

CHECK-fleet

for

Salesforce Field Service (SFS)

Check-fleet Extension Package Version 1.18 (Prefix ChkXSFS)

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appexchange

Check-fleet for Salesforce Field Service (SFS) Overview

If you use SFS 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: Geotab LiveMap within Salesforce.

- 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 SFS Features:

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

- Geocode Service Appointment Addresses using Google Geocode API, or use 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

Geotab Devices & SFS Service Resources

- Auto Sync Devices With Geotab & Auto Assign to SFS Service Resources

Check-fleet Lightning

Devices ▾ Home Geofences ▾ Device Events ▾ Device Trips ▾

 **Geotab Devices** ▾ 

9 items • Sorted by Device Name • Filtered by All devices - Device Name • Updated a few seconds ago

	☐ Device Name ↑ ▾	Active From ▾	Active To ▾	Comment ▾	SerialNu... ▾	Vehicle
1	☐ Vehicle 10	3/1/2017, 10:40 AM	12/31/20...		G78D20D...	3BKJH
2	☐ Vehicle 11	3/1/2017, 10:40 AM	12/31/20...	Test - At ...	G70620D...	1FVAC
3	☐ Vehicle 12	3/1/2017, 10:40 AM	12/31/20...		G75320D...	01201
4	☐ Vehicle 15	3/1/2017, 10:40 AM	12/31/20...		G74820D...	1GTW
5	☐ Vehicle 19	3/1/2017, 10:40 AM	12/31/20...		G71520D...	2NKH

Field Service

Home Reports ▾ Field Service

 **Service Resources** ▾ 

All Service Resources ▾ 

2 items • Sorted by Name • Filtered by All service resources • Updated a few seconds ago

	☐ Name ↑ ▾	Device ▾	Resource... ▾
1	☐ Service Tech #1	Vehicle 7	Technician
2	☐ Service Tech #2	Vehicle 11	Technician

Optimized Routing with SR's Near Realtime Locations

Field Service

Policy: Customer First

Todo

Horizon: 02/11/2024

No Service Appointments

Schedule Dispatch

Search Service Appointment...

APPOINTMEN... STATUS EARLIEST START PERM

GANTT MAP

Search resources

February 4, 2024 - Sat, February 4, 2024

Utilization: 10%

Service Tech #1

Service Tech #2

► Emergency Routing based on current location of the Service Resource's Geotab Equipped vehicle.

► Display SRs (near realtime location) on SFS Map

Field Service

Policy: Customer First

Todo

Horizon: 02/11/2024

No Service Appointments

Schedule Dispatch

Search Service Appointment...

APPOINTMEN... STATUS EARLIEST START PERM

GANTT MAP

Map Layers

MARKERS SERVICE RESOURCES REPORTS POLYGONS

Search resources

Service Tech #2

Service Tech #1

Remove

Remove

Remove All

Geotab LiveMap in Salesforce

- ▶ Select 1 or more vehicles:
- ▶ Display the current location of the selected devices on the Geotab LiveMap within Salesforce. With Geotab ProPlus, the device icon moves in near realtime.
- ▶ Display the historic trips based on selected Dates.

The screenshot displays the Geotab LiveMap interface within a Salesforce environment. The top navigation bar includes links for 'Check-fleet Lightning', 'Home', 'Geofences', 'Device Events', 'Device Trips', and 'Map View'. The main map area shows a geographical view of the Greater Toronto Area, with various vehicle locations marked by icons. A search bar at the top of the map allows for finding assets by name, VIN, or serial number. On the left side, there is a sidebar with filters for 'Select Devices' and 'Select Users'. Below these, a list of vehicles is shown, including 'Vehicle 11' which is currently selected. Further down, date filters for 'From Date' and 'To Date' are set to '2/24/2024 8:47 AM'. At the bottom of the sidebar, there are buttons for 'Geotab Live' and 'Geotab Trips'. The right side of the interface features a panel titled '3 Assets' which lists details for 'Vehicle 11' and 'Vehicle 7'. For 'Vehicle 11', the driver is 'Amin Mufti' and the location is '130 N Queen St #2E4, Etobicoke, ON M8Z 2E4, Canada', with a status of '22h 40m' and '0 mph'. For 'Vehicle 7', the status is 'No driver assigned' and the location is the same, with a status of '22h 37m' and '0 mph'.

