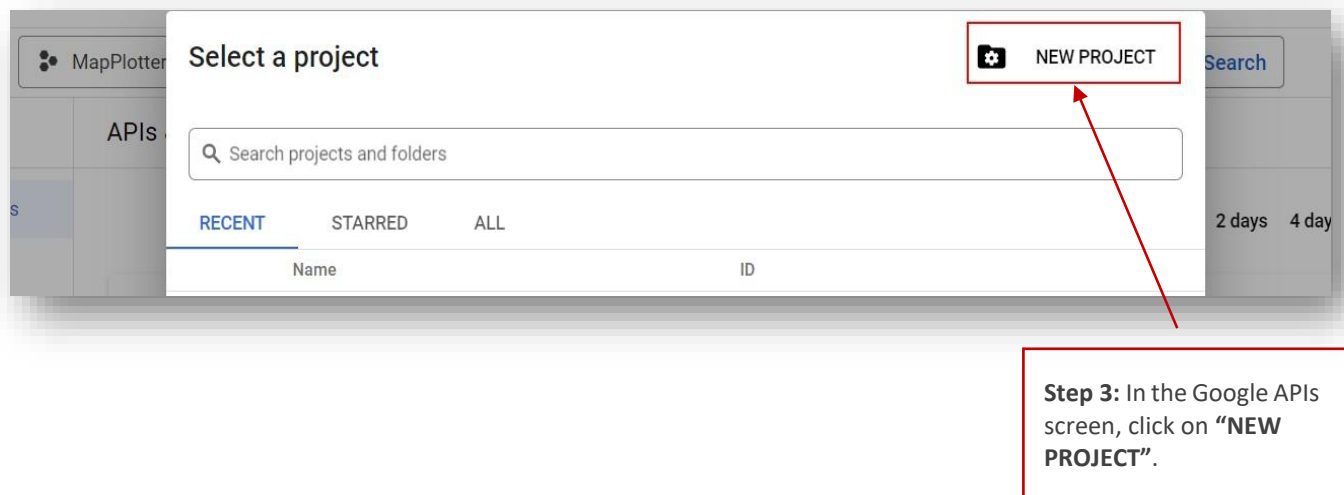
- At a time, a key can be used in only one org or Sandbox. Only one key can be active in an org.

Let us go through the steps to generate the API key:

Free Google API key

Step 1: Open code.google.com/apis/console.

Step 2: Enter your "Google credentials" to sign in to "Google Developers Console".



Step 4: Enter the project name in the “Project name” text box and click “Create”.

New Project

 You have 10 projects remaining in your quota. Request an increase or delete projects. [Learn more](#) 

[MANAGE QUOTAS](#) 

Project name *
MapPlotterAPIKey 

Project ID: mapplotterapikey-380006. It cannot be changed later. [EDIT](#)

Location *
 No organisation [BROWSE](#)

Parent organisation or folder

[CREATE](#) [CANCEL](#)

 Google Cloud  Search (/) for resources, do

 View all products

DASHBOARD ACTIVITY RECOMMENDA

PINNED

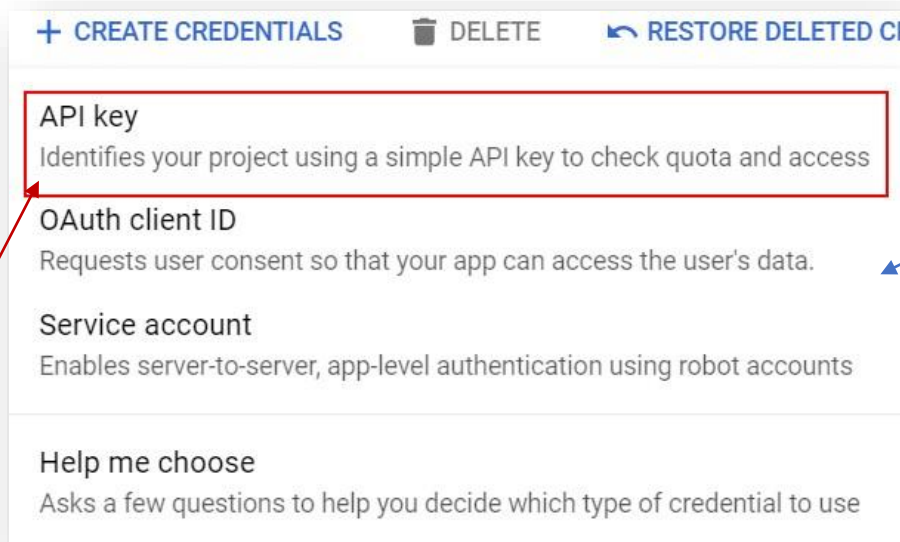
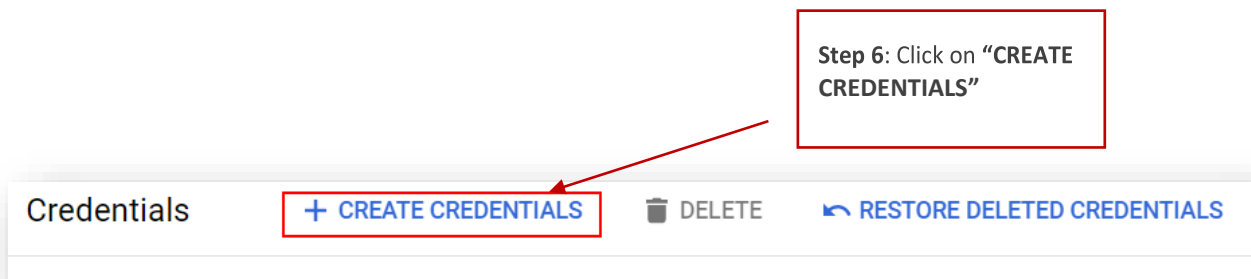
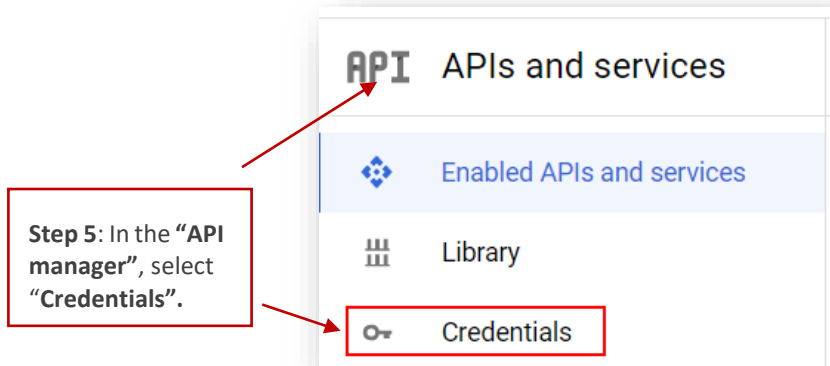
-  APIs and services >
-  Billing

 **Project info** 

Project name
MapPlotterAPIKey

Project number

The new project is created, and you are redirected to the “Dashboard”.



A dropdown list would appear when you click on “CREATE CREDENTIALS.”

The “API key” gets generated, and make sure you copy this key.

API key created

Use this key in your application by passing it with the `key=API_KEY` parameter.

Your API key

AIzaSyDPueP0bAAFd6P1w1HREhkXuV09gThXVZg



⚠ This key is unrestricted. To prevent unauthorised use, we recommend that you restrict where and for which APIs it can be used. [Edit API key](#) to add restrictions. [Learn more](#)

CLOSE

Map Plotter only works with “API keys” that are in unrestricted mode. So please **do not** add restrictions to the generated API key

Step 8: Click “Close”.

API APIs and services



Enabled APIs and services



Library

Step 9: Select the “Library” tab.



Street View Publish API
Google

Publishes 360 photos to Google Maps, along with position, orientation, and connectivity...



Geolocation API
Google Enterprise API ?

Location data from cell towers and WiFi nodes.



Maps SDK for Android
Google

Maps for your native Android app.



Roads API
Google Enterprise API ?

Snap-to-road functionality to accurately trace GPS breadcrumbs.



Address Validation API
Google

The Address Validation API allows developers to verify the accuracy of addresses.



Places API
Google Enterprise API ?

Get detailed information about 100 million places



Routes API
Google Enterprise API

Performance optimized versions of the Directions and Distance Matrix APIs

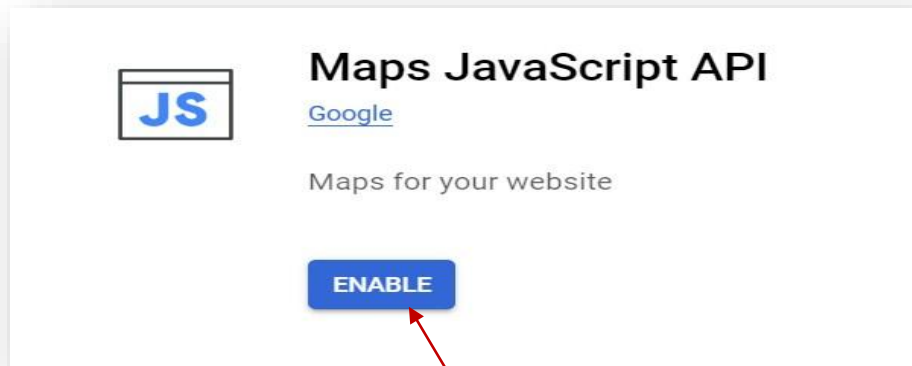


Maps JavaScript API
Google

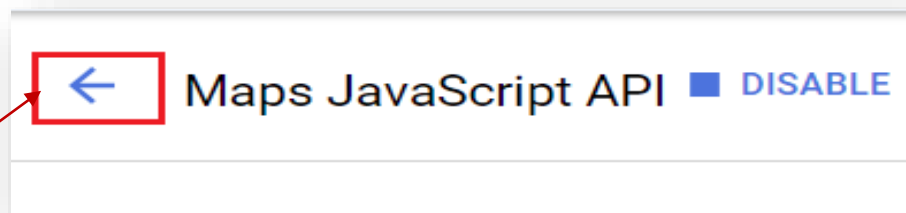
Maps for your website

These Tabs would be present.

Step 10: Select the “Maps JavaScript API” tab.

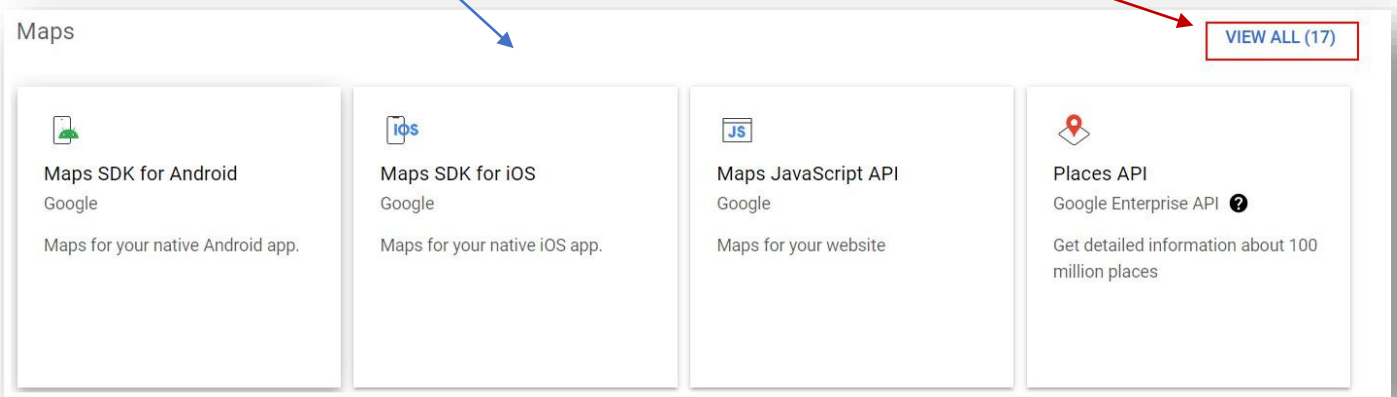


Step 11: Click the “Enable” on the Maps JavaScript API screen.



Step 12: Click “Back” (“left arrow” icon) to return to the previous screen and select the remaining APIs.

“Welcome to the new API Library” screen appears.



Step 13: Click “VIEW ALL”



Maps Static API

Google Enterprise API ?

Simple, embeddable map image with minimal code.



Geocoding API

Google Enterprise API ?

Convert between addresses and geographic coordinates.

Step 14: Select “Geocoding API”.

Step 15: Click “Enable” on the **Geocoding API** screen.

ENABLE



Places API

Google Enterprise API ?

Get detailed information about 100 million places



Routes API

Google Enterprise API

Performance optimized versions of the Directions and Distance Matrix APIs

Step 16: Select “Places API”.

Step 17: Click “Enable”
on the Places API
screen.

ENABLE

Step 18: Select
“Directions API”.



Directions API

Google Enterprise API ?

Directions between multiple
locations.



Maps Static API

Google Enterprise API ?

Simple, embeddable map image
with minimal code.

ENABLE

Step 19: Click “Enable”
on the Directions API
screen.

Enabling Google Maps Billing

Google has recently made changes to its maps platform that affected Google's free Maps API system, so there is the \$200 monthly usage for no charge, that applies towards each Maps-related billing account you create with the monthly credit. This monthly credit resets on the first day of each month, at midnight Pacific time.

To use this \$ 200-month usage, we need to enable Google Maps Billing and then generate a free Google Maps API key.

Note:

While Map Plotter is a completely free app, it uses Google's APIs internally, and Google has a pricing policy where they give users a free \$200 credit each month but need a credit card on file in case you exceed that. If you have less than 30,000 records in Salesforce, that you plan to geocode in Map Plotter, it is very unlikely that you will be charged anything.

- Here is a Google link with the details of the pricing for all APIs including the 4 that Map Plotter uses (Geocoding, Maps JavaScript, Directions, Places)
<https://developers.google.com/maps/billing-and-pricing/billing#assistance-from-google>

When you click the Geocode button highlighted in red, the Geocoding API is activated. Essentially, this initiates a call to the API, which then converts your physical addresses into latitude and longitude coordinates for plotting purposes, which means one per record geocoded.

- Geocoding an object and its corresponding API call is a one-time process. Once all records have been geocoded, the geocoding API won't be called again unless new records are added, or existing addresses are modified for previously geocoded objects.
- In terms of cost, Geocoding API consumes the most cost as compared to other APIs.
- To avoid the situation of being charged, please make sure you geocode less than 30,000 records collectively of all the objects that you want to geocode, exceeding this limit is chargeable.

Caveat:

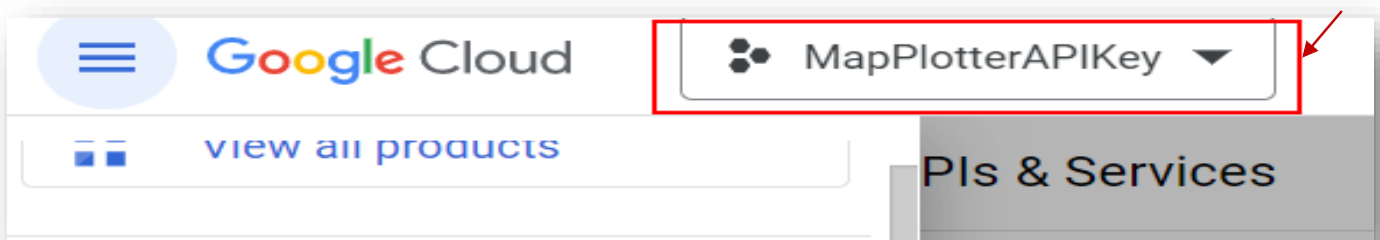
- You will need to provide your credit card details to enable Google Maps and generate an API Key.

To enable Google Maps Billing, follow these steps:

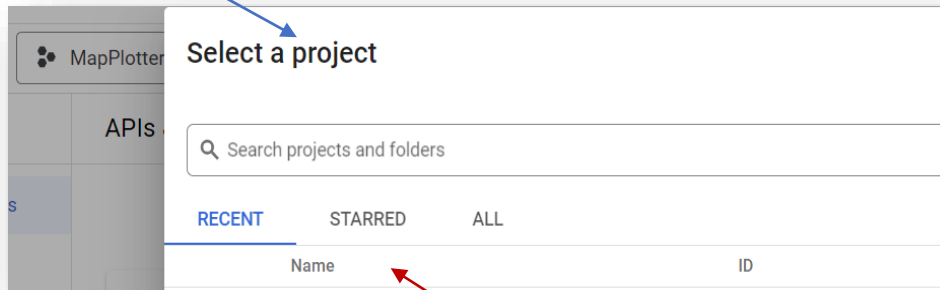
Step 1: Open <https://cloud.google.com/>.

Step 2: Enter your “Google credentials” to sign in to “Google Developers Console”.

Step 3: Click the “Select a Project” button to select a project.

