

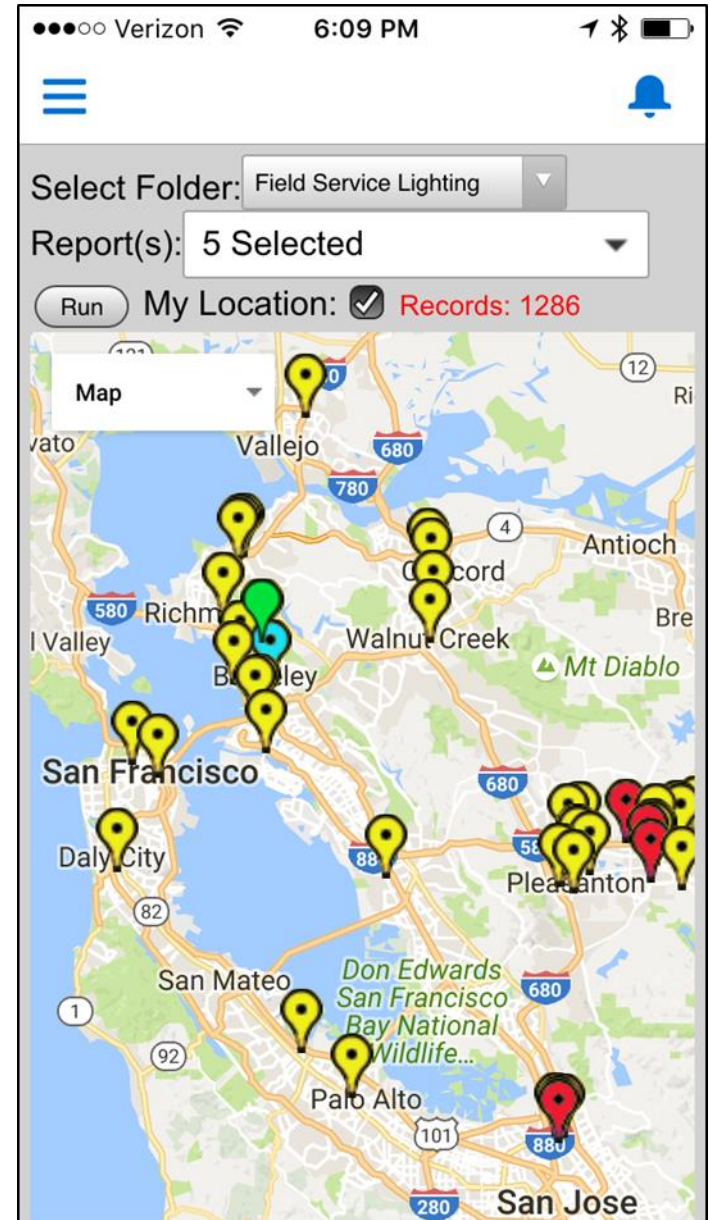


Check-in App

New "Reports Map"

Display Salesforce Reports As Map Layers

March 2017



Report Results displayed on a Map

“BART SF Bay Area” in Report Folder “Check-in Map Reports”

