Mapping Guide

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Mapping

To geographically locate prospects and constituents on an interactive map, you can use the integrated mapping functionality, powered by Microsoft *Bing Maps*.

On the Mapping page, you can access the mapping tool and begin to create maps with the addresses stored in your database. For example, you can enter criteria to locate a group of constituents in a specific area. In addition, you can navigate to specific records in your database from mapped locations. To access the Mapping page from *Constituents*, click **Constituent map**. To access the Mapping page from *Prospects*, click **Mapping**.

To indicate a location on the map, you can add a pushpin or map entity. After you add pushpins or entities, you can create route directions between multiple locations or perform a radius search to find known addresses within a specific distance from a location.

To help keep track of mapped records, you can create static output queries for either the full set of mapped records or a subset of records. The queries appear on the Query page and can be used with other functions, such as *Analysis*, or to create additional maps.

Mapping Page

You can access the Mapping page from various locations in the system, including *Prospects*, *Constituents*, the Wealth & Ratings page, and the Members tab of a Research Group record.

> *Note:* To map an address, you must have mapping credentials entered. The system administrator enters the credentials for the Mapping functionality through the **Mapping** configuration task in *Administration*

From the Mapping page, you can use multiple tools to find locations and add and save mapped entities. When you map locations and view records on the interactive map, you can also use interactive tools to navigate the map, change views, mark locations, and view driving directions.

Mapping Tools

From the Mapping page, you can use multiple tools to find locations and add and save mapped entities. For information about how to access the Mapping page, see Mapping Page on page 1.

Screen Item	Description
Enter business name or category	To find the location of an organization on the map, enter the name or category of the business and click **Search**.
Enter city, address or landmark	To find the location of a city, specific address, or landmark on the map, enter the name or address of the location and click **Search**.
Add	To add an entity to the map, click this button and select the type of entity to add. For information about how to add an entity, see Add Map Entities on page 4.
Open a saved map instance	To open a previously saved map instance, click this button. The Map Instance Search screen appears so you can select the map to open. For information about map instances, see Map Instances on page 8.
Save	To save an instance of the map, click this button. For information about how to save map instances, see Save an Instance of a Map on page 5. You can also select to save a group of mapped records as a research group or selection. For information about how to save mapped records, see Save Mapped Constituents on page 6.
Print	To print a copy of the map, click this button. If you map a route between multiple locations, you can select to print directions for the route.
Refresh map	To refresh the map and remove all added entities, click this button.
Pushpins tab	This tab displays name and address information associated with any pushpins included on the map. Using the **Sort by** field, you can sort records by name, state, and post code.
Groups tab	This tab displays information about all groups associated with any pushpins included on the map, including total number of records and the total number of mapped records. Using the **Sort by** field, you can sort records by name and number of records.

Mapping Interactions

When you map locations and view records on the interactive map, you can use these tools to navigate the map, change views, mark locations, and view driving directions.

Screen Item	Description
Directional arrows	Click the directional arrows to pan in any direction.
Zoom	Click the magnifying glass icons to zoom in and out from the map.
Map views	Select how to display the map: **Road**, **Aerial**, and **Bird's eye**.
Labels	Click this button to hide the labels on the map.
Add pushpin	To indicate a location with a pushpin, right-click at the location and select **Add pushpin**. For information about how to add a pushpin, see Manage Pushpins on page 4.
Center map here	To center the map around a location, right-click at the location and select **Center map here**.
Start route and **End route**	To create driving directions between two locations on the map, hover your cursor over each location and select whether it is the start or end point. For information about how to create driving directions, see Create Route Directions Between Two Entities on page 7.
Radius search	You can create a radius on the map to locate addresses from your database within a specific distance from a location. To create a radius around a location, hover your cursor over a pushpin or map entity at the location and select **Radius search**. For information about how to perform a radius search, see Radius Search on page 7.

Constituent Density Map

On the Constituent Density Map page, you can view a heat map of selected constituent addresses, such as to determine the ideal location for an event or a marketing effort. To access the Constituent Density Map page, from *Marketing and Communications*, click **Constituent density map**.

On the heat map, you can view the density of multiple constituent selections at one time. To add a constituent selection to the map, click **Add** on the action bar and search for the selection. The map indicates, by color, areas on the map more heavily represented by addresses in the selections. If a constituent appears in multiple selections on the map, the program counts the constituent only one time in the density.

