



Powered  
by **GEOTAB**

# Installation and Setup Guide

Check-fleet Version 1.222

March - 2024

[support@gpsdashboard.com](mailto:support@gpsdashboard.com)

(877) 937-3654 X2

AVAILABLE ON

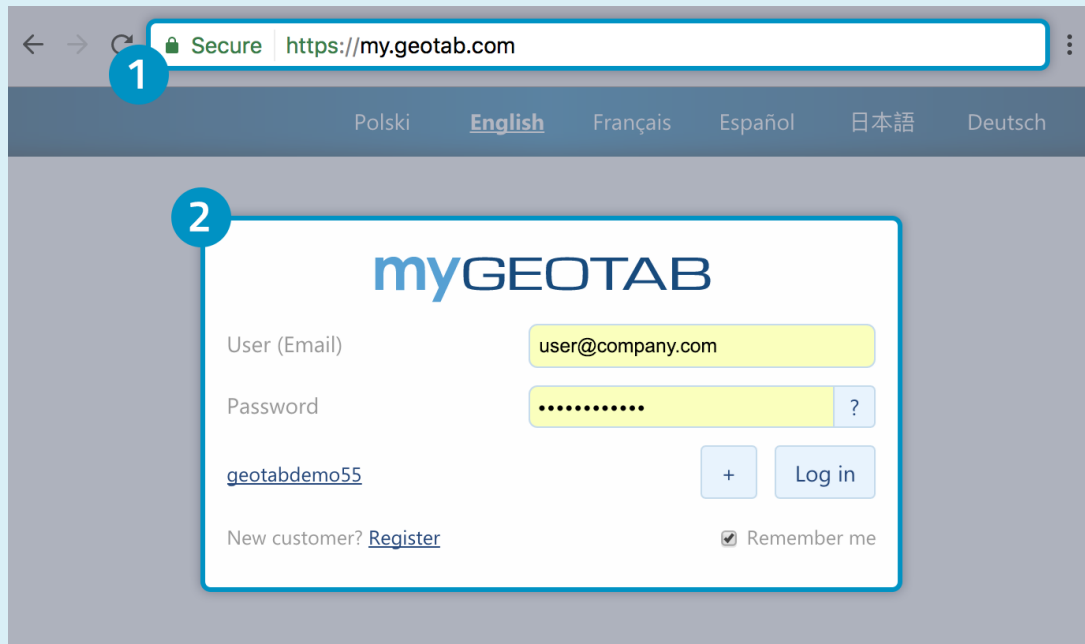


appexchange

# Check-fleet Requirements

Check-fleet integrates Geotab ([www.geotab.com](https://www.geotab.com)) with [Salesforce.com](https://Salesforce.com). To setup Check-fleet, you will need your Geotab login credentials:

- ▶ Database name
- ▶ User name
- ▶ Password



The screenshot shows the myGEOTAB login interface. A blue circle with the number '1' points to the browser's address bar, which contains the URL 'https://my.geotab.com'. Another blue circle with the number '2' points to the login form. The form includes the myGEOTAB logo, a 'User (Email)' field with the value 'user@company.com', a 'Password' field with masked characters and a toggle icon, a '+ Log in' button, a link for 'geotabdemo55', a 'New customer? Register' link, and a 'Remember me' checkbox.

1

2

myGEOTAB

User (Email) user@company.com

Password ..... ?

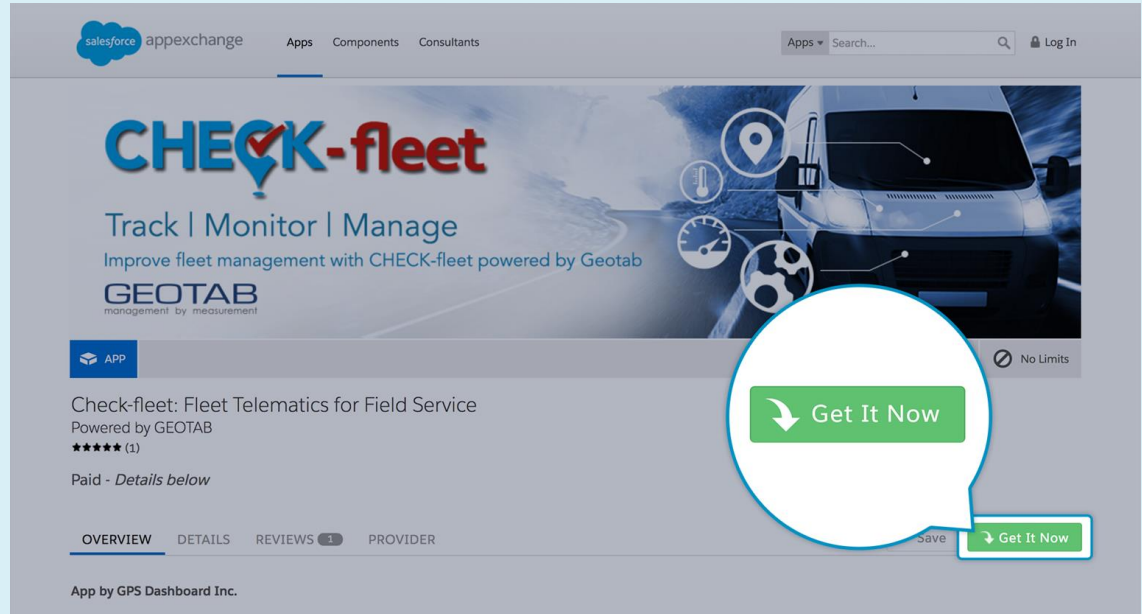
[geotabdemo55](#) + Log in

New customer? [Register](#) ☒ Remember me

## Check-fleet Installation

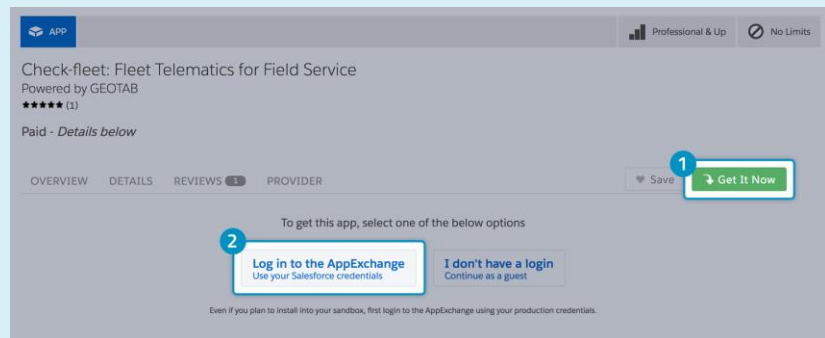
Find Check-fleet App by searching the [Salesforce AppExchange](#). Once you find the Listing Page, click “**Get It Now**” button.

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



## Check-fleet Installation

To install Check-fleet in your Sandbox Org, select the appropriate option and login with your sandbox credentials



### Confirm Installation Details

Review the [customization guide](#) for installation and configuration steps.

|                                               |                                 |
|-----------------------------------------------|---------------------------------|
| Package                                       | Version                         |
| Check-fleet (Check-fleet Summer 17 / 1.113.0) | Check-fleet Summer 17 / 1.113.0 |
| Subscription                                  | Organization                    |
| Free Trial                                    | GPSDB Ryder Ext Pckg            |
| Duration                                      | Number of Subscribers           |
| 14 Days                                       | 10 Subscribers                  |
| Username                                      |                                 |
| support@ryder.create                          |                                 |

Here are the details we'll share from your profile

|              |                          |                  |               |
|--------------|--------------------------|------------------|---------------|
| * First Name | Admin                    | * Company        | Admin         |
| * Last Name  | Admin                    | * Country        | United States |
| * Job Title  | Admin                    | * State/Province | California    |
| * Email      | support@gpsdashboard.com |                  |               |
| Phone        |                          |                  |               |

☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. Please [click here](#) for detailed information on what is and is not included in this review.