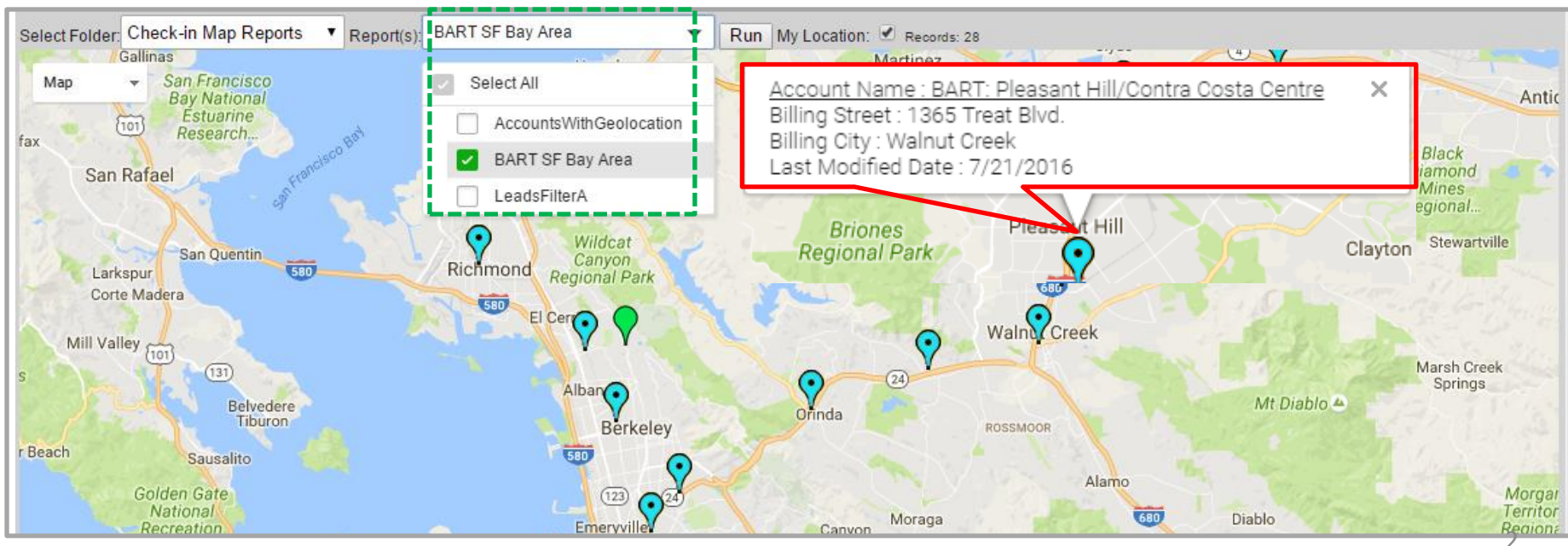
 **BART SF Bay Area**

Help for this Page ?

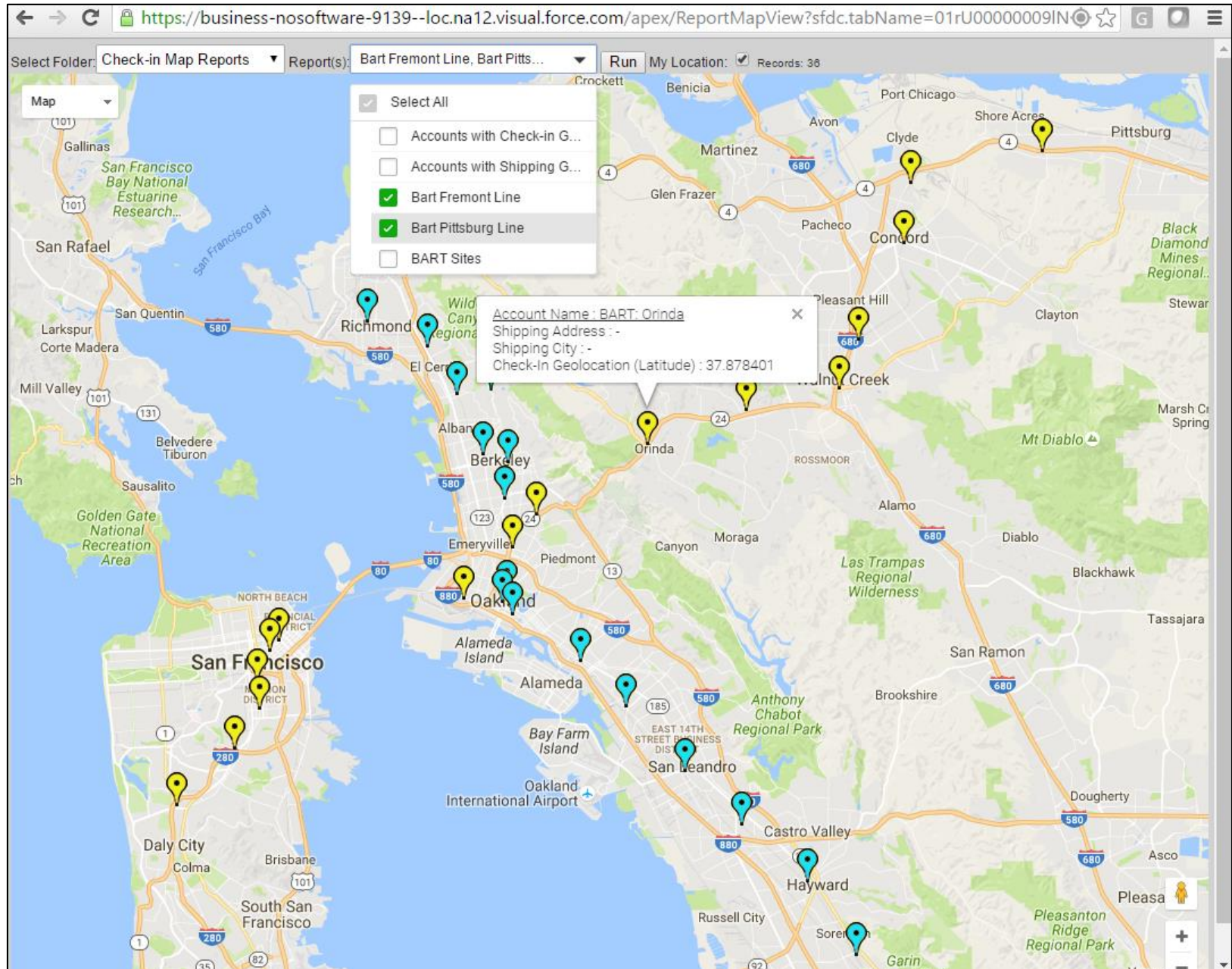
Filtered By: [Edit](#)
Account Name contains BART [Clear](#)