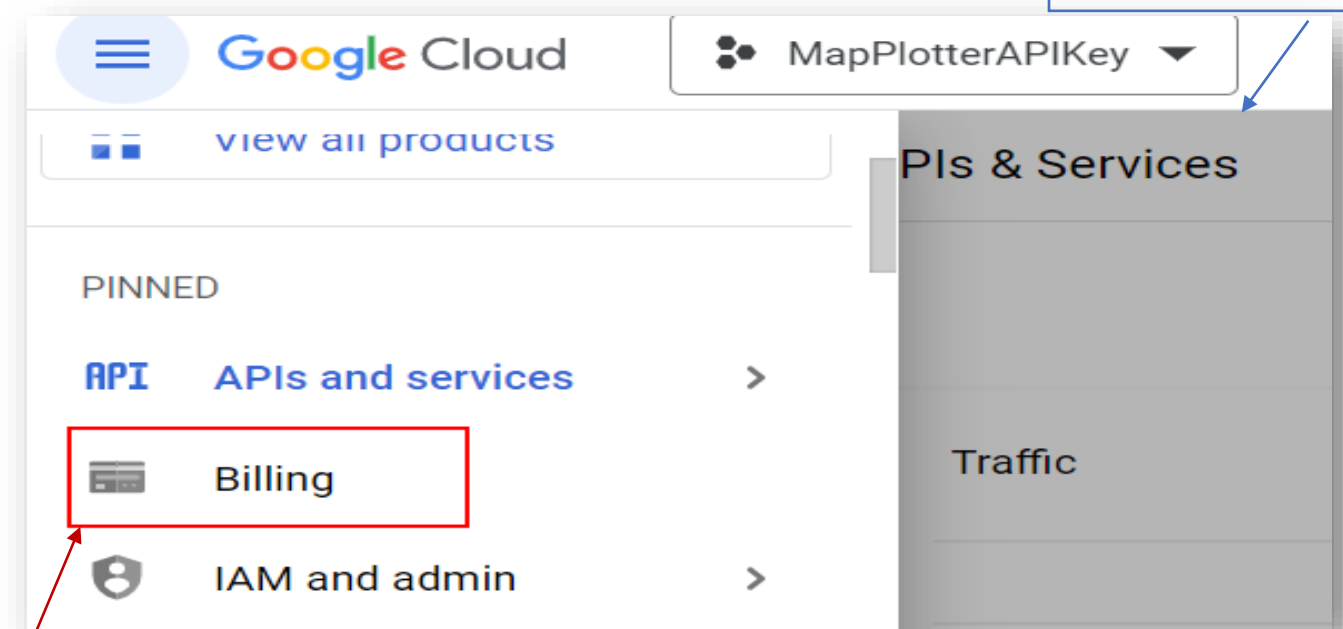


The “Select a project” pop-up window appears.



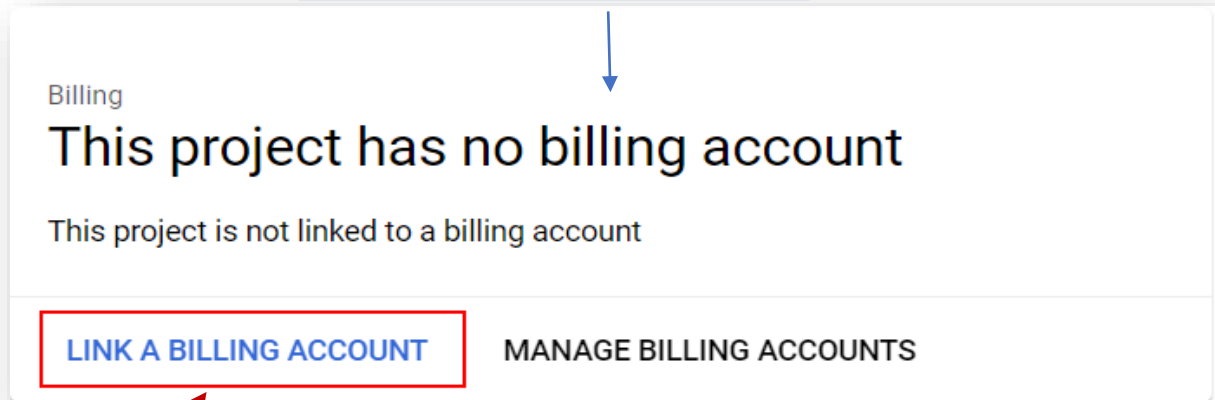
Step 4: Select a “Project” under Name.

The selected “Project’s dashboard” appears.



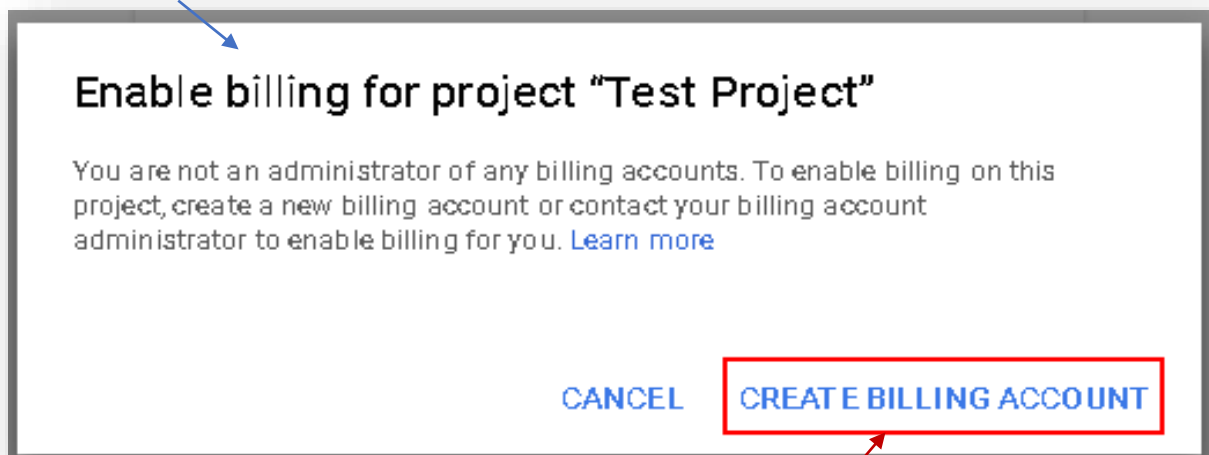
Step 5: Click on “Billing”.

The Billing page appears where you can “Link a billing account” or “Manage billing account”.



Step 6: Click on the “Link A Billing Account” button.

The “Enable billing for project” pop-up appears.



Step 7: Click on “CREATE BILLING ACCOUNT”.

The “Google Cloud Platform” screen appears.

Step 1 of 2 Account information

 harish soni

[SWITCH ACCOUNT](#)

Country

India

What best describes your organisation or needs?

Please select

Terms of Service

☒ I have read and agree to the [Google Cloud Platform Terms of Service](#), [Supplemental Free Trial Terms of Service](#) and the Terms of Service of [any applicable services and APIs](#).

Required to continue

[CONTINUE](#)

Access to all Cloud Platform products

Get everything that you need to build and run your apps, websites and services, including Firebase and the Google Maps API.

\$300 credit for free

Put Google Cloud to work with \$300 in credit to spend over the next 90 days.

No auto-charge after free trial ends

We ask you for your credit card details to make sure that you are not a robot. You won't be charged unless you manually upgrade to a paid account.

Step 8: Select your country under the “Country” dropdown list.

Step 9: Select which best describes your “organization or needs”.

Step 10: Check the “Box” once you read and agreed to the Terms and Conditions and click “Continue”.

The “**Payment Information Verification**” screen appears where you need to enter the necessary information.

Try Google Cloud for free

Step 2 of 2 Payment Information Verification

Your payment information helps us reduce fraud and abuse. You won't be charged unless you turn on automatic billing.

Account type 

Business

Only Business accounts can have multiple users. You cannot change the account type after signing up. In some countries, this selection affects your tax options. If you choose Individual as your account type, you agree that use of your account is for your trade, business, craft, or profession. [Learn more](#)

Business name

Payment method

Card details

When billing starts, you'll be charged automatically each month.

 Reserve Bank of India requires that cards support automatic payments according to RBI regulations. If your card doesn't support automatic payments, you'll need to make manual payments or use a different card. We'll check your card in the next step. [Learn more](#)

Tax information  

Tax status: Business

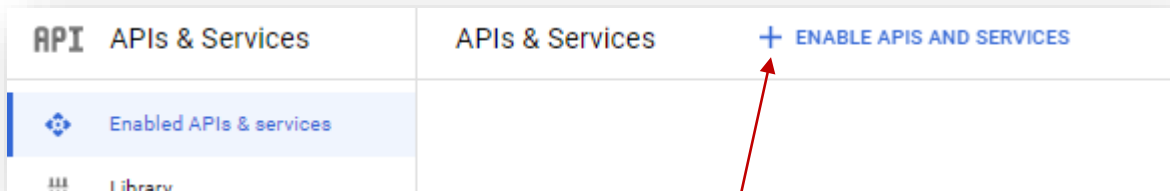
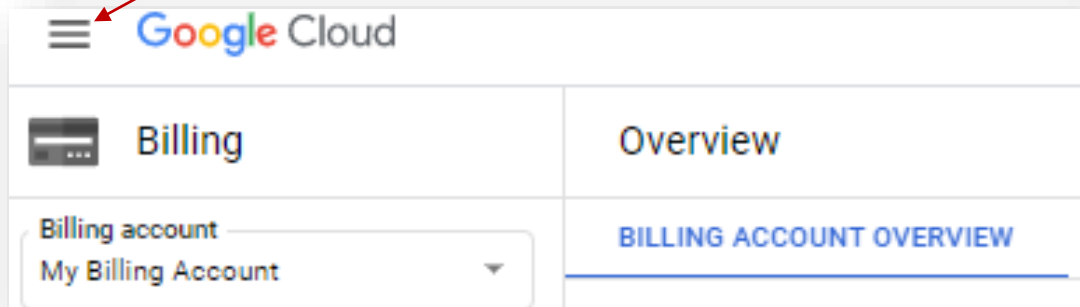
The personal information you provide here will be added to your payments profile. It will be stored securely and treated in accordance with the [Google Privacy Policy](#).

START MY FREE TRIAL

Step 11:
Select
“**Account
Type**”, Enter
your “**Business
name**” and
“**Card details**”.

Step 12: Enter “**Tax
information**” and click “**START
MY FREE TRIAL**”.

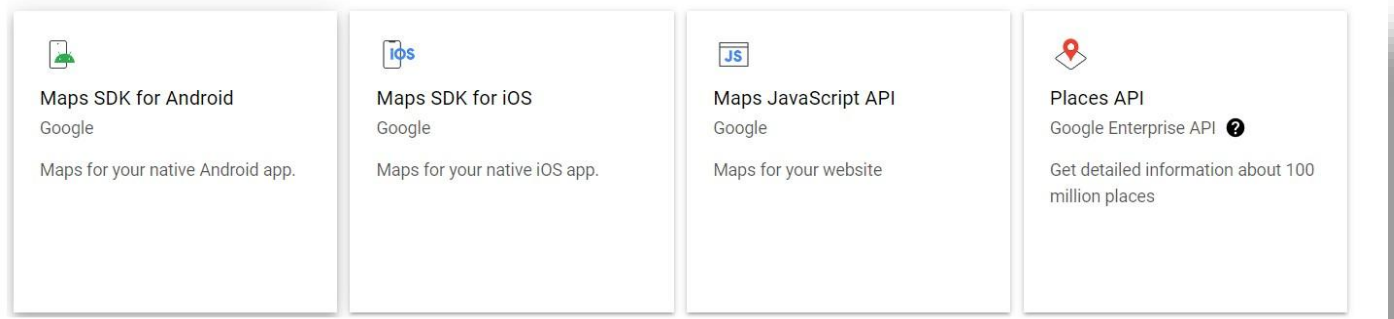
Step 13: In the “Billing” screen, click the  button at the top left corner to open the Navigation menu and click “APIs & Services”.

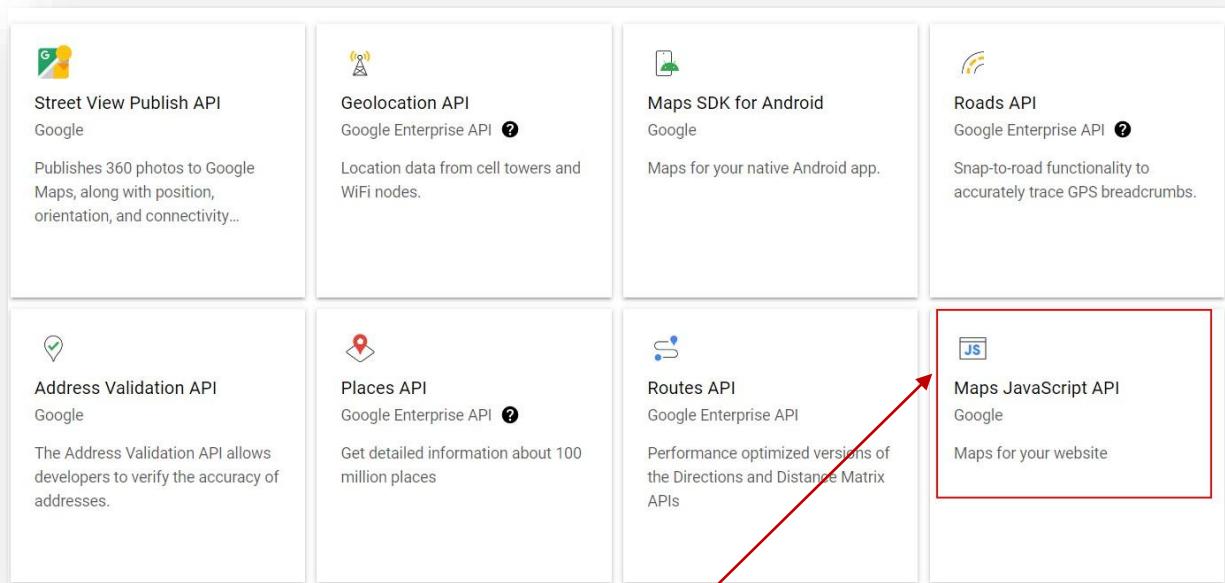


Step 14: In the “APIs & Services” screen, click “ENABLE APIS AND SERVICES”.

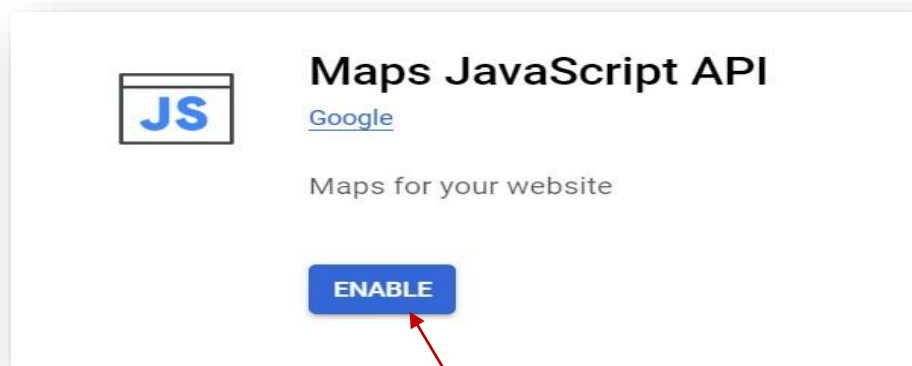
Step 15: In the “Maps” section, click on “VIEW ALL”.

Maps





Step 16: Click “Maps JavaScript API”.



Step 17: Click the “Enable” on the Maps JavaScript API screen.

Step 18: In the next screen, on the top navigation, click “Quotas”.

Maps JavaScript API ■ DISABLE

Metrics **Quotas** Credentials

All API versions ▾ All API credentials ▾ All API methods ▾

Traffic By response code ▾

Requests/sec (1 min average)

Quota Name	Limit	
Premium plan web service requests per day	Unlimited	
Premium plan web service requests per 100 seconds	5,000	
Premium plan web service requests per 100 seconds per user	Unlimited	

Step 19: In the “Map Loads” section, click the  icon for the “Map loads per day” option.

Step 20: In the Map loads quota limit pop up, “**uncheck**” the Unlimited check box and enter your “**daily limit**” in the Quota limit text box.

Premium plan web service requests quota limit

Enter a number or choose unlimited.

