

KAG Insightly Geocoding CRM App Quick Reference

v.2020-01-19 by Menno Bos



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1. Why the KAG Insightly Geocoding app?

The geocoding app was primarily created to “see” where the KAG (potential) customers are located, where “blank” areas were, and to plan visits in a geographical area (even by product group etc.).

The app can be used both on PC desktops as on mobile devices. Google Chrome is the platform for which the app is mainly developed and tested on, however is cross-browser compatible. It features QR code generation. QR scanner apps for both Android or iOS will work, important is that they allow easy redirection to make a phone call. And in case of Organisation location, open a Google Map to navigate (I use the “QR Code Scanner” from TinyLab on iOS and the “QR Code Reader” from TWMobile on Android).

In time ... by adding other features, this app has more-and-more evolved into a contact productivity tool, with features like: QR code generation, modifying Organizations & Contacts Tags, Notes were added.

Future versions, will (probably) have more Organization & Contact, Tasks, Links tc. editing options.

2. Start the app

In your browser go to the website url: <https://www.kag-crm.com>

And the app will start up.

Option: add the app to your mobile device “Home Screen” (see chapter 7)

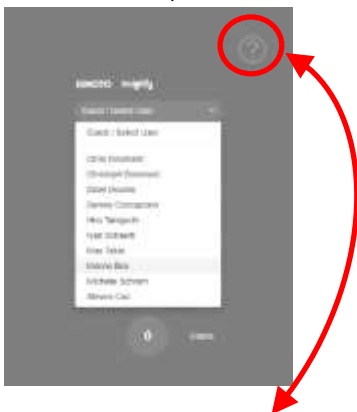
3. login

Logging into the app can go via a few options:

- A. as “guest”: just type in the obtained 4-digit pincode: “****”.



- B. as an “individual user”, with read and/or write rights (depending on Insightly rights), and individual pincode. And when possible, create individual text blocks, email creation (after Gmail log in), Tasks, Notes, etc. This is not implemented yet.



- C. right-top corner “?” Link icon to the latest version of this quick reference.

4. Select Organisations



Controls

A, B, C, D - "Selection of Organizations":

- can be a 1, 2 or 3 step selection, i.e.
 - step 1: Selection by "Country" (A)
 - step 2: Selection by "Sales Cycle" Tags (B)
 - step 3.1: Selection by "Product", "Industries/Applications" and "Organization Type" Tags (C1, C2, C3) or (D)
 - step 3.2: Selection by "Product", "Industries/Applications" and "Organization Type" Tags (D). This is a "multiple-select-search" box, which contains **ALL** Insightly crm system Tags. Does basically the same as C1, C2 and C3 combined.

- by “Direct Contact or Organization selection” “E” or “F” These are “multiple-select-search” boxes. Searching and selecting multiples is possible.

Selection by Tags

A Tags:

at least 1 or more Countries (or by “All” link) **must** be selected, exception is when selecting by D, E Tags, i.e. “direct Contact or Organization selection”.

B Tags:

after selecting “Country” Tags, 1 or more “Sales Cycle” Tags **can** be selected, when not: all “Sales Cycle” Tags, of the Organizations containing those Tags in the selected Country, will be selected.

C, D Tags:

after “Country” and “Sales Cycle” Tags, all “other Tags” **can** be selected. Only Tags selected, will select Organizations, containing those Tags.

E, F Search-select boxes

No Tags, when selecting 1 or more Contacts or Organisations, all other selected Tags will be cleared.

