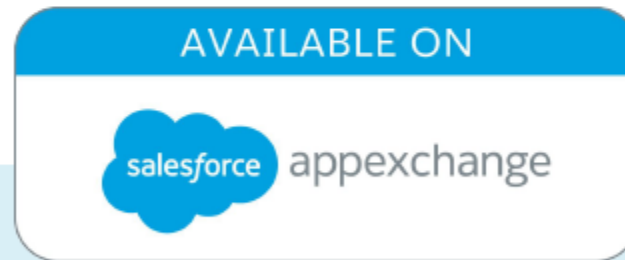




Powered by **GEOTAB**

Check-in Admin Guide



October 2019

support@gpsdashboard.com
(877) 937-3654 X2

Install Check-in from the AppExchange

- Check-in App Overview in AppExchange
- Click “Get it Now”

The screenshot displays the AppExchange page for the 'Check-in' app. At the top, there's a navigation bar with 'APP STORE' and a search bar. Below this, the app title 'Check-in: Field Sales & Field Service Management with Real Time Location' is shown, along with the developer 'by GPS Dashboard Inc.' and a brief description: 'Gain visibility to your mobile workforce: verify account visits, check-ins'. The app is rated 5 stars and is marked as 'Paid'. A sidebar on the left contains navigation links: 'DETAILS' (selected), 'REVIEWS', and 'PROVIDER'. The main content area features a map titled 'Check-in with Salesforce1' showing various locations, and a list of check-in events. To the right, the pricing is listed as '\$20 USD per user per month', followed by a description of the app's benefits for sales performance. A 'Read More' link is provided. At the bottom, there are sections for 'Highlights' and 'Contact Information', a 'Watch Demo' button, and a prominent 'Get It Now' button.

APP STORE ▾ Search AppExchange

< BACK

Check-in: Field Sales & Field Service Management with Real Time Location by GPS Dashboard Inc.

Gain visibility to your mobile workforce: verify account visits, check-ins

★★★★★

Paid

DETAILS

REVIEWS

PROVIDER

Check-in with Salesforce1

\$20 USD per user per month ⓘ

Improve your sales performance with CHECK-in, an advanced sales analytics and performance management app. This one simple geolocation app, guarantees that your most valuable asset- your field sales team- is performing at the highest level possible.

Read More

Check-in with Salesforce 1

Highlights

Contact Information

Watch Demo

Get It Now

Install Check-in from the AppExchange

- Enter your salesforce credentials

Log In to AppExchange



To continue, log in to your AppExchange account. If you don't have an AppExchange account, use your Salesforce credentials to log in. [Why do I need to log in?](#)

For certain actions, like reviewing a listing or installing a package, we need to verify your identity first.

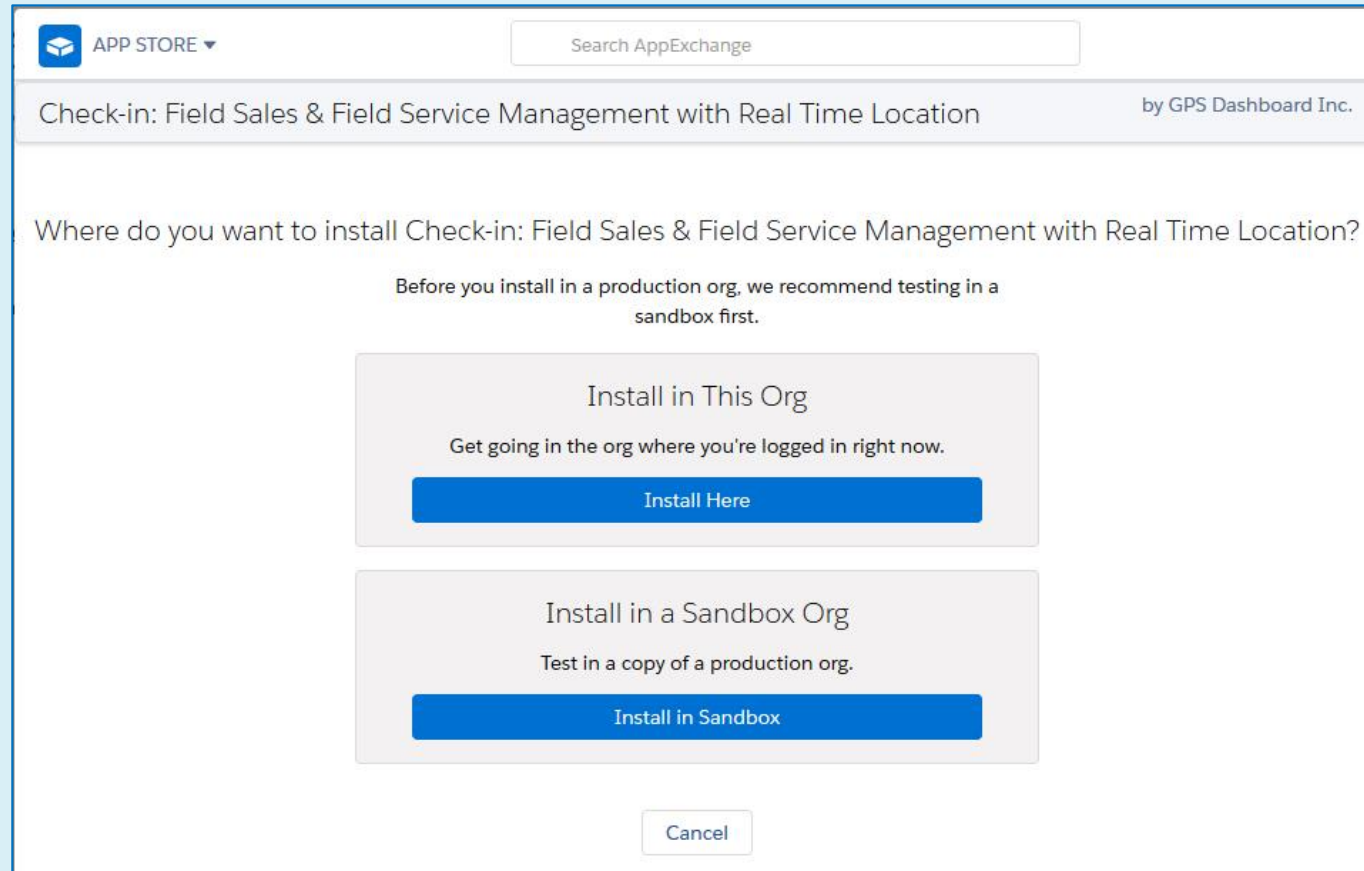
By logging in, you agree to our [Terms of Use](#) and [Privacy Statement](#)

Cancel

Open Login Screen

Install Check-in from the AppExchange

- Select production or sandbox org to install Check-in application



The screenshot shows the AppExchange interface for installing the 'Check-in' application. At the top, there's a header with the 'APP STORE' logo and a search bar labeled 'Search AppExchange'. Below this, the application name 'Check-in: Field Sales & Field Service Management with Real Time Location' is displayed, along with the developer 'by GPS Dashboard Inc.'. The main content area asks 'Where do you want to install Check-in: Field Sales & Field Service Management with Real Time Location?' and provides a recommendation: 'Before you install in a production org, we recommend testing in a sandbox first.' There are two main options: 'Install in This Org' with the subtext 'Get going in the org where you're logged in right now.' and 'Install in a Sandbox Org' with the subtext 'Test in a copy of a production org.' Each option has a blue button labeled 'Install Here' or 'Install in Sandbox'. A 'Cancel' button is located at the bottom center.

APP STORE ▾ Search AppExchange

Check-in: Field Sales & Field Service Management with Real Time Location by GPS Dashboard Inc.

Where do you want to install Check-in: Field Sales & Field Service Management with Real Time Location?

Before you install in a production org, we recommend testing in a sandbox first.

Install in This Org
Get going in the org where you're logged in right now.
[Install Here](#)

Install in a Sandbox Org
Test in a copy of a production org.
[Install in Sandbox](#)

[Cancel](#)

Install Check-in from the AppExchange

- Edit / Enter Profile details
- Agree to “terms & conditions”
- Click “Confirm and install”

APP STORE ▾ Search AppExchange

Check-in: Field Sales & Field Service Management with Real Time Location by GPS Dashboard Inc.

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	John	* Company	Check-in Demo
* Last Name	Smith	* Country	United States
* Job Title	System Admin	* State/Province	California
* Email	amin@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.

☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

Cancel **Confirm and Install**

Install Check-in from the AppExchange

- Select “Install for All Users”, click “Install”

Note: Only Users assigned a Check-in App license will have access to Check-in App



Install Check-in: Field Sales & Field Service Management with Real Time Location

By GPS Dashboard Inc.



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Check-in: Field Sales & Field Service Management with Real Time Location	GPS Dashboard Inc.	Check-in ISV	1.28

Description

Improve your sales performance with CHECK-in, an advanced sales analytics and performance management app. This one simple geolocation app, guarantees that your most valuable asset- your field sales team- is performing at the highest level possible.

Additional Details [View Components](#)

Install Check-in from the AppExchange

- Confirm access to Remote Site “maps.googleapis.com” and continue

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. What if you are unsure?

Website	SSL Encrypted
maps.googleapis.com	☒

☒ Yes, grant access to these third-party web sites

Continue

Cancel

Install Check-in from the AppExchange

- Wait for the “Installation Complete” message



Install Check-in: Field Sales & Field Service Management with Real Time Location

By GPS Dashboard Inc.

**Installation Complete!**

Done

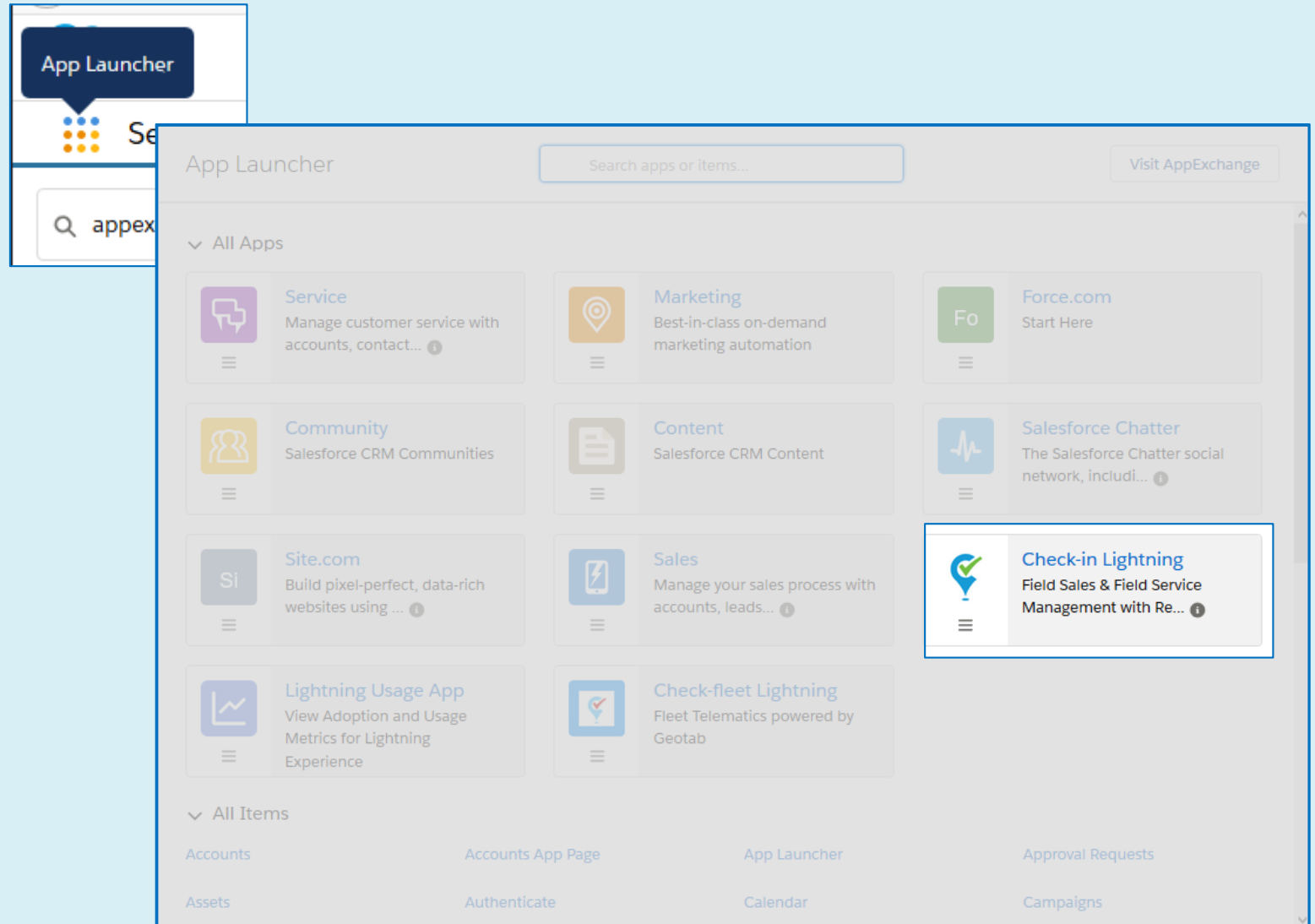
App Name	Publisher	Version Name	Version Number
Check-in: Field Sales & Field Service Management with Real Time Location	GPS Dashboard Inc.	Check-in ISV	1.28

Description

Improve your sales performance with CHECK-in, an advanced sales analytics and performance management app. This one simple geolocation app, guarantees that your most valuable asset- your field sales team- is performing at the highest level possible.

