GPSDASHBOARD

CHECK- in

Powered by GEOTAB

Check-in Admin Guide

AVAILABLE ON

salesforce appexchange

October 2019

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(877) 937-3654 X2

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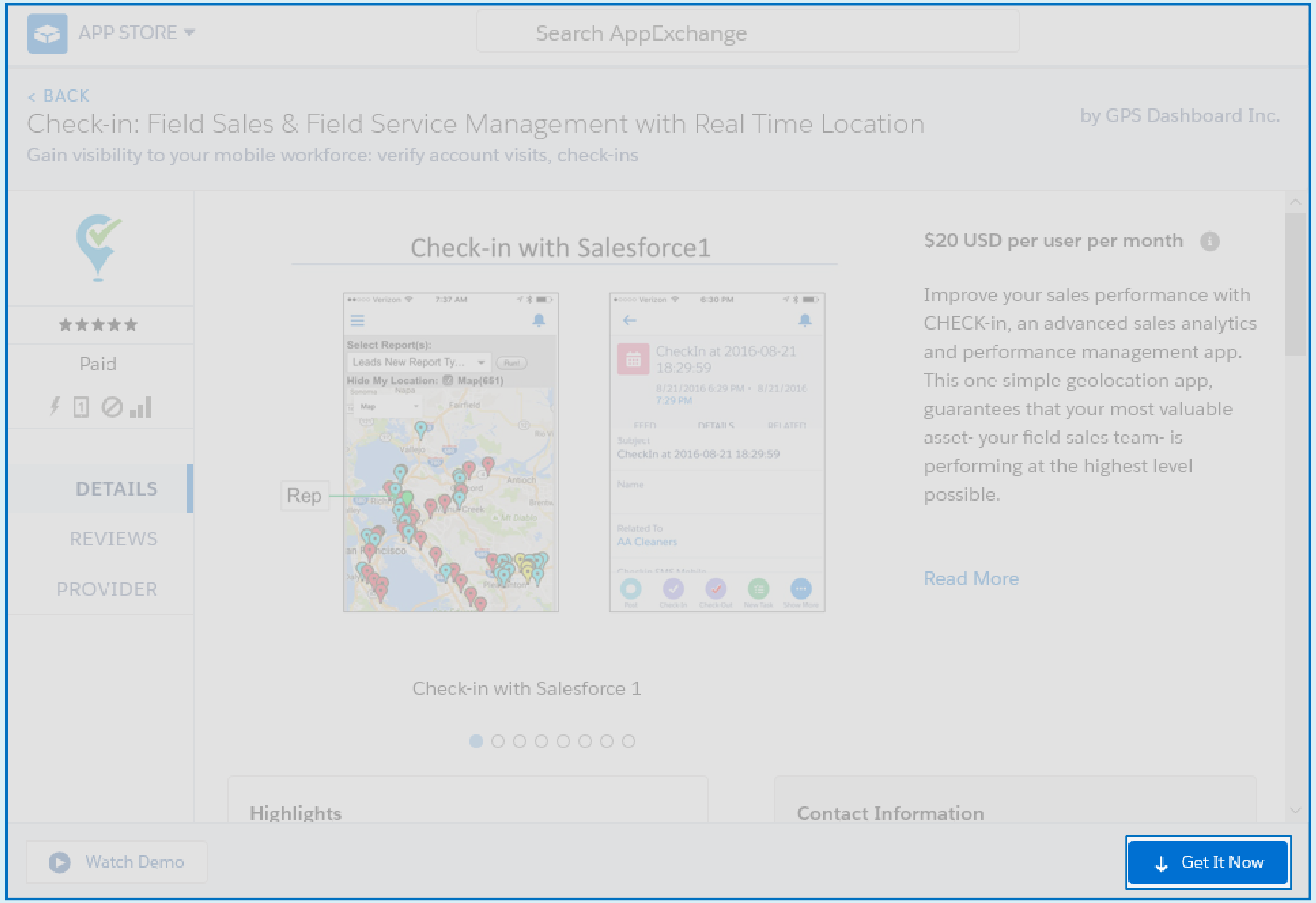
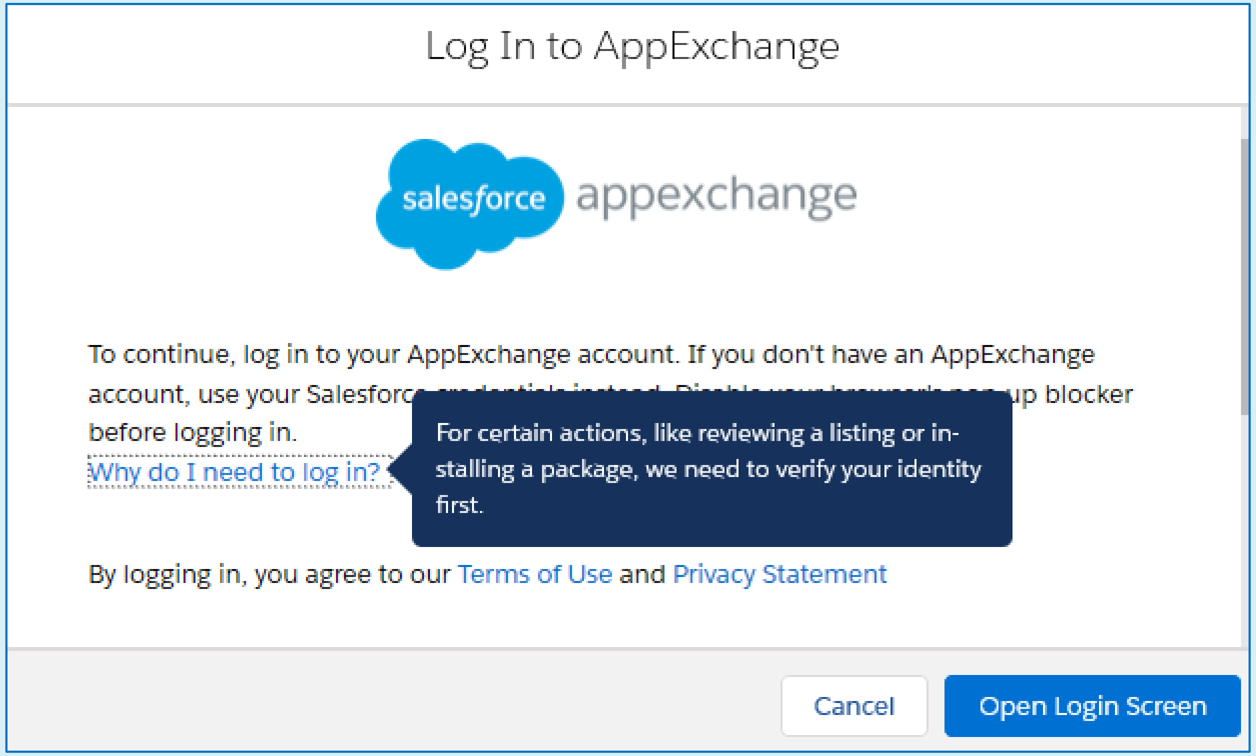
Install Check-in from the AppExchange

