

Salesforce Maps



An Introduction to Salesforce Maps



In today's fast-paced business environment, companies need to be efficient and effective in managing their field teams. Salesforce Maps is a powerful tool that enables companies to streamline their efforts in the field, improve team collaboration, and optimize sales territories.

Salesforce Maps is available as an add-on feature for Salesforce.

So...why and when would this be useful for organizations?

Salesforce Maps helps field sales and service teams by visualizing customer and prospect locations, optimizing routes, and accessing customer information on the go. It assists in territory management, market analysis, event planning, service coverage, data visualization, and reporting. By providing visual representation, it adds another useful layer of information to the decision-making process, improves efficiency, and facilitates collaboration and communication while integrating with essential tools. Salesforce Maps can be used on employee computers, but its true power is unleashed when team members engage with it on the go - with tablets and mobile devices in the field.

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There are several compelling reasons why every C-Suite of communications and utility companies should be investing in Salesforce Maps. Let's take a look at some of the most important ones.

Improved Field Operations

Salesforce Maps can help companies optimize their field operations by providing enhanced visibility into field activities. With its advanced routing and scheduling capabilities, field service teams can optimize their routes to minimize travel time and increase the number of service calls they can make in a day. This not only increases productivity but also leads to better customer service, as customers can receive faster and more efficient service.

With Salesforce Maps, companies can:

- **Plan and optimize routes:** Salesforce Maps can help companies plan and optimize routes for field personnel.
- **Visualize field activities in real-time:** Salesforce Maps provides real-time visibility into field activities, allowing companies to track the location of field personnel and monitor their progress.
- **Increase field productivity:** By optimizing routes and providing real-time visibility into field activities, Salesforce Maps can help companies increase the productivity of their field personnel.
- **Improve customer satisfaction:** By reducing travel time and improving productivity, Salesforce Maps can help companies provide faster and more efficient service to their customers, leading to higher levels of customer satisfaction.
- **Reduce costs:** By optimizing routes and increasing productivity, Salesforce Maps can help companies reduce costs associated with field operations.
- **Drive revenue growth:** By improving customer satisfaction and reducing costs, Salesforce Maps can help companies drive revenue growth. It can also help the sales team plan and manage territories more effectively, allowing for identification of new opportunities and maximizing revenue potential.

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Competitive Advantage

In today's highly competitive market, companies need to stay ahead of the curve if they want to succeed. Salesforce Maps can provide communication and utility companies with a competitive advantage by improving their operations, increasing customer satisfaction, and driving revenue growth.

By investing in Salesforce Maps, companies can:

- **Increase competitive edge:** Enable companies to resolve issues for clients more efficiently than the next company can set organizations apart from competitors. This can also decrease costs, and allow companies to pass cost savings along.
- **Improve their operations:** Salesforce Maps can help companies optimize their field operations, leading to increased efficiency and reduced costs.
- **Increase customer satisfaction:** By providing faster and more efficient service, companies can improve customer satisfaction and loyalty.

Better Data-Driven Decision Making

Salesforce Maps provides companies with real-time data that can be used to make better, more informed decisions in the field. This data can also be used to identify areas for system and process improvements and make changes to service offerings, leading to increased customer satisfaction and revenue growth.

With Salesforce Maps, companies can:

- **Analyze data in real-time:** Salesforce Maps provides real-time data on field activities, allowing companies to make data-driven decisions on the fly.
- **Identify trends and patterns:** By analyzing data over time, companies can identify trends and patterns that can help them improve their operations.
- **Make informed decisions:** By using real-time data to make decisions, companies can make more informed decisions that lead to better outcomes.

But... I already have Field Service. What's the difference?

While both Salesforce Maps and Salesforce Field Service are focused on optimizing field operations, they serve different purposes.

Salesforce Field Service is designed to help companies manage and coordinate field

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service operations, including dispatching technicians, managing work orders, and scheduling appointments. It is primarily used by service-based companies, such as HVAC repair companies or pest control companies.

On the other hand, Salesforce Maps is designed to help companies optimize their field operations by providing real-time visibility into field activities, allowing companies to make data-driven decisions that improve efficiency, reduce costs, and enhance the customer experience. It is primarily used by companies that have a large field workforce, such as telecommunications or utility companies.

