

CHECK-fleet

for

Salesforce Field Service (FS)

Step by Step Setup Guide

Check-fleet Extension Package Version 1.110 (Prefix ChkXSFS)

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appexchange

Install Check-fleet & Extension Package for Salesforce Field Service

► Install Packages

Package Name	Version	Link (test.salesforce.com for sbx installation)
Check-fleet	1.218	login.salesforce.com/packaging/installPackage.apexp?p0=04t1K00000037ToB
Check-fleet for SFS	1.110	login.salesforce.com/packaging/installPackage.apexp?p0=04tDn000000GSsg

Service Appointment: Add 3 Custom Fields

Datatype	Label	Name	Values/Formula
Formula *	CheckETA Link Active/Expired	ETA_Link_Status	IF(OR(ISPICKVAL(Status,'Scheduled'),ISPICKVAL(Status,'Dispatched'),ISPICKVAL(Status,'In Progress')),'Active',IF(OR(ISPICKVAL(Status,'Cannot Complete'),ISPICKVAL(Status,'Completed'),ISPICKVAL(Status,'Canceled')), 'Expired', NULL))

Note: Customized based on an Org's SA Status picklist values

Service Appointment: Add 3 Custom Fields *(continued)*

Datatype	Label	Name	Values/Formula
Formula	CheckETA Fields	CheckETA_Fields	IF((ETA_Link_Status__c) = "Expired", " ", ChkXSFS__ServiceResource__r.ChkXSFS__Device__r.chkfleet__ExternalID__c & " " & TEXT(Latitude) & " " & TEXT(Longitude))
Formula *	CheckETA Fields	CheckETA_URL	"https://checketa.io/MyCompany/eta?recordId="&Id

*Note: Replace **MyCompany** in the formula above with text provided by GPS Dashboard.*

Service Appointment Page Layout: Add 3 Sections

Check-fleet Setup & ETA Fields			
	SchedStartDate	10/12/2023	
	Service Resource	<u>Sample Text</u>	
Check-fleet ETA Fields			
	CheckETALink Active/Expired	Sample Text	
	CheckETAFields	Sample Text	
	CheckETAURL	Sample Text	
Check-fleet Actuals			
Resource Within Radius		☒	
SA Vehicle ArrivalTime		10/12/2023 1:42 PM	
Vehicle Arrival Time		10/12/2023 1:42 PM	
Vehicle Departure Time		10/12/2023 1:42 PM	
	Vehicle Stop Duration (Min)	9,090.2	
Resource Departed SA		☒	
		Total Driving Durations (Min)	215.08
		Total Idling Durations (Min)	907.72
		Total Travel Distance (Miles)	747.76
		Total Visit Durations (Min)	979.83

Note:

Add all or a subset of the custom fields, per screenshot.

Two of the sections are on the SA Page Layout “Check-fleet Service Appointment Layout” included in the managed package.

The 3 ETA fields are created after the package is installed.

Service Resource: Add 2 Custom Fields

Datatype	Label	Name	Values/Formula
Formula	Last Known Location	LastKnownLocation__c	TEXT(LastKnownLatitude) & " / " & TEXT(LastKnownLongitude) & " / " & TEXT (LastKnownLocationDate)
Formula	Geotab LiveMap	GeotabLiveMap	ChkXSFS__Device__r.chkfleet__Geotab_New__c

Notes:

“LastKnownLocation”: pls see CMDT LatestLocation. Displays the SR’s “Last Known Location” and should update if enabled and the SR’s assigned Geotab device is moving.

“Geotab LiveMap”: Launches the Geotab LiveMap centered around the SR’s Assigned Device.

Service Resource Page Layout: Add 4 Custom Fields

Check-fleet	
Device	<u>Sample Text</u>
 Geotab LiveMap	Sample Text
 SR Trips Map	Sample Text
 Last Known Location	Sample Text

Note:

2 fields are created after the package is installed.