Account Name	Billing Street	Billing City	Last Modified Date	Check-In Geolocation (Latitude)	Check-In Geolocation (Longitude) +
BART: West Dublin/Pleasanton	6501 Golden Gate Drive	Dublin	7/21/2016	37.701043	-121.927078
BART: Pittsburg/Bay Point	1700 West Leland Road	Pittsburg	7/21/2016	38.015514	-121.945624
BART: Fremont	2000 BART Way	Fremont	7/21/2016	37.557385	-121.976762
BART: Union City	10 Union Square	Union City	7/21/2016	37.590736	-122.017256
BART: North Concord/Martinez	3700 Port Chicago Highway	Concord	7/21/2016	38.003108	-122.024333
BART: Pleasant Hill/Contra Costa Centre	1365 Treat Blvd.	Walnut Creek	7/21/2016	37.928477	-122.055928
BART: South Hayward	28601 Dixon Street	Hayward	7/21/2016	37.634350	-122.057190
BART: Walnut Creek	200 Ygnacio Valley Road	Walnut Creek	7/21/2016	37.905463	-122.067564

Select Report “BART SF Bay Area” to display results on a Google Map



Display 2 Reports on a Map



Select & Run Reports

The screenshot shows a web application interface for selecting and running reports. The background is a map of the San Francisco Bay Area. Overlaid on the map is a 'Select Folder' dropdown menu (Step 1) showing a list of report folders: 'Check-in Admin Reports', 'Check-in Map Reports' (highlighted), 'Field Service Reports', and 'Fleet Telematics'. To the right of this menu is a 'Report(s):' dropdown (Step 2) showing '5 Selected'. Below these is a list of report types with checkboxes: 'Select All' (checked), 'Event Map Report' (checked), 'Leads El Monte' (unchecked), 'Leads In Fresno' (checked), 'Leads in Glendale' (unchecked), 'Leads in LA' (unchecked), 'Leads New Report Type' (checked), 'Leads With Filter' (checked), 'Map Test 2' (unchecked), and 'Map Test Report' (checked). To the right of the report list is a 'Run' button (Step 3) and a 'My Location:' checkbox (Step 4) which is checked. A green pin marker is visible on the map near Berkeley. A text box on the right side of the image contains the following numbered steps:

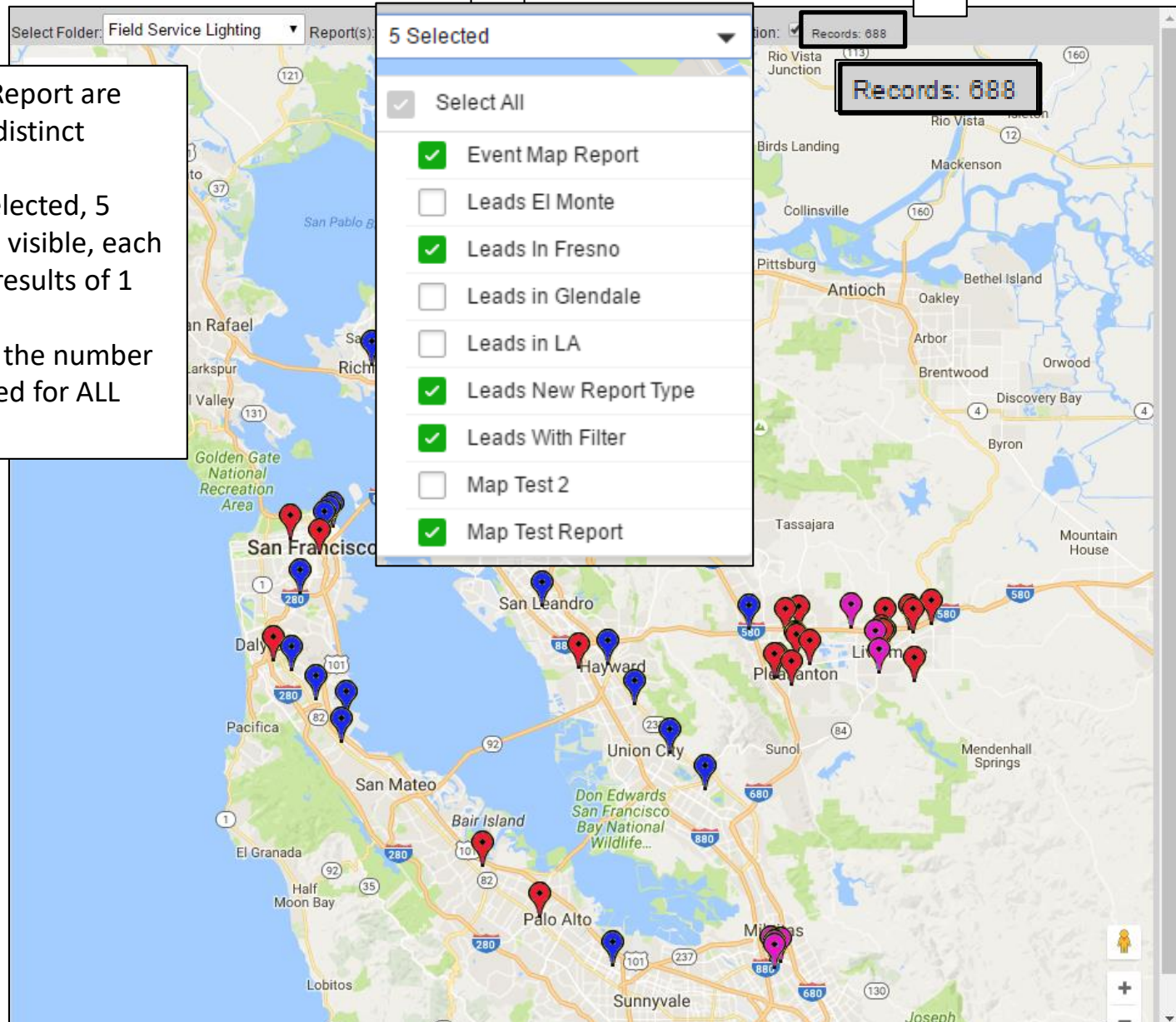
1. Select 1 Report Folder
2. Select 1 or more Reports (Max 5)
3. Click "Run"
4. Toggle User Location On/Off (green marker)

