Esri Maps for Salesforce and Microsoft Dynamics CRM
Daniel Lee, Lucy Guerra
Agenda

- CRM and Esri
- Esri Maps for…
- Demos
- Road Ahead
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CRM Systems are at the heart of a business
Service

Marketing

CRM

Sales
Happy Customers

Efficient Operations

Increased Profits
What happens when you add location to CRM?
It’s a match made in heaven…

Or the cloud

Or on-premises…
Sales and Sales Managers
• Where are my Opportunities? What stage are they in?
• What other Accounts/Leads are nearby so I can plan additional meetings when I’m traveling?
• How do I get to these locations?
• Where are my Accounts with no activity in the last 60 days?
• Where are my top performing accounts clustered?
• Which sales regions are performing well? Or not?
• Where are the gaps in coverage?
• Where are my competitors in relation to my customers?
Government
• What are the demographics around this park?
• How much of the land is wooded?
• Where are the permit applications?
• To which district does an event belong?
• Which parcels are in a hazard zone?
• How many residents are affected by a natural disaster?
• Which parts of the community are in need? Of services? Of resources?
• Where are citizen service requests in relation to infrastructure services and project work?
• Where should we distribute food and water in an emergency?
Esri Maps for… CRM Systems
Location Analytics | Core capabilities
Work Together | Securely Share Your Maps
CRM Apps

Microsoft Dynamics

Salesforce 1

ArcGIS Platform

Salesforce

Esri UC 2014 | Technical Workshop | Esri Maps for Salesforce and Microsoft Dynamics CRM
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Esri Maps for Dynamics CRM

• Support for:
  - Dynamics CRM 2011
  - Dynamics CRM 2013
  - Dynamics CRM Online

• Connect through ArcGIS Online or Portal
• Map Charts, Dashboards and analytics
• Locate Workflows
• Delivered/Installed as a Solution Package
Esri Maps for Salesforce

• Web Integration
  - Connect through ArcGIS Online
  - Dashboard maps and analytics
  - Locate Workflows
  - Delivered through the Salesforce AppExchange

• Mobile
  - Salesforce1 ready
  - View Salesforce Objects
  - Check-in
  - Delivered through the Salesforce AppExchange

Beta; Release to General Audience in Q3
Agenda

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Demo

Install and Configuration, Components, Overview
Bring Esri to Your World | Access Maps from inside your business systems
Components

- Settings
- Map Gallery
- Locate Workflow
- Configuration
- Data Templates (Salesforce only)
- Map Chart
Demo

Workflows & Data Enrichment
Spatially Enable Your Data

• Add location to your CRM records
  - Use address info or place names

• Enrich your Dynamics CRM data with location-based information
Spatially Enable and Enrich | Bring location into your data
Demo
Data Templates & Creating Maps
Map Visualization
Fresh Insight on your data

• Style and group based on attributes values
• Overlay your data on maps showing demographic and other location-based content
• Infographics that display rich contextual information on your locations
Map Visualization | Fresh insight on your data
Spatially enable objects with Data Templates
Deep Analysis
For Better Decision-Making

• Create reports on your location with rich demographic, lifestyle and other location based information
• Find statistically significant hot and cold spots
• Select and find nearby locations
• Heat maps to show point distribution
• Cluster location to find patterns
• Get routes between your locations
Deep Analysis | For better decision-making
Bi-Directional Interaction
From the business system to the map and back

- Select views to filter records displayed on the map
- Select records on the map to create personal views
- Select records on the map and view details
- Interact with records pane
Bi-directional Interaction
Tight Integration with Your Organization
Through ArcGIS online or Portal

• Use your organization’s base maps and default map
• Use custom geocoder
• Create custom locator
• Integrate with ArcGIS Server Feature & Map services
• Share maps and layers
Integration with existing GIS Infrastructure
Demo

AGOL Layer & Sharing Maps
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Roadmap – Esri Maps for Dynamics CRM

Feb 2014
Esri Maps for Dynamics CRM v1.0.1

Esri Maps for Dynamics CRM v.1.1
Q4 2014
Roadmap – Esri Maps for Salesforce

Q2 2014
Esri Maps for Salesforce (Web)
• Beta

Q3 2014
Esri Maps for Salesforce (Mobile)

Q3 2014
Esri Maps for Salesforce (Web)
• v.1

Q4 2014
v.Next
Thank you...

• Please fill out the session survey:

Offering ID: 1289

Online – www.esri.com/ucsessionssurveys
Paper – pick up and put in drop box