Geofence Page Layout

Geofence Setup Details			
		Geofence Name	Sample Text
		Service Appointment	<u>Sample Text</u>
		Geolocation	Sample Text
		Geofence Radius	22,792
		Geofence Radius Miles	0.092785
		Active From	10/12/2023
		Active To	10/12/2023
		Is Active	☒
		StartStopGeo	☒
Totals of Related Geotab Device Trips			
		Total Trip Count	10,194
		Total Visit Duration (Hrs)	727.00
		Total Travel Distance (Miles)	811.65
		Total Driving Duration(Hrs)	672.41
		Total Idling Duration (Hrs)	353.04

Note: assign page layout "Geofence for Salesforce Field Service with Related Trips Totals" included with the package.

Custom Setting: FleetTelematics

Custom Setting

FleetTelematics

▼ Default Organization Level Value			
Location	ChkFit74	Convert Liters to Gallons	0.2641720524
Convert Km/hr to Mi/hr	0.62137119	Convert km to miles	0.621364
DailySummary_MinDistance	0.500	Default Device Owner	Id Org specific
Driver Change	Driver Change	Enable Destination Geofence	
Enable Geofence Calculation on force.com	☐	Enable Geofence Upload	☒
EnableRelateGeotabUser2User	☐	Enable Geocode on Geofence	☐
Enable Relate Trip To Notification Event	☐	Event Days to Delete	30
Device Event Reasons	logRecord,DeviceStatusInfo	GeotabRemoteURL	
Geotab Database		Convert Meters To Miles	0.000621364
Relate Trip to Previous Geofence	☐	Search Radius in Miles	5.000
Unit	mi	Copy Latest Location	☐

Custom Metadata Type: Latest Location (chkfleet__latestLocation__mdt)


SETUP
Custom Metadata Types

Latest Location

Latest Location Detail

Edit
D

Label	Service Resource
Latest Location Name	ServiceResource
Device Location Latitude	LastKnownLatitude
Device Location Longitude	LastKnownLongitude
Device Lookup API	ChkXSFS__Device__c
Location Date Time	LastKnownLocationDate
Update Latest Location ?	ServiceResource
SOQL Where Condition	Owner.IsActive = true

CMDT Record to be CREATED Post Install (references Custom Field “ChkXSFS__Device__c” included in Extension Package).

Custom Metadata Type: Resource Within Radius (ChkXSFS__SRInRadius__mdt)

▼ Enable Trigger Service Resource (SR) in Proximity of Service Appointment (SA)	
EnableSRWithinRadius	☒
▼ SA API Field Names For Address Lat & Long for Distance Calculation	
Latitude	Latitude
Longitude	Longitude
▼ Trigger Enabled if SA Status or Category Match Saved Values	
Status or Equivalent	Status
Status Field Values	Dispatched
▼ Trigger Disabled If Vehicle Arrival Time at SA is Populated	
SA VehicleArrivalTimeAtSA	ChkXSFS__SA_Vehicle_ArrivalTime__c
▼ SA Conditions: Time Prior to Or After Scheduled Start / End Times	
Minutes Before Start Time	90
Minutes After StartTime	240
▼ Maximum SR Distance From Service Appointment Lat & Long	
Radius In Miles	5.0
▼ Optional If Conditions Met SA Status Updated To This Value	
SA Status Within Radius	In Progress

Custom Metadata Type: Resource Departed SA (ChkXSFS__SRDepartedSA__mdt)

▼ 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 In Progress

Custom Metadata Type: Geofence for SA (ChkXSFS__Geofence_For_Service_Appointment__mdt)

Geofence For Service Appointment Detail

EditClone

Label	Default Geofence Values
Geofence For Service Appointment Name	Default_Geofence_Values

▼ 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 Create Geofence Checkbox ☒

SA Field To Create Geofence	Status
SA Field Values To Create Geofence	Dispatched

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

Geofence Latitude	latitude
Geofence Longitude	longitude
Geofence Radius (Meters)	300

Custom Metadata Type: Geofence for SA (Continued)

