



mango

MAPS

Your Data Plotter

Mango Map

User Manual

Version 1.5

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1. Introduction

This User Manual (UM) provides the information necessary for System Admin to effectively use the Mango Map.

1.1 Overview

The purpose of Mango Map is to enhance the visual representation and tracking of business data within Salesforce. It addresses the need for a more intuitive and interactive way to analyze and understand records by presenting them on a map. This tool aims to provide a holistic view of the business by offering both a map-based visualization and a list view with filtering capabilities.

Key Features or Major Functions Performed by Mango Map:

- **Map Visualization:** Displays Salesforce standard and custom object records on a map using map markers.
- **List-View:** Provides a list-view of records for easy searching and filtering based on various criteria.
- **Record Detail Page:** Allows users to click on map markers or list-view items to access detailed record information directly in Salesforce.
- **Configuration Tab:** Enables administrators (using the Mango Map Admin permission set) to control access to custom and standard objects for mapping purposes.
- **Different Color Map Markers:** Available specifically for the Opportunity object, using colors based on Opportunity stages to visually represent different stages on the map.

Architecture of the system in non-technical terms

Mango Map is integrated within the Salesforce platform and operates as a web-based application. It leverages Salesforce's cloud infrastructure for data storage and processing. Users access Mango Map through their web browsers within Salesforce's user interface (UI).

System environment or special conditions

Mango Map operates entirely within the Salesforce environment, utilizing Salesforce's cloud architecture. It requires stable internet connectivity for real-time data visualization and interaction. Users must have appropriate permissions assigned via the Mango Map Admin to access and utilize Mango Map functionalities effectively within their Salesforce org.

2. Getting Started

Welcome to Mango Map, your tool for visualizing Salesforce data on a map! This guide will walk you through the steps to install, configure, and use Mango Map effectively within your Salesforce organization.

2.1 Set-up Considerations

Before you begin using Mango Map, ensure you have the following set-up considerations in place:

- **Equipment and Network Configuration:**
Mango Map operates within Salesforce's cloud environment and requires a standard desktop or laptop with a web browser (Chrome, Firefox, Safari, etc.). Ensure stable internet connectivity for real-time data interaction and visualization.

2.2 User Access Considerations

Mango Map provides different levels of access based on **Permission Sets**, we have two permission sets:

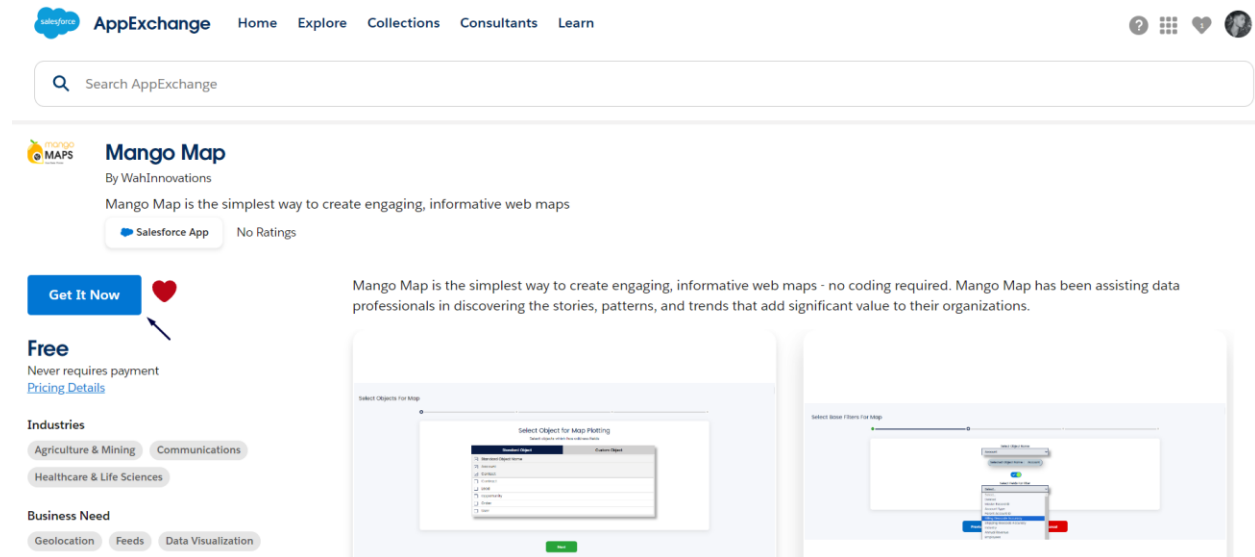
- **Mango Map Admin:**
 - Can access both Mango Map Configuration Tab and Mango Map Main Tab.
 - Responsible for configuring object access and settings within Mango Map.
- **Mango Map User:**
 - Can access the Mango Map Main Tab only.
 - Utilizes map visualization and list-view functionalities without configuration capabilities.