Cancel **Confirm and Install**

## Check-fleet Installation

1. Select "Install For All Users"
2. Click "Install"

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



### Install Check-fleet: Fleet Telematics for Field Service

By GPS Dashboard Inc.



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

**2**  
Install

Cancel

| App Name                                        | Publisher          | Version Name         | Version Number |
|-------------------------------------------------|--------------------|----------------------|----------------|
| Check-fleet: Fleet Telematics for Field Service | GPS Dashboard Inc. | Check-fleet Winter17 | 1.55           |

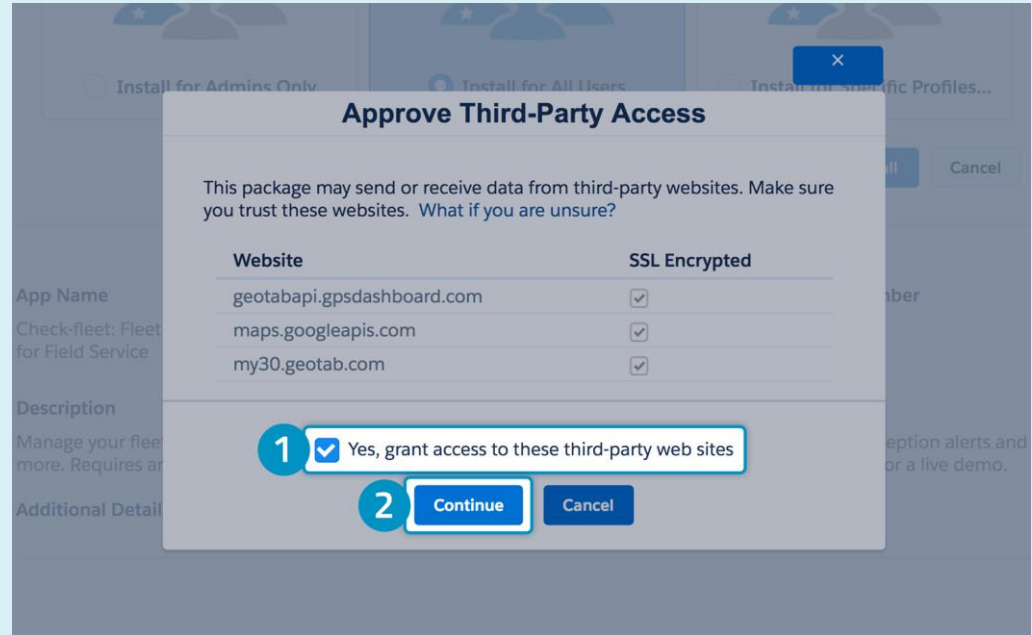
**Description**

Manage your fleet, track your vehicles in real time, improve productivity, monitor driver behavior, get exception alerts and more. Requires an in vehicle GPS Tracking device and subscription to Geotab service. Please contact us for a live demo.

[Additional Details](#) [View Components](#)

## Check-fleet Installation

1. Check the **"Yes"** Checkbox
2. Click **"Continue"**



# Check-fleet Installation

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

 **Installing and granting access to all Users...**

 **Install Check-fleet: Fleet Telematics for Field Service**  
By GPS Dashboard Inc.

1

 Installation Complete!

2

Done

| App Name                                        | Publisher          | Version Name         | Version Number |
|-------------------------------------------------|--------------------|----------------------|----------------|
| Check-fleet: Fleet Telematics for Field Service | GPS Dashboard Inc. | Check-fleet Winter17 | 1.55           |

**Description**

Manage your fleet, track your vehicles in real time, improve productivity, monitor driver behavior, get exception alerts and more. Requires an in vehicle GPS Tracking device and subscription to Geotab service. Please contact us for a live demo.

# Assign User Licenses

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, the navigation menu is expanded to 'Apps', and 'Installed Packages' is highlighted with a blue circle and the number '1'. In the main content area, the 'Installed Packages' section is displayed. A table lists installed packages, with the 'Check-fleet' package highlighted. A blue circle and the number '2' point to the 'Manage Licenses' link in the 'Action' column for this package.

| Action                                                    | Package Name                | Publisher           | Version Number | Namespace Prefix |
|-----------------------------------------------------------|-----------------------------|---------------------|----------------|------------------|
| <a href="#">Uninstall</a> <a href="#">Manage Licenses</a> | Check-fleet                 | GPS Dashboard, Inc. | 1.113          | chkfleet         |
| <a href="#">Uninstall</a>                                 | Salesforce and Chatter Apps | Salesforce.com      | 1.17           | sf_chttr_apps    |

Description: This package contains Connected Applications for the officially supported Salesforce apps for



## Assign User Licenses

Click “**Add Users**” to assign a Check-fleet 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 displays the 'Package Manager' interface for 'Check-fleet'. It includes a 'Package Details' section with a table showing package information and a 'Licensed Users' section with a table of users and an 'Add Users' button.

**Package Manager**

Package Details  
Check-fleet  
[Back to Previous Page](#)

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

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#)

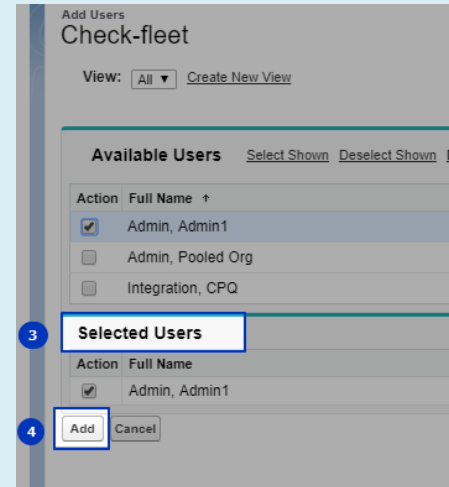
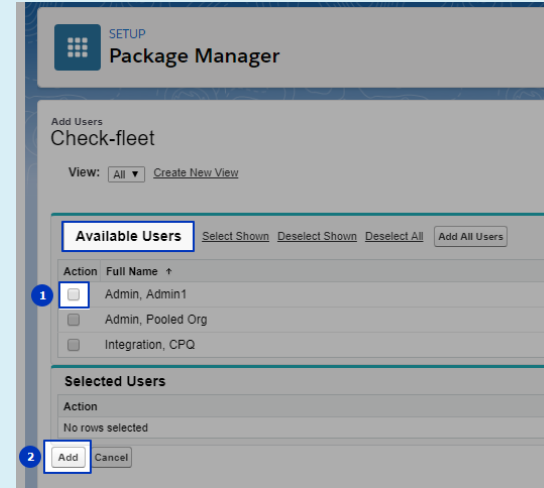
**Licensed Users** [Add Users](#) [Remove Multiple Users](#)

| Action                 | Full Name ↑ | Role | Active | Profile                              |
|------------------------|-------------|------|--------|--------------------------------------|
| <a href="#">Remove</a> | [Redacted]  |      | ✓      | <a href="#">System Administrator</a> |

