

Customer Compass Documentation



For Customer Compass Version 1.31

2013/10/16

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1. Overview

Customer Compass (hereinafter referred to as “CCMap”) is simple and easy Mapping system for SalesForce platform.

You can use SalesForce “View” functionality and “Report” to filter records.

You can also easily add Task/Event by clicking icons on Map.

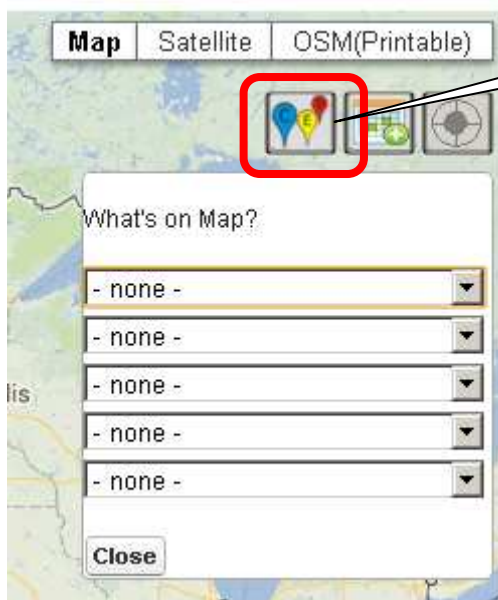
You can try CCMap only in three steps!

1. Install Customer Compass From AppExchange Market
2. Set latitude/longitude on SObject. Geocoding functionality may help.
(Refer [section 3](#) and [section 4](#) for detail)
3. Show records on Map.

Please enjoy easy mapping experience!

2. Basic functionalities

1. Select Dataset



Dataset Icon.

You can choose dataset from

- All data within map area
(Refer [section 11](#) for detail)
- Filtered data by Salesforce View
(Refer [section 12](#) for detail)
- Filtered data by Salesforce Report
(Refer [section 13](#) for detail)

2. Activity Adding Mode



Activity Add Mode

Once you show some icon on CCMAP, you can use “Activity Add Mode”.

In this mode, you can add “Item” by clicking on icon. Clicked records are added on list

Once you selected Items, you can add them as new Event or Task by buttons. Once activity is created, activity page will be opened, and you can adjust your activities.

For more detail, please refer [section 14](#)

3. Go to current position

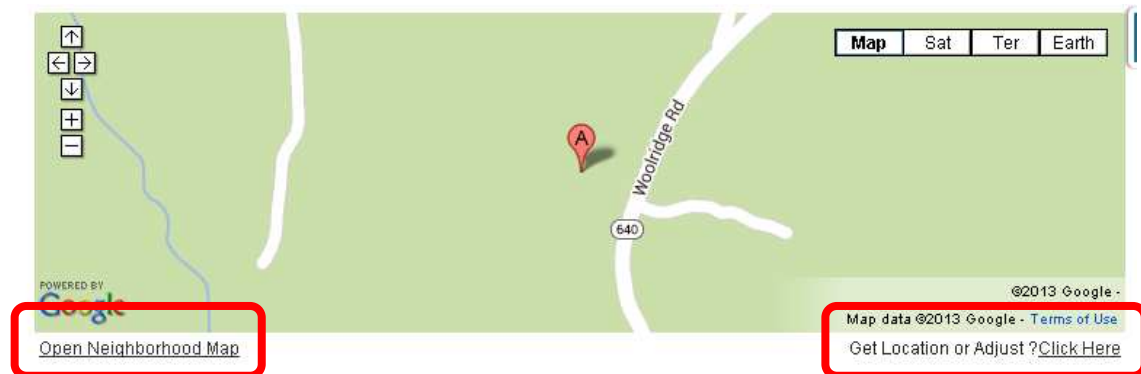


Go to current position

If you use with handy device like iPad® or any browser which enable HTML5 Geolocation capability, you can use this icon to set map center to your current position.

In detail page, you can add small map.

You can put small map in detail page. Please refer [section 5](#) for setup.



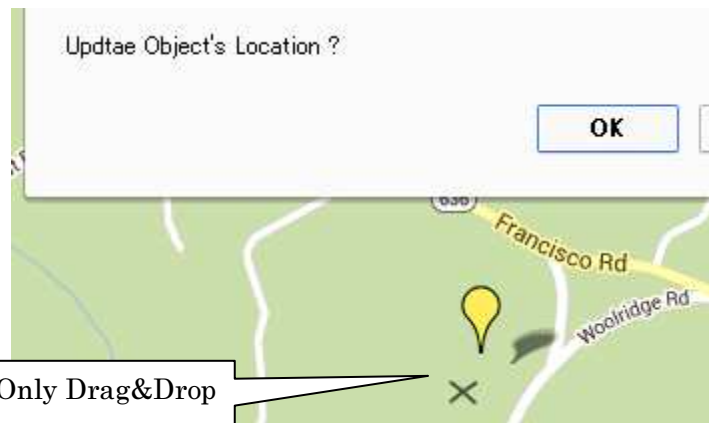
This small map is not CCMaP. This is GoogleMaps with location of this record.

To open CCMaP to see neighborhood records, click bottom-left link, then CCMaP will open in new window.