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



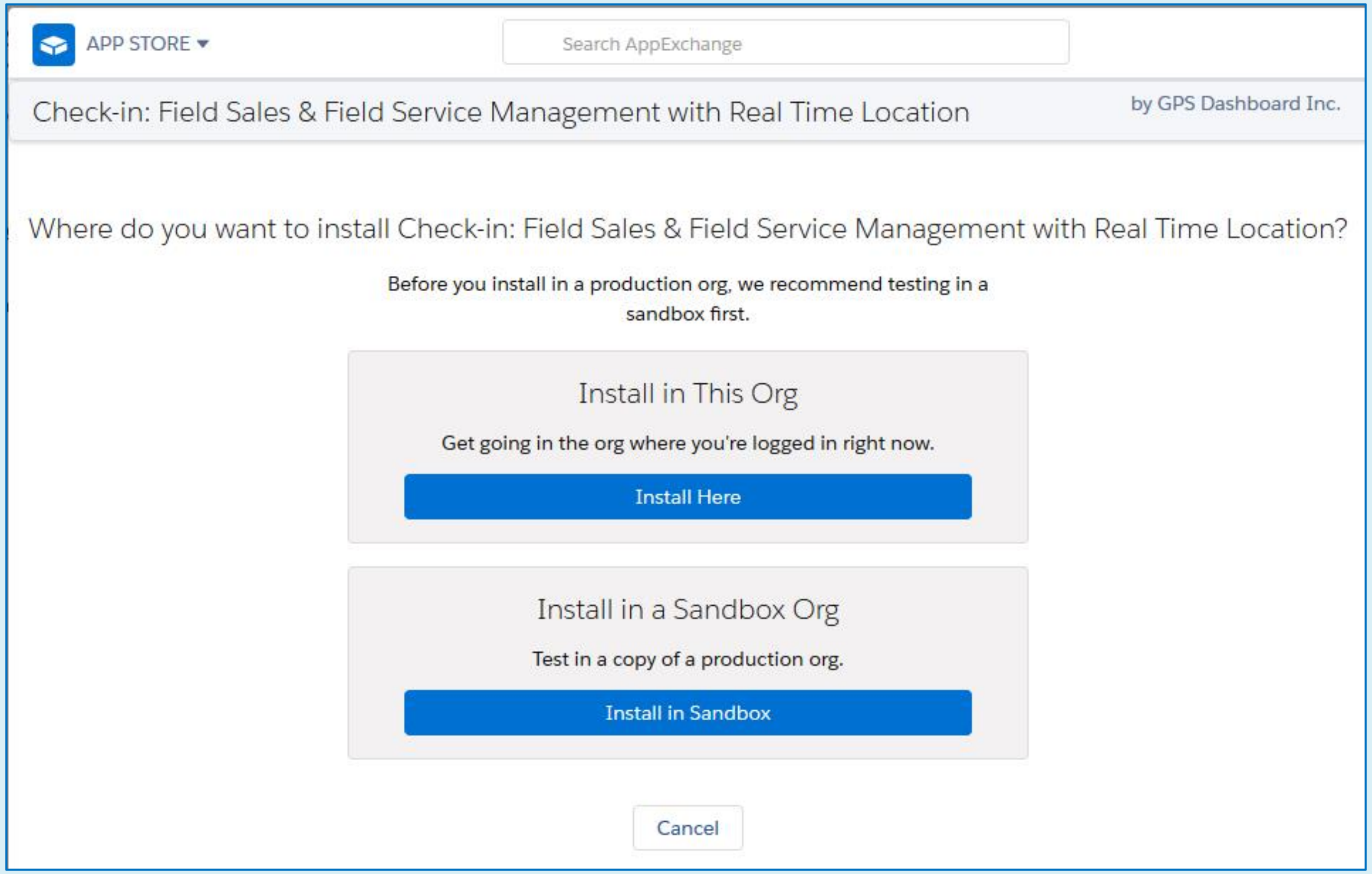
Install Check-in from the AppExchange

- Enter your salesforce credentials



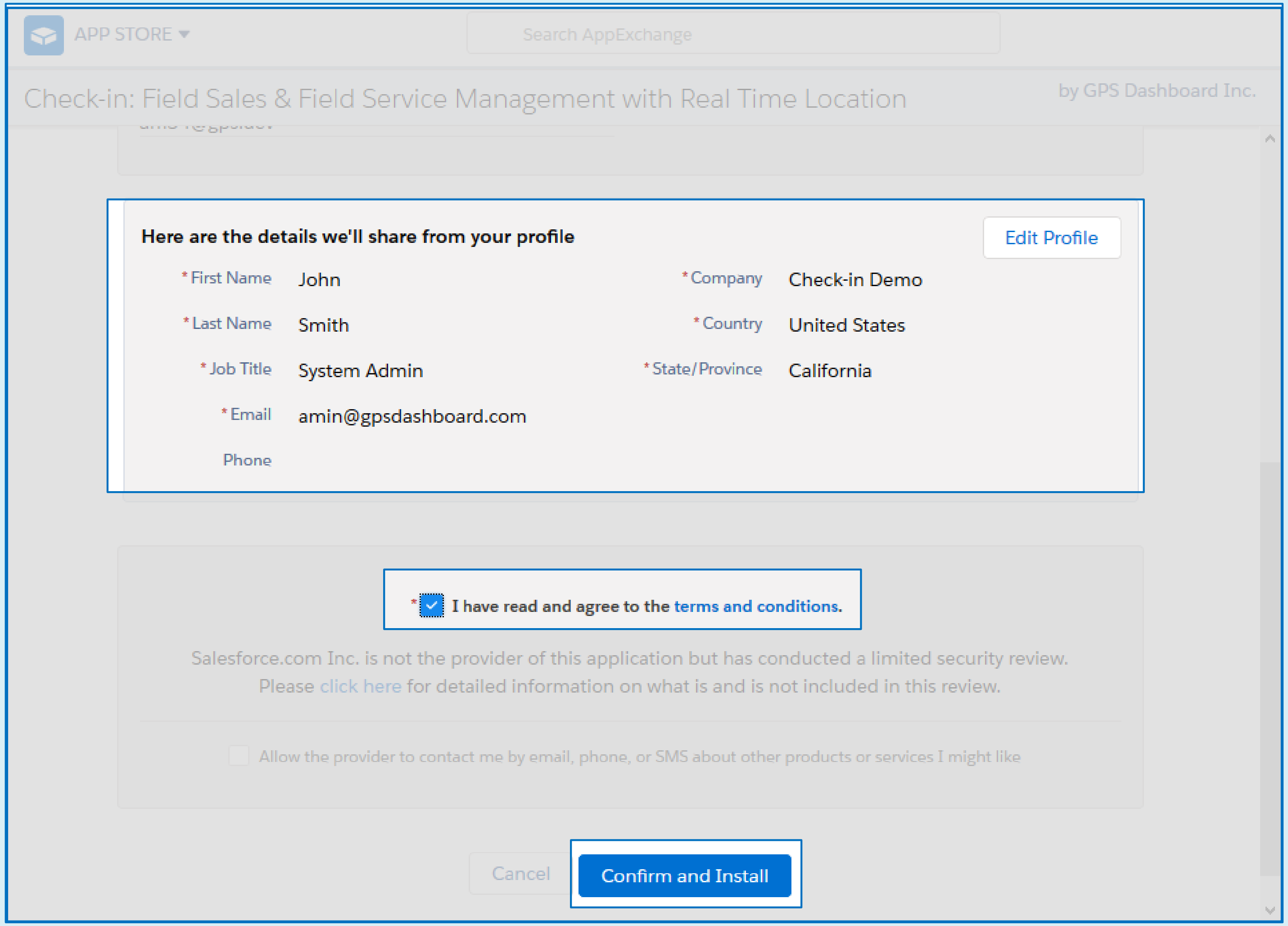
Install Check-in from the AppExchange

