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# Salesforce Maps

Salesforce, Spring '24





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# SALESFORCE MAPS

Increase customer conversions, improve revenue, and drive pipeline and lead generation. Help field reps plan for customer visits when they spend less time on the road and more time building relationships. Design strategic sales and service territories that integrate with Salesforce and external systems.

## [Salesforce Maps for Field Reps](#)

Spend more time building customer relationships and less time on the road. Salesforce Maps help you sell to and serve customers better, optimize schedules and routes for in-person and virtual visits, and find new business.

## [Salesforce Maps for Managers and Administrators](#)

Get your sales and service teams to spend more time building customer relationships and less time on the road. Salesforce Maps and Salesforce Maps Advanced help your teams sell to and serve more customers in less time and optimize routes for in-person visits.

## [Get Technical Support for the Salesforce Maps Portfolio](#)

Remove roadblocks and reduce downtime when you route your requests directly to support engineers who specialize in Salesforce Maps, Salesforce Maps Advanced, and Territory Planning.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Salesforce Maps for Field Reps

Spend more time building customer relationships and less time on the road. Salesforce Maps help you sell to and serve customers better, optimize schedules and routes for in-person and virtual visits, and find new business.

## [Visiting More Customers in Less Time](#)

Increase sales when you build and maintain customer relationships based on optimized account visits. Improve sales productivity by acting on specific accounts directly from the legend in Salesforce Maps. Fill gaps in schedules with nearby opportunities and create efficient routes.

## [Finding New Business Using Salesforce Maps Data](#)

Meet and exceed management's sales and service goals as you generate leads and discover untapped and underserved markets. Expand into new locations, identify who can benefit from your products and services, and fill scheduling gaps while you're on the road. Salesforce Maps provides property, business, and demographic data that gives you a competitive advantage for crushing sales and service goals.

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## Visiting More Customers in Less Time

Increase sales when you build and maintain customer relationships based on optimized account visits. Improve sales productivity by acting on specific accounts directly from the legend in Salesforce Maps. Fill gaps in schedules with nearby opportunities and create efficient routes.

### [Plan Visits and Perform Actions for Multiple Records Simultaneously](#)

Meet and exceed customer expectations with timely visits scheduled for multiple accounts at a time. Manage records in a marker or polyline layer using mass actions conveniently from the plotted legend in Salesforce Maps. Determine which accounts to take action on while viewing them on the map. Marker colors and shapes update immediately when you initiate single or mass action changes.

### [Visualize and Set the Focus for Records That Require Attention](#)

Select key records on the map and perform mass actions for them from a list that appears in the legend. Identify records using shape, color, and opacity options that keep you focused on what's important now in Salesforce Maps.

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Meet and exceed customer expectations with timely visits scheduled for multiple accounts at a time. Manage records in a marker or polyline layer using mass actions conveniently from the plotted legend in Salesforce Maps. Determine which accounts to take action on while viewing them on the map. Marker colors and shapes update immediately when you initiate single or mass action changes.

1. Open a marker or polyline layer.
2. Display markers according to the field you want to work with, such as industry or annual revenue.
3. Right-click a marker row. The row you click is highlighted for easy identification. Actions you take on that marker apply to all records included within it.

#### EDITIONS

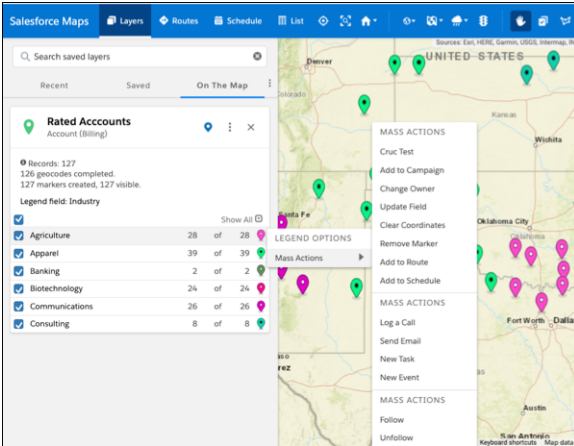
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#### USER PERMISSIONS

To access Salesforce Maps:

- Salesforce Maps



## Visualize and Set the Focus for Records That Require Attention

Select key records on the map and perform mass actions for them from a list that appears in the legend. Identify records using shape, color, and opacity options that keep you focused on what's important now in Salesforce Maps.

1. Open a marker or polyline layer.
2. Click **Select Markers**, and then select markers using Ctrl key shortcuts.

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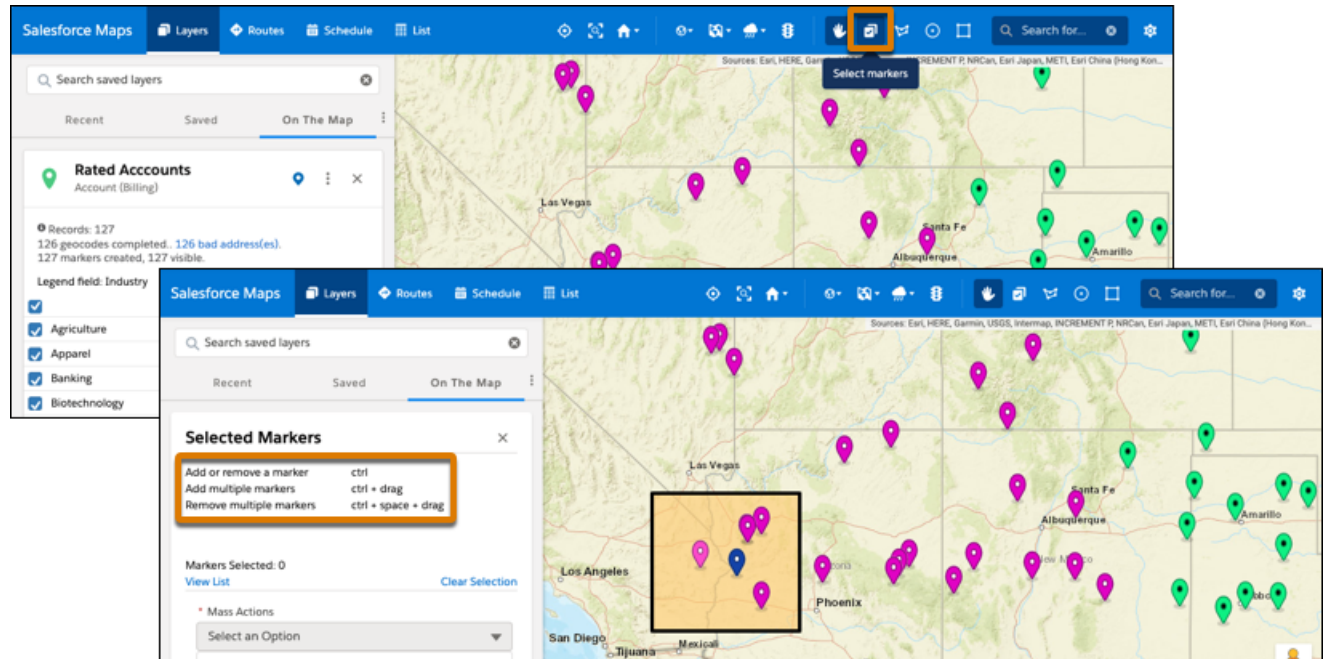
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3. View the list of records and select an action that you want to take.
4. Set appearance options so that you identify selected records and reduce opacity for unselected ones.

## Finding New Business Using Salesforce Maps Data

Meet and exceed management's sales and service goals as you generate leads and discover untapped and underserved markets. Expand into new locations, identify who can benefit from your products and services, and fill scheduling gaps while you're on the road. Salesforce Maps provides property, business, and demographic data that gives you a competitive advantage for crushing sales and service goals.

### [Types of Data That Broaden Your Reach](#)

Gain insight into markets that can benefit from your products and services directly in Salesforce Maps. Rely on trusted property, business, and demographic data from providers such as ATTOM and DatabaseUSA.com.

### [Examples of Growing Your Business Using Salesforce Maps Data](#)

Generate leads, accounts, and opportunities using the property, business, and demographic data available in Salesforce Maps. Draw inspiration from real-world examples, and adapt them for your own business requirements. For added context, overlay other available data including ArcGIS weather trends.

### [Requirements for Using Salesforce Maps Data](#)

Get access to Salesforce Maps and its data, set your goals, and interpret the data on the map. Later, you generate leads or accounts from that data and determine whether marketing campaigns can help you and your team reach your goals.

### [Considerations for Using Salesforce Maps Data](#)

Set your expectations for working with property, business, and demographic data. Salesforce Maps data comes from numerous, trusted data providers such as ATTOM and DatabaseUSA.com.

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### Generating Leads and Identifying New Markets on a Map

Sell to and provide services for property owners and businesses. Generate leads in Salesforce using property and business data without time-consuming data entry. Determine which locations meet your demographic requirements for business expansions and recruitment efforts in Salesforce Maps.

## Types of Data That Broaden Your Reach

Gain insight into markets that can benefit from your products and services directly in Salesforce Maps. Rely on trusted property, business, and demographic data from providers such as ATTOM and DatabaseUSA.com.

When you plot data from trusted data sources on a map, you increase your chances of reaching and exceeding your sales and service targets. Choose from property, business, and demographic data that helps you determine where to focus your efforts.

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Available Data	Examples of What's Included
Property	<ul style="list-style-type: none"> <li>• Property owners and their mailing addresses</li> <li>• Numbers of rooms</li> <li>• Loan positions and outstanding balances</li> <li>• Material compositions, HVAC systems, and property features</li> <li>• Property tax assessments</li> </ul>
Business	<ul style="list-style-type: none"> <li>• Company details such as employee count, contact names, phone numbers, and mailing addresses</li> <li>• Estimated business expenses for utilities, rent, legal services, and office equipment</li> <li>• Industry codes</li> <li>• Totals and ranges for annual sales</li> </ul>
Demographic	<ul style="list-style-type: none"> <li>• Income brackets</li> <li>• Age ranges</li> </ul>

Available Data	Examples of What's Included
	<ul style="list-style-type: none"> <li data-bbox="391 260 613 285">• Levels of education</li> </ul>

## SEE ALSO:

[Fields for Business Data \(USA\)](#)

[Fields for Property Data \(USA\)](#)

## Examples of Growing Your Business Using Salesforce Maps Data

Generate leads, accounts, and opportunities using the property, business, and demographic data available in Salesforce Maps. Draw inspiration from real-world examples, and adapt them for your own business requirements. For added context, overlay other available data including ArcGIS weather trends.

### [Property Data Examples](#)

Branch into new areas and find customers who identify with your goods and services when you focus on owners of properties that have certain characteristics using Salesforce Maps property data. Add potential business opportunities to Salesforce as prospecting accounts.

### [Business Data Examples](#)

Focus on prospective customers nearest to your established ones. Find businesses with specific characteristics and fill gaps in schedules while you're on the road using Salesforce Maps business data. Add business prospects to Salesforce as prospecting accounts or leads.

### [Demographic Data Examples](#)

Expand your business into untapped and underserved communities and diversify your recruiting efforts among key populations using Salesforce Maps demographic data. Concentrations of your search results appear on a map and help you identify where to focus your energy.

## Property Data Examples

Branch into new areas and find customers who identify with your goods and services when you focus on owners of properties that have certain characteristics using Salesforce Maps property data. Add potential business opportunities to Salesforce as prospecting accounts.

In Salesforce Maps, create data layers using property data from ATTOM and filters that you define. Complement your prospecting efforts when you include helpful details for contacting property owners in marker popups. For example, include owner names, addresses, and any other relevant details.

### EDITIONS

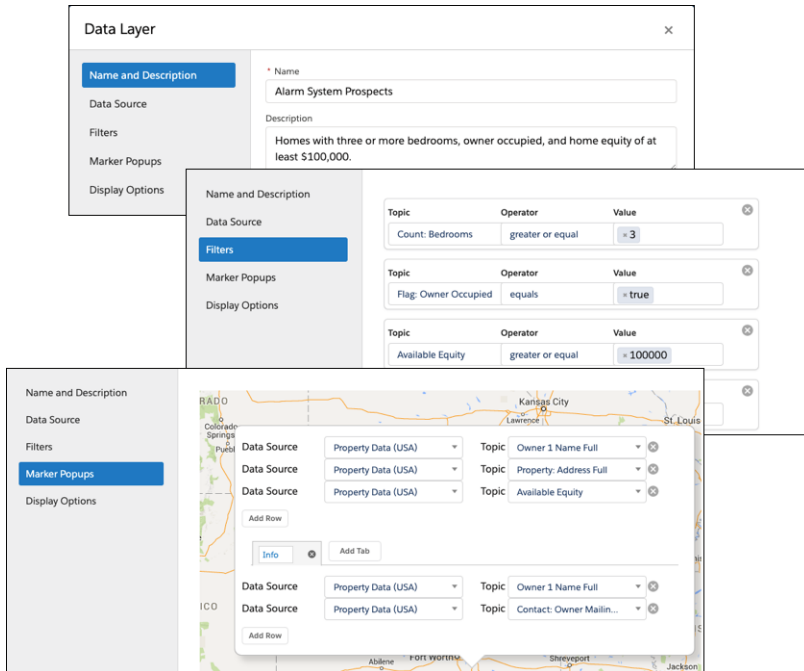
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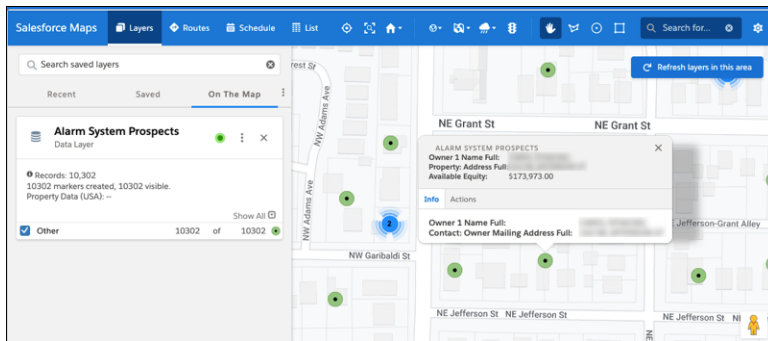
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Plot the data layer on the map, which shows properties based on the filters that you defined. After you identify prospects, choose whether to create prospecting accounts in Salesforce or add those prospects to your schedule and routes.



These examples illustrate how different businesses can use property data available in Salesforce Maps for identifying new sales and service prospects.

Example	Property Data That Helps Identify New Prospects
Expand into new geographic areas and markets	An alarm systems company explores options for branching into other territories. The company identifies properties with: <ul style="list-style-type: none"> <li>• At least three bedrooms</li> <li>• Owner occupancy</li> <li>• Available home equity greater than \$100,000</li> </ul>
Identify customers who need your products and services	A landscaping company digs for nearby prospects whose properties match criteria that includes properties: <ul style="list-style-type: none"> <li>• Whose lot square footage is greater than 10,000</li> </ul>

Example	Property Data That Helps Identify New Prospects
	<ul style="list-style-type: none"> <li>• Within specific postal codes</li> <li>• Categorized as commercial or residential</li> </ul>
Market to specific property owners	<p>A roofing contractor provides roofing repairs to a community recently struck by hailstorms. An ArcGIS data layer shows affected areas on the map. The properties in those areas that result in the best leads include ones with:</p> <ul style="list-style-type: none"> <li>• Roofing materials consisting of wood shake, ceramic tiles, and composition shingles</li> <li>• Available home equity greater than \$200,000</li> <li>• Square footage of at least 1,000</li> </ul>

### Business Data Examples

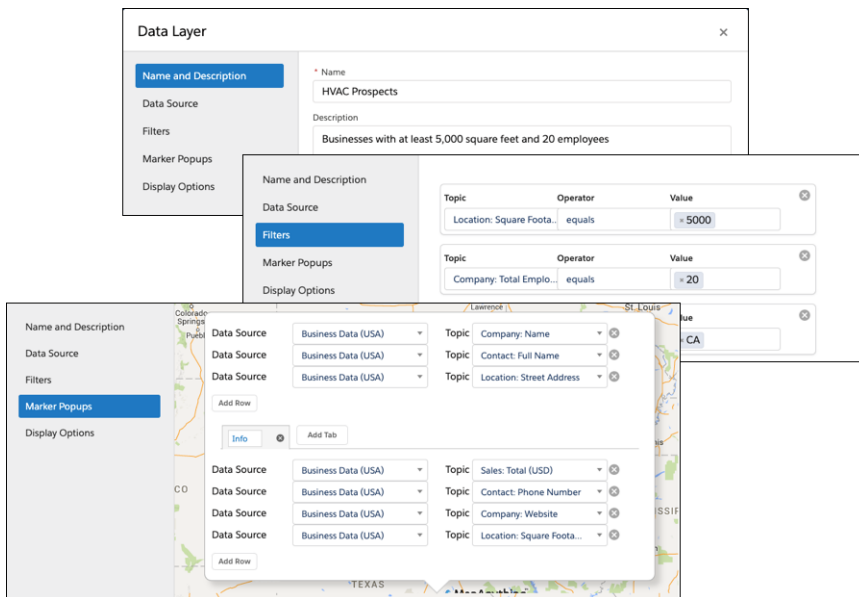
Focus on prospective customers nearest to your established ones. Find businesses with specific characteristics and fill gaps in schedules while you're on the road using Salesforce Maps business data. Add business prospects to Salesforce as prospecting accounts or leads.

In Salesforce Maps, create data layers using business data from DatabaseUSA.com and filters that you define. Complement your prospecting efforts when you include helpful details for contacting business contacts in marker popups. For example, include contact names, addresses, and any other relevant details.

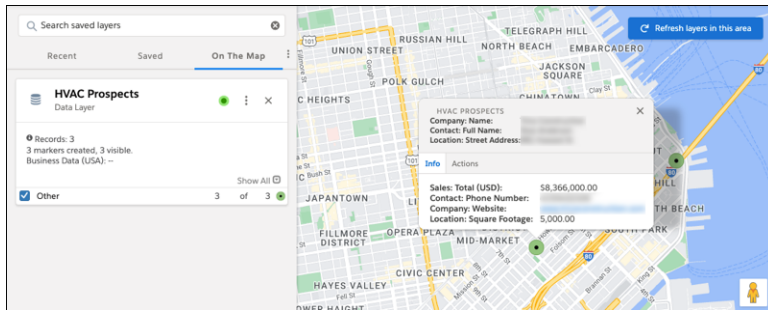
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Plot the data layer on the map, which shows businesses based on the filters that you defined.



After you identify prospects, choose whether to create leads or prospecting accounts in Salesforce, or add those prospects to your schedule and routes.

These examples illustrate how different businesses can use business data available in Salesforce Maps for identifying new sales and service prospects.

Example	Business Data That Helps Identify New Prospects
Sell to businesses closest to your established customers	A property management company wants to grow their business in nearby industrial parks. Businesses that the company’s leadership wants to focus on include: <ul style="list-style-type: none"> <li>• Specific words in their company names, NAICS codes, and SIC codes</li> <li>• At least 10 employees at the corporate level</li> </ul>
Identify buildings by size, business type, and layout	An emerging HVAC contracting firm identifies potential sales and service opportunities for businesses with: <ul style="list-style-type: none"> <li>• Square footage of at least 5,000</li> <li>• At least 20 employees</li> <li>• Business types that include specific NAICS codes</li> </ul>
Fill scheduling gaps along your route	A sales rep for a medical supply company makes the most of her route and identifies nearby businesses: <ul style="list-style-type: none"> <li>• That include specific words in their company names, NAICS codes, and SIC codes</li> <li>• Whose offices are within a 15-mile radius of her location</li> </ul>

### Demographic Data Examples

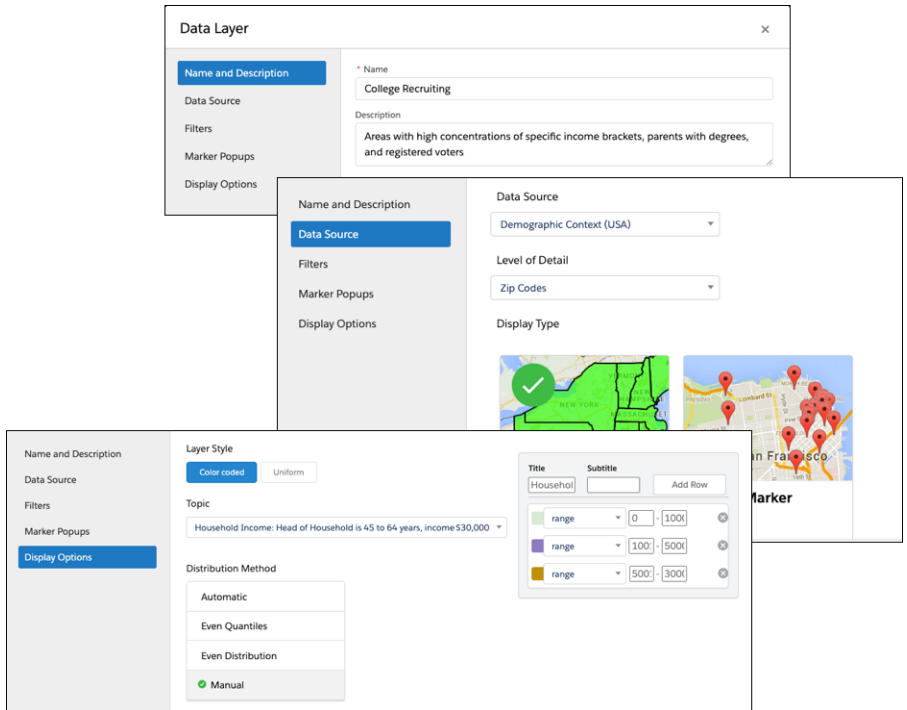
Expand your business into untapped and underserved communities and diversify your recruiting efforts among key populations using Salesforce Maps demographic data. Concentrations of your search results appear on a map and help you identify where to focus your energy.

In Salesforce Maps, you create data layers using the Demographic Context (USA) data source and filters that you define.

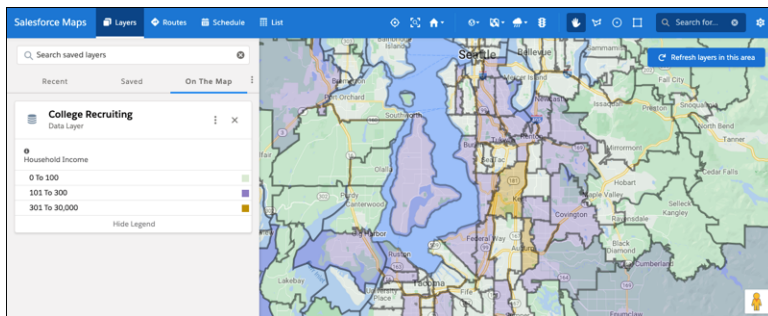
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Plot the data layer on the map, which shows concentrations of households who earn income based on the display options that you specify.



After you identify concentrated areas, determine where to focus your efforts.

These examples illustrate how different institutions and businesses can use demographic data available in Salesforce Maps for identifying populations and areas of interest for business and recruitment expansion.

Example	Demographic Data That Helps Identify Populations and Areas of Interest
Diversify your recruiting efforts	<p>A college wants to increase applications in lower socioeconomic areas. Factors that matter to the college board include:</p> <ul style="list-style-type: none"> <li>• Annual household income</li> <li>• Children by age range</li> <li>• Graduation rates among parents</li> </ul>

Example	Demographic Data That Helps Identify Populations and Areas of Interest
Provide products and services to underserved communities	A regional agricultural supply company considers expanding to another location within an 80-mile radius of its flagship store. The company’s leadership considers ZIP codes and: <ul style="list-style-type: none"> <li>• Annual household income up to \$70,000</li> <li>• Household size</li> <li>• People employed in agriculture and related trades</li> </ul>
Identify specific populations	A residential care provider investigates locations for opening a facility in a county that has high concentrations of: <ul style="list-style-type: none"> <li>• People age 75–84</li> <li>• Households earning at least \$72,000 annually</li> </ul>

## Requirements for Using Salesforce Maps Data

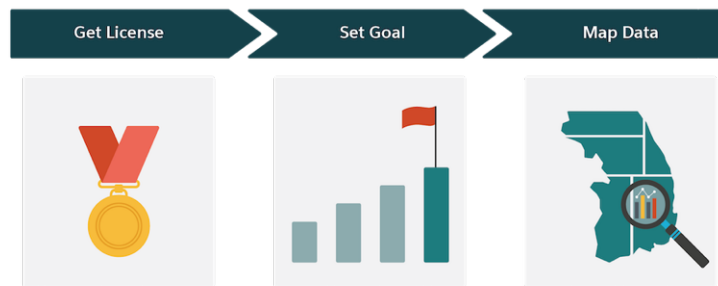
Get access to Salesforce Maps and its data, set your goals, and interpret the data on the map. Later, you generate leads or accounts from that data and determine whether marketing campaigns can help you and your team reach your goals.

When you plot data from trusted data sources on a map, you increase your chances of reaching and exceeding your sales and service targets. Choose from property, business, and demographic data that helps you determine where to focus your efforts.

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What to do	How?
Get License	If you don’t have a license for Salesforce Maps, discuss your options with a Salesforce account executive. Your account executive can help you determine whether it makes sense for you to purchase: <ul style="list-style-type: none"> <li>• Salesforce Maps as an add-on to Sales Cloud, Service Cloud, or an industry-specific offering such as Financial Services Cloud, Healthcare Cloud, or Manufacturing Cloud</li> <li>• Retail Execution in Consumer Goods Cloud, which comes standard with Salesforce Maps</li> </ul>

What to do	How?
Set Goal	<p>Develop a healthy pipeline of prospects that supplements your regular lead sources. Using Salesforce Maps data, you can create leads or accounts for the properties and businesses that you want to pursue.</p> <p>If you're looking to expand your business into or recruit from untapped and underserved markets, determine which population characteristics are more likely to respond to your offerings. For example, you want to focus on counties with high populations and concentrations of households earning income within specific brackets.</p>
Map Data	<p>Create data layers that you plot in Salesforce Maps. When you identify the data that represents the properties and businesses that you want to pursue, you create leads using Click2Create in Salesforce Maps.</p> <p>If you're working with demographic data, you visualize areas on the map that offer greater potential for expanding your business or recruiting talent efficiently.</p>

## SEE ALSO:

[Salesforce Help: Retail Execution at Your Fingertips](#)

## Considerations for Using Salesforce Maps Data

Set your expectations for working with property, business, and demographic data. Salesforce Maps data comes from numerous, trusted data providers such as ATTOM and DatabaseUSA.com.

When you...	Keep in mind that...
Consider purchasing Salesforce Maps licenses	<p>Salesforce Maps is available at an extra cost with a variety of Salesforce offerings. For example:</p> <ul style="list-style-type: none"> <li>• Sales Cloud</li> <li>• Service Cloud</li> <li>• Retail Execution, which includes Salesforce Maps</li> <li>• Other industry-specific offerings such as Financial Services Cloud, Healthcare Cloud, and Manufacturing Cloud</li> </ul> <p>Discuss your options with your Salesforce account executive.</p>
Work with property and business data	<p>If you import the data into Salesforce:</p> <ul style="list-style-type: none"> <li>• Some of that data doesn't include email addresses. You can investigate likely usernames and domain names for the property owners and businesses that you want to contact.</li> <li>• You choose between creating leads or accounts using Click2Create in Salesforce Maps.</li> <li>• You can manage and prevent duplicate data in Salesforce. Your Salesforce admin can confirm whether duplicate management is turned on.</li> </ul>

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When you...	Keep in mind that...
Troubleshoot data issues	<p>The property, business, and demographic data available in Salesforce Maps can vary among providers and your sources. If you identify inaccurate data:</p> <ul style="list-style-type: none"> <li>• Salesforce Customer Support can investigate potential data issues. If an issue originates in Salesforce Maps, the Salesforce Maps product team can schedule its resolution.</li> <li>• Salesforce can work with the data providers to correct inaccuracies. But Salesforce can't control whether or when providers resolve any of their inaccuracies.</li> </ul>

## Generating Leads and Identifying New Markets on a Map

Sell to and provide services for property owners and businesses. Generate leads in Salesforce using property and business data without time-consuming data entry. Determine which locations meet your demographic requirements for business expansions and recruitment efforts in Salesforce Maps.

### [Explore Sales and Service Opportunities Among Property Owners](#)

Identify properties that can benefit from your products and services using trusted property data from ATTOM. Get insight on issued permits, loan positions and balances, and property features and characteristics. Focus on specific cities and neighborhoods on a map using Salesforce Maps data.

### [Promote Your Products and Services to Businesses](#)

Provide sales and services to businesses near your established customers. Focus on specific industries and locations using trusted US and Canadian business data from DatabaseUSA.com that you plot in Salesforce Maps.

### [Branch into Untapped and Underserved Markets](#)

Determine the best markets for expanding your business, diversify recruiting efforts based on specific demographics, and focus your sales and service efforts among key populations. Visual indicators on a map show where you can concentrate your search for new business opportunities and talent using demographic data in Salesforce Maps.

## Explore Sales and Service Opportunities Among Property Owners

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1. Click **Layers > Saved > Personal > New > Data Layer**.

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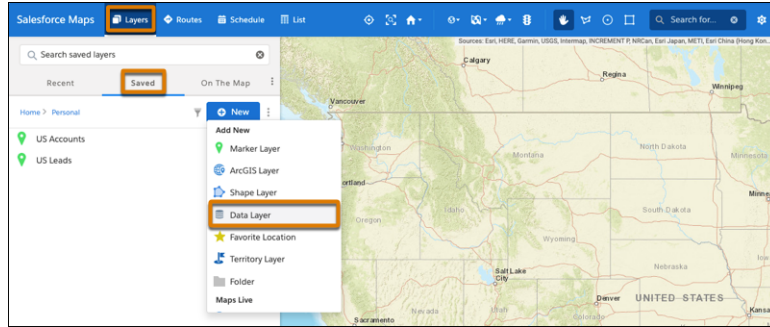
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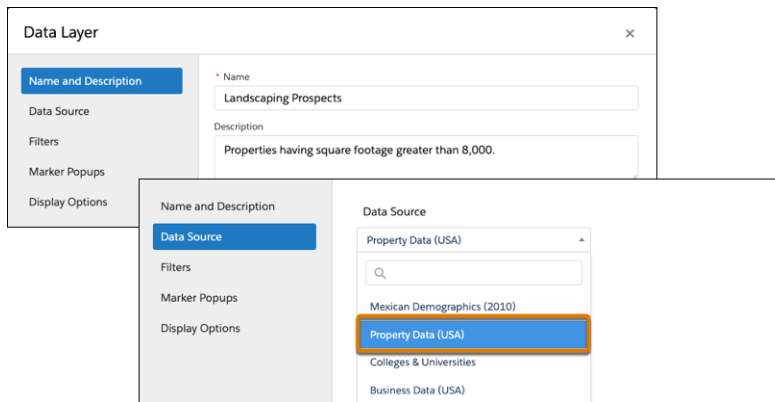
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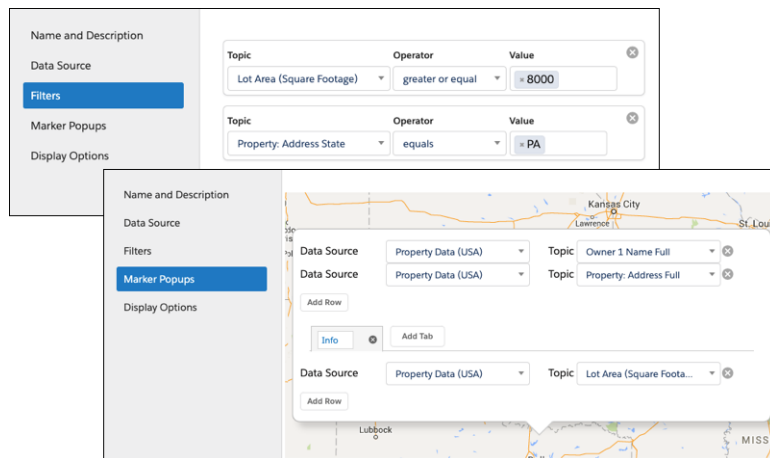
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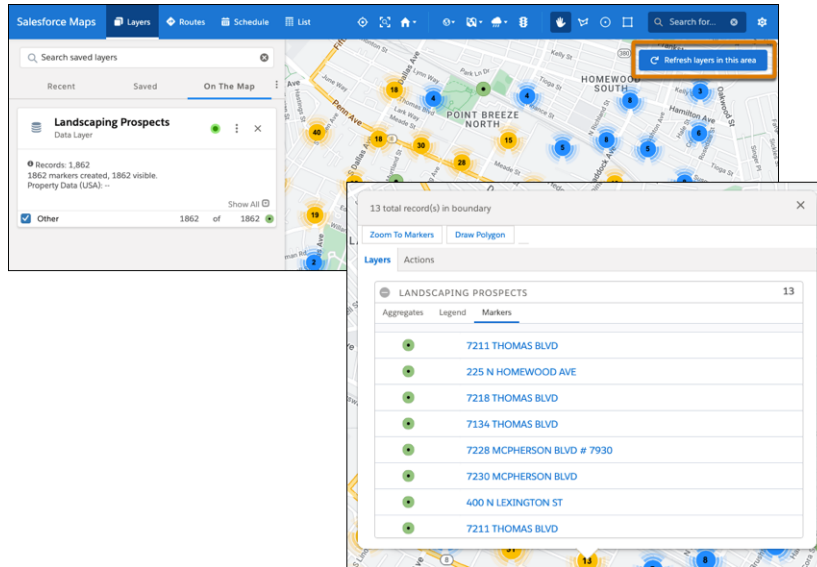
2. Enter a name and a description for your data layer. Select the data source **Property Data (USA)**.



3. Add filters so that you focus on specific property characteristics and locations. Then specify the details that you want to appear in marker popups, such as names, addresses, and property characteristics.

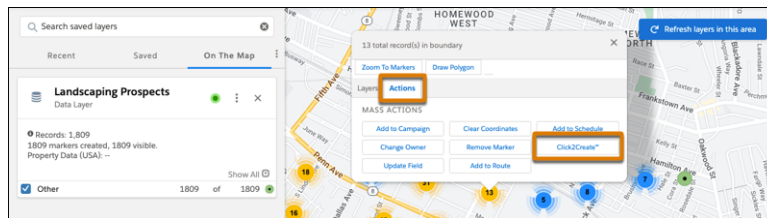


4. Save your work, and then plot the data layer. Zoom to the area where you want to focus your efforts, and then refresh the layer for that area.



Markers that represent individual and clusters of properties appear. When you select any marker, you get access to details for the properties represented in that marker.

- To create leads for properties, click a marker, select **Actions**, and then click **Click2Create**. If you don't have access to Click2Create, ask your Salesforce admin for help.



## Promote Your Products and Services to Businesses

Provide sales and services to businesses near your established customers. Focus on specific industries and locations using trusted US and Canadian business data from DatabaseUSA.com that you plot in Salesforce Maps.

- Click **Layers > Saved > Personal > New > Data Layer**.

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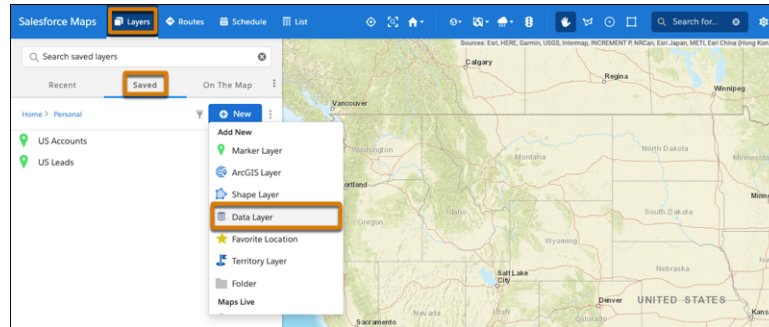
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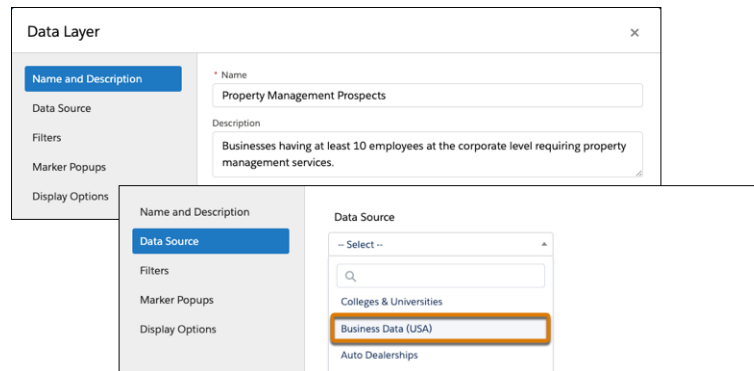
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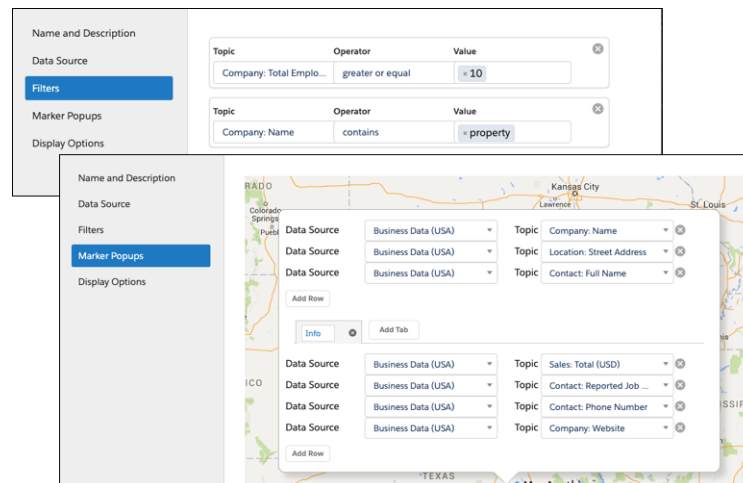
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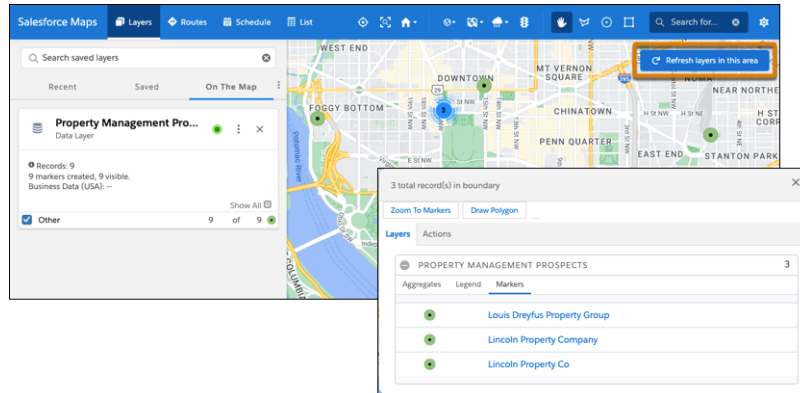
2. Enter a name and a description for your data layer. Select the data source **Business Data (USA)**.



3. Add filters so that you focus on specific property characteristics and locations. Then specify the details that you want to appear in marker popups, such as contact names, addresses, and business characteristics.

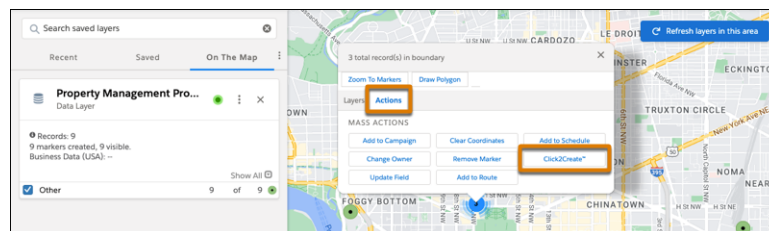


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## Branch into Untapped and Underserved Markets

Determine the best markets for expanding your business, diversify recruiting efforts based on specific demographics, and focus your sales and service efforts among key populations. Visual indicators on a map show where you can concentrate your search for new business opportunities and talent using demographic data in Salesforce Maps.

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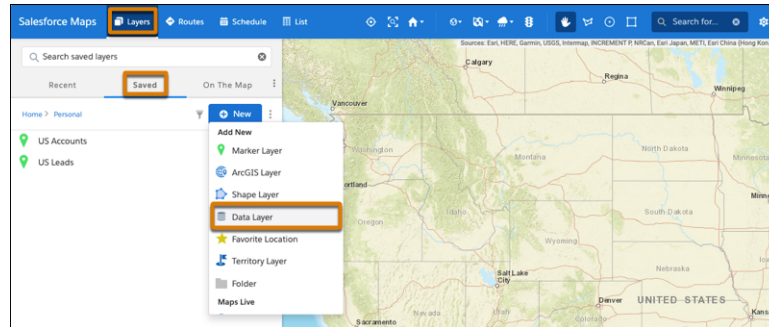
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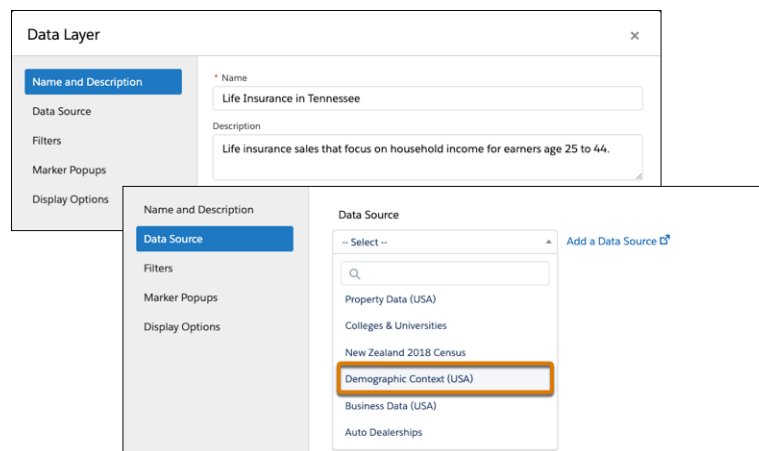
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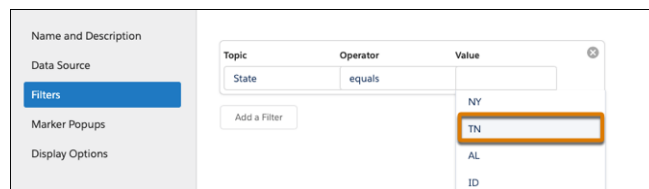
- Salesforce Maps



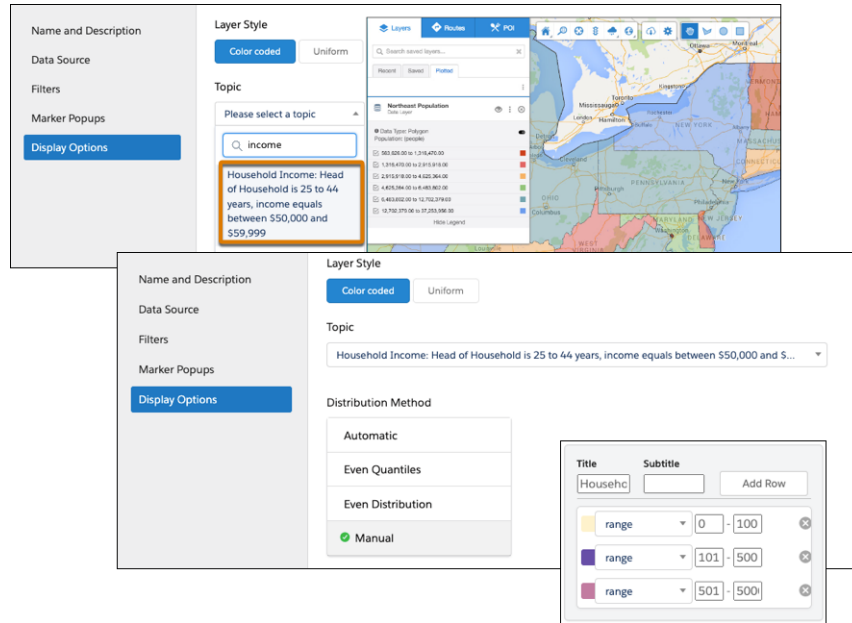
2. Enter a name and a description for your data layer. Select the data source **Demographic Context (USA)**, and then select the level of detail that you want to appear on the map such as neighborhoods or ZIP codes.