Both Salesforce Maps and Salesforce Field Service can be used together to provide a complete solution for companies that need to manage and optimize their field operations.

With its powerful mapping and optimization capabilities, Salesforce Maps can help companies improve their operations, increase customer satisfaction, and drive revenue growth. By investing in Salesforce Maps, companies can gain a competitive advantage in the market and stay ahead of the curve.

Salesforce Maps example: Fleet Delivery

KettleCo Beverage Company Name has a fleet of delivery vehicles ranging from vans to 18-wheelers. Their team members are in the field ensuring that stores are appropriately stocked with KettleCo's signature brews. Thanks to [Salesforce Maps](#), KettleCo can:

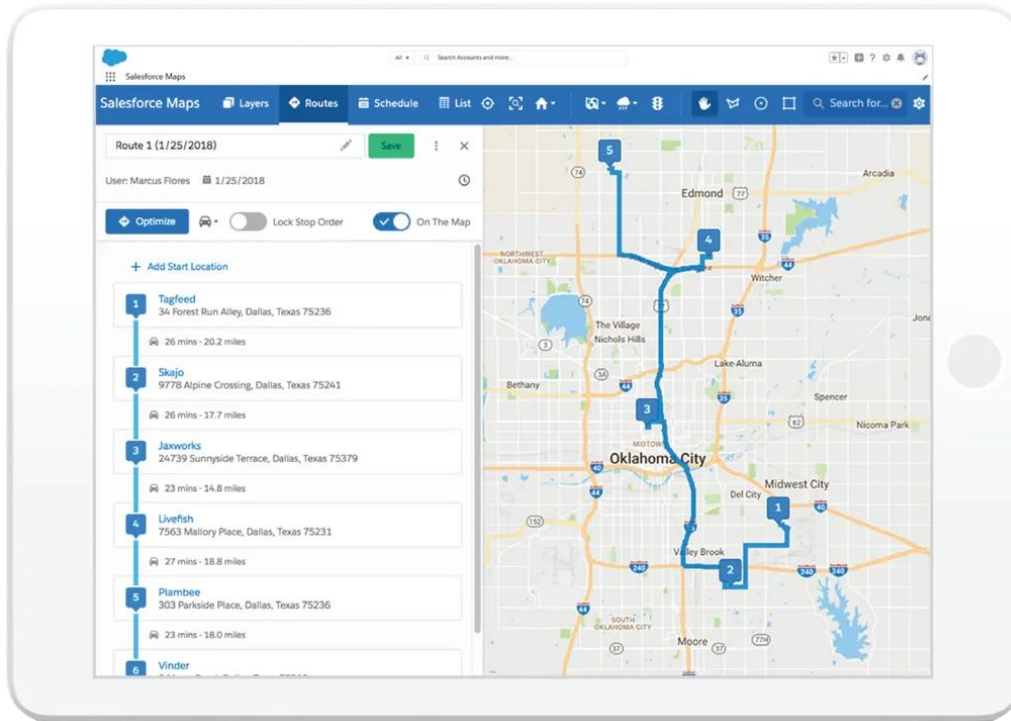
- Assignments routes to drivers based on territory
- Take into account the size/capacity of vehicle, so they're not sending their largest trucks to smaller vendors
- Track the location of delivery vehicles in real-time
- Optimize delivery routes based on traffic and weather patterns
- Provide customers with accurate delivery estimates

In addition, Salesforce Maps can provide valuable insights into driver behavior and vehicle maintenance. The company can track driver performance metrics such as average delivery time, number of stops per route, and fuel efficiency. It can also monitor vehicle performance metrics such as fuel consumption, mileage, and maintenance schedules. This data can help KettleCo identify areas for improvement and optimize fleet management strategies.