Selection/filtering schemes:

selecting by 1 step:

by “Country” “A” and no “other” Tags:

A (rest not selected)

selecting by 1 step:

by “Contacts” “E” or “Organization” “F” search-select boxes, and no “other” Tags:

E OR F (rest not selected)

selecting by 2 steps:

by “Country” “A” and “Sales Cycle” Tags “B” and no other Tags, “C” or “D”:

A AND B (rest not selected)

selecting by 2 steps:

by “Country”, “A” and 1 or more “other” Tags, “C” or “D”:

A AND (C1 OR C2 OR C3 OR just D) (rest not selected)

selecting by all 3 steps:

by “Country” “A” and “Sales Cycle” Tags “B” and 1 or more “other” Tags, “C” or “D”:

A AND B AND (C1 OR C2 OR C3 OR just D) (rest not selected)

- after the selection, click on “GoTo Map” to see the result on a Google Map.
- Selections can be reset by the “Reset” button “G”

E, F - “Direct “Contact / Organization” selection”:

- 1 or more Contacts / Organization can be search and selected, when present. Searching by Contact name / Organization name. Multiples are possible, like searching a company and its subsidiaries (e.g. searching on “fuji” gives all “Fuji” Organizations).

G - “Buttons to”:

- “Update”, to update the server file (used to reduce app start-up time. After a day you can best refresh your browser page, as the server file can be outdated.
- “Reset”, reset all Tags and fields.

- “GoTo Map”, after selection, “clicking”/”tapping” this button takes the selection to a Google Map.

H - “info”

- gives Insightly and app statistics.

I - Sales Cycle colours tick-box”

- when “ticked”, displays all Markers in “Sales Cycle” colours.

J - “info”

- gives an explanation of the “Sales Cycle” implementation of the KAG Insightly crm.

K - “info”

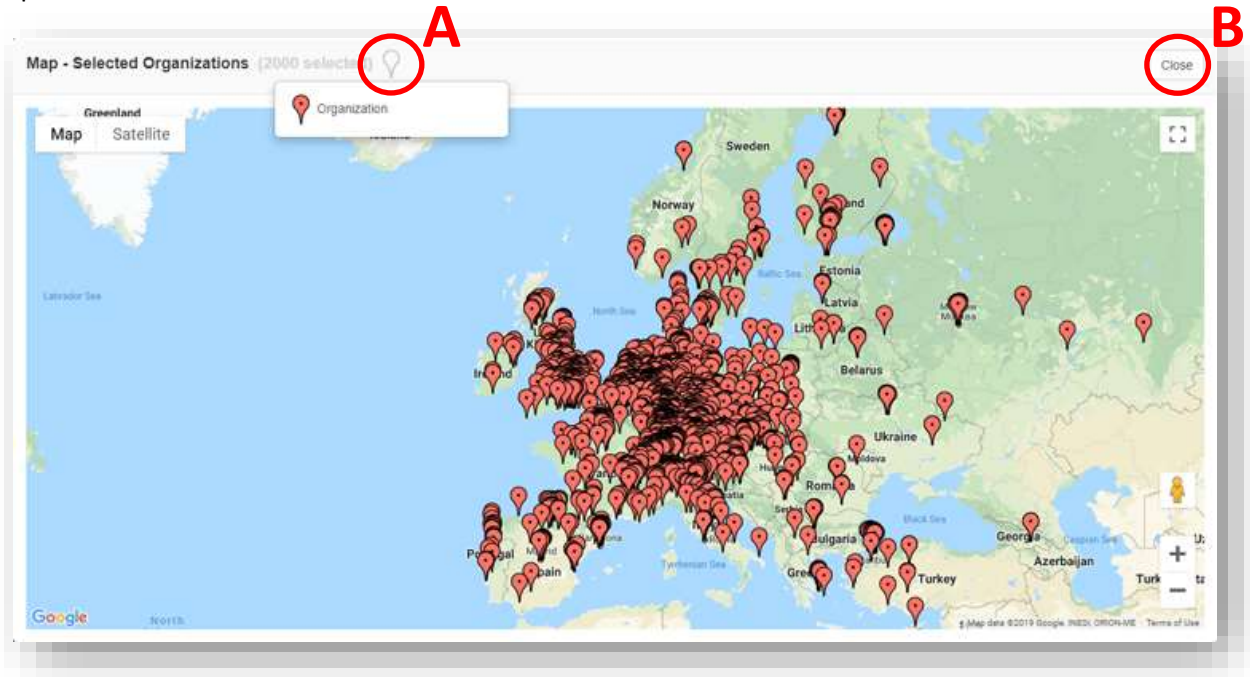
- gives information on how-to-use the “Other” Tags selection.