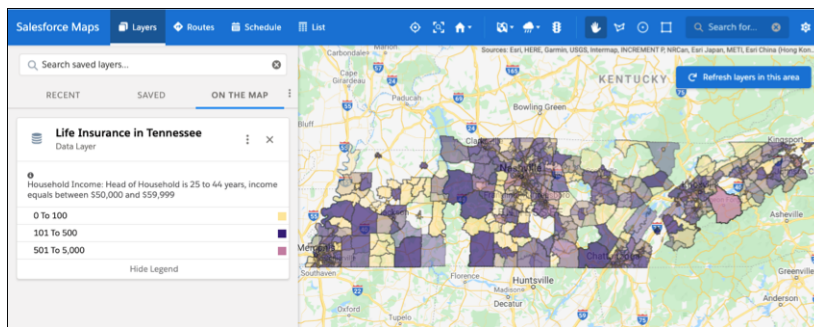
3. Add a filter so that you focus on a specific area such as a state or a county.



4. Add styles that help you differentiate areas that represent greater opportunities than others. For example, you want to focus on ZIP codes where the most households earn between \$50,000 and \$59,999. To show you where to focus your energy, you set ranges and corresponding colors that show concentrations of households earning income based on your selection.



5. Save your work, and then plot the data layer. Zoom to the areas where you want to focus your efforts.



## Salesforce Maps for Managers and Administrators

Get your sales and service teams to spend more time building customer relationships and less time on the road. Salesforce Maps and Salesforce Maps Advanced help your teams sell to and serve more customers in less time and optimize routes for in-person visits.

### [Salesforce Maps Setup](#)

Prepare field reps for improved efficiencies and higher profits. Set up features to help your reps maximize selling and service time, and optimize routes.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### [Salesforce Maps Advanced Setup](#)

Reduce the time that sales and service managers and their reps spend planning customer visits. Automate schedules and routes for your reps as far out as three months. The visit plans that you create get your teammates facing more customers and driving fewer miles.

#### SEE ALSO:

[Salesforce Maps](#)

[Salesforce Maps Developer Guide](#)

## Salesforce Maps Setup

Prepare field reps for improved efficiencies and higher profits. Set up features to help your reps maximize selling and service time, and optimize routes.

### [Installing and Giving Access to Salesforce Maps](#)

Take the initial steps to help your field reps spend less time on the road and more time building relationships with customers.

### [Controlling What Appears on Maps](#)

Determine which objects and data that your reps can plot on the map in Salesforce Maps. Set up and organize a folder structure for sharing layers or keeping them private among specific reps.

### [Keeping Field Reps Safe During Customer Visits](#)

Help your sales and service reps and their customers minimize the risk of exposure to COVID-19. Your reps request manager approval for on-site customer visits directly in Salesforce Maps. When your reps arrive at and depart from approved, in-person customer visits, prompt your reps to review and respond to your company's safety guidelines.

### [Simplifying and Automating Processes for Field Reps](#)

Help field reps spend less time tending to administrative duties and more time cultivating customer relationships using Salesforce Maps.

### [Setup Reference](#)

Learn about settings and options so that Salesforce Maps works for your reps and managers the way you intend.

#### SEE ALSO:

[Salesforce Maps Developer Guide](#)

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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## Installing and Giving Access to Salesforce Maps

Take the initial steps to help your field reps spend less time on the road and more time building relationships with customers.

### 1. [Install Salesforce Maps](#)

Get Salesforce Maps installed before you give your users access to it and its related products, such as Salesforce Maps Territory Planning and Salesforce Maps Advanced.

### 2. [Accessing Salesforce Maps Products](#)

Ensure all your reps get access to Salesforce Maps products, including Salesforce Maps Advanced and Territory Planning. And consider advantages and trade-offs for managing access through default and custom permission sets.

### 3. [Managing Permission Groups](#)

Grant and restrict access for users and profiles in Salesforce Maps. If the default permission group doesn't reflect the control that you want for everyone in your company, create your own permission groups. Then, determine who can, for example, edit Salesforce fields and export data.

### 4. [Determine Who Can Access Features and Assign Routes](#)

Control who sees what, who can assign routes, and whether reps can check out automatically after they leave a location, for example, in Salesforce Maps.

### 5. [Customizing Controls Available to Users](#)

Control which action buttons your Salesforce Maps users can access. Create and maintain as many sets of buttons as you want to assign to individual users and profiles.

## Install Salesforce Maps

Get Salesforce Maps installed before you give your users access to it and its related products, such as Salesforce Maps Territory Planning and Salesforce Maps Advanced.

1. Click the installation URL that you received in an email message after you submitted the Salesforce Maps order form email. Then log in to Salesforce.

2. Select **Install for Admins Only**.

3. Click **Install**.

4. Select **Yes, grant access to these third party websites** and click **Continue**.

5. If a message indicates that the installation is taking longer than expected, click **Done**.

We send you an email notification after the installation finishes. The installed package appears as a trial for up to 72 hours.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To install packages:

- Download AppExchange Packages

To configure installed packages:

- Customize Application

## Accessing Salesforce Maps Products

Ensure all your reps get access to Salesforce Maps products, including Salesforce Maps Advanced and Territory Planning. And consider advantages and trade-offs for managing access through default and custom permission sets.

### [Methods for Managing Access to Salesforce Maps Products](#)

Consider the impact of giving your reps access using recommended default permission sets compared with custom ones that you create.

### [Give Users Access to Salesforce Maps Products](#)

Grant access to Salesforce Maps products, including Territory Planning and Salesforce Maps Advanced.

## Methods for Managing Access to Salesforce Maps Products

Consider the impact of giving your reps access using recommended default permission sets compared with custom ones that you create.

Type of Permission Sets	Advantages	Considerations
Default	<ul style="list-style-type: none"> <li>They include access to fields and features that meet the most common security requirements for companies.</li> <li>When Salesforce periodically updates security requirements and releases new features, default permission sets include those updates.</li> </ul>	<ul style="list-style-type: none"> <li>Some companies prefer to provide lower-level access to certain fields than what default permission sets provide.</li> <li>Default permission sets don't provide options for fine-tuning field access.</li> </ul>
Custom	<ul style="list-style-type: none"> <li>They give you options for fine-tuning field access for your specific security requirements.</li> <li>It's easy to create custom permission sets when you clone the default ones.</li> </ul>	<ul style="list-style-type: none"> <li>When Salesforce periodically updates security requirements and releases new features, it's up to you to update your custom permission sets.</li> <li>If you don't update your custom permission sets, your reps can lose access to certain features.</li> </ul>

SEE ALSO:

[Knowledge Article: Updates to Include in Custom Permission Sets for Salesforce Maps Products](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Give Users Access to Salesforce Maps Products

Grant access to Salesforce Maps products, including Territory Planning and Salesforce Maps Advanced.

1. From Setup, in the Quick Find box, enter *users*, and then select **Users**.
2. Select a user that you want to grant access to Salesforce Maps and its related products.
3. In the Permission Set License Assignments section, click **Edit Assignments**.
4. Enable the Salesforce Maps permission set licenses that you want your user to access. Then save your changes.
5. In the Permission Set Assignments section, click **Edit Assignments**.
6. Select the permission sets that correspond to the permission set licenses that you enabled.

The Permission Set License...	Corresponds with This Permission Set
Salesforce Maps	SF Maps
Salesforce Maps Territory Planning	SF Maps Territory Planning
None	SF Maps Territory Planning for Sales Planning (Requires Sales Planning)
Salesforce Maps Advanced	SF Maps Advanced
Salesforce Maps Community Logins	SF Maps Community Logins
Salesforce Maps Community Named User	SF Maps Community Named User
Salesforce Maps Live Admin	SF Maps Live Admin
Salesforce Maps Live Mobile Tracking	SF Maps Live Mobile Tracking

7. For users who are also admins for Salesforce Maps products, select the Maps Admin permission set. This permission set is in addition to the permission sets you selected in the previous step.
8. Click **Add**, and then save your changes.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To assign user permission sets:

- Assign Permission Sets

## Managing Permission Groups

Grant and restrict access for users and profiles in Salesforce Maps. If the default permission group doesn't reflect the control that you want for everyone in your company, create your own permission groups. Then, determine who can, for example, edit Salesforce fields and export data.

### Create Permission Groups

Determine who you let, for example, edit field labels, export data, and create data layers in Salesforce Maps.

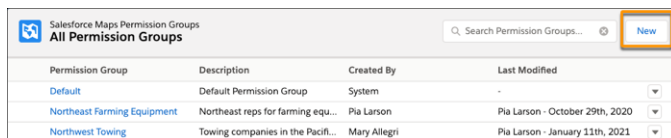
### Edit Permission Groups

Update permissions that you assigned to users and profiles in Salesforce Maps. That way, your permission groups accurately reflect the authorization you intend for your company.

## Create Permission Groups

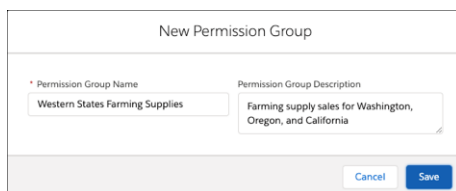
Determine who you let, for example, edit field labels, export data, and create data layers in Salesforce Maps.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Permission Groups > 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

4. Give your permission group a name and a description. Then save your work.



New Permission Group

\* Permission Group Name: Western States Farming Supplies

Permission Group Description: Farming supply sales for Washington, Oregon, and California

Buttons: Cancel, Save

5. Click **Edit**, then select the permissions that you want for your users. Assign users and profiles to the permission group.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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### EDITIONS

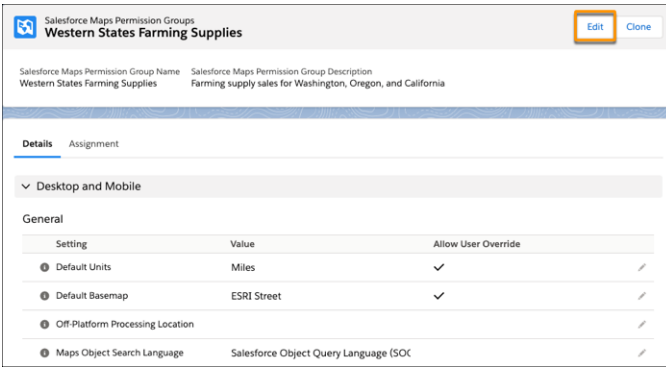
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application



## 6. Save your changes.

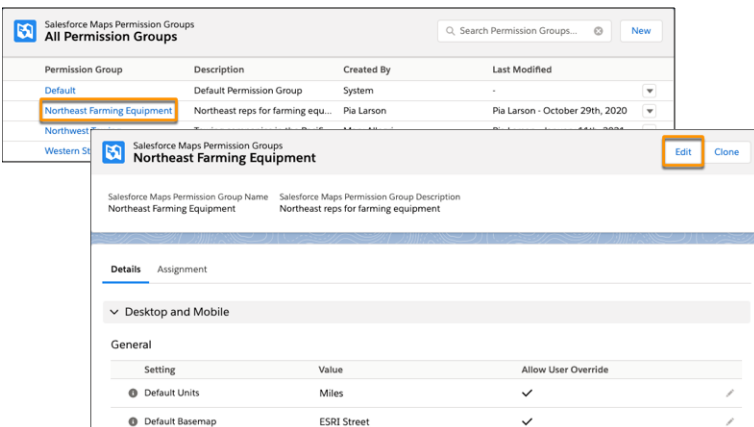
SEE ALSO:

[Permission Group Settings](#)

## Edit Permission Groups

Update permissions that you assigned to users and profiles in Salesforce Maps. That way, your permission groups accurately reflect the authorization you intend for your company.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Permission Groups**, and then select the permission group you want to edit.



4. Select the permissions that you want for your users and profiles.
5. Save your changes.

SEE ALSO:

[Permission Group Settings](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

## Determine Who Can Access Features and Assign Routes

Control who sees what, who can assign routes, and whether reps can check out automatically after they leave a location, for example, in Salesforce Maps.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Settings > General**. Then, select the features of your choice.  
Avoid selecting Debug Logs, because we reserve that for Salesforce Customer Support.
4. Save your work.

SEE ALSO:

[General Settings Options](#)

## Customizing Controls Available to Users

Control which action buttons your Salesforce Maps users can access. Create and maintain as many sets of buttons as you want to assign to individual users and profiles.

1. [Create and Maintain Button Sets](#)  
Determine which Salesforce Maps buttons you want available to individual users and profiles. For example, let users in a specific territory or industry add markers to routes and schedules, modify records, and log activities.
2. [Create Custom Actions Buttons](#)  
Give your reps access to web pages, Lightning web components, and flows from markers on the map. Add your customized actions to buttons that you include in Salesforce Maps button sets.
3. [Configure Custom Actions That Include Lightning Web Components and Flows](#)  
Show headers and buttons from Lightning web components and screen flows in custom actions without the standard, redundant ones that Salesforce Maps add.
4. [Assign Button Sets](#)  
Control which Salesforce Maps buttons individual users and profiles access based on the button sets you create.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Create and Maintain Button Sets

Determine which Salesforce Maps buttons you want available to individual users and profiles. For example, let users in a specific territory or industry add markers to routes and schedules, modify records, and log activities.

1. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Settings > Button Sets**.
4. To create a button set, select **Create New**. Then, give your button set a name. To maintain a button set, select the one you want to change.
5. Drag buttons between the layouts. To remove buttons, drag them to the Available Buttons section.

SEE ALSO:

[Button Sets Options](#)

## Create Custom Actions Buttons

Give your reps access to web pages, Lightning web components, and flows from markers on the map. Add your customized actions to buttons that you include in Salesforce Maps button sets.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Settings > Custom Actions**.
4. 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.

5. Specify any requirements for the custom actions button to appear.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### EDITIONS

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Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

## 6. Configure processes and automation.

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

The screenshot shows a configuration window titled "Processes and Automation". Under the "Action" section, "Launch Lightning Component" is selected. Below that, under "Lightning Component", "maps.DisplayAccountRecord" is selected. A checkbox labeled "Hide custom action header and footer" is checked. A blue "Save" button is located at the bottom left of the window.

## 7. Save your work.

## 8. Add your new button to any button sets.

## Configure Custom Actions That Include Lightning Web Components and Flows

Show headers and buttons from Lightning web components and screen flows in custom actions without the standard, redundant ones that Salesforce Maps add.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Click **Settings**, and then click **Custom Actions**.
4. Select the custom action from which you want to remove the Salesforce Maps header and button. Then select **Hide custom action header and footer**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

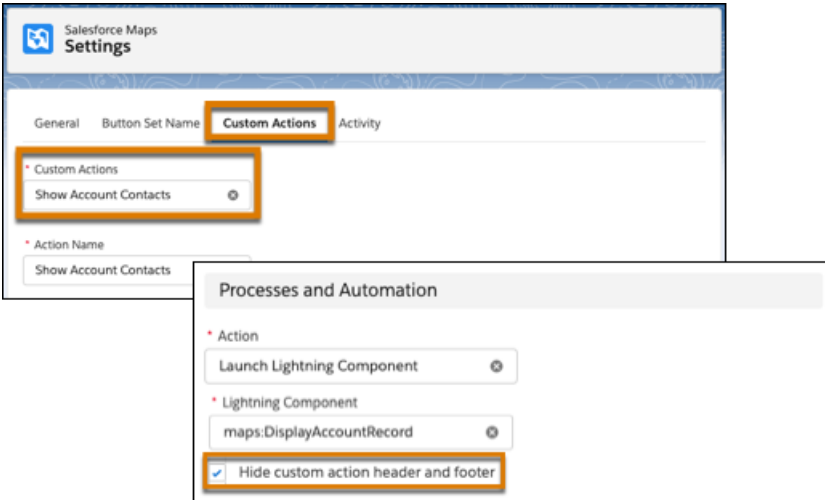
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application





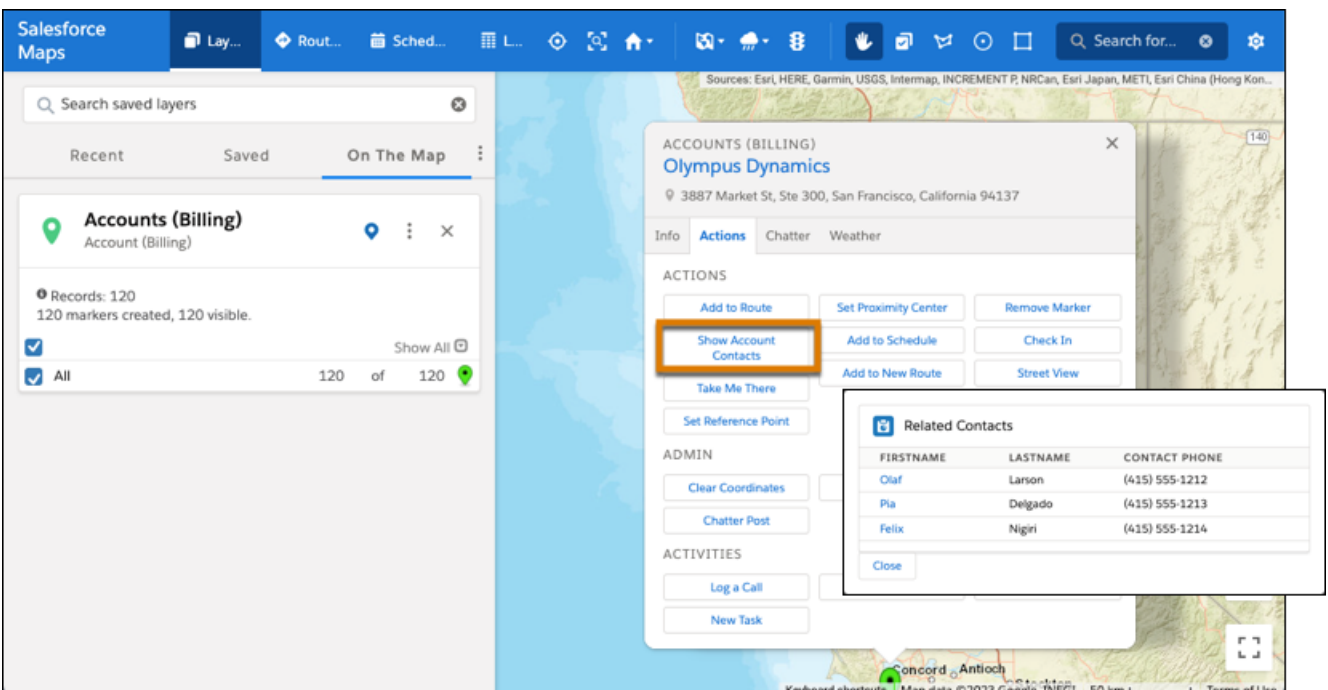
5. Save your changes.
6. Configure the close button that appears as part of your Lightning web component within the custom actions window. Add this attribute to your component's code.

```
<aura:attribute name="MapsCloseAction" type="Aura.action" access="global"/>
```

Then, add this logic to the component's JavaScript controller.

```
const MapsCloseAction =
component.get("v.MapsCloseAction");$A.enqueueAction(MapsCloseAction);
```

The custom action window appears without the standard Salesforce Maps title and close button.



## Assign Button Sets

Control which Salesforce Maps buttons individual users and profiles access based on the button sets you create.

1. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Permission Groups**, and then select the permission group to which you want to assign the button set.
4. In the **Button Set** field, select the button set that you want to assign to the permission group.
5. Save your work.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

## Controlling What Appears on Maps

Determine which objects and data that your reps can plot on the map in Salesforce Maps. Set up and organize a folder structure for sharing layers or keeping them private among specific reps.

### [Determining What Reps Can Plot on the Map](#)

Set up and manage base objects that correspond with the Salesforce records that your reps want to plot in Salesforce Maps. Help your reps reach and maintain peak productivity when you include data from Salesforce and any proprietary and third-party data providers.

### [Managing Shape Layers to Show Specific Areas on the Map](#)

Map specific areas using geographic boundaries such as countries, states, counties, census tracts, and postal codes in Salesforce Maps. Manage how boundaries appear in shape layers using filter, draw, copy, and adjust features.

### [Managing Marker Layers to Show Records on the Map](#)

Help sales and service managers and reps visualize their business-critical data using Salesforce Maps marker layers. Apply filters and styles to configure marker layers for specific business requirements.

### [Including External Data on the Map](#)

Help your company grow by setting up location analysis that shows specific proprietary and third-party data in Salesforce Maps. For example, focus on revenue or census data for conducting in-depth market research, scouting out new business locations, and discovering prospects.

### [Showing Utility Lines on the Map](#)

Retain customers and meet expectations when you support reps' efforts to address utility issues quickly by setting up polyline layers in Salesforce Maps. Plot spans that visualize records' polylines and select those records when planning work, such as trimming a tree that's interfering with transmission lines. Then use mass actions to add the line and tree's location to a route for your service team.

### [Locating Assets on the Map](#)

Gain insights into how your sales and service teams are operating. Analyze real-time and historical data to identify opportunities for growth, safety, and efficiency in Salesforce Maps. For example, dispatch the nearest driver to a service call when you see your drivers' locations on the map.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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### [Organizing Layers in Folders](#)

Organize layers in private folders. With folder permissions, you have control to create public folders within the Corporate folder, and then specify who gets access to them in Salesforce Maps.

## Determining What Reps Can Plot on the Map

Set up and manage base objects that correspond with the Salesforce records that your reps want to plot in Salesforce Maps. Help your reps reach and maintain peak productivity when you include data from Salesforce and any proprietary and third-party data providers.

### [Edit Base Objects](#)

Customize the base objects that correspond with the records that appear for your reps in Salesforce Maps. If the standard base objects don't meet your company's needs, tweak the base objects for a better fit.

### [Create Base Objects to Plot on Maps](#)

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

### [Plot Any Salesforce Data on the Map](#)

Visualize record data for objects that rely on addresses from a related object in Salesforce Maps. For example, your reps work with consumer goods and want to plot visit records, but the records don't include addresses. To get visit records to appear on the map, set up your Visit base object to include address fields from Retail Store or other related objects.

### [Plot Customer Data from Proprietary and Third-Party Systems](#)

Work with data that your company stores outside Salesforce directly in Salesforce Maps. Establish routes between Salesforce records that your reps plot on the map and records that your company stores in other systems. For example, let your reps plot unqualified, mail-in leads from your company's lead generation system and update it with geographical coordinates from Salesforce Maps. Or route auto body repair shops stored in Salesforce records to insurance adjusters stored in records on premises.

### [Include Dynamic Context Relevant to Plotted Salesforce Records](#)

Add context to Salesforce records when your reps plot them in Salesforce Maps. Help your reps focus on what's important using layers with dynamic filters for ID and string fields such as Owner ID and Billing State. For example, from Salesforce, your rep plots an account on the map. Accounts belonging to that rep within the plotted account's state also appear on the map.

### [Optimize POI and Search Performance](#)

Improve loading times for points-of-interest and search results when you exclude base objects that don't concern you from global search in Salesforce Maps.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Edit Base Objects

Customize the base objects that correspond with the records that appear for your reps in Salesforce Maps. If the standard base objects don't meet your company's needs, tweak the base objects for a better fit.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Base Object > Edit Existing**.
4. Select the base object that you want to edit.
5. Select an address location based on either the corresponding Salesforce object, or a related Salesforce record's ID.

For example, you edit the Opportunity base object because you want opportunities to reflect the address of their respective accounts—not the opportunities themselves. So you select **Account ID**. Salesforce Maps uses this address to plot markers and records on the map.

Or, you want billing accounts to reflect the address that's on the billing accounts. So you select **This Object**.

6. If you want, select the record type to which this base object applies.
7. Select the address and coordinate the options that you want maps to reference. Select among standard and custom address fields. For example, to let field reps see account locations based on billing addresses, select addresses and coordinates from the account billing address.

The screenshot shows a configuration window with two main sections: 'Address Fields' and 'Coordinate Fields'. Each section contains two columns of dropdown menus for selecting fields.

Address Fields	
Street	Postal Code
Billing Street	Billing Zip/Postal Code
City	Country
Billing City	Billing Country
State	
Billing State/Province	
Coordinate Fields	
Latitude	Verified Latitude
Billing Latitude	Select an Option
Longitude	Verified Longitude
Billing Longitude	Select an Option

8. Save your changes.

SEE ALSO:

[Base Objects Settings](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### Create Base Objects to Plot on Maps

In addition to the commonly used base objects that Salesforce Maps plots for you, you can add other objects that help your reps in the field. Base objects can represent either Salesforce objects that include addresses, or Salesforce objects that look up to ones that include addresses.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Base Object > Create New**.
4. Select the Salesforce object that you want to appear on maps.  
For example, you want to plot cases from high-revenue accounts. So you select **Case**.
5. Enter a name. Then select an address location based on either the corresponding Salesforce object, or a related Salesforce record's ID.  
For example, you want cases to reflect the address of their respective accounts—not the cases themselves. So you select **Account ID**.

6. Select the address and coordinate the options that you want maps to reference. Select among standard and custom address fields.  
For example, you want field reps to see account locations based on billing addresses. So you select addresses and coordinates from the account billing address.

#### EDITIONS

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Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

- To customize settings:
- Customize Application

7. Save your changes.

SEE ALSO:

[Base Objects Settings](#)

## Plot Any Salesforce Data on the Map

Visualize record data for objects that rely on addresses from a related object in Salesforce Maps. For example, your reps work with consumer goods and want to plot visit records, but the records don't include addresses. To get visit records to appear on the map, set up your Visit base object to include address fields from Retail Store or other related objects.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Base Object**.
4. From the base object for the records that your reps want to plot on the map, select the address location field such as **PlaceID**. Then select the related object from which you want to specify the address fields such as **Address**.

5. Select the address fields that you want to plot on the map from the related object.

6. Save your changes.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

## Plot Customer Data from Proprietary and Third-Party Systems

Work with data that your company stores outside Salesforce directly in Salesforce Maps. Establish routes between Salesforce records that your reps plot on the map and records that your company stores in other systems. For example, let your reps plot unqualified, mail-in leads from your company's lead generation system and update it with geographical coordinates from Salesforce Maps. Or route auto body repair shops stored in Salesforce records to insurance adjusters stored in records on premises.

1. Follow the steps to [create, connect to, and validate external data sources](#). When you create external objects, you can set them up to write geographical coordinates from Salesforce Maps to your source systems. To do so, select **Writable External Objects**.
2. Confirm and update these settings for all latitude and longitude fields in your external objects.

Set...	To...
Data Type	Number
Length	3
Decimal Places	15

3. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
4. Click **Configure** next to the Salesforce Maps package.
5. Create a base object. View all Salesforce objects, and then select the external object that you created. Name the base object and add a description.

The screenshot shows the 'Create New' configuration page for a base object. The 'Base Object' dropdown is set to 'publicSaccount' and the 'View All Salesforce Objects' checkbox is checked. Under 'Base Object Details', the 'Name' field is 'Mail-in Leads', 'Address Location' is 'This Object', and 'Record Type' is '--All--'. The 'Description' field contains 'In-house, unqualified leads'.

6. Map any address and coordinate fields.

### EDITIONS

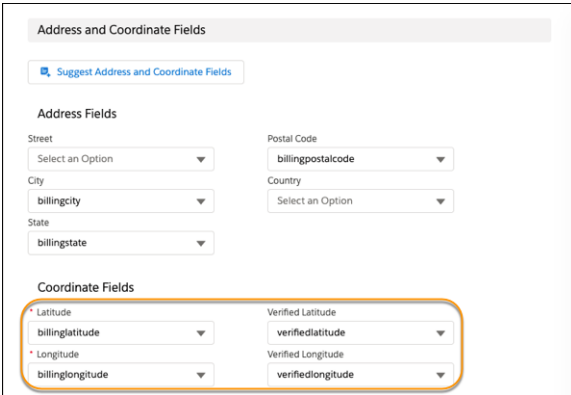
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application



**7. Save your work.**

Your reps can now create marker layers using the base object that connects to your external data source.

**Include Dynamic Context Relevant to Plotted Salesforce Records**

Add context to Salesforce records when your reps plot them in Salesforce Maps. Help your reps focus on what’s important using layers with dynamic filters for ID and string fields such as Owner ID and Billing State. For example, from Salesforce, your rep plots an account on the map. Accounts belonging to that rep within the plotted account’s state also appear on the map.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Base Object > Edit**, and then select the base object for the records that your reps plot on the map.
4. Scroll to Button URL and click **Select**.

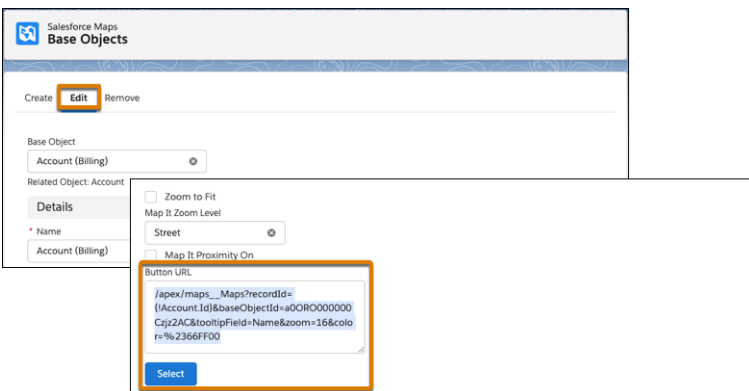
**EDITIONS**

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

**USER PERMISSIONS**

- To customize settings:
- Customize Application



The button URL copies to your clipboard. You later paste that URL when you create a button in the base object’s corresponding Salesforce object.

5. In object manager settings, select the object for the records that your reps plot, such as Account. Then select **Buttons, Links, and Actions > New Button or Link**.
6. Enter a label and a name, and then paste the button URL from your clipboard.

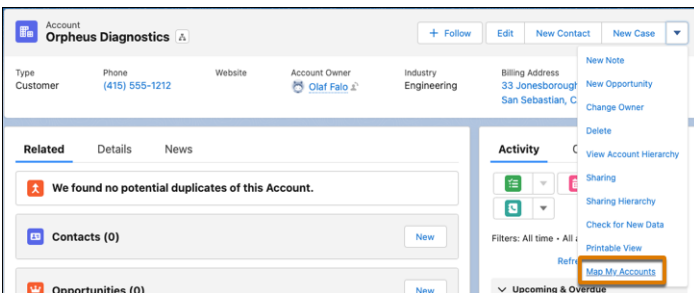


To specify a layer that loads when your reps plot records on the map, append the parameter `&layerid=` and the layer's ID that you copy from the `maps__MarkerLayer__c` object. To include fields with dynamic filtering such as Owner ID and Billing State, add a pipe character and then select the fields, each separated by pipe characters.

The screenshot shows the 'Custom Button or Link Edit' configuration page. The 'URL' field is highlighted with an orange box and contains the following text:

```
/apex/maps__MapsRecordId={!Account.Id}&baseObjectId=a00R0000000Czjz2AC6tooltipField=Name&zoom=16&color=92366FF00&layerid=A0123456789e|{|Account.OwnerId}|{|Account.BillingState}
```

7. Save your changes.
8. Add the custom button to your page layout, and then save your changes.  
The custom button appears on accounts.



## Optimize POI and Search Performance

Improve loading times for points-of-interest and search results when you exclude base objects that don't concern you from global search in Salesforce Maps.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Base Object > Edit Existing**.
4. Select the Salesforce object that you want to exclude from global search.
5. Scroll to Advanced Options and select **Disable Global Search**.

Optional Parameters  
 proximityRadius = Radius of Circle -> (number)  
 proximityUnit = Measurement Unit -> (meters,kilometers,miles,feet,yards)  
 proximityAffectMarkerVisibility = Only Show Markers Inside Shape -> (true or false)  
 zoomToFit = Zoom to Fit all Plotted Markers -> (true or false)

Advanced Options

Disable Global Search

Save Suggest

6. Save your changes.

## Managing Shape Layers to Show Specific Areas on the Map

Map specific areas using geographic boundaries such as countries, states, counties, census tracts, and postal codes in Salesforce Maps. Manage how boundaries appear in shape layers using filter, draw, copy, and adjust features.

### [Shape Layers and Data Source Updates](#)

Anticipate how changes to geographic boundaries such as countries, states, counties, census tracts, and postal codes can affect your sales and service efforts using Salesforce Maps.

### [Create Shape Layers](#)

Design and map layers that you plot on the map. Create layers when you define shapes using countries, filters, drawing tools, or postal codes.

### [Edit Shape Layers](#)

Set the geographic shape areas you see on the map, what details they show, and how they appear.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Shape Layers and Data Source Updates

Anticipate how changes to geographic boundaries such as countries, states, counties, census tracts, and postal codes can affect your sales and service efforts using Salesforce Maps.

Salesforce Maps works with providers, such as the US government, that supply data for your shape layers. Periodically, these providers update their data, which means that your shape layers reflect those updates. When providers update data:

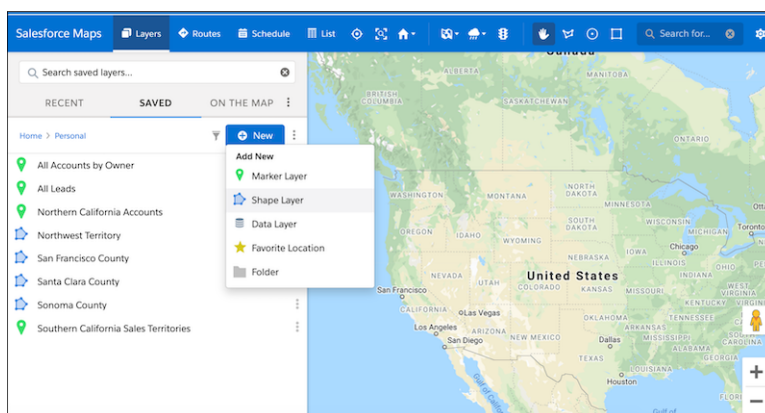
- Incrementally and frequently, such as for counties and postal codes, in some cases you notice minor changes to your shape layers.
- Infrequently, such as for census tracts every 10 years, your shape layers can change drastically.

Regardless of the frequency of these data updates, Salesforce Maps can't control whether and when providers update the data resulting in the boundaries that appear in your shape layers.

## Create Shape Layers

Design and map layers that you plot on the map. Create layers when you define shapes using countries, filters, drawing tools, or postal codes.

1. Click **Layers**.
2. To save the shape layer privately so only you can see it, click **Saved > Personal**. Or, to share the shape layer with other maps users, click **Saved > Corporate**.
3. Hover over **New** and select **Shape Layer**.



### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

To access the shared Corporate folder:

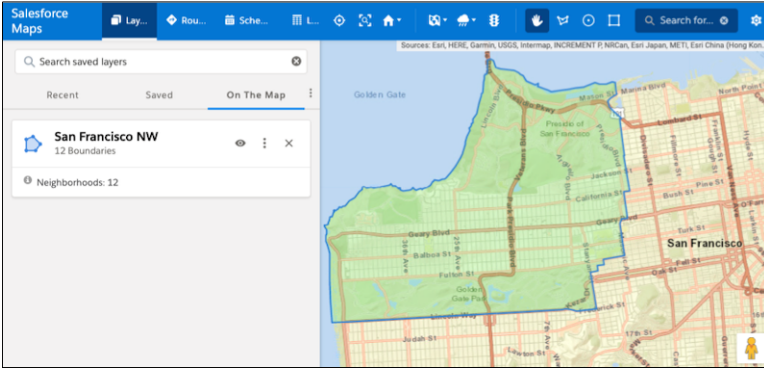
- Folder Permissions

- Enter a name and description.

- Click **Next**.
- Select a shape using filters, drawing on the map, or pasting postal codes.  
For example, to see all the neighborhoods in San Francisco, select **United States** > **Neighborhoods**, and then add a county filter.

- To create a label, adjust colors, and change other options for how your shape layer looks, click **Display**.

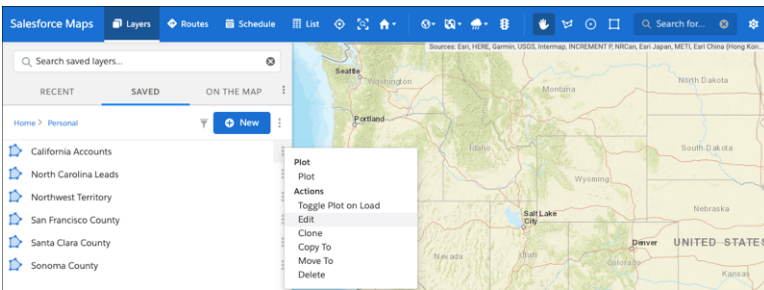
- Save and plot your changes.



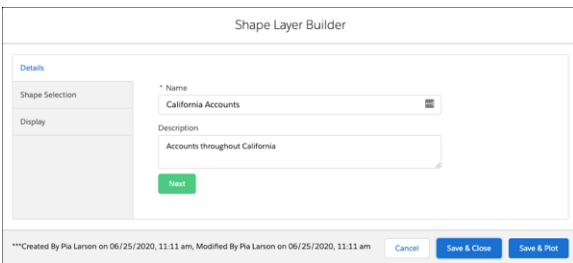
### Edit Shape Layers

Set the geographic shape areas you see on the map, what details they show, and how they appear.

1. Click **Layers**.
2. Enter the name of the shape layer you want to edit or click **Saved** and select the folder that contains the shape layer you want to edit.
3. Hover over the shape layer menu and click **Edit**.



4. Select the tab for the area you want to edit. Then make your changes.



5. Save your changes.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

- To customize settings:
- Customize Application
- To access the shared Corporate folder:
- Folder Permissions

## Managing Marker Layers to Show Records on the Map

Help sales and service managers and reps visualize their business-critical data using Salesforce Maps marker layers. Apply filters and styles to configure marker layers for specific business requirements.

### 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. Select the Salesforce Maps base objects with records that you want to show on the map.

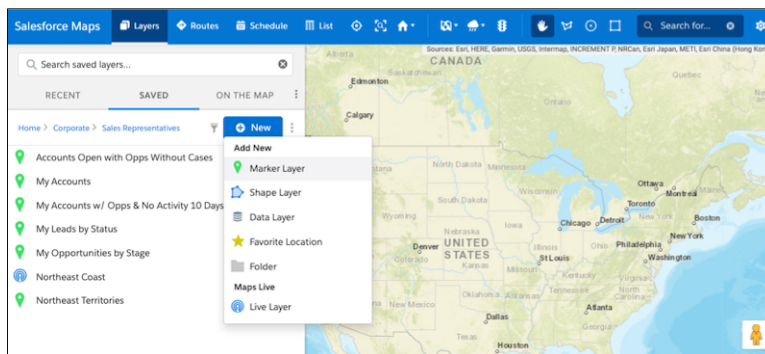
### Edit Marker Layers

Determine which records you see on the map, what details they show, and how they appear.

## 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. Select the Salesforce Maps base objects with records that you want to show on the map.

1. Click **Layers**.
2. To save the marker layer privately so only you can see it, click **Saved > Personal**. Or, to share the marker layer with other maps users, click **Saved > Corporate**.
3. Hover over **New**, and select **Marker Layer**.



4. Enter a name and description.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

To access the shared Corporate folder:

- Folder Permissions

5. Select the base object with records that you want to show on maps.
6. Click **Next**.
7. Select the filter and style options that you want the marker layer to show.
8. Save your changes.

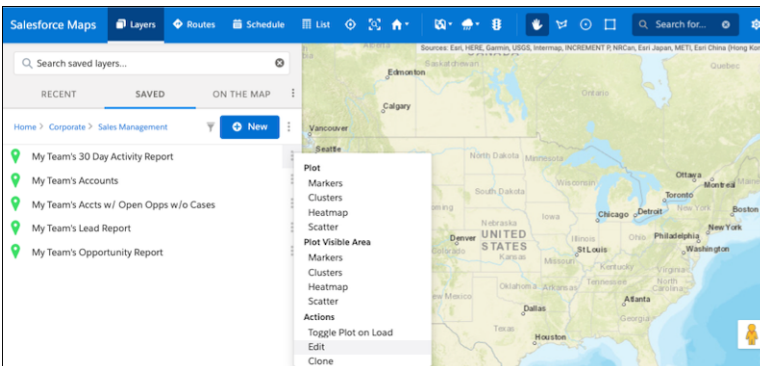
SEE ALSO:

[Determining What Reps Can Plot on the Map](#)  
[Marker Layer Options](#)

## Edit Marker Layers

Determine which records you see on the map, what details they show, and how they appear.

1. Click **Layers**.
2. Enter the name of the marker layer that you want to edit, or click **Saved**, and then select the folder that contains the maker layer that you want to edit.
3. Hover over the marker layer menu, and click **Edit**.



### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

To access the shared Corporate folder:

- Folder Permissions

4. Save your changes.

## SEE ALSO:

[Determining What Reps Can Plot on the Map](#)  
[Marker Layer Options](#)

## Including External Data on the Map

Help your company grow by setting up location analysis that shows specific proprietary and third-party data in Salesforce Maps. For example, focus on revenue or census data for conducting in-depth market research, scouting out new business locations, and discovering prospects.

### Create Data Layers

Determine what data you want to show in Salesforce Maps according to your business development and prospecting needs. Customize the data source, filter results, and style the data layer.

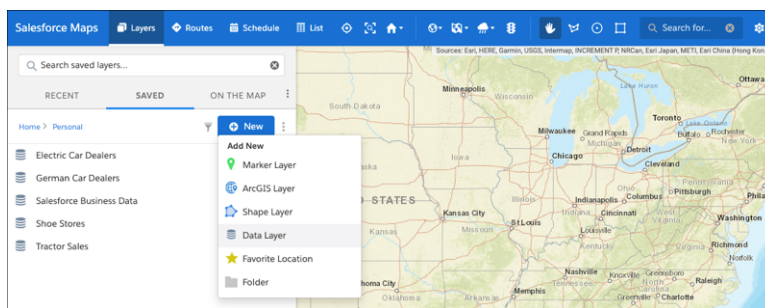
### Edit Data Layers

Adjust the sources, filters, or style of your plotted data layers and corresponding popup in Salesforce Maps.

## Create Data Layers

Determine what data you want to show in Salesforce Maps according to your business development and prospecting needs. Customize the data source, filter results, and style the data layer.

1. Click **Layers**.
2. To save the data layer privately so only you can see it, click **Saved > Personal**. Or, to share the data layer with other maps users, click **Saved > Corporate**.
3. Hover over **New** and select **Data Layer**.



4. Name the data layer and select the data source, filter, and style options you want the data layer to show. Popups provide helpful default topics preselected for some data sources, which you can edit at any time.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS

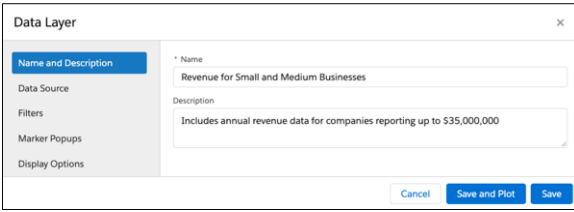
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

- To customize settings:
- Customize Application
- To access the shared Corporate folder:
- Folder Permissions





5. Save your changes.

Data layers plot results in the visible map area by default. To plot the data layer in different area, move the map and refresh the layer.

 **Tip:** Using the data plotted on the map, create Salesforce records quickly with Salesforce Maps Click2Create.

SEE ALSO:

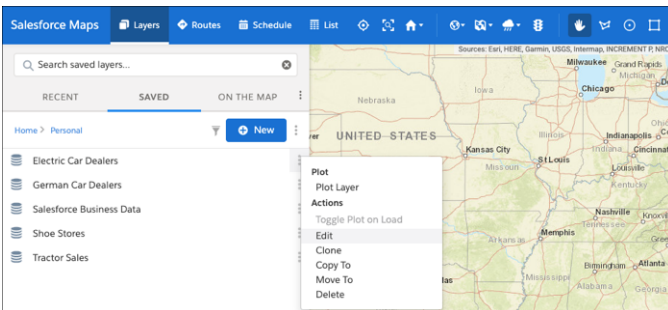
[Fields for Business Data \(USA\)](#)

[Fields for Property Data \(USA\)](#)

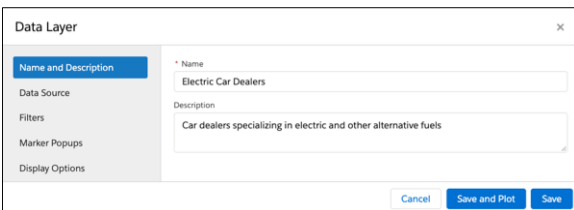
### Edit Data Layers

Adjust the sources, filters, or style of your plotted data layers and corresponding popup in Salesforce Maps.

1. Click **Layers**.
2. Enter the name of the data layer you want to edit or click **Saved** and select the folder that contains the data layer you want to edit.
3. Hover over the data layer menu and click **Edit**.



4. Select the tab for the area you want to edit. Then make your changes.



#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

#### USER PERMISSIONS

- To customize settings:
- Customize Application
- To access the shared Corporate folder:
- Folder Permissions

5. Save your changes.

## SEE ALSO:

[Fields for Business Data \(USA\)](#)

[Fields for Property Data \(USA\)](#)

## Showing Utility Lines on the Map

Retain customers and meet expectations when you support reps' efforts to address utility issues quickly by setting up polyline layers in Salesforce Maps. Plot spans that visualize records' polylines and select those records when planning work, such as trimming a tree that's interfering with transmission lines. Then use mass actions to add the line and tree's location to a route for your service team.