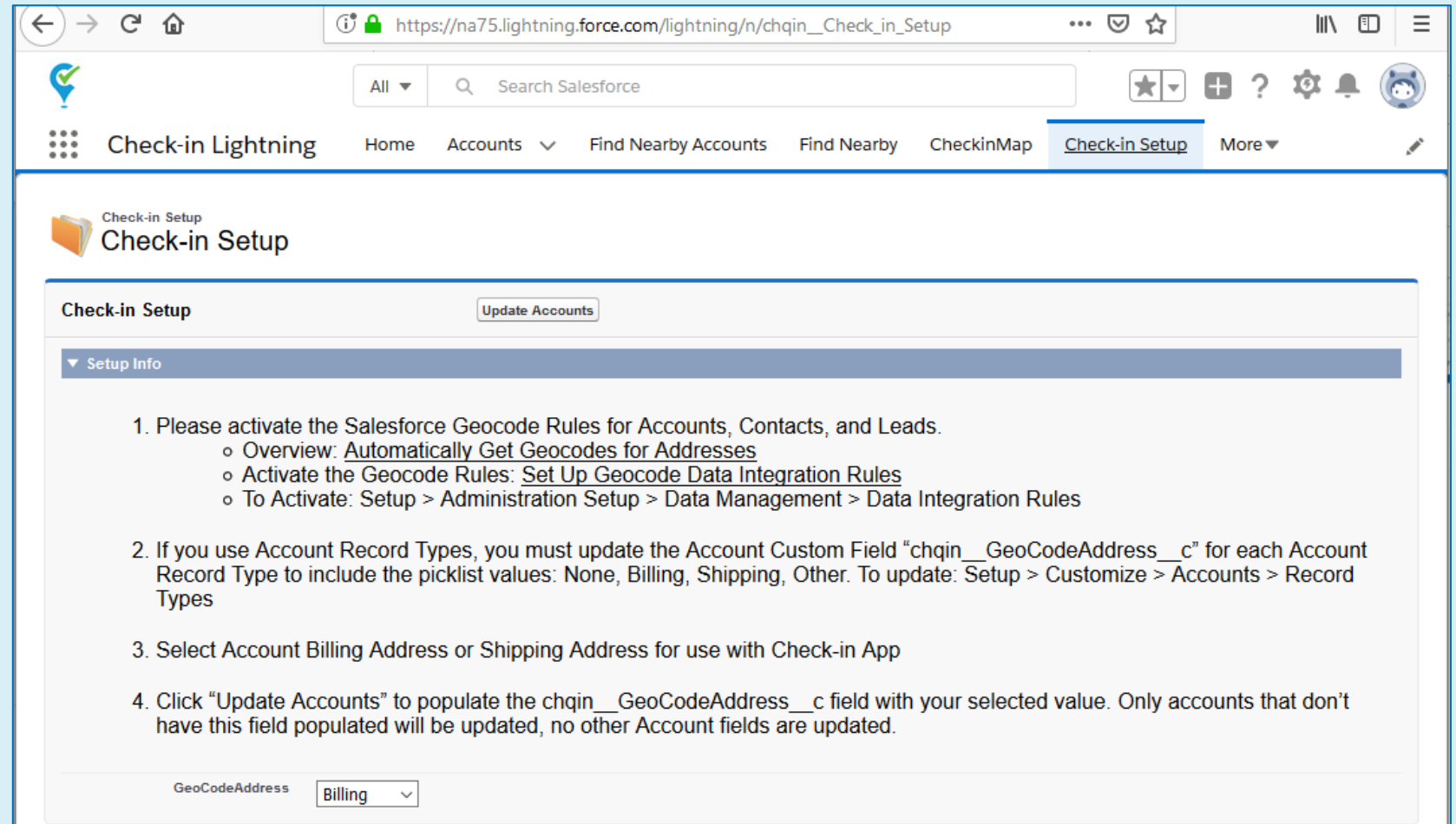
Launch Check-in App

- Click “App Launcher”
- Click “Check-in Lightning”



Check-in Setup

- Click Tab “Check-in Setup”



The screenshot shows the Salesforce interface for the 'Check-in Setup' page. The browser address bar displays the URL: https://na75.lightning.force.com/lightning/n/chqin__Check_in_Setup. The Salesforce navigation bar includes the 'Check-in Lightning' app icon and a search bar. The 'Check-in Setup' tab is selected in the top navigation menu. The main content area is titled 'Check-in Setup' and features an 'Update Accounts' button. A section titled 'Setup Info' contains the following instructions:

1. Please activate the Salesforce Geocode Rules for Accounts, Contacts, and Leads.
 - Overview: [Automatically Get Geocodes for Addresses](#)
 - Activate the Geocode Rules: [Set Up Geocode Data Integration Rules](#)
 - To Activate: Setup > Administration Setup > Data Management > Data Integration Rules
2. If you use Account Record Types, you must update the Account Custom Field "chqin__GeoCodeAddress__c" for each Account Record Type to include the picklist values: None, Billing, Shipping, Other. To update: Setup > Customize > Accounts > Record Types
3. Select Account Billing Address or Shipping Address for use with Check-in App
4. Click "Update Accounts" to populate the chqin__GeoCodeAddress__c field with your selected value. Only accounts that don't have this field populated will be updated, no other Account fields are updated.

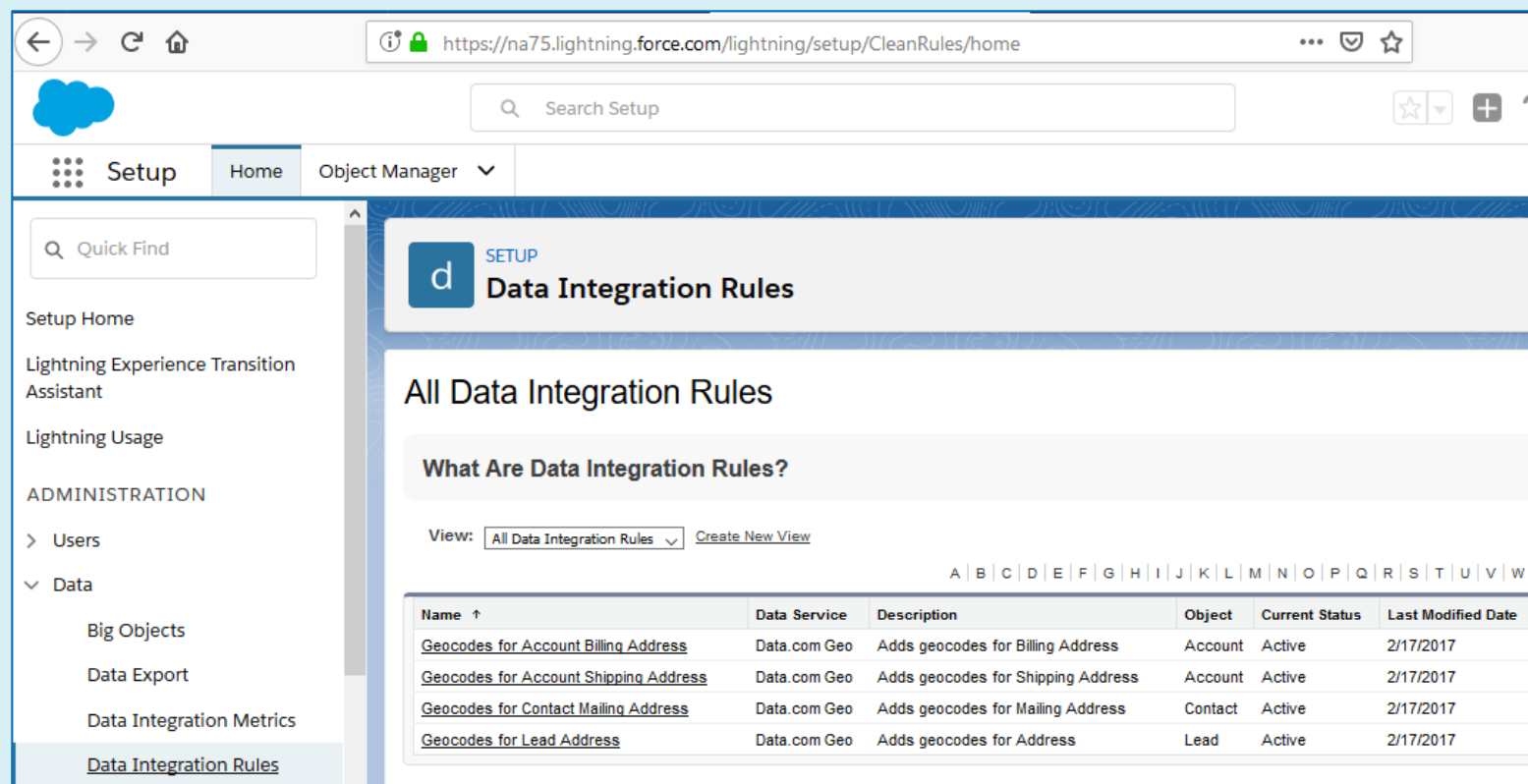
At the bottom of the page, there is a label 'GeoCodeAddress' and a dropdown menu currently set to 'Billing'.

Activate “Data Integration Rules”

Data integration rules are provided by a data service to control how the service updates your Salesforce records. Rules tell the data service how to find records to update and which updates to make. Rules also control how updates affect other features, such as triggers and workflow rules.

To activate rules:

- Go to Setup > Data > Data Integration rules



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. Under 'Data', 'Data Integration Rules' is highlighted. The main content area displays 'Data Integration Rules' with a 'What Are Data Integration Rules?' section. Below this, a table lists all data integration rules.