Overview: Plan vs. Actual

The screenshot displays the GPS Dashboard interface. On the left, a sidebar titled "Service Appoint..." shows a list of appointments. The main area features a map of Toronto with green lines representing planned routes and red lines representing actual vehicle stops. A pop-up window for appointment SA-0420 provides details: Account: A - ABC Foods Inc., Scheduled Start: 01/15/2018 09:20 AM, Scheduled End: 01/15/2018 09:30 AM, Duration (Min): 1.00, and Status: Scheduled. The bottom navigation bar includes options like "Vehicles on Premise (Br)", "Reports Map Search", "Account Visits by Week", "Plan vs Actual", and "Live Map".

Service Appointments List:

Appointment ID	Date	Time
SA-0418	1/15/2018	10:00
SA-0419	1/15/2018	1:00
SA-0420	1/15/2018	9:00
SA-0421	2/12/2018	2:00
SA-0422	2/12/2018	5:00

Appointment Details (SA-0420):

- Account: A - ABC Foods Inc.
- Scheduled Start: 01/15/2018 09:20 AM
- Scheduled End: 01/15/2018 09:30 AM
- Duration (Min): 1.00
- Status: Scheduled

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

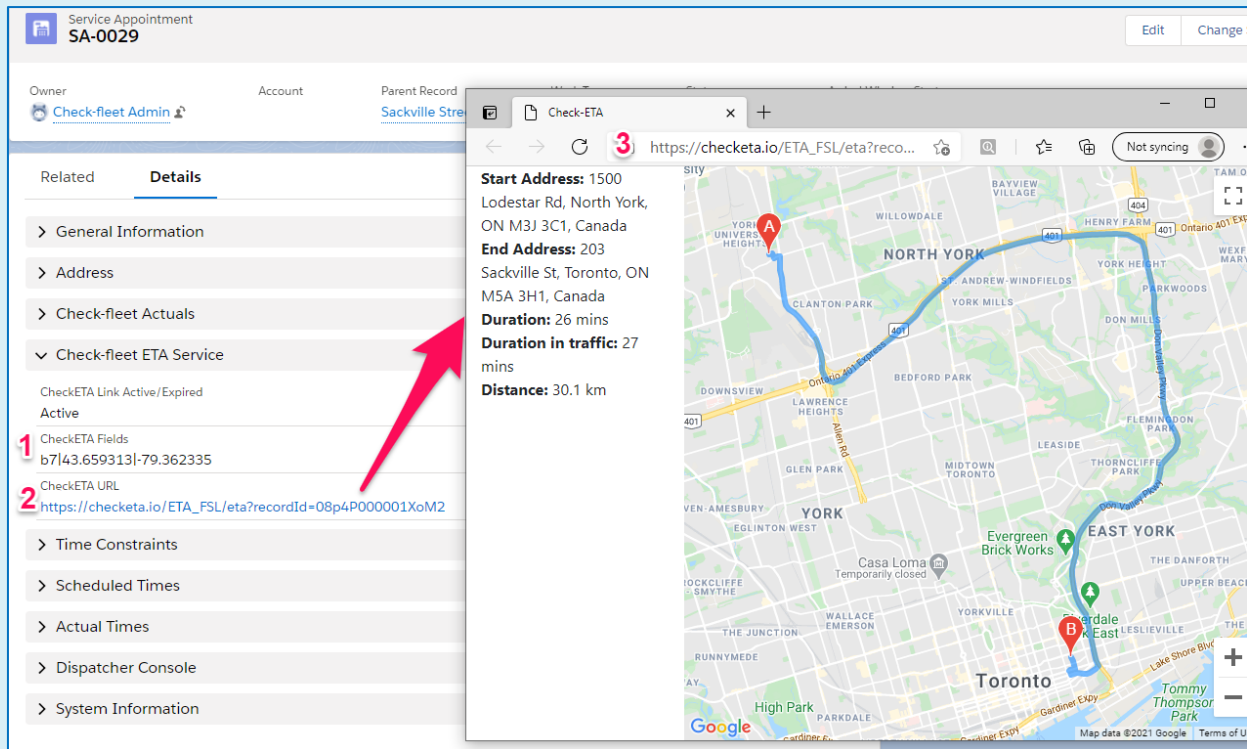
Service Appointment updated with total of all vehicle stops

