

CHECK-fleet

for

Salesforce Field Service (FS)

Installation and Setup Guide

Check-fleet Extension Package Version 1.0 (Prefix ChkXSFS)

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support@gpsdashboard.com

(877) 937-3654 X2

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appexchange

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Check-fleet for FS Overview

If you use Salesforce Field Service (FS) to manage your service techs AND Geotab to manage your vehicles / techs, integrating the two platforms provides substantial productivity gains for supervisors, dispatchers, and managers:

- Real Time location of all vehicles.

- Plan Vs Actual. Compare Scheduled Service Appointments to Actual Vehicle Stops.

- Update Service Appointments

 - Auto Update Status: "Dispatched" to "On Site"

 - Actual Start & End Times, Visit Durations

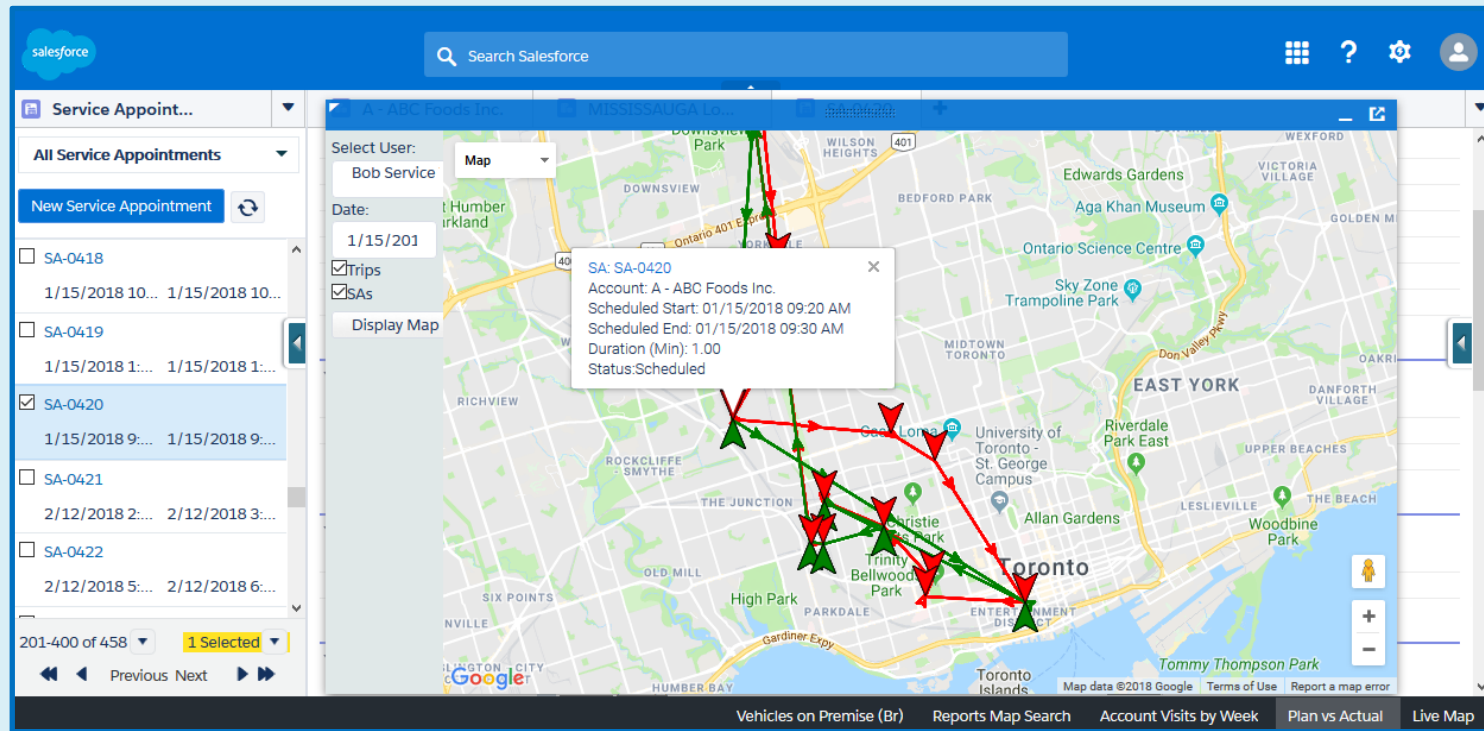
 - Actual Driving Distance & Driving Duration to a Job Site

Check-fleet for FS Features:

“Check-fleet for FS” automates the integration of GPS data from Geotab with FS

- Geocode Service Appointment Addresses using Google Geocode API (replace Salesforce’s native Data.com)
- Auto create a Geofence around a Service Appointment Location.
- Auto update Service Appointment Status when a vehicle arrives at a Service Appointment Location
- Auto capture GPS based Service Appointment visit details, including:
 - Which vehicle/ tech stopped at a SA, when, and for how long
 - Total Time at SA Location by All Techs
 - Total Drive Durations and Drive Distances to the SA Location
- Simple One-Time Setup

Overview: Plan vs. Actual



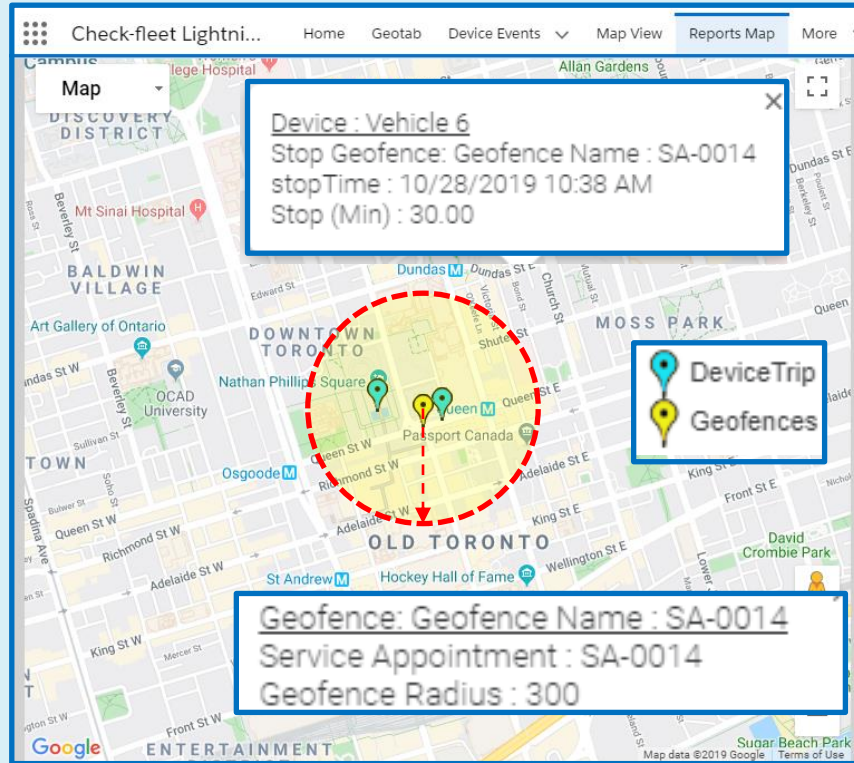
Overview: Geofence @ SA

1. Service Appointment SA-0014

- A Geofence is created around the SA
- The Geofence is “Active” for a limited duration (customer definable)