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



Install Check-in from the AppExchange

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



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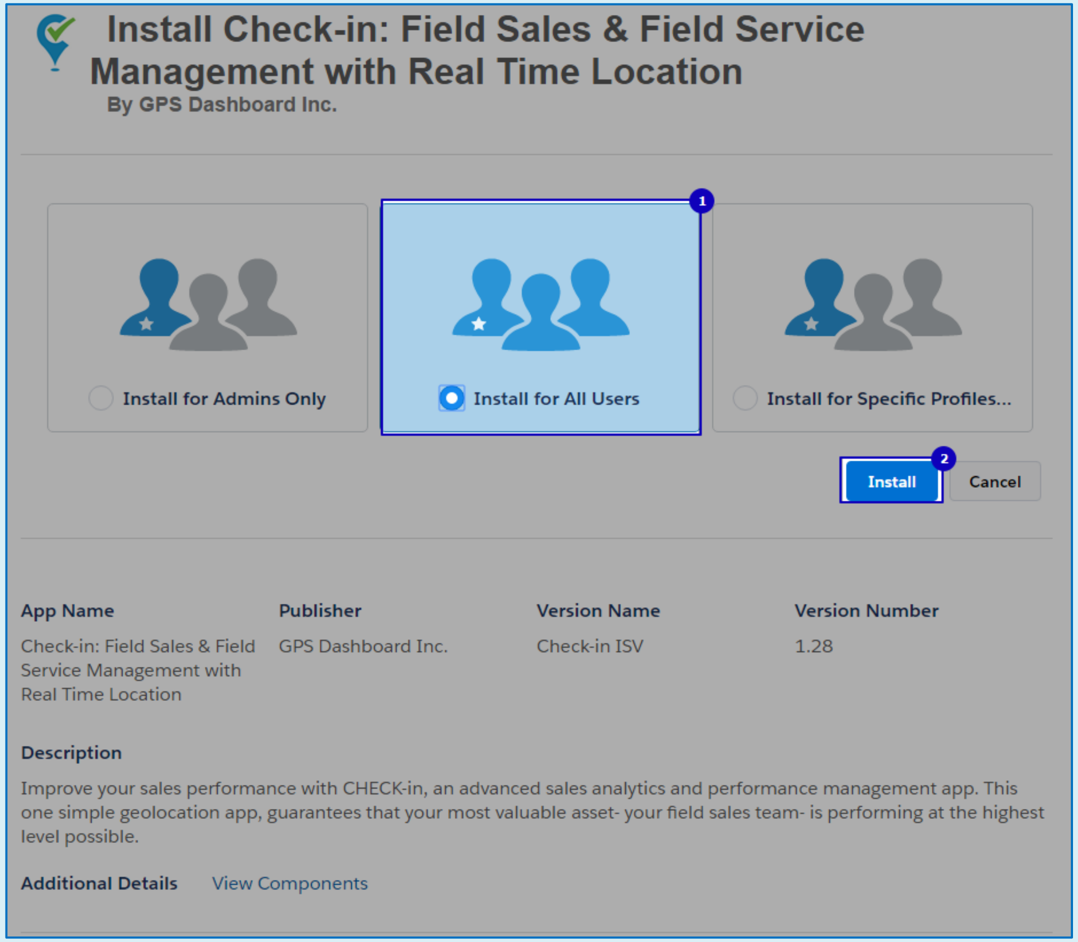
Install Check-in from the AppExchange