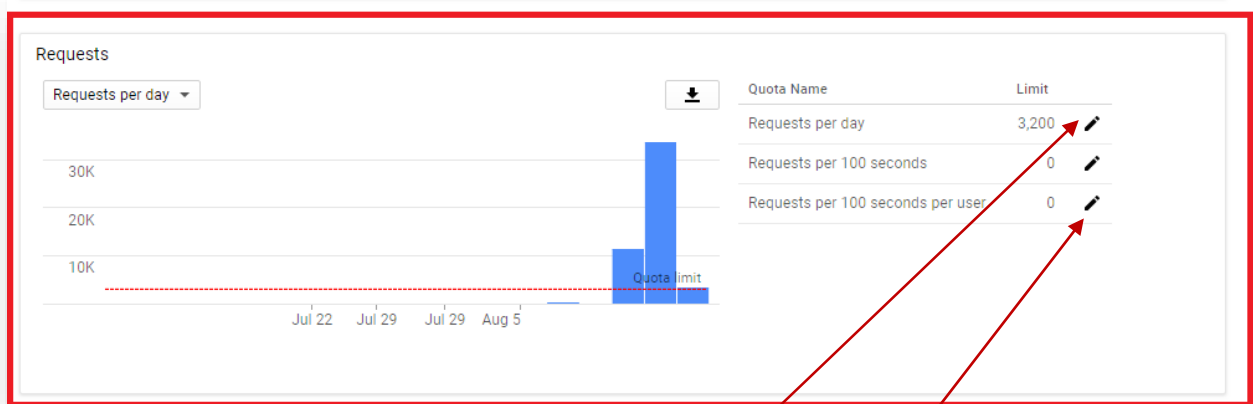
Quota limit

Enter a number

☐ Unlimited

CANCEL

SAVE

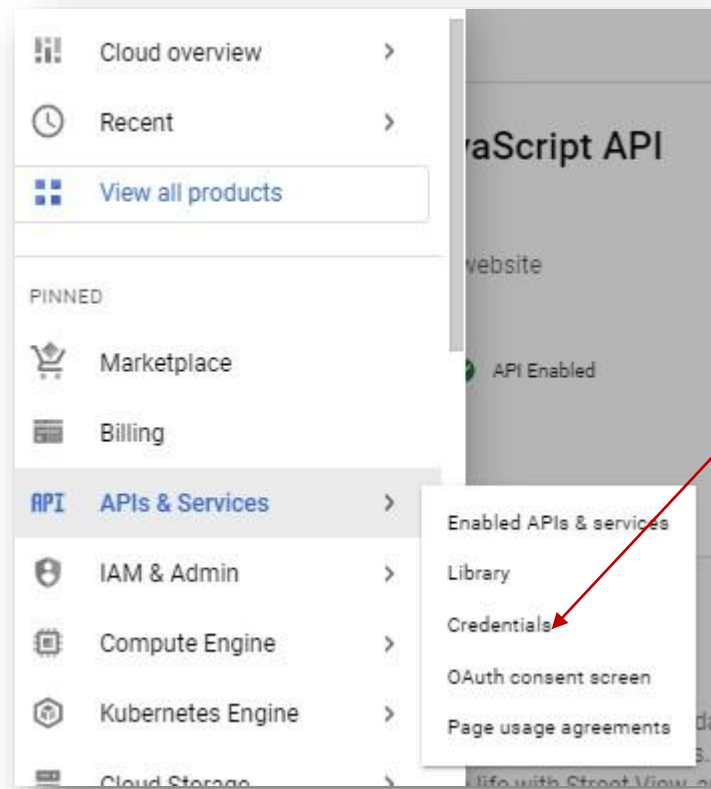


Step 21: In the Requests sections, set the “Requests per day” and other Requests limit options.

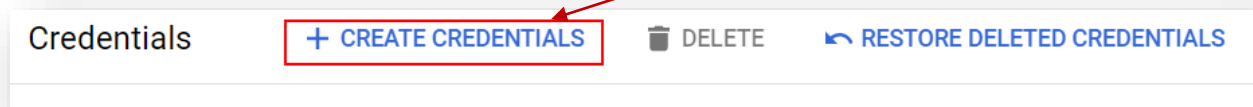
Step 22: Select the “confirmation” checkbox and click “Save”.

Step 23: Click the icon for the Map loads “per 100 seconds” option and repeat “[Steps 20 and 21](#)”.

- You can plan to divide your budget using the [Google Pricing Calculator](#) for the following services.
 - i. Maps
 - Dynamic Maps
 - ii. Routes
 - Directions
 - iii. Places
 - Places - Nearby Search + Basic Data + Contact Data + Atmosphere Data
 - Geocoding



Step 24: Go to “APIs & Services” in the navigation menu and Click on “Credentials”.



Step 25: Click on “CREATE CREDENTIALS”

+ CREATE CREDENTIALS DELETE RESTORE DELETED CREDENTIALS

API key
Identifies your project using a simple API key to check quota and access

OAuth client ID
Requests user consent so that your app can access the user's data.

Service account
Enables server-to-server, app-level authentication using robot accounts

Help me choose
Asks a few questions to help you decide which type of credential to use

Step 26:
Select the
“API key”
from the
dropdown
list.

A dropdown list
would appear when
you click on “**CREATE
CREDENTIALS**”.

API Keys

☐	Name	Creation date ↓	Restrictions	Actions
☐	API key 1	Mar 12, 2023	None	SHOW KEY ⋮ Edit API key Delete API key

OAuth 2.0 Client IDs

The API key is
created.

Step 27: Click on “**Edit
API key**”.

Name *

MapPlotter API Key

Use a unique name to identify your API key

Key restrictions

Add restrictions to reduce security risk and prevent unauthorized use. [Learn more](#)

This key is unrestricted. To prevent unauthorized use, we recommend restricting where and for which APIs it can be used. [Learn more](#)

Step 28: Enter a **"Name"** for the API key, Select Set the application restriction to **"None"**.

Application restrictions ?

- ☒ None
- ☐ Websites
- ☐ IP addresses
- ☐ Android apps
- ☐ iOS apps

API restrictions ?

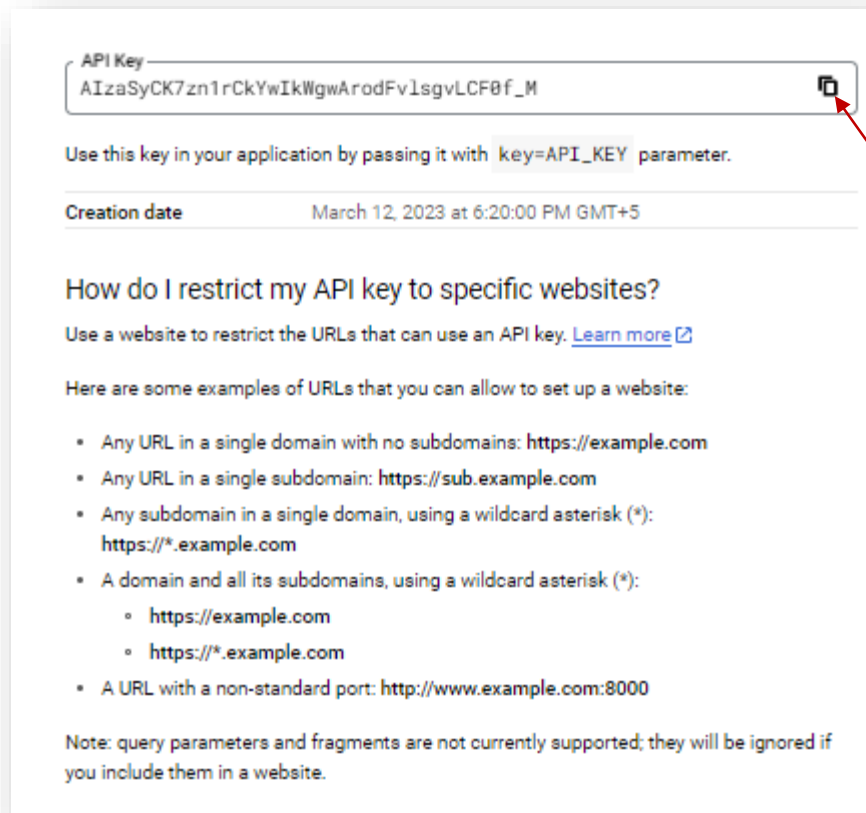
- ☒ Don't restrict key
This key can call any API
- ☐ Restrict key

Note: It may take up to 5 minutes for settings to take effect

Save

Cancel

Step 29: Click **"Don't restrict key"** so the APIKey is not restricted and click **"Save"**.



Step 30: Copy the “API key” and use it in the Map Plotter website.

Note:

- You can plan and calculate your budget for Google APIs usage, for the Map Plotter web site, using the [Google Pricing Calculator](#) (Map Platform)

Setting API Keys in Map Plotter

After generating the Google API key, let us see the steps on how to use them in the Map Plotter application.

Setting up the free Google API key

Step 1: Log in to the Map Plotter app.

Step 2: Click “Map Plotter Settings”.

The “Setup Geocoding API” tab will be displayed.

Step 3: Enter the “Google API key” and click “Submit”. For more details on how to generate the key, please refer to, [Setting API Keys](#).

Note:

- This completes the setup required to start using the Map Plotter app

Setting Up Custom Mapping

Before you can start plotting Data Points in Map Plotter, you have to,

- 1) Map an object
- 2) Geocode the mapped object

Mapping an Object

To map an object:

Step 1: Click on **Setup Custom Mapping**

Step 2: Select a “custom object” or a “standard object” that you wish you mapped.

Step 3: Select the “necessary details” for the object and click “Save”.

The screenshot shows the 'Setup Custom Mapping' page in the Map Plotter application. The interface includes a sidebar with navigation links: 'Setup Geocoding API', 'Setup Custom Mapping' (highlighted with a red box and a red arrow labeled '1'), and 'Geocoding Status'. The main content area is titled 'Setup Custom Mapping' and contains a section 'Select Object for Field Mapping' with a dropdown menu showing 'Lead' (labeled with a red box and a red arrow labeled '2'). Below this is a form with six dropdown menus for mapping fields: 'Entity Name' (First Name), 'City' (City), 'Street' (Street), 'State' (State/Province), 'Country' (Country), and 'Postal Code' (Zip/Postal Code). A red box labeled '3' highlights the 'Save' button. Below the form is a table titled 'Objects Going To Geocode' with columns: Entity, Country, State, City, Street, and Postal Code. The table contains two rows: 'Account' and 'Contact'. Each row has 'Geocode' and 'Delete' buttons. A red box labeled '4' highlights the 'Geocode' button for the 'Account' row.

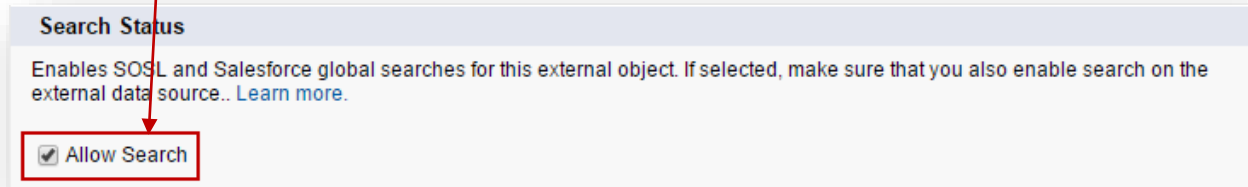
Object will be added to the list of objects to be geocoded on “Object Going to Geocode”.

Note:

- Make sure that the mapping fields related to custom objects are correct
- Use string data type for Country, City, State, Zip, and street - Map Plotter will be able to successfully geocode a custom object if the data is available

Caveat:

While creating a custom object make sure to **“check”** the Allow Search option. This way Map Plotter will be able to show the custom objects in the drop-down list of Setup Custom Mapping.



Geocoding the Mapped Object

To geocode a mapped object:

Step 1: Click on “Map Plotter Settings” tab.

Step 2: Click on “Setup Custom Mapping”.

The screenshot shows the Map Plotter Settings page. The left sidebar has tabs: Home, Map Plotter Settings (selected), Map Plotter, and a plus icon. Under Map Plotter Settings, there are three options: Setup Geocoding API, Setup Custom Mapping (selected), and Geocoding Status. The main content area has a 'Select Object for Field Mapping' dropdown menu. Below this is a table titled 'Objects Going To Geocode' with columns: Entity, Country, State, City, Street, and Postal Code. The table lists three objects: Account, Contact, and Lead. Each object has a 'Geocode' button and a 'Delete' button. Red arrows and numbers indicate the steps: 1 points to the 'Map Plotter Settings' tab, 2 points to the 'Setup Custom Mapping' option, and 3 points to the 'Geocode' button for the 'Lead' object.

Step 3: Click “Geocode” for the object that you wish to geocode.

Note:

- Map Plotter can geocode a maximum of 10 objects at a time
- The records in the object are geocoded in batches of 50

Caveat:

- Once the geocoding process has started, wait for it to complete before clicking Geocode button again

Deleting a Geocoded Object

To delete a geocoded object

Step 1: Click on “Map Plotter Settings” tab.

Step 2: Click on “Setup Custom Mapping”.

The screenshot shows the Map Plotter Settings page. The 'Map Plotter Settings' tab is selected in the top navigation bar. In the left sidebar, the 'Setup Custom Mapping' option is highlighted with a red box and a red arrow pointing to it, labeled 'Step 1'. The main content area shows the 'Setup Custom Mapping' section, which includes a 'Select Object for Field Mapping' dropdown menu. Below this is a table titled 'Objects Going To Geocode' with columns for Entity, Country, State, City, Street, and Postal Code. The table lists two entities: 'Account' and 'Contact'. Each entity has a 'Geocode' button and a 'Delete' button. A red arrow points to the 'Delete' button for the 'Contact' entity, labeled 'Step 3'.

Entity	Country	State	City	Street	Postal Code	Geocode	Delete
Account	BillingCountry	BillingState	BillingCity	BillingStreet	BillingPostalCode	Geocode	Delete
Contact	MailingCountry	MailingState	MailingCity	MailingStreet	MailingPostalCode	Geocode	Delete

Step 3: Click “Delete” for the object that you want to delete.

Checking Geocoding Status

- The geocoding status shows the result of geocoding for an object
- It shows the number of successfully geocoded points
- It also shows the failed and pending geocoded points
- You can pull the status for each geocoded object

To View Geocoding Status

The screenshot shows the 'Geocoding Status' page in a web application. The interface includes a sidebar with navigation links, a main content area with a summary table, and a detailed table of geocoded objects. Red boxes and arrows highlight specific steps for navigating and viewing the data.

Step 1: Click on "Map Plotter Settings" tab.

Step 2: Click on "Geocoding Status".

Step 3: Select the "object" you wish to see the geocoding result for and click "Show Results".

Step 4: The geocoding result will be displayed.

Step 5: To view record details as per their geocoding status, click the "result" box for each status.

Step 8: Click the "Show Results" button.

Step 6: Select the country (USA) from the dropdown menu.

Step 7: Click the "result" box for the 'Success' status.

Account	Show Results	Export
Success	Failed	Pending
60	14	0
Total 74/74		

Name	Street	City	State	Postal Code	Country
Burlington Textiles Corp of America	525 S. Lexington Ave	Burlington	NC	27215	USA

Step 8: You can export the status in csv, Excel, and PDF format by clicking the “Export” button and selecting the required format.

Step 6: You can use the “Search” box to search for a specific record.

The screenshot shows a web application interface. At the top, there are buttons for "Show Results" and "Export", with a red box labeled "8" next to the "Export" button. Below these buttons is a summary table:

Failed	Pending	Total
14	0	74/74

Below the summary table is a search bar with the text "USA" and a red box labeled "6" next to it. To the right of the search bar is a magnifying glass icon. Below the search bar is a table with columns: City, State, Postal Code, and Country. The first row of data shows "Burlington", "NC", "27215", and "USA". A red box labeled "7" is next to the "Postal Code" header. A red arrow points from the "Export" button to the "8" box. A red arrow points from the search bar to the "6" box. A blue arrow points from the magnifying glass icon to the search bar. A red arrow points from the "arrows" in the table headers to the sorting arrows.

Step 7: You can sort the results as per the headings, by using the “arrows”.

You can enter search value for any of the field as shown in the status. For example, if you enter USA it will search for all records with matching keyword and display it in the results.

See Also

- [Viewing Map Point Information](#)

Map Plotter Tab

- Once the objects are geocoded, you can plot them on a map
- Successfully geocoded points can be plotted on the map

Map Plotter is the second tab in the Map Plotter app.