2. While the Geofence is Active, vehicle stops within the Geofence are captured.

- Which Vehicle stopped.
- Start/End Times & Stop Duration



Geofence with Vehicle Stops

Overview : Vehicle Stops @ SA

Service Appointment SA-0014

- Related Geofence SA-0014
- Related Vehicle Stops at SA-0014 (Geofence SA-0014)
 - "Vehicle 6" stopped twice
 - On 10/28 @ 8:52AM & 10:38AM


Service Appointment
SA-0014

[Related](#)
[Details](#)


Geofences (1)

New

GEOFENCE NAME
SA-0014

View All


Device Trips (2)

New

DEVICE TRIP NAME	DEVICE	TRIPDATE	STOPTIME
DT- 995	Vehicle 6	10/28/2019	10/28/2019 10:38 AM
DT- 996	Vehicle 6	10/28/2019	10/28/2019 8:52 AM

Service Appointment with Related Geofence & Vehicle Stops

Overview : Actual Start & End @ SA

Service Appointment SA-0014

Updated with:

- Actual Start Time
- Actual End Time
- Visit Duration

 Service Appointment SA-0014	
▼ Actual Times	
Actual Start 10/28/2019 10:38 AM	Actual Duration (Minutes) 29.00
Actual End 10/28/2019 11:08 AM	

Service Appointment Updated with Actual Start & End Times

Overview : Total Visit Durations at SA

Service Appointment

Individual vehicle visits to the SA are aggregated into custom SA fields:

- Total Visit Duration
- Total Travel Distance (to SA)
- Total Driving Duration (to SA)
- Total Idle Duration

Service Appointment

SA-0014

[Service Appointments > SA-0014](#)

Device Trips

2 items • Sorted by stopTime • Updated 6 minutes ago

New

Change Owner

⚙️

🔄

🔍

	☐ Device Trip ...	Device	TripDate	stopTime ↑	Stop (Min)
1	☐ DT- 996	Vehicle 6	10/28/2019	10/28/2019 8:52 AM	4.83
2	☐ DT- 995	Vehicle 6	10/28/2019	10/28/2019 10:38 AM	30.00

▼ Total Actuals

Total Visit Durations (Min)

34.83

Total Idling Durations (Min)

0.35

Total Travel Distance (Miles)

11.46

Total Driving Durations (Min)

52.52

Service Appointment updated with total of all vehicle stops

Check-fleet for FS: App Requirements

To install & setup Check-fleet for FS, you must have previously installed:

1. Check-fleet App ([Check-fleet on AppExchange](#))

Check-fleet integrates Geotab Fleet Management with Salesforce Sales & Service Clouds

2. Salesforce Field Service (FS)

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce org.

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "locked" and cannot be modified. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix
Uninstall	 FSL	Salesforce	222.0.27	FSL
Uninstall Manage Licenses	 Check-fleet	GPS Dashboard, Inc.	1.144	chkfleet

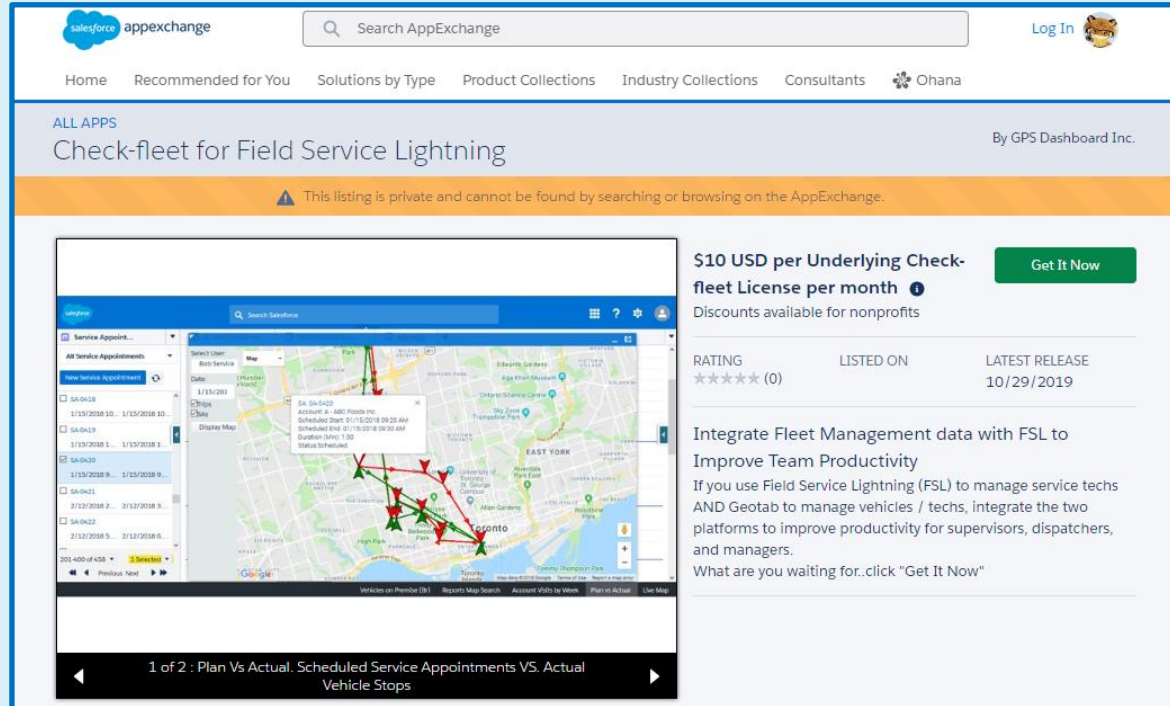
Installation

Check-fleet for FS App:

- Click Link to App on the [Salesforce AppExchange](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G0xiOUAB)
(<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000G0xiOUAB>)

- Click **"Get It Now"** button

Note: Optionally, you can install Check-fleet for FS by clicking a URL provided By GPS Dashboard, please contact us for details.



Check-fleet for Field Service Lightning By GPS Dashboard Inc.

⚠ This listing is private and cannot be found by searching or browsing on the AppExchange.