Reports and Corresponding Map Markers

1

1. Results for each Report are displayed with a distinct marker color.
2. If 5 reports are selected, 5 marker colors are visible, each color represents results of 1 report.
3. "Records: XXX" is the number of records returned for ALL selected reports.

2



Report Columns and Map Marker “Popups”

 **Map Test Report**

Help for this Page

Report Generation Status: Complete

Report Options:

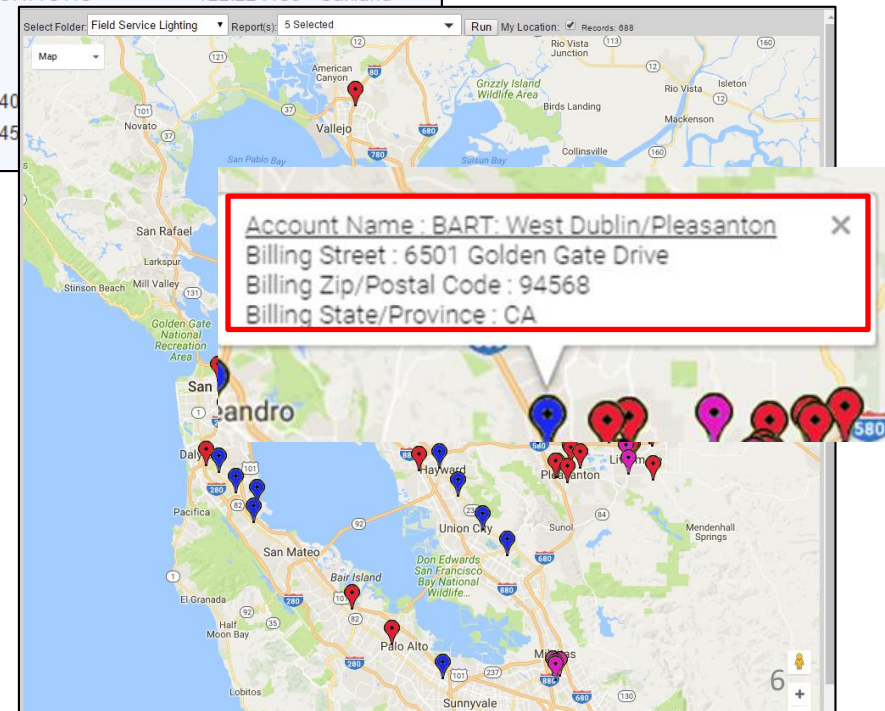
Summarize information by: --None-- Show All accounts