### [Create Polyline Layers](#)

Show utility lines on the map so reps can manage and respond to service calls quickly and efficiently in Salesforce Maps. Add filters that determine which polylines show up on the map, such as accounts in certain states or area codes.

### [Edit Polyline Layers](#)

Update polyline layers as your business changes and grows. Change which records you see on the map and adjust their filters, display options, and popups in Salesforce Maps.

## Create Polyline Layers

Show utility lines on the map so reps can manage and respond to service calls quickly and efficiently in Salesforce Maps. Add filters that determine which polylines show up on the map, such as accounts in certain states or area codes.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Choose a permission group and enable polyline layers under Layers.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To access Salesforce Maps:

- Salesforce Maps

To customize settings:

- Customize Application

To access the shared Corporate folder:

- Folder Permissions

Setting	Value
Maximum Records to Plot	5000
Maximum number of records to plot for External Objects	2000
Folder Administrator	<input checked="" type="checkbox"/>
Show User Folders	<input checked="" type="checkbox"/>
Show Personal Folders	<input checked="" type="checkbox"/>
Enable ArcGIS Layers	<input checked="" type="checkbox"/>
Enable Polyline Layers	<input checked="" type="checkbox"/>
Manage Data Layers	<input checked="" type="checkbox"/>

4. In Salesforce Maps Base Objects settings, select the base object that you want to plot polyline layers for, such as Account.
  - a. Configure the latitude and longitude fields.
  - b. Assign at least two geolocation fields to two vertices. Then click **Save**.

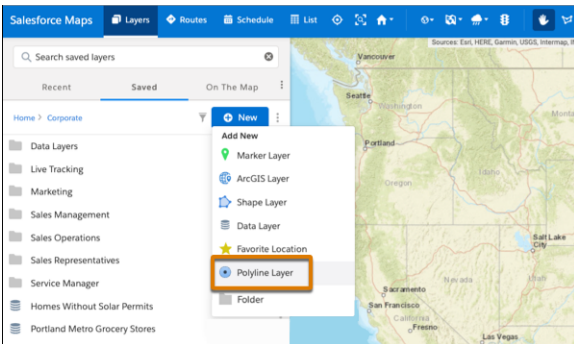
**Address and Coordinate Fields**

**Polyline Fields**

Vertex 1  
Geo 1

Vertex 2  
Geo 2

5. In Salesforce Maps, click **Layers**.
6. To save the polyline layer privately so only you can see it, click **Saved > Personal**. Or, to share the polyline layer with other maps users, click **Saved > Corporate**.
7. Hover over **New** and select **Polyline Layer**.



8. Enter a name and description.
9. Select the base object to plot.
10. Click **Next**.

### New Polyline Layer

- Name and Base Object
- Filters
- Display Options
- Pop-ups

**Name**  
Name and describe your polyline layer.

\* Name

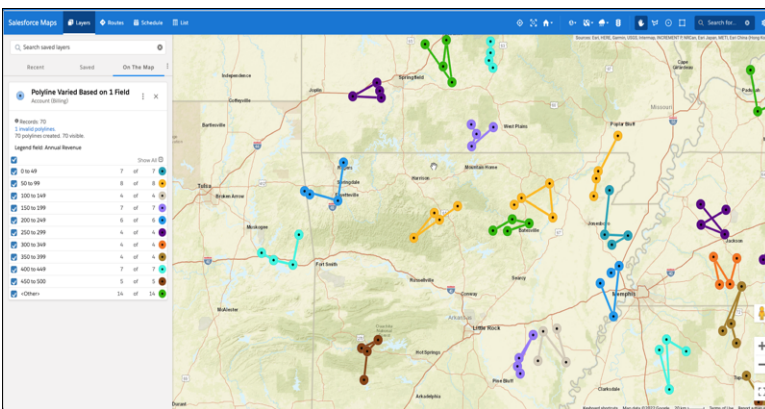
Description

**Base Object**  
Select the base object for the polylines you want to display on the map.

\* Base Object

Cancel
Next
Save
Save & Plot

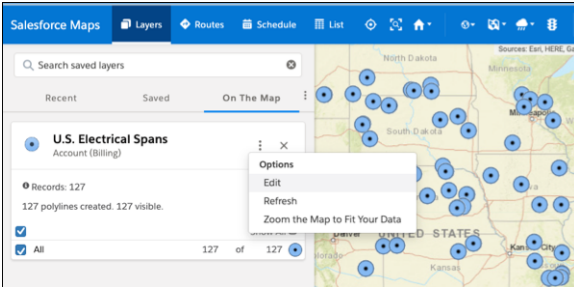
11. Choose the filter and style options that you want your polyline layer to show.
12. Save and plot your work.



## Edit Polyline Layers

Update polyline layers as your business changes and grows. Change which records you see on the map and adjust their filters, display options, and popups in Salesforce Maps.

1. Click **Layers**.
2. Enter the name of the polyline layer you want to edit, or click **Saved** and select the folder that contains the polyline layer you want to edit.
3. Hover over the polyline layer menu and click **Edit**.



4. Select the tab for the area you want to edit. Then make your changes.

Edit Polyline Layer

<p><b>Name and Base Object</b></p> <p>Filters</p> <p>Display Options</p> <p>Pop-ups</p>	<p><b>Name</b> Name and describe your polyline layer.</p> <p>* Name <input type="text" value="U.S. Electrical Spans"/></p> <p>Description <input type="text" value="Elect lines for utility service projects"/></p> <p><b>Base Object</b> Select the base object for the polylines you want to display on the map.</p> <p>* Base Object <input type="text" value="Account (Billing)"/></p>
---	--

5. Save your changes.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To access Salesforce Maps:

- Salesforce Maps

To customize settings:

- Customize Application

To access the shared Corporate folder:

- Folder Permissions

## Locating Assets on the Map

Gain insights into how your sales and service teams are operating. Analyze real-time and historical data to identify opportunities for growth, safety, and efficiency in Salesforce Maps. For example, dispatch the nearest driver to a service call when you see your drivers' locations on the map.

### Create Live Layers

Give sales and service managers insight into drivers and routes. With Salesforce Maps live layers, managers can see live and historical locations of vehicles, equipment, and users in the field. Select which assets appear on the map, what details they show, and how they look.

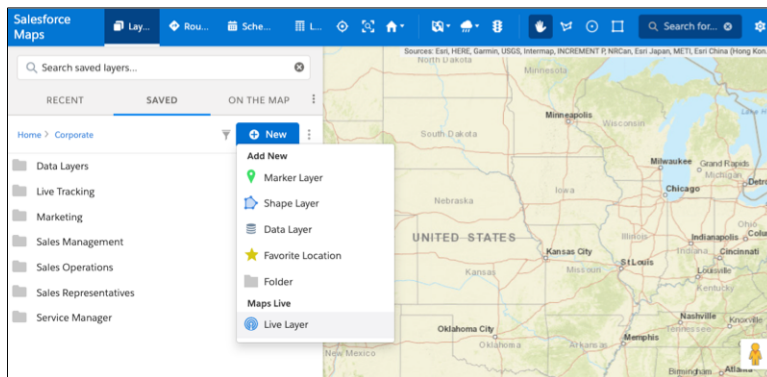
### Edit Live Layers

Update live layers in Salesforce Maps to account for changes in vehicles, equipment, and users in the field, and how they appear on the map.

## Create Live Layers

Give sales and service managers insight into drivers and routes. With Salesforce Maps live layers, managers can see live and historical locations of vehicles, equipment, and users in the field. Select which assets appear on the map, what details they show, and how they look.

1. Click **Layers**.
2. To save the live layer privately so only you can see it, click **Saved > Personal**. Or, to share the live layer with other maps users, click **Saved > Corporate**.
3. Hover over **New** and select **Live Layer**.



4. Select the base object with the records that you want to appear on maps.
5. Click **Continue**.
6. Enter a name and description.

### EDITIONS

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Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

To access the shared Corporate folder:

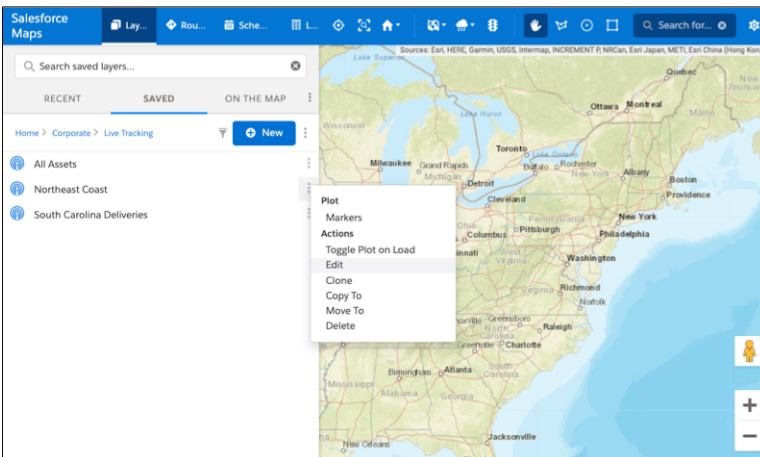
- Folder Permissions

7. Select the filter and style options that you want the live layer to show.
8. Save your changes.

## Edit Live Layers

Update live layers in Salesforce Maps to account for changes in vehicles, equipment, and users in the field, and how they appear on the map.

1. Click **Layers**.
2. Enter the name of the live layer that you want to edit, or click **Saved**, and then select the folder that contains the live layer that you want to edit.
3. Hover over the live layer menu, and click **Edit**.



4. Save your changes.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## USER PERMISSIONS

To customize settings:

- Customize Application

To access the shared Corporate folder:

- Folder Permissions

## Organizing Layers in Folders

Organize layers in private folders. With folder permissions, you have control to create public folders within the Corporate folder, and then specify who gets access to them in Salesforce Maps.

### Create Folders for Organizing Layers

Store, access, and organize layers in private folders. Or with folder permissions, you can create shared folders within the Corporate folder.

### Set Permissions for Shared Folders Used to Organize Layers

Specify which users and profiles can access your shared folders within the Corporate folder and the layers inside them.

#### SEE ALSO:

[Determine Who Can Access Features and Assign Routes](#)

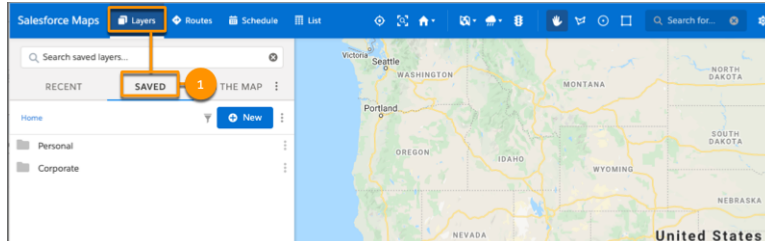
[General Settings Options](#)

[Managing Permission Groups](#)

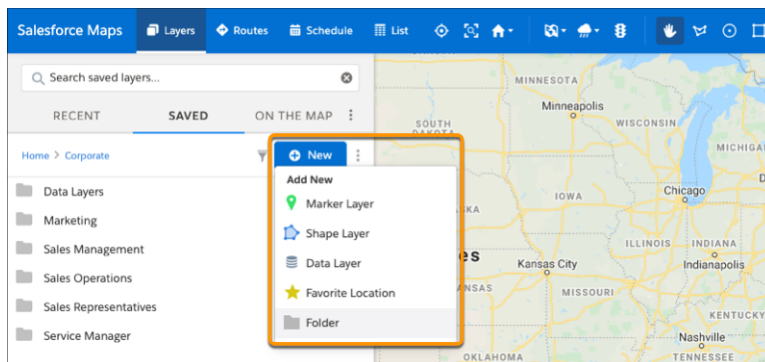
## Create Folders for Organizing Layers

Store, access, and organize layers in private folders. Or with folder permissions, you can create shared folders within the Corporate folder.

1. In Salesforce Maps, click **Layers** > **Saved**.



2. Select either **Personal** or **Corporate**, depending on whether you want to create a private or a shared folder.
3. Hover over New, and then click **Folder**.



### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

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Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application



4. Enter a unique name, and then click **Create**.

SEE ALSO:

[Set Permissions for Shared Folders Used to Organize Layers](#)

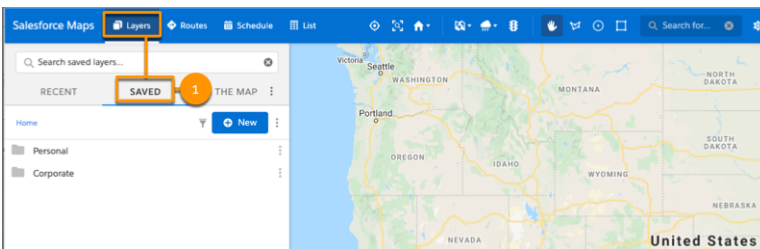
[Create Marker Layers](#)

[Create Shape Layers](#)

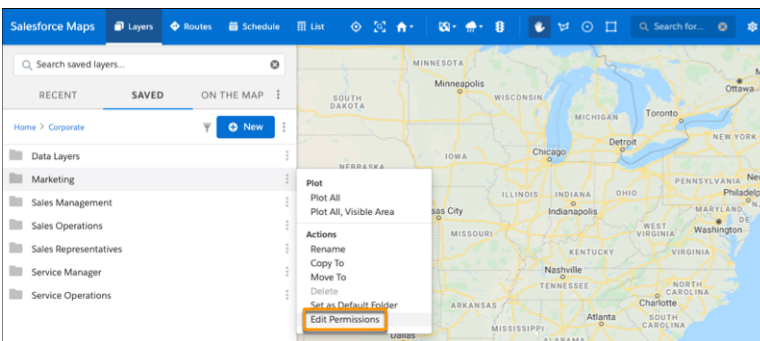
## Set Permissions for Shared Folders Used to Organize Layers

Specify which users and profiles can access your shared folders within the Corporate folder and the layers inside them.

1. In Salesforce Maps, click **Layers > Saved**.



2. Select **Corporate**.
3. Right-click the folder that you want to set permissions for. Then, click **Edit Permissions**.



4. To add a permission, click **Create New > User** or **Create New > Profile**. Then, search for the user or profile that you want to set permissions for.
5. Set the permissions that you want to grant to your user or profile. Then, save your changes.

### EDITIONS

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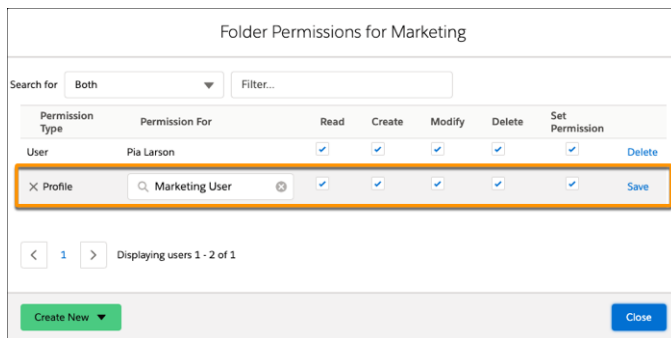
### USER PERMISSIONS

To customize settings:

- Customize Application

To set folder permissions:

- Folder Permissions



## SEE ALSO:

[Determine Who Can Access Features and Assign Routes](#)

[Create Folders for Organizing Layers](#)

## Keeping Field Reps Safe During Customer Visits

Help your sales and service reps and their customers minimize the risk of exposure to COVID-19. Your reps request manager approval for on-site customer visits directly in Salesforce Maps. When your reps arrive at and depart from approved, in-person customer visits, prompt your reps to review and respond to your company's safety guidelines.

### 1. [Your Company's Safety Guidelines](#)

Minimize the risk of exposure to COVID-19 among your sales and service reps and their customers during in-person visits when you provide critical guidance from your company in Salesforce Maps. Create safety checklists that capture guidance from your company's leaders and state and local governments.

### 2. [Establishing an Approval Processes for In-Person Customer Visits](#)

Automate processes that help sales and service reps request manager approval for on-site customer visits and adhere to your company's COVID-19 safety guidelines. Show your reps which customers they're approved to meet using visual indicators that you configure in Salesforce Maps.

### 3. [Prompting Field Reps to Respond to Safety Guidelines](#)

Encourage your sales and service reps to minimize risk of exposure to COVID-19. Prompt them to review and respond to your company's safety guidelines in Salesforce Maps. Automate prompts whenever your reps arrive at and depart from in-person customer visits.

### 4. [Identifying Trends for New COVID-19 Cases](#)

Give sales and service managers and their field reps tools to use to make informed decisions before they schedule in-person customer visits. Show trends over 14-day moving averages within US counties in Salesforce Maps. Adding an ArcGIS layer shows uptrends, downtrends, and trend duration.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Your Company's Safety Guidelines

Minimize the risk of exposure to COVID-19 among your sales and service reps and their customers during in-person visits when you provide critical guidance from your company in Salesforce Maps. Create safety checklists that capture guidance from your company's leaders and state and local governments.

Craft your guidelines using our samples for inspiration.

For...	Review These Samples
Employee health	<ul style="list-style-type: none"> <li>• I haven't tested positive for COVID-19 in the past 14 days.</li> <li>• I've measured my body temperature within the last 3 hours, and the reading was lower than 100.4 or 38 .</li> <li>• I'm not experiencing any <a href="#">symptoms</a> consistent with COVID-19.</li> <li>• I've completed my wellness check-in through <a href="#">work.com</a>.</li> </ul>
Employee safety	<ul style="list-style-type: none"> <li>• I haven't had contact with anyone confirmed or suspected of having COVID-19 in the past 14 days.</li> <li>• I agree to report any suspected exposure to COVID-19.</li> <li>• I haven't traveled outside my state or province, except for my regular work commute or other day-to-day reasonable activities in the past 14 days.</li> <li>• I agree to maintain a distance of at least 6 feet (or roughly 2 meters) from others and to not shake hands or share or exchange items.</li> <li>• I agree to use applicable personal protective equipment such as face coverings.</li> <li>• I agree to practice good health hygiene such as washing my hands, not touching my face, and applying hand sanitizer.</li> <li>• I've reviewed case trends for this location and its surrounding counties.</li> </ul>
Customer safety	<ul style="list-style-type: none"> <li>• My customer provided documented consent for this in-person visit.</li> <li>• My customer has had the opportunity to communicate all requirements for a safe meeting.</li> </ul>

When your field reps arrive at or depart from customer visits, prompt them to review and respond to your company's guidelines. Always refer to your state and local government regulations.

## Establishing an Approval Processes for In-Person Customer Visits

Automate processes that help sales and service reps request manager approval for on-site customer visits and adhere to your company's COVID-19 safety guidelines. Show your reps which customers they're approved to meet using visual indicators that you configure in Salesforce Maps.

### 1. [Setting Up an Object for Manager Approvals](#)

Handle and store manager approvals for on-site customer visits using a custom object that you create in Salesforce. Let sales and service reps request their manager's approval for visits directly from marker pop-ups in Salesforce Maps.

### 2. [Creating Email Templates for On-Site Visit Requests](#)

Keep your sales and service reps informed about the statuses of their on-site visit requests. Automate email notifications that tell reps when they submit requests through Salesforce Maps and whether their managers approve or deny visits to specific customers.

### 3. [Developing a Process to Approve On-Site Visits](#)

Automate processes for submitting, approving, and denying requests for in-person customer visits from sales and service reps. Your reps submit requests for visits to managers through Salesforce Maps.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### 4. [Create On-Site Visit Requests for New Records](#)

Automate the submission of requests for on-site visits when sales and service reps create accounts in Salesforce Maps.

#### 5. [Building the Flow for On-Site Visit Requests](#)

Automate processes for submitting, approving, and denying requests for in-person customer visits from sales and service reps. Your reps submit requests to managers through Salesforce Maps.

#### 6. [Preparing Salesforce Maps for On-Site Approval Requests](#)

Let your sales and service reps submit requests for in-person customer visits directly in Salesforce Maps. Provide visual indicators for your reps so that they identify which customers they're approved to visit.

## Setting Up an Object for Manager Approvals

Handle and store manager approvals for on-site customer visits using a custom object that you create in Salesforce. Let sales and service reps request their manager's approval for visits directly from marker pop-ups in Salesforce Maps.

#### 1. [Create an Object for Approvals](#)

Set up a custom object that handles manager approvals for on-site customer visits. Sales and service reps request approvals directly in Salesforce Maps.

#### 2. [Add Fields for Approvals](#)

Set up fields that managers require for determining whether to approve on-site visits. Sales and service reps request approvals directly from marker pop-ups in Salesforce Maps.

#### 3. [Set Permissions for Approvals](#)

Give managers and their field reps access to the custom object that you created for handling and storing approvals using profile-based permissions. Sales and service reps submit approval requests from marker pop-ups in Salesforce Maps.

#### 4. [Add Approval Status Fields to Records](#)

Let managers and their sales and service reps track statuses of on-site visit requests when they view records, such as accounts, and plot marker layers in Salesforce Maps. Set up an on-site approval status field on the object for the records that reps plot on the map.

#### 5. [Prevent Changes to Statuses on the Object for Approvals](#)

Ensure that on-site approval statuses change only through the approval process when you set the approval status field for on-site visits to read-only. Sales and service reps request approval from marker pop-ups in Salesforce Maps, then managers approve or deny those requests.

#### 6. [Prevent Changes to Approval Statuses on Records](#)

Require sales and service reps to adhere to the process for scheduling in-person visits when you set the on-site approval field that appears on records to read-only.

#### 7. [Sync On-Site Approval Status Fields](#)

Sync the statuses of on-site requests between on-site approval records for handling and storing approvals and records related to them, such as accounts. For example, when managers approve requests for accounts, trigger code updates the statuses for on-site approval records. When statuses for on-site approval records sync with account records, sales and service reps see which accounts they're approved to visit based on color-coded markers in Salesforce Maps.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Create an Object for Approvals

Set up a custom object that handles manager approvals for on-site customer visits. Sales and service reps request approvals directly in Salesforce Maps.

1. From Object Manager in Setup, select **Create > Custom Object**.
2. Enter a label and a description, then set the label for the record name and the data type.
3. Select **Allow Reports, Allow Activities, and Allow in Chatter Groups**. Then save your work.

## Add Fields for Approvals

Set up fields that managers require for determining whether to approve on-site visits. Sales and service reps request approvals directly from marker pop-ups in Salesforce Maps.

1. From Object Manager in Setup, select the object you created for manager approvals.
2. Click **Fields & Relationships > New**.
3. Create these fields, then add them to the page layout for the object you created for manager approvals.

Field for...	For the property...	Do This
Manager who approves	Field Type	Select <b>Lookup Relationship</b> .
	Related To	Select <b>User</b> .
	Field Label	Enter <i>Approving Manager</i> .
	Field-Level Security	Accept the default settings.
Related account	Field Type	Select <b>Master-Detail Relationship</b> .
	Related To	Select <b>Account</b> or the type of record that your reps plot.
	Field Label	Enter <i>Related To</i> .
	Custom Related List	Select <b>Account</b> or the type of record that your reps plot.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To create custom objects:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To create fields:

- Customize Application

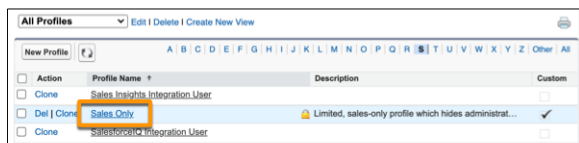
Field for...	For the property...	Do This
Account address	Field Type	Select <b>Formula</b> .
	Field Label	Enter <i>Location</i> .
	Formula Return Type	Select <b>Text</b> .
	Formula	Enter the formula: <pre>Related_To__r.BillingStreet &amp; " " &amp; BR() &amp; Related_To__r.BillingCity &amp; ", " &amp; Related_To__r.BillingState &amp; " " &amp; Related_To__r.BillingPostalCode</pre>
	Field-Level Security	Accept the default settings.
Approval status	Field Type	Select <b>Picklist</b> .
	Field Label	Enter <i>Status</i> .
	Values	Select <b>Enter Values, with each value separated by a new line</b> . On separate lines, enter: <ul style="list-style-type: none"> <li>• <i>Request not submitted</i></li> <li>• <i>Request submitted</i></li> <li>• <i>Approved</i></li> <li>• <i>Denied</i></li> </ul> Then select: <ul style="list-style-type: none"> <li>• <b>Use first value as default value</b></li> <li>• <b>Restrict picklist to the values defined in the value set</b></li> </ul>
	Field-Level Security	Accept the default settings.

4. Save your work.

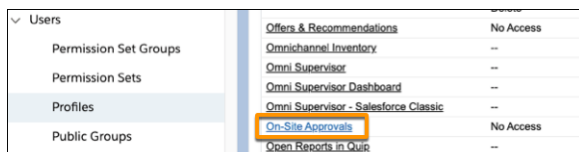
## Set Permissions for Approvals

Give managers and their field reps access to the custom object that you created for handling and storing approvals using profile-based permissions. Sales and service reps submit approval requests from marker pop-ups in Salesforce Maps.

1. From Setup, go to **Users > Profiles**.
2. Click the name of the profile that you want to have access to on-site approvals.



3. Click **Object Settings**.
4. Click your approval object.



5. Click **Edit**, then select the object permissions:
  - Read
  - Create
  - Edit
  - Delete
  - View All
6. Save your work. Repeat steps 1 through 5 for all profiles you want to have access to on-site approvals.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To set permissions:

- Customize Application

## Add Approval Status Fields to Records

Let managers and their sales and service reps track statuses of on-site visit requests when they view records, such as accounts, and plot marker layers in Salesforce Maps. Set up an on-site approval status field on the object for the records that reps plot on the map.

1. From Object Manager in Setup, select the object that you related to your on-site approval object, such as Account.
2. Click **Fields & Relationships > New**.
3. Create an approval status field, then add it to the page layouts where you want statuses for on-site visit requests to appear.

The screenshot shows the configuration for a new picklist field. The field label is 'On-Site Approval Status'. Under the 'Values' section, the option 'Enter values, with each value separated by a new line' is selected. The text area contains the following values: 'Request not submitted', 'Request submitted', 'Approved', and 'Denied'. Below the text area, the following options are checked: 'Use first value as default value' and 'Restrict picklist to the values defined in the value set'. The field name is 'On\_Site\_Approval\_Sta'.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create fields:

- Customize Application


For...	Do This
Field Type	Select <b>Picklist</b> .
Field Label	Enter a label such as <i>On-Site Approval Status</i> .
Values	Select <b>Enter Values, with each value separated by a new line</b> . Then on separate lines, enter the statuses: <ul style="list-style-type: none"> <li>• <i>Request not submitted</i></li> <li>• <i>Request submitted</i></li> <li>• <i>Approved</i></li> <li>• <i>Denied</i></li> </ul> Then select: <ul style="list-style-type: none"> <li>• <b>Use first value as default value</b></li> <li>• <b>Restrict picklist to the values defined in the value set</b></li> </ul>
Field-Level Security	Accept the default settings.

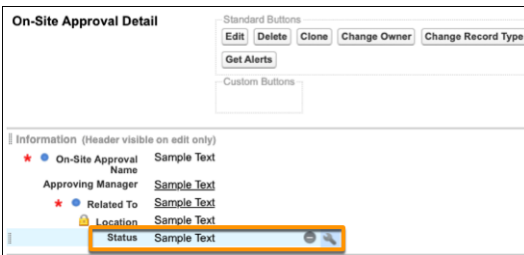
4. Save your work.



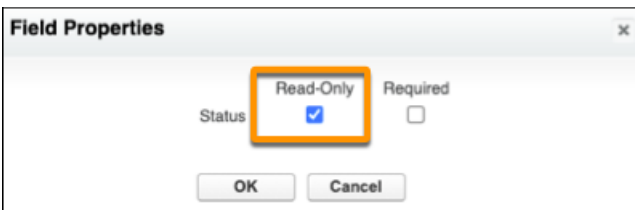
## Prevent Changes to Statuses on the Object for Approvals

Ensure that on-site approval statuses change only through the approval process when you set the approval status field for on-site visits to read-only. Sales and service reps request approval from marker pop-ups in Salesforce Maps, then managers approve or deny those requests.

1. From Object Manager in Setup, select the object you created for manager approvals.
2. Click **Page Layouts > On-Site Approval Layout**.
3. Hover over **Status**, then click .




4. Select **Read-Only**, then click **OK**.

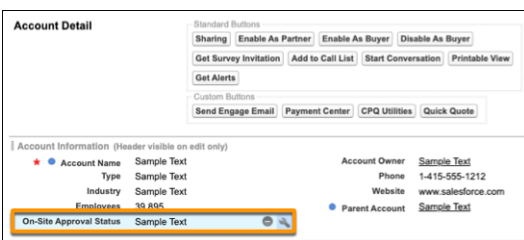


5. Save your work.

## Prevent Changes to Approval Statuses on Records

Require sales and service reps to adhere to the process for scheduling in-person visits when you set the on-site approval field that appears on records to read-only.

1. From Object Manager in Setup, select an object such as account.
2. Click **Page Layouts > Account**.
3. Hover over the On-Site Approval Status field, then click .



4. Select **Read-Only**, then click **OK**.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To specify access for objects:

- Customize Application

## EDITIONS

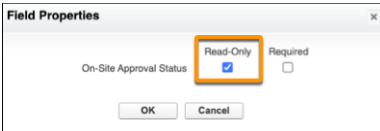
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To set access for fields:

- Customize Application



5. Save your work.

### Sync On-Site Approval Status Fields

Sync the statuses of on-site requests between on-site approval records for handling and storing approvals and records related to them, such as accounts. For example, when managers approve requests for accounts, trigger code updates the statuses for on-site approval records. When statuses for on-site approval records sync with account records, sales and service reps see which accounts they're approved to visit based on color-coded markers in Salesforce Maps.

1. From Setup, select **Developer Console**.
2. Click **File > New > Apex Trigger**.
3. Name the trigger *OnSiteApprovalTrigger*, for example.
4. For sObject, select **On\_Site\_Approval\_\_c**, for example.
5. Click **Submit**.

### EDITIONS

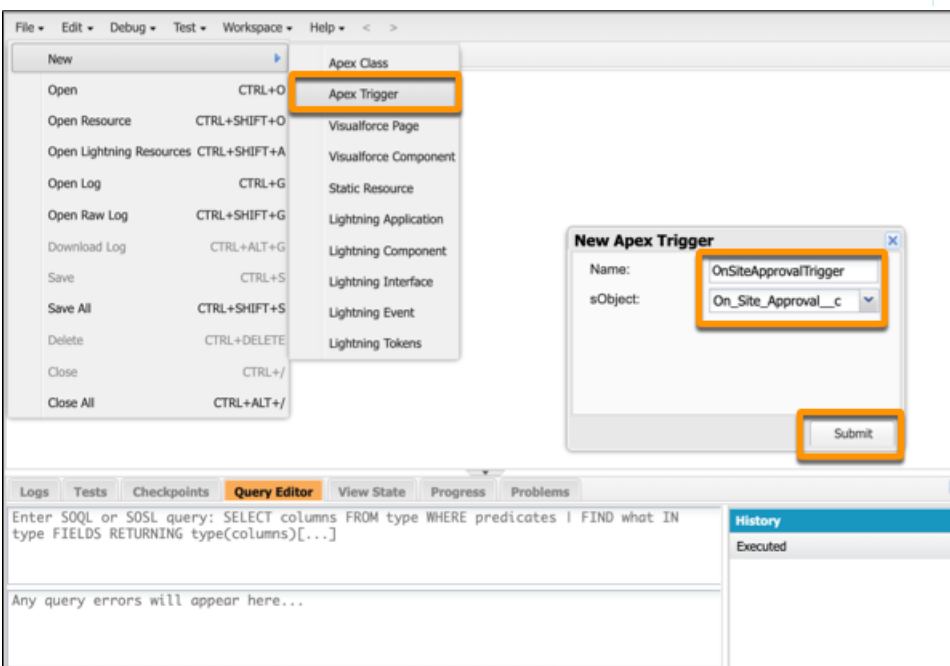
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To create an Apex trigger:

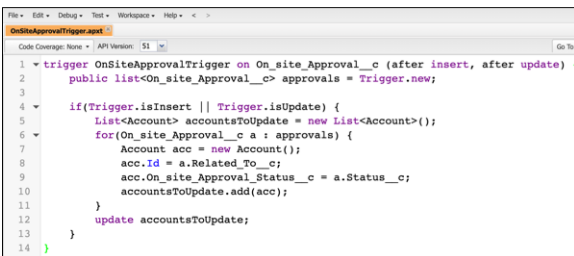
- Author Apex



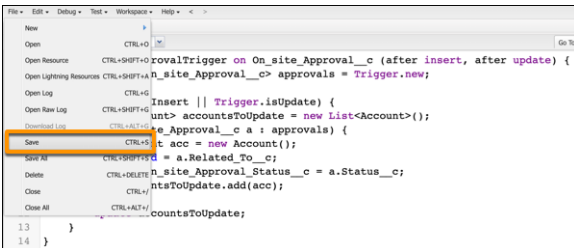
- Enter the trigger code into the body as shown with this sample code. If you're using different API names of objects and fields, modify them as needed.

```
trigger OnSiteApprovalTrigger on On_site_Approval__c (after insert, after update) {
    public list<On_site_Approval__c> approvals = Trigger.new;

    if(Trigger.isInsert || Trigger.isUpdate) {
        List<Account> accountsToUpdate = new List<Account>();
        for(On_site_Approval__c a : approvals) {
            Account acc = new Account();
            acc.Id = a.Related_To__c;
            acc.On_site_Approval_Status__c = a.Status__c;
            accountsToUpdate.add(acc);
        }
        update accountsToUpdate;
    }
}
```



- Click **File > Save**.



## Creating Email Templates for On-Site Visit Requests

Keep your sales and service reps informed about the statuses of their on-site visit requests. Automate email notifications that tell reps when they submit requests through Salesforce Maps and whether their managers approve or deny visits to specific customers.

### 1. Set Up an Email Template for Submitted Requests

Provide automated email confirmations to your sales and service reps when they submit requests for on-site visits through Salesforce Maps.

### 2. Set Up an Email Template for Approved Requests

Deliver the good news to sales and service reps when their managers approve on-site visits with specific customers. A marker layer that you set up later in Salesforce Maps includes visual indicators that tell reps which customers they're approved to visit.

### 3. Set Up an Email Template for Denied Requests

Inform your sales and service reps when managers deny on-site visits for specific customers. A marker layer that you set up later in Salesforce Maps includes visual indicators that tell reps which customers aren't approved for visits.

#### EDITIONS

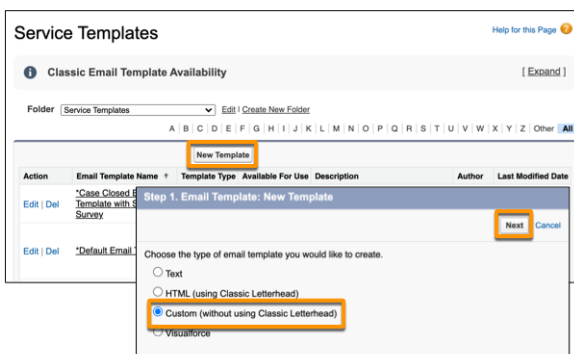
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Set Up an Email Template for Submitted Requests

Provide automated email confirmations to your sales and service reps when they submit requests for on-site visits through Salesforce Maps.

1. From Setup, in the Quick Find box, enter *Templates*, then select **Classic Email Templates**.
2. Click **New Template**.
3. Select **Custom (without using Classic Letterhead)** as the template type, then click **Next**.



4. Enter the email template information.

Field	Value
Folder	Unfiled Public Classic Email Templates
Available for Use	Selected
Email Template Name	On-Site Approval Submitted
Encoding	General US & Western Europe

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To create custom HTML email templates:

- Edit HTML Templates

Field	Value
Subject	Your Salesforce Maps on-site approval request was submitted

5. Click **Next**.

Step 2. Custom Email Template: New Template

Step 2 of 4

Previous Next Cancel

**Email Template Information** Required Information

Folder: Unified Public Classic Email Templates

Available For Use:

Email Template Name: On-Site Approval Subj

Template Unique Name: On\_Site\_Approval\_Su

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description: Email to confirm on-site visit request was submitted

Subject: Your Salesforce Maps on-site approval request was submitted

6. Enter the code into the HTML Body as shown with this sample code. Modify the text and names as needed.

```
You submitted an on-site approval request to your manager or delegated approver:
{!User.Manager}. View the request <a href="{!On_Site_Approval__c.Link}">here</a>.
<br/><br/>
<span style="font-weight:bold;">Account Owner</span>
<br/>
{!Account.OwnerFullName}
<br/><br/>
<span style="font-weight:bold;">Account Name</span>
<br/>
{!Account.Name}
<br/><br/>
<span style="font-weight:bold;">Account Address</span>
<br/>
{!Account.BillingStreet}
<br/>
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}
```

7. Click **Next**.

Step 3. Create HTML version

Step 3 of 4

Preview Previous Next Cancel

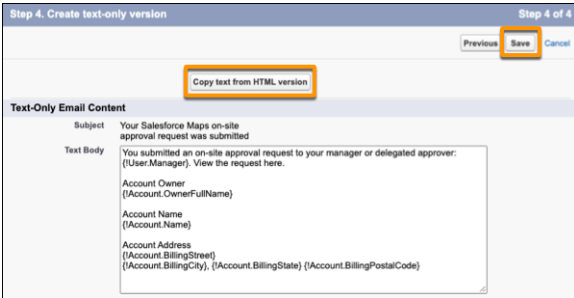
**HTML Email Content** Required Information

Subject: Your Salesforce Maps on-site approval request was submitted

HTML Body: You submitted an on-site approval request to your manager or delegated approver:
{!User.Manager}. View the request <a href="{!On\_Site\_Approval\_\_c.Link}">here</a>.
<br/><br/>
<span style="font-weight:bold;">Account Owner</span>
<br/>
{!Account.OwnerFullName}
<br/><br/>
<span style="font-weight:bold;">Account Name</span>
<br/>
{!Account.Name}
<br/><br/>
<span style="font-weight:bold;">Account Address</span>
<br/>
{!Account.BillingStreet}
<br/>
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}

8. Click **Copy text from HTML version**.

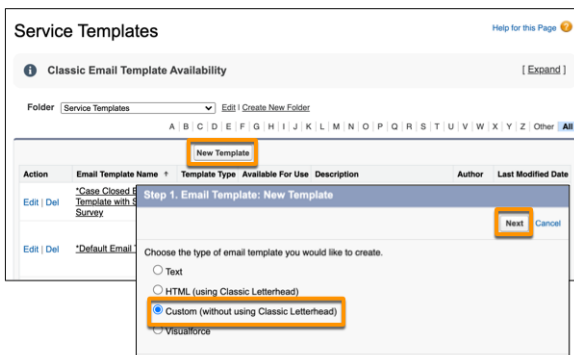
9. Save your work.



### Set Up an Email Template for Approved Requests

Deliver the good news to sales and service reps when their managers approve on-site visits with specific customers. A marker layer that you set up later in Salesforce Maps includes visual indicators that tell reps which customers they're approved to visit.

1. From Setup, in the Quick Find box, enter *Templates*, then select **Classic Email Templates**.
2. Click **New Template**.
3. Select **Custom (without using Classic Letterhead)** as the template type, then click **Next**.



4. Enter the email template information.

Field	Value
Folder	Unfiled Public Classic Email Templates
Available for Use	Selected
Email Template Name	On-Site Approval Approved
Encoding	General US & Western Europe
Subject	Your Salesforce Maps on-site approval request was approved

5. Click **Next**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

- To create custom HTML email templates:
- Edit HTML Templates

Step 2 of 4

Previous **Next** Cancel

**Email Template Information** Required Information

Folder: Unified Public Classic Email Templates

Available For Use:

Email Template Name: On-Site Approval Appr

Template Unique Name: On\_Site\_Approval\_Ap

Encoding: General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Description: Email to confirm on-site visit request was approved

Subject: Your Salesforce Maps on-site approval request was approved

- Enter the code into the HTML Body as shown with this sample code. Modify the text and names as needed.

```
The on-site approval request you submitted has been approved by {!User.Name}.
View the request <a href="{!On_Site_Approval__c.Link}">here</a>.
<br/><br/>
<span style="font-weight:bold;">Account Owner</span>
<br/>
{!Account.OwnerFullName}
<br/><br/>
<span style="font-weight:bold;">Account Name</span>
<br/>
{!Account.Name}
<br/><br/>
<span style="font-weight:bold;">Account Address</span>
<br/>
{!Account.BillingStreet}
<br/>
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}
```

- Click **Next**.

Step 3 of 4

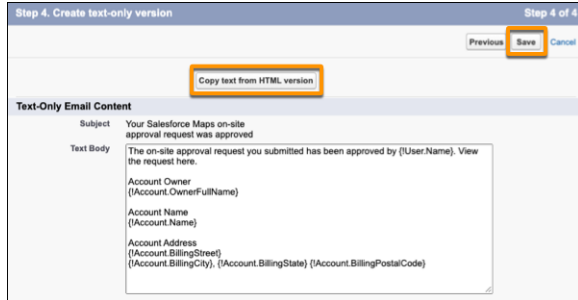
Preview Previous **Next** Cancel

**HTML Email Content** Required Information

Subject: Your Salesforce Maps on-site approval request was approved

HTML Body: The on-site approval request you submitted has been approved by (UserName). View the request <a href="{!On\_Site\_Approval\_\_c.Link}">here</a>. <br/><br/> <span style="font-weight:bold;">Account Owner</span> <br/> {!Account.OwnerFullName} <br/><br/> <span style="font-weight:bold;">Account Name</span> <br/> {!Account.Name} <br/><br/> <span style="font-weight:bold;">Account Address</span> <br/> {!Account.BillingStreet} <br/> {!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}

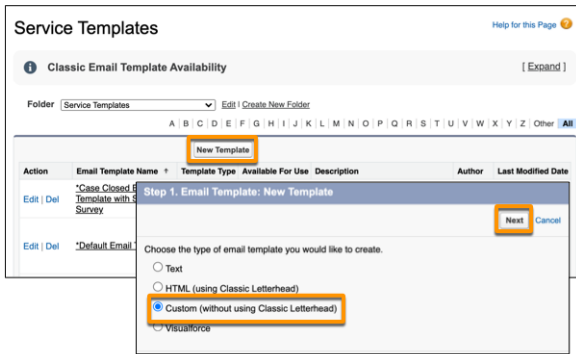
- Click **Copy text from HTML version**.
- Save your work.



### Set Up an Email Template for Denied Requests

Inform your sales and service reps when managers deny on-site visits for specific customers. A marker layer that you set up later in Salesforce Maps includes visual indicators that tell reps which customers aren't approved for visits.

1. From Setup, in the Quick Find box, enter *Templates*, then select **Classic Email Templates**.
2. Click **New Template**.
3. Select **Custom (without using Classic Letterhead)** as the template type, then click **Next**.



4. Enter the email template information.

Field	Value
Folder	Unfiled Public Classic Email Templates
Available for Use	Selected
Email Template Name	On-Site Approval Denied
Encoding	General US & Western Europe
Subject	Your Salesforce Maps on-site approval request was denied

5. Click **Next**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

- To create custom HTML email templates:
- Edit HTML Templates



Step 2 of 4

Previous **Next** Cancel

**Email Template Information** Required Information

Folder: Unified Public Classic Email Templates

Available For Use:

Email Template Name: On-Site Approval Deni

Template Unique Name: On\_Site\_Approval\_De

Encoding: Unicode (UTF-8)

Description: Email to confirm on-site visit request was denied

Subject: Your Salesforce Maps on-site approval request was denied

- Enter the code into the HTML Body as shown with this sample code. Modify the text and names as needed.

```
The on-site approval request you submitted has been denied by {!User.Name}.
View the request <a href="{!On_Site_Approval__c.Link}">here</a>.
<br/><br/>
<span style="font-weight:bold;">Account Owner</span>
<br/>
{!Account.OwnerFullName}
<br/><br/>
<span style="font-weight:bold;">Account Name</span>
<br/>
{!Account.Name}
<br/><br/>
<span style="font-weight:bold;">Account Address</span>
<br/>
{!Account.BillingStreet}
<br/>
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}
```

- Click **Next**.