L - “user setup”

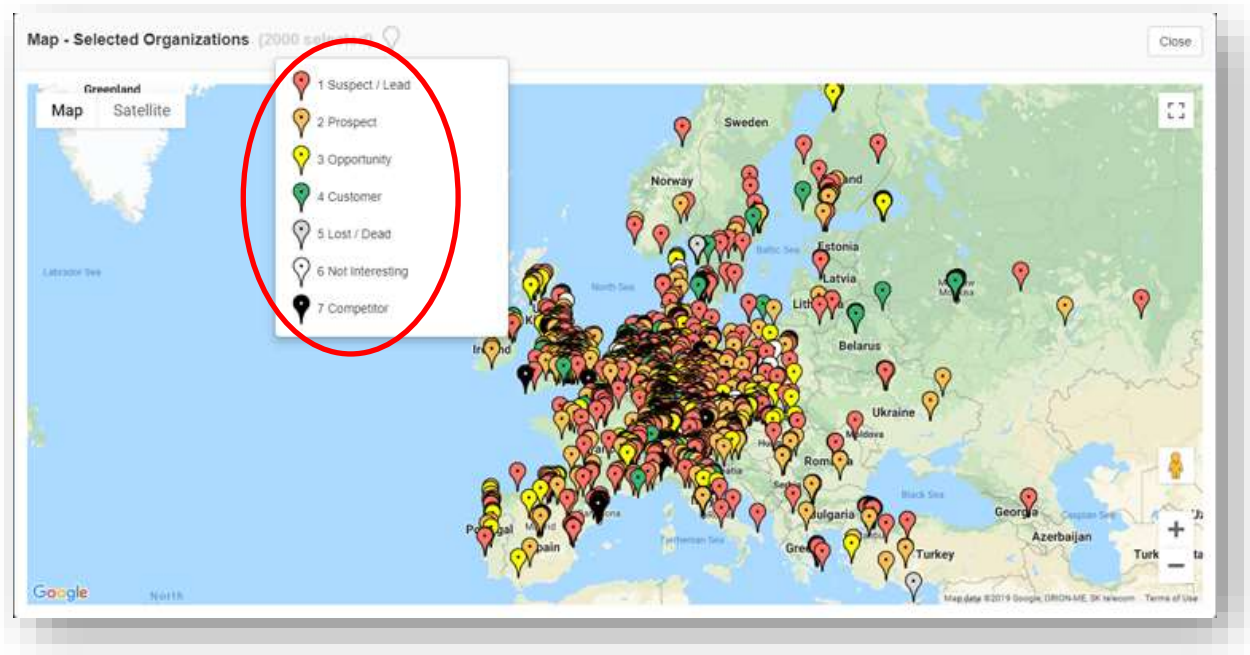
- Perhaps in future version, create individual text blocks, tasks, notes etc. etc.

5. Selection on Map, after “GoTo Map”

Map marker’s in “standard red” colour



Map marker’s in “Sales Cycle” colour’s



Controls

A - “marker colour legend”