Name ↑	Data Service	Description	Object	Current Status	Last Modified Date
Geocodes for Account Billing Address	Data.com Geo	Adds geocodes for Billing Address	Account	Active	2/17/2017
Geocodes for Account Shipping Address	Data.com Geo	Adds geocodes for Shipping Address	Account	Active	2/17/2017
Geocodes for Contact Mailing Address	Data.com Geo	Adds geocodes for Mailing Address	Contact	Active	2/17/2017
Geocodes for Lead Address	Data.com Geo	Adds geocodes for Address	Lead	Active	2/17/2017

Activate Data Integration Rules

- Activate Rules for: Account Billing, Account Shipping, Contact and Lead

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 | L | M | N | O | P | Q | R | S | T | U | V | W

Name ↑	Data Service	Description	Object	Current Status	Last Modified Date
Geocodes for Account Billing Address	Data.com Geo	Adds geocodes for Billing Address	Account	Active	2/17/2017
Geocodes for Account Shipping Address	Data.com Geo	Adds geocodes for Shipping Address	Account	Active	2/17/2017
Geocodes for Contact Mailing Address	Data.com Geo	Adds geocodes for Mailing Address	Contact	Active	2/17/2017
Geocodes for Lead Address	Data.com Geo	Adds geocodes for Address	Lead	Active	2/17/2017

Optional*: Configure GeoCodeAddress for Account Record Types

Required if Account Record Types have been created in your Org



SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Record Type

Test1

Help for this Page

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	Test1	Active	✓
Record Type Name	Test1		
Namespace Prefix			
Description			
Created By	John Smith, 4/23/2019 10:02 AM	Modified By	John Smith, 4/23/2019 10:02 AM

Picklists Available for Editing

Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Account Source	4/23/2019 10:02 AM
Edit	Active	4/23/2019 10:02 AM
Edit	Customer Priority	4/23/2019 10:02 AM
Edit	GeoCodeAddress	4/23/2019 10:02 AM
Edit	Industry	4/23/2019 10:02 AM

- Verify Account Custom Field “GeoCodeAddress” contains all values in “Selected Values” column for each of your Account Record Type

SETUP > OBJECT MANAGER

 **Account**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Validation Rules

Hierarchy Columns

Record Type Edit

GeoCodeAddress

General Properties

Field Label	GeoCodeAddress
Record Type	Test1

Picklist Values

Select an item from the Available Values list and add it to the Selected Values, remove it from any existing records. Finally, select a default picklist value for this record type.

Available Values

--None--

Selected Values

None
Shipping
Billing
Other

Add

Remove

Default

Billing

Save

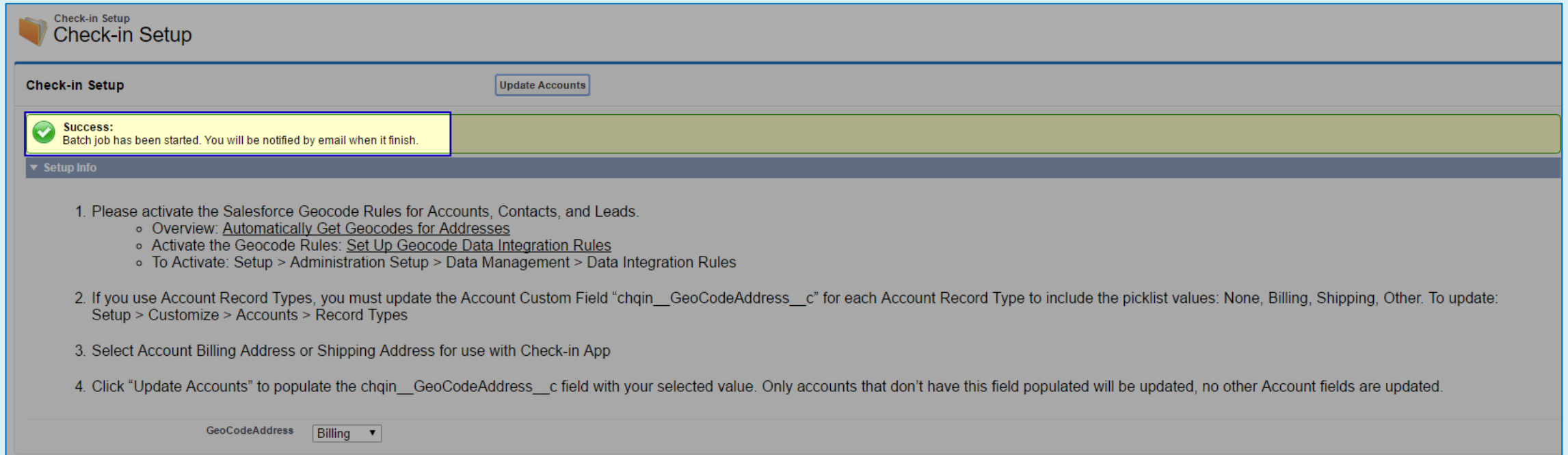
Cancel

Update Accounts

- Tab “Check-in Setup”
- “GeoCodeAddress”: Select “Billing” or “Shipping”
- Click “Update Accounts” to auto populate the “GeoCodeAddress” field on your existing account records

Update Accounts

- Information message is displayed



The screenshot displays the 'Check-in Setup' interface. At the top left, there is a folder icon and the text 'Check-in Setup'. Below this, a 'Check-in Setup' section contains an 'Update Accounts' button. A yellow success message box with a green checkmark icon is visible, stating: 'Success: Batch job has been started. You will be notified by email when it finish.' Below the message, a 'Setup Info' section is expanded, showing a list of instructions:

1. Please activate the Salesforce Geocode Rules for Accounts, Contacts, and Leads.
 - Overview: [Automatically Get Geocodes for Addresses](#)
 - Activate the Geocode Rules: [Set Up Geocode Data Integration Rules](#)
 - To Activate: Setup > Administration Setup > Data Management > Data Integration Rules
2. If you use Account Record Types, you must update the Account Custom Field "chqin__GeoCodeAddress__c" for each Account Record Type to include the picklist values: None, Billing, Shipping, Other. To update: Setup > Customize > Accounts > Record Types
3. Select Account Billing Address or Shipping Address for use with Check-in App
4. Click "Update Accounts" to populate the chqin__GeoCodeAddress__c field with your selected value. Only accounts that don't have this field populated will be updated, no other Account fields are updated.

At the bottom, there is a 'GeoCodeAddress' label and a dropdown menu currently set to 'Billing'.

Accounts Map View

- Configure Account List View
 - Go to Setup
 - Objects & Fields
 - Object Manager
 - Accounts
 - Search Layout
 - List View
 - Edit : add “Map View” button

Note: A “Map View” button is added to the Accounts List View page, see next slide

The screenshot shows the 'Setup > OBJECT MANAGER' interface for 'Account'. The left sidebar lists various configuration options, with 'Search Layouts' selected. The main area displays a table of search layouts with 6 items, sorted by layout. The table has columns for LAYOUT, COLUMNS DISPLAYED, and BUTTONS DISPLAYED. The 'List View' layout is highlighted, showing columns for Account Name, Account Site, Account Owner Alias, and Type, and buttons for New, Open in Quip, Clean, Get More Accounts, Discover Companies, Add to Call List, and Map View. An 'Edit' button is visible next to the 'List View' row.

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open in Quip, Clean, Get More Accounts, Discover Companies, Add to Call List, Map View
Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A
Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A
Search Filter Fields	N/A	N/A
Search Results	Account Name, Account Site, Phone, Account Owner Alias	N/A
Tab	Account Name, Billing City, Phone	N/A

Accounts Map View (Continued)

Select “Map View”, click “Add”, then “Save”

Edit Search Layout

Accounts List View

Customize the buttons on the Accounts list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

☒ New [New]

☒ Clean [ListClean]

☒ Get More Accounts [DataDotComGetAccountsMultiAddAction]

Custom Buttons

Available Buttons

Create Geofences

Add

Remove

Selected Buttons

Map View

Up

Down

Save

Cancel

Accounts Map View (Continued)

- Go to Accounts Tab, Select several Accounts and click “Map View” button

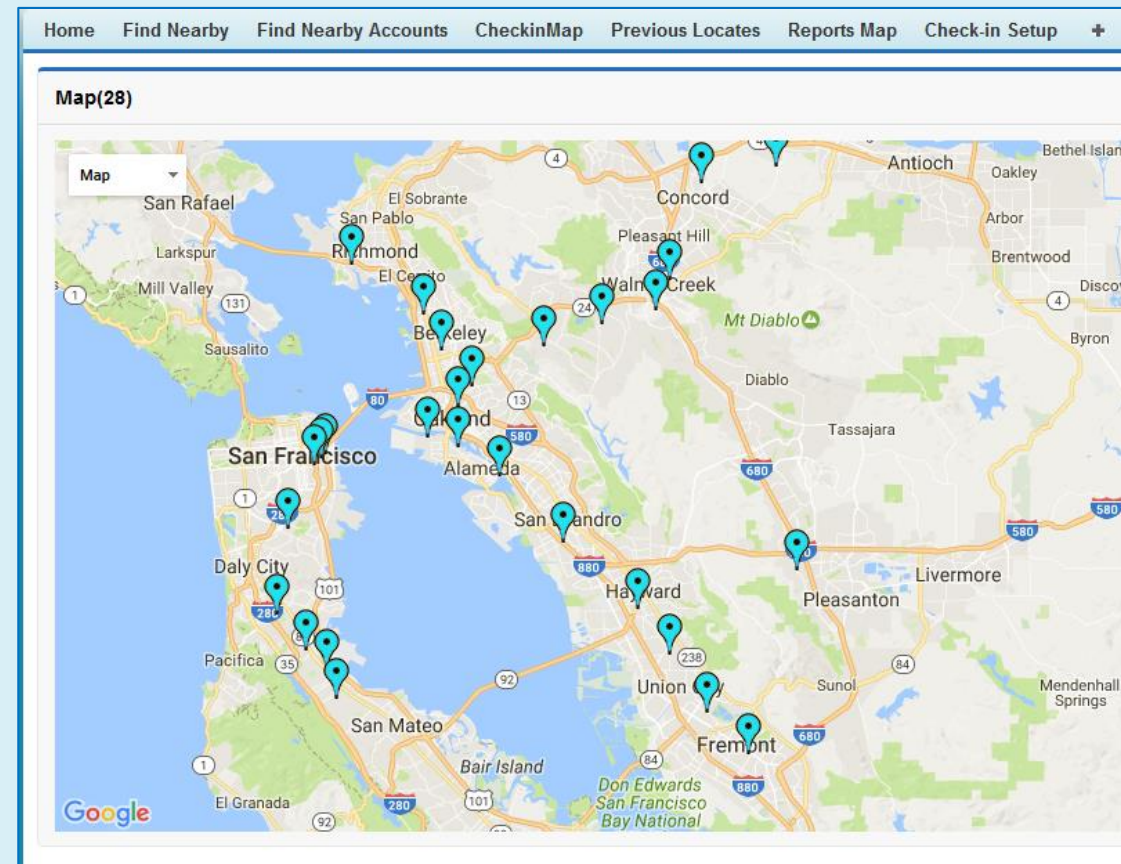
The screenshot displays the GPS Dashboard interface for the Accounts Map View. The top navigation bar includes links for Home, Find Nearby, Find Nearby Accounts, CheckinMap, Previous Locates, Reports Map, and Check-in Setup. The main header shows a dropdown menu for 'BART' with options to Edit, Delete, or Create New View. A 'Create New...' button is on the left. The left sidebar lists 'Recent Items' including 62148, Edge Communications, Anton, sForce, DT-333, and a Recycle Bin. The main content area shows a table of BART accounts. The 'Map View' button is highlighted with a red circle and a '2' label. A red circle with a '1' label points to the bottom of the list.