- It lists the Data Points that are available.
- At the highest level, you will find the country, then the next level is the state within the country and the last level is the city within the state
- You can expand the view by using the down arrow and selecting the state or city that you wish to plot on a map
- You can use the check box on the left-hand side to select your choice. Let us look at the various options available in this tab
- You can filter Data Points and plot them on the map using the following options:
 1. Locations
 2. Filter
 3. Search
 4. Tools

Locations

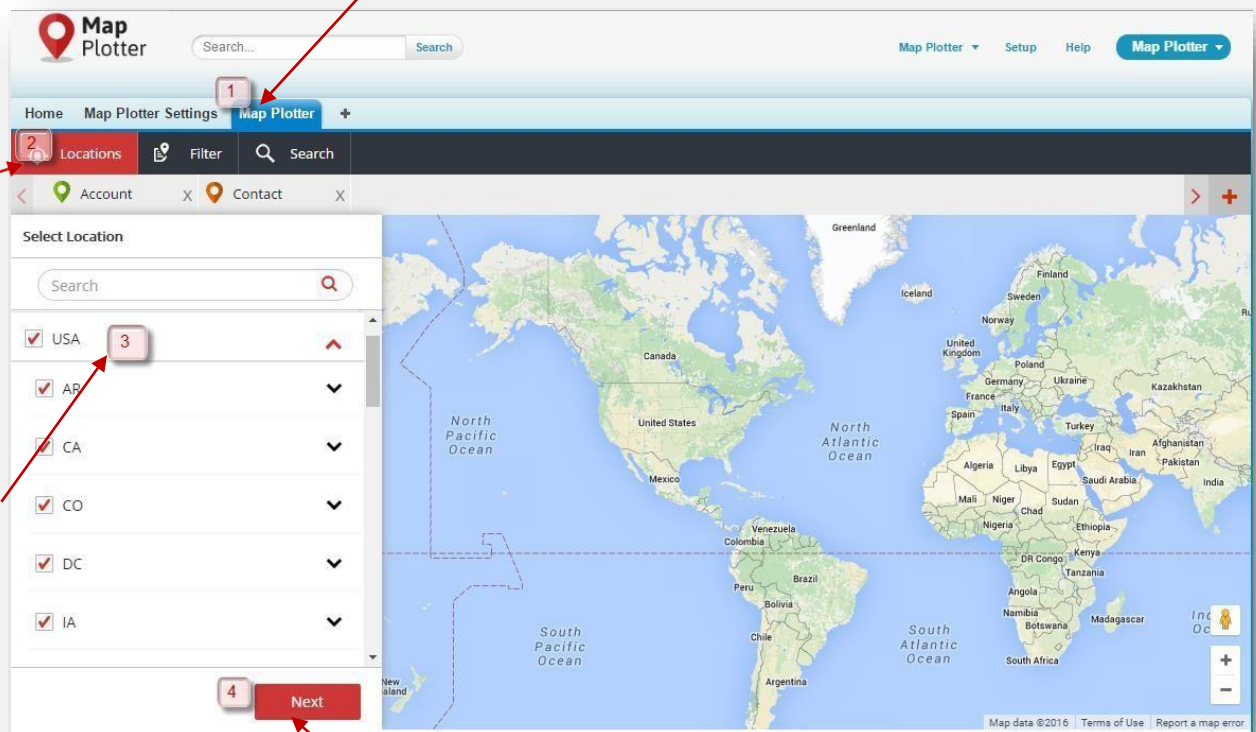
- In this tab, you get to see all the available locations in the **“Select Location”** window
- You can search for locations and arrange the location in the order of your choice from this window. Let us see more details about it

To Plot Objects Using Locations Tab in Map Plotter

Step 1: Click on “Map Plotter” tab.

Step 2: The “Locations” tab will be displayed.

Step 3: Select the “Location(s)”.



Step 4: Click on “Next”.

Step 5: If you wish to change the Data Points that you had selected earlier, click the **“Edit Locations”** button. Follow the same steps to select the Data Points.

The screenshot shows the 'Map Plotter' interface. At the top, there are tabs for 'Home', 'Map Plotter Settings', and 'Map Plotter'. Below these are buttons for 'Locations', 'Filter', and 'Search'. A search bar contains the text 'HS' and shows '7' results. A list of data points is displayed on the left, each with a checkbox, a name, and a colored pin icon. The list includes: Gateway Rehab Hsp At Norton Healthc are Pav, Goldman Sachs Group, HSBC Holdings, Healthsouth Lakeview Rehab Hospital, Healthsouth Northern Ky Rehab Hospital, and Norton Hsp/Kosair Chdrn Hsp/Norton Healthcare Pav. A world map is shown on the right. Red arrows point from text boxes to the search bar, the data point list, and the map.

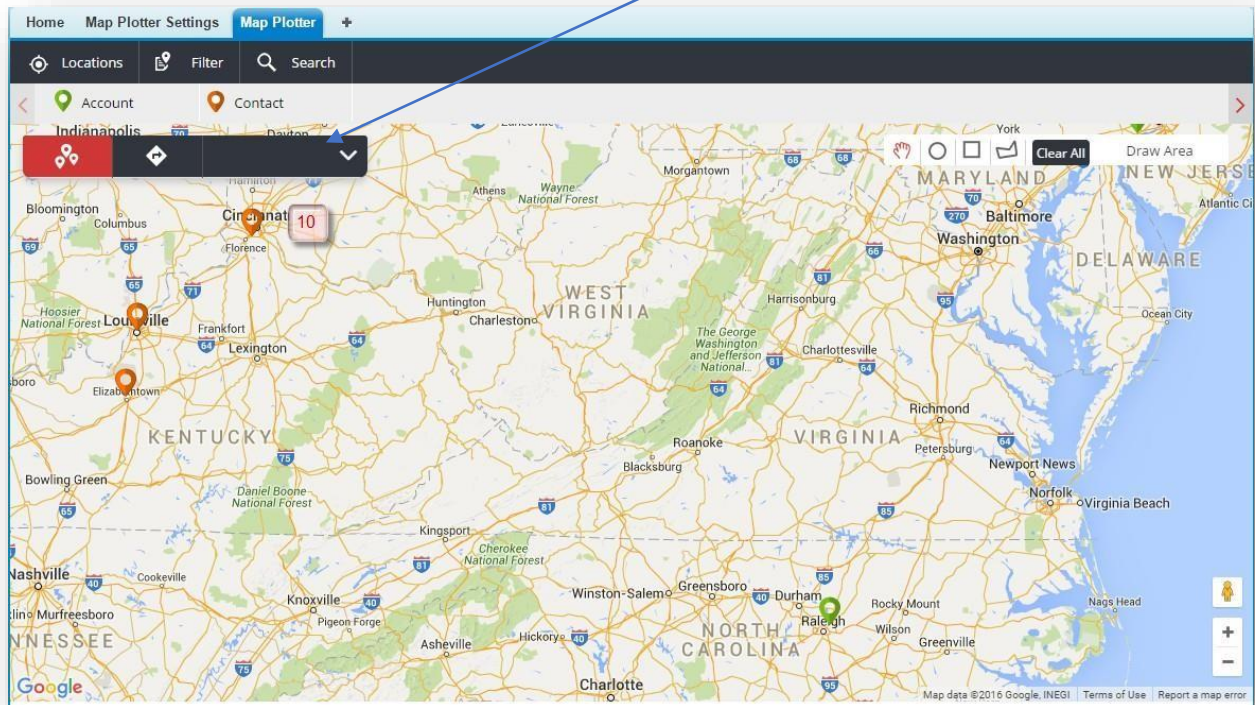
Step 7: Use can use **“Search”** box to locate a specific record in the **“Data Point Name”** list.

Step 6: If not, select the **“Data Point Name”** that you wish to plot on map. Note that a color-coded pin is associated with every Data Point Name.

Step 8: You can sort the **“Data Points by Data Point Name or Type”**. Use the arrows provided to sort the record list. You can export the data in csv, Excel, or PDF format by clicking the Export button.

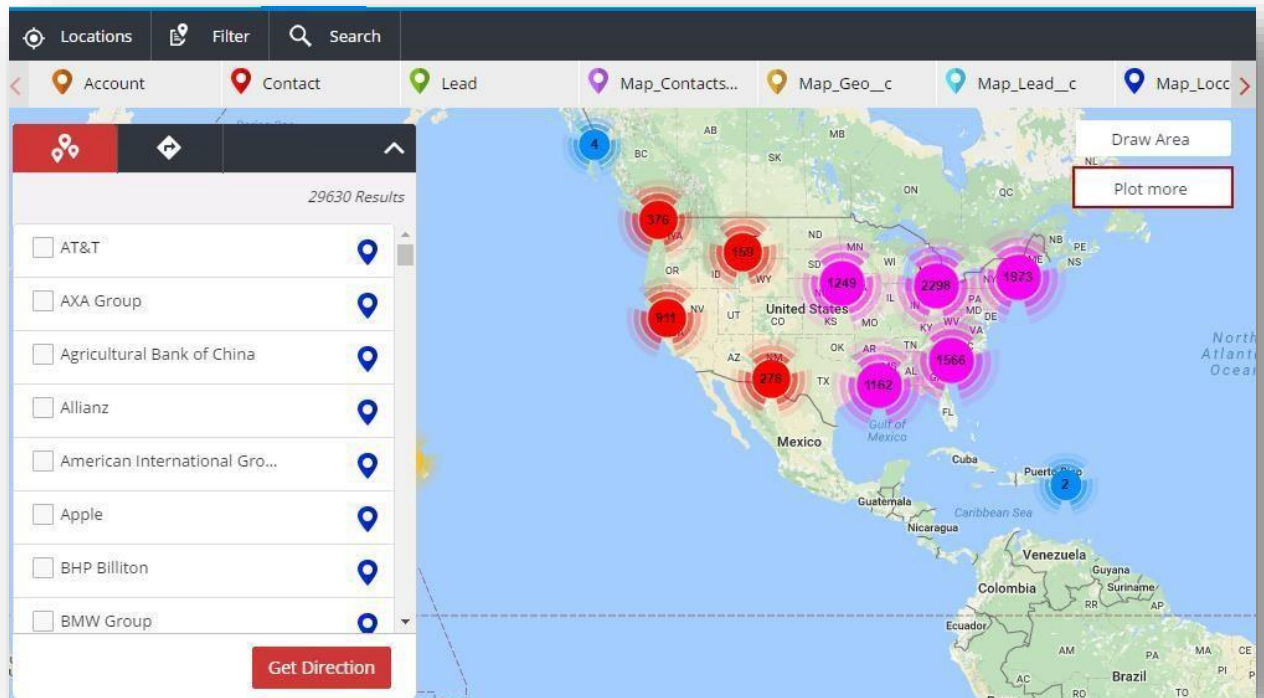
Step 9: Click the “Plot on Map” button.

The selected Data Points will be plotted, and you can locate them by using the legend.



Note:

- Map Plotter can plot a maximum of 10,000 records at a time
- If you have more than 10,000 records, please click “Plot More”, to continue plotting the records on a map



- You can get directions between the plotted points, Please refer to [Getting Directions in Map Plotter](#) for more details
- For further filtering the mapped Data Points, you can use the draw tool, Please refer to [Applying tools on Mapped Data Points](#) for more details

Adding Data Points

- You can select to view Data Points related to only a selected object too
- Map Plotter has the option to show Data Points depending on the object

To add Data Points for an object:

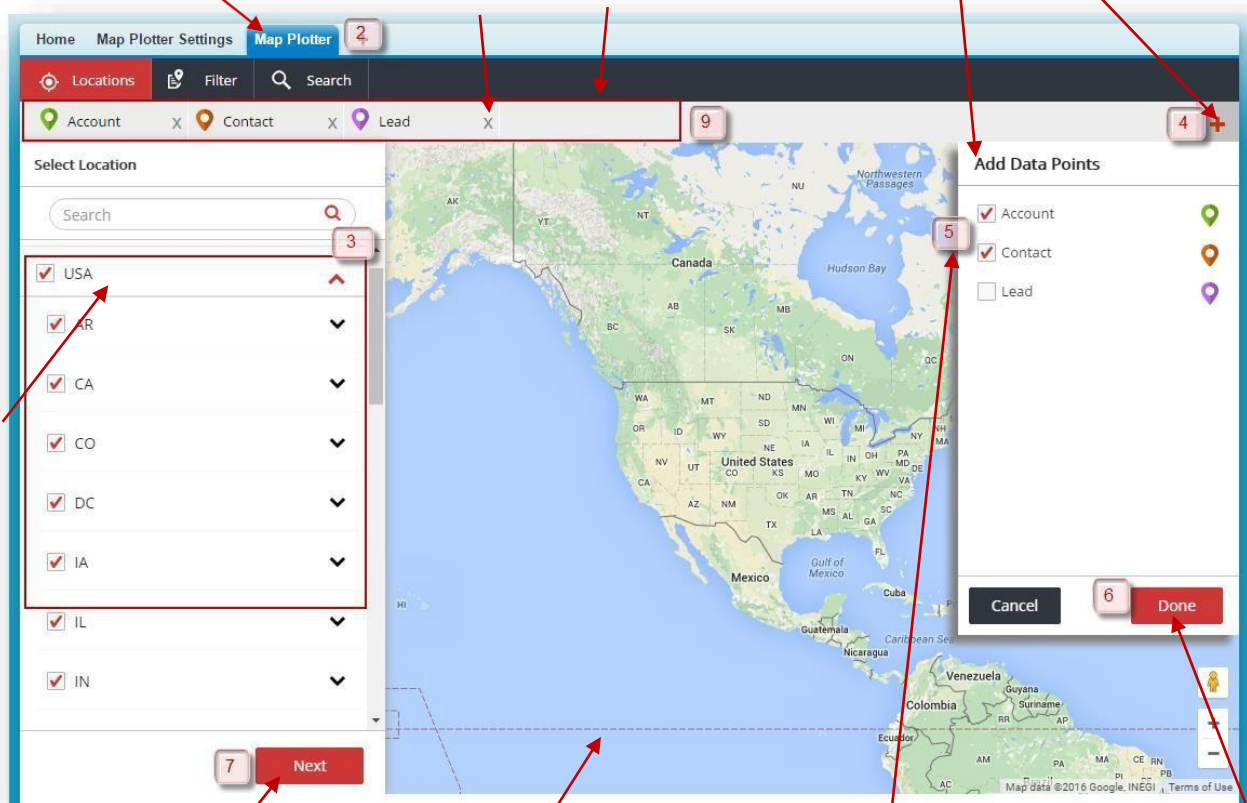
Step 1: Open the “Map Plotter” app.

Step 2: Click on “Map Plotter” tab.

Step 9: you can select the “object(s)” from the top menu bar. Remove the object(s), for which you do not wish to plot Data Points on map, by clicking “X”

Step 4: Click “+” and “Add Data Points” window will be displayed.

Step 3: Select the “Location(s)” to be mapped.



Step 7: Click “Next” from the Select Location window.

Step 8: Map Plotter will show map Data Points corresponding to the selected object(s) only.

Step 5: Select the “objects”, for which you wish to see Data Points.

Step 6: Click on “Done”.

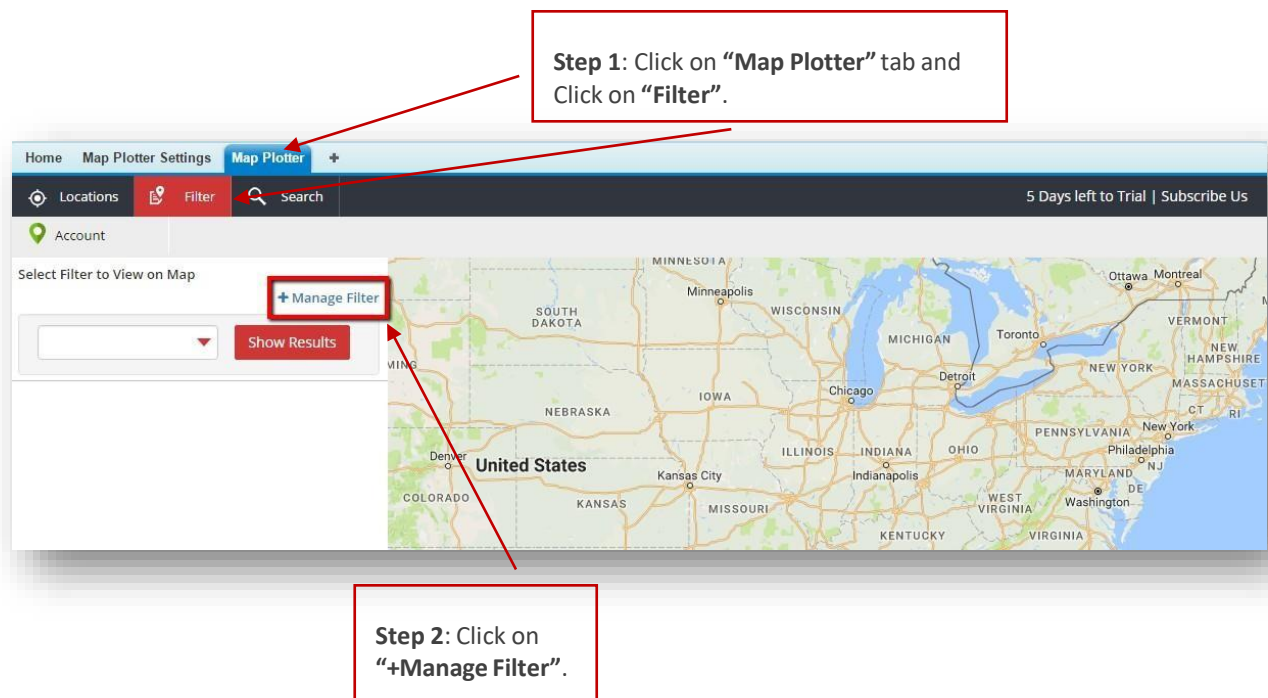
Filter

- You can create your filters to pull Data Points for a set of criteria. Map Plotter provides you with the option to save these filters for future use

Creating a New Filter

- Filters are nothing but queries, which you can write on Salesforce objects
- You can write and store these queries to find records matching your business and plot them on a map
- In Map Plotter, you can create a Normal or Colored filter. Click [here](#) to know how to create a Normal filter
- Map Plotter provides you with the facility to create and store filters with color-coding
- You can use this type of filter when you have to filter data points satisfying certain conditions and belonging to a group. For example, you can color code Account Names starting with C, A, etc., for different Billing Countries
- Let us look at how you can achieve this, click [here](#)

To Create a New Normal Filter:



Step 4: Give a unique name for the filter in “Filter Name”.