Correction Mode

When record does not have geolocation information (latitude and longitude), or location is incorrect and you want to correct it, click bottom-right link, then CCMaP will open with “Correction Mode”.

In “Correction” mode, CCMaP will try geocoding by address, and then icon is Drag Droppable. You may move icon to correct location. It automatically updates location data.



Only Drag&Drop
To adjust

3. Latitude/Longitude fields (CCLatitude__c, CCLongitude__c)

You need to set valid latitude and longitude values in **CCLatitude__c** and **CCLongitude__c** fields to display icon on CCMaP.

These fields are mandatory for CCMaP system.

You may use Geocoding functionality to set values based on address. (See [section 4](#))

In case you already use other field for geographic location, use insert/update trigger or field update to set latitude/longitude to **CCLatitude__c** and **CCLongitude__c**.

Important:

CCMaP can have only **one set of latitude/longitude for one record**. If SObject have multiple addresses or location, you should choose which location s used to display on CCMaP.

Important:

Latitude/Longitude is in **WGS84 datum** which is used for GPS system. If you use latitude/longitude in other datum system, location may be wrong place

Latitude/Longitude should be a **decimal degree format** only.

No support for Degree-Minute-Second format.

Example:

Latitude North 35.00000 degree → 35.00000

Longitude West 34.00000 degree → -34.00000

4. Geocoding from Address (CCAddress__c)

'Geocoding' is to convert Address into geographic coordinates (latitude/longitude).

Due to limitation of GoogleMaps' license, CCMAP provide free geocoding maximum 50000 records in 24 hours.

CCMAP use following fields as default.

- BillingCountry, BillingState, BillingCity, and BillingStreet for Account
- MailingCountry, MailingState, MailingCity, and MailingStreet for Contact
- Country, State, City, and Street for Lead

If you use above address, you don't need to add custom field. If you need to use other address, you may add custom field CCAddress__c as text field or expression field to contain address for geocoding.

CCAddress__c is mandatory if you want to use geocoding functionality.



Geocoding will be run on record with following condition

- CCAddress__c is not empty or null
- AND, CClatitude__c is null
- AND, CClongitude__c is null

If geocoding failed, 9999 will be set to latitude and longitude. So these records will be skipped for next geocoding.

Important:

Free geocoding does NOT guarantee its result. Samurai-system does NOT take any responsibility for results of geocoding, nor any direct or indirect damage or loss due to

result of geocoding.

Important:

If you get latitude/longitude by CCMaP's geocoding functionality, geocoded value can be used **ONLY FOR CCMaP** system. If you use geocoded value for any other purposes, it violates end user license agreement. Therefore, if you plan to use latitude/longitude for any other purpose we strongly suggest to geocode your data by external geocoding services to fit your purposes.

Note:

In evaluation period, you can run geocoding for Account **ONLY**.

Once valid geocoding-license-key is entered in custom setting, "CC_config", you can run geocoding on other objects.

Custom Setting

CC_config

[Help for this Page](#) 

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.

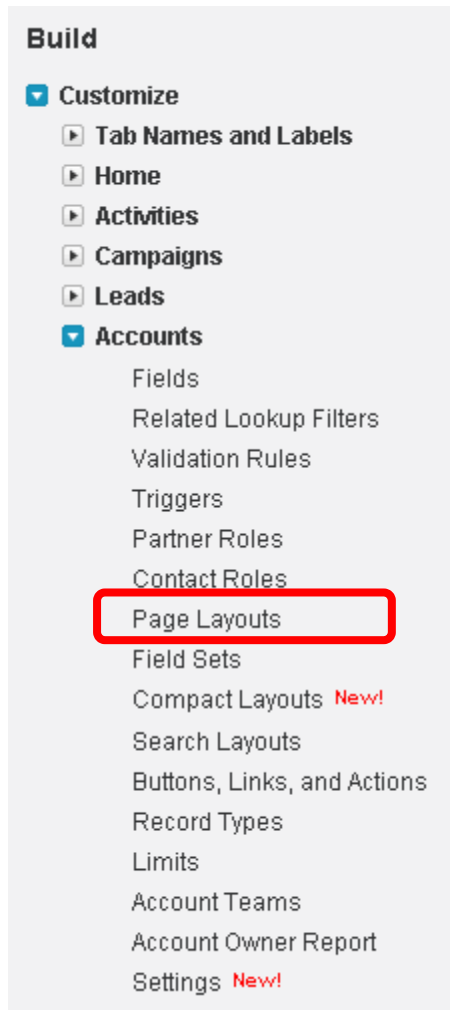
[Edit](#) [Delete](#)

▼ Default Organization Level Value

Location	Samurai System	defaultAreaFilter	☐
defaultLat	0.00000000	defaultLon	0.00000000
defaultZoom	15	map_NameFilterForReport	☒
map_NameFilterForView	☐	maxResults	20,000
CCTargetSObjects	lead,account,contact	defaultTaskTitle	MyTask
defaultEventTitle	MyEvent	CCGeocodingLicenseKey	

5. Show small map on Object Detail page (For Account, Contact, and Lead)

Go to page layout of Account/Contact/Lead, select VisualForce component, choose CCMapper component and drag drop to page Layout.