Action	Account Name	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country	GeoCodeAddress
✓ Edit Del +	BART El Cerrito Plaza	6699 Fairmount Avenue	El Cerrito	CA	94530		Billing
✓ Edit Del +	BART Embarcadero	298 Market Street	San Francisco	CA	94111		Billing
✓ Edit Del +	BART Fremont	2000 BART Way	Fremont	CA	94536		Billing
✓ Edit Del +	BART Fruitvale	3401 East 12th Street	Oakland	CA	94601		Billing
✓ Edit Del +	BART Glen Park	2901 Diamond Street	San Francisco	CA	94131		Billing
✓ Edit Del +	BART Hayward	699 B Street	Hayward	CA	94541		Billing
✓ Edit Del +	BART Lafayette	3601 Deer Hill Road	Lafayette	CA	94549		Billing
✓ Edit Del +	BART Lake Merritt	800 Madison Street	Oakland	CA	94607		Billing
✓ Edit Del +	BART MacArthur	555 40th Street	Oakland	CA	94609		Billing
✓ Edit Del +	BART Millbrae	200 North Rollins Road	Millbrae	CA	94030		Billing
✓ Edit Del +	BART Montgomery St	598 Market Street	San Francisco	CA	94104		Billing
✓ Edit Del +	BART North Berkeley	1750 Sacramento Street	Berkeley	CA	94702		Billing
✓ Edit Del +	BART North Concord/Martinez	3700 Port Chicago Highway	Concord	CA	94520		Billing
✓ Edit Del +	BART Orinda	11 Camino Pablo	Orinda	CA	94563		Billing
✓ Edit Del +	BART Pittsburg/Bay Point	1700 West Leland Road	Pittsburg	CA	94565		Billing
✓ Edit Del +	BART Pleasant Hill/Contra Costa Ce...	1365 Treat Blvd.	Walnut Creek	CA	94597		Billing
✓ Edit Del +	BART Powell St	899 Market Street	San Francisco	CA	94102		Billing
✓ Edit Del +	BART Richmond	1700 Nevin Avenue	Richmond	CA	94801		Billing
✓ Edit Del +	BART Rockridge	5660 College Avenue	Oakland	CA	94618		Billing
✓ Edit Del +	BART San Bruno	1151 Huntington Avenue	San Bruno	CA	94066		Billing
✓ Edit Del +	BART San Francisco Intl Airport	International Terminal, Level 3	San Francisco Intl Airport	CA	94128		Billing
✓ Edit Del +	BART San Leandro	1401 San Leandro Blvd.	San Leandro	CA	94577		Billing
✓ Edit Del +	BART South Hayward	28601 Dixon Street	Hayward	CA	94544		Billing
✓ Edit Del +	BART South San Francisco	1333 Mission Road	South San Francisco	CA	94080		Billing
✓ Edit Del +	BART Union City	10 Union Square	Union City	CA	94587		Billing
✓ Edit Del +	BART Walnut Creek	200 Ygnacio Valley Road	Walnut Creek	CA	94596		Billing
✓ Edit Del +	BART West Dublin/Pleasanton	6501 Golden Gate Drive	Dublin	CA	94568		Billing
✓ Edit Del +	BART West Oakland	1451 7th Street	Oakland	CA	94607		Billing

Accounts Map View

- Accounts will display on the map

*Note: The Account Billing Address
OR Account Shipping address
is displayed, based on the value
of the Account custom field
“GeocodeAddress”.*



Assign Check-in Licenses to Users

- Go to Setup > Installed Packages > Check-in app > Manage Licences

Installed Packages

On Force.com AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. 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	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date
Uninstall Manage Licenses	Check-in Description Check-in App ISV	GPS Dashboard - Checkin ISV	1.28	chqin	Trial	3	1	4/3/2017	3/20/2017 10:29 AM

Assign Check-in Licenses to Users

- Click “Add User” to grant access to Check-in for new user

Package Details

Check-in

[Back to Previous Page](#)

Package Name	Check-in
Status	Trial
Expiration Date	4/2/2017

Licensed Users

Add Users

Remove Multiple Users

Action	Full Name ↑	Role
Remove		Installation & Repair Services

Assign Check-in Licenses to Users

- Select new user and click “Add” button

Add Users
Check-in

View: All ▼ [Create New View](#)

Available Users [Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

Action	Full Name ↑	Role
☐	[Redacted]	[Redacted]
☒	Smith, John	Check-fleet Partner Account Partner User

Selected Users

Action	Full Name
☒	Smith, John

[Add](#) [Cancel](#)

1

2

Assign Check-in Licenses to Users

➤ Access granted

Package Details

Check-in

[Back to Previous Page](#)

Package Name	Check-in
Status	Trial
Expiration Date	4/2/2017

Licensed Users

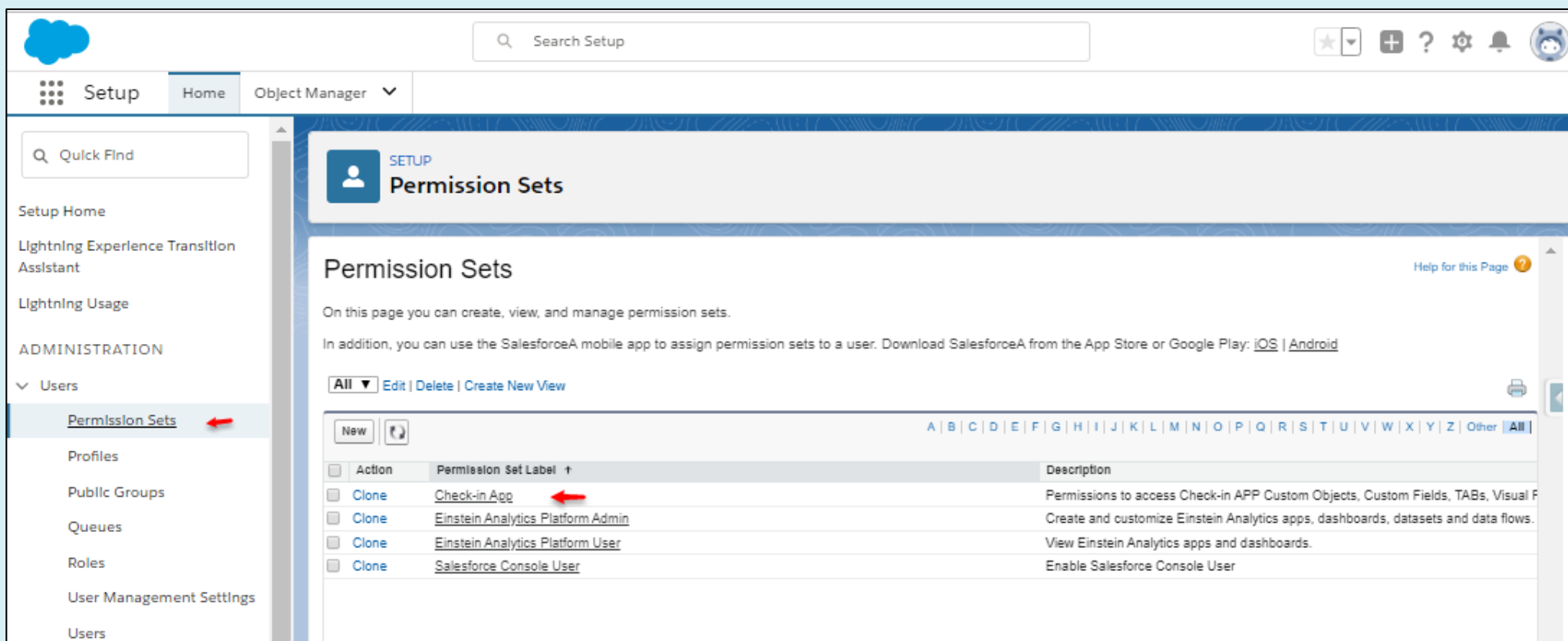
Add Users

Remove Multiple Users

Action	Full Name ↑	Role
Remove		Installation & Repair Services
Remove	Smith, John	Check-fleet Partner Account Partner User

Assign Check-in App Permission Set to Users

➤ Setup > Administration > Permission Sets > Check-in App



Setup Home Object Manager

Quick Find

Setup Home

Lightning Experience Transition Assistant

Lightning Usage

ADMINISTRATION

Users

Permission Sets

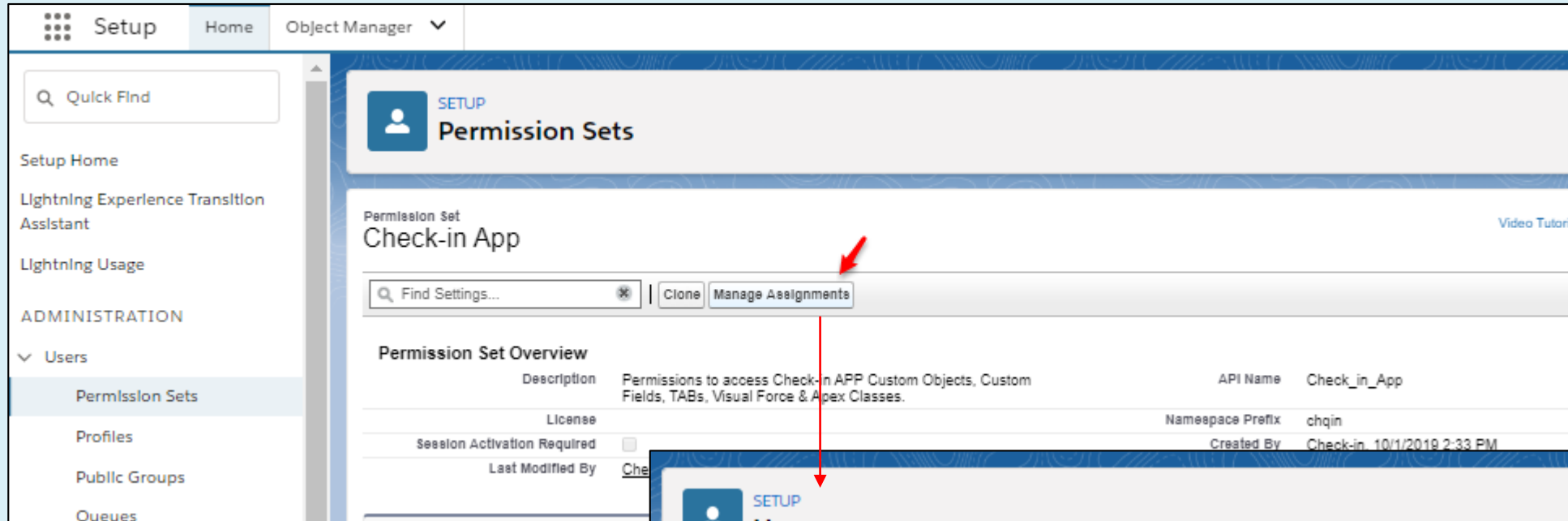
On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Edit Delete Create New View

Action	Permission Set Label	Description
Clone	Check-in App	Permissions to access Check-in APP Custom Objects, Custom Fields, TABs, Visual F
Clone	Einstein Analytics Platform Admin	Create and customize Einstein Analytics apps, dashboards, datasets and data flows.
Clone	Einstein Analytics Platform User	View Einstein Analytics apps and dashboards.
Clone	Salesforce Console User	Enable Salesforce Console User

Assign Check-in App Permission Set to Users (Continued)

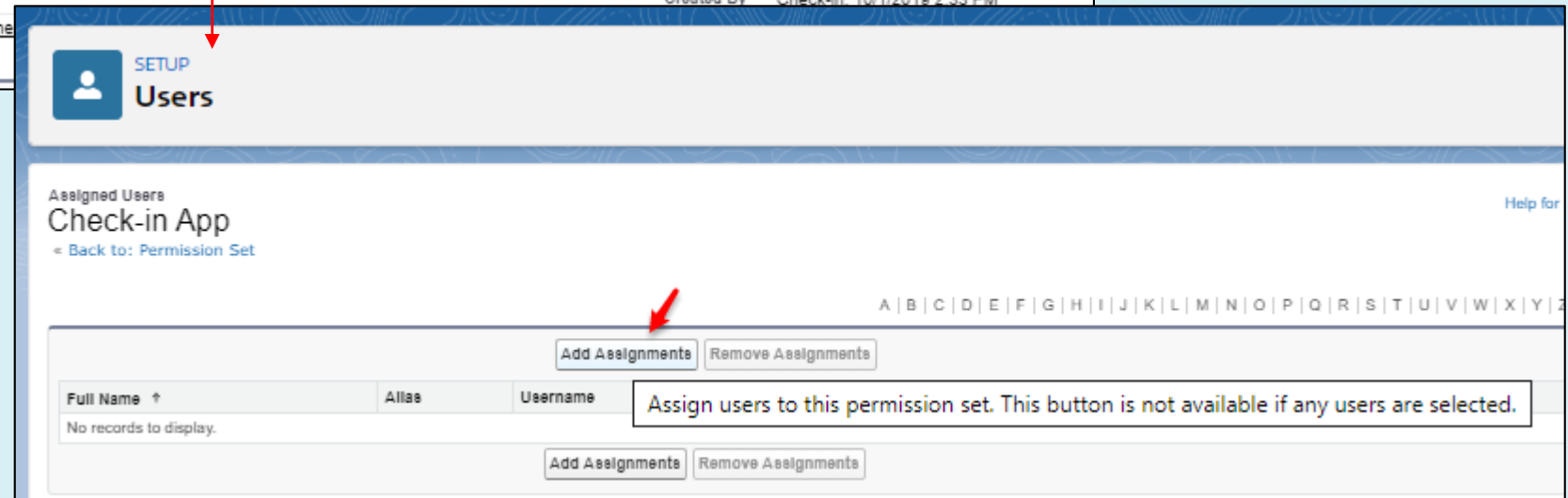


The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Users' section is expanded, and 'Permission Sets' is selected. The main content area displays the 'Check-in App' Permission Set. A red arrow points to the 'Manage Assignments' button in the top right corner of the permission set overview.