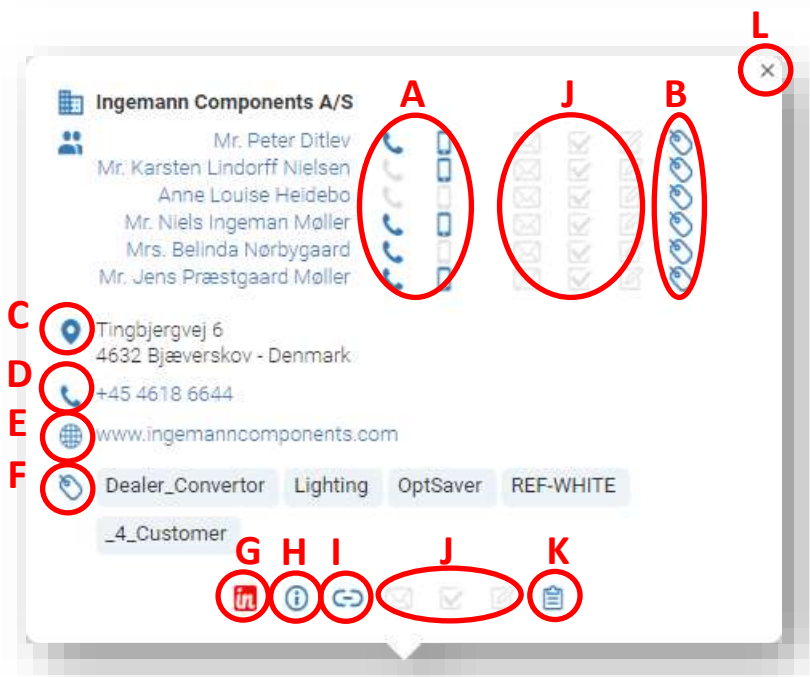
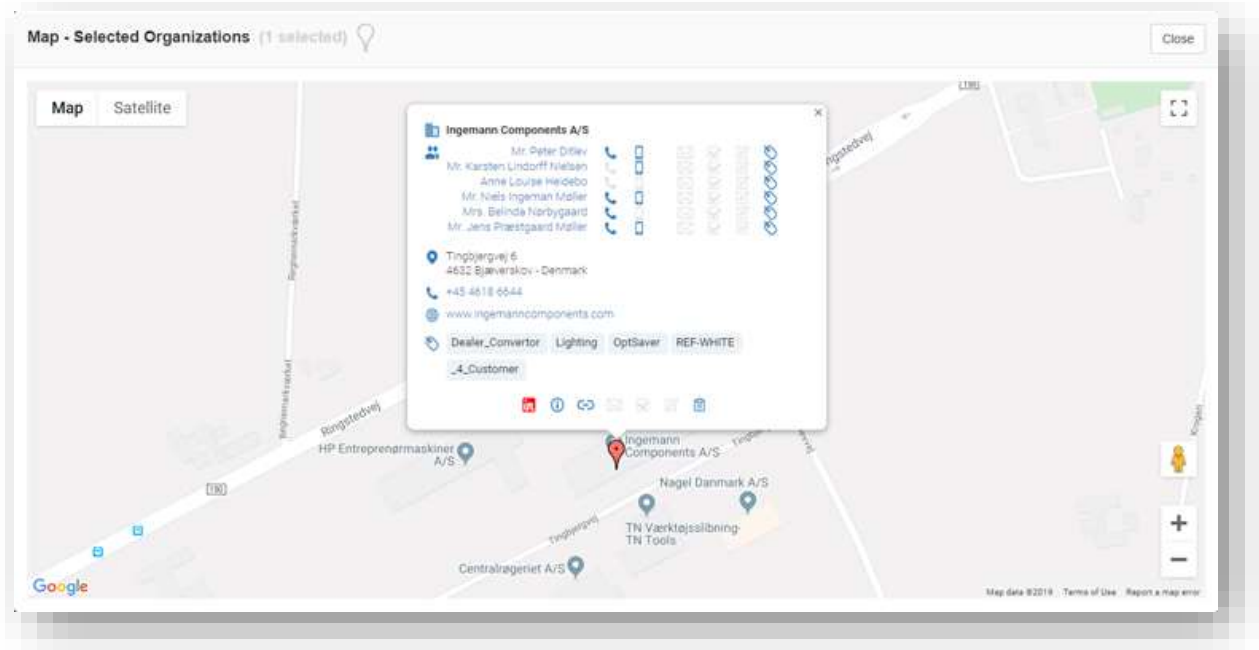
- click on the marker for a legend displaying the markers in the various Sales Cycle colours.

B - “close”

- close Map InfoWindow and return to “Organization Selection”.