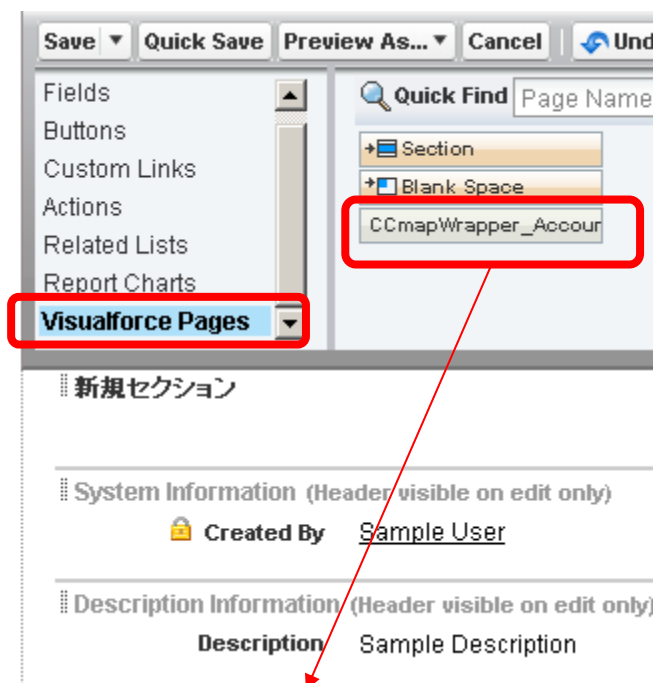


Open Page Layouts for Account.

Choose VisualForcePages

Drag Drop "CCMapper_Account" to page.

For Contact or Lead, do the same.



6. Use Custom Objects for Map

CCMap offers functionality for Account, Contact, and Lead as default. However, you may use other Salesforce Object or Custom Object to display on Map. To do so, you need to do following.

1. Add custom fields with name “CCLatitude__c” and “CCLongitude__c” on SObject you want to use for CCMap.

You may add CCAddress__c, if you want to use geocoding.

2. Register SObject type name on custom setting.

If you want to use Lead, Account, and ‘myobj__c’, set “CCTargetSObjects” as following example.

CC_config Edit

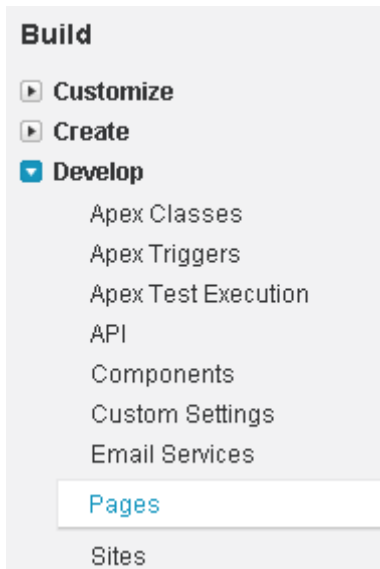
Provide values for the fields you created. This data is cached with the applic:

The screenshot shows the 'Edit CC_config' form with the following fields and values:

Field	Value
Location	Samurai System
defaultAreaFilter	☐
defaultLat	0.00000000
defaultLon	0.00000000
defaultZoom	15
map_NameFilterForReport	☒
map_NameFilterForView	☐
maxResults	20,000
CCTargetSObjects	lead,account,myobj__c
defaultTaskTitle	MyTask
defaultEventTitle	MyEvent
CCGeocodingLicenseKey	

Adding small map on detail page for CUSTOM OBJECT.

If you want small map on detail page for custom object or Salesforce objects except Lead, Account, and Contact, you need to do a little work.



1. Go to sidebar→Build→Develop→Pages,
2. Open page, "CCmapWrapper_Templatefor_customSObject", and copy whole code.
3. Back to sidebar→Build→Develop→Pages.
4. Create New page.
5. Paste code.
6. Edit first line as following, and save.

```
<apex:page standardController="CustomerCompass__c">
```

↓

```
<apex:page standardController="myobj__c">
```

Edit this line only

Now this new page you created is available in page layout for your custom object.

Do same procedure as following section.

Show small map on Object Detail page (For Account, Contact, and Lead)

7. Customized Icon (CCIcon__c)

CCMap use GoogleMaps' default icon.

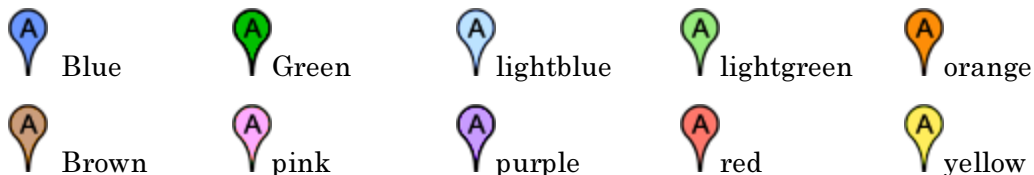
You can customize icon in various way, by adding custom field **CCIcon__c** on SObject.

CCIcon__c should be text filed or text type expression field.

CCMap prepare following icons for your convenience.

1. Balloon icons

Icons with a letter. 0 to 9, A to Z, and blank. 10 colors are available.



To set these icons, value of CCIcon__c should be following format.