Step 3: Click on the “Create Filter” tab.

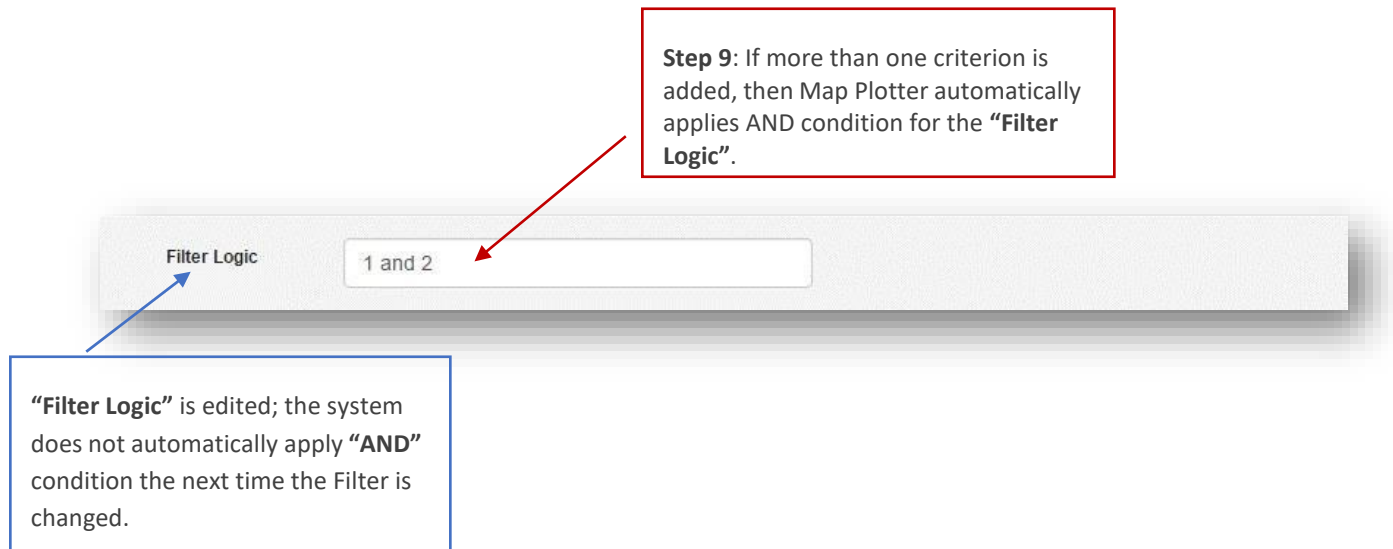
Step 5: Provide more details for your reference in “Description”.

Step 6: Select the object for which you wish to create the Filter from the drop-down in “Base Objects”.

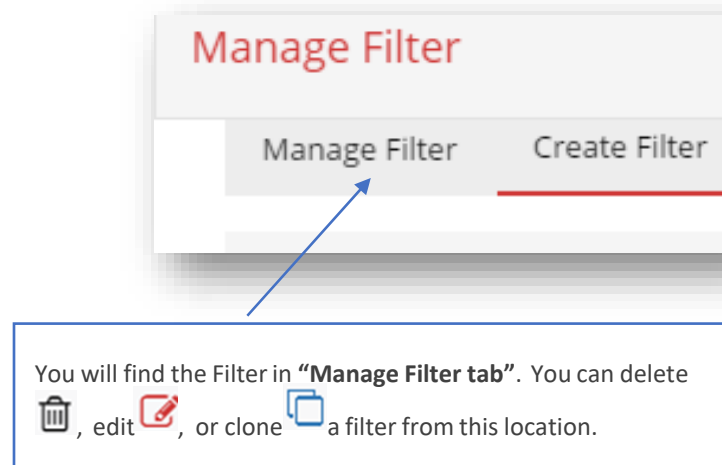
Step 7: Select “Filter Type” as Normal.

Step 8: Click on Add “Criteria”.

You can add filter criteria. Click “Add Criteria” to add more filter criteria. Maximum allowed filter criteria are 10.

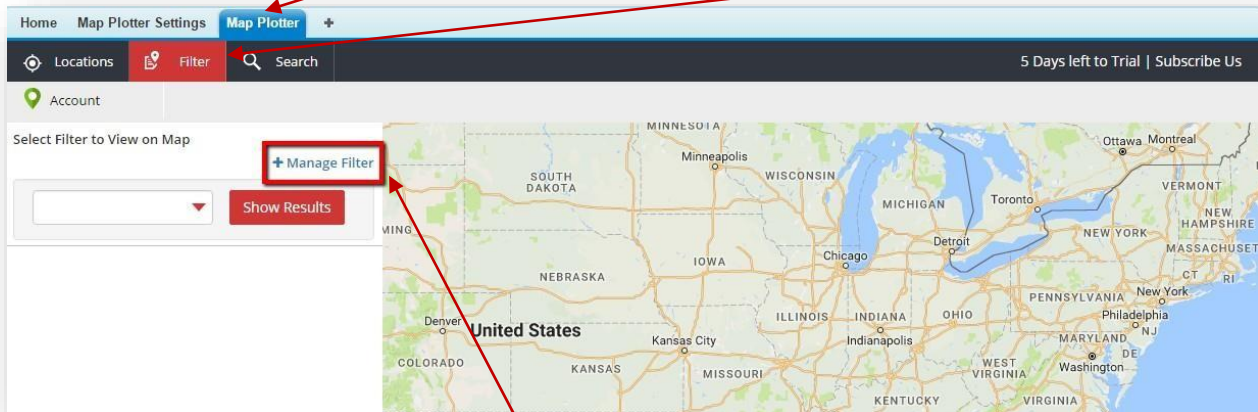


Step 10: Click the **“Save Filter”** button.



To Create a New Colored Filter:

Step 1: Click on “Map Plotter” tab and Click on “Filter”.



Step 2: Click on “+Manage Filter”.

Step 4: Give a unique name for the filter in “Filter Name”.

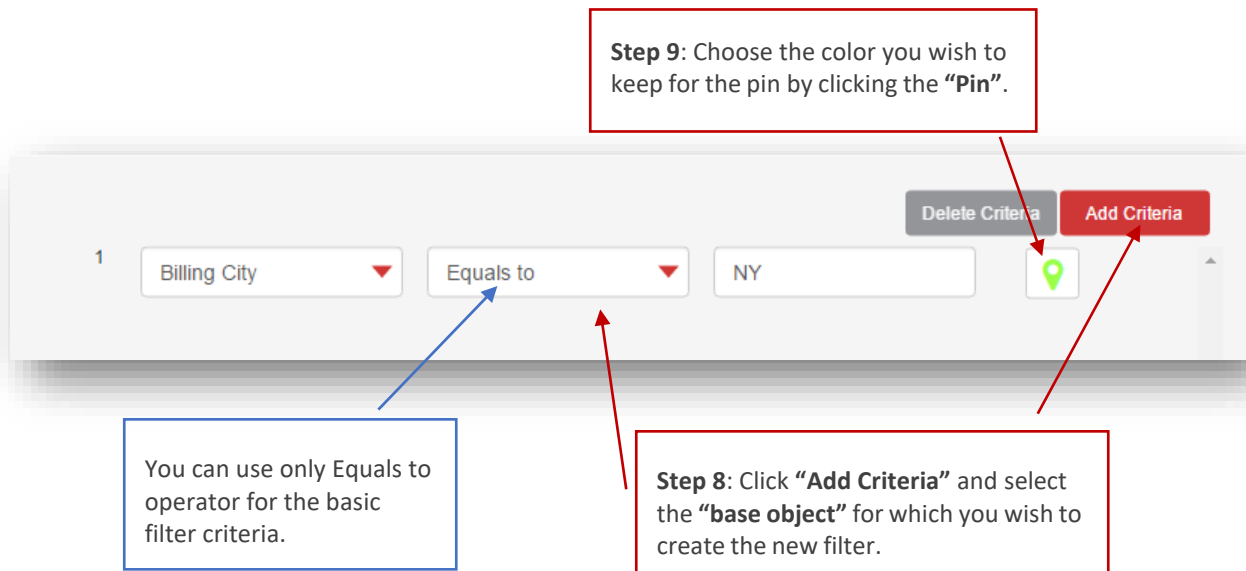
Step 3: Click on the “Create Filter” tab.

A screenshot of the 'Create Filter' form. The form has two tabs: 'Manage Filter' and 'Create Filter' (which is active). The form contains several input fields and a dropdown menu, each with a numbered step indicator:

- Step 3:** A small red box with the number '3' is located above the 'Create Filter' tab.
- Step 4:** A red box with the number '4' points to the 'Filter Name' input field, which contains the text 'Account Name and Billing Country'.
- Step 5:** A red box with the number '5' points to the 'Description' input field, which contains the text 'Colored Filter for Acc#'. A larger red box on the left side of the page also points to this field with the text 'Step 5: Provide more details for your reference in “Description”.'.
- Step 6:** A red box with the number '6' points to the 'Base Objects' input field, which contains the text 'Account'.
- Step 7:** A red box with the number '7' points to the 'Filter Type' dropdown menu, which is set to 'Colored'.

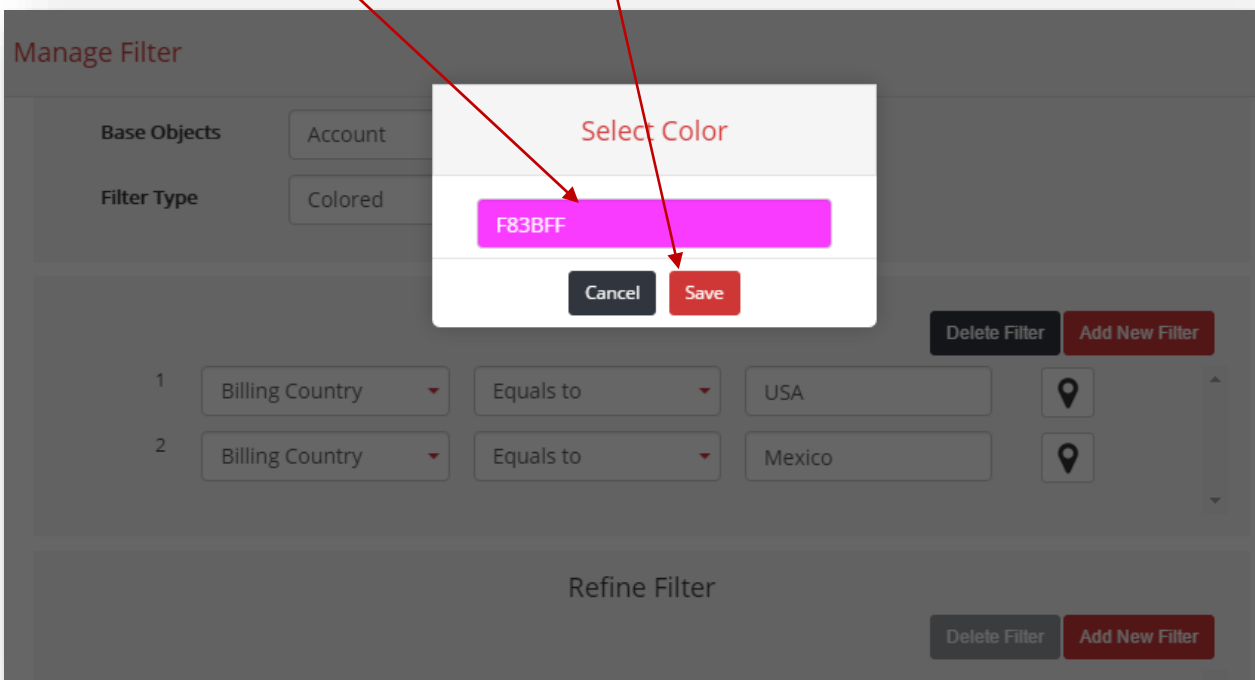
Step 6: Select the object for which you wish to create the Filter from the drop-down in “Base Objects”.

Step 7: Select “Filter Type” as Colored.



Caveat:

- You have to choose the color from the palette and click “Save”.



Note:

- You can add 10 basic filter criteria and 5 refined filter criteria for a colored filter

Refine Filter

2 Account ID Starts With A

Delete Criteria Add Criteria

Step 10: To add the “Refine Filter”, click “Add Criteria”.

Filter Logic

1 or 2 or 3 or 4 or 5 or 6 or 7 or 8 or 9 or 10

11 and 12 and 13 and 14 and 15

System automatically applies an “OR” condition (not editable) for the basic filter criteria. It applies an “AND” condition for the Refine “Filter Logic”. If the Filter Logic is edited, the system does not automatically apply the “AND” condition when the Filter is edited later.

Step 11: Click the “Save Filter” button.

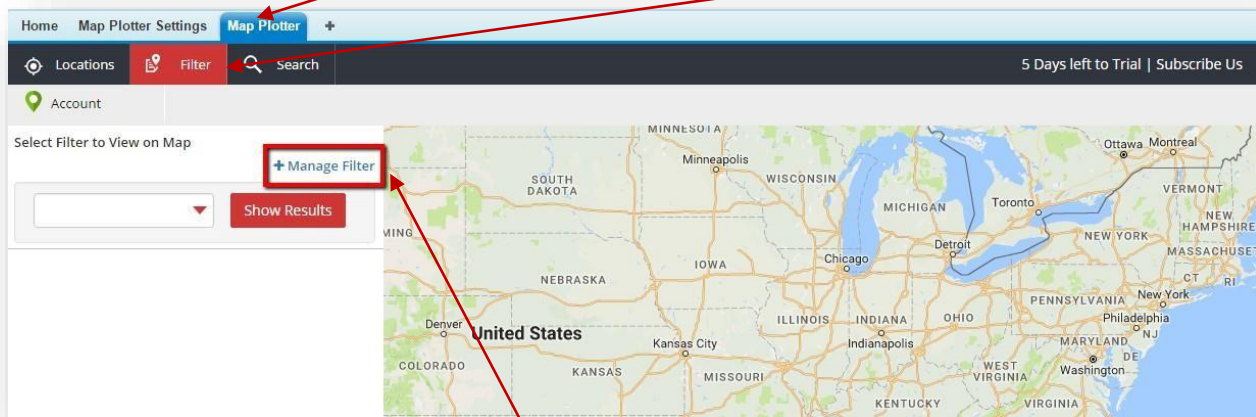
Manage Filter

Manage Filter Create Filter

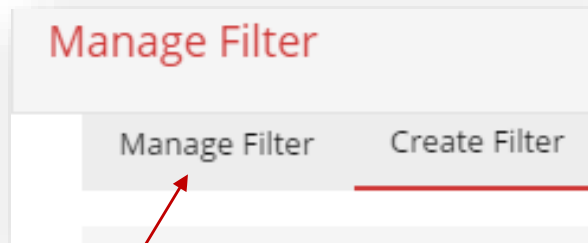
You will find the Filter in “Manage Filter tab”. You can delete , edit , or clone  a filter from this location.

Editing a Filter

Step 1: Click on “Map Plotter” tab and Click on “Filter”.



Step 2: Click on “+Manage Filter”.



Step 3: In “Manage filter” tab, click  to edit the filter criteria that you wish to change.

Step 4: Make the changes in the filter criteria and click “Save Filter”.

- Please refer to [Creating a New Filter](#) for more details on adding filter criteria and filter logic to your query

Executing a Filter

- Once you have created and saved a filter, you can execute it to pull the Data Points to plot on the map

To execute a Filter:

Step 1: Click on “Map Plotter” tab and Click on “Filter”.

Step 2: Select the “Filter”, which you wish to execute from the drop-down menu.

Step 3: Click on “Show Results”.

Step 4: A list of “Data Point Name” will be displayed, satisfying the filter criteria.

Step 5: Select the “Data Points”, which you wish to plot on map.

Step 6: You can use the “Search” option to find a specific record.

Step 7: You can also sort the listed Data Points by “Data Point Name” and “Type”.

Step 8: Click on “Plot on Map”.

Step 9: The selected Data Points will be plotted on the map.

- You can get directions between the plotted points
- Please refer to [Getting Directions in Map Plotter](#), for more details
- For further filtering the mapped Data Points you can use the draw tool, please refer to [Applying Tools on Mapped Data Points](#) for more details

Search

To view Data Points belonging to an object you can use the **“Search”** option.

- In this option, you can search a string within an object and plot the result on a map

To Search a Data Point Name

The screenshot shows the 'Map Plotter' interface with the following steps highlighted:

- Step 1:** Click on **“Map Plotter”** tab and Click on **“Search”**.
- Step 2:** Select the **“object(s)”**, for which you wish to search the data point name.
- Step 3:** Type at least 3 characters of the Data Point name and click **“Search”**.
- Step 4:** A list of **“Data Point Name”** will be displayed.
- Step 5:** You can sort the list on **“Data Point Name”** and **“Type”** by clicking **“the arrows”**.
- Step 6:** Select the **“Data Point Name”** that you wish to plot on map.
- Step 7:** Click **Plot on Map**.