2.3 Accessing the System

Follow these steps to get started with Mango Map:

2.3.1 Install Mango Map

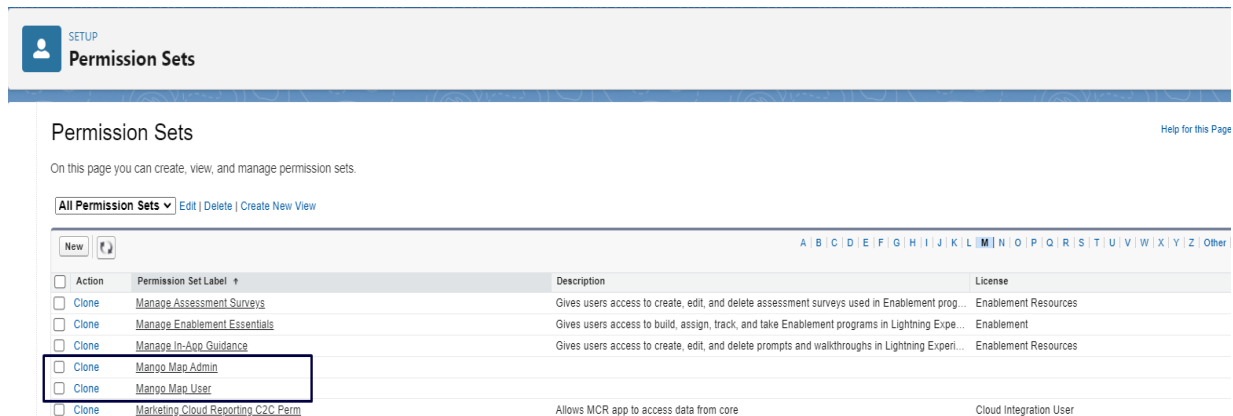
- Log in to your Salesforce Org and navigate to Salesforce AppExchange.
- Search for "Mango Map", click on "Get It Now", and follow the installation prompts.



The screenshot shows the Salesforce AppExchange interface. At the top, there's a navigation bar with 'AppExchange', 'Home', 'Explore', 'Collections', 'Consultants', and 'Learn'. Below this is a search bar. The main content area displays the 'Mango Map' app by 'WahInnovations'. It includes a 'Get It Now' button, a 'Free' badge, and a description: 'Mango Map is the simplest way to create engaging, informative web maps'. There are also filters for 'Industries' (Agriculture & Mining, Communications, Healthcare & Life Sciences) and 'Business Need' (Geolocation, Feeds, Data Visualization). Two preview images show the app's interface for selecting objects and styles for mapping.

2.3.2 Assign Permission Sets (Mango Map Admin Only) :

- After installation, assign the "Mango Map Admin" permission set to System administrator.
- Assign the "Mango Map User" permission set to other users who need access.

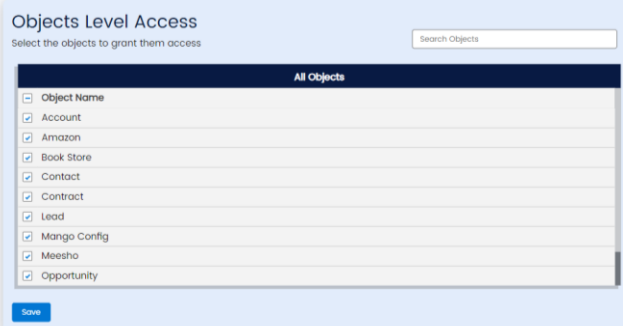


The screenshot shows the Salesforce Setup page for 'Permission Sets'. The page has a header with 'SETUP' and 'Permission Sets'. Below this, there's a section titled 'Permission Sets' with a description: 'On this page you can create, view, and manage permission sets.' There are links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'. A table lists the permission sets, with 'Mango Map Admin' and 'Mango Map User' highlighted by a red box. The table has columns for 'Action', 'Permission Set Label', 'Description', and 'License'.

Action	Permission Set Label	Description	License
☐ Clone	Manage Assessment Surveys	Gives users access to create, edit, and delete assessment surveys used in Enablement prog...	Enablement Resources
☐ Clone	Manage Enablement Essentials	Gives users access to build, assign, track, and take Enablement programs in Lightning Expe...	Enablement
☐ Clone	Manage In-App Guidance	Gives users access to create, edit, and delete prompts and walkthroughs in Lightning Experi...	Enablement Resources
☐ Clone	Mango Map Admin		
☐ Clone	Mango Map User		
☐ Clone	Marketing Cloud Reporting C2C Perm	Allows MCR app to access data from core	Cloud Integration User

2.3.3 Configure Objects (Mango Map Admin Only):

- Access the Mango Map configuration tab to configure access to custom and standard objects.