\$10 USD per Underlying Check-fleet License per month **Get It Now**

Discounts available for nonprofits

RATING	LISTED ON	LATEST RELEASE
★★★★★ (0)		10/29/2019

Integrate Fleet Management data with FSL to Improve Team Productivity

If you use Field Service Lightning (FSL) to manage service techs AND Geotab to manage vehicles / techs, integrate the two platforms to improve productivity for supervisors, dispatchers, and managers.

What are you waiting for..click "Get It Now"

1 of 2 : Plan Vs Actual. Scheduled Service Appointments VS. Actual Vehicle Stops

Installation *(continued)*

1. Select “**Install For All Users**”

2. Click “**Install**”

Note: A User will gain access to Check-fleet for FS if / when you assign the User a Check-fleet for FS App license. Instruction in following pages



Upgrade Check-fleet Ext SFS

By GPS Dashboard - Check-fleet Extension for SFS



An earlier version is installed. It can be upgraded while preserving the existing data.
 Installed: Check-fleet Ext for SFS (1.12) New Version: Check-fleet Ext for SFS (1.12)



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...



You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Upgrade

Cancel

App Name	Publisher	Version Name	Version Number
Check-fleet Ext SFS	GPS Dashboard - Check-fleet Extension for SFS	Check-fleet Ext for SFS	1.12

Installation *(continued)*

1. Wait for the message
"Installation Complete!"
2. Click **"Done"**



Installing and granting access to all Users...



Upgrade Check-fleet for FSL

By ChkFleet FSL EXT Pckg



Upgrade Complete!

Done

App Name

Publisher

Version Name

Version Number

Check-fleet for FSL

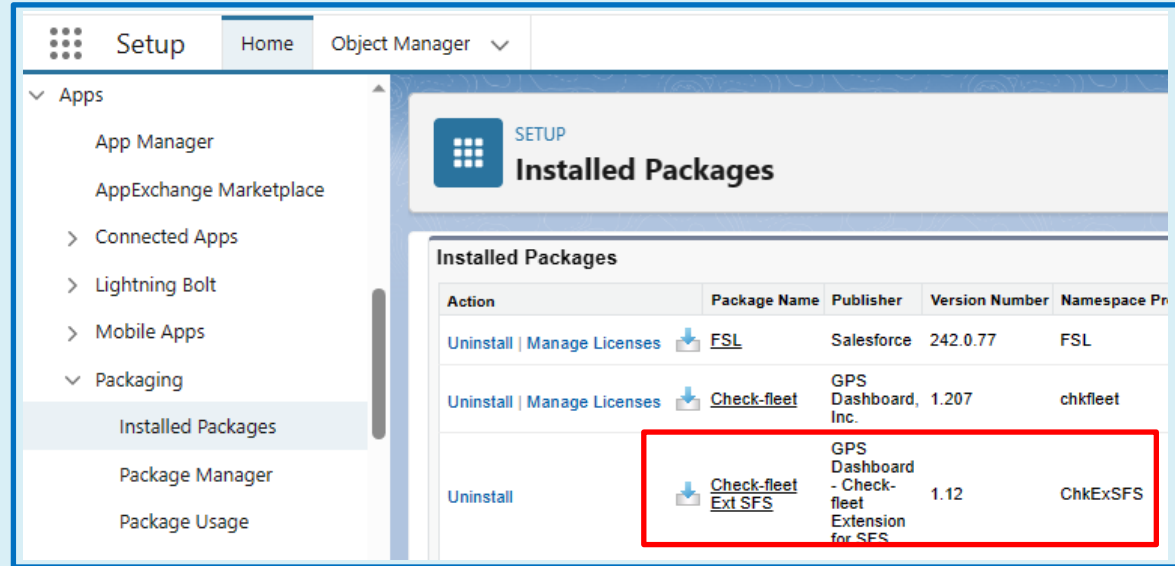
ChkFleet FSL EXT Pckg

Check-fleet for FSL

1.22

Assign User Licenses

1. From Setup > Installed Packages
2. Click **"Manage Licenses"** for Check-fleet for FS App



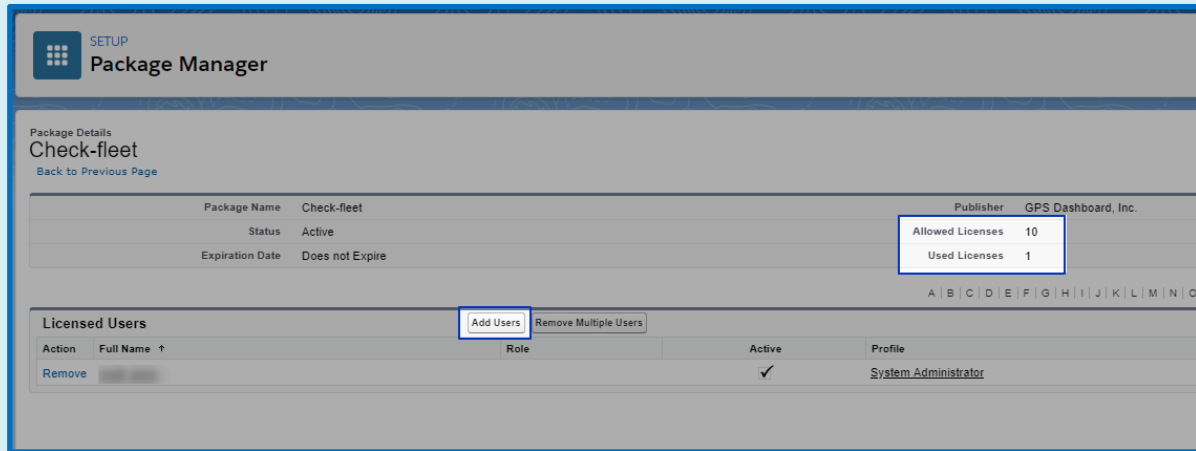
The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area displays the 'Installed Packages' section. The table below lists the installed packages, with the 'Check-fleet for FS' package highlighted by a red box.

Action	Package Name	Publisher	Version Number	Namespace Pr
Uninstall Manage Licenses	FSL	Salesforce	242.0.77	FSL
Uninstall Manage Licenses	Check-fleet	GPS Dashboard, Inc.	1.207	chkfleet
Uninstall	Check-fleet - Check-fleet Extension for SFS	GPS Dashboard - Check-fleet Extension for SFS	1.12	ChkExSFS

Assign User Licenses *(continued)*

Click “**Add Users**” to assign a Check-fleet for FS App License to a User

✳ **Note:** Used Licenses indicates the number of Check-fleet licenses already assigned to Users. Used Licenses cannot exceed the Allowed Licenses. During the Free Trial, the # of Allowed Licenses is 3. Once you subscribe to Check-fleet the number reflects the # of Check-fleet licenses purchased.