COLOR,LETTER

Example:

blue,A

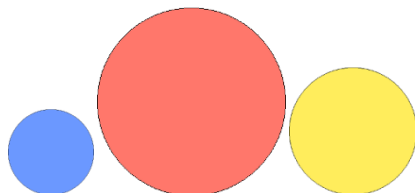
red,7

orange,Z

pink, (no letter in balloon)

2. Circle icons

10 colors of circle icon are also available. With expression, you can use as if bubble chart.



To set circle icons, value of CCIcon__c should be following format.

COLOR,"circle",RADIUS(in pixel)

Examples:

blue,circle,20

red,circle,50

yellow,circle,80

External Icons

To set external icons, value of CCIcon__c should be URL of external image.

For Example:

<http://google-maps-icons.googlecode.com/files/teal00.png>



Note:

If URL is not static image URL – such as ASP with parameters -, CCMAP may failed to get icon image.

Tips:

If you want to store icon image files within Salesforce, do following.

1. Pack icon image files into one ZIP file.
2. Sidebar→Build→Static Resources
3. Create New Static Resource. Assume name is “icons”.
4. For CCIcon__c, set as following

/resource/(static resource name)/(image file name)

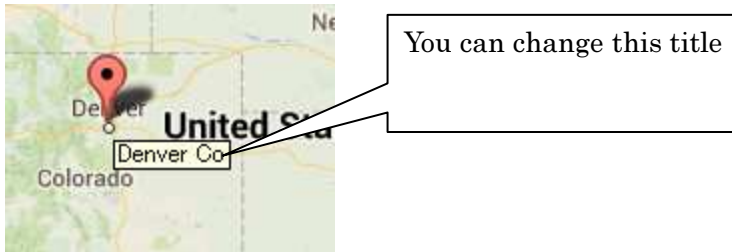
Example:

/resource/icons/mycustomicon1.png

/resource/icons/mycustomicon2.png

8. Customized Title for Icon (CCtitle__c)

Title displayed in tooltip for icon can be modifiable. Default value is 'Name' field of SObject.



You can add custom field `CCtitle__c` as text field or field type expression field.

9. Modify Contents of Info Window (CCdescription__c)

When you click on icon on CCMMap, Name of SObject is shown and link to record page in SalesForce.



You can customize contents of info window by defining custom field, **CCdescription__c** as text field or text type expression field.

Please write **HTML** code for **CCdescription__c**. That will be shown in info Window.

10. Hide some records from CCMaP(CCexclude__c)

For some reason, you do NOT want to show some record on CCMaP.

You can control whether show Icon on Map or NOT, by defining custom field, **CCexclude__c** as Boolean field or Boolean type expression field.

If the value of **CCexclude__c** of some records are TRUE, those records NEVER be displayed on CCMaP.

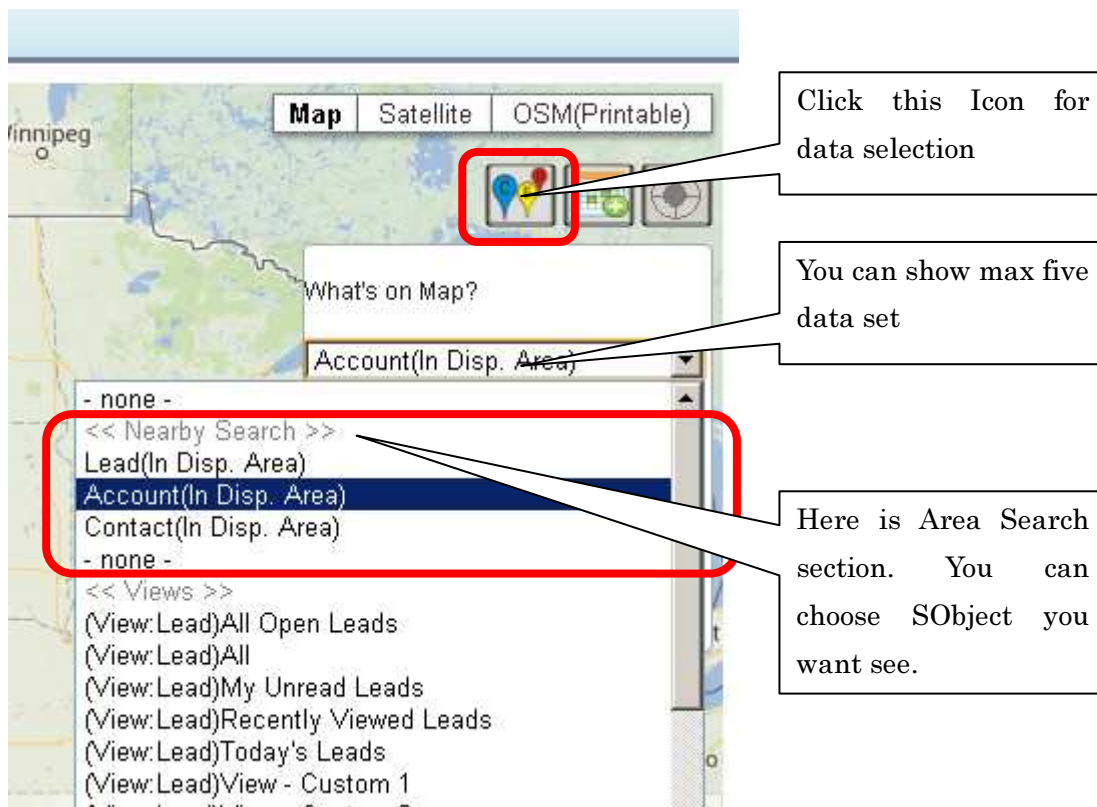
11. Area Search

Display icons for records within displaying area.