Permission Set Overview

Description	API Name
Permissions to access Check-in APP Custom Objects, Custom Fields, TABs, Visual Force & Apex Classes.	Check_in_App

Additional details shown include: License, Namespace Prefix (chqin), Session Activation Required (checkbox), Created By (Check-in), and Last Modified By (Che).



The screenshot shows the 'Assigned Users' page for the 'Check-in App' permission set. A red arrow points to the 'Add Assignments' button in the top right corner of the page. A tooltip is visible over the button, stating: 'Assign users to this permission set. This button is not available if any users are selected.'

Assigned Users

Check-in App

« Back to: Permission Set

Full Name ↑ Alias Username

No records to display.

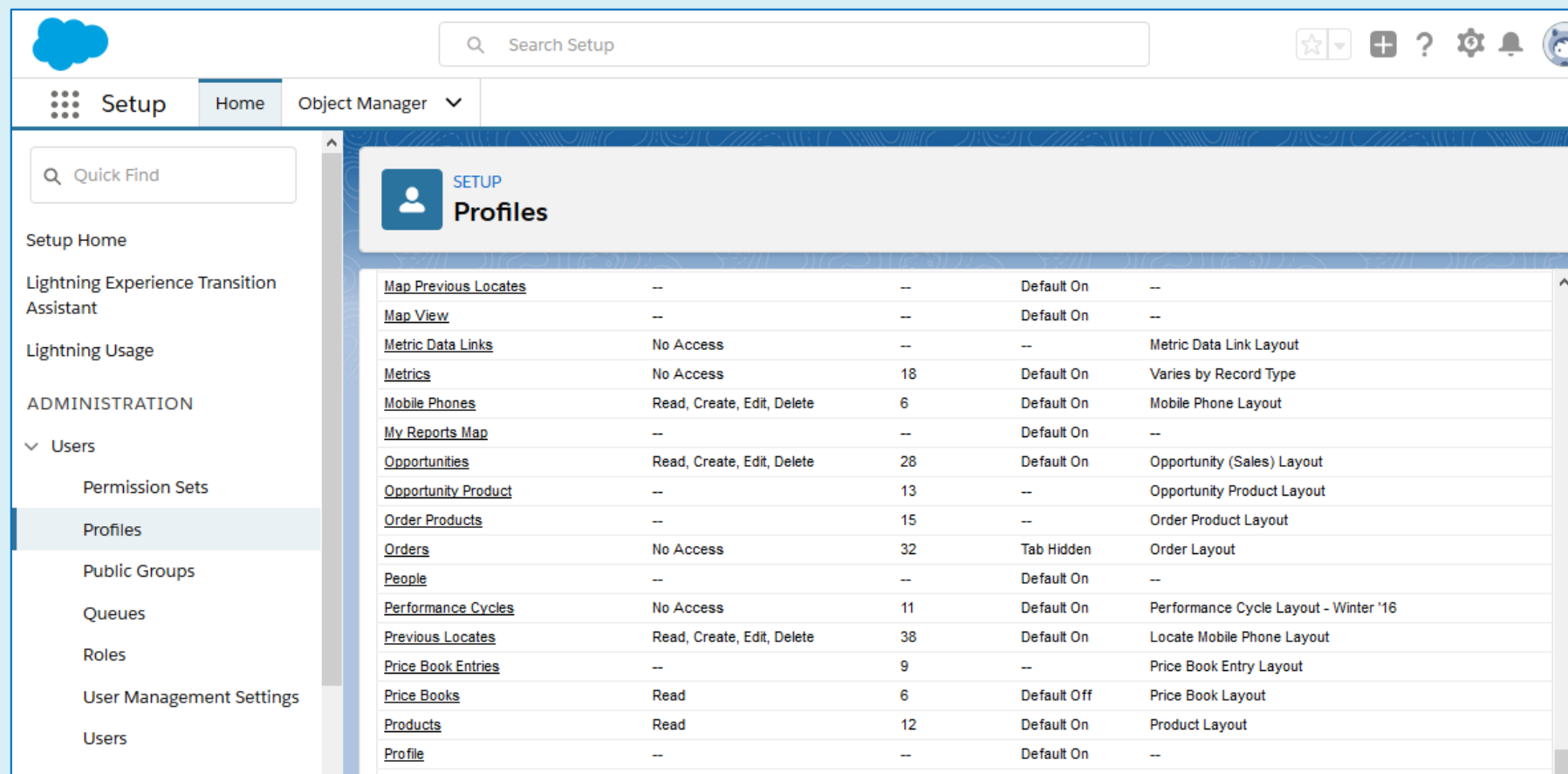
Add Assignments Remove Assignments

Salesforce “Standard User” Profile not Supported

- Clone the standard user profile, then update the cloned profile, provide read/update access to the two custom objects:
 - Mobile Phone
 - Previous Locates

Setup

- Continued next page



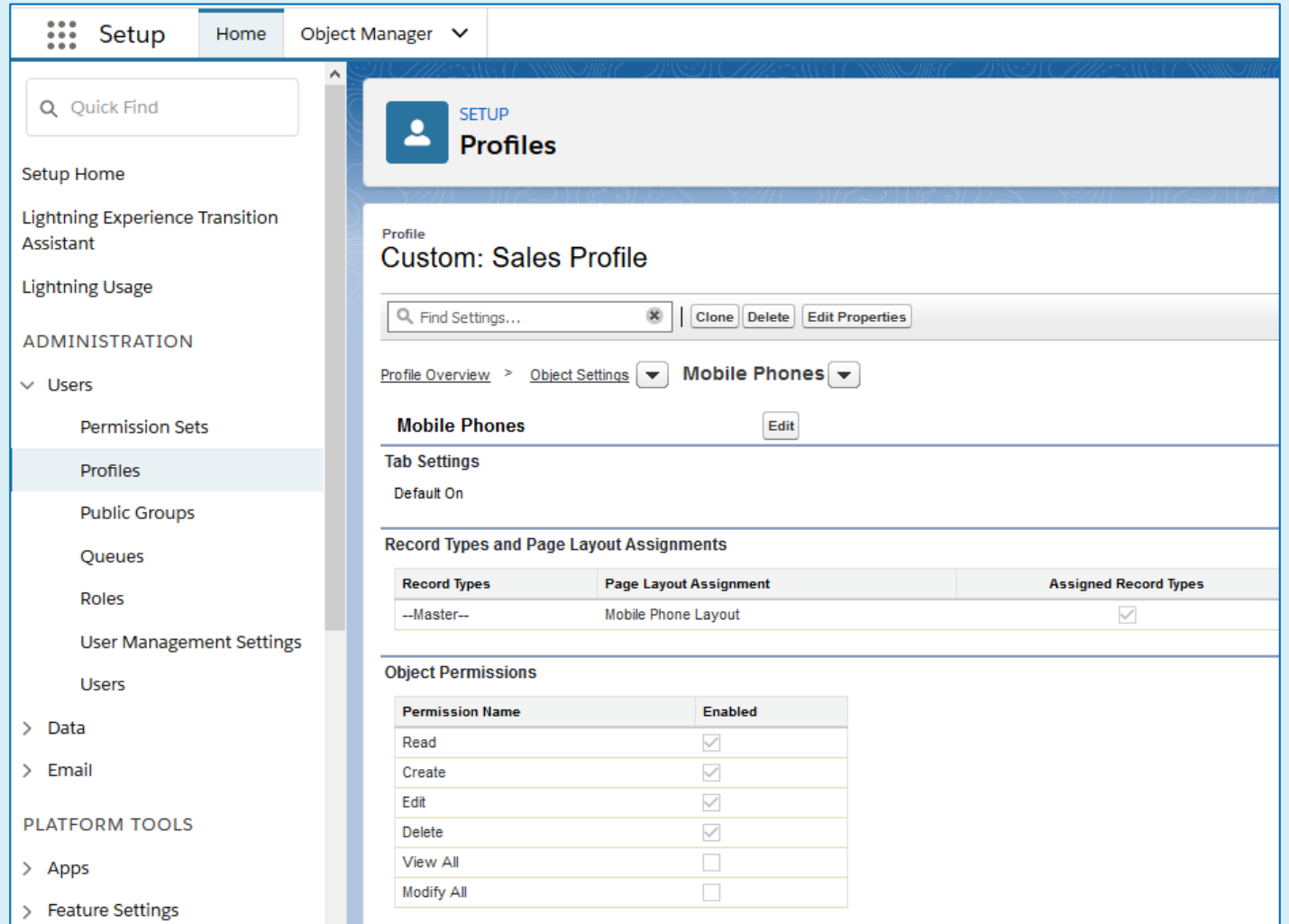
The screenshot shows the Salesforce Setup interface. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION, Users (expanded), Permission Sets, Profiles (selected), Public Groups, Queues, Roles, User Management Settings, and Users. The main content area is titled 'SETUP Profiles' and displays a table of system profiles.

Profile Name	Access	Record Count	Default	Layout
Map Previous Locates	--	--	Default On	--
Map View	--	--	Default On	--
Metric Data Links	No Access	--	--	Metric Data Link Layout
Metrics	No Access	18	Default On	Varies by Record Type
Mobile Phones	Read, Create, Edit, Delete	6	Default On	Mobile Phone Layout
My Reports Map	--	--	Default On	--
Opportunities	Read, Create, Edit, Delete	28	Default On	Opportunity (Sales) Layout
Opportunity Product	--	13	--	Opportunity Product Layout
Order Products	--	15	--	Order Product Layout
Orders	No Access	32	Tab Hidden	Order Layout
People	--	--	Default On	--
Performance Cycles	No Access	11	Default On	Performance Cycle Layout - Winter '16
Previous Locates	Read, Create, Edit, Delete	38	Default On	Locate Mobile Phone Layout
Price Book Entries	--	9	--	Price Book Entry Layout
Price Books	Read	6	Default Off	Price Book Layout
Products	Read	12	Default On	Product Layout
Profile	--	--	Default On	--

Salesforce “Standard User” Profile not Supported (Continued)

Setup

- Users
- Profiles
- Select a Custom Profile
- “Object Settings”
- Click “Mobile Phone”
- “Edit”
 - Enable
 - Create
 - Read
 - Edit
 - Delete



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with sections: Setup Home, Lightning Experience Transition Assistant, Lightning Usage, ADMINISTRATION (Users, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings), Data, Email, PLATFORM TOOLS (Apps, Feature Settings). The main content area is titled 'Profiles' and shows the 'Custom: Sales Profile'. Below the profile name is a search bar and buttons for 'Clone', 'Delete', and 'Edit Properties'. The 'Mobile Phones' section is expanded, showing 'Tab Settings' (Default On) and 'Record Types and Page Layout Assignments'. A table shows the 'Mobile Phone Layout' assigned to the 'Master' record type. The 'Object Permissions' section shows a table of permissions for the 'Mobile Phone' object.