▼ Geofence Active From Date = SA Scheduled Start & Active To = SA Scheduled End	
Geofence Active Period (Days)	"The Geofence Active From Dates and Active To Dates are set based on the Service Appointment 'Scheduled Start Date'. An adjustment is applied so the Active From is set to X days prior to the Scheduled Start Date, the default is 0. If set to "-1" the Active From date is set to 1 day prior to the Scheduled Start Date. The Active To is set to X days after the Scheduled End Date, the default is 2. The Geofence Active To Date cannot be the same as the Scheduled End Date."
Geofence Dates Use SA Dates?	☒
Adjust Geofence Active From	0
Adjust Geofence Active To Date	1
▼ If "Geofence Dates Use SA Dates" Not Checked: Geofence Active From = Today()	
Geofence Active Duration (Days)	7
▼ Restrict Geofence to SR Assigned to the SA	
Enable UserDevice Trigger?	☒
Enable Assigned Resource Trigger	☒
Enable SA2SR Trigger?	☒
SA Status for SA2SR	Scheduled
SA Assigned SR?	

Custom Metadata Type: Geofence for SA (Continued)

▼ 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	Completed, Canceled, Cannot Complete

One Time Setup Tasks

Setup Tasks: Assign Permission Set to Users

1. Assign Permission Set “Check-fleet SFS Integration” to User Profiles
2. Clone & Add Permissions OR Create NEW Permission Set (Due to Managed Package Permission Set Limitations) :
 - a) System Permission: “Customize Application” (required to access C Settings & CMDT)

Customize Application



Customize the organization using App Setup menu options.

- b) Read, Update: Service Resource Object
- c) Read, Update: Service Appointment Object
- d) Read: Custom Fields Created Post Install on Service Appointment

One Time Setup Tasks: Assign App Licenses to Users (n/a in sandbox)

Setup > Installed Packages

Assign App Licenses to Users:

“Check-fleet”

“Check-fleet Ext for SFS”

Installed Packages									
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses		
Uninstall Manage Licenses	FSL	Salesforce	244.0.66	FSL	Active	Unlimited	0		
Uninstall Manage Licenses	Check-fleet	GPS Dashboard, Inc.	1.215	chkfleet	Trial	10	1		
Uninstall Manage Licenses	Check-fleet Ext for SFS (ChkXSFS)	Check-fleet Ext for SFS ChkXSFS	1.108	ChkXSFS	Active	10	1		

Package Details

Check-fleet

[Back to Previous Page](#)

[Enable for Platform Integrations](#)

Package Name	Check-fleet	Publisher	GPS Dashboard, Inc.
Status	Trial	Allowed Licenses	10
Expiration Date	10/28/2023	Used Licenses	1
Enabled for Platform Integrations	☐		

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X

Licensed Users

[Add Users](#)

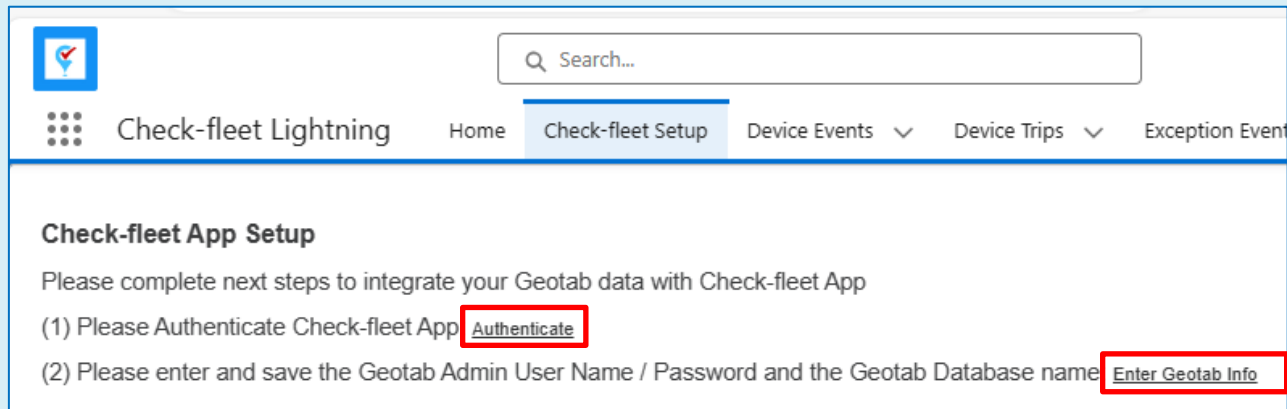
[Remove Multiple Users](#)