(Misc - all Google Maps controls like “Zoom-in/-out “ , “dragging” , “StreetView” , “Full-ScreenView” etc.)

6. Map Marker InfoWindow



Controls

A - "Contact phone/mobile phone icon"

- "blue" when phone number present, otherwise "grey". **PC desktops:** on "mouse-over" a pop-up with QR code appears which can be scanned by a phone, to make a phone-call, "clicking" opens in Chrome a "sync" request with a (Android) phone. **Mobile devices:** "tapping" initiates a phone-call (can be cancelled).

B - "Contact Tags icon"

- always "blue", "clicking"/"tapping" opens a Tags dialogue, to Add/Edit Contact Tags (mainly used for "MailChimp" mail-shots).

C - "Organization Geolocation icon"

- always "blue". **PC desktops:** on "mouse-over" a pop-up with QR code appears which can be scanned by a phone to initiate a Google Maps route request in the Google Maps phone app. "clicking" opens

in Chrome a new browser tab showing an Organization location on a Google Map. **Mobile devices:** "tapping" initiates a Google Maps route request in the Google Maps phone app. (incl. all Google Maps controls like "Zoom-in/-out", "dragging", "StreetView", "Full-screenView" etc.)

D - "Organization phone icon"

- "blue" when phone number present, otherwise "grey". **PC desktops:** on "mouse-over" a pop-up with QR code appears which can be scanned by a phone, to make a phone-call, "clicking" opens in Chrome a "sync" request with a (Android) phone. **Mobile devices:** "tapping" initiates a phone-call (can be cancelled).

E - "Organization website icon"

- "blue" when website present, otherwise "grey". **PC desktops:** on "clicking"/"tapping", opens in Chrome a new browser tab with the Organization website.

F - "Organization Tags icon"

- Always "blue", "clicking"/"tapping" opens a Tags dialogue, to Add/Edit Organization Tags, which are crucial to select and filter all Organizations in Insightly (also to be used for future "MailChimp" mail-shot selections).

G - "Insightly Organization Link icon"

- "clicking"/"tapping" opens in Chrome a new browser tab with the Insightly Organization page, so that detailed Organization modifications/tasks can be done.

H - "Organization Background Information icon"

- always "blue", "clicking"/"tapping" opens a pop-up to view the background information.

J - "Organization/Contacts Email/Tasks/Notes icons"

- "Grey", to be (possibly) unlocked in the future to directly Add/Edit Organization Email/Tasks/Notes.

H - "Organization Data icon"

- always "blue", "clicking"/"tapping" copies the Organization data (name, address, phone number, website and, Contact(s) details) to the "clipboard". Usage is to easily "copy-paste" the Organization data into an email or other document, or other Organization details sharing.

L - "close"

- close Organization InfoWindow.

7. Adding as a “Web App” to your iOS or Android phone/tablet Home Screen

The app has build-in features which makes adding to your phone/tablet “Home Screen” a very simple process.

Advantage: that the app will display itself “full-screen”, without a browser interface, so that more space is available to browse app content. And faster to start up.

On Android devices

- Launch Chrome for Android and open the website url: <https://www.kag-crm.com>
- Tap the right-corner “Menu” button



- Choose “Add to Home Screen”
- You will be able to enter a name for the shortcut.
- Click “Add”, and then Chrome will add the KAG CRM app icon to your home screen.
- Now the KAG CRM icon has appeared on your homescreen

- Done!



On iOS devices

- Launch Safari and open the website url: <https://www.kag-crm.com>
- Tap the bottom “Add” button



- Tap “Add to Home Screen” icon



- You will be able to enter a name for the shortcut
- Click “Add”, and Safari will add the KAG CRM app icon to your Home Screen.
- Now the KAG CRM icon has appeared on your Home Screen

- Done!



Other portable devices

Adding to Home Screens of other portable devices, has not been tested, nor foreseen. Like on PC’s or larger screens the need for “full-screen” mode is limited (on Windows 10 it might work).