Time Frame
Date Field Created Date Range Custom
From 7/22/2015 To 7/29/2016

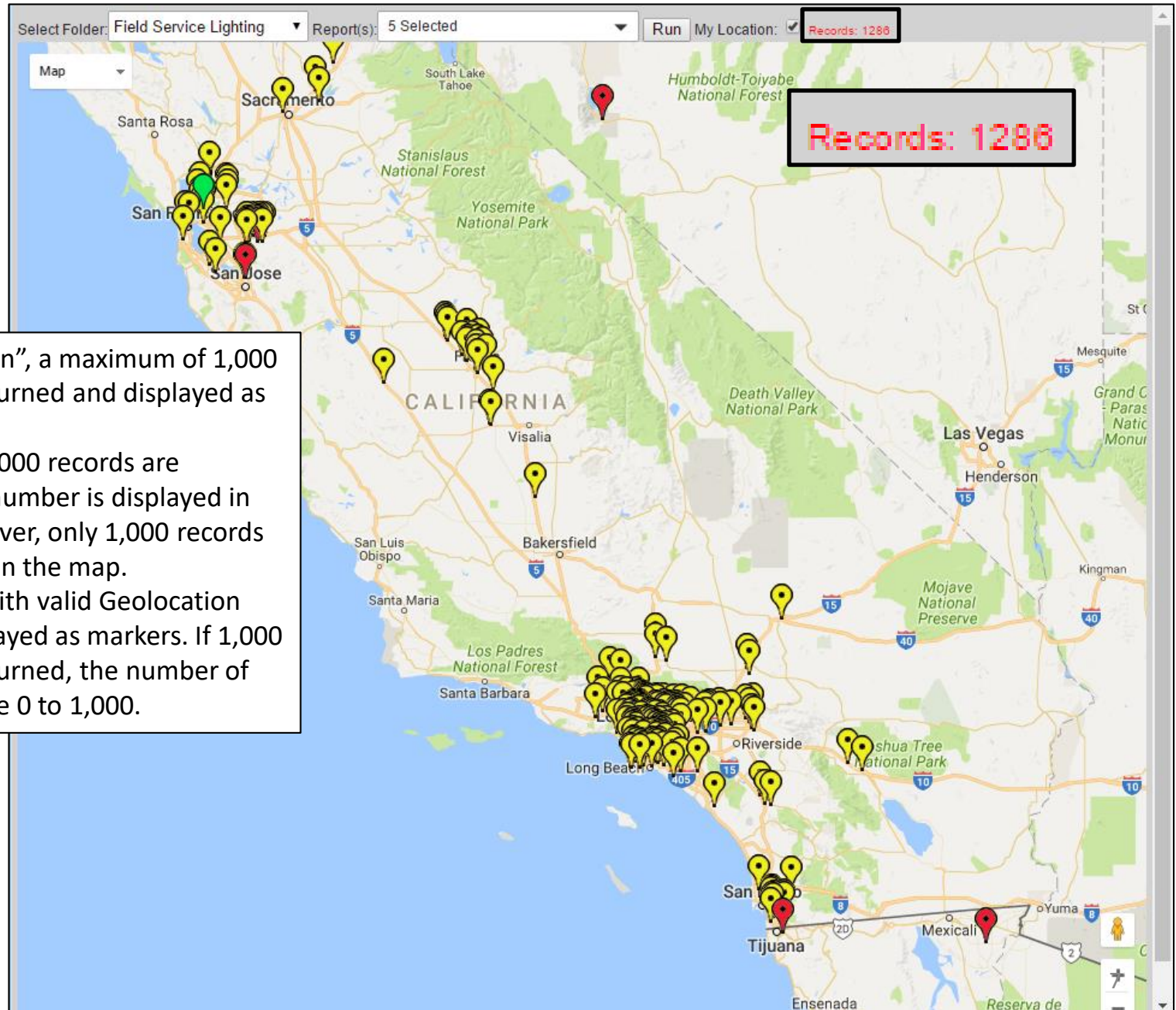
Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Account Name	Billing Street	Billing Zip/Postal Code	Billing State/Province	Check-In Geolocation (Latitude)	Check-In Geolocation (Longitude)	Billing City
BART Lake Merritt	800 Madison Street	94607	CA	37.797330	-122.265241	Oakland
BART North Concord/Martinez	3700 Port Chicago Highway	94520	CA	38.003108	-122.024333	Concord
BART Fruitvale	3401 East 12th Street	94601	CA	37.775113	-122.224186	Oakland
Grand Hotels & Resorts Ltd	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	-	IL			
United Oil & Gas Corp.	1301 Avenue of the Americas	10019	NY			
Express Logistics and Transport	620 SW 5th Avenue Suite 400	97204	OR			

1. Report results (rows) are displayed as markers on the map.
2. On clicking a marker, the popup displays the values of the first 4 report columns, the 4 column labels are also displayed. Note, the popup is unique for each report.