## Assign User Licenses

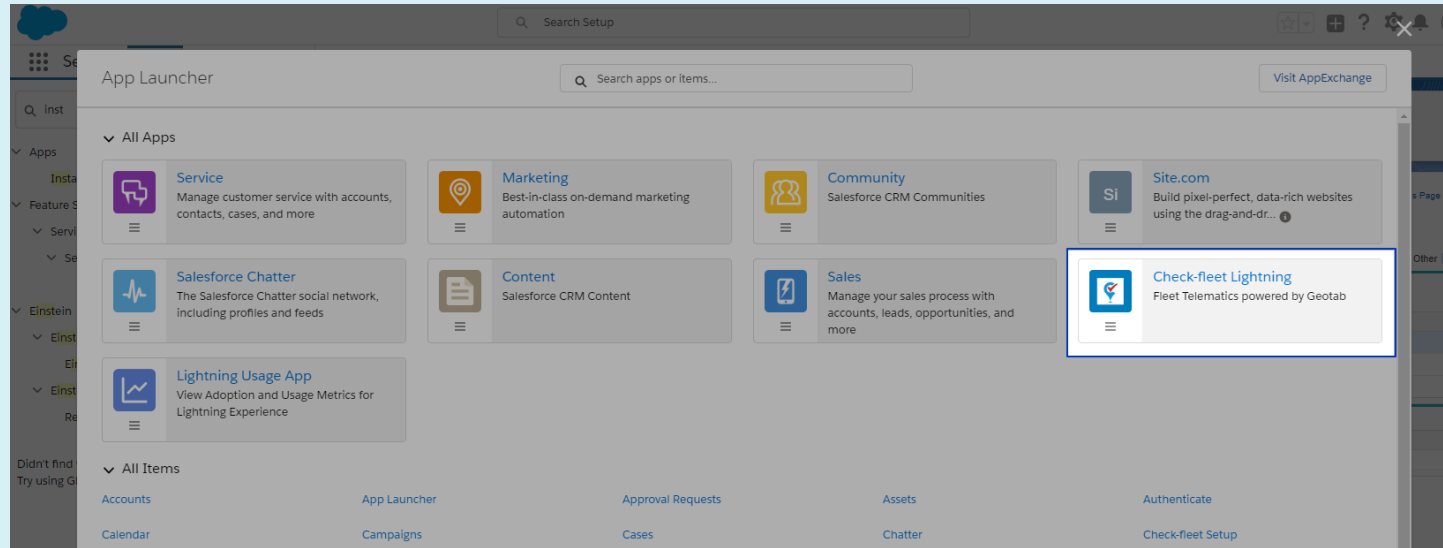
1. In section "**Available Users**", select one or more users.
2. Click "**Add**"
3. The selected User is added to the section "**Selected Users**"
4. Click "**Add**"

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



## Check-fleet Set-up

From App Menu  
click **Check-fleet  
Lightning**

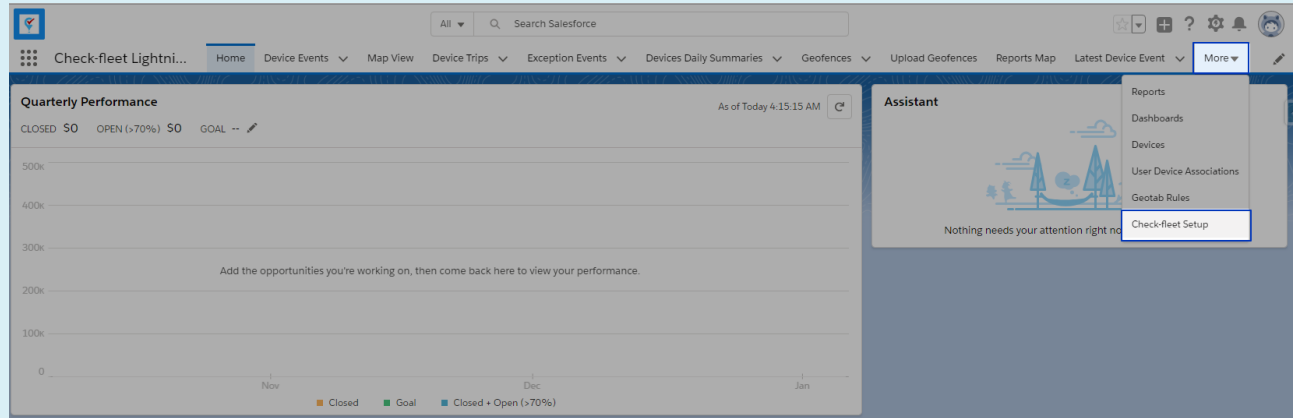


## Check-fleet Set-up

When the Check-fleet App is selected, the Check-fleet logo appears on top left, and custom tabs are displayed.

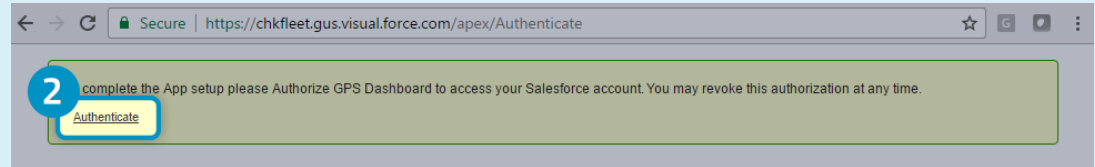
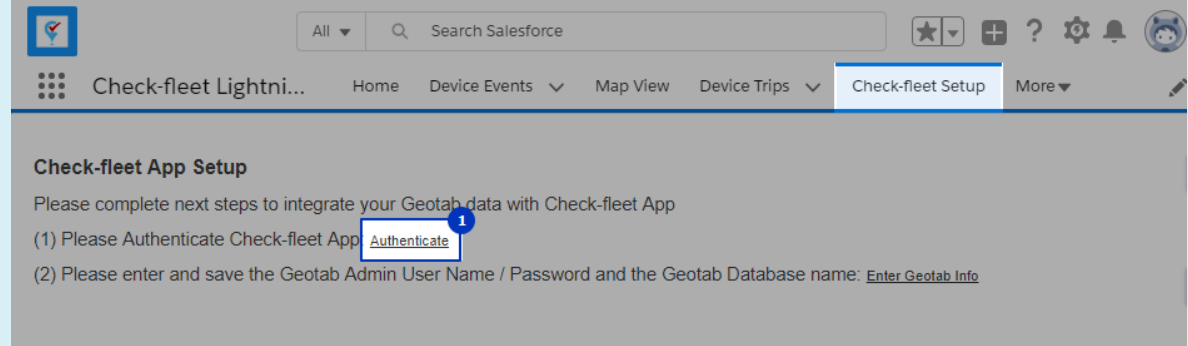
Click the **"Check-fleet Setup"** tab.

You may need to extend Check-fleet App Menu (drop down arrow) to view this tab.



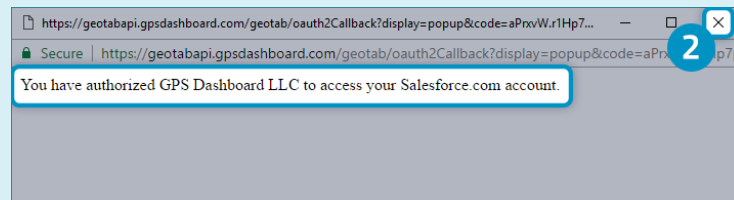
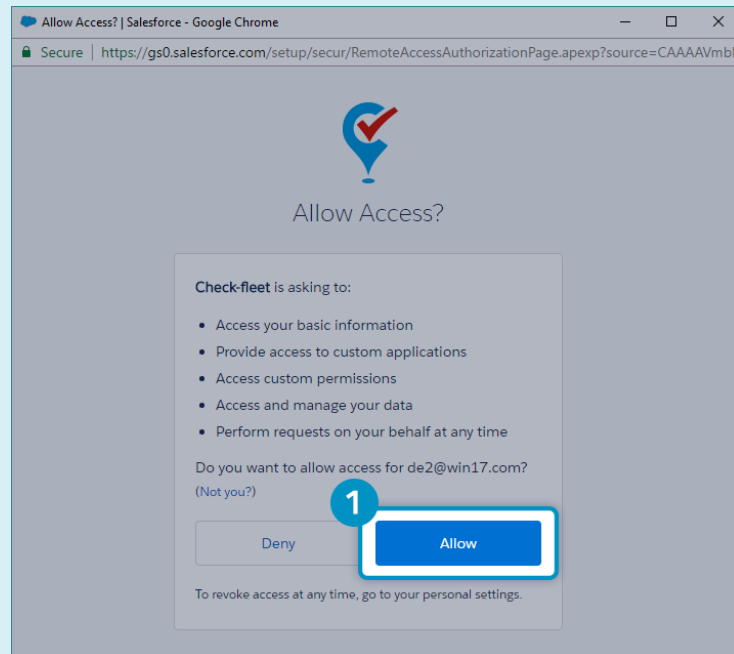
## Check-fleet Set-up