Address Geocodes

Before an address can be mapped, it must have a geocode. You can assign geocodes when you create new records or import records into the system. For existing records, we recommend you use the global change functionality to assign geocodes.

▶ **Add address geocodes**

1. From *Administration*, click **Global changes**. The Global Changes page appears.

2. Click **Add**. The Add Global Change Instance screen appears.

3. Select **Address Geocode** and click **OK**. The Add global change screen appears.

4. Enter a unique name and selection for the global change. If necessary, click the binoculars to locate an existing selection of records.

5. In the **Site** field, select the site that you want to use to secure this global change instance. This field contains only sites to which you have rights.

   When you select a site and save the process:

   • Only users with access to the selected site can run the global change process.

   • Other users cannot edit the **Site** entry. The system administrator or the user who created the process can edit the **Site**.

   • The site automatically appears in the **Site** field on the Assign Permissions screen (only system administrators and the process owner can access this screen).

   • On the Global Change page, an **Owner** column displays, so you can see who created the process.

6. Select whether to process only primary addresses in the global change.

7. Click **Save**. You return to the Global Changes page.

8. To process the records, select the global change you created and click **Process global change**.

Map Entities

From the Mapping page, you can add entities such as constituents and selections to the map. After you add entities, you can save the map instance for future use. You can also save the mapped entities as a research group or selection or create route directions between two entities.

Add Map Entities

From the Mapping page, you can add addresses of constituents, research groups, and selections as entities. After you add entities, you can save the map of their locations for future use.

> *Tip:* Before you can map an address, it must be assigned a geocode. You can assign geocodes when you create new records or import records into the database. For existing records, we recommend you use the Address Geocode global change process to assign geocodes

▶ **Add a map entity**

1. On the Mapping page, click **Add** on the action bar and select the type of entity to add, such as **Constituent** or **Selection**. A search screen appears.

2. Search for and select the record to add. You return to the Mapping page.

    On the map, an indicator appears at the location of the selected address. To view address information about the entity, hover your cursor over the indicator.

3. To further identify the location, right-click on the indicator and select **Add pushpin**. For information about how to add a pushpin, see Manage Pushpins on page 4.

4. To center the map around the location, right-click on the indicator and select **Center map here**.

5. To change views and navigate the map, use the mapping tools on the action bar. For information about these tools, see Mapping Tools on page 1.
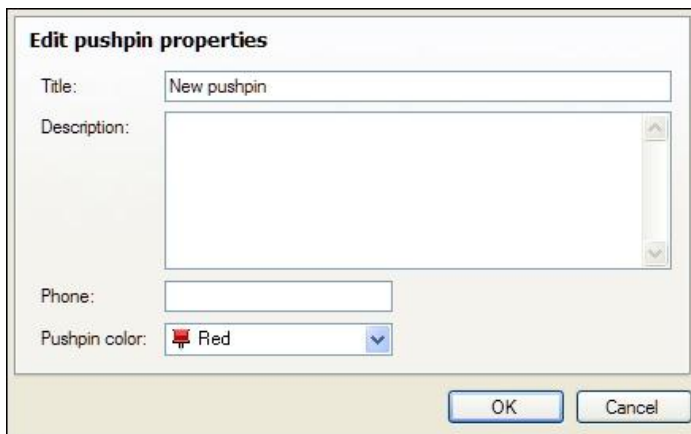
Manage Pushpins

To indicate a location on the map, you can add a pushpin. When you add a pushpin, you can select its color, such as to help differentiate multiple types of locations or entities.

▶ **Add or edit a pushpin**

1. On the Mapping page, select the location of the pushpin.

    • To add a pushpin, right-click on the location to indicate with the pushpin and select **Add pushpin**.

    • To edit the properties of an existing pushpin, hover your cursor over the pushpin and select **Edit pushpin properties**.

    The Edit pushpin properties screen appears.