Step 3 of 4

Preview Previous **Next** Cancel

**HTML Email Content** Required Information

Subject: Your Salesforce Maps on-site approval request was denied

HTML Body:
 

```
The on-site approval request you submitted has been denied by {!User.Name}.
View the request <a href="{!On_Site_Approval__c.Link}">here</a>.
<br/><br/>
<span style="font-weight:bold;">Account Owner</span>
<br/>
{!Account.OwnerFullName}
<br/><br/>
<span style="font-weight:bold;">Account Name</span>
<br/>
{!Account.Name}
<br/><br/>
<span style="font-weight:bold;">Account Address</span>
<br/>
{!Account.BillingStreet}
<br/>
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}
```

- Click **Copy text from HTML version**.
- Save your work.

Step 4 of 4

Previous **Save** Cancel

**Text-Only Email Content**

Subject: Your Salesforce Maps on-site approval request was denied

Text Body:
 

```
The on-site approval request you submitted has been denied by {!User.Name}. View the
request here.

Account Owner
{!Account.OwnerFullName}

Account Name
{!Account.Name}

Account Address
{!Account.BillingStreet}
{!Account.BillingCity}, {!Account.BillingState} {!Account.BillingPostalCode}
```

## Developing a Process to Approve On-Site Visits

Automate processes for submitting, approving, and denying requests for in-person customer visits from sales and service reps. Your reps submit requests for visits to managers through Salesforce Maps.

1. [Prepare an Approval Process](#)  
Specify which sales and service reps can submit approval requests for in-person customer visits from Salesforce Maps. Identify which managers can approve those visits.
2. [Set Up an Approval Step](#)  
Assign approval requests to managers and their delegates when sales and service reps request on-site customer visits in Salesforce Maps.
3. [Create an Action for Submitted Requests](#)  
Set up initial submission actions that automate email notifications and update status fields when your sales and service reps submit requests for in-person customer visits through Salesforce Maps.
4. [Create an Action for Approved Visits](#)  
Set up final approval actions that automate email notifications and update status fields when managers approve requests for in-person customer visits through Salesforce Maps.
5. [Create an Action for Denied Visits](#)  
Set up final rejection actions that automate email notifications and update status fields when managers deny requests from sales and service reps for in-person customer visits through Salesforce Maps.
6. [Activate the Approval Process](#)  
Let your sales and service reps submit requests for in-person customer visits through Salesforce Maps. Your approval process keeps everyone informed about submitted, approved, and denied visit requests.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### Prepare an Approval Process

Specify which sales and service reps can submit approval requests for in-person customer visits from Salesforce Maps. Identify which managers can approve those visits.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select **On-Site Approval**, then select **Create New Approval Process > Use Standard Setup Wizard**.
3. Enter a process name, such as *On-Site Approval Process*, then click **Next**.
4. For Specify Entry Criteria, select the option **criteria are met**, then click **Next**.
5. For Specify Approver Field and Record Editability Properties, select **Manager**, then click **Next**.
6. For Select Notification Templates, don't enter an approval assignment email template. Instead, click **Next**.



### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To set up approval processes:

- Customize Application

7. Add all available fields, then select the option display approval history information. For security settings, select the second option, then click **Next**.

**Step 5. Select Fields to Display on Approval Page Layout** Step 5 of 6

Previous **Next** Cancel

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields	Selected Fields
--None--	On-Site Approval Name
	Approving Manager
	Created By
	Last Modified By
	Location
	On-Site Visit Request Status
	Related To
	Status

Buttons: Add, Remove, Up, Down

[Click here to view an example](#)

**Approval Page Fields**

Display approval history information in addition to the fields selected above.

**Security Settings**

Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device.

8. For submitter type, select **Creator**, then add **Record Creator**. Select the options for page layout settings and submission settings. Save your work.

**Step 6. Specify Initial Submitters** Step 6 of 6

Previous **Save** Cancel

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

**Initial Submitters**

Submitter Type Search:  for:

Available Submitters	Allowed Submitters
--None--	Account Owner
	Record Creator

Buttons: Add, Remove

**Page Layout Settings**

Add the Submit for Approval button and Approval History related list to all On-Site Approval page layouts

**Submission Settings**

Allow submitters to recall approval requests

9. Select the last option, then click **Go**.

**What Would You Like To Do Now?** [Help for this Page](#)

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

Yes, I'd like to create an approval step now.  
 I'll do this later. Take me to the approval detail page to review what I've just created.  
 I'll do this later. Take me back to the listing of all approval processes for this object.

**Go!**

### Set Up an Approval Step

Assign approval requests to managers and their delegates when sales and service reps request on-site customer visits in Salesforce Maps.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select the approval process that you created, for example, On-Site Approval Process.
3. Click **New Approval Step**. Enter the name *On-Site Approval Submitted*. Set the step number to **1**, then click **Next**.

**Step 1. Enter Name and Description** Step 1 of 3

**Next** Cancel

Enter a name, description, and step number for your new approval step.

**Enter Name and Description** ! = Required Information

Approval Process Name: On-Site Approval Process

Name:

Unique Name:

Description:

Step Number:

4. Select **All records should enter this step**, then click **Next**.
5. Select the options:
  - **Automatically assign using the user field selected earlier.**
  - **The approver's delegate may also approve this request.**
6. Save your work.
7. Select the last option, then click **Go**.

**What Would You Like To Do Now?** [Help for this Page](#)

You have just created an approval step. You can optionally specify workflow actions to occur upon approval or rejection of this step. Would you like to do that now?

Yes, I'd like to create a new approval action for this step now.

Yes, I'd like to create a new rejection action for this step now.

No, I'll do this later. Take me to the approval process detail page to review what I've just created.

**Go!**

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To set up approval processes:

- Customize Application

### Create an Action for Submitted Requests

Set up initial submission actions that automate email notifications and update status fields when your sales and service reps submit requests for in-person customer visits through Salesforce Maps.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select the approval process that you created, for example, On-Site Approval Process.
3. Under Initial Submission Actions, click **Add New > Email Alert**.
4. Enter a description, such as *Email sent when on-site visit request is submitted*. Search for and select the email template that you created for submitted requests.

5. Select the recipient type **Creator**, then add **Record Creator**.
6. Save your work.
7. Under Initial Submission Actions, click **Add New > Field Update**.
8. Enter a name such as *Field Update for Submitted Requests*, then enter a description.

9. For the field to update, select the status field that you created for on-site visit requests, such as **On-Site Visit Request Status**. Then select the specific value for when field reps submit requests, such as **Request submitted**.
10. Save your work.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To set up approval processes:

- Customize Application

## Create an Action for Approved Visits

Set up final approval actions that automate email notifications and update status fields when managers approve requests for in-person customer visits through Salesforce Maps.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select the approval process that you created, for example, On-Site Approval Process.
3. Under Final Approval Actions, click **Add New > Email Alert**.
4. Enter a description, such as *Email sent when on-site visit request is approved*. Search for and select the email template that you created for approved requests.

5. Select the recipient type **Creator**, then add **Record Creator**.
6. Save your work.
7. Under Final Approval Actions, click **Add New > Field Update**.
8. Enter a name such as *Field Update for Approved Requests*, then enter a description.

9. For the field to update, select the status field that you created for on-site visit requests, such as **On-Site Visit Request Status**. Then select the specific value for when managers approve requests, such as **Approved**.
10. Save your work.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To set up approval processes:

- Customize Application

## Create an Action for Denied Visits

Set up final rejection actions that automate email notifications and update status fields when managers deny requests from sales and service reps for in-person customer visits through Salesforce Maps.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select the approval process that you created, for example, On-Site Approval Process.
3. Under Final Rejection Actions, click **Add New > Email Alert**.
4. Enter a description, such as *Email sent when on-site visit request is denied*. Search for and select the email template that you created for denied requests.

The screenshot shows the 'Email Alert Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel', with 'Save' highlighted by a red box. Below the buttons, the form is titled 'Edit Email Alert' and includes a 'Required Information' indicator. The form contains the following fields and sections:

- Description:** Email sent when on-site visit request is denied
- Unique Name:** Email\_sent\_when\_on\_
- Object:** On-Site Approval
- Email Template:** On-Site Approval Deni
- Recipient Type:** Search: Creator for: Find
- Recipients:**
  - Available Recipients:** --None--
  - Selected Recipients:** Record Creator
  - Buttons: Add, Remove

5. Select the recipient type **Creator**, then add **Record Creator**.
6. Save your work.
7. Under Final Rejection Actions, click **Add New > Field Update**.
8. Enter a name such as *Field Update for Denied Requests*, then enter a description.

The screenshot shows the 'Field Update Edit' interface. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel', with 'Save' highlighted by a red box. Below the buttons, the form is titled 'Field Update Edit' and includes a 'Required Information' indicator. The form contains the following fields and sections:

- Name:** Field Update for Denie
- Unique Name:** Field\_Update\_for\_Den
- Description:** Updates the status field to the specified value for denied requests
- Object:** On-Site Approval
- Field to Update:** On-Site Visit Request Status
- Field Data Type:** Picklist
- Re-evaluate Workflow Rules after Field Change:**
- Specify New Field Value:**
  - Picklist Options:**
    - The value above the current one
    - The value below the current one
    - A specific value: Denied

9. For the field to update, select the status field that you created for on-site visit requests, such as **On-Site Visit Request Status**. Then select the specific value for when managers deny requests, such as **Denied**.
10. Save your work.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To set up approval processes:

- Customize Application

### Activate the Approval Process

Let your sales and service reps submit requests for in-person customer visits through Salesforce Maps. Your approval process keeps everyone informed about submitted, approved, and denied visit requests.

1. From Setup, go to **Process Automation > Approval Processes**.
2. Select the approval process that you created, for example, On-Site Approval Process.
3. Click **Activate**, then click **OK**.

### Create On-Site Visit Requests for New Records

Automate the submission of requests for on-site visits when sales and service reps create accounts in Salesforce Maps.

1. From Setup, go to **Process Automation > Process Builder**, then click **New**.
2. Name the process and select **A record changes**.

The screenshot shows the 'New Process' configuration screen. It has the following fields:

- Process Name \***: On-Site Approval Auto-Submit
- API Name \***: On\_Site\_Ar
- Description**: Automates on-site visit request for new record
- The process starts when \***: A record changes

Buttons for 'Cancel' and 'Save' are at the bottom right.

3. Save your work.
4. Click **Add Object** and select your on-site approval object.

The screenshot shows the 'Choose Object and Specify When to Start the Process' dialog. It includes:

- Object \***: On-Site Approval
- Start the process \***:  only when a record is created
- when a record is created or edited
- Advanced** link
- Save** and **Cancel** buttons

The dialog also shows a flow diagram on the left with 'START', '+ Add Object', '+ Add Criteria', and 'STOP' steps.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To activate approval processes:

- Customize Application

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To create processes:

- Manage Flow AND View All Data



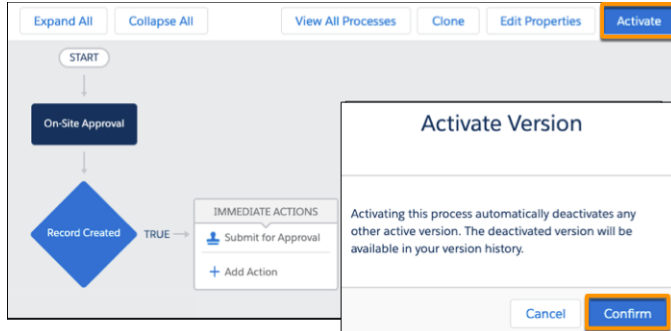
5. Select **only when a record is created**, then save your work.
6. Click **Add Criteria** and enter *Record Created* for the criteria name.

7. Select **No criteria—just execute the actions**, then save your work.
8. From **Record Created > Immediate Actions**, click **Add Action**.
9. Set options on the Select and Define Action page.

Option	Do This
Action Type	Select <b>Submit for Approval</b> .
Action Name	Enter <i>Submit for Approval</i> .
Approval Process	Select <b>Specific approval process</b> , then select the name of your approval process, for example, <b>On-Site Approval Process</b> .
Skip the entry criteria for this process?	Select <b>Yes</b> .
Submitter	Select <b>Current User</b> .

10. Save your work.

### 11. Click **Activate** > **Confirm**.



## Building the Flow for On-Site Visit Requests

Automate processes for submitting, approving, and denying requests for in-person customer visits from sales and service reps. Your reps submit requests to managers through Salesforce Maps.

### 1. [Create a Flow to Request On-Site Customer Visits](#)

Start the process that helps sales and service reps request approval for visiting customers in person. Create a flow based on an object that reps plot in Salesforce Maps. We give you guidance for reps who plot accounts, but you can adapt this process for reps who plot, for example, leads, contacts, and cases.

### 2. [Set Up a Screen That Appears When Reps Request Approvals](#)

Show your sales and service reps details about customers they want to visit. Include customer-specific info such as account names, account addresses, and names of managers who review and approve requests that reps initiate in Salesforce Maps.

### 3. [Capture On-Site Approval Details in Records](#)

Store approval statuses for each request in on-site approval records. For visit requests that your sales and service reps submit through Salesforce Maps, set up the flow to create records that include record IDs, names, and approval statuses.

### 4. [Notify Reps When Errors Prevent Submissions for Visit Requests](#)

Keep sales and service reps informed when problems prevent them from submitting requests for in-person customer visits through Salesforce Maps. Include messaging in your flow that provides your reps guidance for what to do next.

### 5. [Provide Reps Confirmation for Submitted On-Site Visit Requests](#)

Let your sales and service reps know when they submit requests for on-site customer visits in Salesforce Maps. Include messaging in your flow that, for example, tells reps to wait for manager approval before scheduling in-person meetings.

## EDITIONS

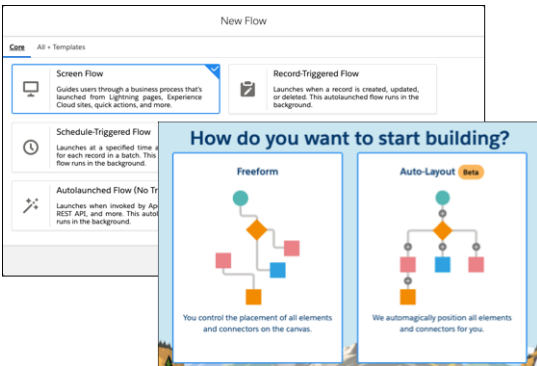
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Create a Flow to Request On-Site Customer Visits

Start the process that helps sales and service reps request approval for visiting customers in person. Create a flow based on an object that reps plot in Salesforce Maps. We give you guidance for reps who plot accounts, but you can adapt this process for reps who plot, for example, leads, contacts, and cases.

1. From Setup, in the Quick Find box, enter *Flows*, then select **Flows**.
2. Click **New Flow**. Select **Screen Flow**, then click **Next**. Select **Auto-Layout**.



3. Click **New Resource**. For the resource type, select **Variable**.
4. For the API name, enter *recordId*. For the data type, select **Text**. Select **Available for input**, then click **Done**.

5. Add an element, and select **Get Records**.

### EDITIONS

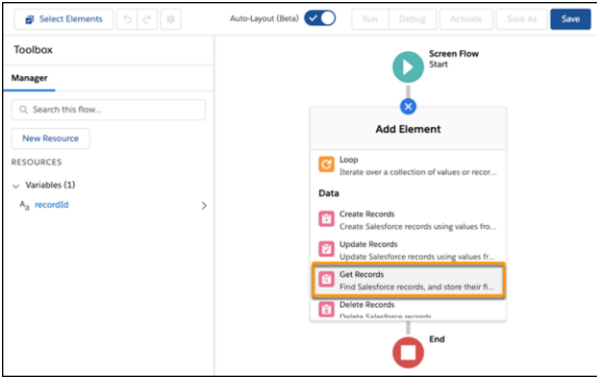
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

### USER PERMISSIONS

To create flows:

- Manage Flow



- Enter a label that relates to the object you're selecting for your flow. For example, for the Account object, enter *Get Account Record*.

New Get Records

Label:  API Name:

Description:

Get Records of This Object

Object:

Filter Account Records

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
<input type="text" value="Id"/>	<input type="text" value="Equals"/>	<input type="text" value="recordId"/>

+ Add Condition

Select the object such as **Account**. Then filter records.

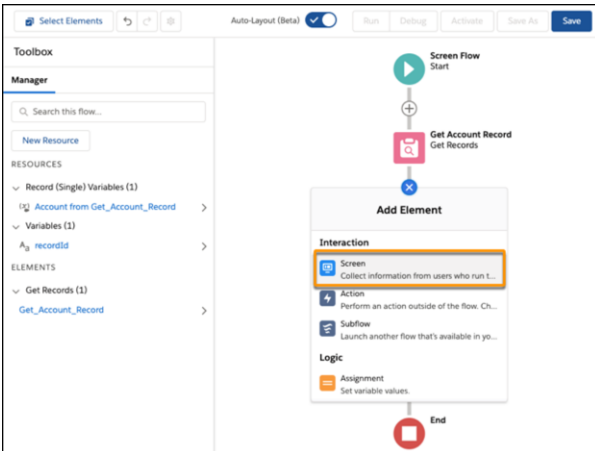
Set the filter element...	To...
Field	Id
Operator	Equals
Value	recordId

- Click **Done**.

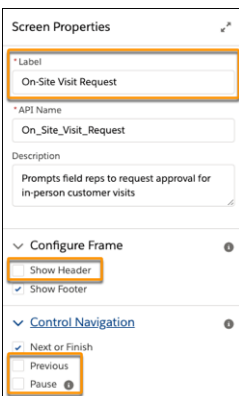
## Set Up a Screen That Appears When Reps Request Approvals

Show your sales and service reps details about customers they want to visit. Include customer-specific info such as account names, account addresses, and names of managers who review and approve requests that reps initiate in Salesforce Maps.

1. Continue building the flow from the previous procedure.
2. Add an element, then select **Screen**.



3. Add screen properties. For the label, enter *On-Site Visit Request*, then enter a description. Clear the options **Show Header**, **Previous**, and **Pause**.



4. Under Screen Components, scroll to and click **Display Text**.

### EDITIONS

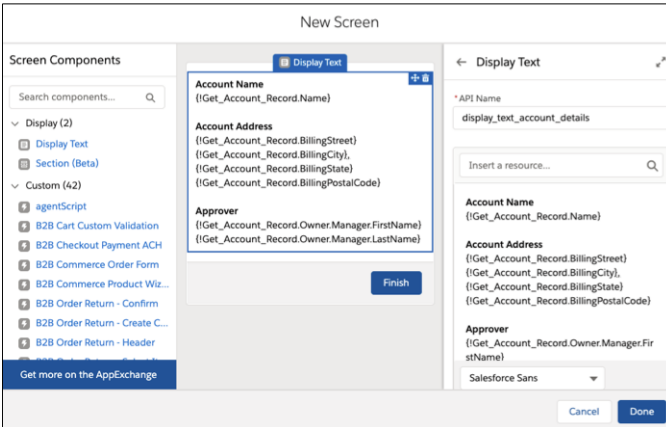
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

### USER PERMISSIONS

To create flows:

- Manage Flow



5. Enter an API name such as *display\_text\_account\_details*.
6. In the Display Text box, enter the details you want to appear for your reps as they prepare to submit an approval request. For example:

```
Account Name
{!Get_Account_Record.Name}

Account Address
{!Get_Account_Record.BillingStreet}
{!Get_Account_Record.BillingCity}, {!Get_Account_Record.BillingState}
{!Get_Account_Record.BillingPostalCode}

Approver
{!Get_Account_Record.Owner.Manager.FirstName} {!Get_Account_Record.Owner.Manager.LastName}
```

7. Click **Done**.

### Capture On-Site Approval Details in Records

Store approval statuses for each request in on-site approval records. For visit requests that your sales and service reps submit through Salesforce Maps, set up the flow to create records that include record IDs, names, and approval statuses.

1. Continue building the flow from the previous procedure.
2. Add an element, then select **Create Records**.

#### EDITIONS

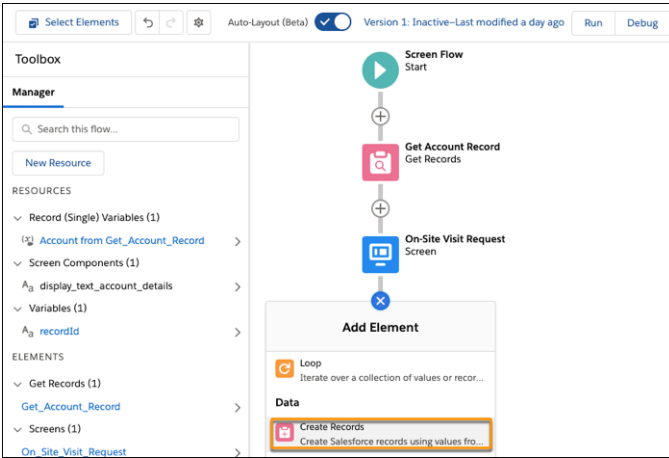
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

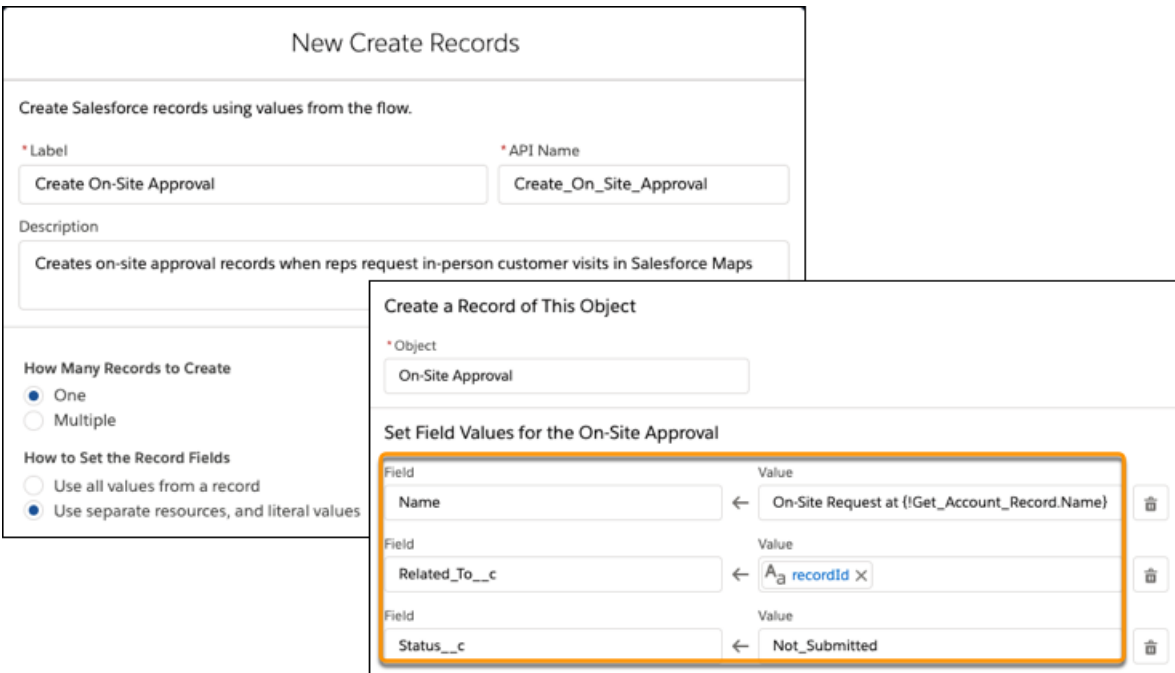
#### USER PERMISSIONS

To create flows:

- Manage Flow



- For the label, enter *Create On-Site Approval*, then enter a description. Select the option **Use separate resources, and literal values**, then select the object **On-Site Approval**.



- Set required field values.

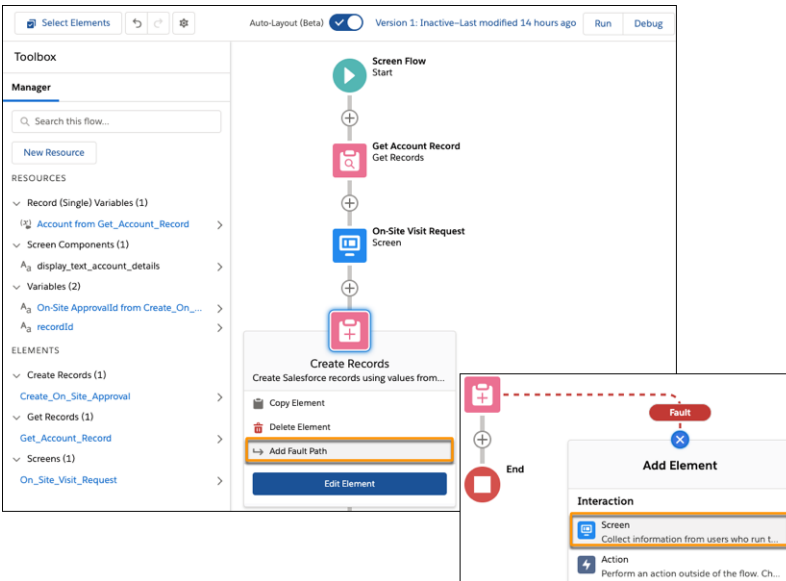
Field	Value
Name	On-Site Request at {!Get_Account_Record.Name}
Related_To__c	recordId
Status__c	Not_Submitted

### 5. Click **Done**.

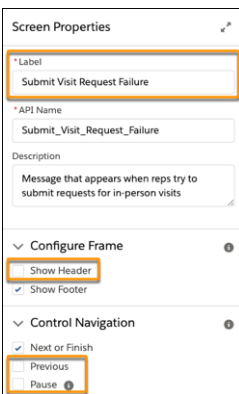
#### Notify Reps When Errors Prevent Submissions for Visit Requests

Keep sales and service reps informed when problems prevent them from submitting requests for in-person customer visits through Salesforce Maps. Include messaging in your flow that provides your reps guidance for what to do next.

1. Continue building the flow from the previous procedure.
2. Select the Create Records element. Click **Add Fault Path**, then select **Screen**.



3. Add screen properties. Enter a label, then clear the options **Show Header**, **Previous**, and **Pause**.



4. Under Screen Components, scroll to and click **Display Text**. Enter an API name and the message with any guidance you want to appear for field reps.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

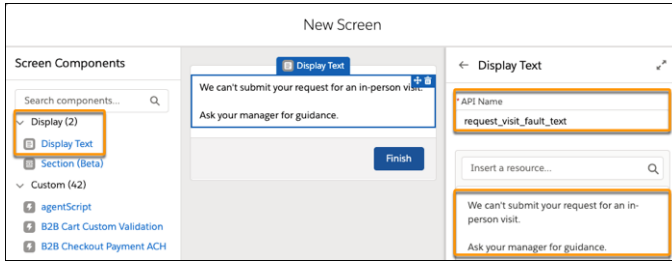
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To create flows:

- Manage Flow



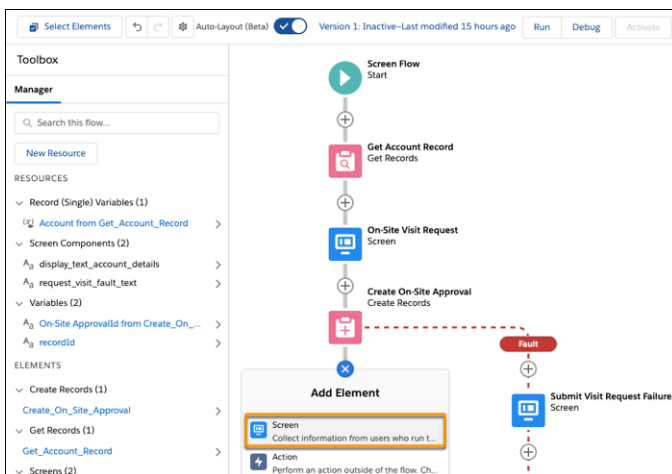


5. Click **Done**.

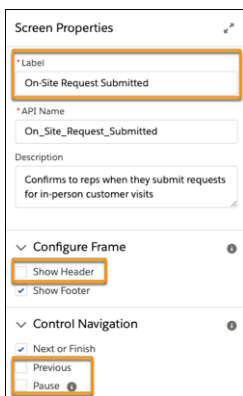
Provide Reps Confirmation for Submitted On-Site Visit Requests

Let your sales and service reps know when they submit requests for on-site customer visits in Salesforce Maps. Include messaging in your flow that, for example, tells reps to wait for manager approval before scheduling in-person meetings.

1. Continue building the flow from the previous procedure.
2. Add an element, then select **Screen**.



3. Add screen properties. Enter a label, then clear the options **Show Header**, **Previous**, and **Pause**.



EDITIONS

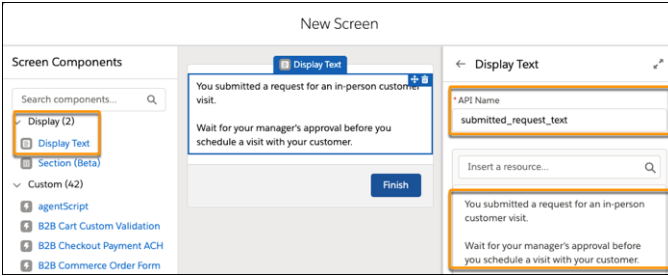
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

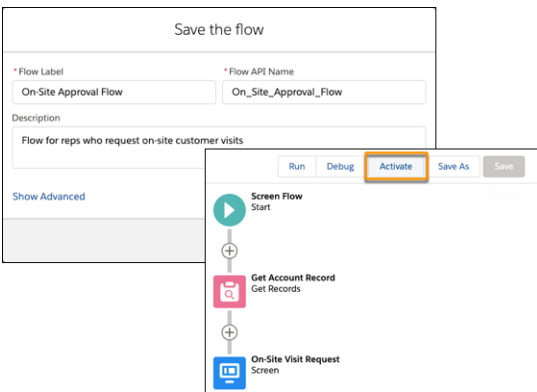
USER PERMISSIONS

- To create flows:
- Manage Flow

- Under Screen Components, scroll to and click **Display Text**. Enter an API name and the message you want to appear for field reps.



- Click **Done**.
- Save the flow, then activate it.



## Preparing Salesforce Maps for On-Site Approval Requests

Let your sales and service reps submit requests for in-person customer visits directly in Salesforce Maps. Provide visual indicators for your reps so that they identify which customers they're approved to visit.

- [Create a Custom Action to Submit On-Site Visit Requests](#)  
Set up Salesforce Maps so that your sales and service reps can submit requests for in-person customer visits. A custom action triggers the flow that you set up earlier, which prompts managers to review and respond to visit requests.
- [Set Up a Marker Layer That Shows Approval Statuses](#)  
Give your sales and service reps visual indicators that show the approval status for accounts that they plot on the map. Color-code markers on records, such as accounts, by the statuses that you created for requesting in-person customer visits through Salesforce Maps.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Create a Custom Action to Submit On-Site Visit Requests

Set up Salesforce Maps so that your sales and service reps can submit requests for in-person customer visits. A custom action triggers the flow that you set up earlier, which prompts managers to review and respond to visit requests.

1. From Setup, in the Quick Find box, enter *Installed Packages*, then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Settings > Custom Actions**.
4. Select **Create**, then enter a name for your custom action button such as *Request On-Site Visit*. Select **Activity Support** and **Verified Location Support**.

5. Select the action **Launch Visual Flow**, then enter the API name for the flow you created that prompts managers to review and respond to on-site visit requests.
6. Save your work.
7. Click **Button Set Name**, then select the button set to which you want to add the button you created.
8. Under Available Buttons, position the new button under Popup.

9. Save your work. The button appears in a marker's popup.

### EDITIONS

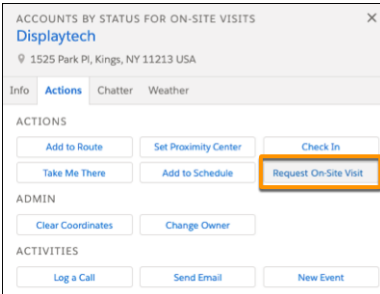
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

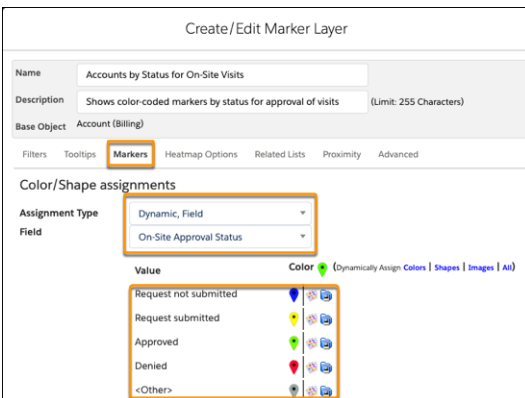
- Customize Application



### Set Up a Marker Layer That Shows Approval Statuses

Give your sales and service reps visual indicators that show the approval status for accounts that they plot on the map. Color-code markers on records, such as accounts, by the statuses that you created for requesting in-person customer visits through Salesforce Maps.

1. In Salesforce Maps, click **Layers > Saved > Personal**, then create a marker layer.
2. Select the base object whose records your reps plot on the map, such as **Account (Billing)**. Enter a name and a description for the marker layer.
3. Click **Markers**, set the assignment type to **Dynamic, Field**, then select the field you created for tracking the status of on-site approvals, such as **On-Site Approval Status**.



4. Click each marker, then select a color that represents its status.
5. Click **Save & Plot**. The colors of the markers that appear on the map correspond with their statuses.

#### EDITIONS

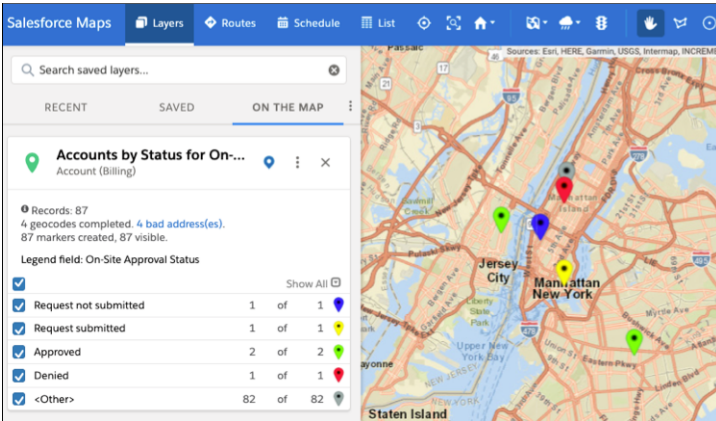
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To customize settings:

- Customize Application



## Prompting Field Reps to Respond to Safety Guidelines

Encourage your sales and service reps to minimize risk of exposure to COVID-19. Prompt them to review and respond to your company’s safety guidelines in Salesforce Maps. Automate prompts whenever your reps arrive at and depart from in-person customer visits.

### 1. [Create Fields for Safety Guidelines](#)

Capture your company’s safety guidelines for minimizing risk of exposure to COVID-19 among sales and service reps and their customers. Later, you add checkbox fields to a flow that prompts your reps to review and respond to guidelines in Salesforce Maps before visiting with customers.

### 2. [Setting Up a Flow for Responses to Safety Guidelines](#)

Automate processes to keep your sales and service reps safe and healthy during in-person customer visits. Set up a flow that creates a task for each account that your reps visit. When they check in, tasks capture your reps’ responses to your company’s COVID-19 safety guidelines—directly in Salesforce Maps.

### 3. [Connecting the Flow for Safety Guidelines to Salesforce Maps](#)

Integrate the flow for COVID-19 safety guidelines into Salesforce Maps. Prompt your sales and service reps to respond to your company’s guidelines when they check in at customer visits, and capture their responses to those guidelines in tasks.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Create Fields for Safety Guidelines

Capture your company's safety guidelines for minimizing risk of exposure to COVID-19 among sales and service reps and their customers. Later, you add checkbox fields to a flow that prompts your reps to review and respond to guidelines in Salesforce Maps before visiting with customers.

1. From Object Manager in Setup, select **Activity**.
2. Click **Fields & Relationships > New**, select **Checkbox**, then click **Next**.
3. Enter a label and set the default value to **Unchecked**. Add a description such as the safety guideline for the checkbox field, then click **Next**.

The screenshot shows a 'Step 2. Enter the details' dialog box for creating a checkbox field. The 'Field Label' is 'Maintain Distance'. The 'Default Value' is set to 'Unchecked'. The 'Field Name' is 'Maintain Distance'. The 'Description' is 'I agree to maintain a distance of at least 6 feet (~2 meters) from others and to not shake hands or share or exchange items.' There are 'Previous', 'Next', and 'Cancel' buttons at the top and bottom of the dialog.

When you create a flow later in the process, you create a field label that reflects the safety guideline for this checkbox field.

4. Accept the field-level security settings, then click **Next**.
5. Add the field to page layouts, then click **Save & New**.
6. Repeat the procedure for each safety guideline that you want in a checkbox field.

### SEE ALSO:

[Salesforce Help: Create Custom Fields](#)

## Setting Up a Flow for Responses to Safety Guidelines

Automate processes to keep your sales and service reps safe and healthy during in-person customer visits. Set up a flow that creates a task for each account that your reps visit. When they check in, tasks capture your reps' responses to your company's COVID-19 safety guidelines—directly in Salesforce Maps.

1. [Create a Flow for an Object That Reps Plot on the Map](#)

Start developing the process that prompts sales and service reps to respond to your company's COVID-19 safety guidelines. Create a flow based on an object that reps plot in Salesforce Maps. We give you guidance for reps who plot accounts on the map, but you can adapt this process for reps who plot, for example, leads, contacts, and cases.

2. [Set Up a Screen That Appears When Reps Check In to Visits](#)

Create a screen that includes your company's safety guidelines for minimizing the risk of exposure to COVID-19 among your sales and service reps and their customers. When reps check in at their customer visits in Salesforce Maps, they review and respond to those guidelines, which help ensure everyone's health.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create fields:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### 3. [Capture Responses to Safety Guidelines in Tasks](#)

Store your sales and service reps' responses to your company's COVID-19 safety guidelines in tasks. When your reps check in at customer visits using Salesforce Maps, the flow that you set up shows your reps a screen that includes checkboxes for each safety guideline. The flow then captures responses in related tasks.

### 4. [Notify Reps When Errors Prevent Responses to Safety Guidelines](#)

Keep sales and service reps informed when problems prevent Salesforce from capturing their responses to your company's COVID-19 safety guidelines. Include messaging in your flow that sets expectations for and provides guidance to reps directly in Salesforce Maps so that they keep themselves and their customers healthy.

### 5. [Provide Reps Confirmation for Responses to Safety Guidelines](#)

Let your sales and service reps know when Salesforce captures their responses to your company's COVID-19 safety guidelines that appear in Salesforce Maps. Include messaging in your flow that, for example, encourages reps to practice social distancing and wash hands before and after visits.

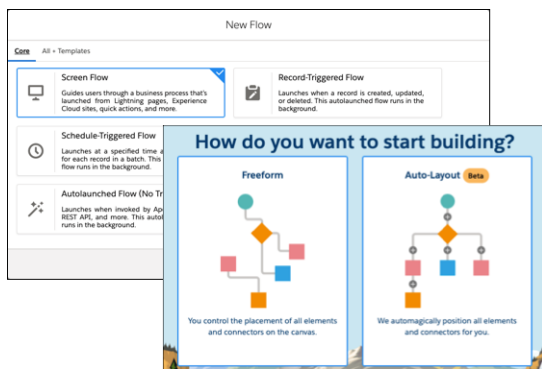
#### SEE ALSO:

[Salesforce Help: Flow Builder Tour](#)

#### Create a Flow for an Object That Reps Plot on the Map

Start developing the process that prompts sales and service reps to respond to your company's COVID-19 safety guidelines. Create a flow based on an object that reps plot in Salesforce Maps. We give you guidance for reps who plot accounts on the map, but you can adapt this process for reps who plot, for example, leads, contacts, and cases.

1. From Setup, in the Quick Find box, enter *Flows*, then select **Flows**.
2. Click **New Flow**. Select **Screen Flow**, then click **Next**. Select **Auto-Layout**.



3. Click **New Resource**. For the resource type, select **Variable**.

4. For the API name, enter *recordId*. For the data type, select **Text**. Select **Available for input**, then click **Done**.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

- To create flows:
- Manage Flow

**New Resource**

\*Resource Type  
Variable

\*API Name  
recordId

Description  
Associates records with markers on the map.

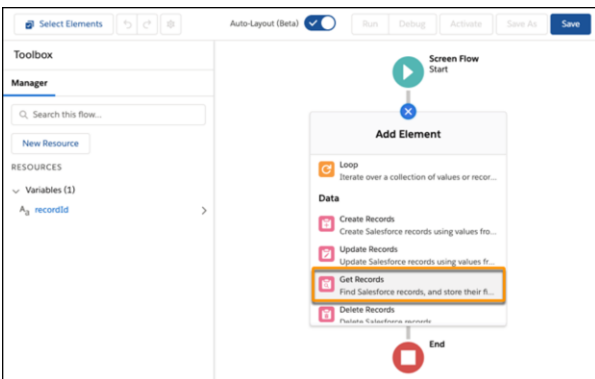
\*Data Type  
Text  Allow multiple values (collection)

Default Value  
Enter value or search resources...

Availability Outside the Flow  
 Available for input  
 Available for output

Cancel Done

5. Add an element, then select **Get Records**.



6. Enter a label that relates to the object you're selecting for your flow. For example, for the Account object, enter *Get Account Record*.

**New Get Records**

Label  
Get Account Record

\*API Name  
Get\_Account\_Record

Description  
Gets account records.

Get Records of This Object  
\*Object  
Account

Filter Account Records  
Condition Requirements  
All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	recordId

+ Add Condition

Select the object such as **Account**, then filter its records.

Set this filter element...	To...
Field	Id



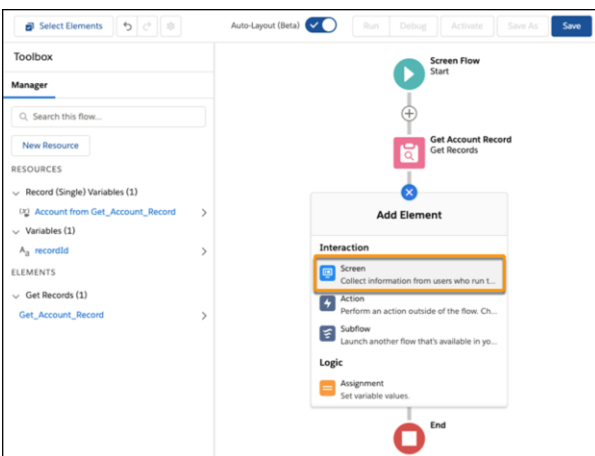
Set this filter element...	To...
Operator	Equals
Value	recordId

### 7. Click **Done**.

## Set Up a Screen That Appears When Reps Check In to Visits

Create a screen that includes your company's safety guidelines for minimizing the risk of exposure to COVID-19 among your sales and service reps and their customers. When reps check in at their customer visits in Salesforce Maps, they review and respond to those guidelines, which help ensure everyone's health.

1. Continue building the flow from the previous procedure.
2. Add an element, then select **Screen**.



3. Add screen properties. For the label, enter *Safety Checklist*, then enter a description. Clear the options **Show Header** and **Pause**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To create flows:

- Manage Flow

**Screen Properties**

\* Label  
Safety Checklist

\* API Name  
Safety\_Checklist

Description  
Prompts field reps to acknowledge safety guidelines before in-person appointments.

▼ **Configure Frame**

Show Header

Show Footer

▼ **Control Navigation**

Next or Finish

Previous

Pause

- Under Screen Components, click **Checkbox**.

**New Screen**

Screen Components

Search components... Q

▼ Input (41)

- Action Plan Template
- Address
- Appointment Scheduling
- Call Script
- Cancel Appointment
- Checkbox**
- Checkbox Group
- Currency
- Date
- Date & Time

Preview:  I have measured my body temperature within the last 3 hours, and the reading was lower than 100.4°F or 38°C.

▼ **Checkbox**

Label  
I have measured my body temperature with

\* API Name  
Body\_Temperature

Default Value  
!\$GlobalConstant.False

> Set Component Visibility

> Validate Input

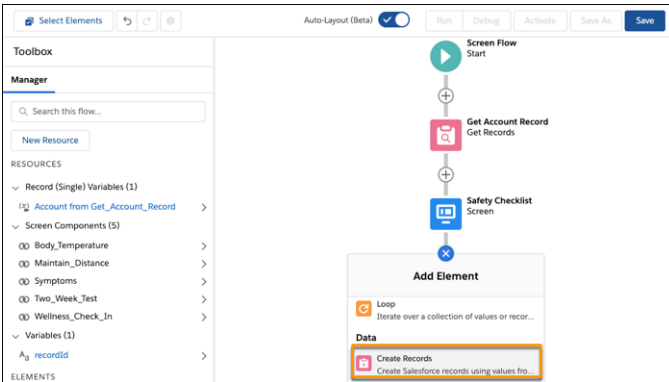
> Provide Help

- Enter the label you want to appear for your field reps. The label represents one of your company's safety guidelines.
- Replace the API name with the checkbox field name that corresponds with the guideline.
- Set the default value to **!\$GlobalConstant.False**.
- Repeat steps 4 through 7 for each safety guideline, then click **Done**.