The screenshot shows the 'Package Manager' interface. At the top, there's a 'SETUP' button and the title 'Package Manager'. Below this, the 'Package Details' section shows 'Check-fleet' with a 'Back to Previous Page' link. A table displays package information: Package Name (Check-fleet), Status (Active), Expiration Date (Does not Expire), Publisher (GPS Dashboard, Inc.), Allowed Licenses (10), and Used Licenses (1). The 'Used Licenses' value is highlighted with a red box. Below the package details, there's a 'Licensed Users' section with 'Add Users' and 'Remove Multiple Users' buttons. The 'Add Users' button is highlighted with a red box. A table lists the licensed users, showing columns for Action, Full Name, Role, Active, and Profile. One user is listed: 'System Administrator' with a checkmark in the 'Active' column.

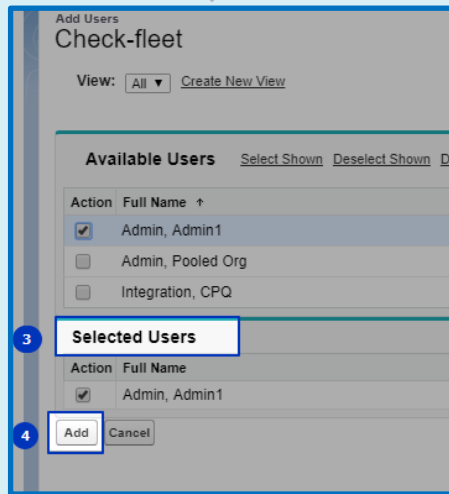
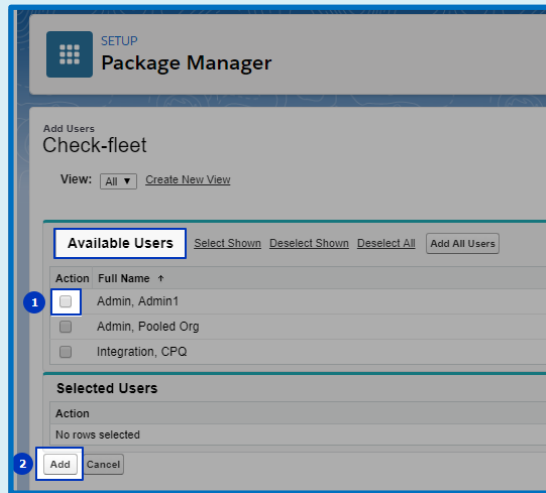
Package Name	Check-fleet	Publisher	GPS Dashboard, Inc.
Status	Active	Allowed Licenses	10
Expiration Date	Does not Expire	Used Licenses	1

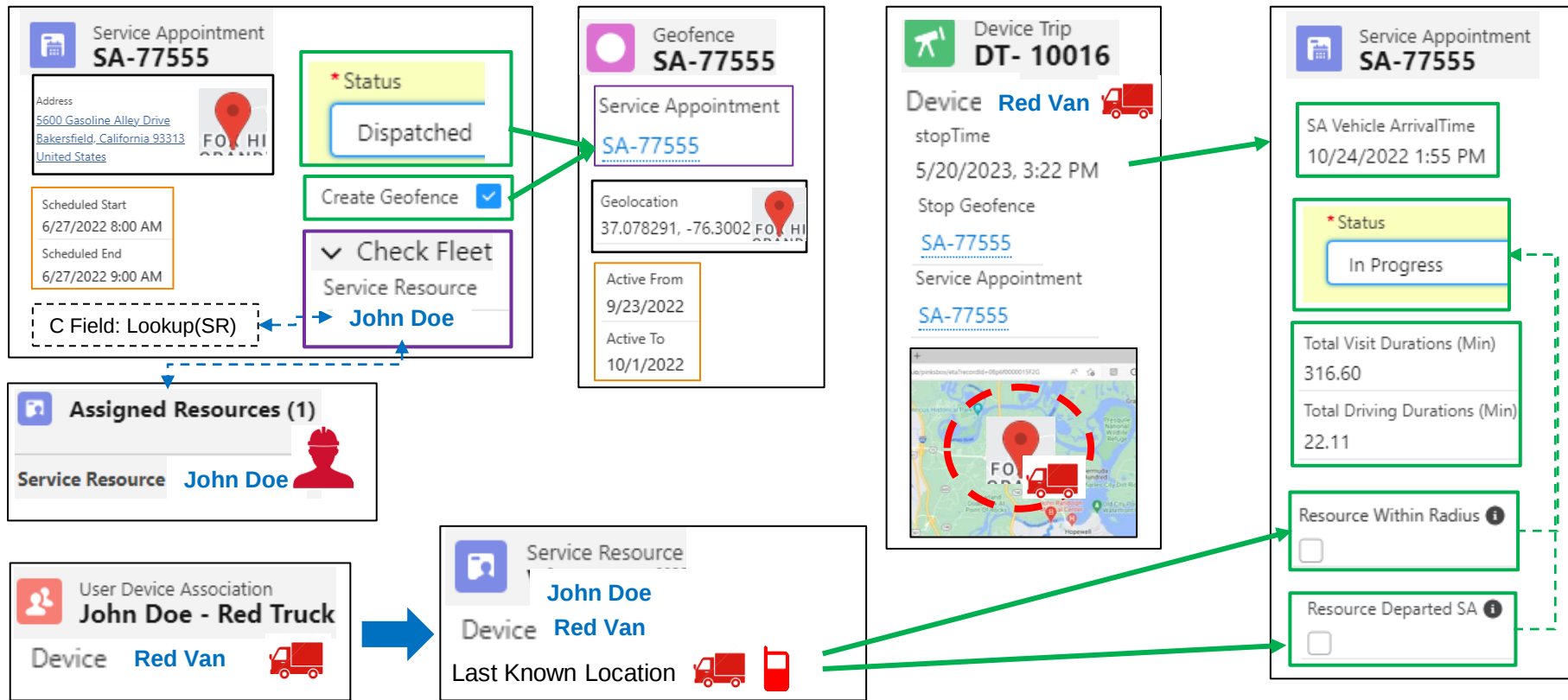
Licensed Users		Add Users		Remove Multiple Users	
Action	Full Name ↑	Role	Active	Profile	
Remove	[Redacted]		✓	System Administrator	

Assign User Licenses

1. In section "**Available Users**", select one or more users.
2. Click "**Add**"
3. The selected User is added to the section "**Selected Users**"
4. Click "**Add**"

Note: Unselect a User if you do not wish to assign the User a Check-fleet App license, or click "Cancel" to abandon altogether.