1. In "Check-fleet Setup" page, Step #1, click "Authenticate"
2. Click "Authenticate" link in yellow box



## Salesforce Authentication

1. A new separate window entitled "Allow Access?" is displayed. Click "**Allow**"  
**Note:** if you do not see the "Allow" button you may need to resize the window and extend the height
2. The message "You have authorized ..." will display, **close the window**
3. Click **Previous** to return to the Check-fleet Setup page



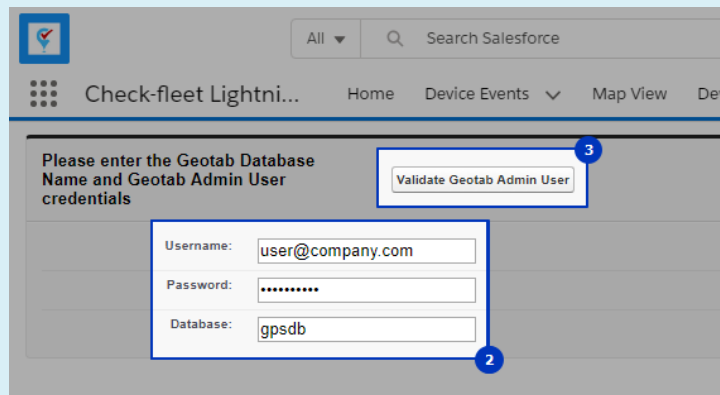
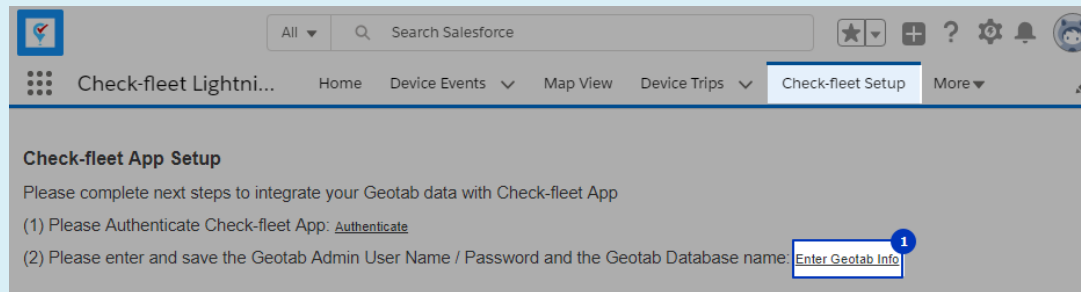
# Geotab Admin Authentication

1. Click **"Enter Geotab Info"**

2. Input the Geotab Admin **User Name, Password, & Database** name.

The Geotab User must have sufficient Geotab permissions to access all data to be imported to Check-fleet

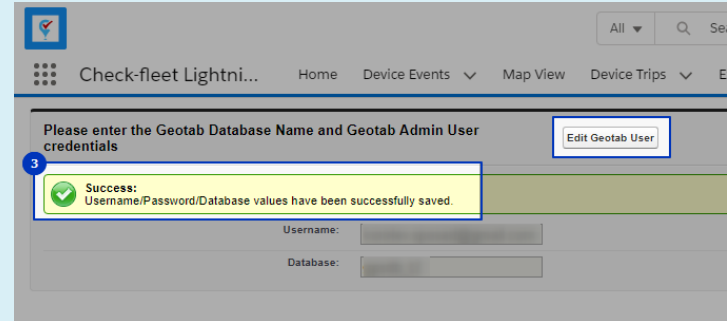
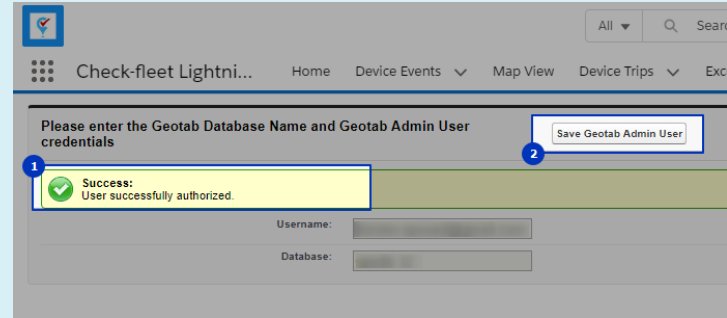
3. Click the **"Validate Geotab Admin User"**



## Geotab Admin Authentication

1. If validated, the message  
**"User successfully authorized"**  
will display
2. Click **"Save Geotab Admin User"**
3. Ensure **"Success..."** message  
is displayed

✳ **Note:** To update the Admin credentials previously saved in Salesforce click  
**"Edit Geotab User"**





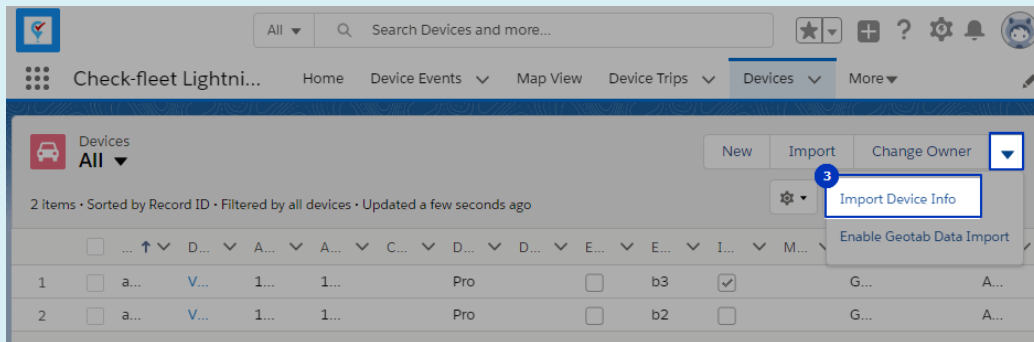
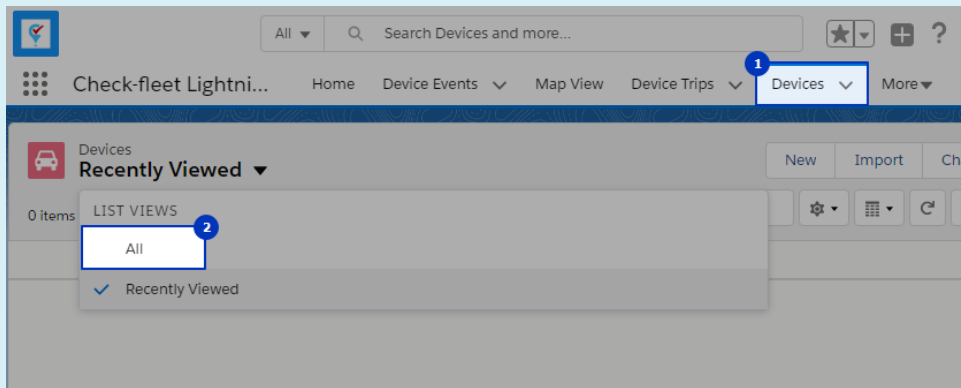
## Device Set-up

Within 2 hours of completing the authentication, outlined in slides 14-16, devices will auto-sync with your MyGeotab database.

To view the devices:

1. Click "**Devices**" tab
2. Click "**All**" list view

Geotab is the "source-of-truth" and updates in MyGeotab will auto sync hourly.