As moving map area, icons will be appearing for newly displayed area.

Note:

If you zoom-out to large scale (such as world map), the number of Icons within displayed area may be too large, and may cause decreasing performance.



12. Filtered data by “SalesForce View”

The screenshot shows the Customer Compass interface. On the left, a map of Minnesota is displayed with a search bar labeled "What's on Map?". Below the search bar, a dropdown menu shows "Account(In Disp. Area)" and "- none -". Below this, a list of views is shown, including "Lead(In Disp. Area)", "Account(In Disp. Area)", "Contact(In Disp. Area)", and "- none -". A red box highlights the "Views" section, which lists various views for Leads and Accounts. A callout box points to this list, stating: "List of View for your target SObject will be on list, just like View List of SObject. You can filter record to show on CCMAP."

Map Satellite OSM(Printable)

What's on Map?

Account(In Disp. Area)

- none -

- none -

<< Nearby Search >>

Lead(In Disp. Area)

Account(In Disp. Area)

Contact(In Disp. Area)

- none -

<< Views >>

(View:Lead)All Open Leads

(View:Lead)All

(View:Lead)My Unread Leads

(View:Lead)Recently Viewed Leads

(View:Lead)Today's Leads

(View:Lead)View - Custom 1

(View:Lead)View - Custom 2

- None -

(View:Account)All Accounts

(View:Account)My Accounts

(View:Account)New Leads 10/10/13

Leads Accounts Contacts

Leads Home

View: All Open Leads

All

All Open Leads

My Unread Leads

Recently Viewed Leads

Today's Leads

View - Custom 1

View - Custom 2

List of View for your target SObject will be on list, just like View List of SObject.
You can filter record to show on CCMAP.

If you want selected Views on the list, instead of ALL views, You have an option.

In Custom Setting → CC_config, check “map_NameFilterForView”.

Custom Setting CC_config

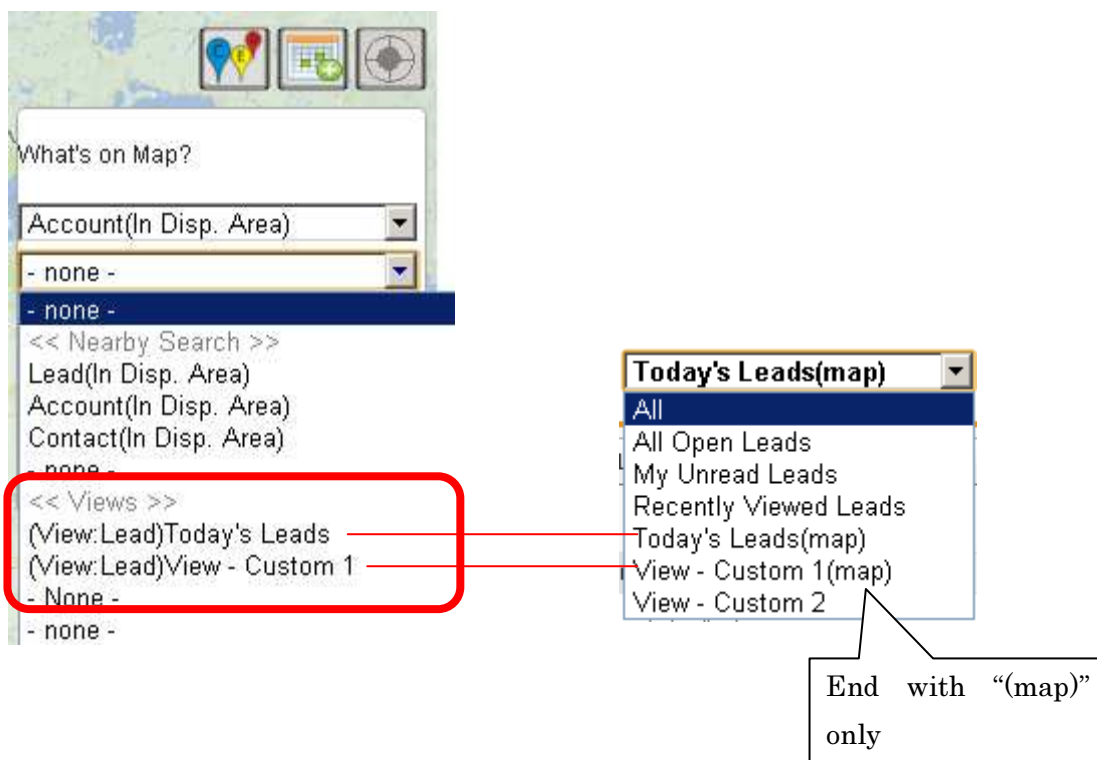
If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting codes, each set might include the country's name and dialing code.