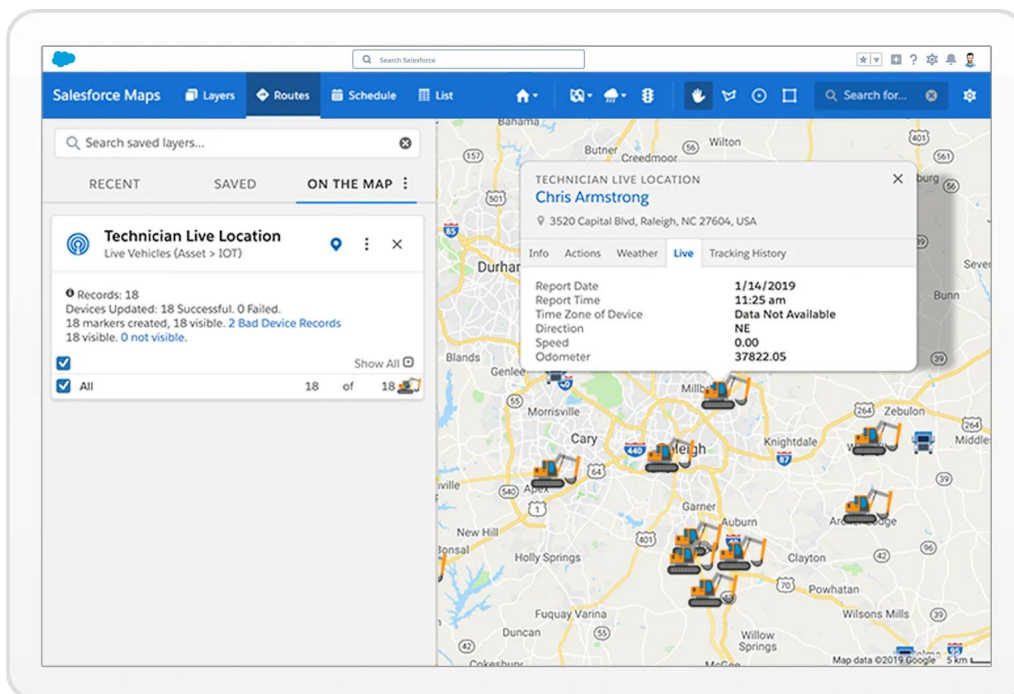
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Route Planning with travel time & live traffic