Object Name	Account
Account	☒
Amazon	☒
Book Store	☒
Contact	☒
Contract	☒
Lead	☒
Mango Config	☒
Meesho	☒
Opportunity	☒

2.4 System Organization & Navigation

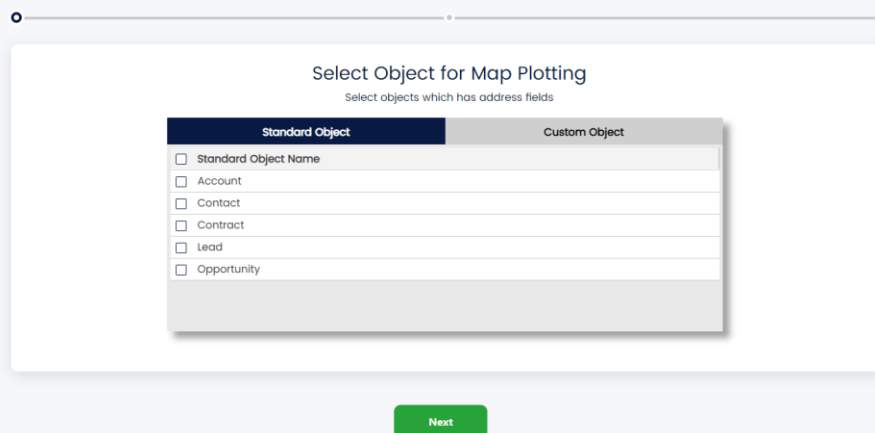
After configuring access to custom and standard objects on the Mango Map Configuration Tab, proceed with the following steps:

2.4.1 For Standard Objects

Navigate to Mango Map Component Page:

- Access the Mango Map Main Page from the Salesforce App Launcher or directly from the navigation menu.
- Here, you will set up which objects records you want to visualize on the map.

Select Objects For Map



Standard Object	Custom Object
Standard Object Name	☐
Account	☒
Contact	☒
Contract	☒
Lead	☒
Opportunity	☒

Select Objects for Visualization:

- On the Mango Map Main Page, select the objects from the data-table whose records you want to see on the map.
- Click on "Next" to proceed to the next step.

Select Objects For Map

Select Object for Map Plotting

Select objects which has address fields

Standard Object	Custom Object
☐ Standard Object Name	
☒ Account	
☒ Contact	
☐ Contract	
☒ Lead	
☒ Opportunity	

Next

Choose Primary Object:

- On the next page, you will see a picklist of objects that you previously selected on the data-table.
- Select one primary object from this picklist. Only records of this object will be displayed on the map.

Select Base Filters For Map

Select Object Name

Select

Select

Account

Contact

Lead

Opportunity

Previous Next Cancel

Enable Filters (Optional):

- If you enable the toggle button next to the object picklist, additional filters will appear.

Select Base Filters For Map

Progress bar: 1 of 3 steps

Select Object Name

Account

Selected Object Name : Account

☐

Previous Next Cancel

- Filters allow you to refine which records are displayed on the map. For example, you can filter by Created Date.

Select Base Filters For Map

Progress bar: 1 of 3 steps

Select Object Name

Account

Selected Object Name : Account

☒

Select Fields For Filter

Select...

Deleted

Master Record ID

Account Type

Parent Account ID

Billing Geocode Accuracy

Shipping Geocode Accuracy

Industry

Annual Revenue

Employees

Ownership

Account Rating

Created Date

Last Modified By ID

Last Modified Date

Previous Next Cancel

- Enter the "From" and "To" dates to filter records created within that date range.