2. Enter a unique title and description to help identify the location.

3. In the **Phone** field, enter the phone number for the location.

4. Select the color to assign the pushpin.

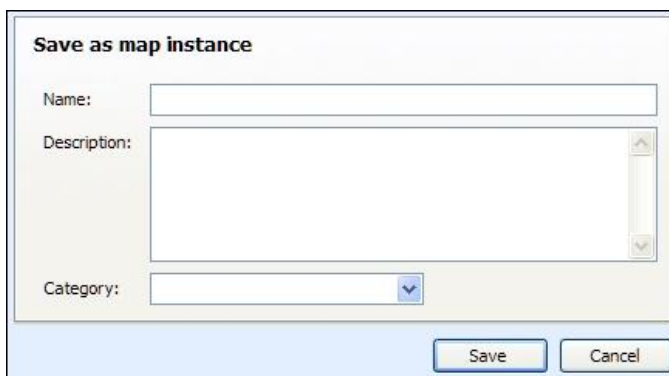5. Click **OK**. You return to the Mapping page.

Save an Instance of a Map

You can save a copy of the map for later use, such as after you add multiple entities or pushpins.

After you save a map instance, you can manage it from the Map instance page. For information about this page, see Map Instances on page 8.

▶ **Save a map instance**

1. On the Mapping page, click **Save** on the action bar. The Save as map instance screen appears.

2. Enter a unique name and description to help identify the map instance.

3. To group the map with other similar maps, in the **Category** field, select the category of the map. Your system administrator configures the available categories.

4. Click **Save**. You return to the Mapping page.

Save Mapped Constituents

When you map multiple constituents, you can save the records as a selection or research group.

▶ **Save records as a research group**

1. On the Mapping page, click **Save** on the action bar and select **Save to research group**. The Add constituents to screen appears.
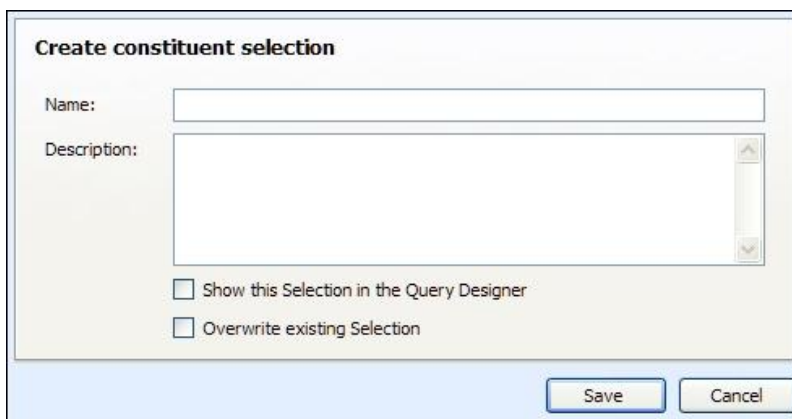

2. Select whether to save the records to a new research group or an existing research group.

   • To create a new research group, select **New research group** and enter a unique name and description to help identify the group.

   • To add the records to an existing group, select **Existing research group** and search for the group to add the records to.

3. Click **Save**. You return to the Mapping page.

▶ **Save records as a selection**

1. On the Mapping page, click **Save** on the action bar and select **Save to selection**. The Create constituent selection screen appears.

2. Enter a unique name and description to help identify the selection.

3. Select whether to display the selection in the Query Designer.

4. To overwrite an existing selection with the same name, select **Overwrite existing Selection**.

5. Click **Save**. You return to the Mapping page.

Create Route Directions Between Two Entities

To create the route directions between two locations on a map, you can use the **Start route** and **End route** functionality accessed from mapped entities and pushpins. On the Mapping page, hover your cursor over the origination location and select **Start route**. Then, hover your cursor over the destination and select **End route**. On the map, the route appears between the two locations. Under **Directions**, the driving directions for the route appear. You can print, reverse, and clear the directions as necessary.

Radius Search

From a pushpin, you can create a radius around a location to locate addresses from your database within a specific distance from the location.

Note: From *Administration*, you can configure whether distance within a radius search appears in miles or kilometers.

Before you can perform a radius search, you must first mark the location to use as the center of the radius. For information about how to add a pushpin or map entity at the location, see Manage Pushpins on page 4 or Add Map Entities on page 4.