# Activate Data Integration Rules to Geocode Account Addresses

1. Click **"Setup"**
2. Click **"Data Integration Rules"**
3. Data Integration Rules are displayed

The screenshot shows the GPS Dashboard interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present on the right. The left sidebar shows a search for 'integration' with results for 'Data Integration Metrics' and 'Data Integration Rules'. The 'Data Integration Rules' link is highlighted with a blue box and a circled '1'. The main content area is titled 'SETUP Data Integration Rules' and displays a table of rules. A circled '2' is placed over the table. The table has columns for Name, Data Service, Description, and Object.

| Name ↑                                                | Data Service | Description                        | Object  |
|-------------------------------------------------------|--------------|------------------------------------|---------|
| <a href="#">Geocodes for Account Billing Address</a>  | Data.com Geo | Adds geocodes for Billing Address  | Account |
| <a href="#">Geocodes for Account Shipping Address</a> | Data.com Geo | Adds geocodes for Shipping Address | Account |
| <a href="#">Geocodes for Contact Mailing Address</a>  | Data.com Geo | Adds geocodes for Mailing Address  | Contact |
| <a href="#">Geocodes for Lead Address</a>             | Data.com Geo | Adds geocodes for Address          | Lead    |

# Activate Data Integration Rules

1. Click rule name **"Geocodes for Account Billing Address"**

2. Click **"Activate"** button

**Note:** Repeat for other Addresses if desired: Account Shipping, Lead, and Contact

All Data Integration Rules

What Are Data Integration Rules?

View: All Data Integration Rules ▾ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K

| Name ↑                                                | Data Service | Description                        |
|-------------------------------------------------------|--------------|------------------------------------|
| <a href="#">Geocodes for Account Billing Address</a>  | Data.com Geo | Adds geocodes for Billing Address  |
| <a href="#">Geocodes for Account Shipping Address</a> | Data.com Geo | Adds geocodes for Shipping Address |
| <a href="#">Geocodes for Contact Mailing Address</a>  | Data.com Geo | Adds geocodes for Mailing Address  |
| <a href="#">Geocodes for Lead Address</a>             | Data.com Geo | Adds geocodes for Address          |

Account Data Integration Rule

## Geocodes for Account Billing Address

[« Back to List: Data Integration Rules](#)

**Data Integration Rules** Edit Rule Settings Edit Field Mapping **2** Activate

|                                                                        |                                      |
|------------------------------------------------------------------------|--------------------------------------|
| Name                                                                   | Geocodes for Account Billing Address |
| Description                                                            | Adds geocodes for Billing Address    |
| Object                                                                 | Account                              |
| Data Service                                                           | Data.com Geo                         |
| Update all records after this rule is activated or saved (recommended) | ✓                                    |
| Bypass Triggers                                                        | ✓                                    |
| Bypass Workflow Rules                                                  | ✓                                    |
| Leave last-modified information unchanged                              | ✓                                    |
| Current Status                                                         | Active - Enrichment                  |
| Created By                                                             | Automated Process, 6/25/2016 9:31 AM |
| Modified By                                                            | Amin Mufti, 3/31/2017 12:53 PM       |

# Geofence Config

Config of this feature is located in *Setup > Develop > Custom Metadata Types*

| New Custom Metadata Type       |                                 |                             |                  |            |                                |
|--------------------------------|---------------------------------|-----------------------------|------------------|------------|--------------------------------|
| Action                         | Label                           | Installed Package           | Namespace Prefix | Visibility | Api Name                       |
| <a href="#">Manage Records</a> | <a href="#">Geofence Config</a> | <a href="#">Check-fleet</a> | chkfleet         | Public     | chkfleet__Geofence_Config__mdt |

Click **"Manage Records"** to edit parameters

## Geofence Config (Managed)

[« Back to List: Geofence Configs](#)

This Geofence Config is managed, meaning that you m

### Geofence Config Detail

[Edit](#) [Clone](#)

|                                      |                       |         |
|--------------------------------------|-----------------------|---------|
| 2                                    | Label                 | Account |
| Geofence Config Name                 | Account               |         |
| Checkbox API Name To Create Geofence | Is_Create_Geofence__c |         |
| Latitude API Field Name              | BillingLatitude       |         |
| Longitude API Field Name             | BillingLongitude      |         |
| Look Up API Name                     | Account__c            |         |
| sObject API Name                     | Account               |         |

## Geofence Config

You can change default BillingLatitude and BillingLongitude to ShippingLatitude and ShippingLongitude or other fields that contain the account Geolocation.

The values saved in the metadata is then used when creating a Geofence from an Account.

### Geofence Config (Managed)



This Geofence Config is managed, meaning that you may only e

#### Geofence Config Edit

Save

Save & New

Cancel

#### Information

Label Account

Geofence Config Name Account

Name

Checkbox API Name To Create Geofence Is\_Create\_Geofence\_\_c

Latitude API Field Name BillingLatitude

Longitude API Field Name BillingLongitude

Look Up API Name Account\_\_c

sObject API Name Account

## Geofence Config

You can replace the value of Checkbox "Is\_create\_Geofence\_c" to any other checkbox field.

Geofence is auto created if this checkbox is set = **TRUE** on the account page.

### Geofence Config (Managed)



This Geofence Config is managed, meaning that you may only e

#### Geofence Config Edit

Save

Save & New

Cancel

#### Information

Label Account

Geofence Config Name Account



Name

Checkbox API Name To Create Geofence Is\_Create\_Geofence\_\_c

Latitude API Field Name BillingLatitude

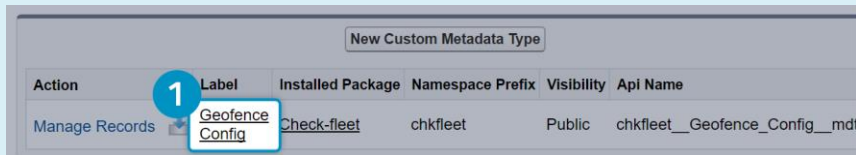
Longitude API Field Name BillingLongitude

Look Up API Name Account\_\_c

sObject API Name Account

# Geofence Config

Config of this feature is located in *Setup > Develop > Custom Metadata Types*

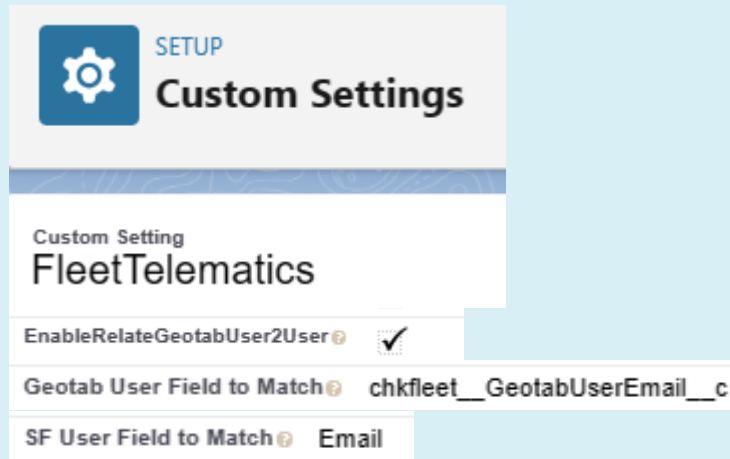


1. Click "**Geofence Config**" to open current config
2. Click "**new**" button if you need to add new parameter to existing config

| Action | Field Label                                          | API Name                                          | Installed Package           | Data Type |
|--------|------------------------------------------------------|---------------------------------------------------|-----------------------------|-----------|
| Edit   | <a href="#">Checkbox API Name To Create Geofence</a> | chkfleet__Checkbox_API_Name_To_Create_Geofence__c | <a href="#">Check-fleet</a> | Text(100) |
| Edit   | <a href="#">Latitude API Field Name</a>              | chkfleet__Latitude_API_Field_Name__c              | <a href="#">Check-fleet</a> | Text(255) |
| Edit   | <a href="#">Longitude API Field Name</a>             | chkfleet__Longitude_API_Field_Name__c             | <a href="#">Check-fleet</a> | Text(255) |
| Edit   | <a href="#">Look Up API Name</a>                     | chkfleet__Look_Up_API_Name__c                     | <a href="#">Check-fleet</a> | Text(20)  |
| Edit   | <a href="#">sObject API Name</a>                     | chkfleet__sObject_API_Name__c                     | <a href="#">Check-fleet</a> | Text(200) |

# Auto-Sync Geotab User (Driver) to a Salesforce User

- ▶ An external webservice auto-syncs Geotab Users, typically drivers, with Salesforce Users.
- ▶ Once the checkbox is enabled, the sync matches fields defined in the Custom Setting "FleetTelematics":
  - "Geotab User Field To Match": a Field on the Device Driver Assignment object. Typically, the Geotab User's Email
  - "SF User Field To Match": a Field on the Salesforce Object, typically the "Email".