Geofence Setup:

Custom Metadata Type
"Geofence for Service Appointment":

Each Section will be described in following slides

Enable Geofence Matching to Trips

Auto Create Geofence Related to an SA

Location and Size (Radius)

Active Time Period Related to Parent SA Scheduled Times

Active Time Period Not Related to Parent SA

This Geofence For Service Appointment is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Geofence For Service Appointment Edit

[Save](#) [Save & New](#) [Cancel](#)

Information

Label: Namespace Prefix: ChkExSFS

Geofence For Service Appointment Name: [i](#)

Enable Matching Trips to Geofences in Extension Package

Enable Geofence Calculation in Ext Pckg: ☒

Auto Create Geofence if SA Status Or Category Match Saved Values

Enable Trigger to Create Geofence: ☒

SA Field To Create Geofence:

SA Field Values To Create Geofence:

Default Geofence Values (SA API Field Names For Address Lat & Long)

Geofence Latitude:

Geofence Longitude:

Geofence Radius (Meters):

Geofence Active From Date = SA ScheduledStart & Active To = SA Scheduled End

Geofence Active Period (Days):

Geofence Dates Use SA Dates: ☒

Adjust Geofence Active From:

Adjust Geofence Active To Date:

If "Geofence Dates Use SA Dates" Not Checked: Geofence Active From = Today()

Geofence Active Duration (Days):

Continued on next page....

Geofence Setup:

Custom Metadata Type
"Geofence for Service
Appointment":

Restrict Geofence to
One Service Resource

Enable Totals on
Service Appointment

Update Geofence If
Parent SA is Updated

Continued from previous page....

Restrict Geofence to SR Assigned to the SA

Enable UserDevice Trigger ☒

Enable SA2SR Trigger ☒

SA Status for SA2SR

SA Assigned SR

Enable Total Actuals on SA

Enabled Calculate Totals On SA ☒

Update Geofence if Parent SA is Updated

Update Geofence Dates on SA ☒

Update

Un-Schedule Geofence ☒

De-Activate Geofence On SA

Completion

Save

Save & New

Cancel

Geofence Setup: Custom Metadata Type "Geofence for Service Appointment":

Custom Metadata Type
"Geofence for Service
Appointment":

Click "Manage Records"

The screenshot shows the GPS Dashboard interface. The top navigation bar includes a search bar labeled "Search Setup" and a menu with options: Setup, Home, and Object Manager. The left sidebar shows a search bar with "custom meta" and a list of custom code items, including "Custom Metadata Types". The main content area is titled "Custom Metadata Types" and displays a table of installed packages.

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name
Manage Records	Geofence Config	Check-fleet	chkfleet	Public	chkfleet__Geo
Manage Records	Geofence For Service Appointment	Check-fleet Ext SFS	ChkExSFS	Public	ChkExSFS__C

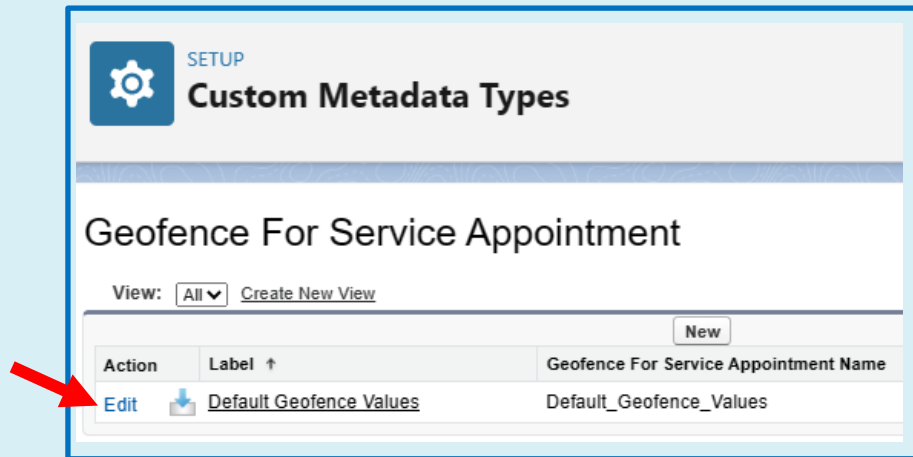
A red arrow points to the "Manage Records" link for the "Geofence For Service Appointment" row.

Geofence Setup: Custom Metadata Type “Geofence for Service Appointment”:

Custom Metadata Type
“Geofence for Service
Appointment”:

“Default Geofence Values”

Click “Edit” to customize
for your use case.



Geofence Setup: Geofence Location and Size

1. **Enable Geofence Matching to Trips:**
If enabled vehicle stops within Geofences will be reflected on the related Service Appointments and the corresponding SA fields will be updated in near real time, for example vehicle Arrival Time at the SA.
2. **Auto Create Geofence if / when a Service Appointment Status or Status Category is updated to the defined value(s):**
 1. SA Field to Create Geofence: "Status" OR "Status Category"
 2. Field Values must match picklist values in customer org. One or more values maybe entered comma separated with no space after the comma, example "scheduled,dispatched".

Enable Matching Trips to Geofences in Extension Package

Enable Geofence Calculation In Ext Pckg ☒

Auto Create Geofence if SA Status Or Category Match Saved Values

SA Field To Create Geofence 

SA Field Values To Create Geofence 

Geofence Setup: Geofence Location and Size

1. Geofence Location:

Copied from FS Service Appointment (SA)

1. SA API Field names where Latitude & Longitude values copied from
2. Typically, the Service Appointment "Latitude" & "Longitude"

2. Geofence Default Size:

Geofence shape is a Circle, with center defined in (1) and radius in Meters.

Typical value is 300M (note 1 m = 3 ft Approx.)

Default Geofence Values (SA API Field Names For Address Lat & Long)

Geofence Latitude  latitude

Geofence Longitude  longitude

Geofence Radius (Meters) 300

Geofence Setup: Geofence Active Time Period

1. Checkbox "Geofence Dates Use SA Dates": Checked

When a Geofence is created the Geofence "Active From" & "Active To" Dates are set based on the Service Appointment 'Scheduled Start' and 'Scheduled End' values.

Typically, an adjustment is added so the Active From is set to 1 day prior to the Scheduled Start Date, and Active To is set to 1 day after the Scheduled End Date.

The Active To date cannot be the same as the Active From date. The default values are thus set to "-1" and "1" respectively.

If the vehicle stops at a Geofence on a Date within the Active Time Window, the vehicle trip is tagged with the Geofence. The Geofence is ignored otherwise.

2. Checkbox "Geofence Dates Use SA Dates": Unchecked

When a Geofence is created the Active From date is set = Today, and the Active To is set based on the value entered in the Geofence Active Duration in days. Example on January 1st, if the value entered is 3 Days, the Geofence Active From Date = Jan 1, and the Active To Date = Jan 4.