Select Base Filters For Map

Progress bar: 1 of 3 steps

Select Object Name

Account

Selected Object Name : Account

☒

Select Fields For Filter

Created Date

DateTime Fields

Created Date

From Date

Date

01-Apr-2024

Time

5:02 pm

To Date

Date

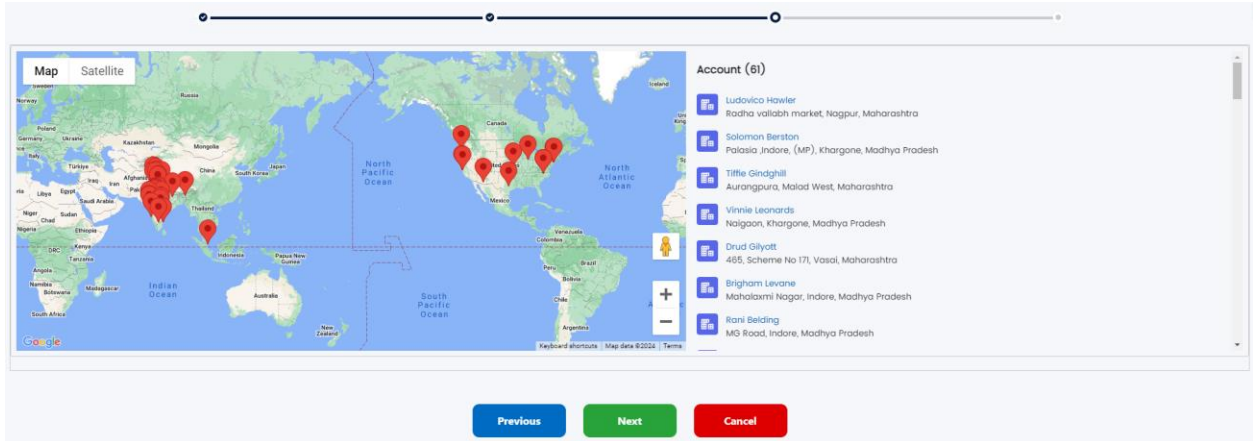
10-Jun-2024

Time

5:02 pm

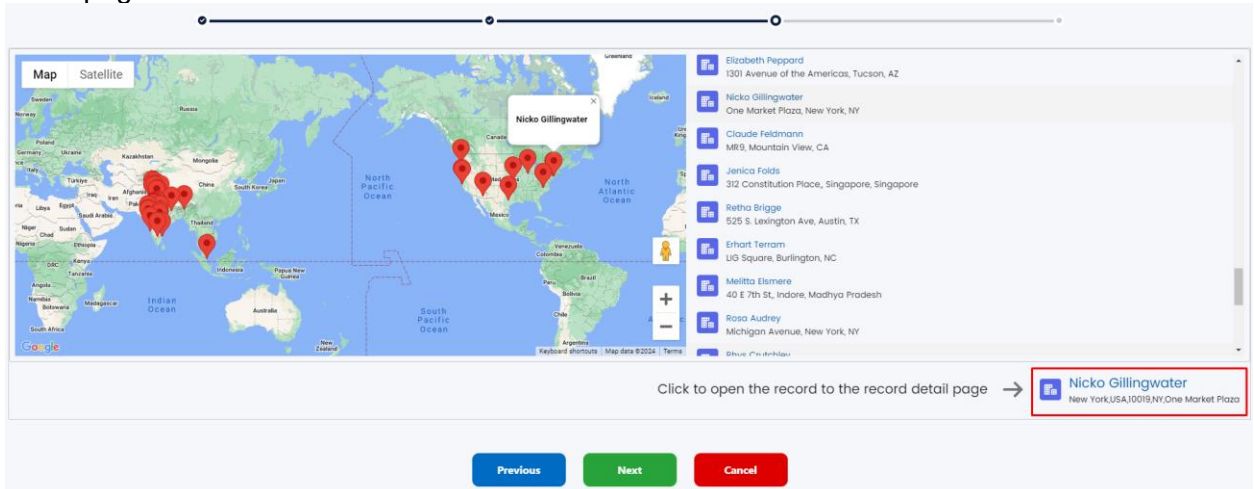
View Records on Map and List-View:

- After setting up filters (if enabled) or clicking "Next" without enabling filters, all records of the selected object will be displayed on the map as map markers.
- Simultaneously, these records will also appear in the list-view.



Interacting with Records:

- Click on any map marker to view a redirect link of the record.
- Click on a record in the list-view to open a redirect link that leads directly to the record detail page in Salesforce.



2.4.2 For Custom Objects

Follow these three steps same as standard objects

- Navigate to Mango Map Main Page
- Select objects for visualization.
- Choose the primary object as described above.

Map Address Fields for Custom Objects:

- Once the primary object is selected, a button labeled "Map Address Fields" will appear below.

Select Base Filters For Map

● ————— ○ ————— ● ————— ● —————

Select Object Name

Amazon

Selected Object Name : Amazon__c

Map Address Fields

☐

- Click on "Map Address Fields" to open a modal with options:
 - String Data Type Address Fields:** "Click Here" to map string data type address fields.
 - Address Data Type Address Fields:** "Click Here" to map address data type address fields.

Map Address Fields

Select fields type for mapping

String Fields

Click below for mapping existing address fields of your object, if that is in String datatype.Ex:-

City Los Angeles

Click Here

Address Fields

Click below for mapping existing address fields of your object, if that is in Address datatype. Ex:- Billing Address.

Billing Address

Aurangpura Khargone, Madhya Pradesh 451001 India

Click Here

- Click on the appropriate button based on the address field type in your custom object.

Map Address Fields

Select fields type for mapping

String Fields

Click below for mapping existing address fields of your object, if that is in String datatype.Ex:-

City Los Angeles

Click Here

Address Fields

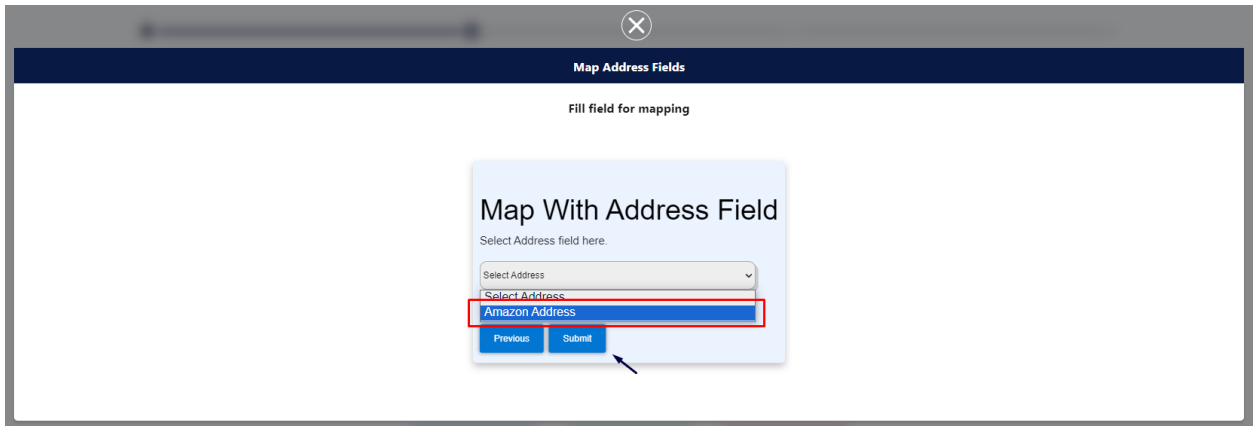
Click below for mapping existing address fields of your object, if that is in Address datatype. Ex:- Billing Address.