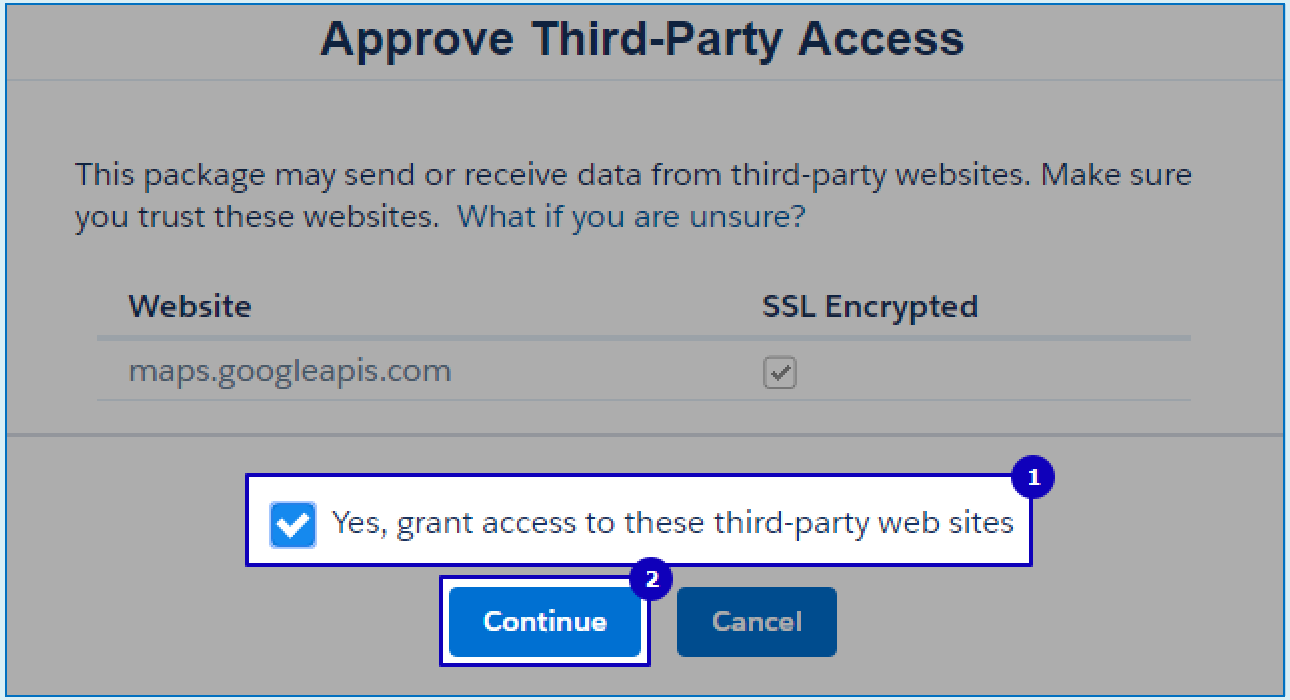
- Select “Install for All Users”, click “Install”