Geofence Active From Date = SA ScheduledStart & Active To = SA Scheduled End

Geofence Active Period (Days) The Geofence Active From Dates and Active To Dates are set bas

Geofence Dates Use SA Dates ☒

Adjust Geofence Active From -1

Adjust Geofence Active To Date 1

Geofence Active From Date = SA ScheduledStart & Active To = SA Scheduled End

Geofence Active Period (Days) The Geofence Active From Dates and Active To Dates are

Geofence Dates Use SA Dates ☐

If "Geofence Dates Use SA Dates" Not Checked: Geofence Active From = Today()

Geofence Active Duration (Days) 7

Geofence Setup: Restrict Geofence to one SR

When a vehicle stops within an Active Geofence the vehicle trip (Device Trip) is tagged with the Geofence. If multiple vehicles stop within the Geofence each trip is tagged with the Geofence. A typical use case is a construction site where multiple vehicles may stop at the construction site, on right stops for Vehicles 7, 10, & 11 are captured at Geofence A-436.

Assuming an SR is assigned to a vehicle, on right SR "Repair Technician" is assigned "Vehicle 11", the Geofence maybe restricted to one SR only and stops by other vehicles are ignored.

To Restrict a Geofence to ONE SR, relate the Geofence to a Parent Service Appointment (SA), on right Geofence SA-0025 has a lookup on Service Appointment SA-0025, and populate the SA's Custom Field "Service Resource" ("ChkSFS__ServiceResource__c" a lookup on the SR) with the appropriate SR, on right populated with SR "Repair Technician"

 Geofence A - 436		
 Device Trips (6+)		
Device	stopTime	Stop (Min)
Vehicle 10	2/7/2022, 7:33 AM	10.02
Vehicle 7	2/7/2022, 7:45 AM	4.95
Vehicle 11	2/7/2022, 1:31 PM	1,110.17

 Service Resources All Service Resources			
☐	Name ↑	User	Device
1	☐ Repair Technician	Repair Tech	Vehicle 11

 Geofence SA-0025	
Service Appointment	
SA-0025	

 Service Appointment SA-0025	
Service Resource	
Repair Technician	

Geofence Setup: Restrict Geofence to one SR (Continued)

To Restrict a Geofence to One SR:

A If you use Field Service "Assigned Resources":

- 1 "Enable SA to SR Trigger": Checked
- 2 Assign ONLY ONE Service Resource to the Service Appointment

Restrict Geofence to SR Assigned to the SA

- 1 Enable SA2SR Trigger ☒
- SA Status for SA2SR
- SA Assigned SR

 Service Appointment
SA-0025

 Assigned Resources (1)

Service Resource

 Tech John Doe

2

B If you use a Custom Field on the Service Appointment for the Assigned Resource, a lookup on SR, example "MyCustomField_ServiceResource_c":

- 1 "Enable SA to SR Trigger": Checked
- 2 "SA Status for SA2SR": Typically scheduled or dispatched
- 3 Populate the "SA Assigned SR" with the API name of your custom field

Restrict Geofence to SR Assigned to the SA

- 1 Enable SA2SR Trigger ☒
- 2 SA Status for SA2SR
- 3 SA Assigned SR

Geofence Setup: Enable Totals on Service Appointment

To Display cumulative distances and durations by all SR's Trips on a Service Appointment record:

1 "Enable Calculate Totals on SA": Checked

1

Enable Total Actuals on SA

Enabled Calculate Totals On SA ☒

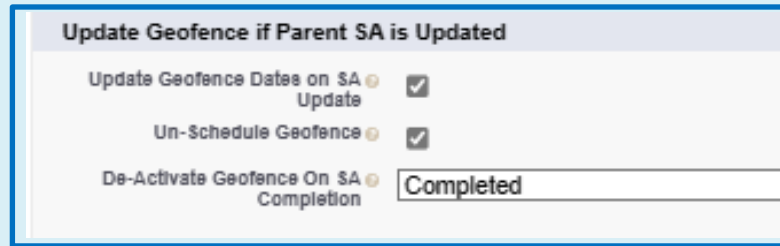
Depending on the setup, if an SR stops at the SA Geofence more than once, the cumulative distance travelled to the Geofence and the cumulative driving, stop & idle durations are recorded on the SA.

Field Service				Home	Reports	Field Service	Accounts	Work Orders	Service Appointments
Service Appointment				SA-0045					
Check-fleet Actual Times									
SA Vehicle ArrivalTime				Total Visit Durations (Min)					
10/18/2022, 11:51 AM				22.96					
Vehicle Arrival Time				Total Driving Durations (Min)					
10/18/2022, 2:23 PM				68.66					
Vehicle Departure Time				Total Idling Durations (Min)					
10/18/2022, 2:33 PM				22.96					
Vehicle Stop Duration (Min)				Total Travel Distance (Miles)					
10.0				15.41					

Geofence Setup: If SA is Updated, Update Related Geofence

To Update a Geofence when the Parent Service Appointment is updated :

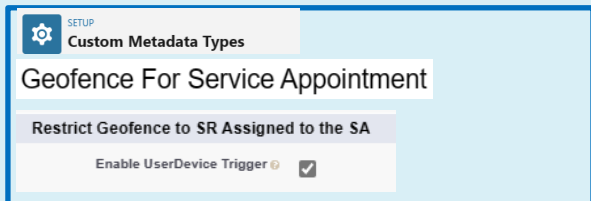
“Update Geofence Dates On SA Update”: Checked



Update Geofence if Parent SA is Updated	
Update Geofence Dates on SA Update	☒
Un-Schedule Geofence	☒
De-Activate Geofence On SA Completion	Completed

1. If the SA ScheduledStartTime and / or the SA ScheduledEndTime are updated. The Geofence Active From and / or Active To dates are updated.
2. If the SA address is updated, specifically if the Latitude and Longitude fields on the SA are updated, the Geofence Latitude & Longitude are updated. SA Lat & Long defined in CDMT, see slide X.
3. Un-Schedule Geofence, “Checked”: If a Geofence’s parent SA is updated and the SchedStartTime OR SchedEndTime are set to NULL (not populated), the Geofence Active From / Active To are also set to NULL.
4. If the “De-Activate Geofence on SA Completion” is populated with the SA Status(es) that indicate the SA is completed, the Geofence is De-activated by updating the Geofence “Active To” date to Today. You can enter multiple status values comma separated with no space after the comma, example “completed,cannot complete,canceled”