The interface includes a top navigation bar with 'Home', 'Map Plotter Settings', and 'Map Plotter'. Below this is a search bar with a magnifying glass icon and a 'Search' button. A sidebar on the left shows a list of objects, including 'Account' and 'Data Point Name'. The main area displays a map of Paris with various locations marked. A table of search results is visible, listing data point names and their types.

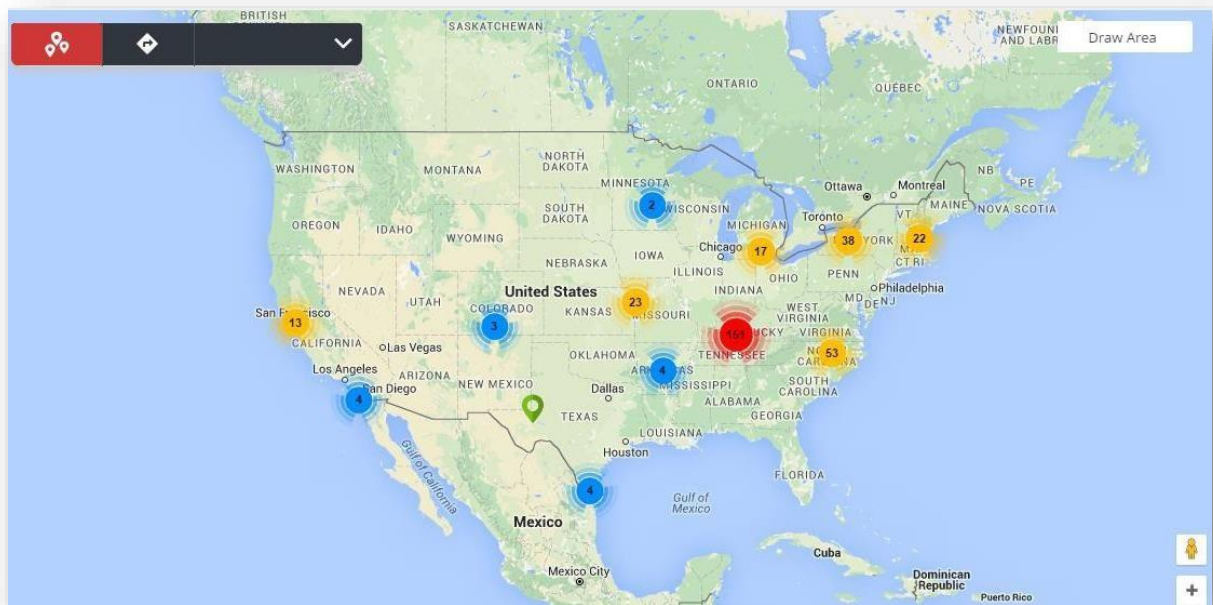
- You can get directions between the plotted points.
- Please refer to [Getting Directions in Map Plotter](#), for more details.
- For further filtering the mapped Data Points, you can use the draw tool. Please refer to [Applying tools on Mapped Data Points](#) for more details.

Applying Tools on Mapped Data Points

- Map Plotter provides you with more options to customize the results and choose the Data Points that you wish to view on the map

Clusters

- Map Plotter groups the map points on a map to ease accessibility and improve the readability
- Clusters show the concentration of points in a particular area
- Clusters are formed when the search results in more than 200 points on the map



See Also

- [Map Plotter Settings](#)
- [Viewing Map Point Information](#)

Getting Directions in Map Plotter

Map Plotter provides the ability to plot Data Points on the map and get directions between the points.

- This feature can help you to plan your day's route and execute it to your benefit
- You can choose to get the directions between two points or select a single Data Point to get directions from your current location
- You can also add destinations to your route plan
- Map Plotter can save the directions into a PDF file for future use
- You can also opt to print the map for your reference

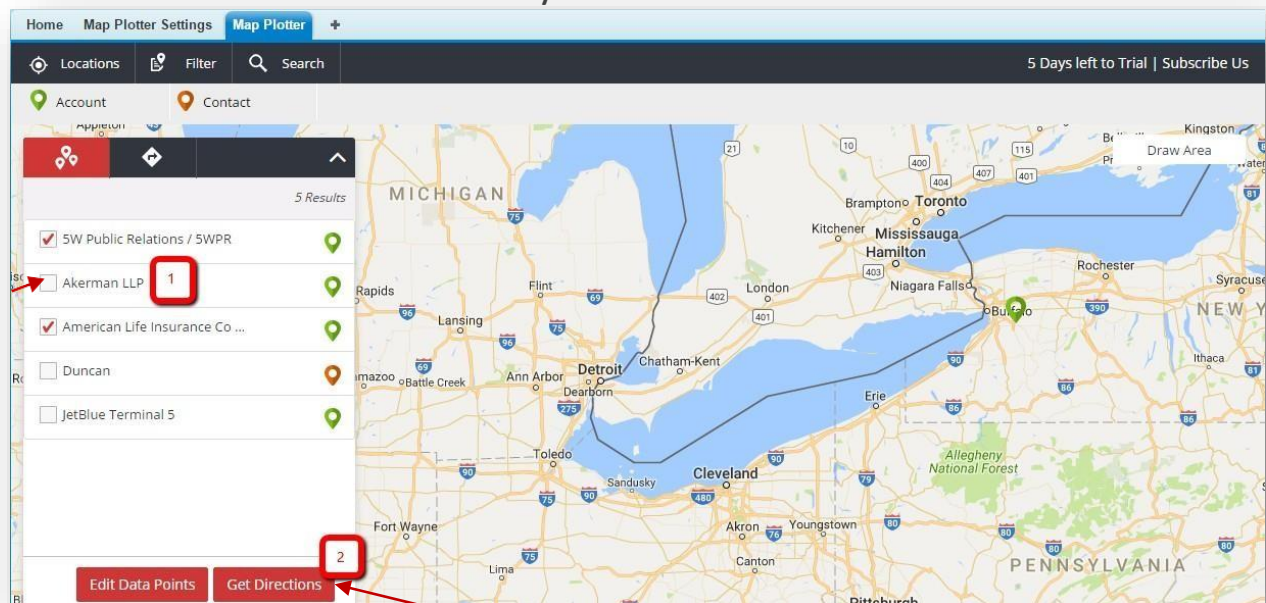
Getting Direction Between the Plotted Points

- Once the Data Points are plotted on the map, you can get the direction between any two points
- To get more details about plotting the points, please refer to [Map Plotter Tab](#)

Note:

- To get directions, at least one point must be selected

To Get Directions Between Any Two Points

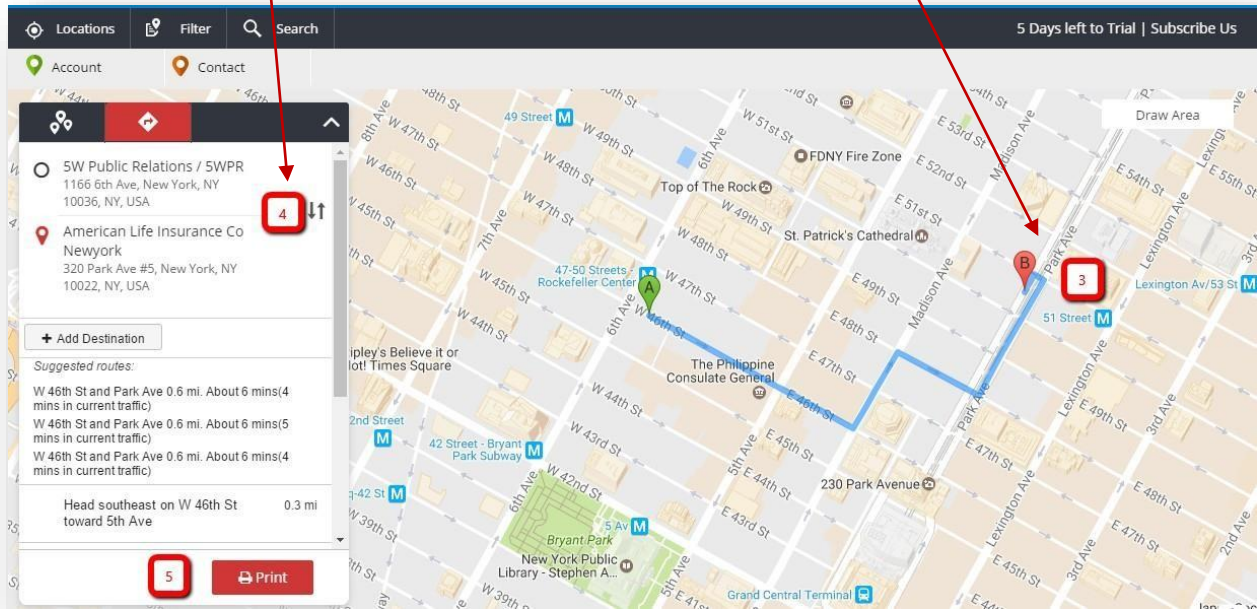


Step 1:
Select at least one "Data Point" from the list to get direction.

Step 2: Click on "Get Direction".

Step 4: You can “swap” the source and destination by clicking on the “Swap icon”.

Step 3: The Map Plotter app shows the “directions” between the “selected points”.



Step 5: Click on Print to get a hard copy of the route

- If you want to add more location(s) to get directions, please refer to [Adding Destination in Map Plotter](#)

Note:

- Using standard print selection options, you can save the directions in PDF format

Adding Destination in Map Plotter

Map Plotter provides the ability to add more than two points to get directions.

- When adding more destinations, the original destination becomes via point and the newly added point becomes the destination

Note:

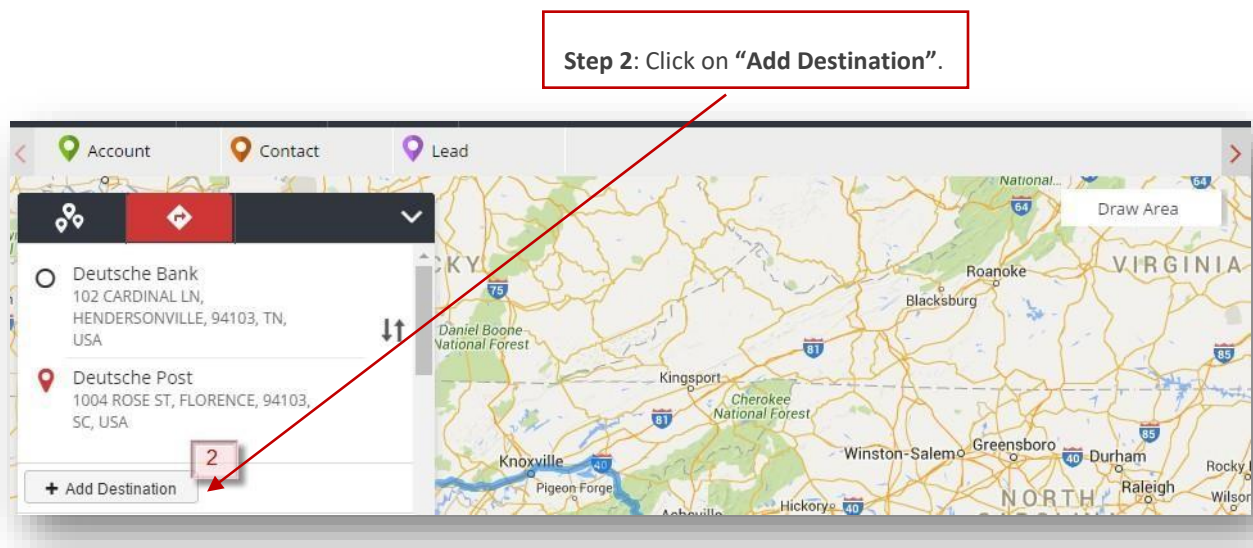
- You can add a maximum of 8 destinations to your route

To Add A New Destination

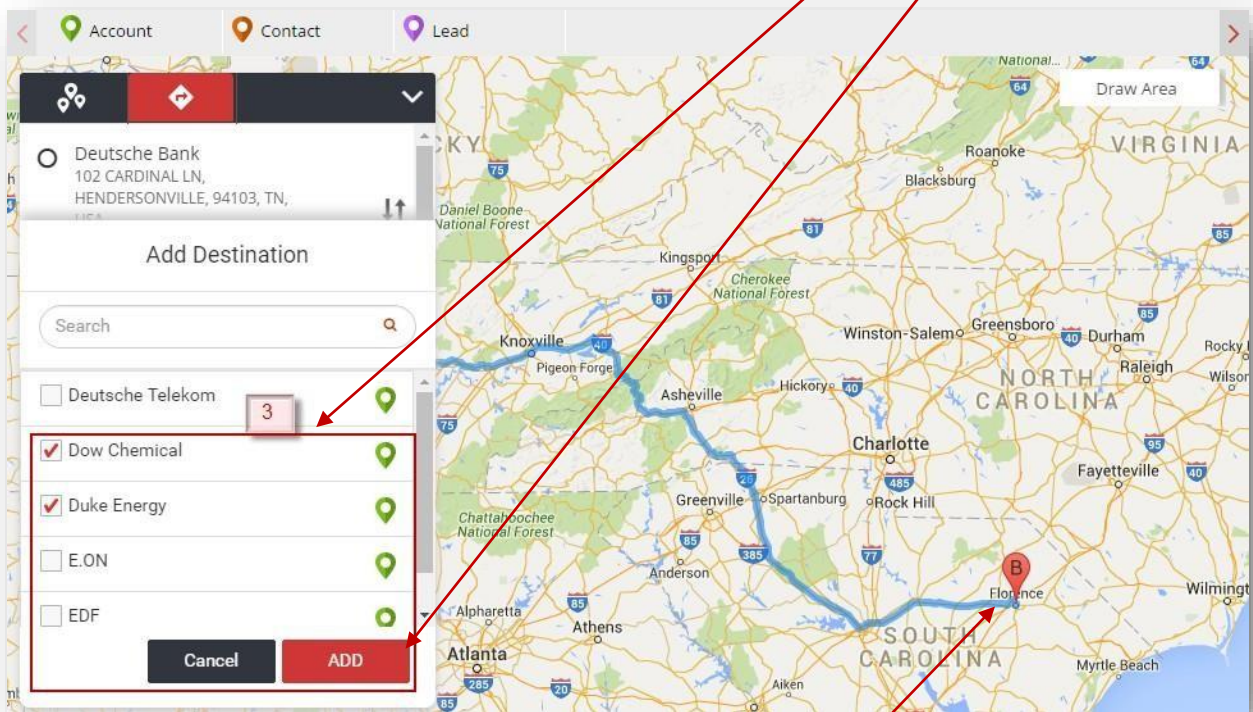
Follow these Steps:

Step 1: Plot at least two Data Points on the map and get directions.

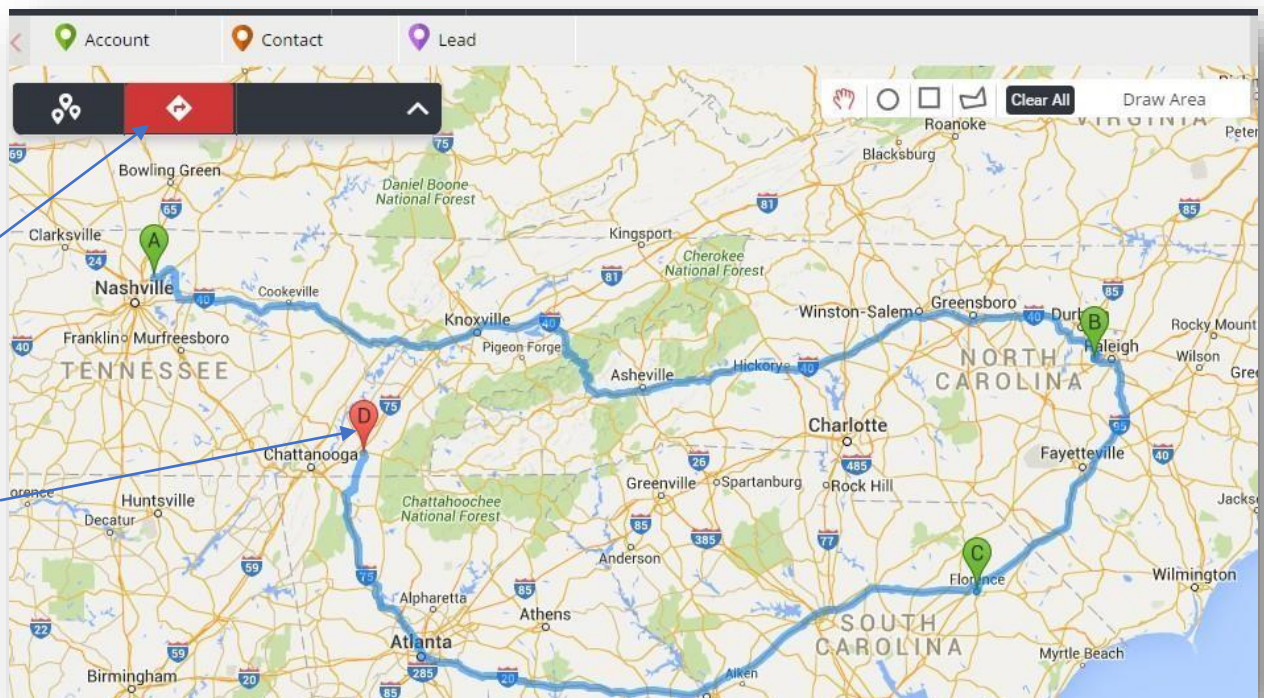
- For more details, please refer to [Getting direction between the plotted points](#)



Step 3: Select “destination(s)” from the list and click on “Add”.