Billing Address

Aurangpura Khargone, Madhya Pradesh 451001 India

Click Here

- In the modal, select the address field from the picklist and submit.



Map Address Fields

Fill field for mapping

Map With Address Field

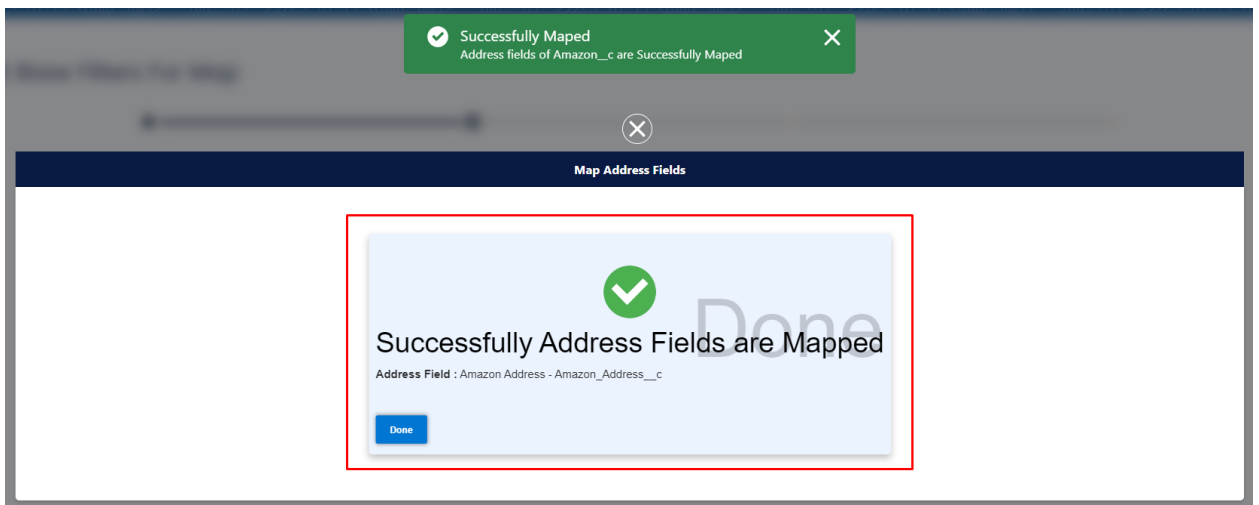
Select Address field here.

Select Address

Amazon Address

Previous Submit

- You will receive a success message once the custom object's address fields are mapped. Now, Click on **Done** to proceed.



Successfully Mapped
Address fields of Amazon__c are Successfully Mapped

Map Address Fields

Successfully Address Fields are Mapped

Address Field : Amazon Address - Amazon_Address__c

Done

Continue or Follow the Steps as You Did for Standard Objects:

- Enable Filters (Optional),
- View Records on Map and List-View
- Interact with Records as per the steps outlined for standard objects

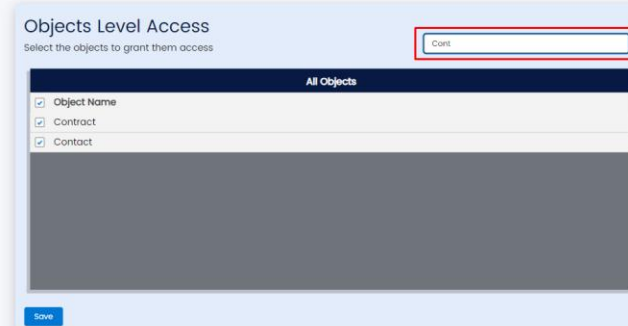
3. What's new in this release?

In this release, we have introduced several new features to enhance the functionality and usability of Mango Map: **Search Box in Configuration Tab** and **Record Redirect Functionality**.