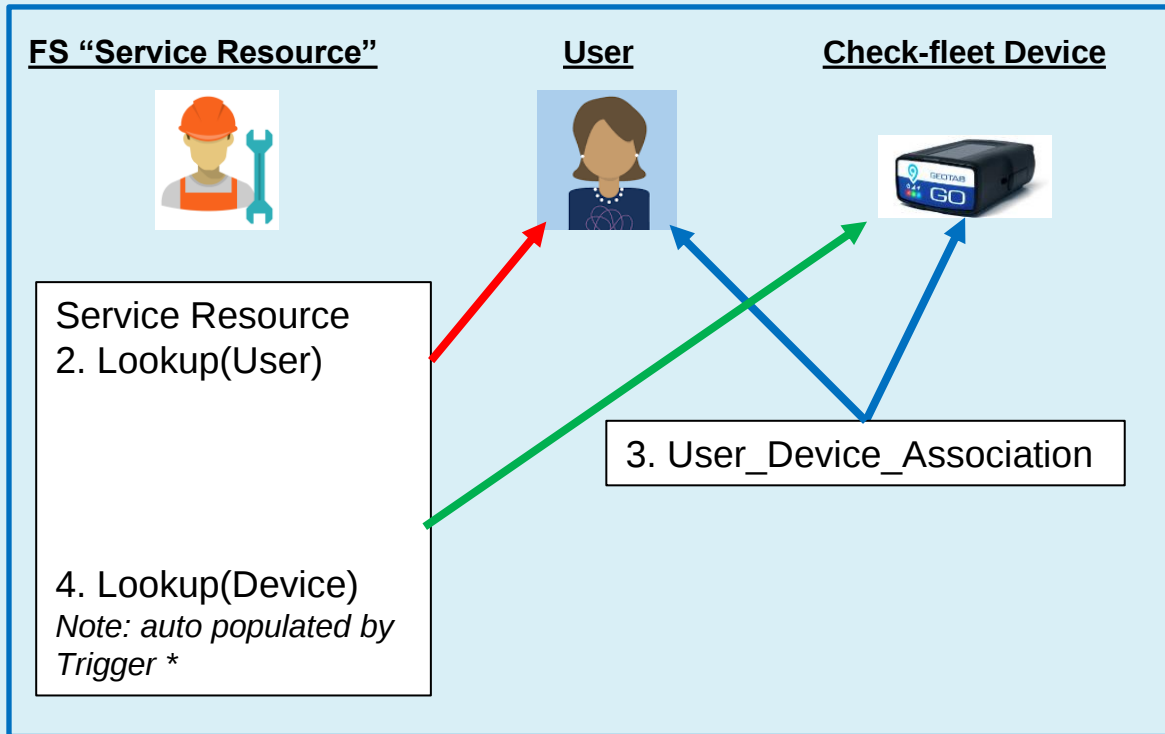
Salesforce User, FS Service Resource, and Check-fleet Device



To auto relate a Service Resource to a Device

1. Setup > Custom Metadata Type >
Check the Checkbox "Enable UserDevice Trigger"

2. Populate Service Resource.User field
3. On Create a New User_Device_Association record
4. The Service Resource Custom Field ChkFltXFSL__Device__c [lookup(device)] is auto populated



Set-up: FS Service Appointment Custom Fields (continued)

“SchedStartDate”:

- A formula field required by App. Not editable.

The screenshot shows the 'Service Appointment' setup page in the GPS Dashboard. The breadcrumb trail is 'SETUP > OBJECT MANAGER'. The page title is 'Service Appointment'. On the left, there is a navigation menu with four items: 'Details', 'Fields & Relationships' (which is highlighted), 'Page Layouts', and 'Lightning Record Pages'. The main content area is titled 'Fields & Relationships' and shows '64 Items, Sorted by Field Label'. There is a 'Quick Find' search bar and 'New' and 'Field' buttons. The table below lists the fields:

	Field Name	Field Label	Field Type
	Create Geofence	ChkFitFSL__Create_Geofence__c	Checkbox
	SchedStartDate	ChkFitFSL__SchedStartDate__c	Formula (Date)

Set-up: FS Service Appointment Custom Fields (continued)

SA Custom Fields auto updated based on one or more related Trips

“SA Vehicle Arrival Time”: Captures the time the vehicle first arrived at the Service Appointment. This field is not updated thereafter.

“Vehicle Arrival Time” & “Vehicle Departure Time” auto-populated based on related “Device Trip”, values auto-updated to reflect the most recent related trip, ie values may be updated if more than one related trip

▼ Check Fleet Actual Times

SA Vehicle ArrivalTime
10/18/2022 3:37 PM

Vehicle Arrival Time
10/18/2022 3:56 PM

Vehicle Departure Time
10/18/2022 4:42 PM

Vehicle Stop Duration (Min)
46.2

Assumptions:

- The SA has a related Geofence and the Geofence status is Active
- If multiple DeviceTrips are associated with a SA, the fields will be overwritten by subsequent Device Trips.
- If the optional Geofence Custom Field “Match Trip Device to SA SR Device” is checked, the Geofence is restricted to the SR assigned to the SA [slide #40]

Set-up: FS Service Appointment Custom Fields (continued)

Service Appointment Custom Fields:

- "Total Driving Duration (Min)"
- "Total Idling Durations (Min)"
- "Total Travel Distance (Miles)"
- "Total Visit Durations (Min)"

▼ Check Fleet Actual Times

SA Vehicle ArrivalTime	Total Visit Durations (Min)
10/18/2022 3:37 PM	316.60
Vehicle Arrival Time	Total Driving Durations (Min)
10/18/2022 3:56 PM	22.11
Vehicle Departure Time	Total Idling Durations (Min)
10/18/2022 4:42 PM	10.55
Vehicle Stop Duration (Min)	Total Travel Distance (Miles)
46.2	2.95

Assumptions:

- The SA has a related Geofence and the Geofence status is Active
- If Geofence is Restricted to 1 SR [slide #27] : Checked: the Totals are aggregated for the 1 assigned vehicle that stops at the Service Appointment
- If Geofence is NOT Restricted: the Totals are aggregated for ALL vehicles that stop at the Service Appointment

Custom Metadata Type: Customizable parameters for proximity assessment

If checked, the Assigned Service Resource is within Pre-Defined distance from the Service Appointment Address. Distance formula used to measure distance between the SR.LastKnownLocation & the ServiceAppointment Address.

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Service Resource Departed SA

The SA is auto updated when the Service Resource distance to the Service Appointment exceeds a minimum radius

Custom Metadata Type: Customizable parameters for proximity assessment



Service Appointment
SA-0008

▼

Check-fleet ETA Service

Service Resource
[Service Technician](#)

Resource Within Radius ⓘ
☐

if Checked, the Assigned Service Resource has departed the Service Appointment. The SR had previously arrived at the SA and the SR's most recent location is outside a predefined distance from the SA.