Record Types	Page Layout Assignment	Assigned Record Types
--Master--	Mobile Phone Layout	☒

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☐
Modify All	☐

Event Check-in fields: Set to Read Only

- Lock the Check-in Event custom fields: From Event page layout or field level security.
- Users should not have ability to modify Check-in Event custom fields:
 - Check-in / out Time
 - Check-in / out Location
 - Check-in / out Distance

⋮ Check-In / Check-Out (Header visible on detail only)

⋮ Check-In / Check-Out Details (Header visible on detail only)

🔒 Check-In Time	3/20/2017 12:42 PM	🔒 Check-Out Time	3/20/2017 12:42 PM
🔒 Check-In Location	Sample Check-In Location	🔒 Check-Out Location	Sample Check-Out Location
🔒 Check In Distance	4.0940	🔒 Check Out Distance	0.3742
		🔒 Visit Duration (Minutes)	19,735

⋮ Map (Header visible on detail only)

Select Account Billing / Shipping Address

- You can display either the Account Billing or Shipping Address on the Check-in Maps
- You can find “GeoCodeAddress” picklist on Account object
- “Billing” is selected by default, you can change to “Shipping”

GeoCodeAddress	Billing	
Check-In Geolocation	--None--	22.278883
Shipping Address	None	
	Shipping	
	Billing	
	Other	
Last Modified By		2017 5:48 AM

Account Custom Field
GeoCodeAddress (Managed)
[Back to Account Fields](#)

This Custom Field Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Validation Rules](#)

Custom Field Definition Detail [Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	GeoCodeAddress
Field Name	GeoCodeAddress
Namespace Prefix	chqin
API Name	chqin__GeoCodeAddress__c
Description	
Help Text	
Created By	Admin, 2/24/2017 7:45 AM

Package Information

Installed Package	Check-in
-------------------	--------------------------

General Options

Required	☐
----------	--------------------------

Picklist Options

Restrict picklist to the values defined in the value set.	☐
Controlling Field	[New]

Field Dependencies [New](#)

No dependencies defined.

Validation Rules [New](#)

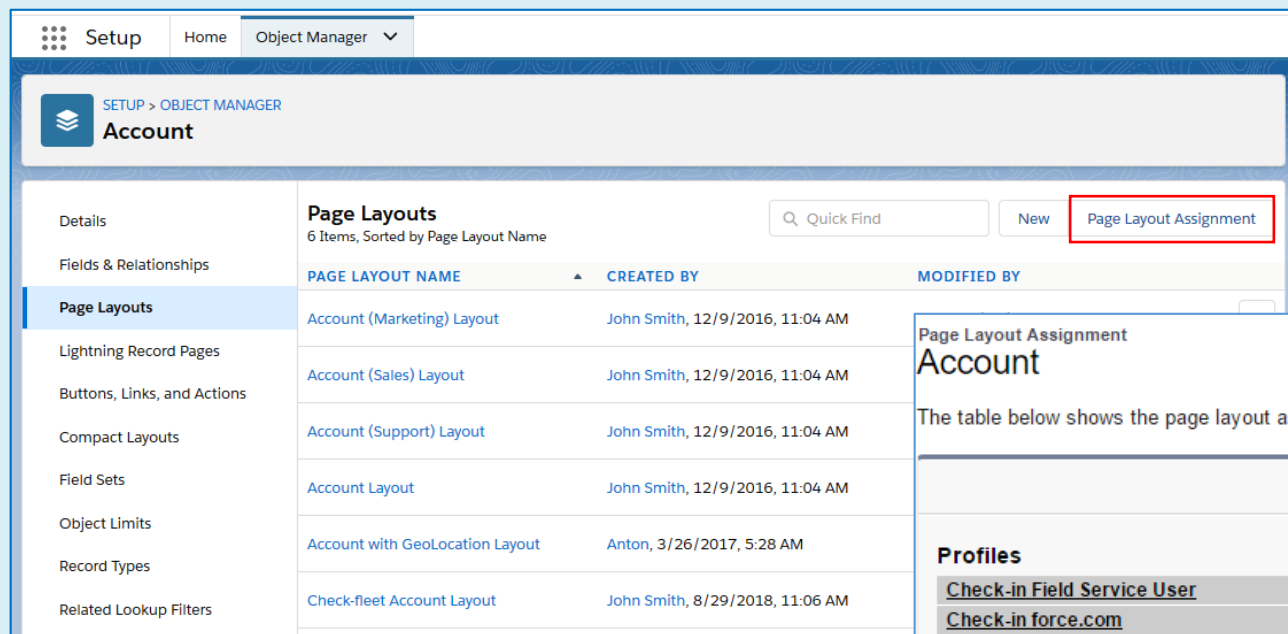
No validation rules defined.

Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors](#)

Action	Values	API Name	Default	Chart Colors
Edit Del Deactivate	None	None	☐	Assigned dynamically
Edit Del Deactivate	Shipping	Shipping	☐	Assigned dynamically
Edit Del Deactivate	Billing	Billing	☒	Assigned dynamically
Edit Del Deactivate	Other	Other	☐	Assigned dynamically

Assign Account & Event Page Layouts to your Check-in Users' Profiles

- Check-in App includes pre-configured Account and Event Page Layouts:
 - “Account with Geolocation”
 - “Event / Check-in”
- Setup > Object Manager > Account > Page Layout > click “Page Layout Assignment”
- Edit assignment as required



Setup > OBJECT MANAGER

Account

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Page Layouts
6 Items, Sorted by Page Layout Name

Q Quick Find

New

Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	John Smith, 12/9/2016, 11:04 AM	
Account (Sales) Layout	John Smith, 12/9/2016, 11:04 AM	
Account (Support) Layout	John Smith, 12/9/2016, 11:04 AM	
Account Layout	John Smith, 12/9/2016, 11:04 AM	
Account with GeoLocation Layout	Anton, 3/26/2017, 5:28 AM	
Check-fleet Account Layout	John Smith, 8/29/2018, 11:06 AM	

Page Layout Assignment

Account

The table below shows the page layout assignments for different profiles.

Edit Assignment

Profiles	Page Layout
<u>Check-in Field Service User</u>	<u>Account with GeoLocation Layout (Installed Package: Check In)</u>
<u>Check-in force.com</u>	<u>Account with GeoLocation Layout (Installed Package: Check In)</u>
<u>Check-in Mobile User</u>	<u>Account with GeoLocation Layout (Installed Package: Check In)</u>
<u>check-in remi</u>	<u>Account with GeoLocation Layout (Installed Package: Check In)</u>
<u>Contract Manager</u>	<u>Account Layout</u>
<u>Cross Org Data Proxy User</u>	<u>Account Layout</u>

Add check in / check out buttons to Account page layout

- You may customize your own Account Page Layout
- Setup > Object Manager > Account > Page Layout >
- Click “Edit” to update an existing page layout

Account Page Layout

This page allows you to create different page layouts to display Account data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see

Account Page Layouts

NewPage Layout Assignment

Action	Page Layout Name	Installed Package
Edit Del	Account (Marketing) Layout	
Edit Del	Account (Sales) Layout	
Edit Del	Account (Support) Layout	
Edit Del	Account Layout	
Edit Del	Account with GeoLocation Layout	Check In
Edit Del	Account with GeoLocation Layout	<u>Check-in</u>
Edit Del	Korean Account with GeoLocation Layout	

Add check in / check out buttons to Account page layout

- Quick Actions: add Check-in & Check-out Actions
- Salesforce Mobile and Lightning Experience Actions: Add Check-in & Check-out buttons
- Save page layout

The screenshot shows the Salesforce Admin interface for editing the 'Account' page layout. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, Validation Rules, and Hierarchy Columns.

The main area displays the 'Account with GeoLocation Layout'. At the top, there are tabs for 'Mini Page Layout', 'Mini Console View', 'Video Tutorial', and 'Help for this Page'. Below these are buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'.

The 'Fields' section on the left lists: Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. The main area shows a table of fields with columns: Section, Account Owner, Active, Clean Status, Data.com Key, and Fa. The fields listed are: Blank Space, Account Name, Account Site, Account Number, Account Record Type, Annual Revenue, Billing Address, Customer Priority, D-U-N-S Number, Check-In Geolocat..., D&B Company, and Employees.

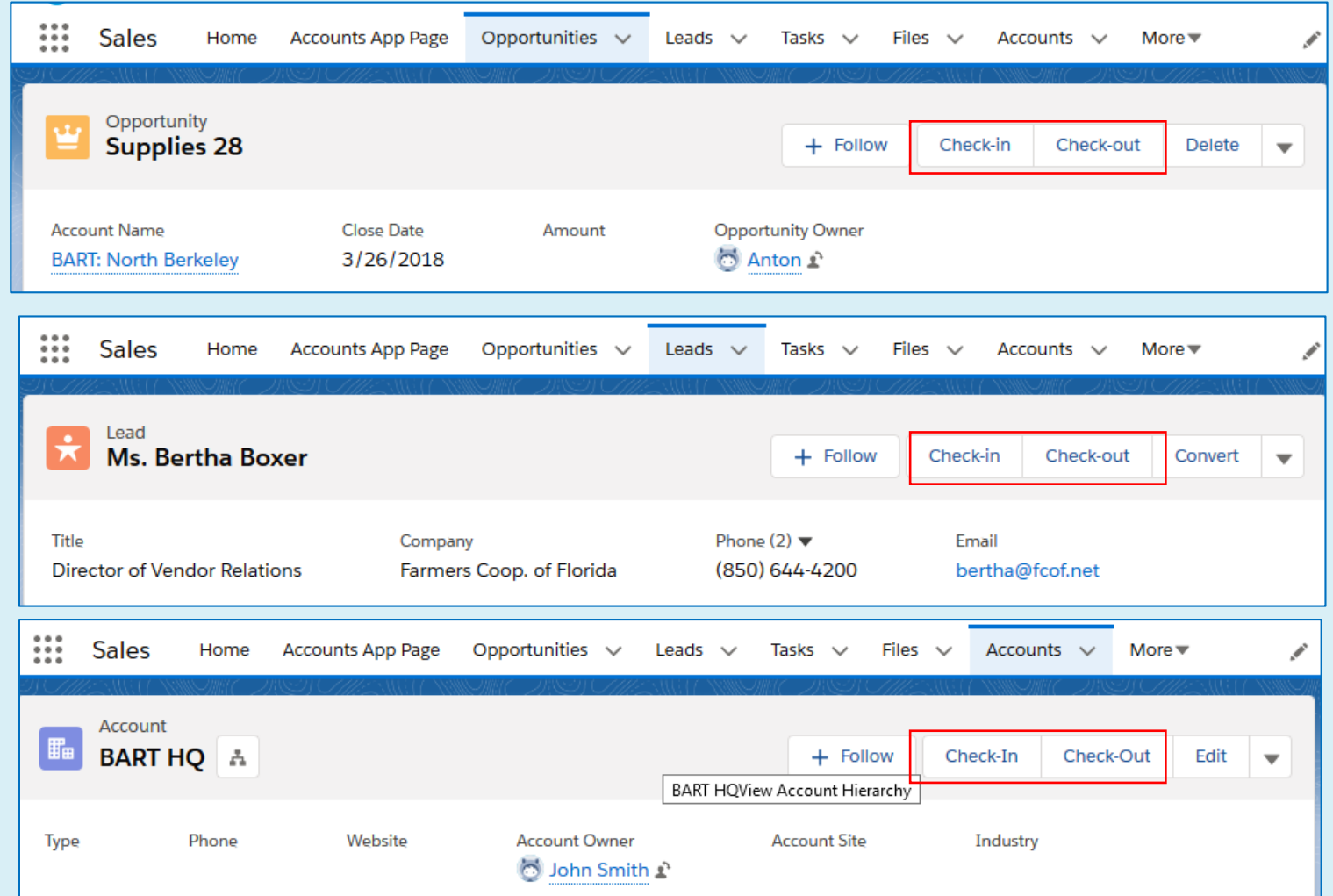
Below the fields table, there is a 'Highlights Panel' section with a placeholder text: 'Customize the highlights panel for this page layout...'. Below this, there are two sections for adding actions:

- Quick Actions in the Salesforce Classic Publisher** (with an information icon): This section contains three buttons: 'Post', 'Check-In', and 'Check-Out'.
- Salesforce Mobile and Lightning Experience Actions** (with an information icon): This section also contains three buttons: 'Post', 'Check-In', and 'Check-Out'.

At the bottom of the page, there are additional buttons: 'New Event', 'Edit', 'Delete', and 'Change Owner'.