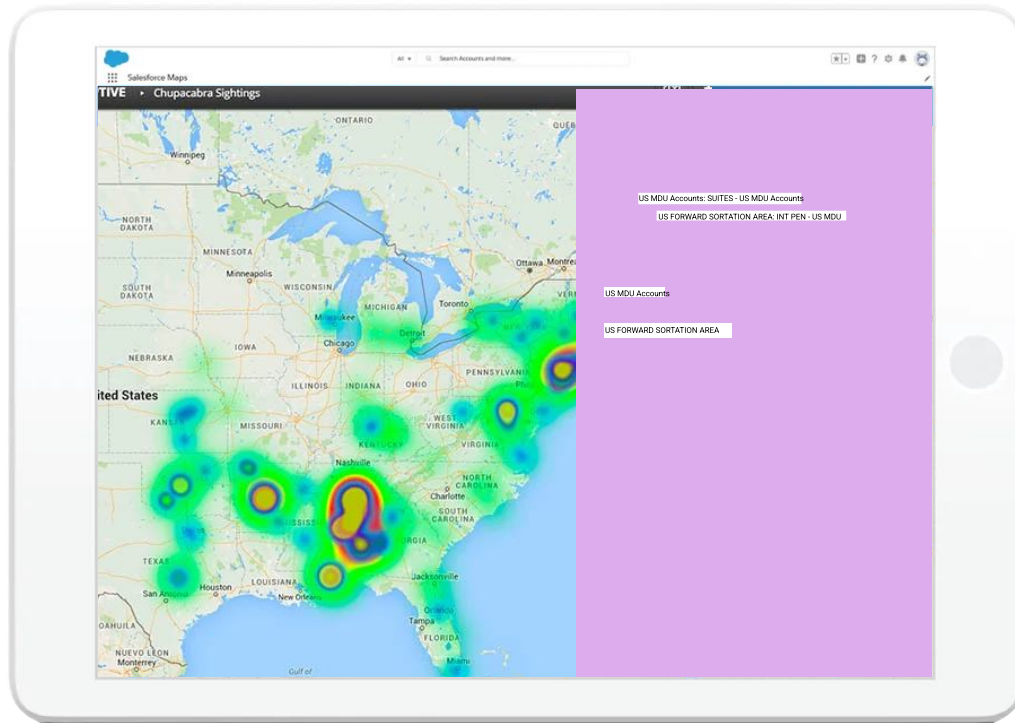
Live location updates of your Agents



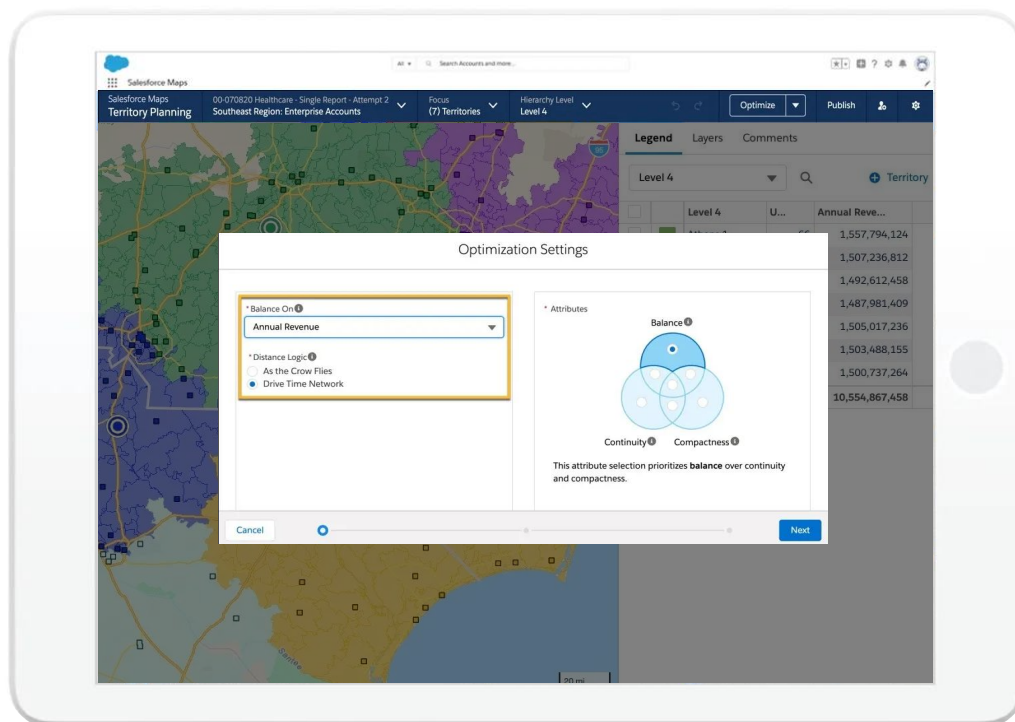
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HeatMap based on key factors for your business



Optimize Territories based on Balance, Continuity & Compactness



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There are many potential scenarios in which Salesforce Maps would make sense for a business. Use cases range from in-field decision making for service providers, to marketing planning.

Ultimately, Salesforce Maps can have a major impact on the overall Sales and Customer Service operations of a business. Here are a few common use cases:

Field Sales Management

Sales managers can use Salesforce Maps to assign sales reps to specific territories, optimize sales coverage, and monitor the performance of their teams. They can also use the tool to analyze data on sales activities, customer behaviour, and market trends to make informed decisions that drive business success.

Logistics Optimization

Companies that have delivery or service fleets can use Salesforce Maps to optimize routes, track drivers, and manage resources more efficiently. The tool provides real-time updates on the location of drivers, enabling managers to make changes to routes and schedules as needed.

Customer Service Enhancement

Companies that offer field service can use Salesforce Maps to improve response times and ensure that their right technicians are dispatched to the right location, and have all the information they need to complete the job on arrival.

Marketing Campaigns

Marketing teams can use Salesforce Maps to identify target markets, plan campaigns, and monitor the performance of their campaigns. The tool provides valuable data analytics insights, enabling marketers to make informed decisions on resource allocation and campaign optimization.

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If you've determined that Salesforce Maps could benefit your business operations, one of the first steps to take is to actually configure Salesforce Maps. Following these steps for installation will get you started on the right path:

Package Installation & Permission Set Assignment

After purchasing Salesforce Maps, the package installation link will be sent to your email. Install the package in your Salesforce org, and then assign the "Salesforce Maps" permission set license and the "SF Maps" permission set to users who require access to the package.