### Capture Responses to Safety Guidelines in Tasks

Store your sales and service reps' responses to your company's COVID-19 safety guidelines in tasks. When your reps check in at customer visits using Salesforce Maps, the flow that you set up shows your reps a screen that includes checkboxes for each safety guideline. The flow then captures responses in related tasks.

1. Continue building the flow from the previous procedure.
2. Add an element, then select **Create Records**.



#### EDITIONS

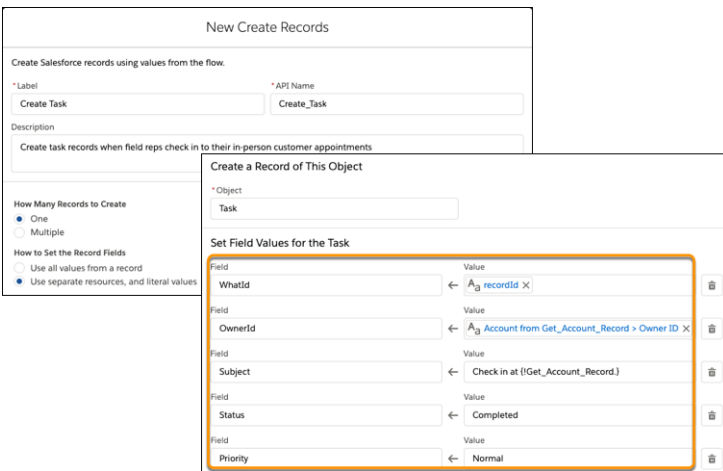
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

- To create flows:
- Manage Flow

3. For the label, enter *Create Task*, then enter a description. Select the option **Use separate resources, and literal values**, then select the object **Task**.

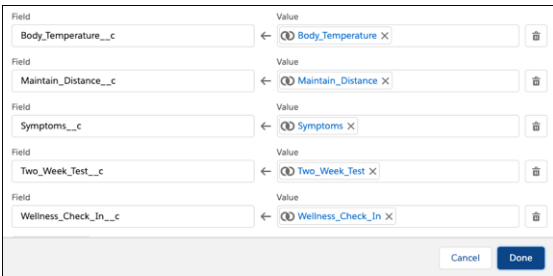


4. Set required field values.

Field	Value
WhatId	recordId
OwnerId	!Get_Account_Record.OwnerId
Subject	Check-in at !Get_Account_Record.Name
Status	Completed

Field	Value
Priority	Normal

5. Add the checkbox fields that you created for each safety guideline. In **Field**, enter the API name for one of the checkbox fields you created. In **Value**, enter the component that corresponds with the checkbox field. Repeat for each checkbox field.

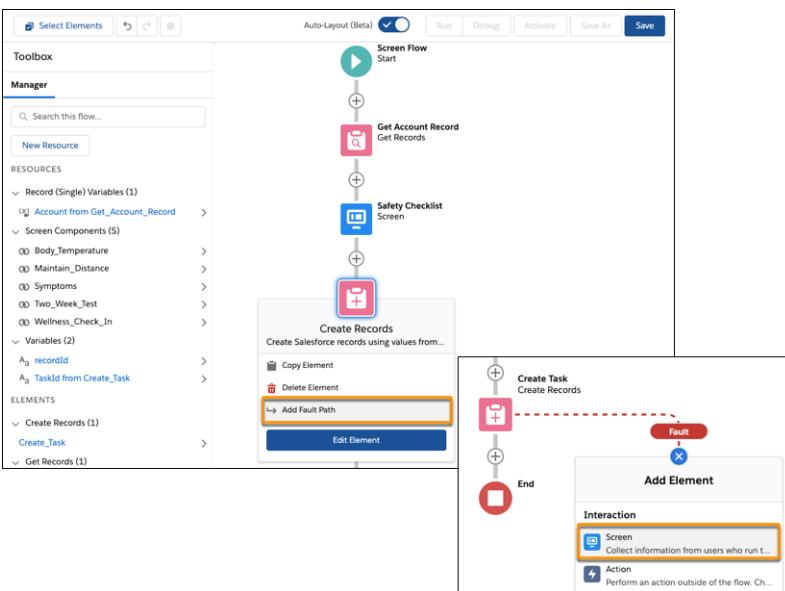


6. Click **Done**.

### Notify Reps When Errors Prevent Responses to Safety Guidelines

Keep sales and service reps informed when problems prevent Salesforce from capturing their responses to your company’s COVID-19 safety guidelines. Include messaging in your flow that sets expectations for and provides guidance to reps directly in Salesforce Maps so that they keep themselves and their customers healthy.

1. Continue building the flow from the previous procedure.
2. Select the Create Records element, click **Add Fault Path**, then select **Screen**.



3. Add screen properties. Enter a label, then clear the options **Show Header**, **Previous**, and **Pause**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

- To create flows:
- Manage Flow

Screen Properties

\* Label  
Create Task Failure Message

\* API Name  
Create\_Task\_Failure\_Message

Description

▼ Configure Frame

Show Header

✓ Show Footer

▼ Control Navigation

✓ Next or Finish

✓ Previous

Pause

- Under Screen Components, scroll to and click **Display Text**. Enter an API name and the message with any guidance you want to appear for field reps.

New Screen

Screen Components

Search components... Q

▼ Display (2)

Display Text

Section (Beta)

Custom (33)

agentScript

B2B Checkout Payment ACH

B2B Commerce Order Form

B2B Commerce Product Wiz...

B2B Order Return - Confirm

Display Text

We can't record your responses to your company's safety items.  
Ask your manager for guidance.

Finish

Display Text

API Name  
create\_task\_failure\_text

Insert a resource... Q

We can't record your responses to your company's safety items.  
Ask your manager for guidance.

Salesforce Sans

- Click **Done**.

Provide Reps Confirmation for Responses to Safety Guidelines

Let your sales and service reps know when Salesforce captures their responses to your company's COVID-19 safety guidelines that appear in Salesforce Maps. Include messaging in your flow that, for example, encourages reps to practice social distancing and wash hands before and after visits.

- Continue building the flow from the previous procedure.
- Add an element, then select **Screen**.

#### EDITIONS

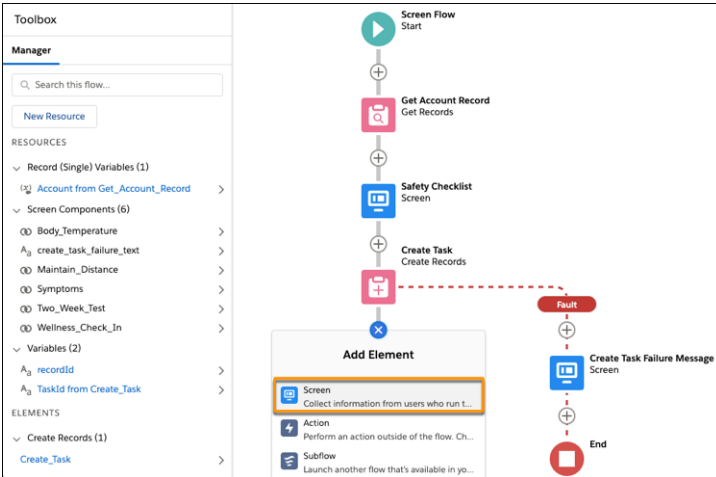
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

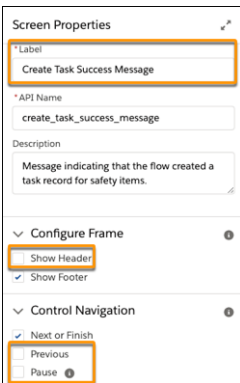
#### USER PERMISSIONS

To create flows:

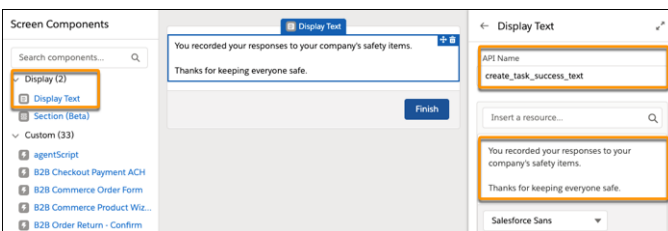
- Manage Flow



3. Add screen properties. Enter a label, then clear the options **Show Header**, **Previous**, and **Pause**.



4. Scroll to and drag **Display Text** to the center. Enter an API name and the message you want to appear for field reps.



5. Click **Done**.
6. Save the flow.

## Connecting the Flow for Safety Guidelines to Salesforce Maps

Integrate the flow for COVID-19 safety guidelines into Salesforce Maps. Prompt your sales and service reps to respond to your company's guidelines when they check in at customer visits, and capture their responses to those guidelines in tasks.

### 1. [Create a Custom Action That Triggers the Flow for Safety Guidelines](#)

Prompt sales and service reps to review and respond to your company's COVID-19 safety guidelines. You set up a custom action in Salesforce Maps so that when your reps check in at customer visits, the flow begins.

### 2. [Add the Custom Action for Safety Guidelines to Button Sets](#)

Apply the custom action that triggers the flow for your company's COVID-19 safety guidelines to button sets in Salesforce Maps. That way, when sales and service reps check in at customer visits, the flow you created prompts them to review and respond to the guidelines.

### 3. [Test the Flow That Captures Responses to Safety Guidelines](#)

Confirm that the flow you created for capturing responses to your company's COVID-19 safety guidelines works the way you intend in Salesforce Maps. Prepare to roll out the process to your sales and service teams so that everyone gets the guidance and support they deserve to meet with customers safely.

## Create a Custom Action That Triggers the Flow for Safety Guidelines

Prompt sales and service reps to review and respond to your company's COVID-19 safety guidelines. You set up a custom action in Salesforce Maps so that when your reps check in at customer visits, the flow begins.

1. From Setup, in the Quick Find box, enter *Installed Packages*, then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Settings > Custom Actions**.
4. Select **Create New**, then give your custom action button a name. Select **Activity Support** and **Verified Location Support**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

General Button Sets **Custom Actions** Activity Settings

\* Custom Actions  
--Create New--

Basic Info

\* Name  
Safety Guidelines

Modes

Desktop  
 Mobile

Requirements

Activity Support  
 Verified Location Support

CONTACT or LEAD

Routine

\* Action  
Launch Visual Flow

\* Flow API Name  
Safety\_Checklist\_for\_In\_Person\_Visits

Save

5. Select the action **Launch Visual Flow**, then enter the API name for the flow you created that prompts reps to review and respond to safety guidelines.
6. Save your work.

### Add the Custom Action for Safety Guidelines to Button Sets

Apply the custom action that triggers the flow for your company's COVID-19 safety guidelines to button sets in Salesforce Maps. That way, when sales and service reps check in at customer visits, the flow you created prompts them to review and respond to the guidelines.

1. In Salesforce Maps Settings, select **Button Set Name**.
2. Select the button set that you want to add the custom action button to.
3. Find the new button that triggers the flow for your company's safety guidelines, then drag it where you want it to appear in the Popup layout.

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

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

4. Save your work.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

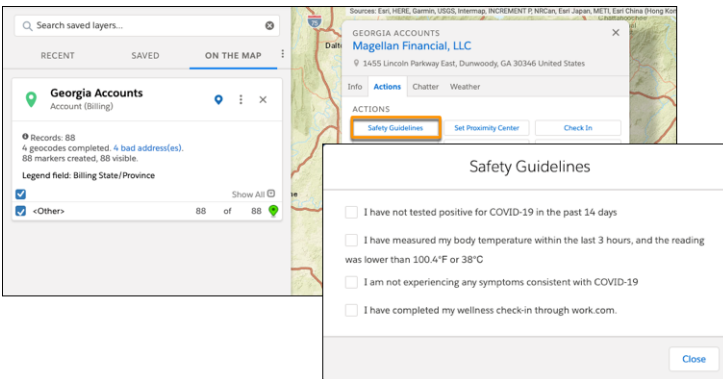
- Customize Application



## Test the Flow That Captures Responses to Safety Guidelines

Confirm that the flow you created for capturing responses to your company's COVID-19 safety guidelines works the way you intend in Salesforce Maps. Prepare to roll out the process to your sales and service teams so that everyone gets the guidance and support they deserve to meet with customers safely.

1. In Salesforce Maps, plot a layer whose object corresponds with the flow that you created for your company's safety guidelines. For example, if you built your flow based on the Account object, plot accounts.
2. Click a marker, then select **Actions**. Click the button that you added to your button set.



3. Review and respond to the guidelines. Click **Next**, then click **Finish**. Salesforce records responses in a task related to the account.

## Identifying Trends for New COVID-19 Cases

Give sales and service managers and their field reps tools to use to make informed decisions before they schedule in-person customer visits. Show trends over 14-day moving averages within US counties in Salesforce Maps. Adding an ArcGIS layer shows uptrends, downtrends, and trend duration.

### 1. [Give Managers and Field Reps Access to ArcGIS Trend Data](#)

Provide access to the ArcGIS data layer that helps sales and service managers and their field reps identify trends for new COVID-19 cases by US county directly in Salesforce Maps.

### 2. [Set Up Connections That Provide Access to ArcGIS Trend Data](#)

Establish two connections to ArcGIS data in Salesforce. Then the data layer that you create in Salesforce Maps shows trends by US county for new COVID-19 cases compared with 14-day moving averages.

### 3. [Create and Plot an ArcGIS Layer](#)

Help sales and service managers track trends by US county for new COVID-19 cases compared with 14-day moving averages. Adding an ArcGIS layer in Salesforce Maps shows whether the trends are increasing or decreasing and their duration.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## USER PERMISSIONS

To customize settings:

- [Customize Application](#)

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Give Managers and Field Reps Access to ArcGIS Trend Data

Provide access to the ArcGIS data layer that helps sales and service managers and their field reps identify trends for new COVID-19 cases by US county directly in Salesforce Maps.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Permission Groups**.
4. To give a permission group access to the ArcGIS data layer, select **Enable ArcGIS Layers**.

Setting	Value	Allow User Override
Maximum Records to Plot	50000	
Maximum Records to Plot for External Objects	2000	
Folder Administrator	<input checked="" type="checkbox"/>	
Show User Folders	<input checked="" type="checkbox"/>	
Show Personal Folders	<input checked="" type="checkbox"/>	
Enable ArcGIS Layers	<input checked="" type="checkbox"/>	
Manage Data Layers	<input checked="" type="checkbox"/>	
Manage Data Sources	<input checked="" type="checkbox"/>	

5. Save your changes.

## Set Up Connections That Provide Access to ArcGIS Trend Data

Establish two connections to ArcGIS data in Salesforce. Then the data layer that you create in Salesforce Maps shows trends by US county for new COVID-19 cases compared with 14-day moving averages.

1. From Setup, in the Quick Find box, enter *Remote Site Settings*, and then select **Remote Site Settings**.
2. Click **New Remote Site**.
3. Give the first remote site a name of your choice, such as ArcGIS\_Services. Enter the remote site URL `https://services7.arcgis.com`, and then click **Save & New**.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

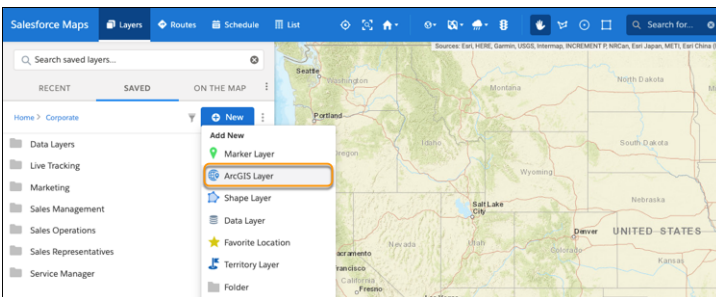
- Customize Application

4. Give the second remote site a name of your choice, such as ArcGIS\_Online\_Services. Enter the remote site URL <https://services.arcgisonline.com>.
5. Save your changes.

## Create and Plot an ArcGIS Layer

Help sales and service managers track trends by US county for new COVID-19 cases compared with 14-day moving averages. Adding an ArcGIS layer in Salesforce Maps shows whether the trends are increasing or decreasing and their duration.

1. In Salesforce Maps, select **Layers > Saved > Corporate**.
2. Click **New > ArcGIS Layer**.



3. Give the ArcGIS layer a name and enter a description. Then enter the URL <https://sfmaps.maps.arcgis.com/home/webmap/viewer.html?webmap=da18f557032842c8b8b81cdf96d15010>.

4. Save your changes.
5. Plot the layer that you created.

### EDITIONS

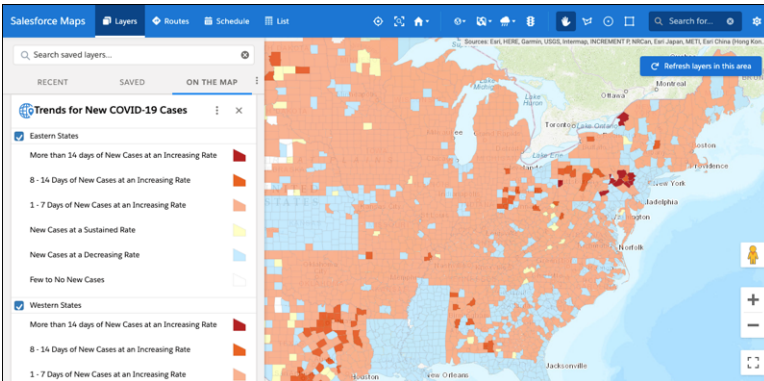
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application



The layer shows trends for new COVID-19 cases over a 14-day moving average.

## Simplifying and Automating Processes for Field Reps

Help field reps spend less time tending to administrative duties and more time cultivating customer relationships using Salesforce Maps.

### [Automating Assignments for Salesforce Records](#)

Avoid the hassle of manually assigning Salesforce records. Assign them to particular owners or users in your territories based on conditions that you specify in Salesforce Maps assignment plans and rules.

### [Configuring Schedules](#)

Fine-tune the way Salesforce Maps relates the scheduled events it adds to Salesforce calendars. When tracking events based on custom activity objects with defined start and end times or durations, give your reps the option to add those events to their schedules. You determine how to relate the events to Salesforce records.

### [Configuring Check In Settings](#)

Let sales and service reps log activities and notes from the field using a convenient button on their mobile devices. Customize the Check In experience by creating custom activity fields, a custom disposition, and specific settings for each base object in Salesforce Maps.

### [Letting Reps Create Leads and Accounts from Salesforce Maps](#)

Save your sales and service reps time when you let them create leads and accounts using the property and business data available in Salesforce Maps. Your reps can also create records from points of interest, their current location, and any other areas on the map using Click2Create.

### [Showing Nearby Maps in Salesforce Records and on Sites](#)

Bring context to records and sites when you add a Salesforce Maps component to page and site layouts. Select from standard maps for accounts, contacts, cases, leads, and opportunities. Or create custom maps that show the records or filtered layers of your choice.

### [Plot Specific Layers for Reps when They Start Sessions](#)

Show the layers that managers and operations want to appear when reps start their sessions in Salesforce Maps. That way, your reps can jump right into their work without searching for critical details. For example, set marker, data, and ArcGIS layers that give reps more context for sales and service work in their respective areas.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Automating Assignments for Salesforce Records

Avoid the hassle of manually assigning Salesforce records. Assign them to particular owners or users in your territories based on conditions that you specify in Salesforce Maps assignment plans and rules.

### 1. [Configure Record Assignments](#)

Automate assignments for the records that matter to your sales and service teams in Salesforce Maps. To automate assignments for records other than accounts and leads, such as campaigns and cases, create lookup relationships for those records' objects.

### 2. [Set Up Plans for Record Assignments](#)

Outline the details of what you want Salesforce Maps to assign in assignment plans. Assign record owners, users, or both to records for the objects that you include in as many as 50 plans. For example, filter the records to reassign a rep to accounts that earn a certain amount of annual revenue.

### 3. [Determine Record Assignments in Rules](#)

Put your assignment plan into action when you add as many as 5,000 rules across your assignment plans in Salesforce Maps. For example, to assign a rep to the Southwest territory, create a rule that assigns the Southwest territory shape layer to the rep.

### 4. [Schedule and Run Record Assignments](#)

Assign records to the right sales and service reps when you automate assignment plans to run on an interval that you choose in Salesforce Maps. Or run ad hoc assignment when the needs arise.

#### EDITIONS

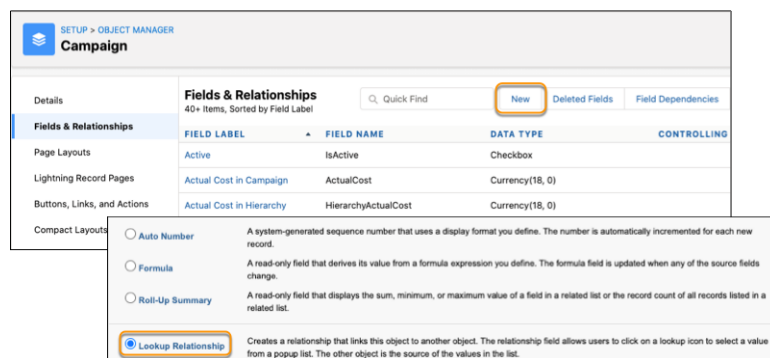
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Configure Record Assignments

Automate assignments for the records that matter to your sales and service teams in Salesforce Maps. To automate assignments for records other than accounts and leads, such as campaigns and cases, create lookup relationships for those records' objects.

- From Setup, click **Object Manger**, and then select the object whose records you want to assign.
- Click **Fields & Relationships > New**. Select **Lookup Relationship**, then click **Next**.



- Select the assignment rule object, then click **Next**. Enter a field label and name, set any other options, then click **Next**.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To customize settings:

- [Customize Application](#)

**Step 2. Choose the related object** Step 2 of 6

Select the other object to which this object is related.

Related To: **Maps Assignment Rule**

---

**Step 3. Enter the label and name for the lookup field** Step 3 of 6

Field Label: **Maps Assignment Rule**

Field Name: **Maps\_Assignment\_Rule**

Description: **Lookup relationship for Salesforce Maps assignment rules**

Child Relationship Name: **Campaigns**

Required:  Always require a value in this field in order to save a record

What to do if the lookup record is deleted?  Clear the value of this field. You can't choose this option if you make this field required.  Don't allow deletion of the lookup record that's part of a lookup relationship.

4. Set field-level security for the lookup field, then click **Next**.
5. Select **Add Field** for the page layout, then click **Next**. Confirm the custom related list options.

**Step 5. Add reference field to Page Layouts** Step 5 of 6

Field Label: **Maps Assignment Rule**

Data Type: **Lookup**

Field Name: **Maps\_Assignment\_Rule**

Description: **Lookup relationship for Salesforce Maps assignment rules**

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the Record Types.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Campaign Layout
<input checked="" type="checkbox"/>	Parent Campaign Layout
<input checked="" type="checkbox"/>	Partner-Led Campaign
<input checked="" type="checkbox"/>	Partner-Led Campaign

---

**Step 6. Add custom related lists** Step 6 of 6

Field Label: **Maps Assignment Rule**

Data Type: **Lookup**

Field Name: **Maps\_Assignment\_Rule**

Description: **Lookup relationship for Salesforce Maps assignment rules**

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label: **Campaigns**

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear, you will need to customize the Record Types.

Add Related List	Page Layout Name
<input checked="" type="checkbox"/>	Maps Assignment Rule Layout

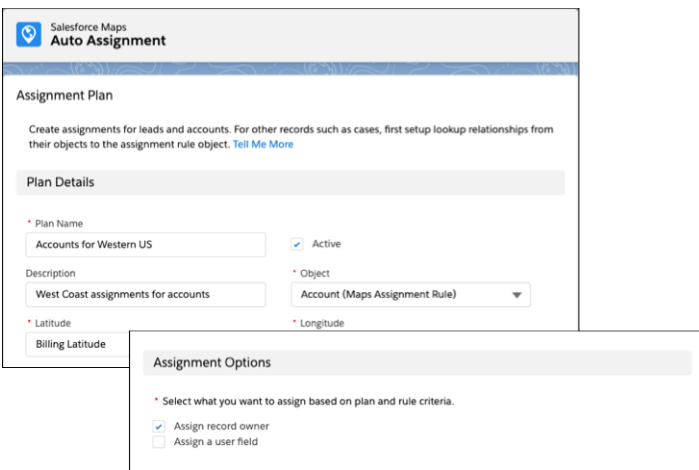
Append related list to users' existing personal customizations

6. Save your work.

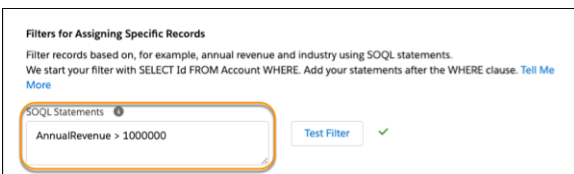
### Set Up Plans for Record Assignments

Outline the details of what you want Salesforce Maps to assign in assignment plans. Assign record owners, users, or both to records for the objects that you include in as many as 50 plans. For example, filter the records to reassign a rep to accounts that earn a certain amount of annual revenue.

1. From Setup, in the Quick Find box, enter *Installed Packages*, then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Click **Auto Assignment > Create a Plan**.
4. Enter a name for the assignment plan, and select the object for the records that you want to assign. Select latitude and longitude fields, and ensure that they're mapped to the appropriate coordinate fields on the object. Then specify whether to assign record owners, a specific user field, or both.



5. To assign a subset of records, enter a SOQL filter and then test it. Add statements after the WHERE clause.



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- To customize settings:
- Customize Application

For example, to create an assignment plan that assigns...	Enter the SOQL statement...
Sales reps to accounts that exceed \$1,000,000 in revenue	<code>AnnualRevenue &gt; 1000000</code>
Sales reps to accounts that earn less than \$1,000,000 in revenue	<code>AnnualRevenue &lt; 1000000</code>
Records associated with the apparel industry to reps who specialize in it	<code>Industry = 'Apparel'</code>

6. Save your work.

SEE ALSO:

[SOQL and SOSL Reference: Salesforce Object Query Language \(SOQL\)](#)

## Determine Record Assignments in Rules

Put your assignment plan into action when you add as many as 5,000 rules across your assignment plans in Salesforce Maps. For example, to assign a rep to the Southwest territory, create a rule that assigns the Southwest territory shape layer to the rep.

1. Confirm that you have a shape layer that represents an area such as a territory that you want to assign.
2. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
3. Next to the Salesforce Maps package, click **Configure**.
4. Click **Auto Assignment** > **Assignment Plans**, and then select an assignment plan. Scroll to Assignment Rules, then add rules to your assignment plan.

The screenshot displays the Salesforce Maps Auto Assignment configuration page. It is divided into two main sections: Assignment Plans and Assignment Rules.

**Assignment Plans:** A table lists existing plans. The 'Accounts for Western US' plan is highlighted.

Status	Plan Name	Object	Description	Rules	Created On
Active	Accounts for Western US	Account	West Coast assignments for accounts	2	8/9/2021 3:34 PM
Active	Pacific Nor...				
Active	Northern C...				

**Assignment Rules:** A table lists rules for the selected plan. Two rules are shown: 'Northern California As...' and 'Southern Oregon Assig...'. The 'Add Rule' button is highlighted.

Status	Rule Name	Shape Layer	User
Active	Northern California As...	Northern California	Michael Occhineri
Active	Southern Oregon Assig...	Southern Oregon	Felix Ayaso

**Add Rule Dialog:** A modal window for creating a new rule. The 'Rule Name' is 'Southwest Assignments', the 'Shape Layer' is 'Southwest', and the 'User' is 'Felix Ayaso'. The 'Active' checkbox is checked.

5. Save your work.

SEE ALSO:

[Create Shape Layers](#)

### EDITIONS

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### USER PERMISSIONS

To customize settings:

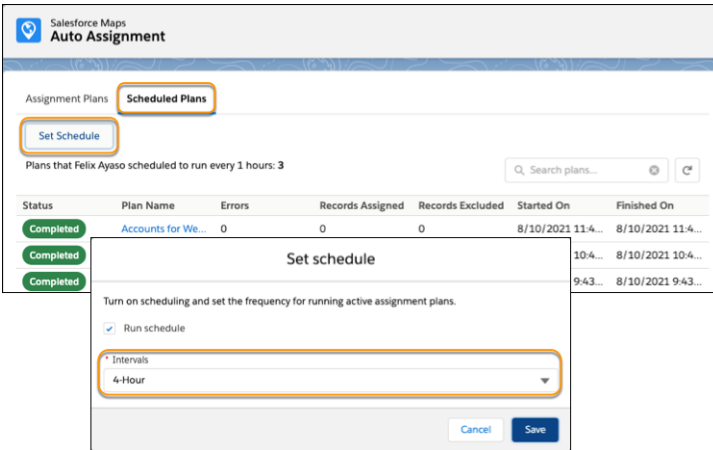
- Customize Application



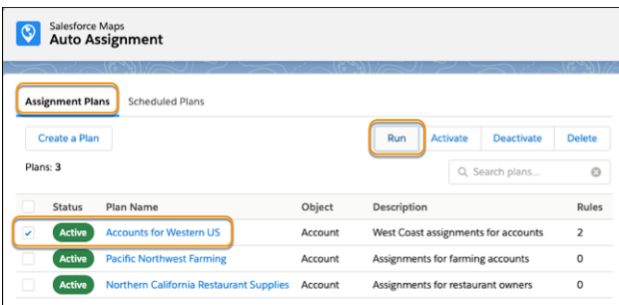
## Schedule and Run Record Assignments

Assign records to the right sales and service reps when you automate assignment plans to run on an interval that you choose in Salesforce Maps. Or run ad hoc assignment when the needs arise.

1. From Setup, in the Quick Find box, enter *Installed Packages*, then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Click **Auto Assignment > Scheduled Plans > Set Schedule**. Select the interval that you want for running assignment plans. Then save your work.



4. To run ad hoc assignments, click **Assignment Plans**. Select the assignment plans that you want to run now, then click **Run**.



SEE ALSO:

[Apex Developer Guide: Execution Governors and Limits](#)

### EDITIONS

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### USER PERMISSIONS

To customize settings:

- Customize Application

## Configuring Schedules

Fine-tune the way Salesforce Maps relates the scheduled events it adds to Salesforce calendars. When tracking events based on custom activity objects with defined start and end times or durations, give your reps the option to add those events to their schedules. You determine how to relate the events to Salesforce records.

### [Give Reps Permission to Edit Object Locations](#)

Increase reps' sales schedule efficiency when you give them access to add locations to records. Calendar events for records without location information aren't plotted on the map. Ensure that reps can add location information to records so they can visualize those calendar events in Salesforce Maps. Apply the principle of least privilege by restricting access to objects with permission sets.

### [Set Up Schedules to Include Custom Activities](#)

Let your reps add custom activities with defined start and end times or durations to their schedules in Salesforce Maps. You determine how to relate those events to Salesforce records.

### [Assign Specific Event Types to Meetings](#)

Specify the default Salesforce event types that you want to assign from the meetings your reps schedule in Salesforce Maps. Assigning event types gives, for example, managers insight to the types of events that their reps schedule, such as meetings, calls, and email messages.

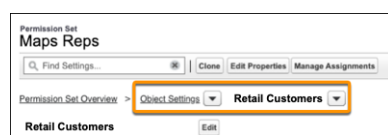
### [Exclude Specific Events and Activities from Schedules](#)

Partner with your Salesforce admin to exclude specific events and custom activities, such as all-day or private events, from appearing on and optimizing Salesforce Maps schedules.

## Give Reps Permission to Edit Object Locations

Increase reps' sales schedule efficiency when you give them access to add locations to records. Calendar events for records without location information aren't plotted on the map. Ensure that reps can add location information to records so they can visualize those calendar events in Salesforce Maps. Apply the principle of least privilege by restricting access to objects with permission sets.

1. Create or clone a permission set.
2. From the permission set, click **Object Settings** and select the object whose location you want to grant access to.



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### USER PERMISSIONS

To customize settings:

- [Customize Application](#)

- Click **Edit**.
- Under Field Permissions, for Latitude and Longitude, select **Read Access** and **Edit Access**.

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input type="checkbox"/>

Field Name	Read Access	Edit Access
Last Modified By	<input type="checkbox"/>	<input type="checkbox"/>
Last Updated By	<input type="checkbox"/>	<input type="checkbox"/>
Latitude	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Longitude	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MapIt Proximity Measurement Unit	<input type="checkbox"/>	<input type="checkbox"/>

- Save your work.
- Click **Manage Assignments > Add Assignments**.
- Select which users you want to have location edit access and then click **Assign**.

## Set Up Schedules to Include Custom Activities

Let your reps add custom activities with defined start and end times or durations to their schedules in Salesforce Maps. You determine how to relate those events to Salesforce records.

- From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
- Click **Configure** next to the Salesforce Maps package.
- Select **Routes & Schedule**, then click **+ Custom Event**.
- Select the Salesforce object that represents custom activities. Specifically, select one that includes defined start and end times or durations. Then click **Confirm**.

- Configure the schedule settings for new custom activity records that Salesforce Maps generates.

Setting	What It Is
Name	The name of the custom activity object as you want it to appear in Salesforce Maps Schedule.

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To customize settings:

- Customize Application

Setting	What It Is
Scheduling Resource	The owner or assignee for custom activity records. Select a field that includes the ID of the owner or assignee, such as OwnerID.
Event Name Field	The name of each custom activity record.
Time Fields	The time configuration relevant to your custom activity object. If the object has: <ul style="list-style-type: none"> <li>Start date/time and end date/time fields, select <b>Use Start DateTime and End DateTime</b>.</li> <li>Start date/time and duration fields, select <b>Use Start DateTime and Duration</b>.</li> </ul>
Start Date Time Field	The Salesforce field that represents the start date/time.
End Date Time Field	The Salesforce field that represents either the end date/time or duration.

6. Select options for related object configurations. These options define which Salesforce objects are available for users to schedule custom activity records. For example, you enable Account. Your reps can then schedule custom activity records related to accounts in the Salesforce Maps schedule.

Keep in mind that the schedule requires a lookup relationship from the custom activity object to the related object. Otherwise, you can't enable the related object.

7. Save your changes.

### Assign Specific Event Types to Meetings

Specify the default Salesforce event types that you want to assign from the meetings your reps schedule in Salesforce Maps. Assigning event types gives, for example, managers insight to the types of events that their reps schedule, such as meetings, calls, and email messages.

1. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Routes & Schedule**, then click **Event**.

4. Select a default event type for any related object configuration. For example, to specify *Meeting* as the event type when scheduling visits to accounts, select **Meeting** for Account (Billing).

#### EDITIONS

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#### USER PERMISSIONS

To customize settings:

- Customize Application

ENABLED	OBJECT	GET LOCATION FROM	EVENT TYPE
<input type="checkbox"/>	This Object	No Applicable Base Objects	Select an Option
<input checked="" type="checkbox"/>	Opportunity	Opportunity	Select an Option
<input checked="" type="checkbox"/>	Lead	Lead	Select an Option
<input checked="" type="checkbox"/>	Contact	Contact	Select an Option
<input checked="" type="checkbox"/>	Case	Case	Select an Option
<input checked="" type="checkbox"/>	Account	Account (Billing)	Meeting

+ Add a Related Object

5. Save your changes.

## Exclude Specific Events and Activities from Schedules

Partner with your Salesforce admin to exclude specific events and custom activities, such as all-day or private events, from appearing on and optimizing Salesforce Maps schedules.

1. Ask your Salesforce admin to create an editable custom activity checkbox on the Activity object for events. Set the label of the checkbox to a value that resonates with your reps, such as *Private*.
2. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
3. Click **Configure** next to the Salesforce Maps package.
4. Select **Routes & Schedule**, then click **Event** or a custom event object that you've already set up.

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### USER PERMISSIONS

To customize settings:

- Customize Application

Event Object Configuration

Enabled  Save

\* Name: Event

Salesforce Object: Event

Event Name Field: Subject

Event Name Field: Subject

End Date Time Field: End Date Time

Exclude Specific Records from Schedule: Select an Option

Related Object Configuration

ENABLED	OBJECT	GET LOCATION FROM
<input type="checkbox"/>	This Object	No Applicable Base Objects
<input checked="" type="checkbox"/>	Opportunity	Opportunity
<input checked="" type="checkbox"/>	Lead	Lead

Exclude Specific Records from Schedule dropdown options:

- None--
- All-Day Event
- Historical Event, Not Following Recurrence
- Is Exception
- Private
- Reminder Set

5. Click **Exclude Specific Records from Schedule**, and select an option, such as **Private**.
6. Save your changes.  
When your reps open events in Salesforce and select the checkbox that your admin added, those meetings disappear from the schedule in Salesforce Maps.

## Configuring Check In Settings

Let sales and service reps log activities and notes from the field using a convenient button on their mobile devices. Customize the Check In experience by creating custom activity fields, a custom disposition, and specific settings for each base object in Salesforce Maps.

### [Create Fields for Checking In to Visits](#)

Capture data that's important to your company every time reps check in to a visit or event. Salesforce Maps Check In lets reps log their location, time, visit duration, and other details from the field quickly and saves that information before they proceed to the next visit. Managers can view those visit details in Salesforce at any time.

### [Match Check In Fields with Activity Settings](#)

Get location data from reps in the field or at on-site events, and add that data to Salesforce. Set up the check-in and check-out process to create events and tasks, post to Chatter, send arrival alerts, and verify addresses, for example.

### [Prompt Users for Details about Meetings when Checking In](#)

Determine which information field reps provide when they check in to meetings when you create a field set and a custom disposition in Salesforce Maps.

### [Select Check In Settings for Base Objects](#)

After creating Check In and Check Out fields and configuring a custom disposition, configure Check In settings for each base object. Base object-level Check In settings let you further customize what activities and posts that Salesforce Maps generates each time a user checks in at a specific record.

### [Check Reps Out from Visits Automatically](#)

Save your reps time by letting them check in and out of a visit with one click in Salesforce Maps. Checking in to a location logs an activity and marks it complete. If managers require reps to enter notes about a meeting before automatic checkout is complete, include a custom disposition.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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## Create Fields for Checking In to Visits

Capture data that's important to your company every time reps check in to a visit or event. Salesforce Maps Check In lets reps log their location, time, visit duration, and other details from the field quickly and saves that information before they proceed to the next visit. Managers can view those visit details in Salesforce at any time.

It's best to create the fields listed in [Check In Activity Fields and Criteria](#).

1. From the management settings for activities, go to **Fields & Relationships** > **New**.
2. Select the type of field you want available for check in or out. For example, to include the visit location when a rep checks in, which is recorded as latitude and longitude, select **Number**, and then click **Next**.

SETUP > OBJECT MANAGER  
Activity

Details  
Fields & Relationships  
Buttons and Links  
Object Limits  
Search Layouts  
List View Button Layout

Activity  
New Custom Field Help for this Page

Step 1. Choose the field type Step 1

Specify the type of information that the custom field will contain.

Data Type

- Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number Allows users to enter any number. Leading zeros are removed.
- Percent Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist Allows users to select a value from a list you define.

Next Cancel

3. Enter a field label and set the field attributes. Click **Next**.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label  ⓘ

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length  Decimal Places

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name  ⓘ

Description

4. Specify the field access settings for each profile, and then click **Next**.
5. Select the page layouts you want to add the field to.

### EDITIONS

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### USER PERMISSIONS

To customize settings:

- Customize Application

**Step 4. Add to page layouts** Step 4 of 4

Previous Save & New Save Cancel

Field Label	Created Latitude
Data Type	Number
Field Name	Created_Latitude
Description	Geolocation of check in

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

<input checked="" type="checkbox"/> Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Event Layout
<input checked="" type="checkbox"/>	Task Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

6. Save your work, and then repeat these steps for each field you want to create.

SEE ALSO:

[Check In Activity Fields and Criteria](#)

[Salesforce Help: Create Custom Fields](#)

## Match Check In Fields with Activity Settings

Get location data from reps in the field or at on-site events, and add that data to Salesforce. Set up the check-in and check-out process to create events and tasks, post to Chatter, send arrival alerts, and verify addresses, for example.

1. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Settings > Activity Settings**.
4. To map the activity fields to their corresponding activity settings, click **Suggest**, or select individual fields.

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### USER PERMISSIONS

To customize settings:

- Customize Application



5. Save your changes.

SEE ALSO:

[Check In Activity Fields and Criteria](#)

### Prompt Users for Details about Meetings when Checking In

Determine which information field reps provide when they check in to meetings when you create a field set and a custom disposition in Salesforce Maps.

1. Create a custom disposition field set. From the management settings for the **Task** object, click **Field Sets > New**.

2. Enter a name for the **Field Set Label**.
3. Enter a description for **Where is this used?**

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#### USER PERMISSIONS

- To customize settings:
- Customize Application

Task Field Set  
New Field Set

Field Set Edit Save Cancel

Enter Field Set information = Required Information

Field Set Label Salesforce Maps Custo  
Field Set Name Salesforce\_Maps\_Custc  
Namespace Prefix Salesforce Maps  
Where is this used?

Save Cancel

4. Save your changes.
5. In the **Salesforce Maps Custom Disposition** field set, add the fields you want listed for users to complete when they use Custom Disposition.  
For example, you want users to add comments about their meeting.

Salesforce Maps Custom Disposition Help for this Page

Save Cancel Undo Redo Field Set Properties

Task Quick Find Task Name

Account	Call Duration	Check Out Date	Created By	Du
Activity ID	Call Object Ident...	Closed	Created Date	Hi
Archived	Call Result	Comments	Create Recurring ...	La
Assigned To	Call Type	Completed Date	Deleted	La

Drag any of the fields above into one of the lists below.

Available for the Field Set

Drag and drop the fields you want administrators to have available to add to the Field Set.

In the Field Set

Drag and drop the fields you want listed in the Field Set.

6. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
7. Click **Configure** next to the Salesforce Maps package.
8. Select **Settings > Activity Settings**.
9. In the **Custom Disposition** section, select the Field Set you created.

Custom Disposition

Field Set  
Salesforce Maps Custom Disposition

Save Suggest

10. Save your changes.

SEE ALSO:

[Salesforce Help: Creating and Editing Field Sets](#)

### Select Check In Settings for Base Objects

After creating Check In and Check Out fields and configuring a custom disposition, configure Check In settings for each base object. Base object-level Check In settings let you further customize what activities and posts that Salesforce Maps generates each time a user checks in at a specific record.

1. From Setup, enter *Installed Packages* in the Quick Find box, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Base Object > Edit Existing** or **Base Object > Create New**.
4. Select the base object that you want to edit.
5. Select the Check In settings that you want Salesforce Maps to generate when a user checks in at that object.

**Check In Settings**

Post To: Chatter & Task  Feet

Chatter Body:  Verification Required

Check In @ {tooltip1} ({distance-feet} feet from destination)

More Info:  
 Latitude : {lat},  
 Longitude : {long},  
 Accuracy in Miles : {accuracy-miles}

{tooltip1} = Value of Tooltip  
 {distance-meters} = Distance in Meters (Same as {distance})  
 {lat} = Latitude on Check In  
 {long} = Longitude on Check In  
 {distance-kilometers} = Distance in Kilometers  
 {distance-miles} = Distance in Miles  
 {distance-feet} = Distance in Feet  
 {distance} = Distance in Meters  
 {distance-yards} = Distance in Yards  
 {accuracy-meters} = Accuracy in Meters  
 {accuracy-kilometers} = Accuracy in Kilometers  
 {accuracy-miles} = Accuracy in Miles  
 {accuracy-feet} = Accuracy in Feet  
 {accuracy-yards} = Accuracy in Yards

\* All distances are rounded to 2 decimal places

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#### USER PERMISSIONS

- To customize settings:
- Customize Application

<b>Post To</b>	Creates a Chatter post, a task, an event, or a combination of them.
<b>Verification Distance</b>	Requires mobile users to be within a given distance of a record's geolocation to check in.
<b>Chatter Body</b>	Determines the content of Chatter posts. Include any fields that you created in Activity Settings using corresponding macros.

6. Save your changes.

SEE ALSO:

[Base Objects Settings](#)

## Check Reps Out from Visits Automatically

Save your reps time by letting them check in and out of a visit with one click in Salesforce Maps. Checking in to a location logs an activity and marks it complete. If managers require reps to enter notes about a meeting before automatic checkout is complete, include a custom disposition.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Permission Groups**.
4. Create or select a permission group.
5. Click **Edit**, and then select **Auto Check Out**.