Check-in / Check-out buttons on Account, Opportunity, Contact, Lead

➤ Does not work with Custom Objects



The following table summarizes the information shown in the three screenshots:

Object Type	Object Name	Check-in Button	Check-out Button	Other Buttons
Opportunity	Supplies 28	Yes	Yes	+ Follow, Delete
Lead	Ms. Bertha Boxer	Yes	Yes	+ Follow, Convert
Account	BART HQ	Yes	Yes	+ Follow, Edit

Screenshot 1: Opportunity Detail
 The top navigation bar shows 'Opportunities' selected. The object is 'Supplies 28'. The 'Check-in' and 'Check-out' buttons are highlighted with a red box. Below the buttons, the 'Account Name' is 'BART: North Berkeley', 'Close Date' is '3/26/2018', 'Amount' is empty, and 'Opportunity Owner' is 'Anton'.

Screenshot 2: Lead Detail
 The top navigation bar shows 'Leads' selected. The object is 'Ms. Bertha Boxer'. The 'Check-in' and 'Check-out' buttons are highlighted with a red box. Below the buttons, the 'Title' is 'Director of Vendor Relations', 'Company' is 'Farmers Coop. of Florida', 'Phone (2)' is '(850) 644-4200', and 'Email' is 'bertha@fcof.net'.

Screenshot 3: Account Detail
 The top navigation bar shows 'Accounts' selected. The object is 'BART HQ'. The 'Check-In' and 'Check-Out' buttons are highlighted with a red box. Below the buttons, the 'Type' is empty, 'Phone' is empty, 'Website' is empty, 'Account Owner' is 'John Smith', 'Account Site' is empty, and 'Industry' is empty. A tooltip 'BART HQView Account Hierarchy' is visible over the 'Check-In' button.

Enable Geocode Trigger

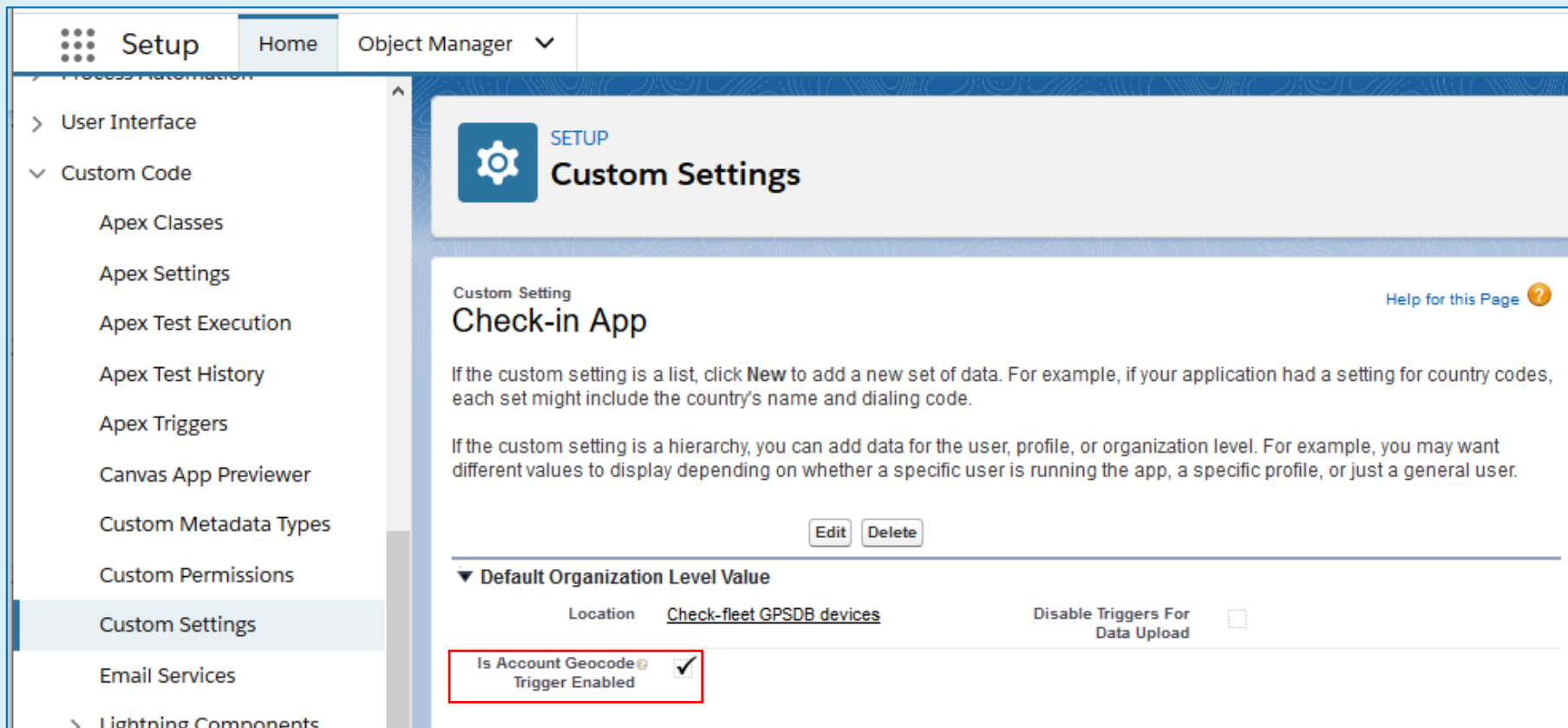
- Go to Setup > Custom Code > Custom Settings
- “Check-in App”, click “Manage”

The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with the following items: Setup, Home, Object Manager, Process Automation, User Interface, Custom Code (expanded), Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Canvas App Previewer, Custom Metadata Types, Custom Permissions, Custom Settings (selected), and Email Services. The main content area displays the 'Custom Settings' page. It includes a header with the 'SETUP' icon and 'Custom Settings' title. Below this is a description: 'Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom data is stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom data can be used by formula fields, Visualforce, Apex, and the Web Services API.' There is a 'Get Usage' button. Below the description is a 'View' dropdown set to 'All' and a 'Create New View' link. At the bottom is a table with columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, and Number of Records. The table contains one row for 'Check-in App' with a 'Manage' button and a dropdown arrow next to the label.

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records
Manage	Check-in App	Public	Hierarchy	chqin		120	1

Enable Geocode Trigger (Continued)

- Check that “Is Account Geocode Trigger Enabled” is checked
- If not, Check-in App will ignore the Salesforce Geocoded Addresses.

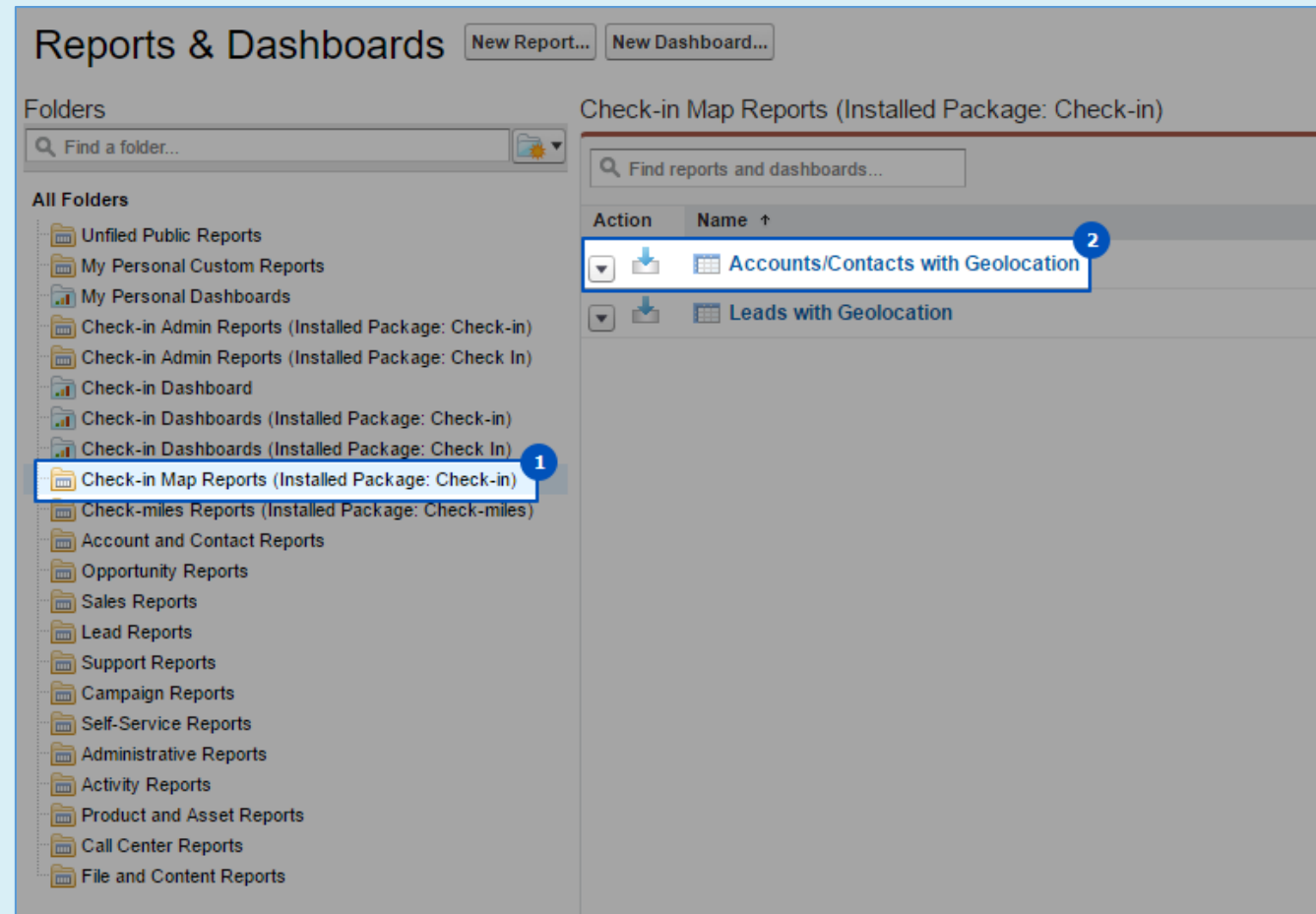


The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Process Automation, User Interface, Custom Code, Apex Classes, Apex Settings, Apex Test Execution, Apex Test History, Apex Triggers, Canvas App Previewer, Custom Metadata Types, Custom Permissions, Custom Settings (highlighted), Email Services, and Lightning Components. The main content area is titled 'Custom Settings' and shows the 'Check-in App' custom setting. The 'Default Organization Level Value' section is expanded, showing a table with the following data:

Location	Check-in App	Disable Triggers For Data Upload
Check-fleet GPSDB devices	Is Account Geocode Trigger Enabled ☒	☐

Run Report “Accounts/Contact with Geolocation”

- Go to Reports > Check-in Map Reports > Accounts/Contacts with Geolocation



Run Report “Accounts/Contact with Geolocation”

- If the Salesforce Geocode service is working properly the Latitude / Longitude fields for Account Addresses (Billing and Shipping) and contact address should be populated.
- For Accounts, the custom field “Geocode Address” should be populated with either Shipping or Billing, otherwise the Check-in App will not know which address to display (shipping or billing) and neither will be displayed.
- This applies to both Reports Map and the Event Map if user checks in on an account.

Run Report ▼ Hide Details Customize Save Save As Delete Printable View Export Details Subscribe										
Account Name	Full Name	GeoCodeAddress	Check-In Geolocation Other (Latitude)	Check-In Geolocation Other (Longitude)	Shipping Latitude ↕	Shipping Longitude	Billing Longitude	Billing Latitude	Mailing Latitude	Mailing Longitude
Cox's Cash & Carry Newbridge		Shipping	-	-	53.201235630808920	-6.755893548405163	-	-	-	-
Pyramid Construction Inc.	Pat Stumuller	Billing	-	-	48.846272583246380	2.354964359768112	2.354964359768112	48.846272583246380	48.846272583246380	2.354964359768112
Test3 Not Geocoded		Billing	-	-	38.111959000000000	-122.568216000000000	-	-	-	-
Pittsburg/Bay Point		Billing	-	-	38.017389000000000	-121.949717000000000	-121.949717000000000	38.017389000000000	-	-
North Concord/Martinez		Billing	-	-	38.004427000000000	-122.023742000000000	-122.023742000000000	38.004427000000000	-	-
Concord		Billing	-	-	37.974370000000000	-122.028500000000000	-122.028500000000000	37.974370000000000	-	-
Richmond		Billing	-	-	37.941300000000000	-122.370800000000000	-122.370800000000000	37.941300000000000	-	-

Customize Report “Accounts/Contact with Geolocation”

- To view accounts without related Contacts, customize report and remove all fields from the Contact Object, save, and then run the report.