Setup a Marker Layer in Salesforce Maps

Once the package is installed, follow the below steps within the Salesforce Maps installed package:

Create Base Object

1. Click on 'Configure' in Salesforce Maps installed package
2. Select Base Object | Create New
3. Select the Salesforce object that you want to appear on maps
Example: You want to plot cases from high-revenue accounts, so you select Case
4. Enter a name and select an address location based on the corresponding Salesforce object or a related Salesforce record's ID, such as Account ID
Example: You want cases to reflect the address of their respective accounts—not the cases themselves. So you select Account ID.

The screenshot shows the 'Create New' configuration screen for a Base Object in Salesforce Maps. At the top, there are three tabs: 'Create New' (selected), 'Edit Existing', and 'Remove Existing'. Below the tabs, there is a 'Base Object' dropdown menu with 'Case' selected, and a checkbox labeled 'View All Salesforce Objects' which is unchecked. A section titled 'Base Object Details' contains several fields: 'Name' with the value 'Case Service Requests', 'Address Location' with a dropdown menu showing 'Account ID', 'Related Object' with the value 'Case', 'Record Type' with a dropdown menu showing '--All--', and 'Description' with the text 'High-revenue case resolution for on-site visits'.

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5. Choose the address and coordinate options that you want the maps to reference, such as standard or custom address fields. Save the changes

Example: you want field reps to see Account locations based on billing addresses, So you select Addresses and Coordinates from the Account Billing Address

The screenshot shows the 'Address Fields' and 'Coordinate Fields' configuration section. Under 'Address Fields', the following dropdowns are selected: Street (Billing Street), Postal Code (Billing Zip/Postal Code), City (Billing City), Country (Billing Country), and State (Billing State/Province). Under 'Coordinate Fields', the following dropdowns are selected: Latitude (Billing Latitude), Verified Latitude (Select an Option), Longitude (Billing Longitude), and Verified Longitude (Select an Option).

Perform Disposition on Map

In order to perform any action on the records plotted on the Map, custom actions can be created and placed in the appropriate button sets and permission groups.

Custom Action

With custom actions, reps can launch web pages, Lightning web components, and flows from Markers on the map.

1. Click on Configure in the Salesforce Maps installed package
2. Select the Settings tab and click on Custom Actions
3. Select Create. Then give your custom action button a name and select whether you want the button to appear on Selected Base Objects and on desktop and mobile apps

The screenshot shows the 'Custom Actions' configuration tab. It includes a 'Custom Actions' dropdown menu with '--Create--' selected. Below this, the 'Action Name' field is highlighted with an orange box and contains the text 'Show Account Contacts'. At the bottom, the 'Show Custom Actions On' section is highlighted with an orange box, showing three checkboxes: 'Selected Base Objects' (unchecked), 'Desktop' (checked), and 'Mobile' (checked).

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4. Add automation that saves your reps time and helps them comply with company policies

Example: Send your reps to a page when you add a URL in the free text field. Other options let you load a specific Lightning web component or trigger a flow within the custom actions window.

Processes and Automation

* Action
Launch Lightning Component

* Lightning Component
maps:DisplayAccountRecord

☒ Hide custom action header and footer

Save

Button Sets

Now, place the new custom actions in a Button set so that it will be visible to the end Users to perform dispositions on the Map. Button Sets hold all the standard/custom actions that should be accessible to the end Users to perform any dispositions.

1. Click on Configure in the Salesforce Maps installed package
2. Select the Settings tab and click on Button Set
3. Create a new Button Set and provide a name
4. Click and drag the custom actions that are created in the previous step
5. Save the new Button Set

Layouts

Available Buttons

Section	Set Reference Point	Add to Route	Add to Schedule	Add to New Route
Set Proximity Center	Remove Marker	Remove Marker	Take Me There	Set Verified Location
Add to Campaign	Change Owner	Send Email	Log a Call	New Task
New Event	Check In	Clear Coordinates	Chatter Post	Follow
Unfollow	Update Field	Set Favorite Location	Click2Create™	Street View
Knock Disposition	Request In-Person ...	Safety Guidelines		

▼ Popup

ACTIONS

Safety Guidelines	Set Proximity Center	Remove Marker
Add to Route	Add to Schedule	Check In
Take Me There		

ADMIN

Set Verified Location	Clear Coordinates	Change Owner
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ACTIVITIES