*Note: To support implementation in Salesforce Sandboxes, a Geotab User's email [myname@mycompany.com](mailto:myname@mycompany.com) will match both emails of a SF User [myname@mycompany.com](mailto:myname@mycompany.com) and [myname@mycompany.com.invalid](mailto:myname@mycompany.com.invalid)*



## Auto-Sync Geotab User (Driver) to a Salesforce User (continued)

A change in Geotab of the Device to Driver assignment will result in an update to the User Device Associations records in Salesforce: new records are added and existing records may be de-activated (status set to Not Active).

In Geotab a supervisor may change the driver assigned to a device or a driver using the Geotab Drive Mobile App may self-assign themselves to a device, for example when completing a Driver Vehicle Inspection Report (DVIR), or ELS status update.

| User Device Associations                                                                                                                                                         |                                                         |                    |                    |            |                 |                                     | New                                              | Import | C |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|--------------------|--------------------|------------|-----------------|-------------------------------------|--------------------------------------------------|--------|---|
|  <b>All</b> ▼  |                                                         |                    |                    |            |                 |                                     |                                                  |        |   |
| 30 items • Sorted by Status Active (Based on Active From/To) • Filtered by All user device associations • Updated a few seconds ago                                              |                                                         |                    |                    |            |                 |                                     | <input type="text" value="Search this list..."/> |        |   |
|                                                                                                                                                                                  | <input type="checkbox"/> User Device Association N... ▼ | ActiveFrom ▼       | ActiveTo ▼         | Device ▼   | User ▼          | Status Active (B                    |                                                  |        |   |
| 1                                                                                                                                                                                | <input type="checkbox"/> Vehicle 7 Jane Supervisor      | 3/16/2024, 8:00 PM | 3/16/2074, 8:00 PM | Vehicle 7  | Jane Supervisor | <input checked="" type="checkbox"/> |                                                  |        |   |
| 2                                                                                                                                                                                | <input type="checkbox"/> Vehicle 6 Amin Mufti           | 3/16/2024, 8:00 PM | 3/16/2074, 8:00 PM | Vehicle 6  | Amin Mufti      | <input checked="" type="checkbox"/> |                                                  |        |   |
| 3                                                                                                                                                                                | <input type="checkbox"/> Vehicle 11 CS1                 | 3/16/2024, 8:00 PM | 3/16/2074, 8:00 PM | Vehicle 11 | CS1             | <input checked="" type="checkbox"/> |                                                  |        |   |
| 4                                                                                                                                                                                | <input type="checkbox"/> Vehicle 11 CS1                 | 3/15/2024, 8:00 PM | 3/16/2024, 8:00 PM | Vehicle 11 | CS1             | <input type="checkbox"/>            |                                                  |        |   |
| 5                                                                                                                                                                                | <input type="checkbox"/> Vehicle 10 CS1                 | 3/15/2024, 8:00 PM | 3/14/2024, 8:00 PM | Vehicle 10 | CS1             | <input type="checkbox"/>            |                                                  |        |   |

## Rules & Real Time Notifications

Rule Exceptions maybe uploaded to Check-fleet / Salesforce in near real-time.

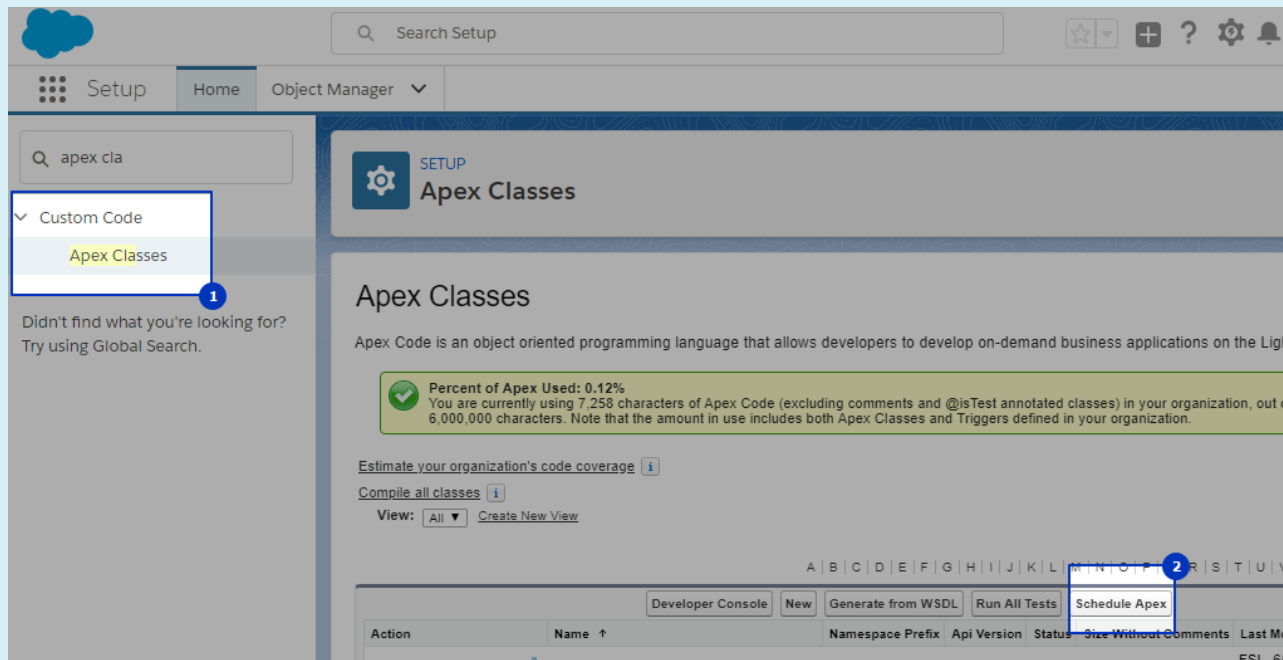
Please contact us to assist you in setting up a Notification Template in Geotab.

The screenshot shows the 'myGEOTAB' interface in a web browser. The left sidebar contains a menu with items: 'Getting Started & Help', 'Dashboard', 'Map', 'Vehicles', 'Activity', 'Engine & Maintenance', 'Zones & Messages', 'Rules & Groups' (which is expanded to show 'Rules', 'Exceptions', and 'Groups'), and 'Groups'. The main content area is titled 'Web Request Template Edit' and includes a 'Save' button and a 'Remove' button. The form fields are: 'Template Name' (GPSDB Webhook Production), 'URL' (https://geotabapi.yourcompany.com/geotab/webhook), 'HTTP Request Type' (GET and POST buttons, with POST selected), and 'Post Data' (a text area containing a JSON string: {\"Database\": \"Serial number\", \"Date\": \"Time\", \"Timezone\": \"Latitude\", \"Longitude\": \"Speed\", \"Rule\": \"Diagnostic\", \"Zone\": \"Address\"}). Below the form is a section titled 'AVAILABLE TOKENS' with a table of tokens and their descriptions.

| Token     | Description                                       |
|-----------|---------------------------------------------------|
| {Address} | The street address at time the exception occurred |

# Schedule job

1. Click **"Setup"**
2. Click **"Apex Classes"**
3. Click **"Schedule Apex"**



## Schedule job

1. Fill **Job Name**
2. Set **Apex Class** as  
"TrackingDeviceSummaryJob"
3. Select **Frequency** and **Time**
4. Click "Save"

### Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or

Save

Cancel

Job Name

Check-fleet 8PM

Apex Class

TrackingDeviceSummaryJob

Schedule Apex Execution

Frequency

☒ Weekly
 ☐ Monthly

Recurs every week on

☒ Sunday
 ☒ Monday
 ☒ Tuesday
 ☒ Wednesday
 ☒ Thursday
 ☒ Friday
 ☒ Saturday

Start

9/7/2017

[ 9/7/2017 ]

End

10/7/2017

[ 9/7/2017 ]

Preferred Start Time

8:00 PM

▼

Exact start time will depend on job queue activity.