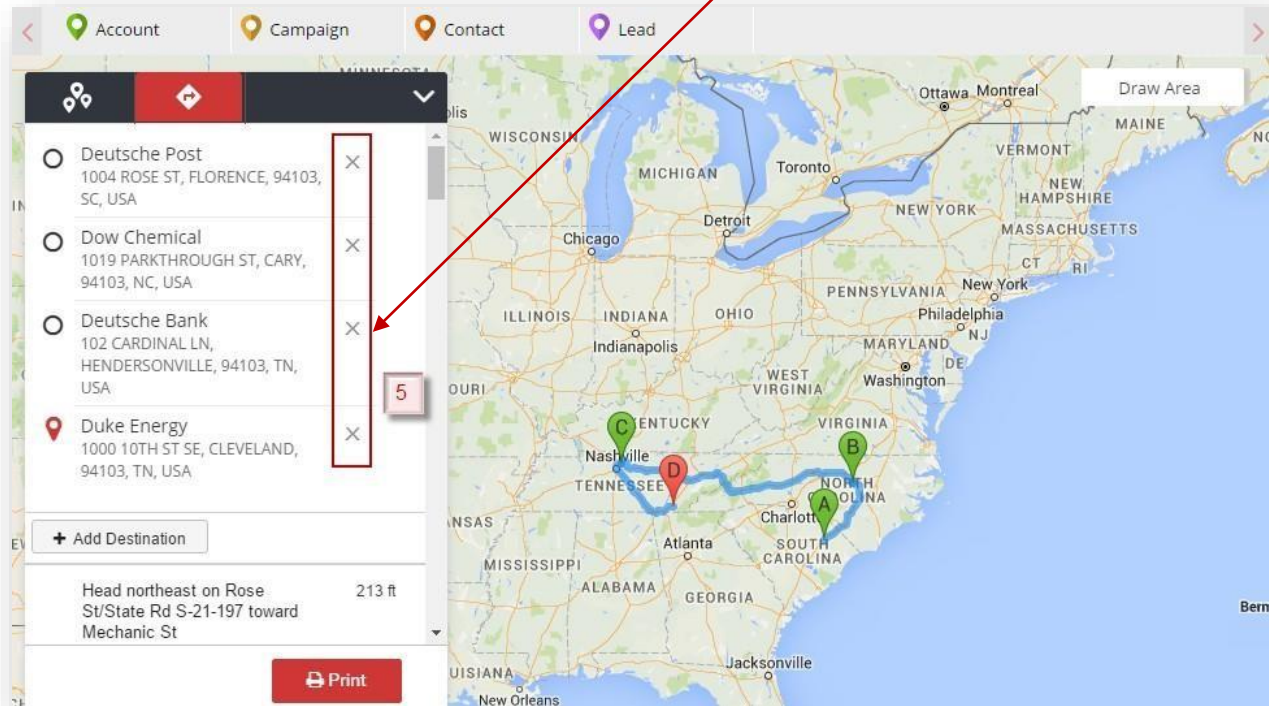


Step 4: Map Plotter will map the points and show the “directions” between the “selected points”.



you can drag and drop the “map point” from the map onto the “direction panel” to add it to the route plan.

Step 5: You can “delete” selected destinations by Clicking on “X” besides the mapped Data Points to remove it from the route.



Note:

- You can add a maximum of 8 destinations

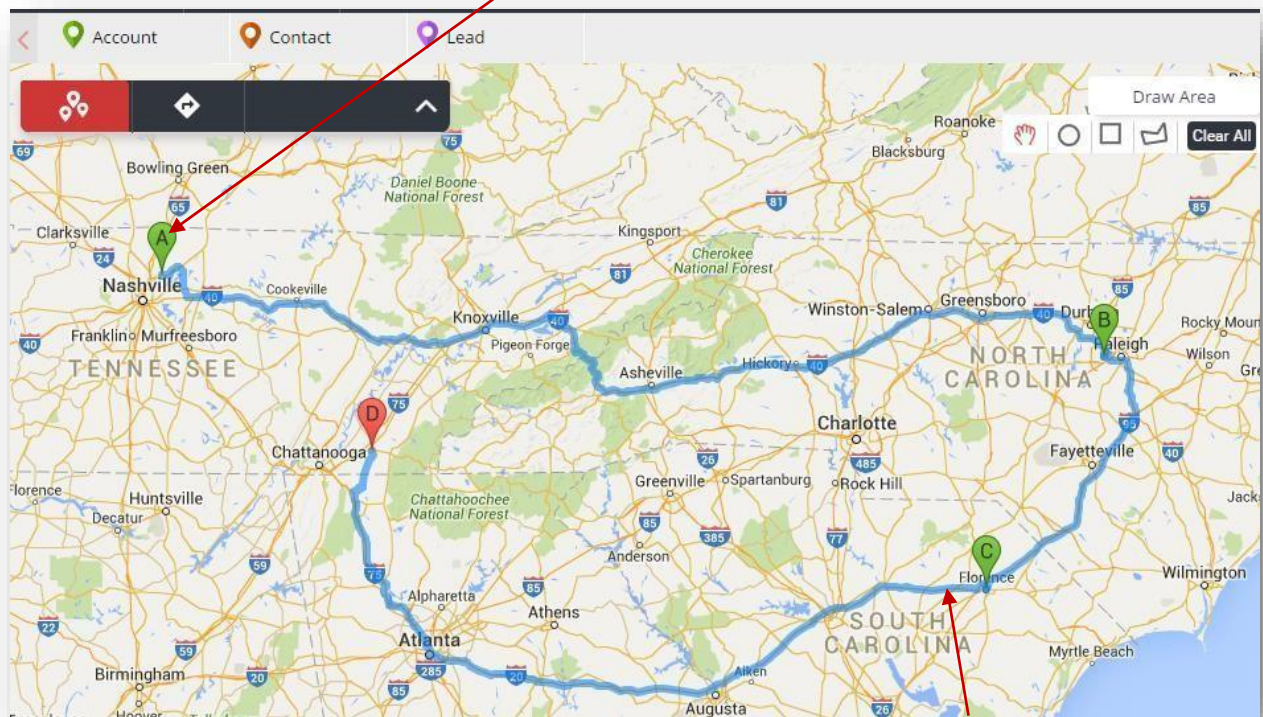
Getting Direction from Your Current Location

Map Plotter provides the ability to get directions to a Data Point from your present location.

To Get Direction From Your Current Location

Step 1: Plot the Data Point on the map. For more details, refer to [Map Plotter Tab](#).

Step 2: Select the “Data Point” that you wish to get direction to from your current location.



Step 5: Map Plotter will show you the “direction”.

Step 3: Click on “Get Direction”.

Step 4: A warning window might pop up, Click on “OK” to confirm that you want to get the route to this location from your current location.

See Also

- [Filter](#)

Viewing Map Point Information

Map Plotter provides the following information about a map point,

- 1) Salesforce information
- 2) Food/ Stay information
- 3) Nearby location information

Salesforce Information

The **“Overview”** tab in the map point window takes you to Salesforce to view the **“Overview”** of the Data point.

To View Salesforce data

Step 1: Click the Data Point, for which you wish to check the Salesforce data.

Step 2: “Info” window will be displayed.

Step 3: The first tab that you see is the **“Overview tab”**. It provides the Location Details.

Step 4: Click on the **“Header”** to check the Salesforce information.

Step 5: If you wish, you can edit the **“Salesforce record”**.

Step 6: You can view **“Data Points”** within a set radius from either your current location or the selected **“Data Point”**. For more details, refer **Nearby Location Information**.

Food/Stay Information

The **"Food/Stay"** tab shows a list of nearby places.

To View the Food/ Stay Information for a Record

The screenshot shows the Exxon Mobil app interface. A map in the background displays a location in Kansas City. An information window is open, showing the 'Food/Stay' tab. The list includes:

- Christopher Elbow Artisanal Chocolates.**
1819 McGee Street, Kansas City
- Comfort Inn & Suites Downtown.**
770 Admiral Boulevard, Kansas City
- Crayola Cafe.**
2450 Grand Boulevard #214, Kansas City
- Crowne Plaza Kansas City Downtown.**
1301 Wyandotte Street, Kansas City

Four numbered callouts provide instructions:

- Step 1:** Click the "Data Point", for which you can use to check food and stay option(s).
- Step 2:** "Info" window will be displayed.
- Step 3:** Click on "Food/Stay" tab.
- Step 4:** It will show a "list of available options". You can "scroll up and down" to check the options.

Nearby Location Information

You can find Data Points located within a defined radius of the selected Data Point on the map.

To Locate Near Data Points

Step 1: Open the “info” window of the “Data Point”. For details on how to open the info window, please refer [Viewing Map Point Information](#).

Step 2: In the “Overview” tab, select the “Radius and unit” of distance (mi or Km).

Step 3: Click on “View Data Points”.

Step 4: Map Plotter will show all the “Data Points” falling within the “set radius”.

See Also

- [Map Plotter Settings](#)
- [Map Plotter Tab](#)

Uninstalling Map Plotter

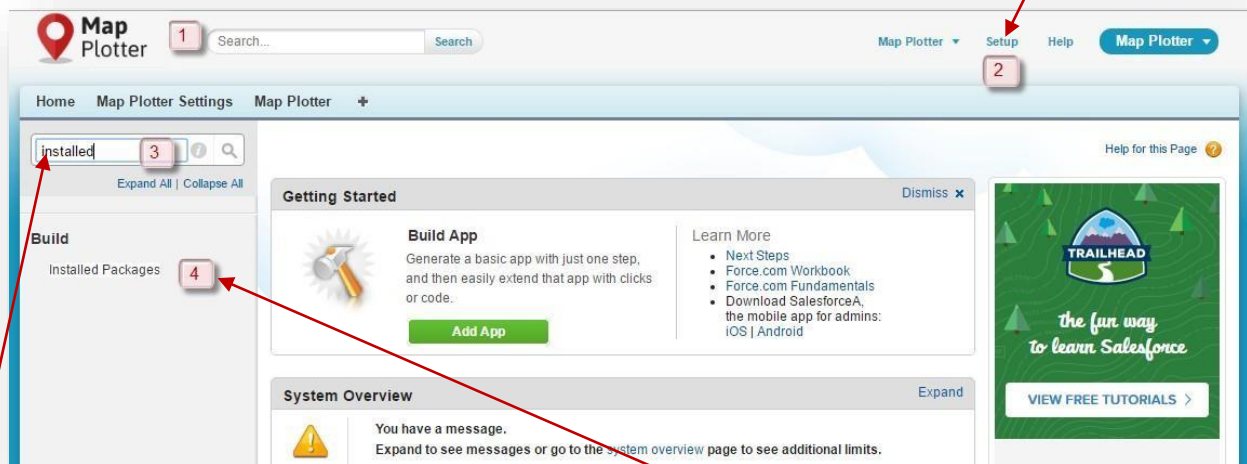
Note:

- APEX Triggers should be disabled or deleted before starting the uninstallation process
- Map Plotter Permission Sets should be unassigned from the users

To Uninstall the Map Plotter Application

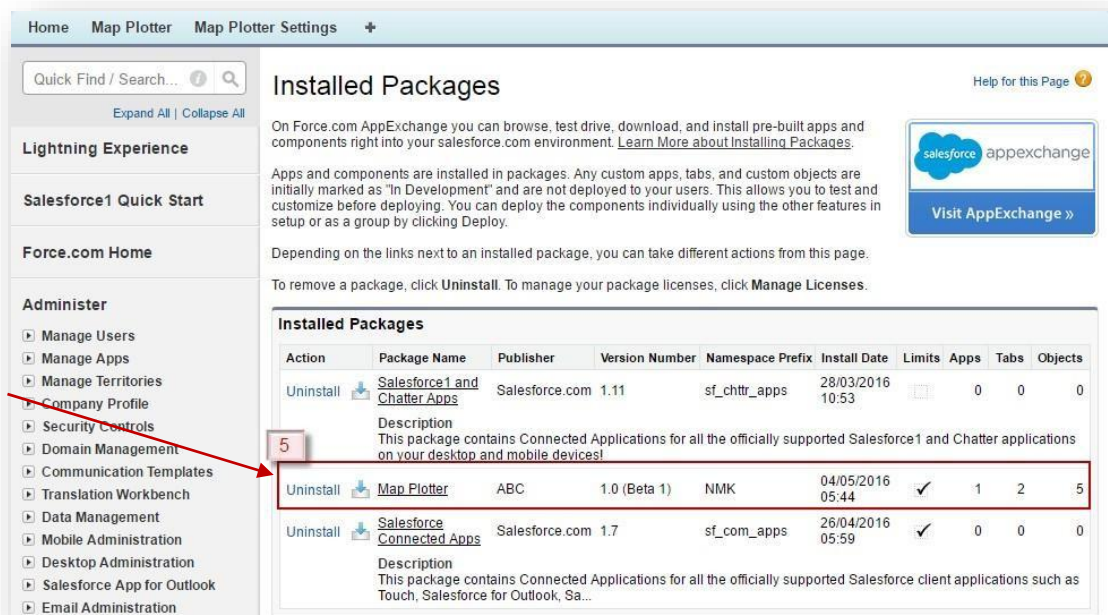
Step 1: Login into your “Salesforce org”.

Step 2: Click on “Setup”.



Step 3: In Quick find/Search look for “Installed Packages”.

Step 4: Click on “Installed Packages”.



Step 5: It will show the list of installed packages. Click “Uninstall” next to the Map Plotter package.

Step 6: It will show all “the package components, custom objects” that will be uninstalled. “Verify” all the components before proceeding.

The screenshot shows a dialog box titled "Custom Object Data". It contains a table with two columns: "Custom Object" and "Records (Approximate)". The table lists five custom objects: MP_Map_Point (633 records), SalesInfoMapSetting (5 records), MP_AddressInfo (258 records), MP_MapFilter (1 record), and MP_CustomMapping (3 records). Below the table, there are two radio button options: "Save a copy of this package's data for 48 hours after uninstall" (selected) and "Do not save a copy of this package's data after uninstall". A checkbox labeled "Yes, I want to uninstall this package and permanently delete all associated components" is checked. At the bottom left is an "Uninstall" button. A red box labeled "7" points to the radio button options, and another red box labeled "8" points to the "Uninstall" button.

Custom Object	Records (Approximate)
MP_Map_Point	633
SalesInfoMapSetting	5
MP_AddressInfo	258
MP_MapFilter	1
MP_CustomMapping	3

☒ Save a copy of this package's data for 48 hours after uninstall
☐ Do not save a copy of this package's data after uninstall

☒ Yes, I want to uninstall this package and permanently delete all associated components

Uninstall

Step 8: Click on “Uninstall”.

Step 7: Select an “appropriate option” as per your requirement.

Step 9: The Map Plotter package will be “Uninstalled”.

See Also

- [Overview](#)
- [Map Plotter Settings](#)

Troubleshooting

General Errors and Fixes

Sr. No	Error Description	Reason	Fix
1.	There are no Objects / Records / Map points listed in the list view and you see an error message saying “No Data Available” .	- Invalid API key entered - Custom objects are not mapped - Fields for the custom objects are not valid - Custom / Standard objects are not successfully geocoded	- Generate a valid API key and reenter Refer to Setting API Keys. - Map custom objects and retry. Refer to Geocoding the mapped object - Check the “custom object mapping” and make sure the fields are correct and have data Check the “geocoding reports” to make sure the objects you are looking for were geocoded successfully. The status should not be failed or pending. - Refer to Checking Geocoding Reports
2.	You do not find the custom object that you have created, to geocode.	Map Plotter is unable to search the custom object.	When creating a “custom object” select allow search in the search status. Refer to Allow Search .

3.	You get an error message “Something went wrong” when trying to execute a Filter.	1. A comma is used in the currency field while creating a Filter 2. The date format used in the query criteria is not correct 3. Special characters are used in the query	1. Check the “Filter” that you are trying to execute. Make sure that no Commas are used in the currency field Example: Use “100000” instead of 1,00,000 2. Verify that the date format used for queries is “YYYY-MM-DD” 3. Make sure there are no special characters used in the queries
4.	You are unable to geocode object(s) using Map Plotter.	1. You may have exceeded the Daily Quota, that you can geocode 2. Mapped fields may not be of the right data type	1. Open “Google API Manager” from Map Plotter Settings. Check the Usage. It might have exceeded the Daily Quote available to you. If this is the case, you can wait for the quota to be refreshed... For more details, please refer to Setting API Keys 2. Verify that the “datatype” used for the mapping fields is a string
5.	In the Safari browser, Map Plotter is unable to retrieve data.	Map Plotter does not have access to cookies and website data.	Correct the “Safari browser” settings to always allow access to cookies and website data. For more information, please refer to Safari Specific Browser Settings .