Daily Summary & Timecard Validation

 Report: Devices Daily Summaries This Week Daily Summaries Enable Field Editing Search Add Chart Filter Refresh Edit											
Total Records	Total Number of GeoTrips	Total Stop Geo (Hrs)	Total Driving (Hrs)	Total Driving Distance (Miles)	Total Number of Trips	Total Stop (Hrs)					
14	68	14.30	35.21	564.453	149	31.61					
Device ↑	Date ↑	First Start	First Stop at Geo	Last Start at Geo	Last Stop	Number of GeoTrips	Stop Geo (Hrs)	Driving (Hrs)	Driving Distance (Miles)	Number of Trips	Stop (Hrs)
Vehicle 11 (6)	5/6/2024 (1)	5/6/2024, 7:15 AM	5/6/2024, 8:44 AM	5/6/2024, 10:22 AM	5/6/2024, 1:42 PM	4	0.80	3.42	65.182	11	2.22
	5/7/2024 (1)	5/7/2024, 7:36 AM	5/7/2024, 8:09 AM	5/7/2024, 8:32 AM	5/7/2024, 12:42 PM	1	0.39	1.99	29.067	10	2.71
	5/8/2024 (1)	5/8/2024, 5:49 AM	5/8/2024, 8:43 AM	5/8/2024, 11:59 AM	5/8/2024, 12:57 PM	5	0.67	3.25	64.291	12	3.21
	5/9/2024 (1)	5/9/2024, 7:55 AM	5/9/2024, 8:45 AM	5/9/2024, 12:35 PM	5/9/2024, 3:31 PM	2	0.55	3.43	57.611	11	3.61
	5/10/2024 (1)	5/10/2024, 7:43 AM	5/10/2024, 9:38 AM	5/10/2024, 11:27 AM	5/10/2024, 1:20 PM	3	0.84	2.50	45.419	11	2.27
	5/11/2024 (1)	5/11/2024, 9:14 AM	-	-	5/11/2024, 9:30 AM	-	0.00	0.05	0.096	2	0.22

- ▶ Time of First Movement, First Arrival @ SA, Last Departure From SA, Time of Last Stop
- ▶ Daily Summary: # of Stops and # of Stops @ SA
- ▶ Daily Summary: Distance Travelled, Driving Duration (Windshield Time), Idle Duration

ETA for Field Service: Share ETA link with Customers



The screenshot displays the GPS Dashboard interface for a service appointment. On the left, a sidebar shows the appointment details for 'SA-0029'. The 'Details' tab is active, and a red arrow points to the 'CheckETA URL' field, which contains the link: https://checketa.io/ETA_FSL/eta?recordId=08p4P000001XoM2. The main content area shows a map of Toronto with a blue route from point A to point B. The route starts at 'Start Address: 1500 Lodestar Rd, North York, ON M3J 3C1, Canada' and ends at 'End Address: 203 Sackville St, Toronto, ON M5A 3H1, Canada'. The route duration is 26 minutes, and the distance is 30.1 km. The map shows the route passing through North York and East York, with landmarks like Casa Loma and Evergreen Brick Works visible.

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: b7f43.6593131-79.362335
 - CheckETA URL: https://checketa.io/ETA_FSL/eta?recordId=08p4P000001XoM2
- Time Constraints
- Scheduled Times
- Actual Times
- Dispatcher Console
- System Information

CheckETA

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 data ©2021 Google