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



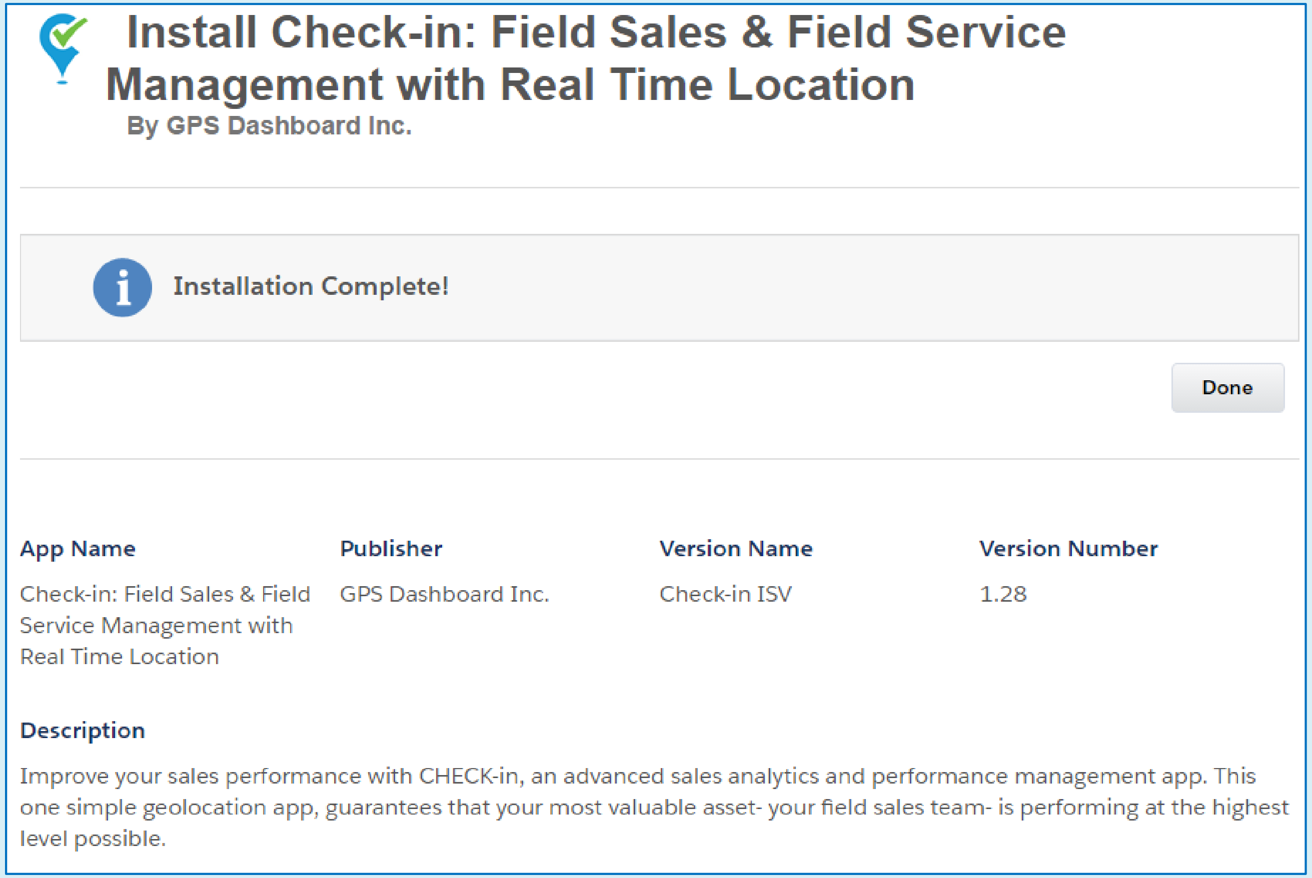
Install Check-in from the AppExchange

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



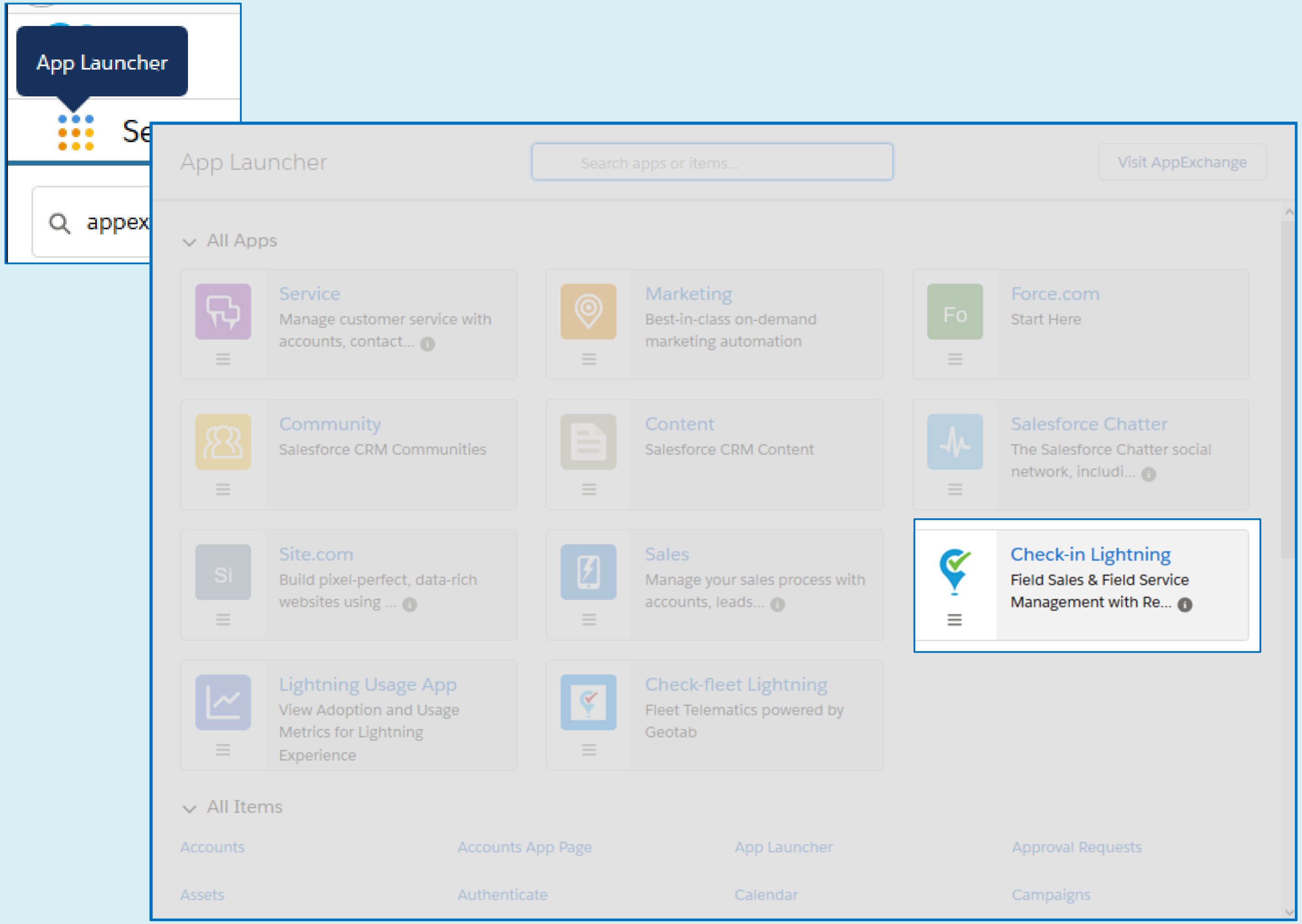
Install Check-in from the AppExchange

➢ Wait for the “Installation Complete” message