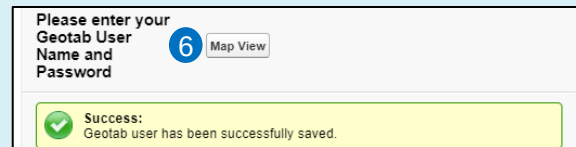
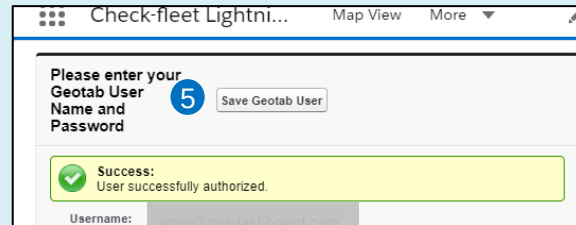
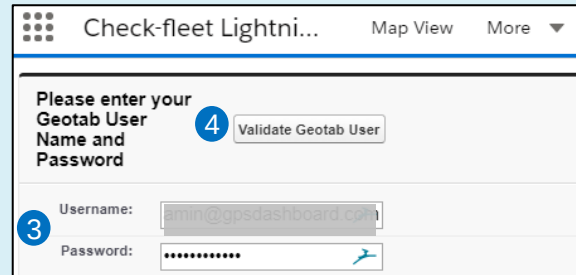
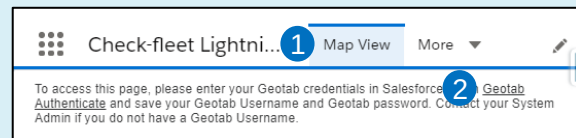
Save

Cancel

## Map View

One Time Setup by each User:

1. User clicks "Map View" tab
2. User clicks "[Geotab Authenticate](#)" link
3. Enters my.geotab.com Username & Password (NOT Salesforce.com)
4. Clicks Validate "Geotab User", if successful "User successfully Authorized"
5. Clicks "Save Geotab User", if successful "Geotab User has been successfully saved"
6. Clicks "Map View", pls see next slide



## Map View (continued)

### Select Devices

Note, a Device is listed:

1. If device checkbox field "Import Geotab Data" is checked.
2. Device Checkbox field "is Expired" is not checked.  
Note, formula field based on "Active To" date.

|   | <input type="checkbox"/> Device Name ↑ | Active From  | Active To            | <input type="checkbox"/> Import Geotab Data | <input type="checkbox"/> Expired    |
|---|----------------------------------------|--------------|----------------------|---------------------------------------------|-------------------------------------|
| 1 | <input type="checkbox"/> Amin Go 9     | 10/15/201... | 12/20/2019 10:17 ... | <input type="checkbox"/>                    | <input checked="" type="checkbox"/> |
| 2 | <input type="checkbox"/> Vehicle 1     | 3/1/2017 ... | 12/31/2049 4:00 PM   | <input checked="" type="checkbox"/>         | <input type="checkbox"/>            |
| 3 | <input type="checkbox"/> Vehicle 10    | 3/1/2017 ... | 12/31/2049 4:00 PM   | <input checked="" type="checkbox"/>         | <input type="checkbox"/>            |

## Map View (continued)

### Select Users

Note, a User is listed:

1. If a User is associated with a device by a record in User Device Association.
2. The field "Status Active (Based on Active From / To Dates)" must be checked.

User Device Associations

All

New

Import

Change Owner

5 items - Sorted by User Device Association Name - Filtered by all user device associations - Updated a few seconds ago

Q

Search this list...

|   | <div><div></div><div>User Device Associati...</div><div></div></div> | <div>ActiveFrom</div> | <div>ActiveTo</div> | <div>Device</div> | <div>User</div>   | <div>Status Active (Based</div> |
|---|----------------------------------------------------------------------|-----------------------|---------------------|-------------------|-------------------|---------------------------------|
| 1 | <div><div></div><div>Admin to Vehicle 14</div></div>                 | 12/17/2019 12:00 PM   | 12/11/2020 12:00 PM | Vehicle 14        | Check-fleet Admin | <div><div></div></div>          |
| 2 | <div><div></div><div>Tech 1 to Vehicle 6</div></div>                 | 9/1/2019 1:11 PM      | 10/1/2020 1:11 PM   | Vehicle 6         | Tech 1            | <div><div></div></div>          |
| 3 | <div><div></div><div>tech 3 to vehicle 11</div></div>                | 12/2/2019 12:00 PM    | 12/31/2022 12:00 PM | Vehicle 11        | Tech 3            | <div><div></div></div>          |
| 4 | <div><div></div><div>Test Admin 1 to Vehicle 8</div></div>           | 12/31/2018 10:08 AM   | 12/17/2021 10:08 AM | Vehicle 8         | Test Admin 1      | <div><div></div></div>          |
| 5 | <div><div></div><div>User 2 Vehicle 10</div></div>                   | 10/20/2019 10:10 AM   | 12/5/2030 12:00 AM  | Vehicle 10        | Tech 2            | <div><div></div></div>          |

## Copy Latest Location

1. Custom Setting "Fleet Telematics:  
Enable "Copy Latest Location".

**Custom Setting**  
**Fleet Telematics**

of data. For example, if your application had a setting for country  
aling code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want  
different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

[Edit](#) [Delete](#)

▼ Default Organization Level Value

|                                          |                                     |                          |                                     |
|------------------------------------------|-------------------------------------|--------------------------|-------------------------------------|
| Location                                 | <u>Check-fleet for FSL Demo</u>     | Convert Km/hr to Mph     | 0.62137119                          |
| Convert km to miles                      | 0.621364                            | DailySummary_MinDistance | 0.500                               |
| Enable Geofence Calculation on force.com | <input checked="" type="checkbox"/> | Enable Geofence Upload   | <input checked="" type="checkbox"/> |
| Enable Relate Trip To Notification Event | <input type="checkbox"/>            |                          |                                     |
| Geotab Database                          |                                     |                          |                                     |
| Search Radius in Miles                   | 5.000                               |                          |                                     |
| Enable Destination Geofence              | <input type="checkbox"/>            |                          |                                     |
| Relate Trip to Previous Geofence         | <input type="checkbox"/>            |                          |                                     |

**Geofence**

**Copy Latest Location** ☒

Copy Latest Location ☒

2. Custom Meta Data Type "Latest Location" :

- A. Manage Records:
- B. Add New Record

**All Custom Metadata Types**

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

[New Custom Metadata Type](#)

| Action                          | Label                           | Installed Package | Namespace Prefix | Visibility                    | API Name                       |
|---------------------------------|---------------------------------|-------------------|------------------|-------------------------------|--------------------------------|
| <a href="#">Manage Records</a>  | <a href="#">Geofence Config</a> | Check-fleet       | chkfleet         | Public                        | chkfleet__Geofence_Config__mdt |
| <a href="#">Latest Location</a> | <a href="#">Check-fleet</a>     | chkfleet          | Public           | chkfleet__latestLocation__mdt |                                |

**Latest Location**

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

**Latest Location Edit**

**Information**

Label

Latest Location Name

Device Location Latitude

Device Location Longitude

Device Lookup API

Location Date Time

Update Latest Location

Example, Update Salesforce Field Service: "Service Resource"

"Update Latest Location": ServiceResource (Object to be updated: API Name)

Fields to be updated (API Name):

LastKnownLatitude, LastKnownLongitude

LastKnownLocationDate, ChkFitFSL\_Device\_\_c



## Copy Latest Location (continued)

### Example, Update Salesforce Field Service: “Service Resource”

- The ServiceResource LastKnownLocation fields are auto-updated based on the location of the vehicle they are driving once every minute when the vehicle is moving. The Salesforce Field Service Gantt Map displays the Service Resource location.



