

XTIVIA, Inc.

Vicinity for Salesforce User Guide



XTIVIA



Vicinity for Salesforce

Our Mission

XTIVIA, Inc. offers expertise in CRM applications, business process optimization, and Sales Consulting services that allow clients to optimize their relationships with their customers. Our mission is to work with our customers to ensure the success of their CRM implementation.

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HOW TO USE VICINITY

Vicinity is a Salesforce1 ready application which provides users a fast, simple, cost effective way to locate nearby Leads, Accounts and Contacts within their Salesforce database.

Only address information is sent to the Vicinity service. Only latitude/longitude values are returned with the address information submitted. All data transmitted between your Salesforce organization and the Vicinity geocoding service is encrypted. No information from your Salesforce organization is stored in the Vicinity geocoding service.

Vicinity can be used from the **Account**, **Contact** or **Lead** screens or from the **Vicinity** tab. If using from the Account, Contact or Lead Detail, Vicinity will also map any other account, contact or lead within the nearby distance selected. Each search must be run independently of the other but will provide you with the driving directions needed by using Microsoft Bing mapping.

Vicinity also includes a stand-alone mapping feature, which allows you to graphically map any Account, Contact or Lead from a specific location, e.g. postal code.

The follow outlines how to use Vicinity from the Vicinity Detail. The functionality to execute Vicinity from Accounts, Contacts or Leads is identical.

The screenshot shows the Salesforce interface with the 'Vicinity' tab selected. The search filters are: Location: 'Another Location (below)', Distance to Search: '10 miles', Number of Results: '10', and Account Type: 'Customer'. The results table is as follows:

Distance	Name	Address	Account Type	Industry	Lead Source
1.79	[Redacted]	55 West Port Plaza, Suite 200 St. Louis MO United States	Customer	Retail/Consumer Goods	
1.93	[Redacted]	2081 Craig Road St. Louis MO United States	Customer	Manufacturing	
1.98	[Redacted]	11960 Westline Industrial Dr Suite 180 St. Louis MO United States	Customer	Healthcare/Medical /Pharmaceutical	
1.98	[Redacted]	11960 Westline Industrial Drive Suite 180 St. Louis MO United States	Customer	Healthcare/Medical /Pharmaceutical	

The following are options for the search.

1. **Distance to Search** - The distance (radius) for the search in miles. Options include 1, 5, 10, 25, 50, 100, 250, and 500. Other values can also be entered in this field manually (i.e. 37, 64).
2. **Location** - The starting point for the search. Valid options are **Another Location**, **My Office**, **My House**, and any other point of interest defined by the system administrator, e.g., City and State.
3. If **Another Location** is chosen, a valid zip code must be entered for the starting point of the search.
4. **Number of Results** - The number of contacts to return in the search. Valid options are All, Top 10, Top 25, Top 50, Top 100, Top 250, and Top 500. If one of the Top *n* options is chosen, the restriction is made by distance, from closest to farthest from the center point of the search.
5. **Account Type** - This option allows the user to filter the contacts by type. Valid options are "All" or any of the types defined in the Account Type picklist in your system.

Buttons

Search – this button will execute the search. The results will be shown in the grid, sorted from closest to farthest.

Assign Topic – this option allows the user to create an assign topic to the search results list.

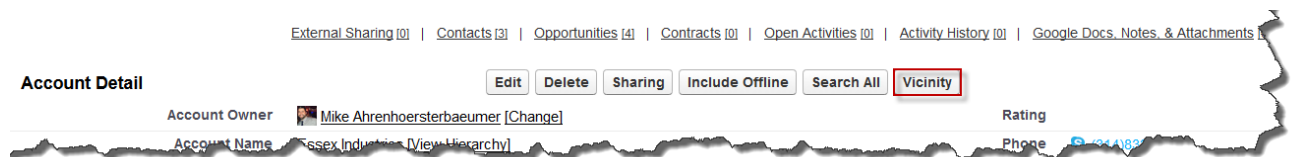
Display Map – clicking this button will open your search results list in a Bing Map view.

Refresh Picklists - this button will clear the results and return the picklist boxes to their default settings allowing for another search.



From Account Detail Vicinity Searches

1. From the Account detail click on the **Vicinity** button. The Vicinity tab will open.



2. Select the parameters for **Distance to Search** and **Number of Results**.
3. Click **Search**. The search results will display in the table below.

These columns can be resized and sorted.

Vicinity Find what's nearby...