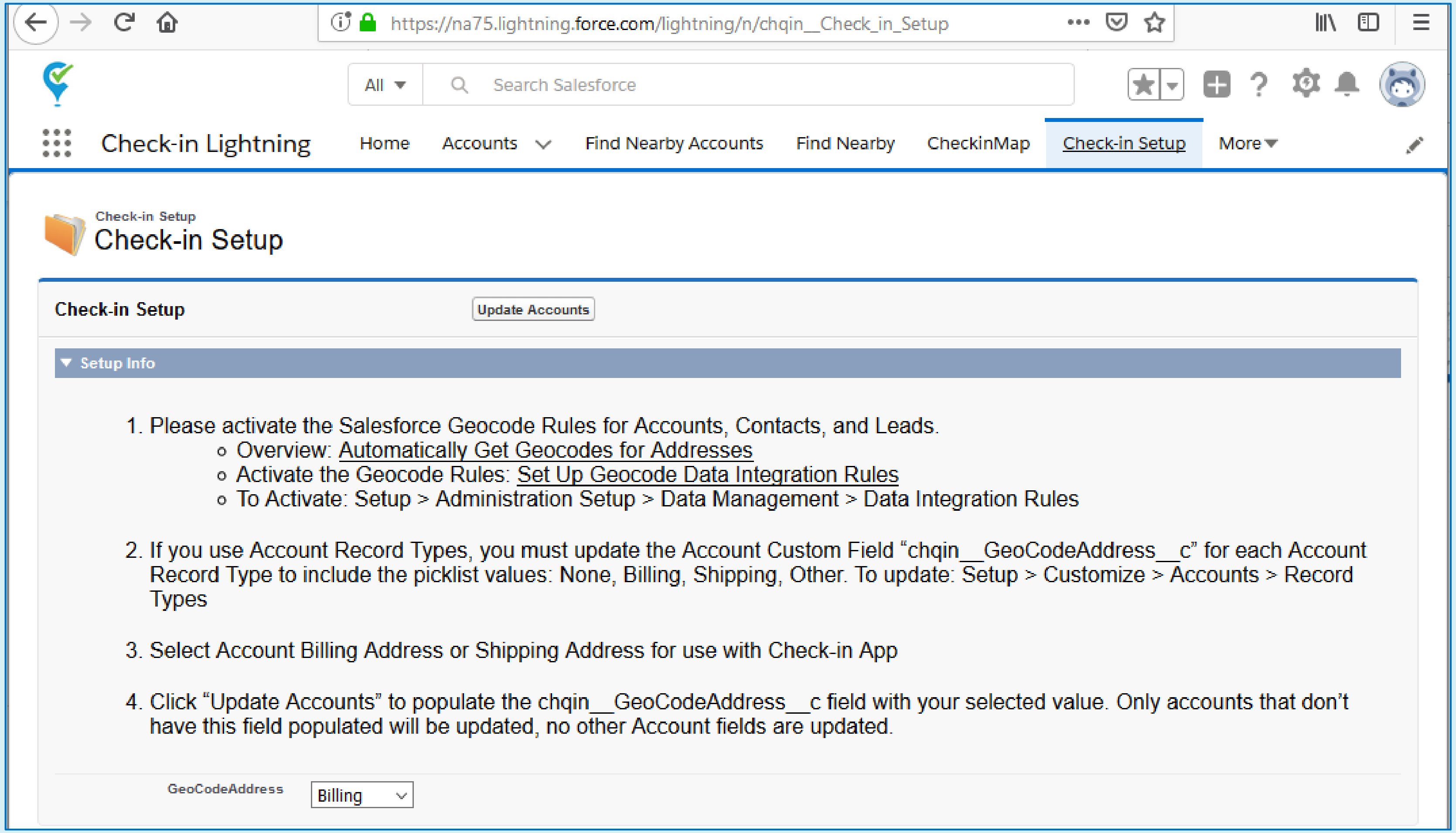
Launch Check-in App

- Click "App Launcher"
- Click "Check-in Lightning"



Check-in Setup

- Click Tab “Check-in Setup”



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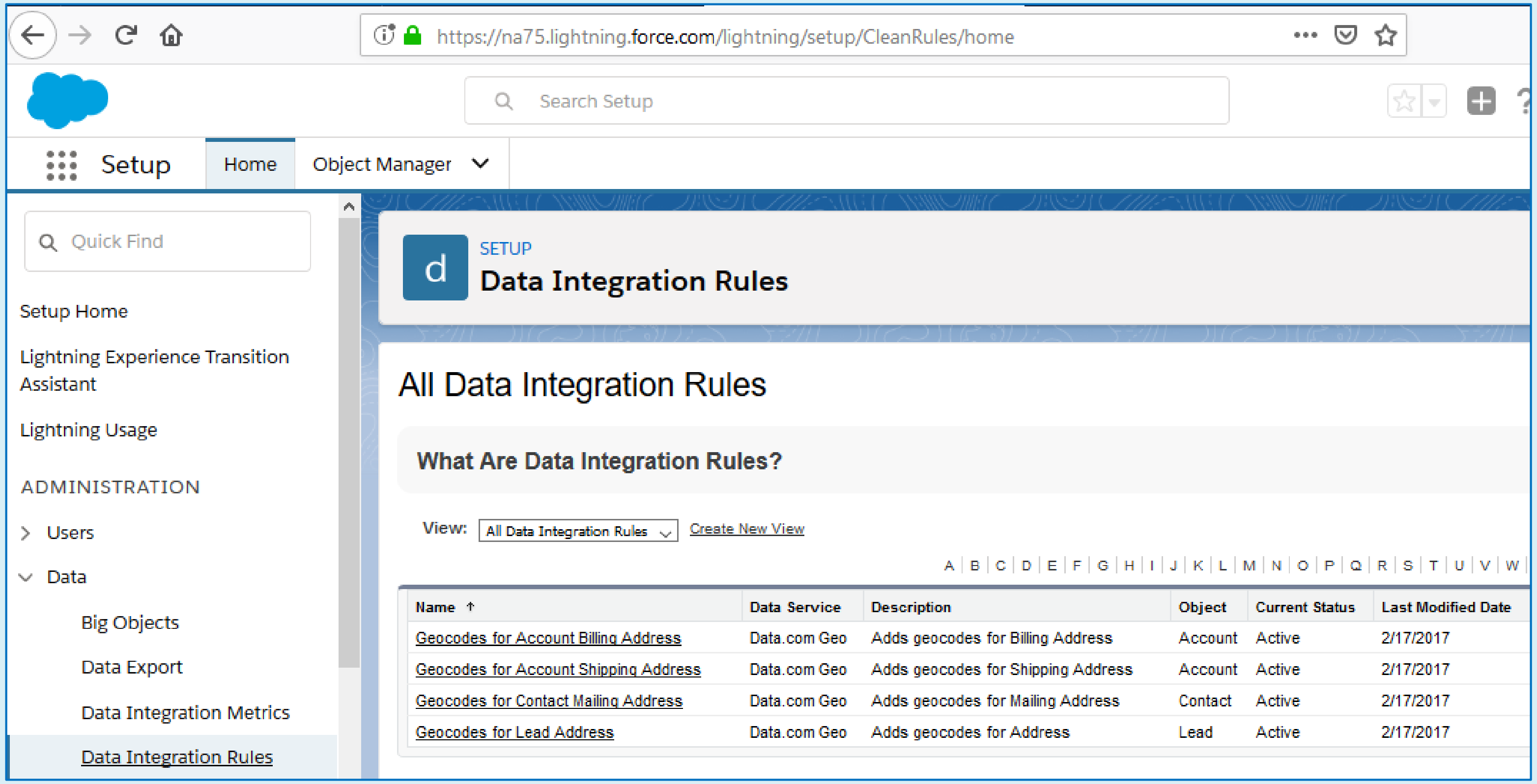
Activate "Data Integration Rules"