Service Resource  
**Tech 2**

|                                                                                         |               |                                     |
|-----------------------------------------------------------------------------------------|---------------|-------------------------------------|
| User                                                                                    | Resource Type | Active                              |
|  Tech 2 | Technician    | <input checked="" type="checkbox"/> |

SR Geotab Last Known Location  
43.7612038 / -79.4694366 / 2022-01-29 19:13:09Z


Field Service

Home
Reports
Field Service
Accounts
Work Orders
Service Appointments
More

Policy: Customer First

All Service Appointments

Horizon: 01/28/2022

☐ Match Gantt Dates

No Service Appointments

Schedule
Dispatch

Search Service Appointment...

☐ APPOINTMEN... STATUS

EARLIEST START PERM...

GANTT
MAP

Map Layers
Traffic

Map
Satellite


TECH 2  
Last seen 1/29/2022 2:13 PM  
View Details

# Populate Destination Geofence (relate successive trips to a stop destination)

1. Custom Setting "Fleet Telematics": "Enable Destination Geofence"

Custom Setting  
FleetTelematics

Enable Destination Geofence 

2. Schedule Apex: "PopulateDestinationGeofenceJob"

*Schedule to run every day of the week, ideally after vehicles have come to a stop at end of day.*

**Schedule Apex**

Schedule an Apex class that implements the 'Scheduleable' interface to be periodically executed on a weekly or monthly interval.

Save Cancel

Job Name

Apex Class

Schedule Apex Execution

☒ Weekly ☐ Monthly

Recurs every week on

☒ Sunday

Apex Classes ~ Salesforce - Developer Edition - Google Chrome

fsi-checkfleetdemo1-dev-ed.my.salesforce.com/\_ui/common/data/LookupPage?lkfm=editPage&lkfm...

**Lookup**

You can use "\*" as a wildcard next to other characters to improve your search results.

| Name                                  | Namespace Prefix |
|---------------------------------------|------------------|
| <u>PopulateDestinationGeofenceJob</u> | chkfleet         |

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# Populate Destination Geofence (Continued)

Once the scheduled job executes, the Destination Geofence field is auto-populated as appropriate

Report: Device Trips with Device  
**Device Trips Today - DestinationGeofence**

A trip starts when a device starts moving, and ends when a vehicle starts moving again, that is the beginning of the next trip

| Device: D...   | TripDate ↑    | startTime          | stopTime           | nextTripStart      | Stop Geofence | Destination Geofence | Driving (Min) | Driving Distance (Miles) | Stop (Min) |
|----------------|---------------|--------------------|--------------------|--------------------|---------------|----------------------|---------------|--------------------------|------------|
| Vehicle 11 (8) | 1/28/2022 (8) | 1/28/2022 12:15 PM | 1/28/2022 12:36 PM | 1/28/2022 12:43 PM | -             | A - 220              | 20.27         | 6.001                    | 7.33       |
|                |               | 1/28/2022 12:43 PM | 1/28/2022 1:13 PM  | 1/28/2022 1:22 PM  | A - 220       | A - 220              | 29.55         | 14.310                   | 0.00       |
|                |               | 1/28/2022 7:57 AM  | 1/28/2022 8:08 AM  | 1/28/2022 8:34 AM  | -             | A - 822              | 11.32         | 2.830                    | 26.47      |
|                |               | 1/28/2022 10:29 AM | 1/28/2022 11:02 AM | 1/28/2022 11:31 AM | -             | A - 822              | 33.27         | 18.463                   | 28.72      |
|                |               | 1/28/2022 8:54 AM  | 1/28/2022 9:04 AM  | 1/28/2022 9:25 AM  | -             | A - 822              | 9.68          | 2.821                    | 21.48      |
|                |               | 1/28/2022 8:34 AM  | 1/28/2022 8:39 AM  | 1/28/2022 8:54 AM  | -             | A - 822              | 4.75          | 1.459                    | 14.92      |
|                |               | 1/28/2022 9:25 AM  | 1/28/2022 9:46 AM  | 1/28/2022 10:29 AM | -             | A - 822              | 20.52         | 3.477                    | 42.90      |
|                |               | 1/28/2022 11:31 AM | 1/28/2022 12:09 PM | 1/28/2022 12:15 PM | A - 822       | A - 822              | 38.63         | 22.825                   | 6.20       |

For each Device Trip (a row in the report):

- If column "A" Stop Geofence is NOT populated
- Column "B" Destination Geofence is auto-populated with the next available Stop Geofence

*if a vehicle makes multiple stops when travelling to a job, and the stops are not at Geofences, all intermediate stops are tagged to the destination job, thus driving duration and driving distance may be totaled for the job.*

## Relate Trip To Previous Geofence

Relate Trip(s) to home base at end of the day to the last job

Custom Setting "Fleet Telematics": "Relate Trip To Previous Geofence" (Requires "Populate Destination Geofence")

Custom Setting

FleetTelematics

Relate Trip to Previous Geofence

If Destination Geofence is implemented in this org, updates trips without a Stop @ Geofence, populates the Destination Geofence with preceding Stop @ Geofence.

Report: Device Trips with Device

Device Trip - Today w Destination Geo

| Device: Device Name | TripDate       | startTime          | stopTime           | nextTripStart      | Stop Geofence | Destination Geofence | Driving (Min) | Driving Distance (Miles) | Stop (Min) |
|---------------------|----------------|--------------------|--------------------|--------------------|---------------|----------------------|---------------|--------------------------|------------|
|                     | 1/28/2022 (12) | 1/28/2022 7:40 AM  | 1/28/2022 7:41 AM  | 1/28/2022 7:45 AM  | Home Base     | Home Base            | 1.22          | 0.008                    | 4.33       |
|                     |                | 1/28/2022 7:45 AM  | 1/28/2022 7:45 AM  | 1/28/2022 7:51 AM  | Home Base     | Home Base            | 0.28          | 0.022                    | 5.52       |
|                     |                | 1/28/2022 7:51 AM  | 1/28/2022 8:43 AM  | 1/28/2022 8:54 AM  | -             | Job ABC              | 51.75         | 10.289                   | 10.98      |
|                     |                | 1/28/2022 8:54 AM  | 1/28/2022 9:09 AM  | 1/28/2022 9:36 AM  | -             | Job ABC              | 15.17         | 1.946                    | 27.03      |
|                     |                | 1/28/2022 9:36 AM  | 1/28/2022 9:57 AM  | 1/28/2022 10:20 AM | -             | Job ABC              | 21.58         | 2.676                    | 22.38      |
|                     |                | 1/28/2022 10:20 AM | 1/28/2022 10:28 AM | 1/28/2022 10:35 AM | -             | Job ABC              | 8.07          | 1.077                    | 7.33       |
|                     |                | 1/28/2022 10:35 AM | 1/28/2022 10:43 AM | 1/28/2022 10:53 AM | -             | Job ABC              | 8.02          | 0.905                    | 9.80       |
|                     |                | 1/28/2022 10:53 AM | 1/28/2022 11:02 AM | 1/28/2022 11:15 AM | -             | Job ABC              | 8.73          | 1.857                    | 12.90      |
|                     |                | 1/28/2022 11:15 AM | 1/28/2022 11:19 AM | 1/28/2022 11:47 AM | -             | Job ABC              | 4.73          | 0.363                    | 27.53      |
|                     |                | 1/28/2022 11:47 AM | 1/28/2022 11:48 AM | 1/28/2022 11:53 AM | Job ABC       | Job ABC              | 0.60          | 0.023                    | 5.35       |
|                     |                | 1/28/2022 11:53 AM | 1/28/2022 12:07 PM | 1/28/2022 12:12 PM | -             | Job ABC              | 13.70         | 1.090                    | 4.95       |
|                     |                | 1/28/2022 12:12 PM | 1/28/2022 1:00 PM  | 1/28/2022 1:12 PM  | -             | Job ABC              | 48.65         | 9.271                    | 0.00       |