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

▼ Default Organization Level Value	
Location	<u>Samurai System</u>
defaultLat	0.00000000
defaultZoom	15
map_NameFilterForView	☒
CCTargetObjects	lead,account,contact
defaultEventTitle	MyEvent
defaultAreaFilter	☐
defaultLon	0.00000000
map_NameFilterForReport	☒
maxResults	20,000
defaultTaskTitle	MyTask
CCGeocodingLicenseKey	

And, add string “(map)” at the end of view Name which you want on CCMap data list.

Then, ONLY views which has “(map)” at the end of name are on list.



13. Filtered data by “SalesForce Report”

Similarly to filter data by View, CCMAP can use Salesforce Report as a data filter.

In Custom Setting, we **strongly recommend to CHECK** on “map_NameFilterForReport”, to limit which report should be on data list, because the number of reports are usually very large.

Custom Setting CC_config

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a set of 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, different values to display depending on whether a specific user is running the app, a specific profile, or just

[Edit](#) [Delete](#)

▼ Default Organization Level Value

Location	Samurai System	defaultAreaFilter	☐
defaultLat	0.00000000	defaultLon	0.00000000
defaultZoom	15	map_NameFilterForReport	☒
map_NameFilterForView	☒	maxResults	20,000
CCTargetSObjects	lead,account,contact	defaultTaskTitle	MyTask
defaultEventTitle	MyEvent	CCGeocodingLicenseKey	

Then, you need to do a little work on report.

1. Rename report by adding “(map)” at the end.
2. Set ID as a first column of report. Make sure the record of those ID have valid CCLatitude__c and CCLongitude__c values.

 myReport_02(map)

Report Generation Status: Complete

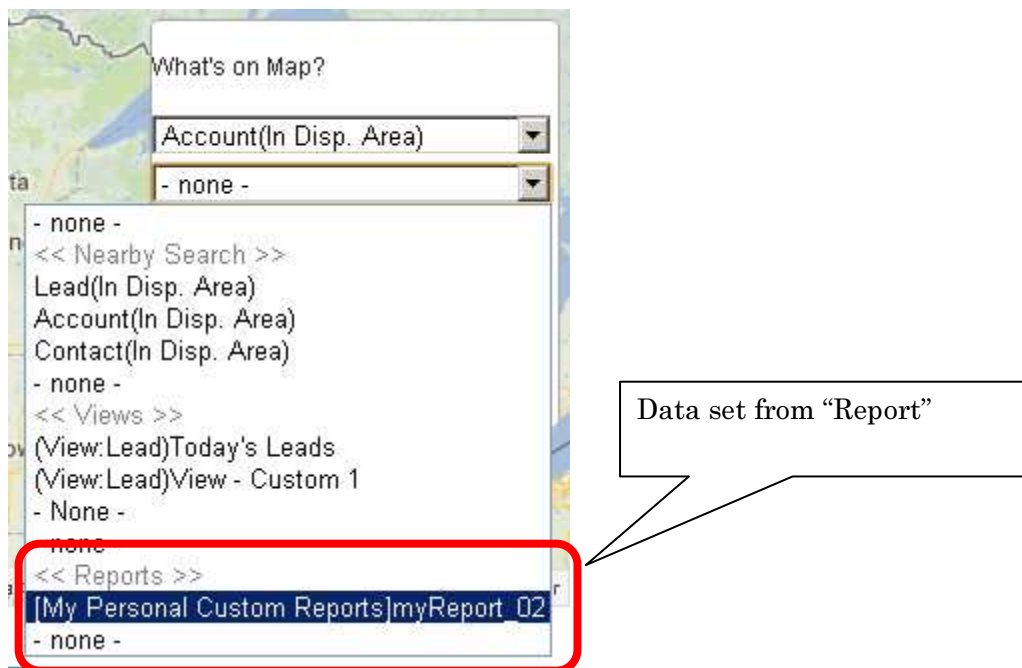
Report Options:

Summarize information by: --None-- Show: My accounts

Time Frame: Date Field: Created Date Range: Custom From:

[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Data](#)

Account ID	Account Name	Type	Rating	Last /
0011000000abTgo	dateline.co			



Note:

If report returns a lot of records, CCMap may not be able to handle or performance become slow. However, displaying thousands of icons on Map is meaningless. You may consider using appropriate filter to decrease icon on map.

14. Adding to Task or Event (Activity Add Mode)



Once you show some icon on CCMaP, you can use “Activity Add Mode”.

In this mode, you can add “Item” by clicking on icon. Clicked records are added on list

Note:

If there are other icons behind icon you clicked, it is very difficult to click icon in behind.

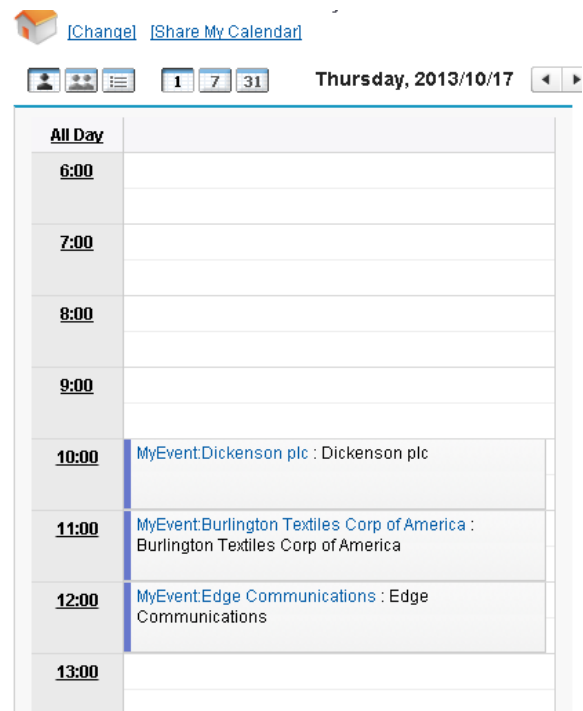
Thus, in case location is the same or very close, CCMaP shows list of Records and you choose one for operation.