Log a Call	Send Email	New Event
	Add to Campaign	

▼ Mass Actions

ACTIONS

- > Add to Campaign
- > Change Owner
- > Update Field
- > Clear Coordinates
- > Remove Marker
- > Add to Route
- > Add to Schedule

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Permission Group

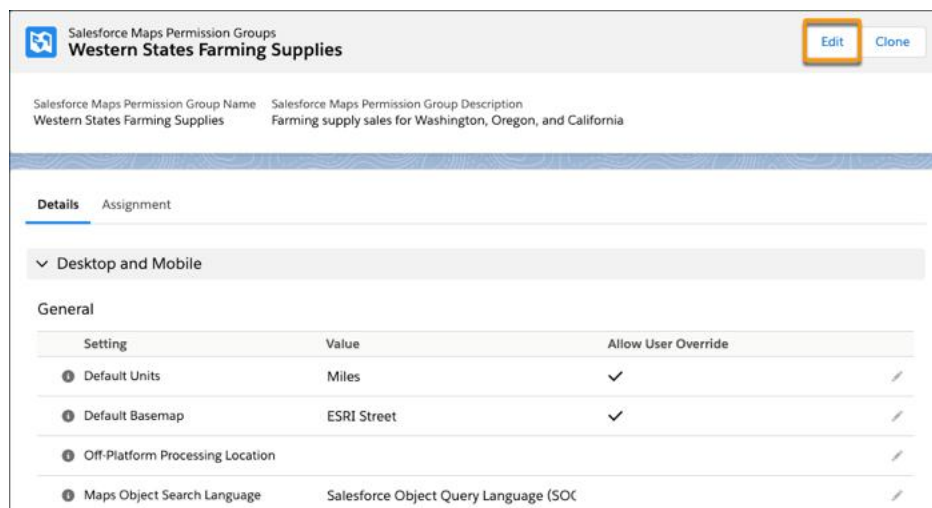
Assign the new button set to a Permission Group, which holds the permissions and access level for the end Users:

1. Click on configure in the Salesforce Maps installed package
2. Select Permission Groups and click on New



Permission Group	Description	Created By	Last Modified
Default	Default Permission Group	System	
Northeast Farming Equipment	Northeast reps for farming equ...	Pia Larson	Pia Larson - October 29th, 2020
Northwest Towing	Towing companies in the Pacifi...	Mary Allegri	Pia Larson - January 11th, 2021

3. Give your permission group a name and a description
4. Click Edit, then select the permissions that you want for your Users. Assign Users and profiles to the permission group



Salesforce Maps Permission Groups
Western States Farming Supplies

Salesforce Maps Permission Group Name: Western States Farming Supplies
Salesforce Maps Permission Group Description: Farming supply sales for Washington, Oregon, and California

Details | Assignment

▼ Desktop and Mobile

General

Setting	Value	Allow User Override
① Default Units	Miles	✓
① Default Basemap	ESRI Street	✓
① Off-Platform Processing Location		
① Maps Object Search Language	Salesforce Object Query Language (SOQ	

5. Assign the button set created in the previous step to the permission group and save the permission group

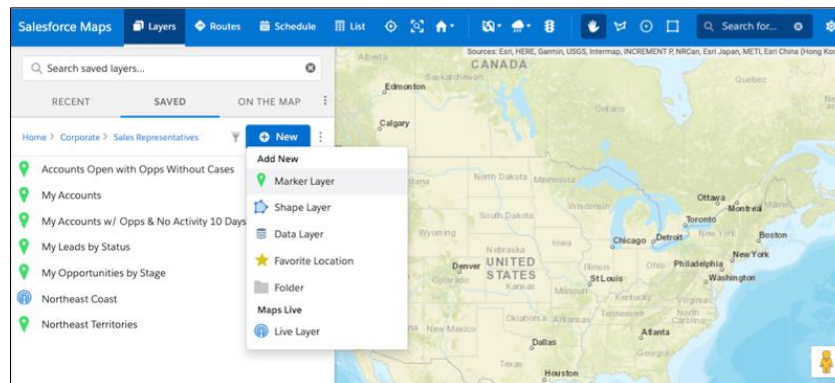
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Create Marker Layers

Determine what customer data to include on the map and how it appears so that managers and reps can find and service the records efficiently. Use the Salesforce Maps base object that is created in the previous step.