Setting	Value	Default Permission Group
Maximum Records to Plot	50000	
Maximum number of records to plot for External Objects	2000	
Folder Administrator	<input checked="" type="checkbox"/>	
Show User Folders	<input type="checkbox"/>	
Show Personal Folders	<input checked="" type="checkbox"/>	
Enable ArcGIS Layers	<input checked="" type="checkbox"/>	
Manage Data Layers	<input checked="" type="checkbox"/>	
Manage Data Sources	<input type="checkbox"/>	
Manage Territory Layers	<input type="checkbox"/>	
Plot on Load Layers	Marker Layer Search above for available layer Q	
Auto Check Out	<input checked="" type="checkbox"/>	

6. Save your changes.

### SEE ALSO:

[Prompt Users for Details about Meetings when Checking In](#)

## Letting Reps Create Leads and Accounts from Salesforce Maps

Save your sales and service reps time when you let them create leads and accounts using the property and business data available in Salesforce Maps. Your reps can also create records from points of interest, their current location, and any other areas on the map using Click2Create.

1. [Specify Which Fields Appear when Reps Create Records from Salesforce Maps](#)  
Capture specific information when reps create leads and accounts using Click2Create. You create field sets in Salesforce for each object that's relevant to your sales and service teams.
2. [Set Up Field Mappings for the Records That Reps Create from Salesforce Maps](#)  
Direct the information that your reps enter into Click2Create fields to the Salesforce lead and account record fields of your choice.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- [Customize Application](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

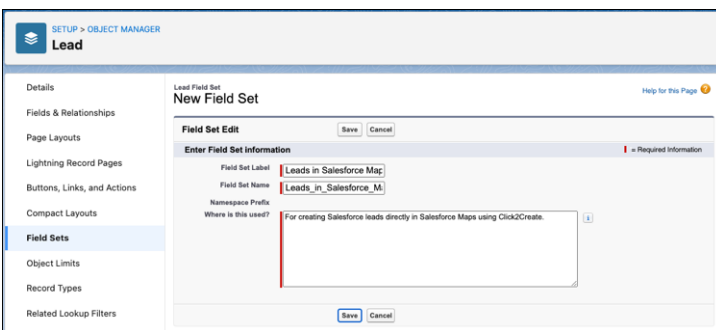
### 3. [Let Reps Create Records from Salesforce Maps](#)

Add the Click2Create button to each button set and assign the button sets to permission groups for your sales and service teams.

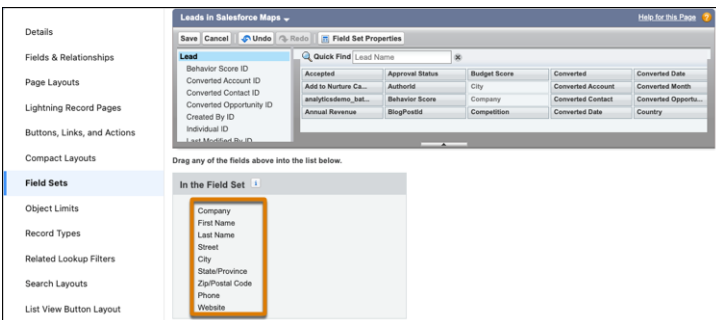
## Specify Which Fields Appear when Reps Create Records from Salesforce Maps

Capture specific information when reps create leads and accounts using Click2Create. You create field sets in Salesforce for each object that's relevant to your sales and service teams.

1. From Setup, in the Quick Find box, enter *Object Manager*, and then select **Object Manager**.
2. Select the object for the field set that you're creating, such as Lead or Account. Then click **Field Sets > New**.
3. Enter a field set label and name, and then describe where you're applying the field set.



4. Save your changes.
5. Add the fields that you want to appear when reps create records in Salesforce Maps.



6. Save your changes.

SEE ALSO:

[Salesforce Help: Creating and Editing Field Sets](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

## Set Up Field Mappings for the Records That Reps Create from Salesforce Maps

Direct the information that your reps enter into Click2Create fields to the Salesforce lead and account record fields of your choice.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**. Then, select **Click2Create**.
3. Select the object that you want your reps to create records for, such as Lead or Account. If your reps generate leads using the property and business data available in Salesforce Maps, the object that you select depends on the data that your reps generate leads from. Specifically, for:
  - Property data, select **Lead**.
  - Business data, select **Account**. Business data doesn't include a Last Name field, which lead records require.
4. Select field mappings between Salesforce and Salesforce Maps. Then select field set mappings, which determine the fields that appear when your reps create records using Click2Create.

The screenshot shows two configuration windows. The top window, titled 'Field Mappings', has three columns: 'Point of Interest', 'My Position', and 'Map Click'. Each column has a dropdown menu with a checkmark. Below these are rows for 'Street', 'City', 'State (Long)', 'State (Short)', 'Postal Code', and 'Country (Long)', each with a corresponding dropdown menu. The bottom window, titled 'Field Set Mappings', also has three columns: 'Point of Interest', 'My Position', and 'Map Click'. Below these are rows for 'Deal Registration', 'Lead', 'Partner Application', and 'Master (System Default)', each with a dropdown menu.

5. Save your changes.

## Let Reps Create Records from Salesforce Maps

Add the Click2Create button to each button set and assign the button sets to permission groups for your sales and service teams.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**. Then, select **Click2Create**.
3. Select **Settings > Button Set Name**.
4. Select the button set that you want to add the Click2Create button to.
5. From Available Buttons, drag the Click2Create button to the My Position, Points of Interest, and Mass Action sections.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

Salesforce Maps Settings

General **Button Set Name** Custom Actions Activity

Button Set  
Standard

\* Name  
Standard

Layouts

Available Buttons<sup>T</sup>

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

6. Save your changes.
7. To assign the button set to any permission group, select **Permission Groups**, and then select one.
8. Scroll to the Information Window section, and then assign your button set to the permission group.

Salesforce Maps Permission Groups  
Field Sales Consumer Goods

Permission Group Name: Field Sales Consumer Goods  
Permission Group Description: Permissions for reps who specialize in consumer goods.

Details Assignment

Desktop and Mobile

General

Setting	Value	Allow User Override
Default Units	Miles	✓
Default Basemap	ESRI Street	✓
Off-Platform Processing Location	North America	
Maps Object Search Language	Salesforce Object	

Information Window

Setting	Value	Allow User Override
Edit Details Tab Fields	✓	✓
Enable Weather Tab	✓	✓
Actions Tab Buttonset	Standard	✓

9. Save your changes.

SEE ALSO:

[Button Sets Options](#)

[Create and Maintain Button Sets](#)

## Showing Nearby Maps in Salesforce Records and on Sites

Bring context to records and sites when you add a Salesforce Maps component to page and site layouts. Select from standard maps for accounts, contacts, cases, leads, and opportunities. Or create custom maps that show the records or filtered layers of your choice.

### [Considerations for Setting Up Nearby Maps](#)

Consider tradeoffs when you show your reps and partners nearby maps in Salesforce records and on sites. You can include nearby maps when you add a Salesforce Maps component to record and site layouts.

### [Add Nearby Maps to Salesforce Record Pages](#)

Embed relevant, contextual nearby maps directly in records when you add a Salesforce Maps component to page layouts in Lightning Experience.

### [Add Nearby Maps to Sites](#)

Give your customers and partners context for what's local and relevant on nearby maps that appear directly on your sites when you add a Salesforce Maps component to site layouts.

### [Create Custom Nearby Maps](#)

Customize nearby maps to show the records or filtered layers that you want to appear in Salesforce records and on sites when you add a Salesforce Maps component to page and site layouts.

## Considerations for Setting Up Nearby Maps

Consider tradeoffs when you show your reps and partners nearby maps in Salesforce records and on sites. You can include nearby maps when you add a Salesforce Maps component to record and site layouts.

Setting up nearby maps to appear in Salesforce records and on sites requires that you:

- Disable clickjack protection. Keep in mind that when you disable clickjack protection, you make Salesforce less secure for your company.
- Provide geocoded data. To geocode your data, plot several layers on the map or run a geocoding batch.

SEE ALSO:

[Salesforce Help: Disable Clickjack Protection](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



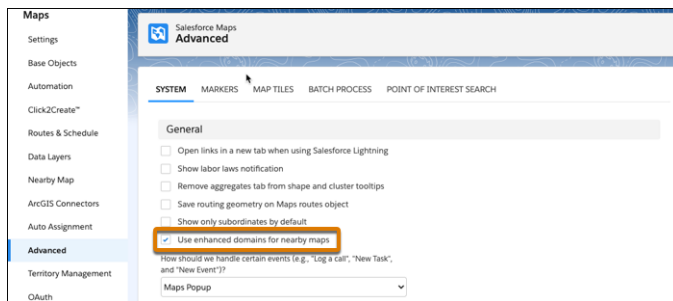
## Add Nearby Maps to Salesforce Record Pages

Embed relevant, contextual nearby maps directly in records when you add a Salesforce Maps component to page layouts in Lightning Experience.

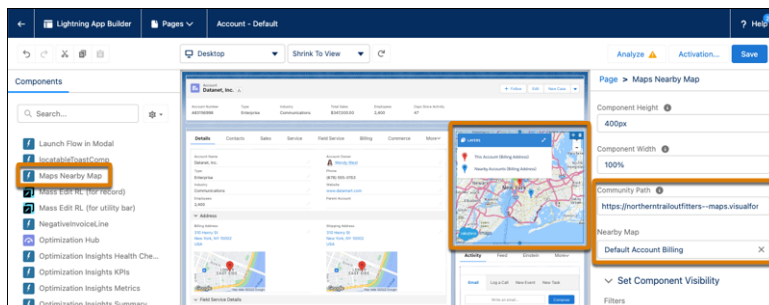
1. If you don't use enhanced domains, skip to the next step.

Otherwise, from Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.

Next to the Salesforce Maps package, click **Configure**. On the Advanced tab, select the option to use enhanced domains. Save your changes.



2. In Salesforce, open a record that you want a nearby map to, such as an account or a contact.
3. Click **Setup > Edit Page**.  
Lightning App Builder appears.
4. Under Components, scroll to Custom-Managed. Drag the **Maps Nearby Map** component to an area of the page layout where you want the map to appear.



5. If you use enhanced domains, skip to the next step.

Otherwise, in Community Path, enter your Salesforce domain followed by `--maps.visualforce.com`.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

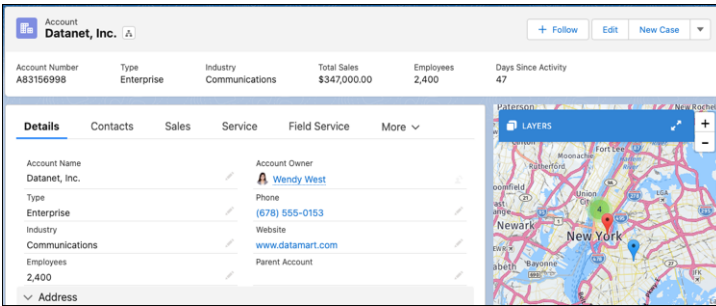
### USER PERMISSIONS

To customize settings:

- Customize Application

For example, your Salesforce domain is `https://northerntrailoutfitters`. Enter the community path:  
`https://northerntrailoutfitters--maps.visualforce.com`

- In Nearby Map, specify what you want to appear on the map.  
For example, to show the account's marker in the center of the map, select **Default Account Billing**.
- Save your changes.



The nearby map appears on the record.

#### SEE ALSO:

[Considerations for Setting Up Nearby Maps](#)

[Salesforce Help: Create and Configure Lightning Experience Record Pages](#)

[Salesforce Help: My Domain](#)

## Add Nearby Maps to Sites

Give your customers and partners context for what's local and relevant on nearby maps that appear directly on your sites when you add a Salesforce Maps component to site layouts.

- If you have enhanced domains turned off in My Domain Settings, skip to Step 4.
- From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
- Next to the Salesforce Maps package, click **Configure**. On the Advanced tab, select the option to use enhanced domains. Then save your changes.

### EDITIONS

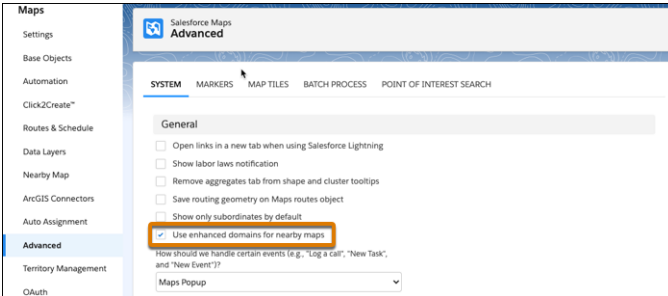
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

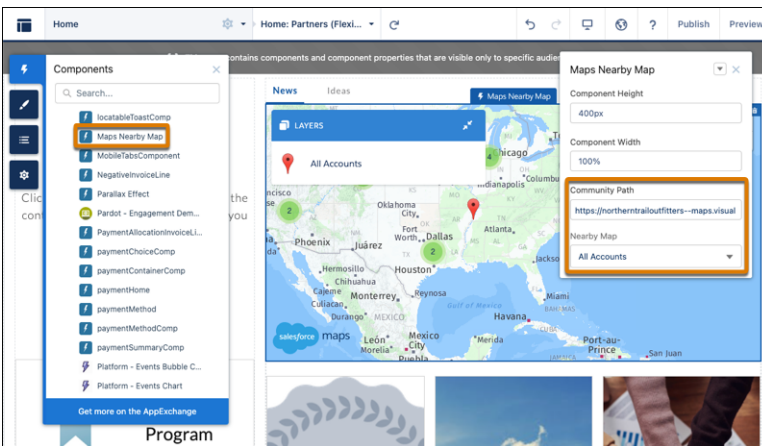
### USER PERMISSIONS

To customize settings:

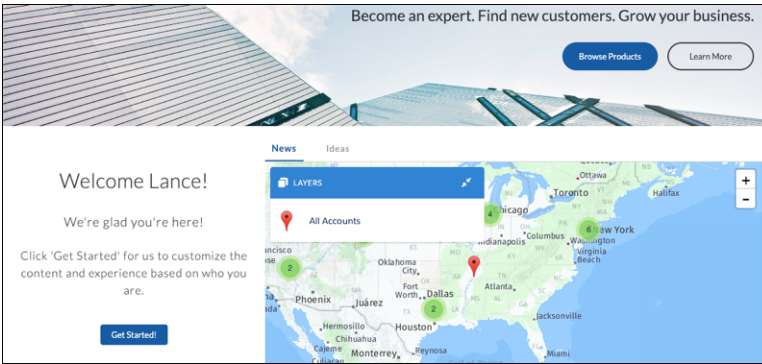
- Customize Application



4. From Setup, in the Quick Find box, enter *All Sites*, and then select **All Sites**.
5. Next to the site that you want to add a nearby map to, click **Builder**.
6. Select **Components**, and then scroll to Custom Components. Drag the **Maps Nearby Map** component to an area of the site layout where you want the nearby map to appear.



7. In Community Path, enter your site's domain.  
 If you have enhanced domains turned on, enter the URL as it appears for your site.  
 If you have enhanced domains turned off, enter the URL followed by `--maps.visualforce.com`. For example, your Salesforce domain is `https://northerntrailoutfitters`. Enter the path:  
`https://northerntrailoutfitters--maps.visualforce.com`
8. In Nearby Map, select a global nearby map that you want to appear on the site. For example, to show all nearby account markers, select **All Accounts**.
9. Publish your site.



The nearby map appears on the site.

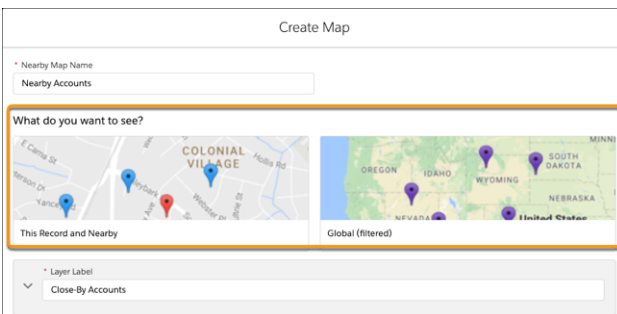
SEE ALSO:

[Salesforce Help: Enhanced Domains](#)

## Create Custom Nearby Maps

Customize nearby maps to show the records or filtered layers that you want to appear in Salesforce records and on sites when you add a Salesforce Maps component to page and site layouts.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Click **Configure** next to the Salesforce Maps package.
3. Select **Nearby Map**, and then click **Create New**.
4. Name your map, and then select what you want the map to show.



For example, to show:

- Other records within close proximity to the record you're working on, select **This Record and Nearby**.
  - A predefined, filtered layer, select **Global (filtered)**.
5. Customize your map, and then save your changes.

SEE ALSO:

[Considerations for Setting Up Nearby Maps](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

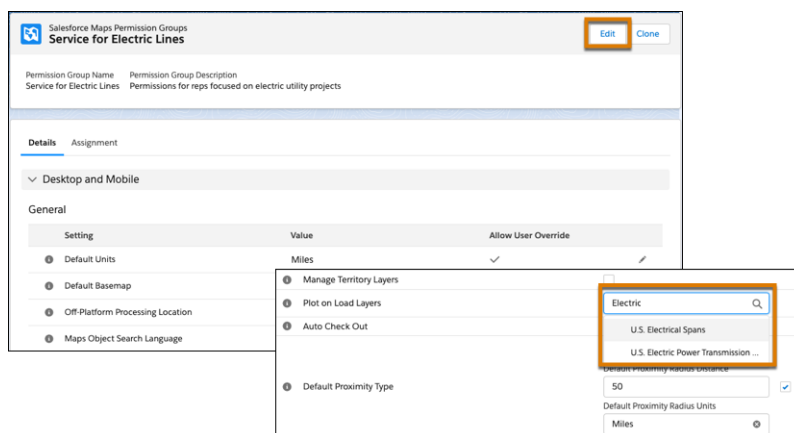
To customize settings:

- Customize Application

## Plot Specific Layers for Reps when They Start Sessions

Show the layers that managers and operations want to appear when reps start their sessions in Salesforce Maps. That way, your reps can jump right into their work without searching for critical details. For example, set marker, data, and ArcGIS layers that give reps more context for sales and service work in their respective areas.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Permission Groups**, and then edit the one that you want to specify which layers to load on the map.
4. Search for and select the layers you want to appear for your reps.



5. Save your changes.

## Setup Reference

Learn about settings and options so that Salesforce Maps works for your reps and managers the way you intend.

### [Data Coverage for Salesforce Maps Products and Sales Planning](#)

Access coverage for the data that's available in Salesforce Maps, Salesforce Maps Advanced, Sales Planning, and Territory Planning. For each country that matters to you, identify available data such as latitude and longitude coordinates, routes, and territory boundaries.

### [Data Sources for the Salesforce Maps Product Portfolio](#)

Learn about the data available to you in Salesforce Maps and access details about the providers of that data.

### [General Settings Options](#)

Understand the impact of the options that you select for Salesforce Maps users.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To customize settings:

- [Customize Application](#)

[Base Objects Settings](#)

Fine-tune base objects in Salesforce Maps to meet your business needs.

[Button Sets Options](#)

Help field reps make their sales and service times as efficient as possible when you define button sets for users and profiles in Salesforce Maps.

[Permission Group Settings](#)

Make informed decisions when you set up and maintain permission groups in Salesforce Maps.

[Check In Activity Fields and Criteria](#)

Define activity settings for the custom activity fields that you create to work with Salesforce Maps Check In.

[Reference for Shape, Marker, and Data Layers](#)

Customize shape, marker, and data layers using supported field and postal code formats in Salesforce Maps.

[Requirements for Salesforce Maps Live Tracking](#)

Ensure optimal tracking performance for your reps in the field when they meet minimum platform requirements for Live Tracking on the Salesforce Maps mobile app.

[Single Sign-On Options for Mobile Devices](#)

Streamline the log-in process so that your reps log in to Salesforce and Salesforce Maps at the same time.

## Data Coverage for Salesforce Maps Products and Sales Planning

Access coverage for the data that's available in Salesforce Maps, Salesforce Maps Advanced, Sales Planning, and Territory Planning. For each country that matters to you, identify available data such as latitude and longitude coordinates, routes, and territory boundaries.

### Access to Data Coverage

Download the [Data Coverage by Country for Salesforce Maps Products and Sales Planning](#) spreadsheet.

### Boundary Discrepancies

These products provide boundary data sourced from numerous data providers. Keep in mind that boundaries from the data providers and your sources can vary. If the boundaries within Salesforce Maps products and Sales Planning seem inaccurate to you, contact Salesforce Customer Support.

- Your support engineer can investigate potential data issues. If an issue originates in Salesforce Maps products or in Sales Planning, the product team can schedule its resolution.
- And Salesforce can work with the data providers to correct inaccuracies. But Salesforce can't control whether or when providers resolve any of their inaccuracies.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Data Sources for the Salesforce Maps Product Portfolio

Learn about the data available to you in Salesforce Maps and access details about the providers of that data.

Salesforce Maps and its portfolio of products are licensed to use data from these sources.

Source	Details
ATTOM Data Solutions	This product is licensed to use data from <a href="#">ATTOM Data Solutions</a> .
Australian Bureau of Statistics	<ul style="list-style-type: none"> <li><a href="#">Australian Census</a></li> <li><a href="#">Creative Commons</a></li> </ul> <p>Modifications and derivative analytics are not endorsed by the Curator.</p>
Companies House	<p><a href="#">Companies House</a></p> <p>This does not constitute an endorsement by Companies House of this product.</p>
Database USA	This product is licensed to use data from <a href="#">DatabaseUSA</a> .
EIA	<p><a href="#">U.S. Energy Information Administration</a></p> <p>This does not constitute an endorsement by EIA of this product.</p>
Eurostat	<ul style="list-style-type: none"> <li><a href="#">Eurostat</a></li> <li><a href="#">European Commission</a></li> </ul> <p>The European Union authorizes reuse, provided the source is acknowledged. This does not constitute an endorsement by EU or Eurostat of this product.</p>
HERE	This product is licensed to use data from <a href="#">HERE Technologies</a> .
INEGI	<ul style="list-style-type: none"> <li><a href="#">National Institute of Statistics and Geography</a></li> <li>This information is from INEGI with adherence to the provisions of the <a href="#">INEGI's Terms of Free Use of Information</a>.</li> </ul>
Pitney Bowes	This product is licensed to use data from <a href="#">Pitney Bowes</a> .
Precisely	This product is licensed to use data from <a href="#">Precisely</a> .
StatCan	<p><a href="#">Statistics Canada</a></p> <p>This does not constitute an endorsement by Statistics Canada of this product.</p>
Stats NZ	<p><a href="#">Statistics New Zealand</a></p> <p>Licensed under the Creative Commons Attribution 3.0 New Zealand license. Modifications and derivative analytics are not endorsed by the Curator.</p>

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Source	Details
UK Office of National Statistics & National Records of Scotland	<p>This product uses data from:</p> <ul style="list-style-type: none"> <li>• <a href="#">Nomis</a></li> <li>• <a href="#">National Records of Scotland</a></li> </ul> <p>Under the terms of the Open Government License (OGL) and UK Government Licensing Framework, anyone wishing to use or re-use ONS material, whether commercially or privately, may do so freely without a specific application for a license, subject to the conditions of the OGL and the Framework.</p>
US Census Bureau	This product uses the Census Bureau Data API but is not endorsed or certified by the <a href="#">Census Bureau</a> .
Google	This product is licensed to use data from <a href="#">Google</a> .
Esri	This product is licensed to use data from <a href="#">Esri</a> .
AerisWeather	This product uses weather APIs powered by <a href="#">AerisWeather</a> .

## General Settings Options

Understand the impact of the options that you select for Salesforce Maps users.

Option	What It Does
Folder Permissions	Governs who can access specific shared folders within the Corporate folder
Show user profile names on popups	Distinguishes among multiple users who share first and last names when you include profile names next to usernames
Routing Role Security	Lets users assign routes at or below their level in the user role hierarchy
Debug Logs	Option that's reserved for Salesforce Customer Support

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions



## Base Objects Settings

Fine-tune base objects in Salesforce Maps to meet your business needs.

Option	What It Does
Schedule Priority Field	<p>Prioritizes event scheduling based on values of specific fields. For example, you want reps to schedule events based on annual revenue. Here's how.</p> <ol style="list-style-type: none"> <li>1. From Salesforce Maps Settings, select <b>Base Objects &gt; Edit</b>.</li> <li>2. Select the <b>Account (Billing)</b> base object.</li> <li>3. In the Schedule Priority Field section, select <b>Annual Revenue</b> for your priority field. Then, select your popup visual style.</li> <li>4. Save your changes.</li> </ol>
Check In Settings	<p>Lets you specify the content that posts to Chatter when reps check in, and the maximum distance to check in from the check-in location. Here's how.</p> <ol style="list-style-type: none"> <li>1. From Salesforce Maps Settings, select <b>Base Objects &gt; Edit</b>.</li> <li>2. Select a base object.</li> <li>3. In the Check In Settings section, make selections for:           <ul style="list-style-type: none"> <li><b>Post To</b> Determines whether Salesforce Maps creates a Chatter post, a task, and an event, or a combination of them.</li> <li><b>Verification Distance</b> Requires mobile users to be within a given distance of a record's geolocation to check in.</li> <li><b>Chatter Body</b> Determines the content in Chatter posts generated when checking in. Include any fields that you created in Activity Settings using appropriate macros.</li> </ul> </li> <li>4. Save your changes.</li> </ol>
Map It Button Settings	<p>Lets you set up the display and popups for custom Map It buttons.</p> <ol style="list-style-type: none"> <li>1. From Salesforce Maps Settings, select <b>Base Objects &gt; Edit</b>.</li> <li>2. Select a base object that you want to add a Map It button to.</li> <li>3. In the Map It Settings section, create the popups that you want to appear when reps click <b>Map It</b>.</li> <li>4. Make selections for:           <ul style="list-style-type: none"> <li><b>Map It Zoom Level</b> Shows the marker relative to the street, city, state, country, and continent.</li> <li><b>Map It Proximity On</b> Plots a proximity circle around markers created from when reps click <b>Map It</b>.</li> </ul> </li> </ol>

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### USER PERMISSIONS

To customize settings:

- Customize Application

Option	What It Does
	<p><b>Radius of Circle</b> Sets the radius of the proximity circle.</p> <p><b>Measurement Unit</b> Lets you select the unit of measurement to the radius.</p> <p>5. Save your changes.</p>

## Button Sets Options

Help field reps make their sales and service times as efficient as possible when you define button sets for users and profiles in Salesforce Maps.

Layout	What It Does
Popup	Shows the action buttons available on the Actions tab when reps select specific markers
Mass Action	Shows action buttons when users select multiple markers for a mass action
My Position	With location services enabled, shows action buttons when users select their location
POI	Shows action buttons when users click POI search results

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## Permission Group Settings

Make informed decisions when you set up and maintain permission groups in Salesforce Maps.

Setting	What It Does
Folder Admin	Lets users and profiles manage folders within the shared Corporate folder.
Show User Folders	Lets users and profiles see personal folders of other users, based on each user's role in the Salesforce role hierarchy.
Allow Marker Exports	Lets users and profiles export marker layer data from the Salesforce Maps List View into a .csv file.
Show Weather Tab	Lets users and profiles view weather conditions and forecasts for a marker's location.
Show Personal Folder	Lets users access their personal folders.
Enable ArcGIS Layers	Lets users manage ArcGIS layers.
Manage Data Layers	Lets users create and view data layers to visualize data from outside Salesforce, based on its location.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Setting	What It Does
Auto Check Out	Saves field reps a step from having to check out after they check in When reps check in, Salesforce Maps creates an activity logged against a record, and then marks it complete.
Enable Live Mobile Tracking	Gives users and profiles live location tracking through mobile devices.
Maximum Number of Records to Plot for External Objects	Limits the number of markers that users and profiles can see to 2,000 or fewer in an external object marker layer. Users can still plot multiple marker layers simultaneously.
Allow Marker Exports	Lets users export markers.
Button Set Name	Lets you assign a button set you created to a user or profile.
Manage Territory Layers	Lets users and profiles create, modify, and aggregate territory layers.

## Check In Activity Fields and Criteria

Define activity settings for the custom activity fields that you create to work with Salesforce Maps Check In.

Field	Criteria
Created Latitude	<ul style="list-style-type: none"> <li>Field Type: Number</li> <li>Field Label: Created Latitude</li> <li>Length: 3</li> <li>Decimal Places: 15</li> </ul>
Created Longitude	<ul style="list-style-type: none"> <li>Field Type: Number</li> <li>Field Label: Created Longitude</li> <li>Length: 3</li> <li>Decimal Places: 15</li> </ul>
Distance From Record (mi)	<ul style="list-style-type: none"> <li>Field Type: Number</li> <li>Field Label: Distance From Record (mi)</li> <li>Length: 14</li> <li>Decimal Places: 4</li> </ul>
Created Location Accuracy (m)	<ul style="list-style-type: none"> <li>Field Type: Number</li> <li>Field Label: Created Location Accuracy (m)</li> <li>Length: 14</li> <li>Decimal Places: 4</li> </ul>
Created Location Verified	<ul style="list-style-type: none"> <li>Field Type: Checkbox</li> <li>Field Label: Created Location Verified</li> </ul>

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Field	Criteria
	<ul style="list-style-type: none"> <li>• Default Value: Unchecked</li> </ul>
Check Out Latitude	<ul style="list-style-type: none"> <li>• Field Type: Number</li> <li>• Field Label: Check Out Latitude</li> <li>• Length: 3</li> <li>• Decimal Places: 15</li> </ul>
Check Out Longitude	<ul style="list-style-type: none"> <li>• Field Type: Number</li> <li>• Field Label: Check Out Longitude</li> <li>• Length: 3</li> <li>• Decimal Places: 15</li> </ul>
Check Out Date	<ul style="list-style-type: none"> <li>• Field Type: Date/Time</li> <li>• Field Label: Check Out Date</li> </ul>
Check Out Accuracy (m)	<ul style="list-style-type: none"> <li>• Field Type: Number</li> <li>• Field Label: Check Out Accuracy (m)</li> <li>• Length: 14</li> <li>• Decimal Places: 4</li> </ul>
Check Out Distance From Record (mi)	<ul style="list-style-type: none"> <li>• Field Type: Number</li> <li>• Field Label: Check Out Distance From Record (mi)</li> <li>• Length: 14</li> <li>• Decimal Places: 4</li> </ul>

## Reference for Shape, Marker, and Data Layers

Customize shape, marker, and data layers using supported field and postal code formats in Salesforce Maps.

### [Marker Layer Options](#)

Apply formats, filters, and visual settings that increase your reps effectiveness when they plot marker layers in Salesforce Maps.

### [Supported Postal Code Formats for Shape Layers](#)

Review supported formats by country for the postal codes that you add to Salesforce Maps shape layers.

### [Fields for Property Data \(USA\)](#)

Generate more leads when you identify opportunities using public US property data available in Salesforce Maps. Filter and plot data layers that help you discover customers who can benefit from your products and services.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

### Fields for Business Data (USA)

Drum up more business when you make the most of public US business data available in Salesforce Maps. Filter and plot data layers that help you identify sales and service opportunities relevant to your business efforts.

## Marker Layer Options

Apply formats, filters, and visual settings that increase your reps effectiveness when they plot marker layers in Salesforce Maps.

### Filters

To limit the results in a marker layer to a particular scope, apply filters. Filtering marker layers is similar to filtering Salesforce Reports.

Filter Type	What It Does
Field Filters	Specifies the records that you want to see by accessing fields on the record detail page and lookups to parent objects. Not available for long text fields.
Activity Filters	Creates a report by showing objects with or without tasks and events during a specific time period.
Cross Filters Set	Includes or excludes records from related objects and their fields. Add up to two cross-object filters to their marker layer and extra subfilters under those objects.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### Markers

Review the options to assign colors and shapes for markers.

Option	What It Does
Uniform	Makes all markers the same color and shape. Select a new shape and color for all markers from the preset marker type or create a custom marker type. Marker Type determines the shape and color of markers. Standard marker shapes and colors meet Salesforce accessibility standards.
Varied Based On 1 Field	Dynamically assigns colors and shapes to markers based on the value of the selected field type.
Varied Based On 2 Fields	Assigns marker colors and shapes based on two field values. One field determines marker color and the other determines marker shape.
Labeled Pins	Shows the label field of your choice or the field from <b>Marker Pop-ups &gt; Title Field</b> for this marker layer instead of a marker shape. Assigns static text and background colors for labels, or dynamically assigns colors to labels based on a field from the base object.
Ordered by a Field	Selects a field to display a numeric order for all markers based on their value for that field.

### Heat Map

Show the intensity of data at geographical points on your heat map.

Option	Description
Unit Radius in Pixels	The radius of influence for each data point, in pixels. The recommended radius value is 15.
Opacity	The opacity of the heat map from 0 through 100%. The recommended opacity value is 80%.
Maximum Intensity	Lets you specify a fixed maximum, which helps when your dataset contains a few outliers with an unusually high intensity. By default, Salesforce Maps dynamically scales heat map colors according to the greatest concentration of points at any particular pixel on the map  The recommended max intensity value is 5, unless you assign a weighted value. If you assign a weighted quantitative value, change the max intensity to 90% of the maximum value of the field you chose. For example, if your maximum annual revenue is 1,000,000, set the max intensity to 900,000.
Fade heat map with zoom	Specifies whether heat maps dissipate on zoom. When deselected, the radius of influence increases with the zoom level to ensure that Salesforce Maps preserve the color intensity at a given geographic location.
Weighted Value	The field that you want to show on the heat map. By default, the heat map depicts the quantity of records in a location. Colors for high-density areas are red and low-density areas are black. To change a color, click it.
Color Gradient	The color gradient of the heat map, specified as an array of CSS color strings. Salesforce Maps supports all CSS3 colors, including RGBA, except for extended named colors and HSL(A) values.

### Proximity

Display proximity radius circles around every marker in a marker layer.

Option	What It Does
Show proximity around markers	Shows a proximity circle around each marker on the map.
Hide proximity center markers	Shows proximity circles but hides markers of the currently plotted marker layer.
Hide markers outside of proximities	Shows markers that fall within the proximity of the currently plotted marker layer.
Radius Distance	Sets the default proximity circle radius.
Distance Units	Sets the unit of measurement for the proximity circle radius distance.

### Advanced Options

Option	What It Does
Map Updates	Sets automatic page refreshes if the dataset updates frequently or is monitored by an end user.
Tooltip Default Tab	Sets the default tooltip tab for a marker.
Marker Limits	Limits the number of markers that appear on the map. Limits which markers appear on the map by proximity boundary.

## Marker Popups

Customize what information popups show. Select fields to display on the popups Details tab, or if the In-Line editing user permission is enabled, update the fields from the map. Add objects and fields that you want to appear on the Related tab. The Related tab shows as many as 10 related records for each marker that appears on the map.

## Supported Postal Code Formats for Shape Layers

Review supported formats by country for the postal codes that you add to Salesforce Maps shape layers.

Country	Example of Postal Code in Its Supported Format
Albania	6402
Argentina	A4400
Australia	5950
Austria	6837
Belarus	2234
Belgium	4701
Bermuda	PG 05
Bosnia and Herzegovina	75211
Brazil	01236
Bulgaria	2873
Canada	T5W
Cayman Islands	KY1-1700
Chile	938
Colombia	153407
Costa Rica	60116
Croatia	32257
Cyprus	2120
Czechia	317 00
Denmark	8789
Dominican Republic	43000
Egypt	11
Estonia	74227
Finland	88615

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

<b>Country</b>	<b>Example of Postal Code in Its Supported Format</b>
France	33230
French Guiana	97370
Germany	97334
Greece	460 33
Guadeloupe	97136
Hungary	1007
Iceland	815
India	473775
Indonesia	16875
Ireland	Y21
Israel	47249
Italy	09067
Japan	820
Jordan	21682
Kuwait	00
Latvia	5052
Lithuania	99287
Luxembourg	4057
Malaysia	31050
Malta	QLA
Martinique	97290
Mayotte	97670
Mexico	04960
Moldova	7414
Montenegro	81104
Morocco	33
Netherlands	9673
New Zealand	2019
North Macedonia	1117
Norway	6715



<b>Country</b>	<b>Example of Postal Code in Its Supported Format</b>
Philippines	5614
Poland	83-041
Portugal	4650
Romania	01
Russia	950
Saudi Arabia	25396
Serbia	11223
Singapore	21
Slovakia	987 01
Slovenia	8256
South Africa	7141
Spain	03559
Sweden	982 60
Switzerland	3232
Taiwan	904
Turkey	52200
Ukraine	210
United Kingdom	RM1
United Kingdom	GU2 4
United States	59022
United States	772
Uruguay	75300
Venezuela	3149
Wallis and Futuna	98600

## Fields for Property Data (USA)

Generate more leads when you identify opportunities using public US property data available in Salesforce Maps. Filter and plot data layers that help you discover customers who can benefit from your products and services.

Salesforce Maps works with data providers that supply property data. Periodically, these providers update their data, which means that your data layers reflect those updates. If the providers change their data formats, Salesforce Maps includes new data layers for you to plot on the map. Salesforce Maps can update, replace, or remove property data at any time.

Field	Description
Area Building Definition Code	Details the area described by the AreaBuilding value.
Area of Total Living Space (Square Feet)	Living square feet of all structures on the property.
Assessor Last Sale Amount	Amount paid by primary owner as provided by the assessor.
Assessor Last Sale Date	Date when the primary owner acquired the property as provided by the assessor in the format YYYY-MM-DD.
Assessor Prior Sale Amount	Amount paid by previous owner as provided by the assessor.
Available Equity	The difference between the current market value represented by the AVM value and the sum of the current outstanding loan amounts.
Census Block Group	US Census assigned Block Group for subject property.
Census Tract	US Census assigned Tract Code for subject property.
Combined Statistical Area	Combined Statistical Area (CSA) Names. Area consisting of at least two adjacent metropolitan and micropolitan statistical areas that have substantial employment interchange as defined by the Office of Management and Budget (OMB).
Construction Type	Construction Type.
Contact: Owner Mailing Address Carrier Route	Anytown CA 90001-0001 CR0523 - Mailing carrier route.
Contact: Owner Mailing Address City	Anytown CA 90001-0001 CR0523 - Mailing city.
Contact: Owner Mailing Address Full	123 1/2 N Main St. - Full mailing address.
Contact: Owner Mailing Address State	Anytown CA 90001-0001 CR0523 - Mailing state.
Contact: Owner Mailing Address Type	Mailing Standard U.S., PO Box, Rural Route.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Field	Description
Contact: Owner Mailing Address Zip	Anytown CA 90001-0001 CR0523 - Mailing ZIP code.
Contact: Owner Mailing Address Zip 4	Anytown CA 90001-0001 CR0523 - Mailing ZIP plus 4 code.
Contact: Owner Mailing County	Mailing county of the property.
Contact: Owner Mailing FIPS	Mailing Federal Information Processing Standard (FIPS) code for the county.
Core-Based Statistical Area (CBSA) Name	Core-Based Statistical Area (CBSA) Name - A US geographic area defined by the Office of Management and Budget (OMB).
Count: Bathrooms	The total number of rooms used as bathrooms. Includes partial bathrooms. Value can be interpreted.
Count: Bedrooms	The number of rooms that can be qualified as bedrooms.
Count: Buildings	The number of buildings on the property.
Count: Fireplace	Indicates the number of fireplaces on a property.
Count: Rooms	The number of rooms for all the buildings on the property. If multiple buildings exist, the values are aggregated.
Count: Stories	The number of stories for the buildings on the property. If multiple buildings exist, the values are aggregated.
Count: Units	The number of units encompassed by the property.
Current First Position Mortgage Type	Based on the ATTOM Data Solutions Loan Model algorithm. Indicates the type of loan (conventional, construction, HELOC, or FHA). The model determines which loan is in the first lien position.
Current First Position Open Loan Amount	Based on the ATTOM Data Solutions Loan Model algorithm. The original amount of the loan that is modeled to be in the first lien position.
Current First Position Open Loan Document Number Formatted	Based on the ATTOM Data Solutions Loan Model algorithm. The recorded Document Number of the loan that is modeled to be in the first lien position.
Current First Position Open Loan Interest Rate	Based on the ATTOM Data Solutions Loan Model algorithm. The interest rate of the loan that is modeled to be in the first lien position.
Current First Position Open Loan Interest Rate Type	Based on the ATTOM Data Solutions Loan Model algorithm. When available, indicates the type of interest rate terms of the loan that is modeled to be in the first lien position. Left blank if unknown.
Current First Position Open Loan Lender Info Entity Classification	Based on the ATTOM Data Solutions Loan Model algorithm. The lender type of the loan that is modeled to be in the first lien position.
Current First Position Open Loan Lender Name First	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is a company, it indicates the complete lender name of the loan represented by the CurrentFirstPositionOpenLoanDocumentNumberFormatted field. If the lender is an individual, it indicates the lender's first name for the loan represented by the CurrentFirstPositionOpenLoanDocumentNumberFormatted field.

Field	Description
Current First Position Open Loan Lender Name Last	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is an individual, it indicates the lender's last name for the loan represented by the CurrentFirstPositionOpenLoanDocumentNumberFormatted field.
Current First Position Open Loan Recording Date	Based on the ATTOM Data Solutions Loan Model algorithm. The recording date of the Document associated with the loan that is modeled to be in the first lien position.
Current First Position Open Loan Type	Based on the ATTOM Data Solutions Loan Model algorithm. The type of loan (P-Purchase, R-Refinance, E-Equity) that is modeled to be in the first lien position.
Current Open Loan Amount	Current First Position Open Loan Amount + Current Second Position Open Loan Amount + Current Third Position Open Loan Amount.
Current Second Position Mortgage Type	Based on the ATTOM Data Solutions Loan Model algorithm. Indicates what type of loan (conventional, construction, HELOC, or FHA). The model determines which loan is in the second lien position.
Current Second Position Open Loan Amount	Based on the ATTOM Data Solutions Loan Model algorithm. The original amount of the loan that is modeled to be in the second lien position.
Current Second Position Open Loan Document Number Formatted	Based on the ATTOM Data Solutions Loan Model algorithm. The recorded Document Number associated with the loan that is modeled to be in the second lien position.
Current Second Position Open Loan Interest Rate	Based on the ATTOM Data Solutions Loan Model algorithm. The interest rate for the loan that is modeled to be in the second lien position.
Current Second Position Open Loan Interest Rate Type	Based on the ATTOM Data Solutions Loan Model algorithm. When available, indicates the type of interest rate terms for the loan that is modeled to be in the second lien position. Left blank if unknown.
Current Second Position Open Loan Lender Info Entity Classification	Based on the ATTOM Data Solutions Loan Model algorithm. The lender type for the loan that is modeled to be in the second lien position.
Current Second Position Open Loan Lender Name First	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is a company, it indicates the complete lender name for the loan represented by the CurrentSecondPositionOpenLoanDocumentNumberFormatted field. If the lender is an individual, it indicates the lenders first name for the loan represented by the CurrentSecondPositionOpenLoanDocumentNumberFormatted field.
Current Second Position Open Loan Lender Name Last	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is an individual, it indicates the lender last name for the loan represented by the CurrentSecondPositionOpenLoanDocumentNumberFormatted field.
Current Second Position Open Loan Recording Date	Based on the ATTOM Data Solutions Loan Model algorithm. The recording date of the Document associated with the loan that is modeled to be in the second lien position.
Current Second Position Open Loan Type	Based on the ATTOM Data Solutions Loan Model algorithm. The type of loan (P-Purchase, R-Refinance, E-Equity) that is modeled to be in the second lien position.
Current Third Position Mortgage Type	Based on the ATTOM Data Solutions Loan Model algorithm. Indicates the type of loan (conventional, construction, HELOC, FHA). The model determines which loan is in the third lien position.
Current Third Position Open Loan Amount	Based on the ATTOM Data Solutions Loan Model algorithm. The original amount of the loan that is modeled to be in the third lien position.