Once you choose icon, you can either one of following

- Add Task with selected Item(s)
- Add Event with selected Item(s) and entered DateTime.

For adding Event, event will be created from time you enter, and repeat each item for one hour event.

As soon as you clicked “Add Event” button, schedule screen will be opened in new window, so you can easily adjust created-event by drag drop.



Custom Setting CC_config

[Help for this Page](#) ?

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.

EditDelete

▼ Default Organization Level Value

Location	Samurai System	defaultAreaFilter	☐
defaultLat	0.00000000	defaultLon	0.00000000
defaultZoom	15	map_NameFilterForReport	☒
map_NameFilterForView	☒	maxResults	20,000
CCTargetObjects	lead,account,contact	defaultTaskTitle	MyTask
defaultEventTitle	MyEvent	CCGeocodingLicenseKey	

For Activity Adding Mode, you may define customized title for Event or Task. This can be defined in Custom Setting.

10:00	MyEvent:Dickenson plc : Dickenson plc
11:00	MyEvent:Burlington Textiles Corp of America : Burlington Textiles Corp of America
12:00	MyEvent:Edge Communications : Edge Communications
13:00	

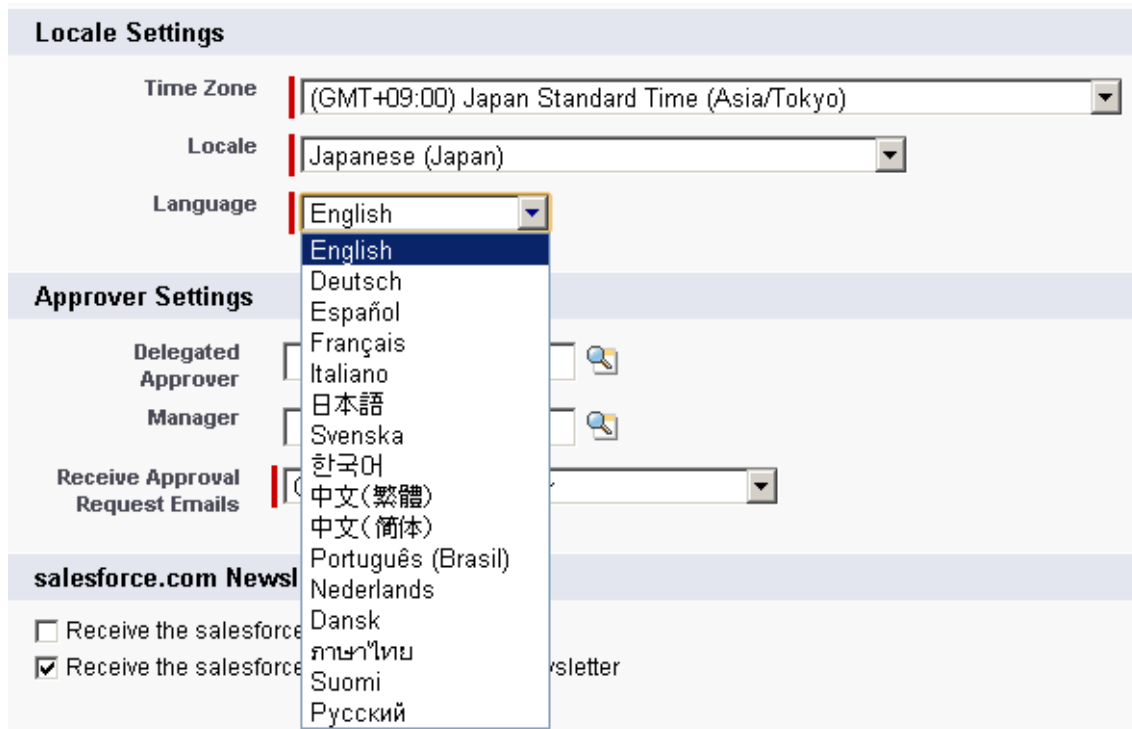
15. Language preference

CCMap detects login user's Locale Setting → Language, then give it to GoogleMaps.

You can see GoogleMaps in selected language.

Note:

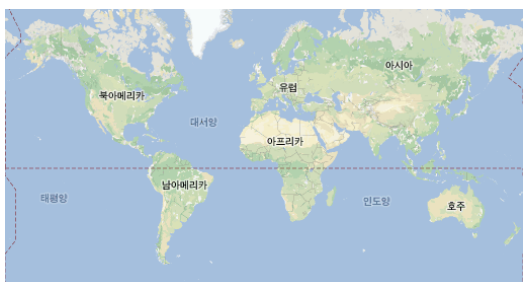
Menu of CCMap is English or Japanese only.