1. Navigate to Salesforce Maps from AppLauncher
2. Click on the 'Layers' tab and click on 'New'



3. Provide a name and description for the Marker Layer
4. Select the base object created in the previous step

Note: Before plotting the records on the Map, make sure the data to be loaded on the Map has the address fields populated. If that object doesn't have a standard address field, create a custom address field and import data so that it can be used in Salesforce Maps to plot the records on the Map.

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Now that you have set up all the basic configurations to plot a Marker Layer in Salesforce Maps, navigate to the Salesforce Maps Application from the App launcher and click on the 'Maps' tab. You will be able to see the marker layer you created. Plot the Marker Layer by clicking on it, and the records that satisfy the Marker Layer's criteria will be plotted on the map as shown below.

The screenshot displays the Salesforce Maps application interface. On the left, a sidebar shows a list of 'My Open Opportunities' with a legend field set to 'Stage'. The list includes various stages like Prospecting, Qualification, Needs Analysis, etc., with counts for each. The main map area shows a street view of Charlotte, NC, with several blue location pins plotted. A pop-up window for 'ACME Software' is open, displaying account details such as name, phone, amount, probability, and stage.

Stage	Count
Prospecting	47 of 47
Qualification	15 of 15
Needs Analysis	0 of 71
Value Proposition	0 of 19
Id. Decision Makers	0 of 24
Perception Analysis	0 of 17
Proposal/Price Quote	0 of 39
Negotiation/Review	0 of 23

ACME Software
1521 E 3rd St, Charlotte, NC 28204

Info Actions Chatter Weather

Account > Account Name: ACME
Account > Account Phone: 9567182849
Amount: \$1,419,041.00
Probability (%): 90
Stage: Prospecting

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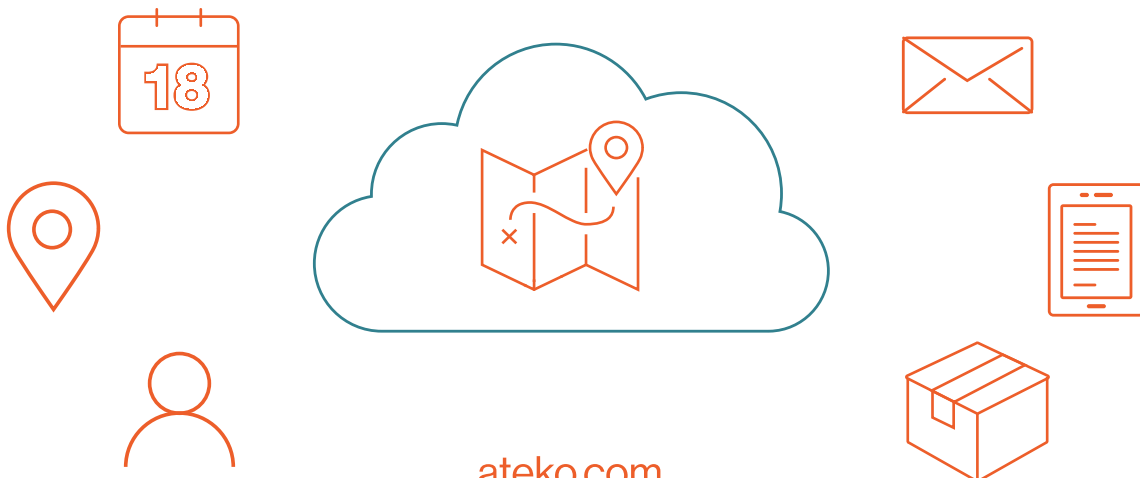
Conclusion

By enhancing sales processes, fostering team collaboration, and optimizing sales territories, Salesforce Maps helps organizations streamline their operations and improve overall sales performance. The geolocation and data visualization capabilities of Salesforce Maps provide valuable insights into customer and field data, enabling businesses to make informed decisions and tailor their strategies accordingly. It provides visual context to data which makes the data actionable.

By leveraging Salesforce Maps, businesses can unlock new opportunities, enhance productivity, and drive overall success in today's competitive market.

**Are you interested in learning how Ateko can help you
implement Salesforce Maps to enhance your business?**

Talk to us today!



ateko.com

1-800-878-4756 ext 202