Field	Description
Current Third Position Open Loan Document Number Formatted	Based on the ATTOM Data Solutions Loan Model algorithm. The recorded Document Number of the loan that is modeled to be in the third lien position.
Current Third Position Open Loan Interest Rate	Based on the ATTOM Data Solutions Loan Model algorithm. The interest rate of the loan that is modeled to be in the third lien position.
Current Third Position Open Loan Interest Rate Type	Based on the ATTOM Data Solutions Loan Model algorithm. When available, indicates the type of interest rate terms of the loan that is modeled to be in the third lien position. Left blank if unknown.
Current Third Position Open Loan Lender Info Entity Classification	Based on the ATTOM Data Solutions Loan Model algorithm. The lender type of the loan that is modeled to be in the third lien position.
Current Third Position Open Loan Lender Name First	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is a company, it indicates the complete lender name for the loan represented by the CurrentThirdPositionOpenLoanDocumentNumberFormatted field. If the lender is an individual, it indicates the lenders first name for the loan represented by the CurrentThirdPositionOpenLoanDocumentNumberFormatted field.
Current Third Position Open Loan Lender Name Last	Based on the ATTOM Data Solutions Loan Model algorithm. If the lender is an individual, it indicates the lender last name for the loan represented by the CurrentThirdPositionOpenLoanDocumentNumberFormatted field.
Current Third Position Open Loan Recording Date	Based on the ATTOM Data Solutions Loan Model algorithm. The recording date of the Document associated with the loan that is modeled to be in the third lien position.
Current Third Position Open Loan Type	Based on the ATTOM Data Solutions Loan Model algorithm. The type of loan (P-Purchase, R-Refinance, E-Equity) that is modeled to be in the third lien position.
Deed Last Sale Date	The latest sale date in the format YYYY-MM-DD.
Deed Last Sale Price	The latest sale price.
Fireplace Type	Indicates the presence or absence of a fireplace. It also indicates the type of fireplace the property contains.
First Owner Type	Identifies whether the first owner is a company, an individual, a government, or unknown.
Flag: Loan	True if loan data exists.
Flag: Owner Occupied	Owner status (Absentee or Occupied). Logic based.
Flag: Parking Carport on Property	Indicates whether the property includes a carport and any information about carport.
Foundation Type	Indicates the type of foundation for the primary structure on the property.
Gross Area of All Structures (Square Footage)	Gross square feet of all structures on the property.
HVAC Cooling Type	Indicates the method or system used to provide cooling.
HVAC Heating Fuel Type	Indicates the primary heating fuel used.

Field	Description
HVAC Heating Type	Indicates the method or system used to provide heat.
Last Ownership Transfer Date	Last sale date for the most recent ownership transfer. Can be the same as the AssessorLastSaleDate. Can convey a non-arms-length transfer after the most recent sale in the format YYYY-MM-DD.
Lendable Equity	80% of the difference between the current market value represented by the AVM value and the sum of the current outstanding loan amounts.
Loan-to-Value Ratio (LTV)	Loan To Value calculated by dividing the sum of open loan amounts by the AVM value for the property.
Lot Area (Square Footage)	Indicates the lot size in square feet.
Lot Depth (Feet)	Indicates the lot depth in feet.
Lot Size (Acres)	Indicates the lot size in acres.
Lot Width (Feet)	Indicates the lot width in feet.
Metropolitan Statistical Area Name	Metropolitan Statistical Area Name as defined by the Office of Management and Budget (OMB).
Owner 1 Name Full	Full, unparsed name of first owner.
Owner 2 Name Full	Full, unparsed name of second owner.
Ownership Vesting Type	Indicates the ownership vesting held by the owners.
Parcel Number Formatted	Legacy Parcel. Deprecated. No longer supported.
Parcel Number Raw	Primary Parcel Number and unique identifier within the county or jurisdiction.
Parking Garage Area (Square Footage)	Garage square footage.
Parking Garage Type	Indicates whether the property includes a garage and any information about the garage, such as attached or detached.
Pool Type	Indicates whether the property includes a pool and any information about the pool.
Porch Area (Square Footage)	The total square footage of porches on the property.
Porch Type	Indicates whether the property includes a porch, and potentially the type of porch.
Previous Assessed Value	Previous Total assessed value.
Primary Exterior Wall Covering Material	Indicates the primary exterior wall covering material.
Property Address County	County where the property is situated.
Property Address State Code	State where the property is situated.
Property: Address City	Anytown CA 90001-0001 CR0523 - Site address city name.
Property: Address Full	123 1/2 N Main St. - Full site address line.
Property: Address State	Anytown CA 90001-0001 CR0523 - Site address state.

Field	Description
Property: Address Zip	Anytown CA 90001-0001 CR0523 - Site address ZIP Code.
Property: Address Zip 4	Anytown CA 90001-0001 CR0523 - Site address ZIP Plus 4 code.
Property: Jurisdiction Name	Name of the tax jurisdiction. Typically the county, with some exceptions. Exceptions are primarily in New England where the townships are the taxing authorities.
Property: Latitude	The latitude of the property in degrees.
Property: Longitude	The longitude of the property in degrees.
Property: Use (Detail)	Standardized value to describe property use. Derived from jurisdiction-specific zoned use value obtained from the Assessor.
Property: Use Group (Main)	General property type description, such as residential, commercial, or other.
Record Year Added	The year that the current Parcel Number was introduced into the ATTOM Data databases.
Roof Material	Indicates the primary finish material of which the roof is made.
Second Owner Type	Identifies if second owner is a company, individual, government, or unknown.
Structure Style Type	Indicates the structural style or the presence of specific style elements in the structure.
Subdivision Name	Subdivision name.
Tax: Assessed Value Improvements	Assessed value of the improvements.
Tax: Assessed Value Land	Assessed value of the land.
Tax: Assessed Value Total	Total assessed value.
Tax: Billed Amount	Tax Amount billed for Tax Year.
Tax: Fcal Year	The respective year of the property taxes being provided. Not always associated with values.
Tax: Market Value Improvements	Market value of the improvements.
Tax: Market Value Land	Market value of the land.
Tax: Market Value Total	Total market value.
Tax: Year Assessed	Year of assessed values.
Type of View From Property	Indicates whether there's an ocean or mountain or other amenable or disamenable view from the property.
Year Built (Adjusted for Structural Changes)	Adjusted year built based on condition and major structural changes of the structure.
Year Built (Primary Structure)	Year built of the primary structure.

## Fields for Business Data (USA)

Drum up more business when you make the most of public US business data available in Salesforce Maps. Filter and plot data layers that help you identify sales and service opportunities relevant to your business efforts.

Salesforce Maps works with data providers that supply business data. Periodically, these providers update their data, which means that your data layers reflect those updates. If the providers change their data formats, Salesforce Maps includes new data layers for you to plot on the map. Salesforce Maps can update, replace, or remove business data at any time.

Field	Description
7-digit SIC	The full length Standard Industrial Classification (SIC) code.
Company: Employer Identification Number (EIN)	The 9-digit ID that the IRS assigns to US businesses. Also known as: <ul style="list-style-type: none"> <li>Federal Employer Identification Number (FEIN)</li> <li>Federal Tax Identification Number</li> </ul>
Company: Fortune 1000 Branches	Branches of the Fortune 1000.
Company: Fortune 1000 Rank	Numeric rank in the Fortune 1000.
Company: Immediate Parent Company City	The city in which the business's immediate parent company is located.
Company: Immediate Parent Company Name	The name of the business's immediate parent company.
Company: Immediate Parent Company State	The state in which the business's immediate parent company is located.
Company: Location Type	The type of location: headquarters or branch.
Company: Name	The name of the company.
Company: Number of Linked Locations	Number of linked locations.
Company: Stock Exchange	Stock exchange on which the company's stock trades.
Company: Ticker Symbol	Indicates that a company issues stock or is part of a company that is openly traded.
Company: Total Employees (Corporate)	The number of individuals employed by the business at all of its branches, divisions, and subsidiaries. The number appears on single location and headquarter records. The number isn't the sum of Number of Employees, Location values of other members within the corporate family. For businesses with one location, the value in this field matches the Number of Employees, Location field. Some values are modeled.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



Field	Description
Company: Total Employees (Location)	The number of employees at this location. Some values are modeled.
Company: Ultimate Parent Company City	The city in which the business's parent company is located.
Company: Ultimate Parent Company Name	The name of the business's parent company.
Company: Ultimate Parent Company State	The state in which the business's parent company is located.
Company: Website	The website of the company.
Company: Year Established	The year that the company was established.
Company: Years in Business (Range)	The standardized range for the number of years the company is in business.
Contact: Area Code	Area code of the phone number.
Contact: Email	The email address of the listed contact at or owner of the company.
Contact: Fax Number	A fax number for the business.
Contact: First Name	The first name of the listed contact at the company.
Contact: Full Name	The full name of the listed contact at the company.
Contact: Gender	The gender of the contact at the company.
Contact: Last Name	The last name of the listed contact at or owner of the company.
Contact: Middle Initial	The middle initial of the listed contact at the company.
Contact: Phone Number	A phone number for the business.
Contact: Prefix	The prefix of the listed contact at or owner of the company. For example, Mr., Ms., Dr., or Rev.
Contact: Reported Job Title	The job title of the listed contact at or owner of the company as reported by the company.
Contact: Standardized Job Title	The standardized job title of the listed contact at or owner of the company.
Contact: Suffix	The suffix of the listed contact at or owner of the company.
Credit: Capacity	The maximum recommended extension of credit to the business based on a proprietary model that excludes credit bureau data. Don't use this information to make a credit decision.
Credit: Code	The credit rating of the company indicated by grade letter. Modeled using a proprietary calculation that excludes credit bureau data. Don't use this information to make a credit decision.
Credit: Description	The description of the credit rating of the company.
Credit: Score	The credit score of the company. Modeled using a proprietary calculation that excludes credit bureau data. Don't use this information to make a credit decision.
Expenses: Accounting	Estimated business expenditure on accounting services.

Field	Description
Expenses: Advertising	Estimated business expenditure on advertising.
Expenses: Business Insurance	Estimated business expenditure on insurance.
Expenses: Legal	Estimated business expenditure on legal services.
Expenses: Office Equipment	Estimated business expenditure on office equipment.
Expenses: Rent	Estimated business expenditure on rent.
Expenses: Technology	Estimated business expenditure on technology.
Expenses: Telecom	Estimated business expenditure on telecommunication services and equipment.
Expenses: Utilities	Estimated business expenditure on utilities.
Flag: Email Availability	Indicates whether an email address is associated with the contact.
Flag: Female Owned	Indication that the business owner is a woman.
Flag: Fortune 1000	Indicates whether company is listed in the Fortune 1000.
Flag: Franchise	Indicates whether a company is a part of a franchise.
Flag: Home-Based Business	Indication that business is home-based.
Flag: Manufacturing Location	Indication that manufacturing is performed at this business location.
Flag: Non-Profit	Indication of a not-for-profit organization.
Flag: Public Ownership	Indicates that a company issues stock or is part of a company that is openly traded.
Flag: Small Business	Indicates whether the company is a small business.
Location: 4-Digit ZIP	The 4-digit ZIP code extension.
Location: Carrier Route	A code identifying the individual mail carrier for mail delivery. If the business has both a physical and a mailing address, this code applies to the mailing address.
Location: City	The city where the company is located.
Location: Core-Based Statistical Area (CBSA)	The name of the metropolitan area as defined by the United States Office of Management and Budget (OMB). Previously known as MSAs or Metropolitan Statistical Areas.
Location: County Code (FIPS)	The code for the county where the company is located. Modeled using a proprietary calculation that excludes credit bureau data. Don't use this information to make a credit decision.
Location: County Name	The county where the company is located.
Location: Delivery Point	The digit assigned to every mailbox for all addresses in the US Postal Service. For example, apartments and office buildings.
Location: Delivery Point Check Digit	The digit assigned to every mailbox for all addresses in the US Postal Service. For example, apartments and office buildings.
Location: Geo Match Level	The degree of accuracy for the address down to the ZIP code level.

Field	Description
Location: Population of City (2010)	The 2010 population estimate for the metropolitan area.
Location: Square Footage	The area of the company workspace measured in square feet.
Location: State	2-digit Federal Information Processing Standard (FIPS) state code.
Location: Street Address	The street address of the company.
Location: Time Zone	The time zone of the company.
Location: Total Personal Computers (PC)	The range of the number of personal computers at the business location
Location: ZIP Code	The 5-digit ZIP code.
Mailing: 4-Digit ZIP	The 4-digit ZIP code extension.
Mailing: Carrier Route	A code identifying the individual mail carrier for mail delivery. If the business has both a physical and a mailing address, this code applies to the mailing address.
Mailing: City	The name of the city or town where the business receives mail.
Mailing: Delivery Point	The digit assigned to every mailbox for all addresses in the US Postal Service. For example, apartments and office buildings.
Mailing: Delivery Point Check Digit	The digit assigned to every mailbox for all addresses in the US Postal Service. For example, apartments and office buildings.
Mailing: Mail Deliverability	Indicates the risk that mail sent to the address can, for example, missorted, undelivered, delayed, or destroyed.
Mailing: Sectional Center Facility (SCF)	The Processing and Distribution Center (P&DC) of the US Postal Service (USPS) for the business mailing address.
Mailing: State	The standard 2-character USPS abbreviation for the state where the business receives mail.
Mailing: Street Address	The mailing address for the business in the form of a street address, a PO box number, a PO drawer number, or a Rural Route number.
Mailing: ZIP Code	The 5-digit ZIP code.
NAICS: Level 1 - Sector	The industry sector associated with the two-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 1 - Sector Code	The industry sector code associated with the 2-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 2 - Subsector	The industry subsector associated with the 3-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 2 - Subsector Code	The industry subsector code associated with the 3-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 3 - Industry Group	The industry group associated with the 4-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.

Field	Description
NAICS: Level 3 - Industry Group Code	The industry group code associated with the 4-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 4 - North American Industry	The North American Industry associated with the 5-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 4 - North American Industry Code	The North American Industry code associated with the 5-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 5 - US Industry	The US Industry associated with the six-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
NAICS: Level 5 - US Industry Code	The US Industry code associated with the 6-digit North American Industry Classification System (NAICS) code used by the federal government to classify businesses by industry.
Sales: Range (USD)	The range of total annual sales for this business. This element is modeled for most businesses in the database.
Sales: Total (USD)	The total annual sales for this business. This element is modeled for most businesses in the database.
SIC: Level 1 - Division	The industry associated with the lettered division of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with three more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 1 - Division Code	The industry code associated with the lettered division of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with three more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 2 - Major Group	The industry description associated with the 2-digit group number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 2 - Major Group Code	The industry description code associated with the 2-digit group number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 3 - Industry Group	The industry description associated with the 3-digit group number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 3 - Industry Group Code	The industry description code associated with the 3-digit group number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 4 - Industry	The industry description associated with the 4-digit number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This

Field	Description
	code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.
SIC: Level 4 - Industry Code	The industry description code associated with the 4-digit number of the Standard Industrial Classification (SIC) code developed by the US Government and enhanced by Database101 with 3 more digits. This code is assigned to businesses and other organizations, classifying and subdividing the activity performed by the establishment at that location.

## Requirements for Salesforce Maps Live Tracking

Ensure optimal tracking performance for your reps in the field when they meet minimum platform requirements for Live Tracking on the Salesforce Maps mobile app.

The Salesforce Maps mobile app shares minimum platform requirements for devices and networks with the Salesforce mobile app, but with some exceptions. Keep in mind that Salesforce can update minimum platform requirements for both mobile apps from time to time.

### Mobile Devices

For the best performance using Live Tracking on the Salesforce Maps mobile app, Salesforce requires any of these devices and their corresponding operating systems.

Device	Operating System
iPhone 8 or newer	iOS 14.0 or later
Samsung Galaxy S models S9 or newer	Android 8.0 or later
Google Pixel 2 or newer	

While Salesforce doesn't support using other devices and operating systems for Live Tracking, using them can still deliver adequate performance.

### Wireless Network Coverage

Performance for Live Tracking depends on a number of factors, including:

- Availability of A Wi-Fi or cellular network connection  
For Live Tracking, Salesforce requires connections to 4G LTE networks of 12 Mbps or faster.
- Your reps' geographical location
- The communications infrastructure surrounding your reps' geographical location

Expect differences in performance among your reps depending on their location, terrain, and the local communications infrastructure.

SEE ALSO:

[Salesforce Help: Requirements for the Salesforce Mobile App](#)

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer Editions**

## Single Sign-On Options for Mobile Devices

Streamline the log-in process so that your reps log in to Salesforce and Salesforce Maps at the same time.

Salesforce Maps supports SAML SSO with Salesforce as the service provider.

SEE ALSO:

[Salesforce Help: SAML SSO with Salesforce as the Service Provider](#)

## Salesforce Maps Advanced Setup

Reduce the time that sales and service managers and their reps spend planning customer visits. Automate schedules and routes for your reps as far out as three months. The visit plans that you create get your teammates facing more customers and driving fewer miles.

[The Basics of Salesforce Maps Advanced](#)

Automate your sales and service reps' schedules and routes for up to 3 months using Salesforce Maps Advanced. Review key use cases to get ideas for your own implementation and rollout.

[Implementing Salesforce Maps Advanced Routing](#)

Install and configure Salesforce Maps Advanced routing so that sales and service managers support their reps with optimized routes, visits, and schedules.

## The Basics of Salesforce Maps Advanced

Automate your sales and service reps' schedules and routes for up to 3 months using Salesforce Maps Advanced. Review key use cases to get ideas for your own implementation and rollout.

[What Is Salesforce Maps Advanced?](#)

Meet target sales touchpoints when you optimize routes and improve field efficiency.

[High-Level Tasks and Roles in Route Optimization](#)

Learn about roles in Salesforce Maps Advanced for sales and service managers and the field reps that they manage. And understand the tasks that managers and reps complete.

[Key Terms and Concepts for Salesforce Maps Advanced Routing](#)

Learn about terms and concepts that you encounter in Salesforce Maps Advanced before you implement it.

[Sample Scenarios for Salesforce Maps Advanced Routing](#)

Salesforce Maps Advanced routing supports complex use cases in pharmaceutical, consumer goods, food service, and other industries.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

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## What Is Salesforce Maps Advanced?

Meet target sales touchpoints when you optimize routes and improve field efficiency.

Salesforce Maps Advanced includes these features.

- **Route optimization for up to 3 months at a time.** For example, a pharmaceutical sales operations manager has 25 new field reps to onboard. Managers create initial routes for field reps, ensuring that the reps meet the minimum visit requirements for the medical offices that they support.
- **Thematic maps.** For example, a sales manager creates a heat map to color-code regions based on customer volume. Or, the sales manager color-codes regions by aggregated values, such as total opportunity value.
- **Data import for map layers.** For example, a sales manager imports potential medical office leads to see if any office locations overlap existing account locations.

### EDITIONS

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Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

## High-Level Tasks and Roles in Route Optimization

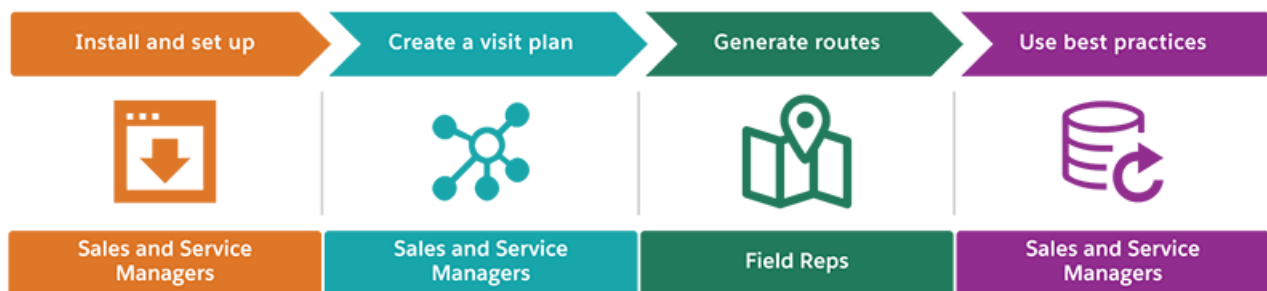
Learn about roles in Salesforce Maps Advanced for sales and service managers and the field reps that they manage. And understand the tasks that managers and reps complete.

Managers set up the product and visit plans, which are the templates for routes. Field reps generate their routes automatically, providing input, such as their days off and shift times.

### EDITIONS

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Available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions



High-Level Task	Details	Example
Install and set up	Typically, sales and service managers use their knowledge of company business rules and processes to set up Salesforce Maps Advanced.	A service manager sets up the product to give access to all service reps. The service manager creates a custom routable object called ServiceAccount to use for location data for the routes.
Create a visit plan	Before field reps can generate their routes, managers create a visit plan, or template. The visit plan contains	A retail sales manager creates a visit plan for store account reps that includes account and location data, weekly visit

High-Level Task	Details	Example
	the data, users, and criteria to optimize routes as much as possible, including visit windows.	frequency, and a custom visit window between 10:00 AM and 12:00 PM.
Generate routes	After providing their calendar and schedule information, field reps generate their routes. Visit plans then determine the best-fitting routes.	A restaurant sales rep decides to take off Friday, but the rep must fulfill the weekly visit target. When the rep generates the route, the product schedules account visits Monday through Thursday, avoiding the day off on Friday.
Use best practices	During the route generation lifecycle, managers identify areas to maintain and optimize in Salesforce Maps Advanced.	To keep Salesforce data up to date, a sales operations manager schedules periodic data sync batch jobs. In another example, a restaurant sales manager updates a visit plan to accommodate a Restaurant Week promotional period.

## Key Terms and Concepts for Salesforce Maps Advanced Routing

Learn about terms and concepts that you encounter in Salesforce Maps Advanced before you implement it.


### What's a Routable Object?

A standard or custom object containing location data that can be mapped. Salesforce Maps Advanced comes with standard Salesforce routable objects such as accounts, cases, contacts, leads, and opportunities. Your field reps visit locations on their routes, such as an account location.

 **Example:** You can create a custom routable object that contains retail store or dental office location data.


### What's a Visit Plan?

A template for creating a route. Visit plans collect the requirements for a route in one place, enabling you to easily regenerate routes with the same criteria if your calendar changes. Visit plans include routable objects to represent accounts or visits, a list of reps who perform the visits, start and end dates, and other settings such as shift times.

 **Example:** You can create a visit plan for a pharmaceutical sales team's quarter. The plan contains all providers that require visits and their respective visit targets and cadences for October through December.

### What's a Visit Window?

A timeframe in which a customer or prospect accepts visits from a rep. A visit window can include specific days in the week or even certain hours during the day. You specify visit windows in visit plans. After visit windows are set, Salesforce Maps Advanced schedules all future visits within these windows. If you don't specify visit windows in the visit plan, Salesforce Maps Advanced schedules visits within the reps' working hours and the visit plan start and end dates.

 **Example:** A doctor's office has a visit window of Monday through Thursday, 2:00 PM to 4:00 PM. A restaurant has a visit window during their slow time of 10:00 AM to 11:30 AM.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**



## What's the Relationship Between Visit Plans and Routes?

Optimized routes are the output of visit plans. When a field rep generates a route in Salesforce Maps Advanced, the visit plan tells the product the requirements for the route. Reps can regenerate routes from visit plans whenever their schedules and other criteria change, such as customer visit windows and days off.

## What's an Output Object?

A standard or custom object that represents a scheduled visit after a rep generates a route. By default, output is events on reps' Salesforce calendars.



**Example:** You can create a custom output object that represents a visit in Consumer Goods Cloud.

### [Days Between Visits](#)

Learn how Salesforce Maps Advanced determines the dates for customer visits by using minimum and maximum days between visits.

### SEE ALSO:

[Create a Custom Routable Object](#)

[Creating Visit Plans](#)

[Create Shared Visit Windows for Individual Routable Object Records](#)

[Creating a Custom Output Object for Visits](#)

## Days Between Visits

Learn how Salesforce Maps Advanced determines the dates for customer visits by using minimum and maximum days between visits.

Minimum and maximum days between visits, or visit frequency, determine when the next customer visit occurs. When you create a visit plan, you specify the visit frequency by entering the number of days or by specifying object fields containing the number of days.



**Example:** During a 3-month planning period, your account requires three visits, or one a month. You divide the total days in the period (90) by the number of expected visits (3) to get 30 days maximum between visits. In your visit plan, you specify the maximum days between visits as 30. To increase the likelihood of visits occurring within those 30 days, you set the minimum days between visits as 27.

To adhere to the minimum and maximum days between visits, we see that the rectangles show when visits can occur. The circles show the days that Salesforce Maps Advanced scheduled the visits.

### EDITIONS

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M	T	W	T	F	S	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

## SEE ALSO:

[Specify Visit Frequency, Duration, and Visit Windows](#)

[Create Shared Visit Windows for Individual Routable Object Records](#)

[Set Up Visit Window Selection for Specific Routable Object Records](#)

## Sample Scenarios for Salesforce Maps Advanced Routing

Salesforce Maps Advanced routing supports complex use cases in pharmaceutical, consumer goods, food service, and other industries.

### [Route Planning and Coverage for Pharmaceutical Reps](#)

Suppose you're a pharmaceutical sales operations manager with 25 new field reps to onboard. Use Salesforce Maps Advanced routing to create routes for the field reps' first month, to help ensure that they meet the visit targets for the medical offices that they support. Use the following checklist to assemble your data and criteria before you generate routes.

### [Complex Visit Frequencies and Windows for Consumer Goods Reps](#)

Suppose you're a retail sales manager using Consumer Goods Cloud to support brick-and-mortar store accounts and seasonal retail pop-up stores. It can be a challenge to balance routes to maintain customer satisfaction and meet visit targets. And you want to avoid burning out your reps. Use this checklist to assemble your data and criteria before you generate routes in Salesforce Maps Advanced.

### [Visit Prioritization for Restaurant Account Reps](#)

Suppose you're a restaurant sales manager with reps who service food and beverage accounts. In November, your region has a Restaurant Week promotion. Clients who participate in the promotion require higher visit frequencies. And Restaurant Week clients are prioritized over other clients for that week. Your challenge is to ensure that they're prioritized without manually creating routes to optimize reps' workload and to accommodate days off. Use this checklist to assemble your data and criteria before you generate routes in Salesforce Maps Advanced.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Route Planning and Coverage for Pharmaceutical Reps

Suppose you're a pharmaceutical sales operations manager with 25 new field reps to onboard. Use Salesforce Maps Advanced routing to create routes for the field reps' first month, to help ensure that they meet the visit targets for the medical offices that they support. Use the following checklist to assemble your data and criteria before you generate routes.

 **Note:** Salesforce Maps Advanced schedules reps for in-person visits only.

### Pre-Implementation Checklist

Requirement	Scenario Details
Calendar object	The object that represents rep visits. In this scenario, rep visits appear as events on your reps' Salesforce calendars, so your calendar object is the Event object.
Routable object for location data	The object containing the locations of your medical office accounts. In this scenario, assume that your Accounts object contains location data. If it doesn't, create a custom object that contains the location data.  With location data you can generate the most efficient routes for your reps.
Visit frequency and visit windows	In this scenario, the minimum and maximum days between visits are 10 and 30 days, respectively. Office business hours are 9 AM to 5 PM.
Visit object	The object containing data about whether your reps have completed a visit. In this scenario, your visit object is the Task object.
Assigned accounts	Accounts are assigned to reps through a user lookup field on the routable object. In this scenario, the account owner is responsible for visiting the medical offices. When you generate routes, the optimization process adds stops to your reps' schedules for the accounts that they own.
Visit timeframe	You're generating routes for the month of January, so your start date is January 1 and the end date is January 30.
Maximum shift length and other settings	Your field reps have a maximum shift of 8 hours.

Conflicting events on your reps' calendars, such as days off, are accounted for when Salesforce Maps Advanced creates routes. You can regenerate routes at any time to accommodate changes such as rep rescheduling or company holidays.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Complex Visit Frequencies and Windows for Consumer Goods Reps

Suppose you're a retail sales manager using Consumer Goods Cloud to support brick-and-mortar store accounts and seasonal retail pop-up stores. It can be a challenge to balance routes to maintain customer satisfaction and meet visit targets. And you want to avoid burning out your reps. Use this checklist to assemble your data and criteria before you generate routes in Salesforce Maps Advanced.

 **Note:** Salesforce Maps Advanced schedules reps for in-person visits only.

### Pre-Implementation Checklist

Requirement	Scenario Details
Calendar object	The object that represents rep visits. In this scenario, rep visits are represented by visit records in Consumer Goods Cloud, so you add a lookup relationship to the visit object in Routes & Schedule in Setup.
Routable object for location data	The object containing the locations of your retail accounts. In this scenario, you use the Retail Store object, with location information in that object. With location data you can generate the most efficient routes for your reps.
Visit frequency and visit windows	In this scenario, the Retail Stores object contains formula fields for minimum and maximum days between visits derived from quarterly visit requirements. The Retail Stores object looks up to visit windows that contain standard business hours and temporary visit windows for seasonal businesses.
Visit object	The object containing data about whether your reps have completed a visit. In this scenario, your visit object is the Visit object in Consumer Goods Cloud.
Assigned accounts	Accounts are assigned to reps through a user lookup field on the routable object. In this scenario, the account owner is responsible for visiting stores. When you generate routes, the optimization process adds stops to your reps' schedules for the accounts that they own.
Visit timeframe	You're generating routes for the fourth quarter of the calendar year, so your start date is October 1 and the end date is December 31.
Maximum shift length and other settings	Your field reps have a maximum shift of 7 hours.

### Example for Determining Days Between Visits

Your customers expect three visits every quarter.

Determine	By Using this Method
Maximum days	Calculate the number of days in the quarter. $90 \text{ days} / 3 \text{ months} = 30 \text{ days maximum between visits}$
Minimum days	Decide on a number of days between visits that's less than 30 so that optimizations can adjust visit schedules and increase the likelihood of achieving full coverage.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer Editions**

## Customers Who Require Special Visit Schedules


When visit requirements for customers vary, you can route reps through the same neighborhoods multiple times. To help your reps avoid repeat trips through the same neighborhoods on different days, cluster visits geographically. To do so, determine a common denominator for the minimum days between visits such as 7, 14, 21, or 28.

### SEE ALSO:

[Salesforce Help: Retail Execution for Sales Managers](#)

## Visit Prioritization for Restaurant Account Reps

Suppose you're a restaurant sales manager with reps who service food and beverage accounts. In November, your region has a Restaurant Week promotion. Clients who participate in the promotion require higher visit frequencies. And Restaurant Week clients are prioritized over other clients for that week. Your challenge is to ensure that they're prioritized without manually creating routes to optimize reps' workload and to accommodate days off. Use this checklist to assemble your data and criteria before you generate routes in Salesforce Maps Advanced.

 **Note:** Salesforce Maps Advanced schedules reps for in-person visits only.

### Pre-Implementation Checklist

Requirement	Scenario Details
Calendar object	The object that represents rep visits. In this scenario, rep visits are represented by events on your reps' Salesforce calendars, so your calendar object is the Event object.
Routable object for location data	The object containing the locations of your food and beverage accounts. In this scenario, assume that your Accounts object contains location data. If it doesn't, create a custom object that contains the location data.  You also have a custom routable object, RW_Accounts, that contains Restaurant Week account locations only. You prioritize the RW_Accounts object over the Accounts object when you create routes for your reps. Prioritization means that Salesforce Maps Advanced schedules Restaurant Week clients sooner on reps' calendars so that they meet or exceed the maximum number of visits scheduled.
Visit frequency and visit windows	In this scenario, the Accounts object contains fields for visit target numbers for the quarter and visit target numbers for Restaurant Week.
Visit object	The object containing data about whether your reps have completed a visit. In this scenario, your visit object is the Task object.
Assigned accounts	Accounts are assigned to reps through a user lookup field on the routable object. In this scenario, the account owner is responsible for visiting the restaurants. When you generate routes, the optimization process adds stops to your reps' schedules for the accounts that they own.
Visit timeframe	You're generating routes for the month of November, so your start date is November 1 and the end date is November 30.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Requirement	Scenario Details
Maximum shift length and other settings	Your field reps have a maximum shift of 8 hours.

## Implementing Salesforce Maps Advanced Routing

Install and configure Salesforce Maps Advanced routing so that sales and service managers support their reps with optimized routes, visits, and schedules.

### [Preparing for Routing Automation](#)

Get systems, processes, and people in place before you create visit plans in Salesforce Maps Advanced routing. Before you begin, confirm that you installed Salesforce Maps and gave users access to it and to Salesforce Maps Advanced.

### [Creating Visit Plans](#)

In Salesforce Maps Advanced, sales and service managers create visit plans that contain the input for reps' routes.

### [Fine-Tuning Your Routing Implementation](#)

To streamline your business processes, refine your routing implementation after you set up Salesforce Maps Advanced and create a visit plan. For example, create predefined visit windows for chains and franchises and then share them with your reps to apply to their accounts.

### [Best Practices for Routing Success](#)

As you implement Salesforce Maps Advanced, observe these best practices.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

## Preparing for Routing Automation

Get systems, processes, and people in place before you create visit plans in Salesforce Maps Advanced routing. Before you begin, confirm that you installed Salesforce Maps and gave users access to it and to Salesforce Maps Advanced.

### [Designate an OAuth User for Route Optimizations](#)

Assign yourself or a colleague as the OAuth user. Salesforce Maps Advanced processes route optimizations through the OAuth user on Salesforce Maps servers. That way, no one is affected during intensive system processing.

### [Keep Salesforce Data up to Date](#)

Schedule batches to send and receive data to Salesforce Maps Advanced routing.

### [Creating a Custom Output Object for Visits](#)

Set up Salesforce Maps Advanced to create events on reps' calendars as the output of creating routes. If you don't want to use events to represent visits, create a custom output object. For example, you can create a custom output object based on visits in Consumer Goods Cloud.

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### [Create a Custom Routable Object](#)

Salesforce Maps Advanced comes with the following standard routable objects: accounts, cases, contacts, leads, and opportunities. If you want to use a different object containing location data for your customers, create a custom routable object.

#### SEE ALSO:

[Installing and Giving Access to Salesforce Maps](#)

[Rollout Guidelines](#)

## Designate an OAuth User for Route Optimizations

Assign yourself or a colleague as the OAuth user. Salesforce Maps Advanced processes route optimizations through the OAuth user on Salesforce Maps servers. That way, no one is affected during intensive system processing.

Regardless of who creates and manages visit plans and schedules, Salesforce Maps Advanced has processes that work through the OAuth user.

1. To designate yourself as the OAuth user, log in to Salesforce with your username and password. To designate a colleague, ask that person to log in to Salesforce with their username and password.

The person you designate as the OAuth user completes the rest of this configuration.

2. Confirm that you have the following:
  - A role that is above the Salesforce Maps Advanced end users' role in the Salesforce hierarchy.
  - Access to Salesforce Maps Advanced. Specifically, the SF Maps and SF Maps Advanced permission sets assigned to you.
  - Access to the Salesforce objects used in the visit plan process, such as the Account, Event, and Task objects.
3. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
4. Next to the Salesforce Maps package, click **Configure**.
5. Select **OAuth**.
6. Click **Authorize**.



7. Click **Allow Access**.

#### SEE ALSO:

[Salesforce Help: Controlling Access Using Hierarchies](#)

#### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

#### USER PERMISSIONS

To customize settings:

- Customize Application

## Keep Salesforce Data up to Date

Schedule batches to send and receive data to Salesforce Maps Advanced routing.

1. Identify your OAuth user, and have that user log in to Salesforce with their username and password.
2. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
3. Next to the Salesforce Maps package, click **Configure**.
4. Under Maps Advanced, select **Data Management**.
5. Click **Schedule Advanced Batches**.

A Batches Scheduled message appears. About every hour, the product checks to see if there are any visit plans with route optimization scheduled. If there are, route and schedule data is updated in those visit plans.

It's not recommended, but if you want to disable scheduled batches for all visit plans, delete the Advanced Route Reoptimization Template Batch job in

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Advanced Route Debug Log Deletion Batch	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 5:00 AM	12/01/2022 5:00 AM	Scheduled Apex
Del	Advanced Route Reoptimization Template Batch	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 6:00 AM	11/01/2022 7:00 AM	Scheduled Apex
Del	Advanced Route Stalled Routing Batch Check	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 6:00 AM	11/01/2022 7:00 AM	Scheduled Apex

Setup.

SEE ALSO:

[Designate an OAuth User for Route Optimizations](#)

## Creating a Custom Output Object for Visits

Set up Salesforce Maps Advanced to create events on reps' calendars as the output of creating routes. If you don't want to use events to represent visits, create a custom output object. For example, you can create a custom output object based on visits in Consumer Goods Cloud.

1. [Create a Lookup Relationship Between Your Custom Object and Waypoints](#)  
After you create your custom object for Salesforce Maps Advanced output, create a lookup relationship with the Maps Advanced Route Waypoint object.
2. [Create a Custom Event](#)  
To ensure that your custom object's records appear on your reps' schedules in Salesforce Maps Advanced, create a custom event.

SEE ALSO:

[Salesforce Help: Create a Custom Object](#)

### EDITIONS

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### EDITIONS

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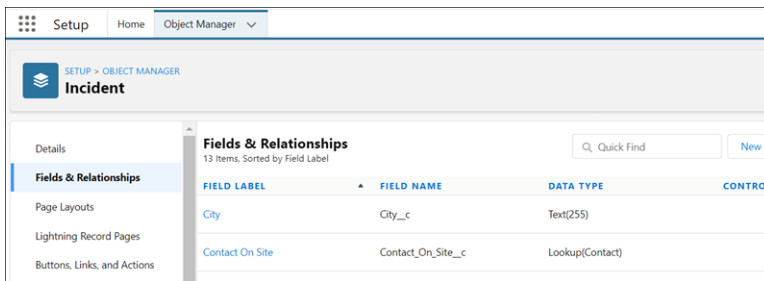
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions



## Create a Lookup Relationship Between Your Custom Object and Waypoints

After you create your custom object for Salesforce Maps Advanced output, create a lookup relationship with the Maps Advanced Route Waypoint object.

1. From Setup, in the Quick Find box, enter *object*, and then select **Object Manager**.
2. Create and name your custom object in Object Manager.
3. Select **Fields & Relationships**, and then click **New**.



4. On the New Custom Field page, under Data Type, select **Lookup Relationship**, and then click **Next**.
5. From the Related To list, select **Maps Advanced Route Waypoint**, and then click **Next**.
6. On the New Relationship page, specify the field label and field name, and then click **Next**.
  - a. Field Label: *Maps Advanced Route Waypoint*
  - b. Field Name: *WA\_AdvRouteWaypoint*
7. Configure optional field-level security and other settings for the custom object, and then save your work.

Next, create a custom event to ensure that your custom object's records appear on your reps' schedules.

## Create a Custom Event

To ensure that your custom object's records appear on your reps' schedules in Salesforce Maps Advanced, create a custom event.

1. From Setup, in the Quick Find box, enter *Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Select **Routes & Schedule**, and then click **Custom Event**.
4. In the Create Custom Event Config window, select your custom object from the list, and then click **Confirm**.
5. On the Event Object Configuration page, configure these settings.

Setting	Description
Name	The name of the custom activity object as you want it to appear in Salesforce Maps Schedule.
Scheduling Resource	The owner or assignee for custom activity records. Select a field that includes the ID of the owner or assignee, such as OwnerID.
Event Name Field	The name of each custom activity record.

### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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### USER PERMISSIONS

To customize settings and create and edit custom objects:

- Customize Application

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To customize settings and create and edit custom objects:

- Customize Application

Setting	Description
Time Fields	The time configuration relevant to your custom activity object. Select <b>Use Start DateTime and End DateTime</b> .
Start Date Time Field	The Salesforce field that represents the start date/time.
End Date Time Field	The Salesforce field that represents the end date/time or duration.

6. Turn on **Enabled**, and then save your work.

SEE ALSO:

[Salesforce Help: Set Up Schedules to Include Custom Activities](#)

## Create a Custom Routable Object

Salesforce Maps Advanced comes with the following standard routable objects: accounts, cases, contacts, leads, and opportunities. If you want to use a different object containing location data for your customers, create a custom routable object.

After you create your custom object in Object Manager, create a lookup relationship between your object and the Maps Advanced Route Waypoint object.

1. From Setup, in the Quick Find box, enter *Object*, and then select **Object Manager**.
2. Select the **Maps Advanced Route Waypoint** object.
3. Select **Fields & Relationships**, and then click **New**.
4. On the New Custom Field page, under Data Type, select **Lookup Relationship** and click **Next**.
5. From the Related To list, select your custom object, and click **Next**.
6. On the New Relationship page, specify the field label and field name, and then click **Next**.  
You use Consumer Goods Cloud, and your custom routable object is RetailStore. The field label is *RW\_RetailStore*, and the field name is *RW\_RetailStore\_\_C*.
7. Configure optional field-level security and other settings for the custom object, and then click **Save**.

SEE ALSO:

[Salesforce Help: Create a Custom Object](#)

### EDITIONS

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### USER PERMISSIONS

To create and edit custom objects:

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## Creating Visit Plans

In Salesforce Maps Advanced, sales and service managers create visit plans that contain the input for reps' routes.

### 1. [Visit Plans Checklist](#)

Before you create a visit plan in Salesforce Maps Advanced, make sure that you have the data and criteria you need, such as custom objects.

### 2. [Name and Describe Your Visit Plan](#)

The name and description of the visit plan appear on the Visit Plans page in Salesforce Maps Advanced.

### 3. [Select a Calendar Object for Output](#)

In Salesforce Maps Advanced, standard event or custom object records are the output from route generation. For example, if the Event object is the calendar object, then events appear on your reps' calendars after reps generate routes.

### 4. [Creating and Prioritizing Datasets](#)

In Salesforce Maps Advanced, a dataset is a collection of customer records containing location data for routing. Use datasets in your visit plan to determine the customers placed on routes, the reps assigned to routes, and how often customers are visited. To create routes that align with your business priorities, prioritize datasets in the visit plan.

### 5. [Assign Users to Your Visit Plan](#)

You can assign users or user profiles to a visit plan to generate routes for those users. After you save the visit plan, assigned users receive an email instructing them on how to generate routes in Salesforce Maps Advanced.

### 6. [Define Required Visit Plan Settings](#)

In Salesforce Maps Advanced, set the route planning period and the number of routes to include when you generate routes. Also, specify how often to regenerate (optimize) routes during the planning period.

### 7. [Specify Visit and Optimization Parameters](#)

Tailor routes in Salesforce Maps Advanced when you prevent scheduling more than one visit during a shift and limit the length of shifts. Specify maximum drive time between stops, and choose your preferred speed to optimize non-batched routes. Keep in mind, as a by-product of these constraints, optimizations can be less efficient and deliver fewer routes to reps.

### 8. [Review and Save Your Visit Plan](#)

After you specify all your visit plan requirements and settings, review and save your plan. After you save it, assigned users receive an email instructing them on how to generate routes in Salesforce Maps Advanced.

## Visit Plans Checklist

Before you create a visit plan in Salesforce Maps Advanced, make sure that you have the data and criteria you need, such as custom objects.

### EDITIONS

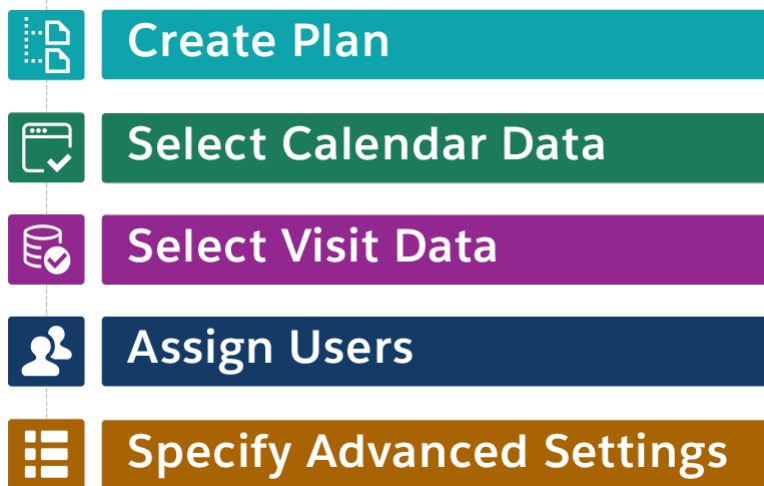
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High-Level Task	Questions to Answer	Example
Create a plan	<p>In your company, who creates and maintains visit plans?</p> <p>Visit plans require a dedicated person to keep them current and relevant for reps.</p>	<p>To create and update visit plans, a retail operations manager requires the Maps Admin, SF Maps, and SF Maps Advanced permission sets.</p> <p>To generate routes, the manager's reps require the SF Maps and SF Maps Advanced permission sets.</p>
Select calendar data	<p>How do you represent reps' visits on their schedules?</p> <p>Events are standard. Anything else needs a custom output object.</p>	<p>You use events to represent retail reps' visits on their calendars, so you use the Event object for the output object.</p>
Select visit data	<ul style="list-style-type: none"> <li>Which Salesforce object containing location data do you want to use?</li> </ul> <p>Accounts, cases, contacts, leads, and opportunities are standard. Anything else needs a custom routable object.</p> <ul style="list-style-type: none"> <li>Do you want to route multiple objects?</li> <li>Do you have visit frequency or prioritization fields in Salesforce that you want to use in the scheduling process?</li> <li>Do you have a target number of visits, minimum days between visits, or time to complete a visit?</li> <li>Do your accounts have visit windows?</li> <li>Do your accounts have a promotional period?</li> </ul>	<p>You use Consumer Goods Cloud and your custom routable object is RetailStore. That RetailStore object contains formula fields for minimum and maximum days between visits based on quarterly visit requirements.</p> <p>The object looks up to visit windows that contain standard business hours and temporary visit windows for seasonal businesses.</p>
Assign users	<ul style="list-style-type: none"> <li>Are routable records owned by a single user or shared between users? User lookup fields on routable objects determine your reps' account assignments.</li> <li>Do reps have Salesforce licenses to generate their own routes?</li> </ul>	<p>The account owner is responsible for visiting stores. When you generate routes, the optimization process adds stops to your reps' schedules for the accounts that they own.</p>

High-Level Task	Questions to Answer	Example
Specify advanced settings	<ul style="list-style-type: none"> <li>• What timeframe do you want the visit plan to cover?</li> <li>• Do you update route data periodically during the visit plan timeframe? For example, when integrated systems update data or when reps use administrative time.</li> <li>• Do your reps frequently reschedule visits during the day?</li> <li>• Does your organization limit the number of hours employees can work? For example, for part-time employees or overtime restriction compliance.</li> </ul>	You decide the visit plan applies to routes for your next business quarter. You choose to optimize routes weekly. You allow a shift length of no more than 4 hours for part-time reps.