3.1 Search Box in Configuration Tab

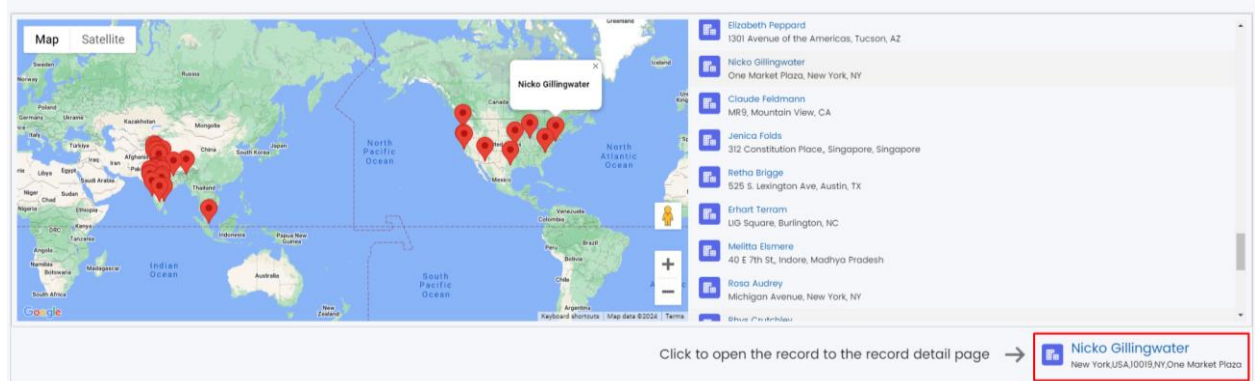
- We have added a new search box in the Configuration Tab of Mango Map. This feature allows users to easily search for Salesforce objects by their name. This is particularly useful when there are numerous objects configured within the system, making it quicker to locate and select specific objects for mapping and visualization.

Mango Map Configuration



3.2 Record Redirect Functionality

- Previously, users could not redirect a record to the record detail page in Salesforce. With this release, we have added the functionality to seamlessly navigate directly from a summary view (such as map marker or list-view entry) to the record detail page in Salesforce.



4. Troubleshooting & Support

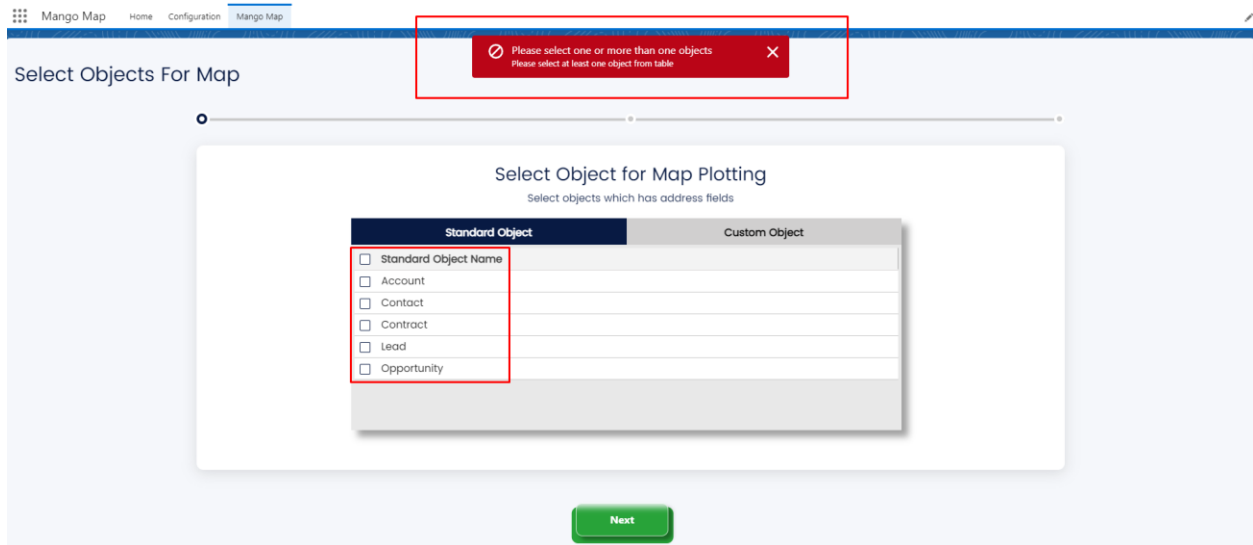
Here you will find guidance on resolving common issues and accessing support for Mango Map, ensuring smooth setup and operation.

4.1 Error & Warning Messages

4.1.1 Issues User/System Admin can resolve

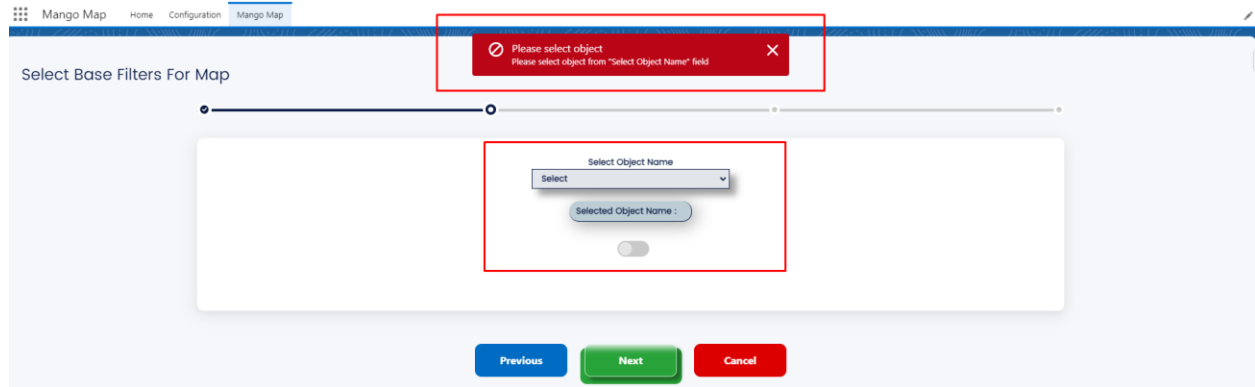
Error Message: "Please select one or more than one object."