Error Messages and Description

Sr. No	Error Message	Fix
1.	Invalid Google API key. Please verify the key and try again.	Check the "Google API key" that you have entered. Make sure that it is valid and re-enter.
2.	Select at least one object to save.	Select "=Object" to map fields and then click Save.
3.	Please select Entity Name.	Select "Entity Name" and then click "Save" .
4.	Please select City Name.	Select "City Name" and then click "Save" .
5.	Please select Street Name.	Select "Street Name" and then click "Save" .
6.	Please select State Name.	Select "State Name" and then click "Save" .
7.	Please select Country Name.	Select "Country Name" and then click "Save" .
8.	Please select Postal Code.	Select "Postal Code" and then click "Save" .

9.	This field has already been selected.	Make sure that the “Map Field” that you are selecting is not selected already.
10.	You have already added Ten Custom Objects.	Map Plotter allows a maximum of 10 objects to be mapped. Verify and clean up the “objects” that you have mapped.
11.	Are you sure? Custom mapping for Group will be deleted.	This is a “confirmation message” to make sure that you want to delete the mapping. If not, click outside the information box.
12.	No Data Found	You are trying to find “records in the object(s)” which are not geocoded. Check and start geocoding from the Setup Custom Mapping tab for the object that you are trying to view the result for.
13.	Select at least one City to continue.	This is an “Alert message” . In the Select Location, window select at least one city before clicking “next” .
14.	Select a source and a destination.	In the Map Plotter tab, select at least two “Data Points” before clicking “Get Direction” .
15.	Do you want to get the route to this location from your location?	This is an “alert message” . If you want to get directions to the selected Data Point from your current location, click “OK” .
16.	Directions Not Available.	If google maps are unable to find the direction between the selected Data Points this message will be displayed. Verify the selected “Data Points” and then click “Get Direction” .

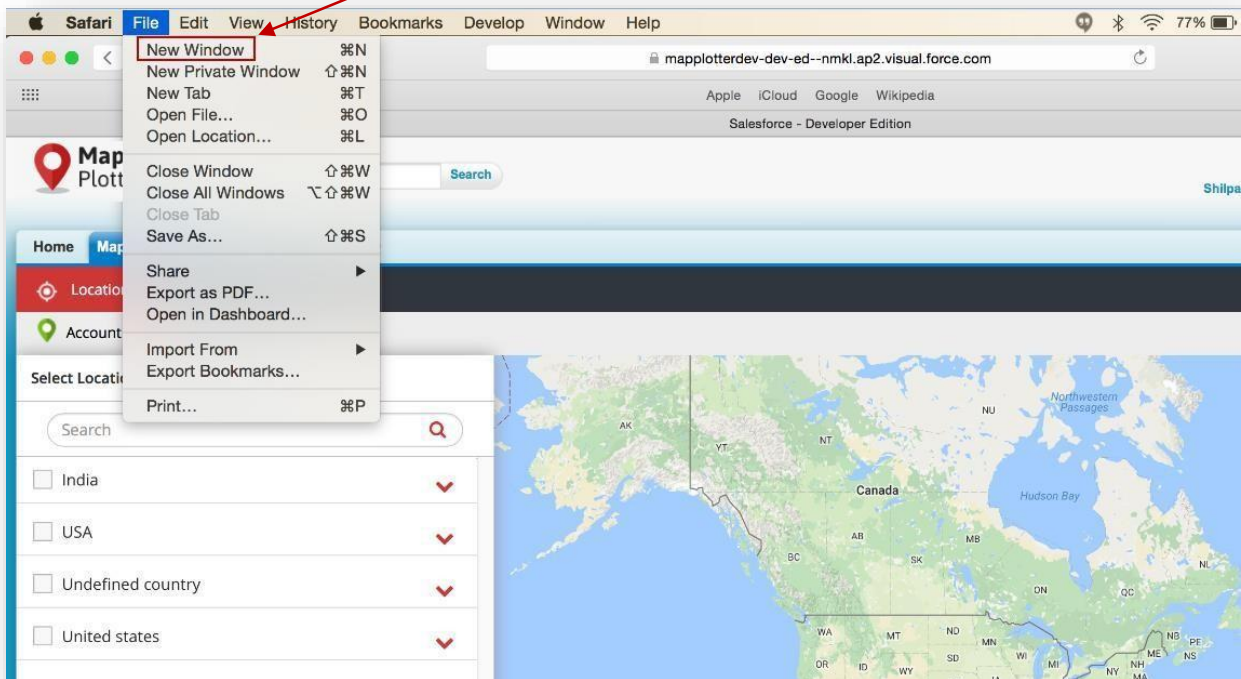
17.	Select a point as a new destination to continue.	From the “Add Destination” list select at least one Data Point and then click “Add” .
18.	You can add only 8 destinations.	You have reached the maximum limit of destinations that can be added. Verify and remove a few “Data Points” before adding a “new destination” .
19.	The maximum number of destinations has been reached.	You have reached the maximum limit of destinations that can be added. Verify and remove a few “Data Points” before adding a “new destination” .
20.	Please Enter Name.	Check the “Query Name” field. Give a uniquely identifiable name before clicking “Save Filter” .
21.	Enter a valid radius.	In the map info window, enter the value of the radius and unit before clicking “View Data Points” .
22.	No Objects Mapped.	Add Objects from the “Map Plotter Settings” tab before going to the “Map Plotter” tab.
23.	No objects added.	Add objects from the “Setup Custom Mapping” tab and then go to the “Reports” tab.

24.	No data available	Add objects from the “Setup Custom Mapping” tab, geocode the object, and then go to the “Reports” tab.
25.	Geocoding in Process. Check after some time.	Geocoding for the object has started, and the results will be available in some time. Wait for a couple of minutes before “checking” again.
26.	Select at least one Custom Object to continue.	In the “Search” tab select at least one object before clicking search.
27.	Enter a keyword.	In the “Search” tab enter at least 1 search character before clicking search.
28.	Enter a valid search term.	In the “Search” tab do not enter special characters in the search field. Only characters are allowed.
29.	No results found.	In the “Search” tab select successfully geocoded object(s) to search Data Point.
30.	No records matching query condition.	Verify the plot “filter criteria” that you are trying to execute. Check the “filter conditions” and “filter logic” to make sure that you have valid records.
31.	Local Storage not available.	Map Plotter is unable to access your local storage. Verify that the “Safari browser” is opened in Normal Mode. “Do not open” it as New Private Window.

Safari-Specific Browser Settings

It is very important to check the following settings before using Map Plotter in Safari:

Step 1: Open the “Safari browser” in Normal Mode.



Cookies and website data: ☐ Always block
☐ Allow from current website only
☐ Allow from websites I visit
☒ Always allow

Remove All Website Data...

Step 2: Use the following “Safari settings” in Preferences.

How to Bypass a Trigger

1. Open the custom setting MapPlotterTriggerSettings (Extentia_SIM_MapPlotterTriggerSettings__c) and click on **"Manage"**
2. Enter the following two custom settings for **"Bypass Contact Trigger"** and **"Bypass Account Trigger"** and mark the **"Bypass Trigger"** field as checked
3. If you are working with custom objects, for the Name field in the custom setting for that object, you need to add **"Bypass ObjectName Trigger"** and the Object Name must be without **"_c"**. E.g.: **"Bypass Employee Trigger"**. Where Employee is a custom object

Custom Setting
MapPlotterTriggerSettings

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

View: **All** [Edit](#) [Create New View](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

Action	Name ↑	Bypass_Trigger
Edit Del	Bypass Account Trigger	☒
Edit Del	Bypass Contact Trigger	☐

If you **"Bypass the trigger"**, new records added to Salesforce will not be geocoded immediately. They will be geocoded in the daily batch that runs once a day.

Device and Browser Requirements for Map Plotter

Browser	Version	Platform	Resolution
IE	11+/Edge	Desktop (Windows)	Any
Chrome	43+	Desktop (Windows)	Any
Firefox	32+	Desktop (Windows)	Any
Safari	6.0/8,0	Desktop (Windows)	Any
iPhone4 – Default Safari Browser/Good Access	Mobile Safari 6.0	iOS 8.2	640 * 960 (Landscape and Portrait)
iPhone5 – Default Safari Browser	Mobile Safari 6.0	iOS 8.2	640 * 1136 (Landscape and Portrait)
iPhone6/6+ – Default Safari Browser	Mobile Safari 6.0	iOS 8.2	750 * 1334 (Landscape and Portrait)
iPad mini			
iPad3 - Default Safari browser	Mobile Safari 6.0	iOS 8.2	2048 * 1536 (Landscape and Portrait)
Android Phones - Google Chrome	4.4 and above	Android Phone	1. Xlarge screens are at least 960dp x 720dp 2. Large screens are at least 640dp x 480dp 3. Normal screens are at least 470dp x 320dp 4. Small screens are at least 426dp x 320dp

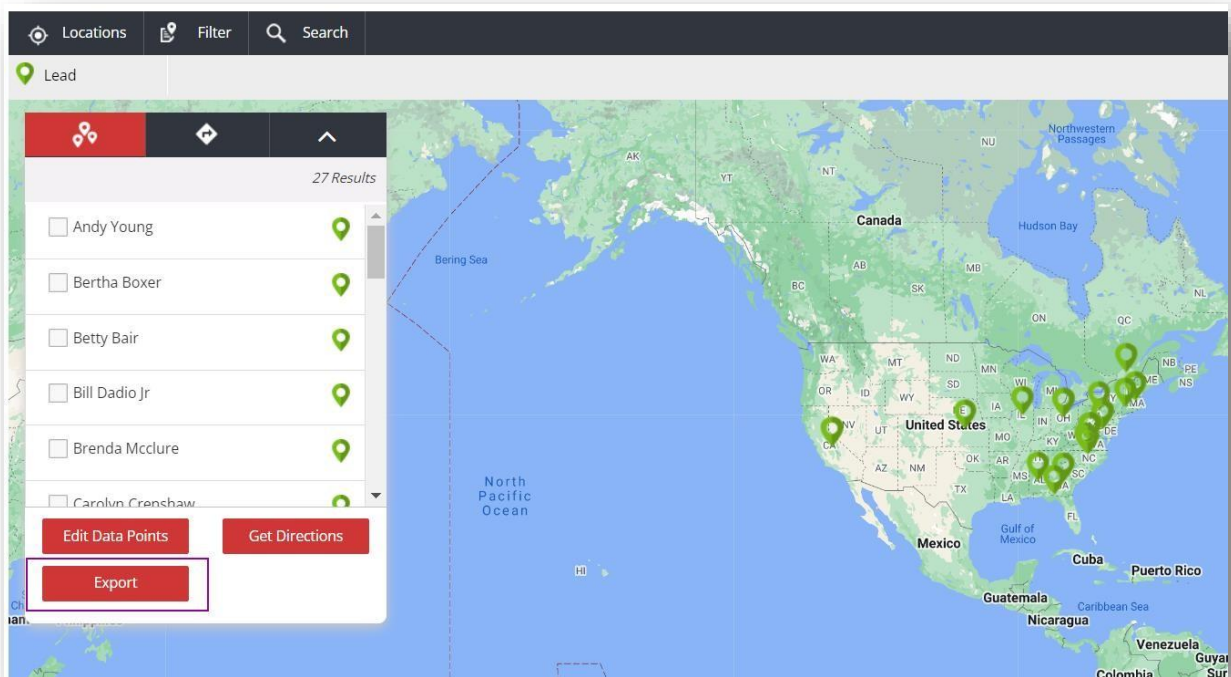
Android Tablets - Good Access	4.4 and above	Android Tablet	1024 * 600/1280*800 (Landscape and Portrait) – Samsung Tab2
Nokia Lumia 1020 and HTC 8X phones - Microsoft Internet Explorer 11	Windows 8.1 update	Windows Phone	1. 480 × 800 2. 768 × 1280 3. 720 × 1280 4. 1080 x 1920
BlackBerry Z10 phones - BlackBerry Browser	BlackBerry OS 10.2 or later		
BlackBerry Z30 phones	BlackBerry OS 10.2.1.3175 or later		

New Features

Disable Export Button for the Mapped Data Points



- By default export button is enabled to all the users. However, to disable the Export Button for certain users. System Admins can add the user profile name in the Custom Setting as shown below
- Custom Setting name: **Export&MUEnabler (Export_MUEnabler_c)**



Filter Accessibility by Other Users

- The System Admin can use the permission set “No Other User Filters Permission” to restrict users to access other users filters

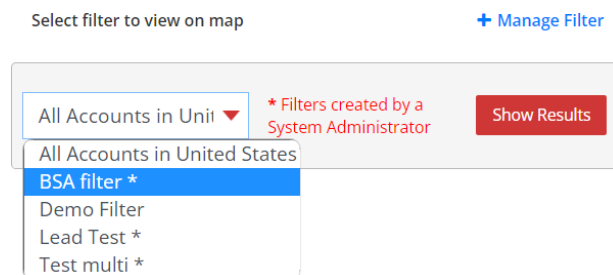
Export Filter Button on the Filter Tab

To use this feature for Account, Contact, and Lead Object.

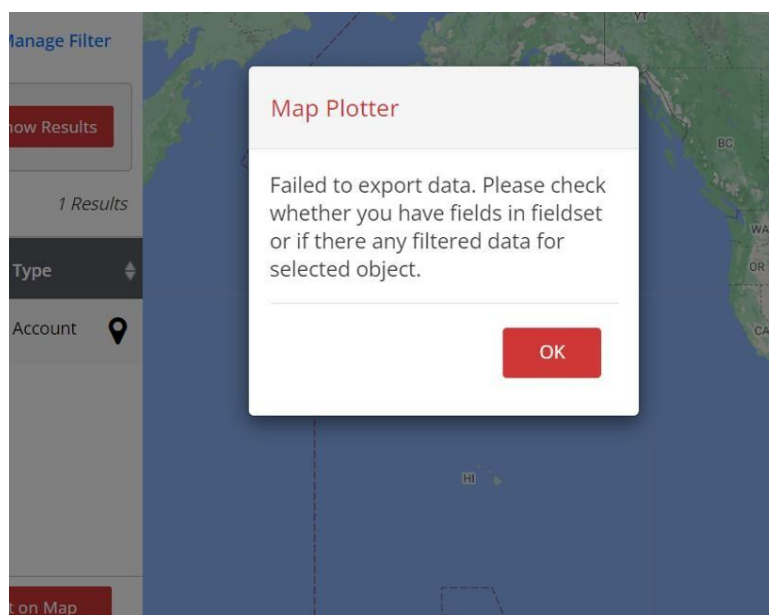
- The System Admin can create a Field Set that can be used to create the Excel Sheet that contains the exported Filter Data
- When a System Admin create/edit a filter the Fields Set get automatically created in the respective object as the same name as the filter name.

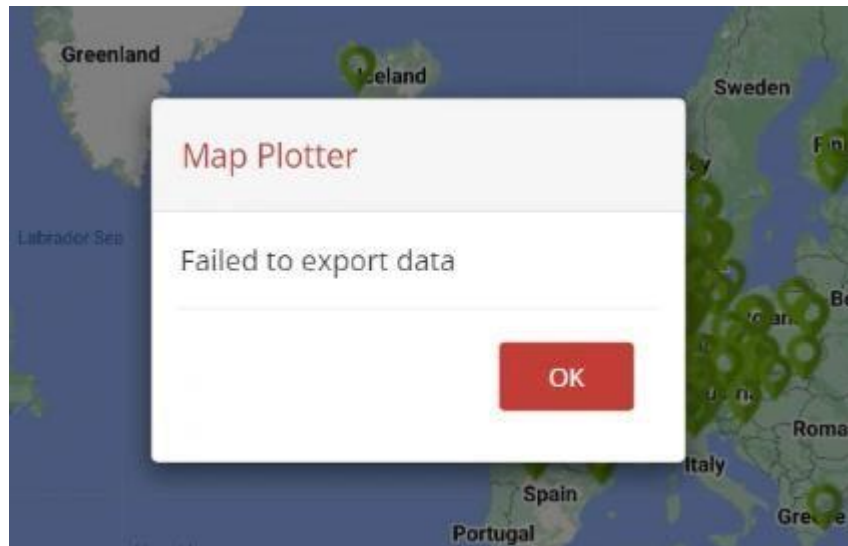
Note: Do not use anything special character, coma, hifhen etc. in between words other then Space and underscore to name a filter.

- The filters created by system admins will have an asterisk (*) in the suffix.



- If there is no default filter available in the object user will get these error.





- To rectify the error. Please follow the this steps.

Step 1: Open the “Salesforce” Org and go to “Setup”.

Step 2: Click on the “Object Manager”.

Step 3: Search for any of these objects “(Account, Contact, and Lead)” for which you see the error on the screen when exporting the Filter data.

Step 4: Click on “Field Set”.

Step 5: Click on the “New” button.

Note: Use the below information to create the “Field Set”.

- Field Set Label – **ExportFilteredList**
- Field Set Name - **ExportFilteredList**
- Where is this used? - **Export field set fields on click of export**

Step 6: Open the Field Set and add the required fields that needs to be exported.

Step 7: Click on “OK”.

Field Set Label

Field Set Name

Namespace Prefix

Where is this used?