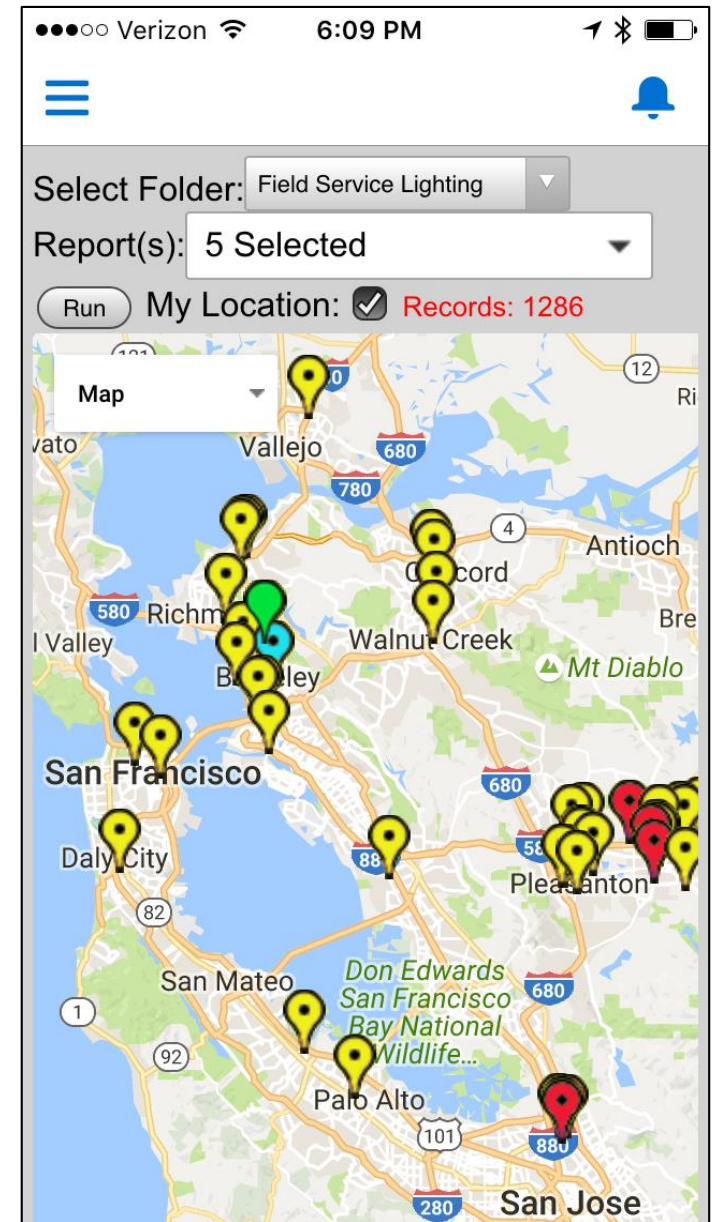
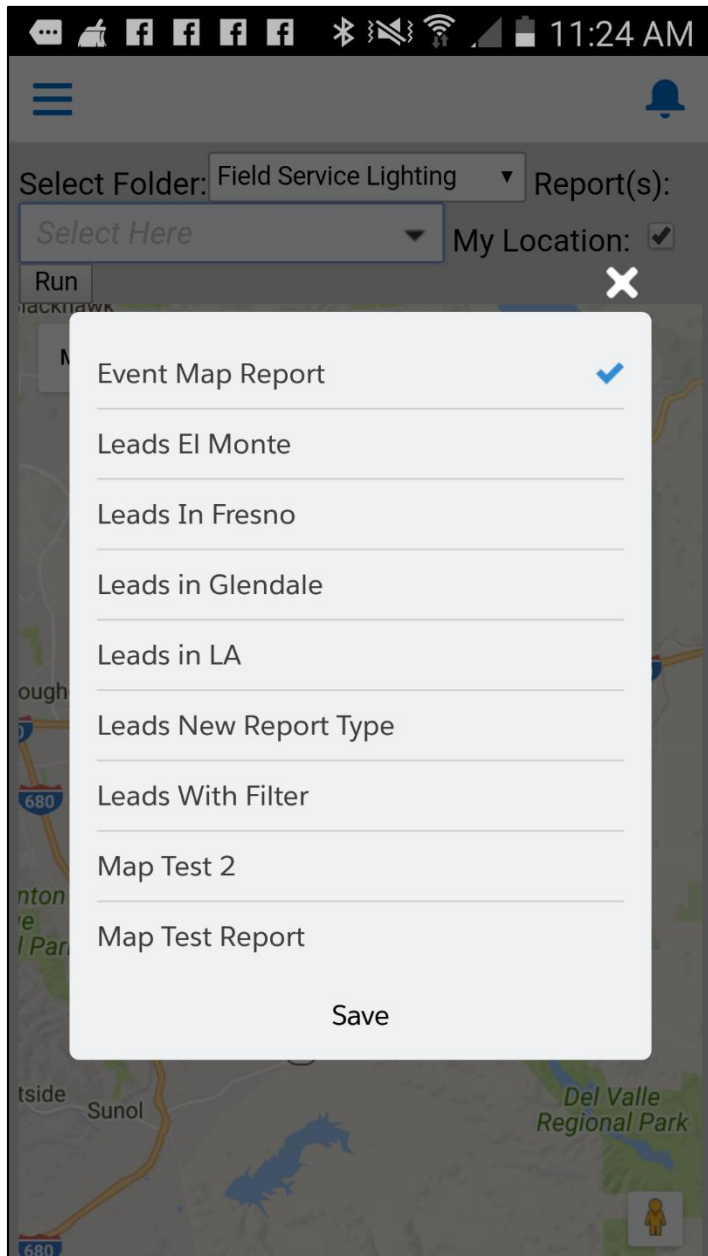


Maximum Records



1. On clicking “Run”, a maximum of 1,000 records are returned and displayed as map markers.
2. If more than 1,000 records are returned, the number is displayed in red font. However, only 1,000 records are displayed on the map.
3. Only records with valid Geolocation fields are displayed as markers. If 1,000 records are returned, the number of markers may be 0 to 1,000.