- **Probable Cause(s):**
 - User did not select any Salesforce objects on the first screen.
- **Possible Corrective Actions:**
 - Navigate back to the first screen and select at least one object.
 - Ensure all mandatory fields are filled before proceeding.



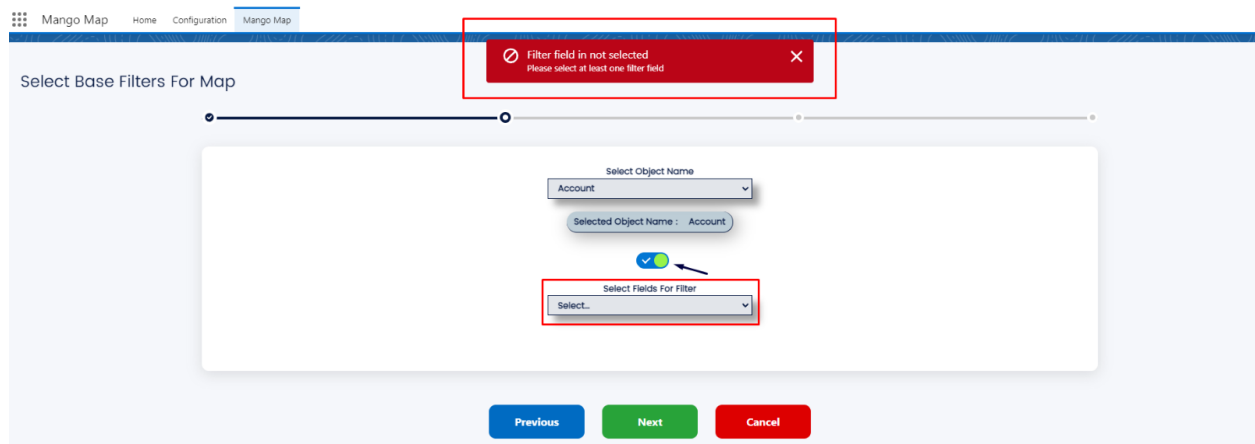
Error Message: "Please select Object."

- **Probable Cause(s):**
 - User did not select any object on the second screen.
- **Possible Corrective Actions:**
 - Return to the second screen and select an object.
 - Ensure all required fields are completed to continue.



Error Message: "Filter field is not selected."

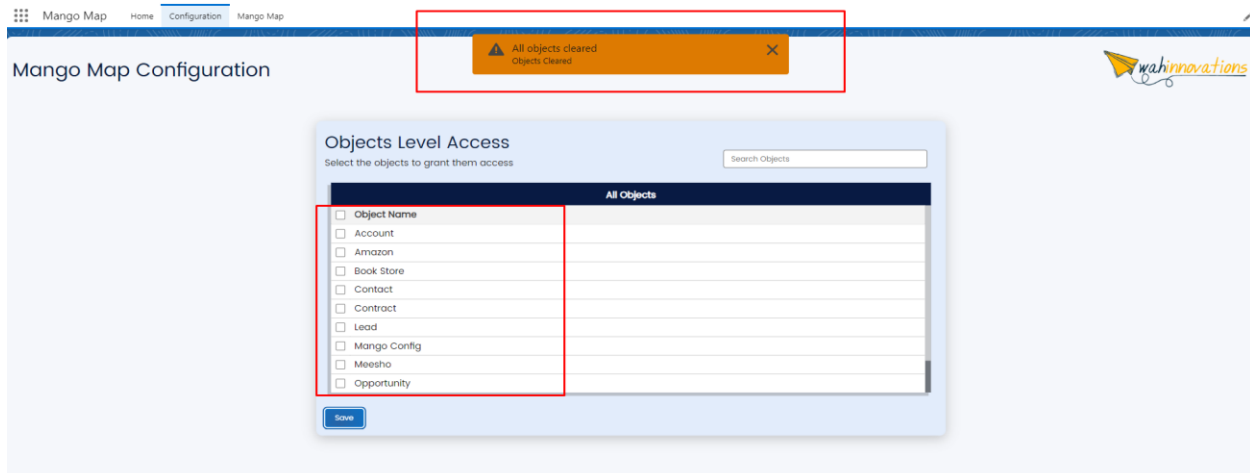
- **Probable Causes:**
 - If the user enabled the filtration toggle button and did not select any of the filters.
- **Possible Corrective Actions:**
 - If the user enabled the filtration toggle button, then they must select filter.
 - Or if you don't want to filter the records then disable the toggle button.