English



Simplified Chinese



Korean



Japanese

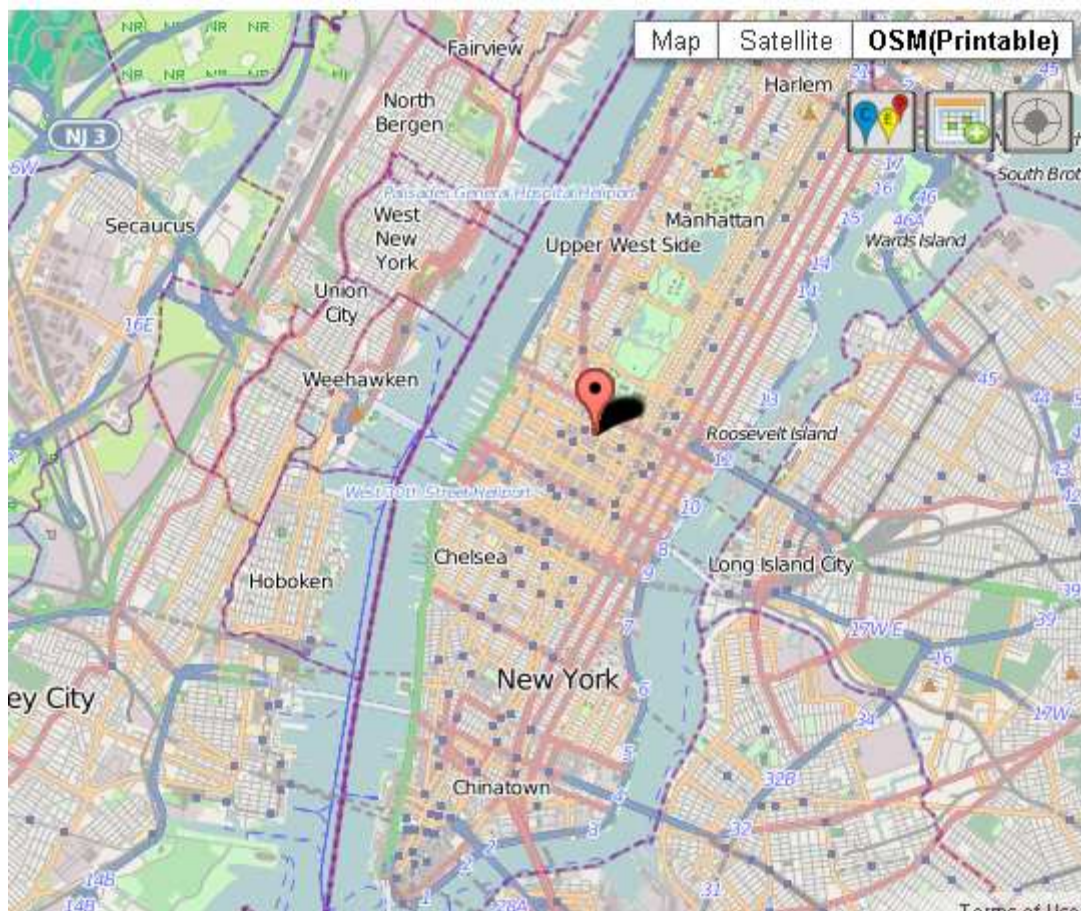
16. OpenStreetMap mode for printing

Screen capture or printing Map on paper is violating license of GoogleMaps, and accordingly of CCMap.

Therefore, CCMap provides OpenStreetMap layer for printing or any other purpose without violating license of GoogleMaps or CCMap.

For detail of OpenStreetMap, visit

http://wiki.osmfoundation.org/wiki/Main_Page



17. CCMAP Configuration (in custom setting)

CCMap can configurable some functionalities.

Note:

These are stored in custom setting CC_config, and stored as organization default. That means, sharing only one setting for your organization.

Custom Setting

CC_config

Help for this Page ?

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.

Edit

Delete

▼ Default Organization Level Value

Location	Samurai System	defaultAreaFilter	☐
defaultLat	0.00000000	defaultLon	0.00000000
defaultZoom	15	map_NameFilterForReport	☒
map_NameFilterForView	☒	maxResults	20,000
CCTargetSObjects	lead,account,contact	defaultTaskTitle	MyTask
defaultEventTitle	MyEvent	CCGeocodingLicenseKey	

- defaultAreaFilter:
Currently not used
- defaultLat, defaultLon
Used in case HTML geolocation is failed.
- defaultZoom
Default Zoom level of GoogleMaps
- map_NameFilterForReport
If true, only shows Salesforce report which end with “(map)” in dataset
- map_NameFilterForView
If true, only shows Salesforce view which end with “(map)” in dataset
- maxResults
Max number of records to query. It must be less than Salesforce limit.
- CCTargetSObjects
Define which SObject is used for CCMAP. If empty, use “account,contact,lead” is used as a default.

- defaultTaskTitle

In Activity Add mode, use this value for title of created Task.

- defaultEventTitle

In Activity Add mode, use this value for title of created Event.

- CCGeocodingLicenseKey

In free evaluation period, you can use geocoding functionality for only Account Object. After license is purchased, GeocodingLicenseKey is issued to unlock limitation, and key must be set to this field.

End Of Document.