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



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Activate Data Integration Rules

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

All Data Integration Rules

What Are Data Integration Rules?

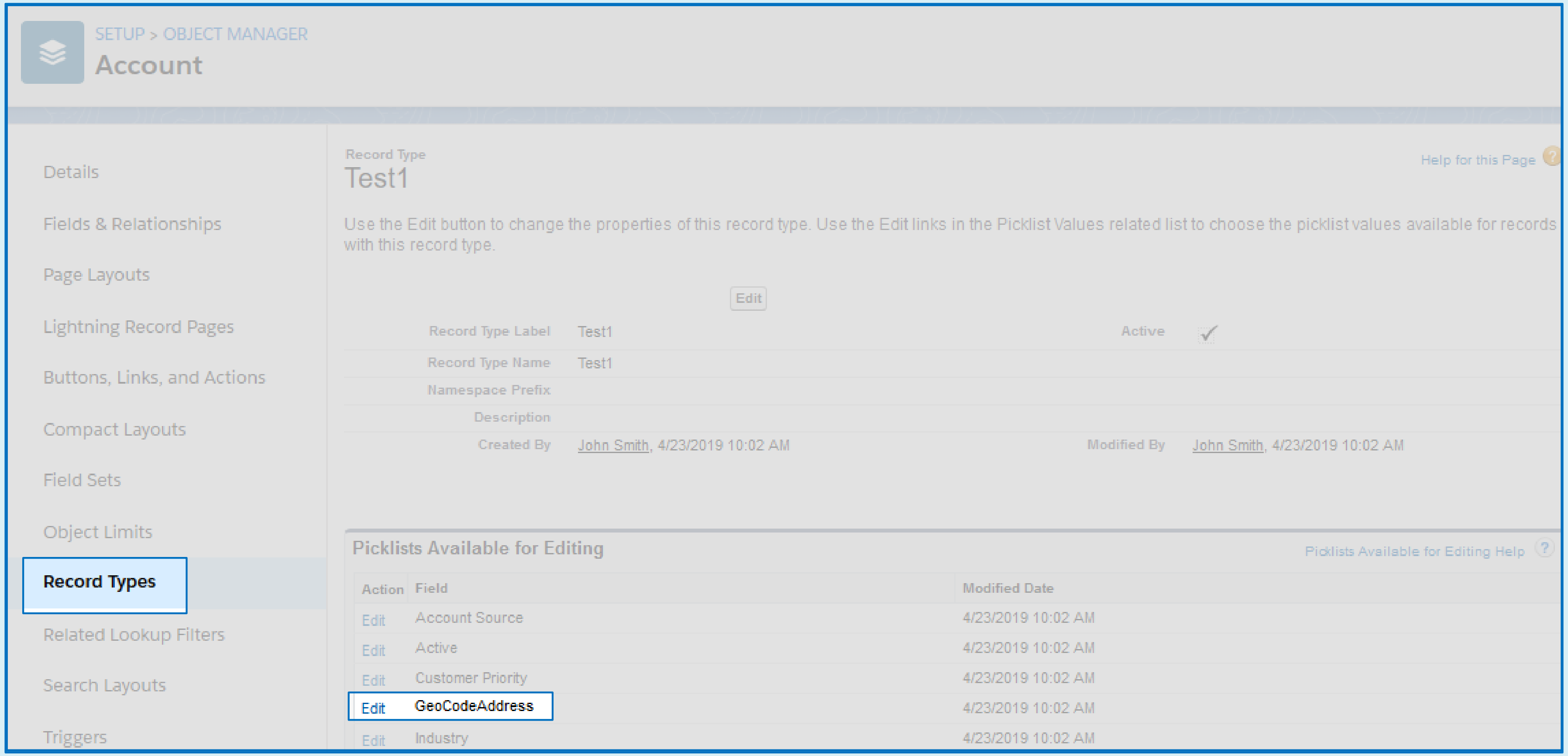
View: All Data Integration Rules | Create New View