Report Map: Salesforce 1 Mobile App on iOS and Android



Salesforce Limits:

- 500 Synchronous Report API calls / hour per Org (total for all users)
 - “Reports and Dashboards REST API Limits”: “Your org can request up to 500 synchronous report runs per hour.”
https://help.salesforce.com/apex/HTViewHelpDoc?id=limits_analyticsapi.htm&language=en_US

Report Requirements:

- Reports must be saved in a “Public” Reports Folder
 - Only “Public” reports folders are accessible in the “Select Folder” dropdown
- Report Type: TABLE
 - Summary & Matrix Reports not supported
- Geolocation:
 - Geolocation Fields must be included in report.
 - One column for Latitude: column label must include text “Latitude”
 - One column for Longitude: column label includes text “Longitude”
- A marker is displayed if a record has valid Geolocation values.
 - In decimal format (example -122.37856)
 - Latitude value: -90.0 to + 90.0
 - Longitude value: -180.0 to + 180.0

Display Report Results on Map

- Up to 5 reports maybe selected.
- Up to 1,000 records are returned upon running the selected reports.
- Up to 1,000 markers are displayed on the map.

Geolocation Fields

- Geocode information identifies a location using a latitude, a longitude, and an accuracy rating. Geocode fields are available for standard addresses on accounts, contacts, and leads in Salesforce. Geocode fields are not visible on records, but they can be viewed using the Salesforce API.

https://help.salesforce.com/apex/HTViewHelpDoc?id=data_dot_com_clean_geocode_information_fields.htm&language=en_US

Enable Salesforce Auto Populate Geolocation fields on Accounts & Contacts

1. Setup data.com Clean Rules:

- https://help.salesforce.com/HTViewHelpDoc?id=data_dot_com_clean_admin_set_up_clean_rules.htm&language=en_US

Check-in App includes a Custom Report type with Geocode Fields for Accounts & Contacts:

Reports Folder: “Check-in Map Reports”

Report: “Accounts/ Contacts with Geolocation”

 **Accounts/Contacts with Geolocation**

Report Generation Status: Complete

Report Options:

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

Time Frame
Date Field: Birthdate Range: Custom
From: To:

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe

Account Name	Full Name	GeoCodeAddress	Latitude for Checkin Maps	Longitude for Checkin Maps
Global Media	Geoff Minor	Shipping	43.6556914001	-79.3863192697
Global Media	Carole White	Shipping	43.6556914001	-79.3863192697
Global Media	Jon Amos	Shipping	43.6556914001	-79.3863192697
Acme	Edward Stamos	Billing	40.7535480000	-73.9583940000
Acme	Howard Jones	Billing	40.7535480000	-73.9583940000
Acme	Leanne Tomlin	Billing	40.7535480000	-73.9583940000

- Popup Marker reference link field (ie, hyperlink) is based on report columns.
- Logic expects lookup column to retrieve Record Id and Record Label.
- System expects if Record Label contains 'Name' or 'Subject' text then it is a lookup field, and takes this record as master and builds reference link to this record (ie the popup hyperlink to the record detail page).
 - Standard and Custom Objects typically have a field “NAME”
 - Event field does not have standard field “NAME”, has field “Subject”
- if report has TWO Columns, one column with NAME and One Column with Subject, implying two Lookup Fields, then assume the First Column is the Master, and in popup first row create hyperlink to the first column and in popup second row display the LABEL of the second column.
 - Pls see next two pages

Appendix # 3: Popup Hyperlink (Continued)



Events and Related Accounts

Report Generation Status: Complete

[Amin Source](#) | [Checkin Source](#) | [Iankes](#)
Report Options:

Summarize information by: --None-- Show All activities Show Open

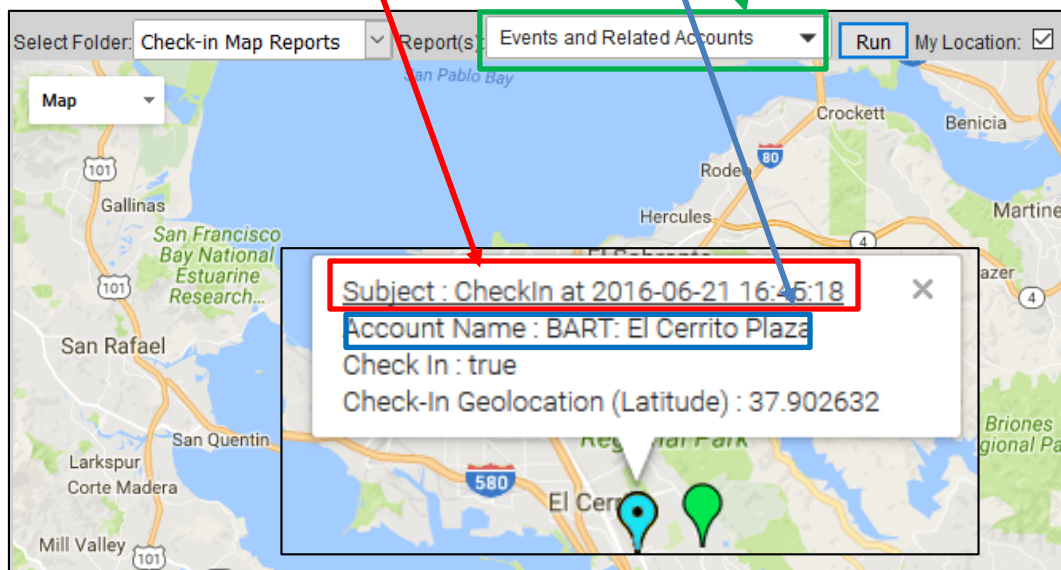
[Run Report](#) [Hide Details](#) [Customize](#) [Save](#) [Save As](#) [Delete](#) [Printable View](#) [Export Details](#) [Subscribe](#)