4.1.2 Issues only System Admin can resolve

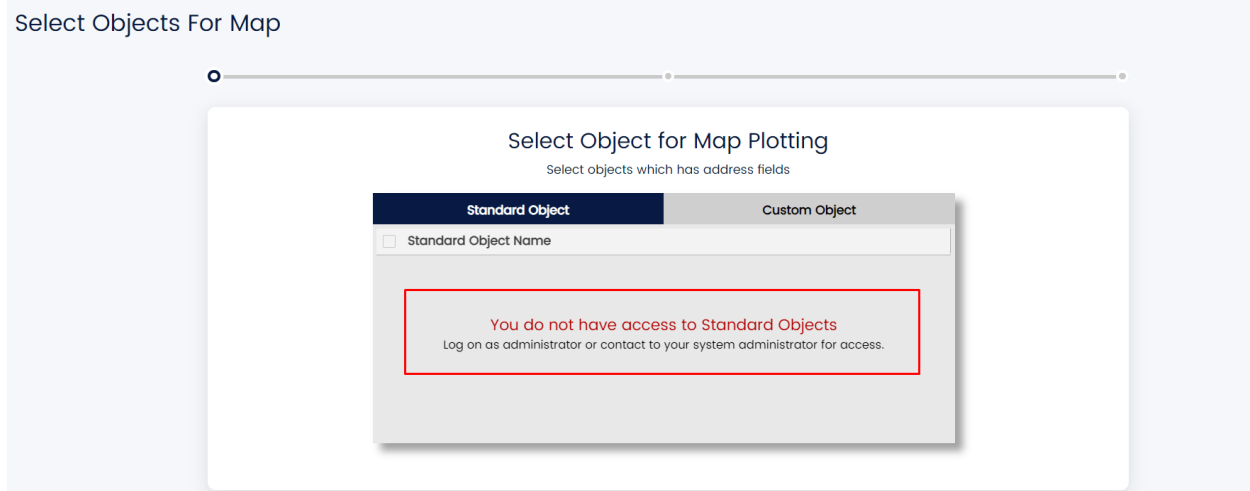
Warning Message: "All Objects cleared."

- **Probable Cause(s):**
 - User deselected all objects in the configuration tab.
- **Possible Corrective Actions:**
 - Review and reselect the necessary objects in the configuration tab.



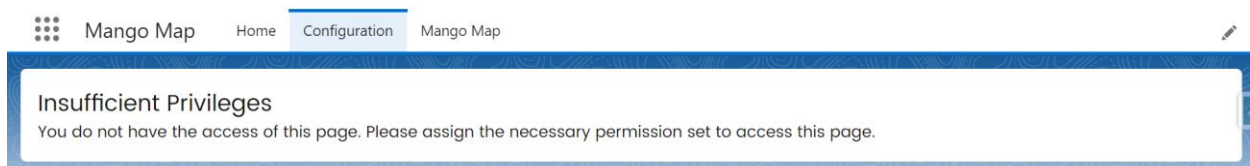
Error Message: "You do not have access to Standard/Custom Objects."

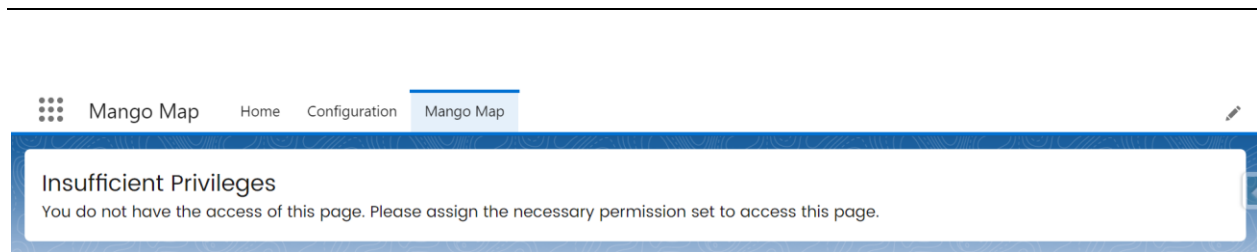
- **Probable Cause(s):**
 - Objects were not selected or configured correctly on the configuration tab.
 - Insufficient permissions to access selected objects.
- **Possible Corrective Actions:**
 - Check configuration tab to ensure objects are selected and configured properly.
 - Contact the administrator to verify permissions and access settings.



Error Message: "Insufficient Privileges."

- **Probable Cause(s):**
 - Permissions have not been granted to the admin or user.
- **Possible Corrective Actions:**
 - Grant necessary permission sets to the administrator or user.





4.2 Special Considerations

- **Address Field Requirements:** Ensure all records have filled address fields to appear on the map; records without address details will not be visible.

For Example: -

- **Custom Object Mapping:** For custom objects, map text or address data type fields properly to enable display on the map component.
- **Configuration Dependency:** Properly configure objects and permissions in the configuration tab to ensure seamless integration with Mango Map.
- **User Guidance:** Provide clear instructions and training on selecting objects and configuring permissions to avoid errors during setup and usage.

4.3 Support

For further assistance or troubleshooting with Mango Map, please contact our dedicated support team:

Contact Name	Organization	Email
Mango Map Support Team	WahInnovations	info@wahinnovations.com