Resource Departed SA ⓘ
☐

Resource Departed Service Appointment Detail

Edit Clone

Label	Default
Resource Departed Service Appointment Name	Default
▼ Enable Trigger Service Resource (SR) Departed Service Appointment (SA)	
enableSRDeparted	☒
▼ Trigger Will Fire if CHANGE in SR Last Known Location Exceeds Distance (Meters)	
Travel Distance To Enable Trigger	300
▼ SA API Field Names For Address Lat & Long for Distance Calculation	
Latitude	Latitude
Longitude	Longitude
▼ Trigger DISABLED if SA Status or Category Match Saved Values	
Status or Equivalent	Status
Status Field Values	Cancelled, Completed
▼ Minimum SR Distance Travelled From Service Appointment Lat & Long	
Minimum Travel Distance (Miles)	5.1
▼ Optional If Conditions Met SA Status Updated To This Values	
SA Status Departed	Completed

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Service Resource Within Radius & SR Departed SA

Optional: auto update the SA Status on SR Within Radius or SR Departed SA

Custom Metadata Type: Customizable parameters

Resource Within Radius Detail

▼ Optional If Conditions Met SA Status Updated To This Value

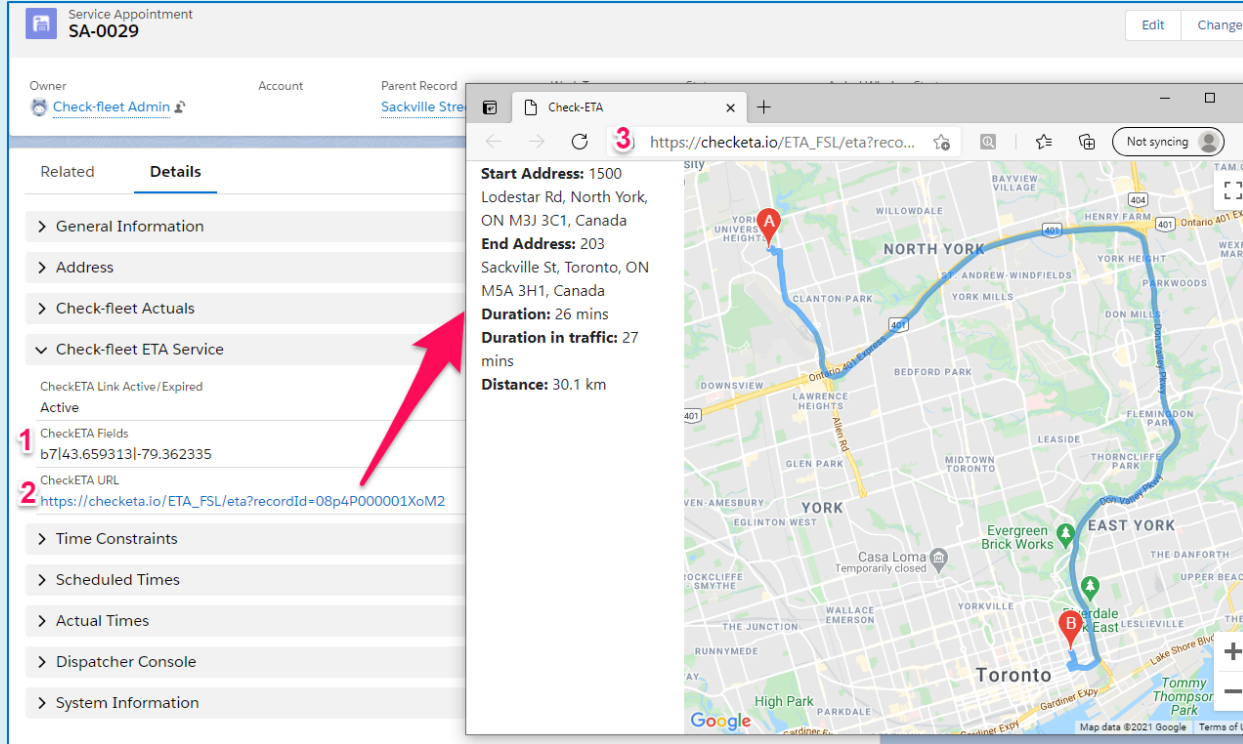
SA Status Within Radius  In Progress

Resource Departed Service Appointment Detail

▼ Optional If Conditions Met SA Status Updated To This Values

SA Status Departed  Completed

ETA for Field Service: Contact Support re ETA Setup



The screenshot displays the GPS Dashboard interface. On the left, a sidebar shows a list of service appointments. The appointment 'SA-0029' is selected, and its details are shown in the main panel. A red arrow points to the 'Check-ETA URL' field, which contains the URL: https://checketa.io/ETA_FSL/eta?recordId=08p4P000001XoM2. On the right, a map shows a route from 'Start Address: 1500 Lodestar Rd, North York, ON M3J 3C1, Canada' to 'End Address: 203 Sackville St, Toronto, ON M5A 3H1, Canada'. The route is highlighted in blue, and the estimated time and distance are displayed: 'Duration: 26 mins' and 'Distance: 30.1 km'.

Service Appointment SA-0029

Owner: Check-fleet Admin
Account: Sackville Street
Parent Record: Sackville Street

Details

- General Information
- Address
- Check-fleet Actuals
- Check-fleet ETA Service
 - CheckETA Link Active/Expired: Active
 - CheckETA Fields: b7l43.6593131-79.362335
 - CheckETA URL: https://checketa.io/ETA_FSL/eta?recordId=08p4P000001XoM2
- Time Constraints
- Scheduled Times
- Actual Times
- Dispatcher Console
- System Information

Check-ETA

Start Address: 1500 Lodestar Rd, North York, ON M3J 3C1, Canada
End Address: 203 Sackville St, Toronto, ON M5A 3H1, Canada
Duration: 26 mins
Duration in traffic: 27 mins
Distance: 30.1 km

Map showing route from North York to Toronto.

Setup: Geofence Example

FS Service Appointment SA -0014:

- ▶ When SA Status Updated to match CMDT value (see slide #24)

Geofence "SA-0014"

- ▶ A Geofence is auto created, with same name and related to SA-0014 [ie, Lookup(SA-0014)]
- ▶ The Geofence location is copied from SA per Custom Metadata Type
- ▶ The Geofence Radius, Active From, and Active To Dates populated per Custom Metadata Type

Service Appointment

SA-0014

Owner

Account

Check-fleet Admin

Related

Details

General Information

Address

Address

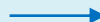
1 Harbour Square

Toronto, ON M5T 1G4

Canada

Create Geofence

1



Check-fleet Lightni...

Home

Geofence

SA-0014

Related

Details

Geofence Name

SA-0014

Service Appointment

SA-0014

2

Active From

10/27/2019

Active To

11/4/2019

Geolocation

43.65189, -79.38171

Geofence Radius

300

Geofence Radius Miles

0.186409

Is Active

☒