## Name and Describe Your Visit Plan

The name and description of the visit plan appear on the Visit Plans page in Salesforce Maps Advanced.

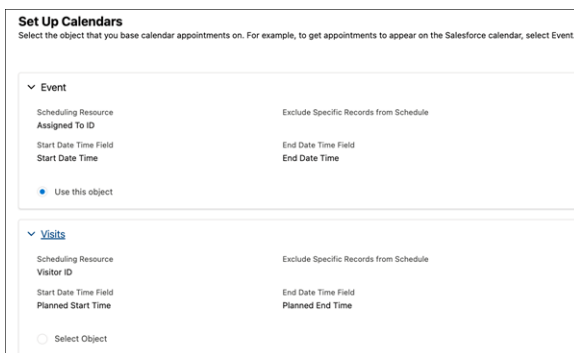
1. Make sure that you have the Maps Admin, SF Maps, and SF Maps Advanced permission sets assigned to you.
2. From the App Launcher, find and select **Maps Advanced Visit Plans**.
3. Click **New Visit Plan**.
4. In the New Plan wizard, under Name Your Plan, enter a name and description for your visit plan.
5. Click **Next**.  
Set Up Calendars appears in the visit plan wizard.

 **Example:** Your visit plan generates routes for reps to visit high-priority customers in December. You name your plan *December Routes* and add a description of *This plan focuses on Platinum accounts for seasonal releases.*

## Select a Calendar Object for Output

In Salesforce Maps Advanced, standard event or custom object records are the output from route generation. For example, if the Event object is the calendar object, then events appear on your reps' calendars after reps generate routes.

1. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Set Up Calendars**.
2. Below the object that you want to use as output for your visit plan, click **Use this object**.



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### 3. Click **Next**.

Prioritize Data Sets appears in the visit plan wizard.



**Example:** The output for your visit plan is Consumer Goods Cloud visit records. You create a custom object based on the Consumer Goods Cloud visit object and select that object as your calendar output object.

#### SEE ALSO:

[Creating a Custom Output Object for Visits](#)

[Configuring Schedules](#)

## Creating and Prioritizing Datasets

In Salesforce Maps Advanced, a dataset is a collection of customer records containing location data for routing. Use datasets in your visit plan to determine the customers placed on routes, the reps assigned to routes, and how often customers are visited. To create routes that align with your business priorities, prioritize datasets in the visit plan.

### [Creating Datasets for Generating Routes](#)

To generate routes in Salesforce Maps Advanced, every visit plan requires at least one dataset. If your visit plan has customer groups with different visit requirements, create additional datasets that represent those customers. For example, you have reps who visit both leads and accounts, so you create separate datasets that represent them in your visit plan.

### [Prioritize Datasets in Salesforce Maps Advanced](#)

You can prioritize certain customer visits over others, which increases the likelihood that they're scheduled sooner and reps meet visit targets earlier. For example, if you have accounts that have different visit targets than leads, create a separate dataset, and make it the highest priority.

### Creating Datasets for Generating Routes

To generate routes in Salesforce Maps Advanced, every visit plan requires at least one dataset. If your visit plan has customer groups with different visit requirements, create additional datasets that represent those customers. For example, you have reps who visit both leads and accounts, so you create separate datasets that represent them in your visit plan.

#### 1. [Name Your Dataset and Select a Routable Object](#)

To generate routes in Salesforce Maps Advanced, every dataset in a visit plan requires a routable object. Routable object records represent the customer locations reps visit, such as accounts.

#### 2. [Select Routable Records and Assign Users](#)

In your Salesforce Maps Advanced dataset, select the records you want to route and indicate the field to determine the user responsible for visiting customer locations. For example, an account rep or merchandiser user.

#### 3. [Specify Visit Frequency, Duration, and Visit Windows](#)

In Salesforce Maps Advanced, specify your visit requirements manually or get them from fields in a routable object.

#### 4. [Accommodate Prescheduled Visits](#)

If reps have appointments on their calendars that Salesforce Maps Advanced didn't generate, you can include them when you generate routes. Including prescheduled visits in the visit plan ensures that they count towards reps' visit targets.

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5. [Reschedule Missed Visits in Salesforce Maps Advanced](#)

To reschedule missed visits during route optimization, specify how your reps log completed visits.

6. [Show Waypoint Tooltips on Maps](#)

When reps view their routes in Salesforce Maps Advanced, you can display additional information in waypoint tooltips. Waypoints are output records, such as visit records, that appear on reps' schedules and routes.

7. [Specify Default Output Record Values](#)

To create more comprehensive, detailed output records, specify default field values for the records that the visit plan creates in Salesforce Maps Advanced.

8. [Specify Promotional Periods](#)

To support customer promotions in Salesforce Maps Advanced, prioritize visits to customers within a particular timeframe. This timeframe is in addition to the visit frequency requirements specified in the dataset. By default, one additional visit is scheduled to the customer location during the promotional window.

### Name Your Dataset and Select a Routable Object

To generate routes in Salesforce Maps Advanced, every dataset in a visit plan requires a routable object. Routable object records represent the customer locations reps visit, such as accounts.

1. Confirm that you've created at least one base object in Salesforce Maps.
2. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Prioritize Data Sets**.
3. Click **Create a DataSet**.
4. In the dataset wizard, enter a name and description for your dataset.
5. Under Base Object, select the routable object that contains the location data that you want to use in your visit plan. If you don't see the routable object that you want, you can create a custom routable object.

Base Object	Object Type	Description
<input checked="" type="radio"/> Account (Billing)	Account	
<input type="radio"/> Account SHIPPING	Account	

6. Click **Next**.  
User assignments and record filters appear in the dataset wizard.

SEE ALSO:

[Create a Custom Routable Object](#)

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### Select Routable Records and Assign Users

In your Salesforce Maps Advanced dataset, select the records you want to route and indicate the field to determine the user responsible for visiting customer locations. For example, an account rep or merchandiser user.

1. In the dataset wizard, from the Assigned User Field Mapping list, select the lookup field that represents the user who is responsible for visiting locations in the dataset. For example, a Route Driver field.
2. If your user field is in a child object related to the routable object, select **Use rep assignment from a related object** and complete the following fields.

This field...	Contains...
Child Object	An object containing the user field, such as the rep.
Relationship Field	A field that relates the child object to the routable object.
Assignment Field	A field that represents the user who is responsible for visiting locations in the dataset.
Assignment Criteria	Filter criteria to narrow down the users to use for record assignment.

3. Under Field Filters, add filter criteria to narrow down the records that you want to route in the dataset. For example, you want to limit your dataset to customers in Sydney, Australia, so you add filter criteria for the Billing City field. If you don't add any filters, all records with the user criteria that you specified are included in your dataset.

4. Click **Next**.  
Visit requirements appear in the dataset wizard.



**Example:** You use the Account object as your routable object for the dataset. Related Account Team Member object records represent account users. Because there can be multiple team members per account, you filter user records to those records with a Team Role field that equals *Account Manager* to use in the dataset.

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## Specify Visit Frequency, Duration, and Visit Windows

In Salesforce Maps Advanced, specify your visit requirements manually or get them from fields in a routable object.

- In the dataset wizard, under Visit Requirements, enter the days between visits in **Minimum Days** and **Maximum Days**. As a shortcut, select a frequency from the Suggested Frequency list.  
For example, each account requires three visits over a 90-day period, or one a month. You divide the total days in the period by the number of expected visits, and you set Maximum Days to 30 and Minimum Days to 27.
- If an object field contains your visit frequency, select the field from **Value from Selected Field**. If the field doesn't contain a value, then routes use the values in **Minimum Days** and **Maximum Days**.

- Enter visit duration and buffer time in minutes, or select the field from **Value from Selected Field**.  
Buffer time is additional time to add to the Salesforce-calculated travel time between visits to account for unexpected delays, such as traffic congestion. Or, time for reps to take notes or walk across large parking facilities.
- Under Visit Windows, specify the days and times for customer visits for this dataset.
  - If a field on your routable object contains your visit window, select that field from the **Field Associated to Advanced Visit Windows** list.
  - If there are two windows for visits on the same day, you can add a window.

Day	Visit Window 1	Visit Window 2
SUNDAY	From: 9:00 AM To: 5:00 PM	From: 9:00 AM To: 5:00 PM
MONDAY	From: 9:00 AM To: 5:00 PM	From: 9:00 AM To: 5:00 PM
TUESDAY	From: 9:00 AM To: 5:00 PM	From: 9:00 AM To: 5:00 PM
WEDNESDAY	From: 9:00 AM To: 5:00 PM	From: 9:00 AM To: 5:00 PM
THURSDAY	From: 9:00 AM To: 5:00 PM	From: 9:00 AM To: 5:00 PM

For example, store franchise customers prefer visits from 9:00 AM to 11:00 AM, and then again from 1:00 PM to 4:00 PM.

- Click **Next**.  
Field filters for future visits appear in the dataset wizard.

### SEE ALSO:

[Set Up Visit Window Selection for Specific Routable Object Records](#)  
[Days Between Visits](#)

## EDITIONS

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## Accommodate Prescheduled Visits

If reps have appointments on their calendars that Salesforce Maps Advanced didn't generate, you can include them when you generate routes. Including prescheduled visits in the visit plan ensures that they count towards reps' visit targets.


Track manually scheduled visits in the output object for your visit plan. For example, if you use the Event object as your output (calendar) object, then event records represent manually scheduled visits.

1. In the dataset wizard, under Field Filters, add filter criteria to narrow down the records representing scheduled visits that you want to include in the dataset.

For example, reps use the Visit Type field in your routable object to indicate whether a customer visit is virtual or on-site. Under Field Filters, you set Visit Type to *On-site Meeting* to include only on-site meeting records when you generate routes.

2. Click **Next**.

The object and fields that represent completed visits appear in the dataset wizard.

 **Example:** The custom output object for your visit plan is based on the Consumer Goods Cloud Visit object. Reps can also create visits manually. When reps create a visit, they set the Call Type to *Visit* and the Status to *Planned*. You include this criteria as a filter to ensure that these visits are included when the rep generates routes.

## Reschedule Missed Visits in Salesforce Maps Advanced

To reschedule missed visits during route optimization, specify how your reps log completed visits.

1. In the dataset wizard, from the Visit Object list, select the object that indicates that a scheduled visit is complete. This object can be the output (calendar) object or another object that has a lookup relationship with the routable object.
2. From the Lookup Field to Visited Object list, select the field that relates the object to the routable object.

3. From the Visit Date list, select the date or timestamp field that indicates when a visit was completed.
4. From the Assignment Field list, select the field that represents the user who completed the visit.

If you have multiple reps visiting the same account but with different visit frequencies, select Created by ID as your assignment field. When you select Created by ID, Salesforce Maps Advanced matches the rep with the visit plan that they're assigned to and applies their visit to the appropriate visit requirement.

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For example, suppose you have a sales rep and a merchandiser who visit the same accounts at different timeframes. You want the sales rep's visit to be counted towards sales visit targets, not merchandiser visit targets. To track visits by user, select Created by ID as your assignment field.

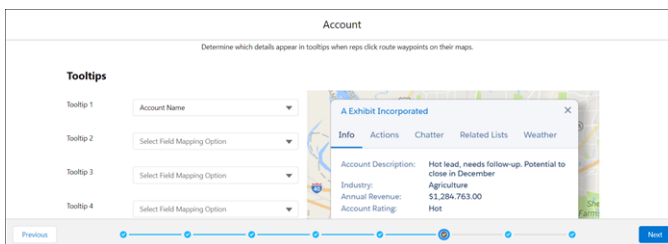
- Under Field Filters, add filter criteria to narrow down the records representing completed visits that you want to include in the dataset.  
For example, after reps log a visit, they create a task with a subject starting with "Check In At." So, you specify Task as the visit object. You have a Related To ID field that looks up to your routable object, so you specify Related To ID as your lookup field. Under Field Filters, you specify Subject contains *Check In At*.
- Click **Next**.  
Tooltip settings appear in the dataset wizard.

 **Example:** The custom output object for your visit plan is based on the Consumer Goods Cloud Visit object. When reps complete a visit, they set the Status to *Completed*. You include this criteria as a filter to ensure that these visits count towards visit targets when the rep generates routes.

### Show Waypoint Tooltips on Maps

When reps view their routes in Salesforce Maps Advanced, you can display additional information in waypoint tooltips. Waypoints are output records, such as visit records, that appear on reps' schedules and routes.

- In the dataset wizard, under Tooltips, select the routable object fields that you want reps to see when they interact with waypoints on their route maps.

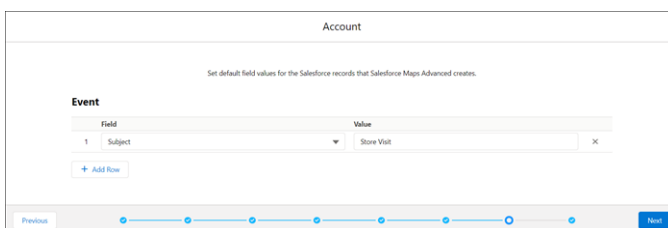


- Click **Next**.  
Default field values for output records appear in the dataset wizard.

### Specify Default Output Record Values

To create more comprehensive, detailed output records, specify default field values for the records that the visit plan creates in Salesforce Maps Advanced.

- In the dataset wizard, under Event, select the fields and corresponding values that you want output records to have by default after reps generate routes.



Field	Value
1 Subject	Store Visit

- Click **Next**.  
The object, field, and dates that represent promotional windows appear in the dataset wizard.

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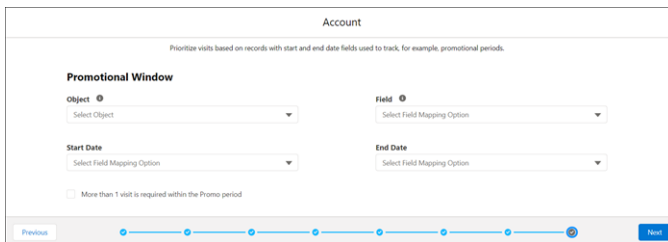
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 **Example:** The custom output object for your visit plan is based on the Consumer Goods Cloud Visit object. When reps generate routes, the output is visits. For output records, you specify the default value of Call Type to *Visit* and Status to *Planned*.

### Specify Promotional Periods

To support customer promotions in Salesforce Maps Advanced, prioritize visits to customers within a particular timeframe. This timeframe is in addition to the visit frequency requirements specified in the dataset. By default, one additional visit is scheduled to the customer location during the promotional window.

1. Confirm that your routable object, or an object that looks up to your routable object, contains fields that represent your promotion start and end dates. If you require more than one additional visit during the promotion, confirm that your object contains numeric fields that represent the minimum and maximum days between promotional visits.
2. In the dataset wizard, under Promotional Window, select the routable object that contains the start and end date fields that you want to use.



3. From the Field list, select the field that relates the promotional window object to the routable object. If you selected the routable object in the previous step, leave this field blank.
4. From the Start Date and End Date lists, select the fields that correspond to the promotional window start and end dates.
5. If you require two or more additional visits during the promotional window, select **More than 1 visit is required within the Promo period**.
  - a. Check that you have two numeric fields in the promotional window object that represent the minimum and maximum days between promotional visits.
  - b. Select those fields in Minimum Days Between Visits and Maximum Days Between Visits.
6. Click **Next**.  
Prioritize Data Sets appears in the visit plan wizard.

When reps generate routes, Salesforce Maps Advanced schedules additional visits within the promotional period. If the rep already met minimum days between visits or exceeded the visit target, the system still attempts to schedule a visit to the location within the promotional period dates.

### EDITIONS

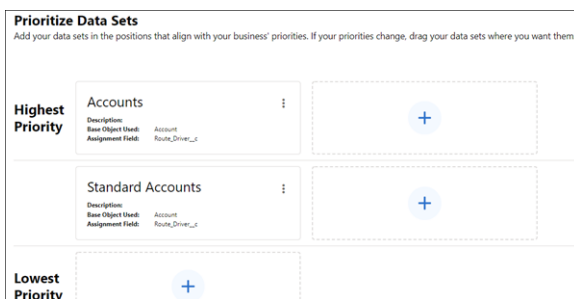
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## Prioritize Datasets in Salesforce Maps Advanced

You can prioritize certain customer visits over others, which increases the likelihood that they're scheduled sooner and reps meet visit targets earlier. For example, if you have accounts that have different visit targets than leads, create a separate dataset, and make it the highest priority.

1. Confirm that you've created at least two datasets in your visit plan. (You can clone an existing dataset by clicking the three vertical dots next to the dataset and selecting **Clone**.)
2. For each dataset, confirm that you've filtered records by a field that indicates priority. For example, you have a Tier field in your Retail Store routable object. You create three datasets, each with filter criteria that includes only records with Tier equal to 1, 2, or 3, respectively.
3. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Prioritize Data Sets**.
4. Drag datasets to the position that reflects the priority that you want. To make datasets equal in priority, put them in the same row.



5. Click **Next**.  
Assign Users appears in the visit plan wizard.

### SEE ALSO:

[Name Your Dataset and Select a Routable Object](#)

## Assign Users to Your Visit Plan

You can assign users or user profiles to a visit plan to generate routes for those users. After you save the visit plan, assigned users receive an email instructing them on how to generate routes in Salesforce Maps Advanced.

1. Confirm that your rep users are assigned the SF Maps and SF Maps Advanced permission sets.
2. Confirm that your rep users own one or more routable records as defined in the visit plan's datasets. For example, you've assigned a rep as account manager to at least one account record.
3. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Assign Users**.
4. On the Assign Users page, select the user profiles or individual users that you want to generate routes for.

### EDITIONS

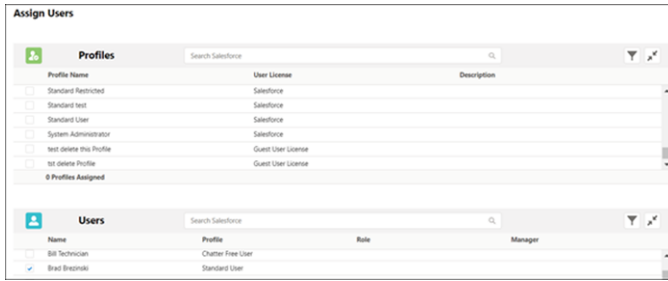
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5. Click **Next**. Visit plan settings appear in the visit plan wizard.

After you save the visit plan, assigned users, or users with a selected profile, receive an email directing them to Salesforce Maps Advanced to update their schedule and generate routes.

## Define Required Visit Plan Settings

In Salesforce Maps Advanced, set the route planning period and the number of routes to include when you generate routes. Also, specify how often to regenerate (optimize) routes during the planning period.

1. Confirm that you've enabled scheduled batches in Setup. If they're not enabled, then the optimization batches you specify in step 6 don't run, even when they're shown as enabled in your visit plan.
2. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Define Visit Plan Settings**.
3. On the Define Visit Plan Settings page, specify the start and end dates for this visit plan's timeframe. Your visit plan can span 3 months.

4. If you want the visit plan to generate routes for the same amount of time after the end date, select **Restart Visit Plan After its End Date**.

For example, your visit plan timeframe is 90 days. At the end of 90 days, the visit plan timeframe starts a new 90-day period. This 90-day rollover occurs until you deactivate the visit plan.

5. Under Number of Routes to Include in Optimizations, select the number of weeks or months worth of routes to generate during each optimization.

Salesforce recommends that this time value matches the visit plan duration.

For example, use this feature if you want your reps to see 2 weeks of routes, but your visit plan timeframe is for 3 months.

6. Schedule optimization batches to send and receive data to Salesforce Maps Advanced routing. At the frequency and time that you select, Salesforce Maps Advanced updates route and schedule data in your visit plan.

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

For example, you generated routes for your reps last Friday. On Monday, one of your reps decides to take off Tuesday and marks it on the schedule. Because you scheduled optimization batches to run every Monday, routes are automatically updated to move that rep's Tuesday visits to another day.

## 7. Click **Next**.

Additional Options appears in the visit plan wizard.

### SEE ALSO:

[Keep Salesforce Data up to Date](#)

## Specify Visit and Optimization Parameters

Tailor routes in Salesforce Maps Advanced when you prevent scheduling more than one visit during a shift and limit the length of shifts. Specify maximum drive time between stops, and choose your preferred speed to optimize non-batched routes. Keep in mind, as a by-product of these constraints, optimizations can be less efficient and deliver fewer routes to reps.

For example, if you specify a 10-minute drive time between stops, it can postpone other customer visits that fall outside that 10-minute drive.

1. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Set Additional Options**.
2. To help reps adhere to visit spacing requirements, ensure they visit customers one time during their shift. Set the option to prevent same shift visits, which is especially helpful for large volumes of accounts that require frequent visits.

For example, a customer requires daily visits, but the rep travels 2 days a week. This option schedules the rep to visit one time on each of those 2 days instead of scheduling multiple visits to that same customer on each of those 2 days.

3. To prevent reps or managers from scheduling themselves for more hours than allowed, enter the maximum hours they can schedule each day, including breaks.

For example, you want to set a time buffer that allows reps to complete their visits each day, but you also want to control their overtime. You set Maximum Shift Length to 10 hours. In another example, you want to ensure that part-time employees aren't scheduled for full days. You set Maximum Shift Length to 5 hours.

4. To reduce total travel time and promote clustering of visits, specify your recommended drive time in minutes. For example, your reps have customer locations spread throughout their territories and prefer to drive less between visits during the day. By setting a Preferred Maximum Drive Time Between Stops of 60 minutes, Salesforce Maps Advanced generates routes with customer visits close together, limiting drive time as much as possible.
5. To generate routes faster for non-batched optimizations, such as when a rep clicks **Plan My Visits** on the Maps Advanced Route tab, specify your preferred optimization time.

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Setting a maximum time can result in reduced route quality because Salesforce Maps Advanced has less time to find the most ideal routes.

6. Click **Next**.  
Confirm & Save appears in the visit plan wizard.

## Review and Save Your Visit Plan

After you specify all your visit plan requirements and settings, review and save your plan. After you save it, assigned users receive an email instructing them on how to generate routes in Salesforce Maps Advanced.

1. On the Maps Advanced Visit Plans tab, in the New Plan wizard, click **Confirm and Save**.
2. Review your visit requirements and settings. You can save your plan and come back later to specify more requirements.
3. If everything looks good, click **Confirm & Save**.  
A list of visit plans appears and your visit plan's status is set to Active. Salesforce Maps Advanced sends an email to each assigned user informing them of their assignment to the plan. The email includes a link to the Maps Advanced Route page so that reps can add personal schedule information such as their starting location and working hours. Reps must add this information before they can generate their routes.

If your visit plan's status is Needs Attention, edit your visit plan to include all required elements, such as a dataset, timeframe, and users.

If your visit plan's status is Deployed, it's active but its start date is in the future.

### SEE ALSO:

[Knowledge Article: Salesforce Maps Advanced Route Calendar](#)

## Fine-Tuning Your Routing Implementation

To streamline your business processes, refine your routing implementation after you set up Salesforce Maps Advanced and create a visit plan. For example, create predefined visit windows for chains and franchises and then share them with your reps to apply to their accounts.

### [Prevent Certain Events from Appearing on Schedules](#)

Reduce the noise and show only the things that matter when you schedule appointments in Salesforce Maps Advanced. Flag private and all-day events that you don't want to schedule.

### [Optimize Visits for the Future in Salesforce Maps Advanced](#)

After updating your active visit plan, push the changes to your reps' schedules on a future date to avoid disturbing their near-term visit schedule.

### [Create Shared Visit Windows for Individual Routable Object Records](#)

Help your sales reps save time and honor customers' visit windows by creating shared visit windows for chains and franchises. For example, as a sales and service operations manager, you create windows in Salesforce Maps Advanced that restrict visits to begin and end during certain time frames. Your reps apply those visit windows to the accounts that they sell to and serve.

### EDITIONS

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### Set Up Visit Window Selection for Specific Routable Object Records

Make it easy and intuitive for your reps to link a visit window to a customer by creating a lookup relationship and a menu option on the record page layout. If reps don't set visit windows at the record level, then Salesforce Maps Advanced uses the visit window in the visit plan when generating routes.

### Verify That Scheduled Batches Are Running

If you're unsure whether your Salesforce Maps Advanced data is being kept up to date through scheduled batches, check the status of the scheduled job in Setup.

### Track Route Optimization Status

As a manager, monitor the progress of your reps' route optimization by using the Maps Advanced Route Template User object. Verify the last time that your reps' routes were optimized in Salesforce Maps Advanced, and identify errors.

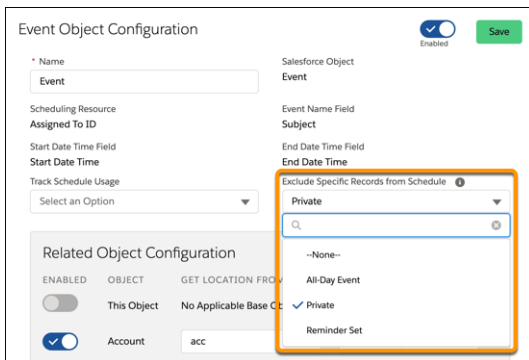
### Check Optimization Status in Your Calendar

As a rep, monitor the progress of your route optimization through your Salesforce Maps Advanced calendar. Check the last time that your routes were optimized and identify errors.

## Prevent Certain Events from Appearing on Schedules

Reduce the noise and show only the things that matter when you schedule appointments in Salesforce Maps Advanced. Flag private and all-day events that you don't want to schedule.

1. From Setup, in the Quick Find box, enter *Installed Packages*, and then select **Installed Packages**.
2. Next to the Salesforce Maps package, click **Configure**.
3. Under Maps, select **Routes & Schedule**, and then click **Event**.
4. On the Event Object Configuration page, from Exclude Specific Records from Schedule, select the types of events that you want to omit from appearing on schedules. For example, a private event.



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To customize settings:

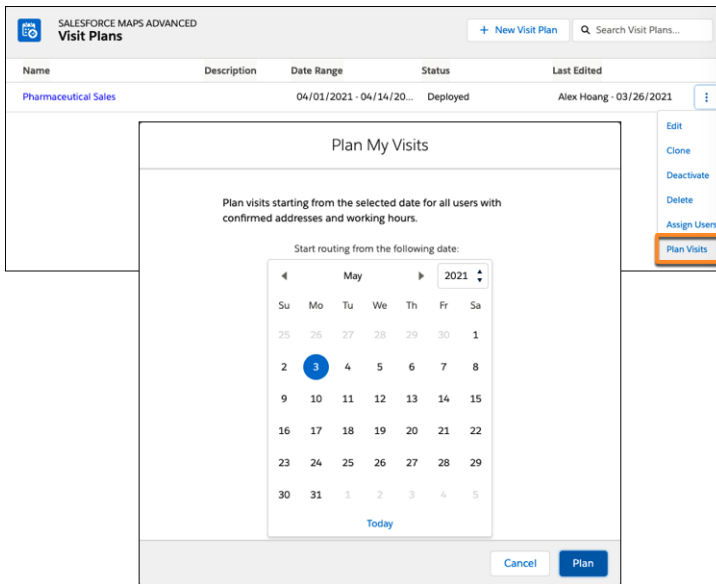
- Customize Application


## Optimize Visits for the Future in Salesforce Maps Advanced

After updating your active visit plan, push the changes to your reps' schedules on a future date to avoid disturbing their near-term visit schedule.

When you optimize your reps' schedules, Salesforce Maps Advanced creates another visit on a future date for an incomplete past visit.

1. From the App Launcher, find and select **Maps Advanced Visit Plans**.
2. On the Visit Plans page, edit an active visit plan, then save it.
3. On the Visit Plans page, next to the active visit plan, select **Plan Visits**.
4. In Plan My Visits, select the date in the future when you want to apply your visit plan changes to your reps' calendars, and then click **Plan**.



 **Example:** You update a visit window for a quarterly visit plan for your pharmaceutical reps. You want to update your reps' schedules but you don't want to disrupt this week's schedule. In Plan My Visits, you select next Monday. After you click **Plan**, you regenerate (optimize) routes now, but only update reps' schedules for next Monday and beyond.

## Create Shared Visit Windows for Individual Routable Object Records

Help your sales reps save time and honor customers' visit windows by creating shared visit windows for chains and franchises. For example, as a sales and service operations manager, you create windows in Salesforce Maps Advanced that restrict visits to begin and end during certain time frames. Your reps apply those visit windows to the accounts that they sell to and serve.

1. From the App Launcher, find and select **Maps Advanced Shared Visit Windows**.
2. Under Default Visit Windows, name and specify your shared visit window time frame. For example, you create a shared visit window for all Tossed Greens restaurant franchise locations. The franchises prefer visits that begin and end on weekdays between 9:00 AM to 11:00 AM or 2:00 PM to 5:00 PM.

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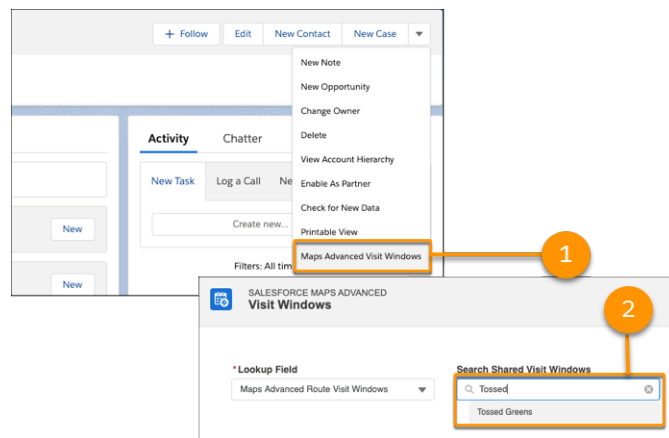
Available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

**\* Name Visit Window**  
 Tossed Greens Window Visits

On:  
 1st Week  2nd Week  3rd Week  4th Week

Day	Visit Window 1	Visit Window 2	
SUNDAY	+ Add Visit Window		Apply to all days
MONDAY	From: 9:00 AM To: 11:00 AM	From: 2:00 PM To: 5:00 PM	Apply to all days
TUESDAY	From: 9:00 AM To: 11:00 AM	From: 2:00 PM To: 5:00 PM	Apply to all days
WEDNESDAY	From: 9:00 AM To: 11:00 AM	From: 2:00 PM To: 5:00 PM	Apply to all days
THURSDAY	From: 9:00 AM To: 11:00 AM	From: 2:00 PM To: 5:00 PM	Apply to all days
FRIDAY	From: 9:00 AM To: 11:00 AM	From: 2:00 PM To: 5:00 PM	Apply to all days
SATURDAY	+ Add Visit Window		Apply to all days

3. Save your work.
4. To make it easy for your reps to select a shared visit window from an account record, create a lookup relationship with visit windows. Then create a custom menu option on the routable object and add it to the record page layout. For example, an account record has a custom menu option named Maps Advanced Visit Window (1). When the rep selects the option, shared visit windows appear. The rep selects a visit window to link to the account record (2).



SEE ALSO:

- [Set Up Visit Window Selection for Specific Routable Object Records](#)
- [Days Between Visits](#)

## Set Up Visit Window Selection for Specific Routable Object Records

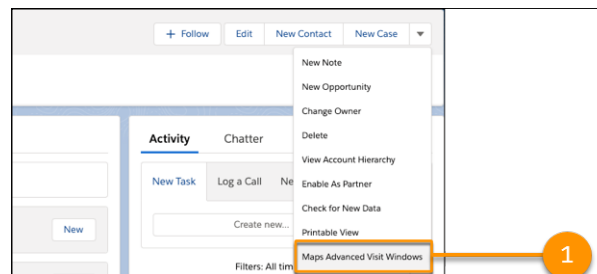
Make it easy and intuitive for your reps to link a visit window to a customer by creating a lookup relationship and a menu option on the record page layout. If reps don't set visit windows at the record level, then Salesforce Maps Advanced uses the visit window in the visit plan when generating routes.

**Tip:** If the same visit window applies to more than one customer location, consider creating a shared visit window.

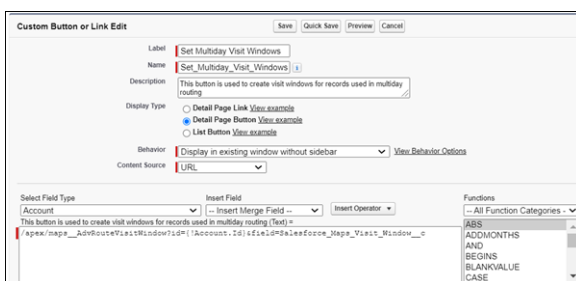
1. From Setup, in the Quick Find box, enter *object*, and then select **Object Manager**.
2. Select the routable object that you want to link visit windows to. For example, the Account object.
3. Select **Fields & Relationships**, and then click **New**.
4. On the New Custom Field page, under Data Type, select **Lookup Relationship** and click **Next**.
5. From the Related To list, select **Maps Advanced Route Visit Windows** and click **Next**.
6. On the New Relationship page, specify the custom field label and field name, and then click **Next**.
7. Configure field-level security and other settings, and then save your work.
8. To create another lookup custom field for a customer location with more than one visit window, repeat steps 1 through 7. For example, if sales reps and merchandisers visit the same customer location at different times, use two lookup custom fields to represent each visit window.

Next you create a custom menu option on the record page layout. Reps select this menu option to link a visit window to a customer location, such as an account.

For example, on a franchise account record, the rep selects a custom menu option to specify a visit window for that franchise location (1).



9. In Object Manager, for the same routable object as in step 1, select **Buttons, Links, and Actions**, and then click **New Button or Link**.



10. For Display Type, select **Detail Page Button**.

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To customize settings:

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- For Behavior, select **Display in existing window without sidebar**.
- For Content Source, select **URL**.
- In the URL box, paste this code and then replace the bracketed text with the appropriate values.

```
/apex/maps__AdvRouteVisitWindow?id=[Routable Object Record Id]&field=[API Name of the Maps Advanced Route Visit Windows lookup field]
```

For example, your routable object is Retail Store, and the API name of your custom lookup field is Maps\_Advanced\_Route\_Visit\_Windows\_\_c. The code in the URL box is:

```
/apex/maps__AdvRouteVisitWindow?id={!RetailStore.Id}&field=Salesforce_Maps_Visit_Window__c
```

- Check your syntax and save your work.
- Add your custom menu option, also known as a custom button, to your routable object record page layout. Then your reps can see and use it on a record detail page to add visit windows.

#### SEE ALSO:

- [Create Shared Visit Windows for Individual Routable Object Records](#)
- [Salesforce Help: Define Custom Buttons and Links](#)
- [Salesforce Help: Page Layouts](#)
- [Days Between Visits](#)

## Verify That Scheduled Batches Are Running

If you're unsure whether your Salesforce Maps Advanced data is being kept up to date through scheduled batches, check the status of the scheduled job in Setup.

- From Setup, in the Quick Find box, enter *Jobs*, and then select **Scheduled Jobs**.
- Navigate to the Advanced Route Reoptimization Template Batch job and identify when the job started and is scheduled to run next. About every hour, the product checks to see if there are any visit plans with route optimization scheduled. If there are, the batch job runs and updates route and schedule data in those visit plans.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type
Del	Advanced Route Debug Log Deletion Batch	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 5:00 AM	12/01/2022 5:00 AM	Scheduled Apex
Del	Advanced Route Reoptimization Template Batch	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 6:00 AM	11/01/2022 7:00 AM	Scheduled Apex
Del	Advanced Route Stalled Routing Batch Check	Smith, Alan	7/01/2022 7:51 AM	11/01/2022 6:00 AM	11/01/2022 7:00 AM	Scheduled Apex

- Warning:** If you delete the Advanced Route Reoptimization Template Batch job, you disable scheduled batches for all visit plans.

#### SEE ALSO:

- [Keep Salesforce Data up to Date](#)

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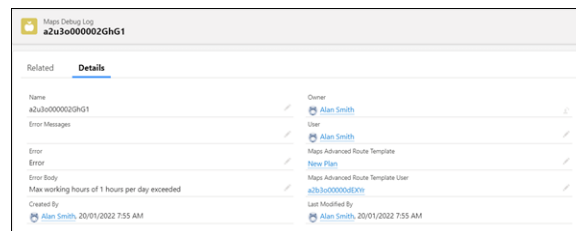
## Track Route Optimization Status

As a manager, monitor the progress of your reps' route optimization by using the Maps Advanced Route Template User object. Verify the last time that your reps' routes were optimized in Salesforce Maps Advanced, and identify errors.

You can create reports and list views from the Maps Advanced Route Template User object. Use these high-level steps to create a central view of all users' route optimizations still in progress.

1. In Setup, create a custom object tab based on the Maps Advanced Route Template User object.
2. From the App Launcher, find and select your new Maps Advanced Route Template User tab.
3. On the tab, name and enter a new list view to show the route optimization progress. For example, *Routes in Progress*.
  - a. Select the fields that you want to show and the sort order. For example, you can show the Maps Advanced Route Template User Name, User, Current Processing Status Bulk, Job Submitted At, and other fields.
  - b. Filter the list view as follows: Current Processing Status Bulk not equal to Available for Submission.
  - c. Save your work.

To troubleshoot errors, use the debug logs. From the App Launcher, find and select **Maps Debug Logs**. For example, this debug log shows an optimization error that the rep saw in his calendar view.



Maps Debug Log	
azu3o00002ghG1	
Related	Details
Name	azu3o00002ghG1
Error Message	Map Advanced Route Template
Error	New Plan
Error Body	Max working hours of 1 hours per day exceeded
Created By	Alan Smith, 20/01/2022 7:55 AM
Owner	Alan Smith
User	Alan Smith
Maps Advanced Route Template	Map Advanced Route Template User
Last Modified By	Alan Smith, 20/01/2022 7:55 AM

You can create reports and list views based on the Maps Debug Log object.

SEE ALSO:

[Salesforce Help: Create Lightning Page Tabs](#)

## Check Optimization Status in Your Calendar

As a rep, monitor the progress of your route optimization through your Salesforce Maps Advanced calendar. Check the last time that your routes were optimized and identify errors.

1. From the App Launcher, find and select your Maps Advanced Route tab.
2. Above the calendar, note when your optimization last ran and whether any errors occurred.

### EDITIONS

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### USER PERMISSIONS

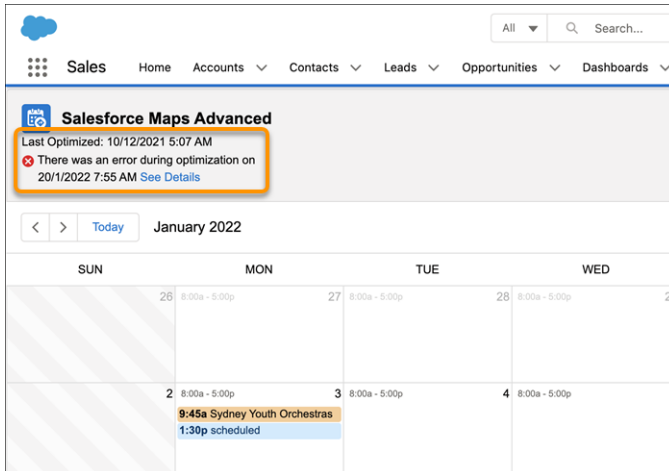
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SEE ALSO:

[Knowledge Article: Salesforce Maps Advanced Route Calendar](#)

## Best Practices for Routing Success

As you implement Salesforce Maps Advanced, observe these best practices.

### [Rollout Guidelines](#)

Plan for your Salesforce Maps Advanced implementation and rollout. The better you prepare, the better your reps are able to meet with more customers in less time.

### [Data Quality Guidelines](#)

To ensure that sales and service reps get the best routes to make their trips efficient, use the best quality data in Salesforce Maps Advanced.

## Rollout Guidelines

Plan for your Salesforce Maps Advanced implementation and rollout. The better you prepare, the better your reps are able to meet with more customers in less time.

### Implementation Strategy

Because Salesforce Maps Advanced requires numerous configurations, consider appointing a dedicated project manager for your implementation.

- To verify your use case requirements, refer to the pre-implementation checklists in [Sample Scenarios for Salesforce Maps Advanced Routing](#).
- To gather the objects, fields, and business logic for visit plans, use the visit plan checklist in [Create Visit Plans](#).

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## Testing Strategy

Achieve a successful rollout and increase rep adoption by establishing a testing strategy. Test your product features before you release them to your teams. For example:

- Practice running route optimizations in a sandbox.
- Start small and plan visits for one rep who owns a defined set of records. Then identify configuration or user issues in the error log. Repeat the process for other users, then create visit plans for your teams.

### SEE ALSO:

[Preparing for Routing Automation](#)

[Creating Visit Plans](#)

## Data Quality Guidelines

To ensure that sales and service reps get the best routes to make their trips efficient, use the best quality data in Salesforce Maps Advanced.

Route optimizations perform best when your Salesforce data includes balanced territories and record assignments. Algorithms drive the optimization process by using multiple data points so that your reps visit more customers and drive fewer miles.

To ensure...	It's best that you...
Balanced territories	<p>Investigate your territories in Salesforce and the balance of reps in each. Adjust record assignments to distribute work efficiently. Imbalanced record assignments can result in too many visit requirements for some reps and too few for others.</p> <p>Salesforce offers ways for you to create balanced territories and assignments.</p> <p><b>Territory Planning</b> Create balanced, strategic territories that ensure the best coverage by your sales and service reps. Then publish your territories and rep assignments to Salesforce Maps or to Enterprise Territory Management.</p> <p><b>Enterprise Territory Management</b> Create territory structures and strategies when you build a model, and then add account assignment rules. Assign users and accounts, and then run reports to assess your model's impact.</p>
Data quality	<ul style="list-style-type: none"> <li>• Confirm record assignments for all records or related records that you want to include in visit plans. Route optimizations exclude any records that are missing rep assignments.</li> <li>• Encourage your reps to always check in when they arrive at visits and to mark visits as done when they leave. If they don't do so, those visits</li> </ul>

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To ensure...	It's best that you...
	can reappear on reps' schedules and give managers an inaccurate read on team performance.

SEE ALSO:

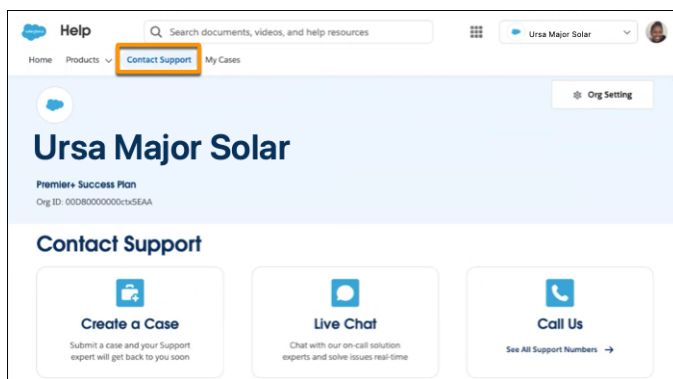
[Salesforce Help: Designing Strategic Territories](#)

[Salesforce Help: Enterprise Territory Management](#)

## Get Technical Support for the Salesforce Maps Portfolio

Remove roadblocks and reduce downtime when you route your requests directly to support engineers who specialize in Salesforce Maps, Salesforce Maps Advanced, and Territory Planning.

1. Log in to [Salesforce Help](#), and then click **Contact Support**.



2. Click **Create a Case**.
3. Select the product **Sales**, and then select the topic **Salesforce Maps**. Enter information in the required fields, and then submit your case.

 A screenshot of the 'Create a Case' form. The form has a title 'Create a Case' and a sub-header 'For faster help, don't forget to grant login access for Support. Click here for more help on how to submit a case.' The 'Product' dropdown is set to 'Sales' and the 'Topic' dropdown is set to 'Salesforce maps', both highlighted with an orange box. Below these are fields for 'Org ID or MID' (with the value '000800000000ct5EAA') and 'Instance Type' (set to 'Production').

A Salesforce Maps support engineer reviews your details then contacts you.

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