Run Report

Hide Details

Customize

Save

Save As

Delete

Printable View

Export Details

Subscribe

Account Name	Full Name	GeoCodeAddress	Check-In Geolocation Other (Latitude)	Check-In Geolocation Other (Longitude)	Shipping Latitude +	Shipping Longitude	Billing Longitude	Billing Latitude	Mailing Latitude	Mailing Longitude
Cox's Cash & Carry Newbridge		Shipping	-	-	53.201235630808920	-6.755893548405163	-	-	-	-
Pyramid Construction Inc.	Pat Stumuller	Billing	-	-	48.846272583246380	2.354964359768112	2.354964359768112	48.846272583246380	48.846272583246380	2.354964359768112
Test3 Not Geocoded		Billing	-	-	38.111959000000000	-122.568216000000000	-	-	-	-
Pittsburg/Bay Point		Billing	-	-	38.017389000000000	-121.949717000000000	-121.949717000000000	38.017389000000000	-	-
North Concord/Martinez		Billing	-	-	38.004427000000000	-122.023742000000000	-122.023742000000000	38.004427000000000	-	-
Concord		Billing	-	-	37.974370000000000	-122.028500000000000	-122.028500000000000	37.974370000000000	-	-
Richmond		Billing	-	-	37.941300000000000	-122.370800000000000	-122.370800000000000	37.941300000000000	-	-


Report Type: Accounts & Contacts with Geolocation
Accounts/Contacts with Geolocation
Guided Tour | Video Tutorial | Help

1

Save

Save As

Close

Report Properties

Add Report Type

2

Run Report

Fields

All #

Drag and drop to add fields to the report.

Bucket Fields

Add Bucket Field

Accounts

Account ID

Account Name

Account Number

Account Owner: Full Name

Billing Address

Billing City

Billing Country

Billing Geocode Accuracy

Billing Latitude

Billing Longitude

Billing State/Province

Billing Street

Filters

Add

Show

All accounts

Date Field

Birthdate

Range

All Time

From

To

To add filters, click Add.

Preview

Tabular Format ▾

Show ▾

Remove All Columns

Account Name	GeoCodeAddress	Latitude for Checkin Maps	Longitude for Checkin Maps	Shipping Latitude +	Shipping Longitude	Billing Longitude	Billing Latitude
Pyramid Construction Inc.	Billing	48.8462725832	2.3549643598	48.846272583246380	2.354964359768112	2.354964359768112	48.846272583246380
Pittsburg/Bay Point	Billing	38.0173890000	-121.9497170000	38.017389000000000	-121.949717000000000	-121.949717000000000	38.017389000000000
North Concord/Martinez	Billing	38.0044270000	-122.0237420000	38.004427000000000	-122.023742000000000	-122.023742000000000	38.004427000000000
Pleasant Hill/Contra Costa Centre	Billing	37.9291270000	-122.0556530000	37.929127000000000	-122.055653000000000	-122.055653000000000	37.929127000000000
Salesforce Brazil	Shipping	37.9047770000	-122.2788030000	37.904777000000000	-122.278803000000000	-46.709532177820480	-23.664810937400404
Salesforce China	Shipping	37.9047770000	-122.2788030000	37.904777000000000	-122.278803000000000	116.715280000010320	39.859399999861350

Check-in App Custom Setup (Continued)

- “Event / Check-in Layout” includes (see next slide):

- Mobile & Lightning Actions
- Check-in App Custom Fields (Check-in / out Time, Location, Distance, Visit Duration, Check-in Status, LocateMobilePhone)
- Event Map: Displays Account and User Check-in location

- “Page Layout Assignment”

- All Profiles (Users) are currently assigned the “Event Layout”
- Assign the “Event / Check-in Layout” to PROFILES of Check-in App Users

The screenshot shows the Salesforce Lightning Setup interface for the 'Event' object. The breadcrumb trail is 'SETUP > OBJECT MANAGER > Event'. The left sidebar contains a list of setup categories: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Search Layouts, Triggers, and Validation Rules. The main content area is titled 'Page Layouts' and shows '2 Items, Sorted by Page Layout Name'. It contains a table with the following data:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Event / Check-In Layout	Anton, 3/26/2017, 5:28 AM	John Smith, 7/26/2018, 2:20 PM	▼
Event Layout	John Smith, 12/9/2016, 11:04 AM	John Smith, 7/26/2018, 2:18 PM	▼

Check-in App Custom Setup (Continued)

“Event / Check-in Layout” includes:

- “Check-in” & “Check-out” Mobile & Lightning Actions
- Check-in App Custom Fields [Check-in / out details: Time, Location, Distance, Check-in Status, LocateMobilePhone (see next slide)]
- Event Map with Account (blue marker) and User Check-in location (red cell phone icon)

The screenshot shows the Salesforce interface for an event check-in. The top navigation bar includes standard Salesforce tabs like Sales, Home, Accounts, etc. The event details section shows the event name 'CheckIn at 2019-09-05 14:54:29' and the related account 'BART: Orinda'. A red box highlights the 'Check-In / Check-Out Details' section, which contains the following information:

Check-In / Check-Out Details	
Check-In Time	9/5/2019 2:54 PM
Check-In Location	1 Ardmore Road, Kensington, California 94707
Check In Distance	9.1078
Check-Out Time	9/5/2019 2:54 PM
Check-Out Location	1 Ardmore Road, Kensington, California 94707
Check Out Distance	9.1061
Visit Duration (Minutes)	1

Below the details is a 'Visit Checklist' section. At the bottom, a map titled 'Map (3)' displays the check-in location (red cell phone icon) and the user location (blue marker). The map shows the area around Berkeley, California, with various landmarks and parks labeled. A red arrow points to the red cell phone icon, and a blue arrow points to the blue marker.

Check-in App Custom Setup (Continued)

Account:

- For use with the Check-in App, an Account Page Layout must include the Check-in App “Mobile & Lightning Action” buttons (see adjacent screenshot) and Custom Fields (see next page)
- Included with Check-in App is the “Account with Geolocation” Page Layout, pre-configured with the Actions and Custom Fields

Account Record Types:

- The page layout for a Record Type that will be used with Check-in App must be modified as described above.

Setup > Object Manager > Account

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

Account with GeoLocation Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Add to Call List	Change Record Type	Create Geofence	Email (mobile only)	Include Offline	New Account	New Group	New Task	Question
Add to Campaign	Check for New Data	Delete	File	Link	New Case	New Lead	Poll	Send Text
Call	Check-In	Edit	Get Contacts	Log a Call	New Contact	New Note	Post	Sharing Text
Change Owner	Check-Out	Email	Get Survey Invitations	Mobile Smart Actions	New Event	New Opportunity	Printable View	Submit for Review

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post Check-In Check-Out New Event

Salesforce Mobile and Lightning Experience Actions

Post Check-In Check-Out New Event Edit Delete Change Owner

Sales Home Accounts App Page Opportunities Leads Tasks Files Accounts Contacts Campaigns More

Account BART: Orinda

+ Follow Check-In Check-Out Edit

Type Phone Website Account Owner John Smith Account Site Industry

Check-in App Custom Setup (Continued)

- For use with the Check-in App, Account Custom Fields.
- The 3 Custom Fields should be included in Account Page Layout of ALL Account Record Type for use with Check-in App.

The screenshot displays the Salesforce 'Account' custom setup page. The left sidebar shows the navigation menu with 'Page Layouts' selected. The main area is titled 'Account with GeoLocation Layout'. A table lists various fields, with 'GeoCodeAddress', 'Latitude for Checkin', and 'Longitude for Checkin' highlighted with red boxes. Below the table, the 'Account Sample' preview shows the layout of the account page, including a highlights panel, quick actions, and account details. The 'GeoLocation' section at the bottom of the preview shows the values for 'Latitude for Checkin' and 'Longitude for Checkin', which are also highlighted with red boxes.

Fields Table:

Field Name	Field Type	Field Label	Field Format
Account Owner	Text	Account Owner	
Account Record Type	Text	Account Record Type	
Annual Revenue	Text	Annual Revenue	
Account Name	Text	Account Name	
Account Site	Text	Account Site	
Account Number	Text	Account Number	
Account Source	Text	Account Source	
Check-In Geolocation	Text	Check-In Geolocation	
D&B Company	Text	D&B Company	
Employees	Text	Employees	
Is Create Geofence	Text	Is Create Geofence	
GeoCodeAddress	Text	GeoCodeAddress	
Latitude for Checkin	Text	Latitude for Checkin	
Longitude for Checkin	Text	Longitude for Checkin	
NAICS Code	Text	NAICS Code	
Parent Account	Text	Parent Account	
Shipping Address	Text	Shipping Address	
SLA Expiration Date	Text	SLA Expiration Date	

Account Sample Preview:

Highlights Panel: Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher: Post, Check-In, Check-Out, New Event

Salesforce Mobile and Lightning Experience Actions: Post, Check-In, Check-Out, New Event, Edit, Delete, Change Owner

Account Detail: Standard Buttons: Edit, Change Owner, Change Record Type, Delete, View Account Hierarchy, Sharing, Include Offline, Get Survey Invitation, Check for New Data, View Partner Scorecard, Add to Call List, Printable View. Custom Buttons: (Empty)

Account Information (Header visible on edit only):

Account Owner	Sample Text	Rating	Sample Text
Account Name	Sample Text	Phone	1-415-555-1212
Account Site	Sample Text	Fax	1-415-555-1212
Type	Sample Text	Website	www.salesforce.com
Parent Account	Sample Text	Ownership	Sample Text

GeoLocation:

Latitude for Checkin	0.0000011504	GeoCodeAddress	Sample Text
Longitude for Checkin	0.0000053374		

Check-in App Custom Setup (Continued)

Check-in App Permission Set (slide #25) grants access to (1) and (2) below:

The Profile of a Check-in App User must have:

1. Access to Check-in App Custom Objects and all Custom Fields in those objects:
 1. Mobile Phone (chqin__MobilePhone__c)
 2. Previous Locate (chqin__Locate_Mobile_Phone__c)
2. Access to the Check-in App Custom Fields on Account & Event
 1. Setup > Security > Field Level Security
3. For a User with a Profile “X” to Check-in on an Account with a Record Type, the Account Page Layout assigned to Profile “X” must include the Account Check-in App custom fields (p42)

Check-in App Custom Setup (Continued)

“Event Custom Fields”:

- The Profiles of Check-in App users must have access to Custom Fields on the Event.

Field accessibility for Profile: System Administrator

Click on a cell in the table below to change the field's accessibility.

Fields	Field Access
All-Day Event	Editable
Assigned To	Required
Attendees	Editable
Check In Distance	Read-Only
Check-In Location	Read-Only
Checkin Status	Read-Only
Check-In Time	Read-Only
Check Out Distance	Read-Only
Check-Out Location	Read-Only
Check-Out Time	Read-Only
Created By	Read-Only
Date	Required
Description	Editable
Did you meet decision maker?	Editable
Do they sell competitive products? which	Editable
Duration	Required
Email	Read-Only
End	Required
Event Subtype	Editable
Interested in our products?	Editable
Last Modified By	Read-Only
Locate Mobile Phone	Read-Only
Location	Editable
Name	Read-Only
Phone	Read-Only
Private	Editable
Related To	Read-Only
Reminder Set	Editable
Repeat	Editable
Show Time As	Editable
Start	Required
Subject	Editable
Time	Required
Type	Hidden
Visit Duration (Minutes)	Read-Only
Fields	Field Access