Action	Full Name ↑	Role	Active	Profile
Remove	Smith, Mary		☒	System Administrator

One Time Setup Tasks: Authenticate & Geotab Admin Credentials

“Check-fleet Setup” Tab:

- Authenticate



Check-fleet App Setup

Please complete next steps to integrate your Geotab data with Check-fleet App

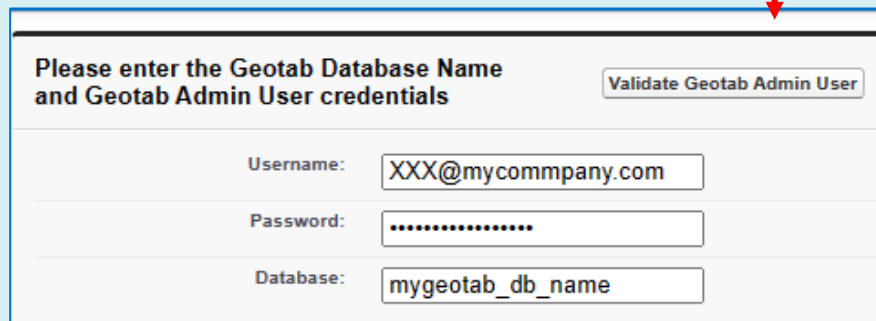
(1) Please Authenticate Check-fleet App [Authenticate](#)

(2) Please enter and save the Geotab Admin User Name / Password and the Geotab Database name [Enter Geotab Info](#)

- Enter, Validate, **Save** MyGeotab Admin Credentials

NOTE:

The MyGeotab setup determines what Geotab data is available in Salesforce. The MyGeotab Admin may have access to all devices in MyGeotab or only a subset. Check with you Geotab Administrator.



Please enter the Geotab Database Name and Geotab Admin User credentials [Validate Geotab Admin User](#)

Username: XXX@mycommpany.com

Password:

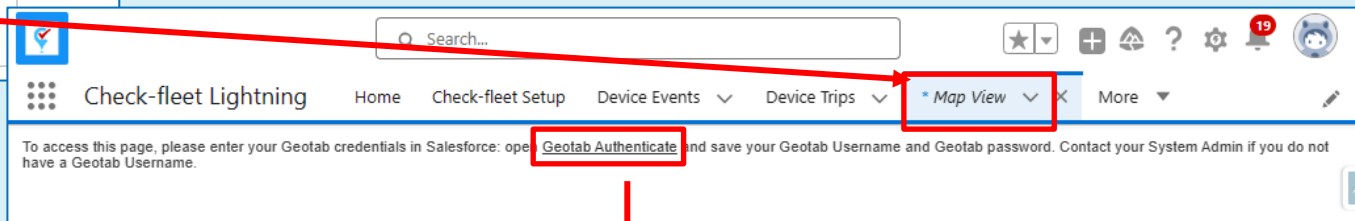
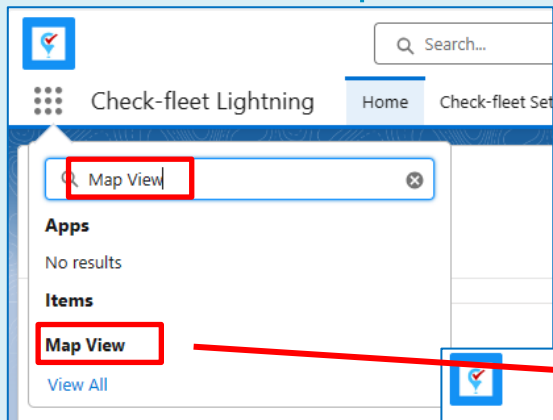
Database: mygeotab_db_name