▶ **Create a radius search on a regular constituent map**

1. Hover your cursor over the pushpin or entity to use as the center of the radius and select **Radius search**. The Select radius screen appears.
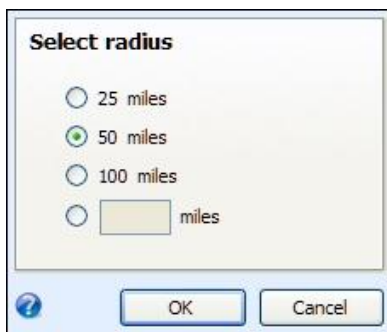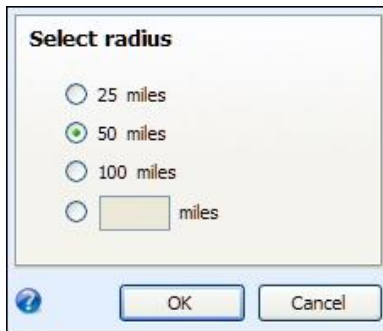

2. Select the distance from around the pushpin to include in the search. For example, to locate all known addresses within 50 miles of the pushpin location, select **50 miles**.

3. Click **OK**. You return to the Mapping page. On the map, the records that exist within the radius appear as map entities.

   Note: To remove the radius, hover over the radius circle and click **Remove radius**.

▶ **Create a radius search on a density map**

1. Hover your cursor over the pushpin or entity to use as the center of the radius and select **Radius search**. The Select radius screen appears.

2. Select the distance from around the pushpin to include in the search. For example, to locate all known addresses within 50 miles of the pushpin location, select **50 miles**.

3. Click **OK**. You return to the Mapping page.

4. To create a selection of records included in this radius search, hover your cursor over the pushpin to which you just added the radius. Select **Save records contained within radius**. A screen appears allowing you to name and save a selection of all records located in the defined radius. Select **Show this Selection in Query Designer** if you want to access this selection from the Query functionality.

> *Note:* To remove the radius, hover over the radius circle and click **Remove radius**.

Map Instances

From the Map instances page, you can manage the maps you have saved. To access the Map instances page from the Mapping page, click **Manage map instances** under **Tasks**.
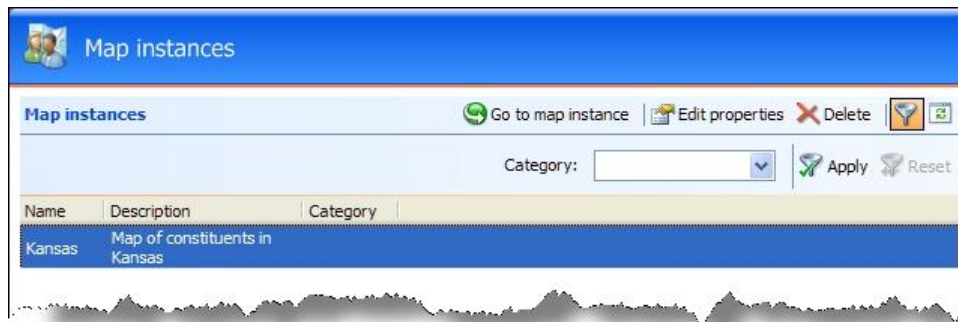
Under **Map instances**, the saved maps appear. To help find a specific map instance, you can filter the grid by map category. To filter the grid, click **Filter** on the action bar, select the category of maps to view, and click **Apply**. To remove the filter and display all map instances, click **Reset**.

View a Map Instance

On the Map instances page, your saved map instances appear.

To open a map instance from the Mapping page, click **Open a saved map instance** on the action bar. A search screen appears so you can search for and select the map to open.

Edit the Properties of a Map Instance

After you save a map instance, you can edit its properties, such as name, description, or category, as necessary.

▶ **Edit map instance properties**

1. On the Mapping page, click **Manage map instances** under **Tasks**. The Map instances page appears.

2. Under **Map instances**, select the map with the properties to edit.

3. On the action bar, click **Edit properties**. The Edit map instance properties screen appears. The items on this screen are the same as the Save as map instance screen. For information about the items on this screen, see Save an Instance of a Map on page 5.

4. Edit the information as necessary.

5. Click **Save**. You return to the Map instances page.

Delete a Map Instance

You can delete a saved map instance from the Map instances page, such as when you no longer need it. To delete an instance, select it under **Map instances** and click **Delete** on the action bar. When a message appears to ask whether to delete the map instance, click **Yes**. You return to the Map instances page.

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