Location:

Distance to Search: Number of Results:

Accounts Contacts Leads

Account Type: (All) Industry: (All) Lead Source: (All)

Distance	Name	Address	Account Type	Industry	Lead Source
0	Intuitive Web Solutions	509 W Olive, Suite 101 Springfield, MO, United States	Customer	Software	
3.25	Bass Pro Shops Inc.	2500 E. Kearney Springfield, MO, United States	Xtivia - Active Customer	Sporting & Recreational Equipment Retail	ISR



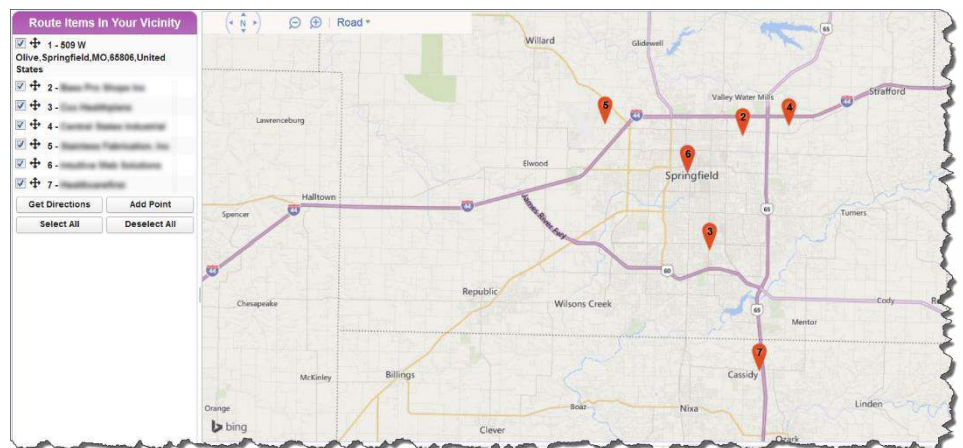
Note

If the address has a Suite, Building or Room number on the address line you will need to remove it prior to searching, otherwise you will get a pop-up message advising you that Vicinity was unable to geocode the location. Simply remove the information and try your search again.

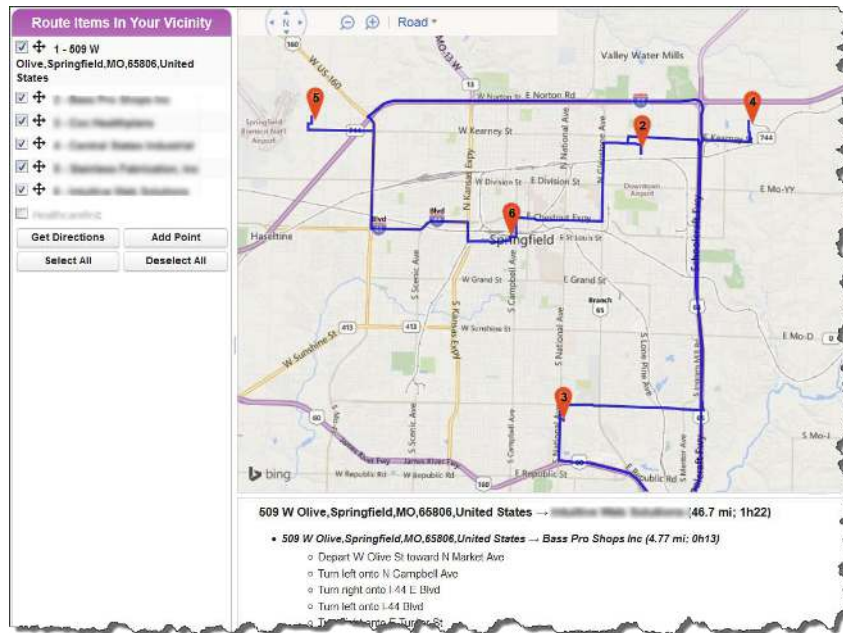
Unable to geocode this location.
Please check your formatting and try again.

Acceptable Address Formats:
Postal Code
Street Address, Postal Code
Street Address, City, State/Province
Street Address, City, State/Province, Postal Code
Street Address, City, State/Province, Country, Postal Code.

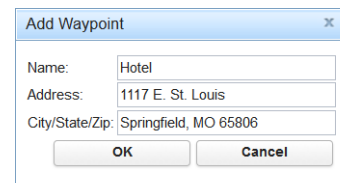
- To map the results click on the **Display Map** button and Vicinity will plot the results on a map, which will open in a new browser tab window. Please be sure to allow popups on Salesforce.



- By clicking on the **Get Directions** button a route will be populated based on the search results. You have an option to unclick a box next to the account, contact or lead to not include it in your directions.



- a. You also have an option of *sorting* your map points by selecting a route item and dragging it to up or down in the order you wish to have directions.
6. An ad-hoc location can be added by clicking on **Add Point**. This will open a screen allowing you to add a starting point, e.g. Hotel or any other address to map.
7. Click **OK** and the waypoint will be added to your map. The waypoint will not be saved once you close the map.



Since the map results show in **Bing Maps**, it allows you to view the map by road or bird's eye view.

POINT OF INTEREST

The **Point of Interest** object allows Administrators and/or Users (depending on Permissions) to add major cities, airports, home locations, etc. that will appear as options in the Location pick-list.

Points of interest make it easier for you to run searches. By populating your Points of Interest you will have a list of your most popular starting points.

Examples include:

- Hotels in cities you visit
- Attractions – Disney World, Universal Studios
- Military Bases – Fort Bragg, Camp Pendleton
- Educational Institutions – University of Michigan, Stanford

These points of interest show up as the first starting point on the map for your search results

Adding a Point of Interest:

1. On the Proximity Search tab menu, click **New**. The New Point of Interest screen will open.
2. Add the Name, Address, City, State and Zip Code and click **Save**. Your Point of Interest will now be available in your **Location** drop-down.