One Time Setup Tasks: View Geotab Maps in Salesforce

A Check-fleet User can only view Geotab Maps in Salesforce if they save their individual Geotab Credentials in Salesforce

“Map View” Tab

- Geotab Authenticate
- Enter, Validate, **Save MyGeotab Credentials**



This screenshot shows the 'Geotab Authenticate' form. It has a title 'Please enter your Geotab User Name and Password' and a 'Validate Geotab User' button. Below the title, there are two input fields: 'Username:' with the value 'xxx@mycompany.com' and 'Password:' with a masked password '.....'.

One Time Operations Tasks: Populate User Device Association Records

Once Check-fleet Setup completed (page 18):

1. Records auto created by webservice: Device & LatestDeviceEvent

Once Device Records Created (within an hour post authenticate)

1. Records created by scheduled Apex: Device Driver Assignment (see below)
2. Manually Populate “User Device Association” records to mirror current Geotab Driver to Geotab Device assignment in MyGeotab see page 21 “Geotab Data in Salesforce” . GPS Dashboard will assist.

DEVICE records must be created:

1. Schedule Apex: “CreateDDAJob ” once / day.
 - Auto Create DeviceDriverAssignment Record for each Device Record

Job Name	
Apex Class	CreateDDAJob

Geotab Data in Salesforce:

1. **Devices:** Records auto-populate / update hourly after completing two steps in “Check-fleet Setup” Authenticate & Save Geotab Admin Credentials.
1. **Latest Device Event** ⁽³⁾: A record is auto created when a device is added and thereafter auto-populated with latest device location when new Device Event records are created.
2. **Device Driver Assignment:** One record per device that mirrors the Geotab Device to Driver relationship. Auto updated on receipt of new Driver Change event records (see C Setting “Driver Change”) .
3. **User Device Association:** Relates the Geotab device to a Salesforce User. Initially one record is added manually for each Geotab Device to Driver Assignment, thereafter records are auto-deactivated and new records created on receipt of new Driver Change event records.
5. **Device Events** ⁽¹⁾
 - DeviceStatusInfo
 - Driver Change
6. **Trips** ⁽¹⁾
7. **Exception Events** ⁽¹⁾

Notes :

- (1) Enabled by the GPS Dashboard team: update interval based on customer use case
- (2) If a Geotab Driver is assigned to a device in MyGeotab, a Device Event record with Reason “Driver Change” is created in Salesforce and auto updates the User Device Association. The Geotab Driver’s email in Geotab must match the Salesforce User’s Email.
- (3) If FleetTelematics Custom Setting “Copy Latest Device Event” is enabled and the CMDT Latest Location record is created for Service Resource (SR), the latest device location is copied to the SR.LastKnownLocation if the SR.Device is populated

Purge DeviceEvent Records:

Custom Setting
FleetTelematics

Event Days to Delete 1

Device Event Reasons DeviceStatusInfo

To Purge Device Event (DE) Records:

Populate FleetTelematics Custom Setting Fields:

- “Event Days to Delete”: DE records with Create Date more than “X” (“1” in screenshot) days old are deleted.

- “Device Event Reasons”: DE records where DE.”Event Reason” = “DeviceStatusInfo” are deleted.

Schedule Apex Class “CleanDeviceEventJob” to run at repeating frequency as appropriate.

Schedule Apex

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

Job Name

Apex Class CleanDeviceEventJob

Frequency ☒ Weekly ☐ Monthly

Recurs every week on

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

Start 10/13/2023 [10/13/2023]

End 11/13/2023 [10/13/2023]

Preferred Start Time --None--

Service Appointment Status Transitions: Customizable