Subject ↑	Account Name	Check In	Check-In Geolocation (Latitude)	Check-In Geolocation (Longitude)
CheckIn at 2016-06-21 16:45:18	BART: El Cerrito Plaza	☒	37.902632	-122.298860
CheckIn at 2016-06-22 09:08:18	National University LVIV	☒	49.798745	24.060510

In Report, the “Subject” column links (drill down) to the Event Detail page and the “Account” column links to the Related Account Detail page.

When the record is displayed as a map marker, the popup includes only one link. “Subject” opens the Event Detail page.

Note, if the report is customized and the Account Name is placed in the first column, and the subject in the second column, the map marker popup link would open the related Account.



Appendix # 3: Popup Hyperlink (continued)



Events and Related Accounts

Report Generation Status: Complete

[Amin Source](#) | [Checkin Source](#) | [Iankes](#)

Report Options:

Summarize information by:

--None--

Show

All activities

Show

Open &

Run Report

Hide Details

Customize

Save

Save As

Delete

Subject ↑

Account Name

Check In

[CheckIn at 2016-06-21 16:45:18](#)

[BART: El Cerrito Plaza](#)

☒

[CheckIn at 2016-06-22 09:08:18](#)

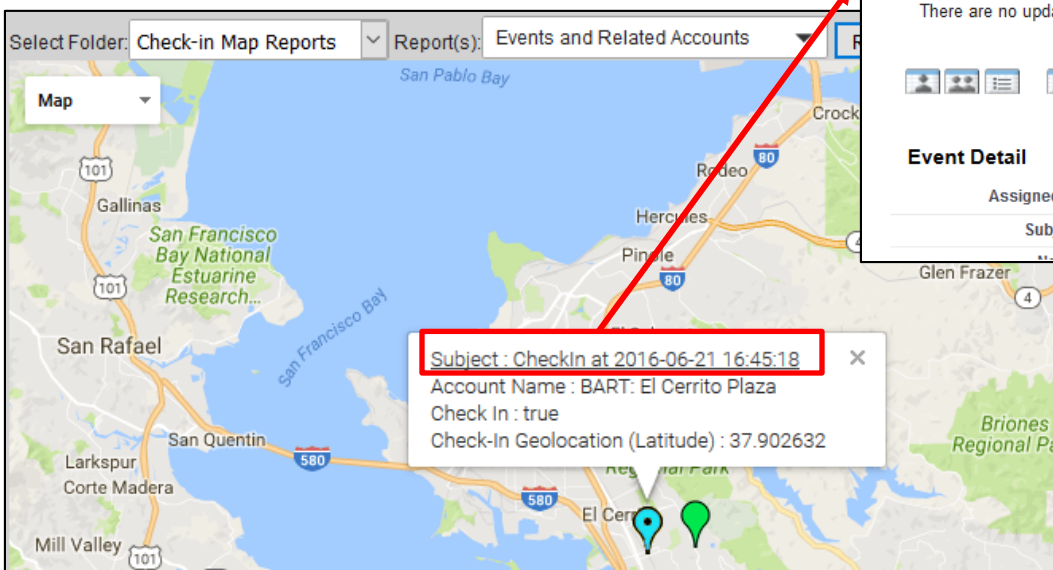
[National University LVIV](#)

☒

Select Folder: Check-in Map Reports

Report(s): Events and Related Accounts

Map



Subject : [CheckIn at 2016-06-21 16:45:18](#)
Account Name : [BART: El Cerrito Plaza](#)
Check In : true
Check-In Geolocation (Latitude) : 37.902632

The Report column "Subject" links (drill down) to the Event Detail page.
When record is displayed on the map, the "Subject" in the popup also links to the Event Detail page.

Time Frame

Home Chatter Accounts Contacts Cases Solutions Reports Dashboards Geotab M

Calendar Event

Edit Layout

CheckIn at 2016-06-21 16:45:18

Hide Feed

Post

Check-In

✓ Check-Out

Write something...

Share

+ Follow

Followers

No followers.

Search | Show All Updates

There are no updates.

1 7 31

Attachments (0)

Event Detail

Edit

Delete

Create Follow-Up Task

Create Follow-Up Event

Add to

Assigned To [Amin Source](#)

Location

Subject [CheckIn at 2016-06-21 16:45:18](#)

Start 6/21/2016 4:45 PM

Appendix # 4: Location Sharing must be Enabled (maps will not display)