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

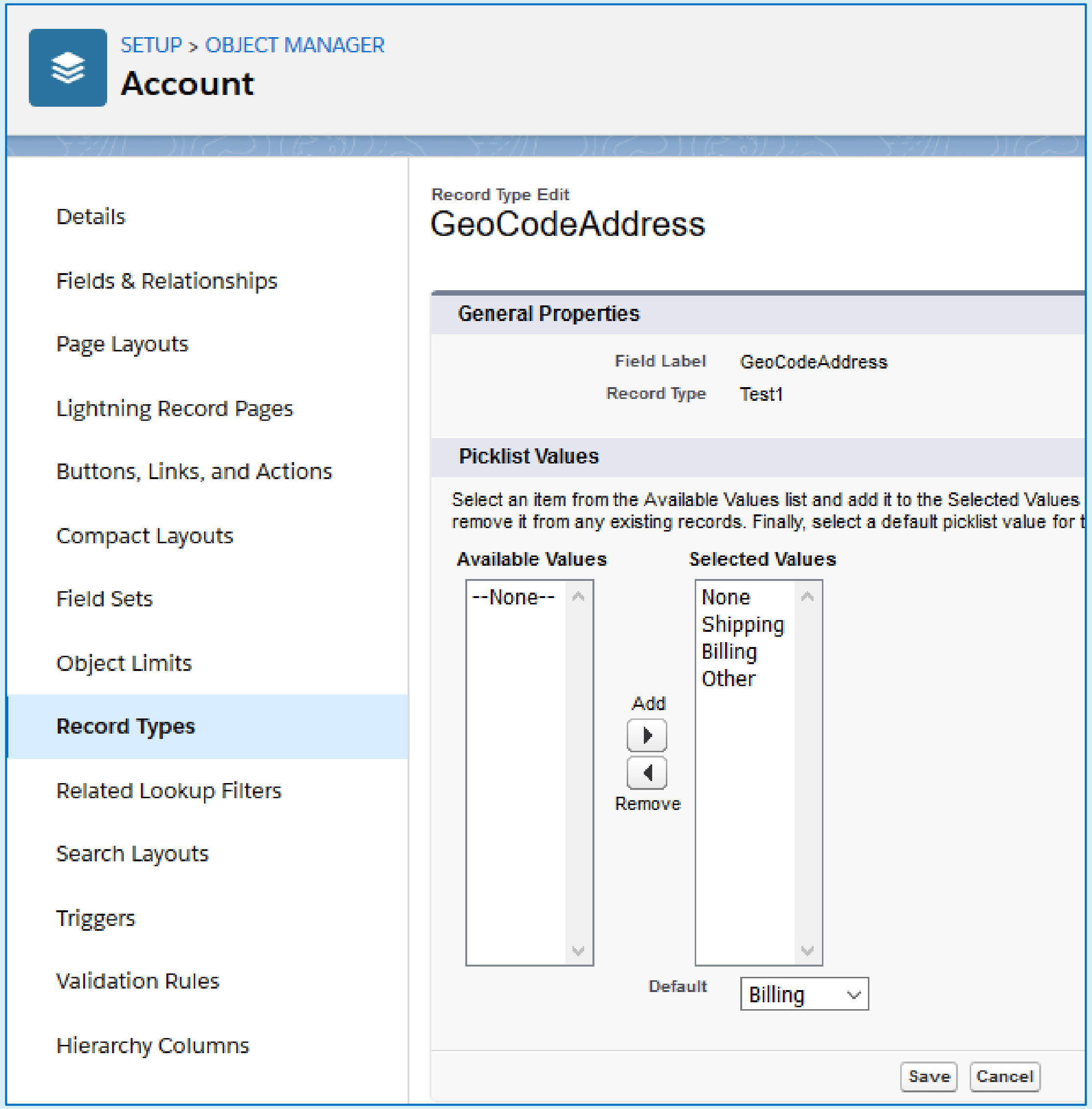
Name ↑	Data Service	Description	Object	Current Status	Last Modified Date
Geocodes for Account Billing Address	Data.com Geo	Adds geocodes for Billing Address	Account	Active	2/17/2017
Geocodes for Account Shipping Address	Data.com Geo	Adds geocodes for Shipping Address	Account	Active	2/17/2017
Geocodes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

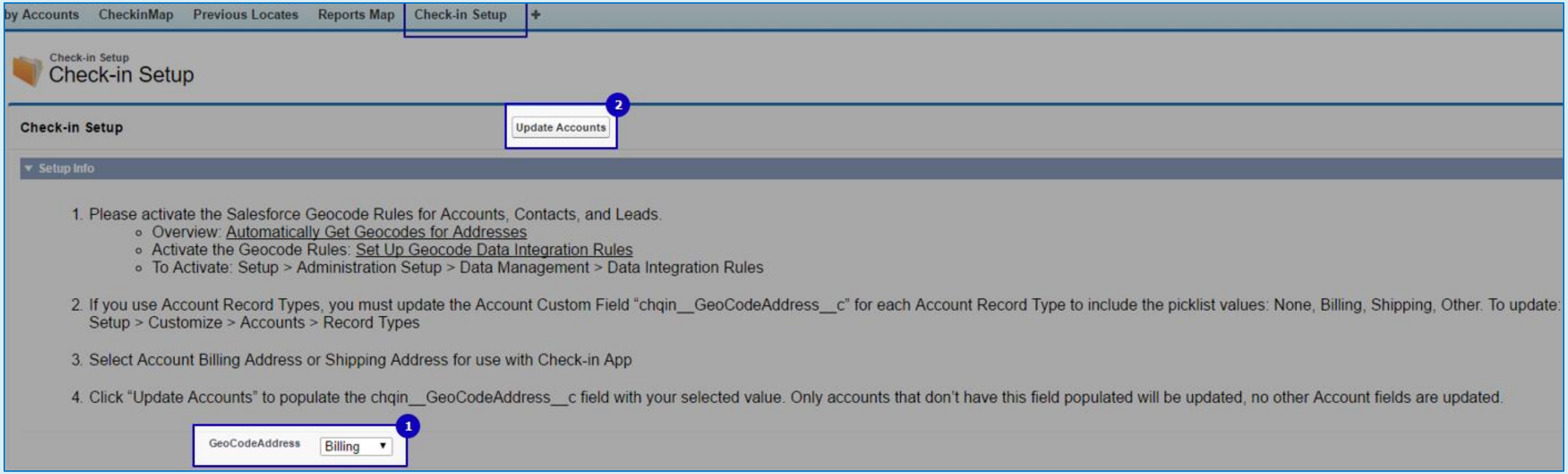


- Verify Account Custom Field "GeoCodeAddress" contains all values in "Selected Values" column for each of your Account Record Type



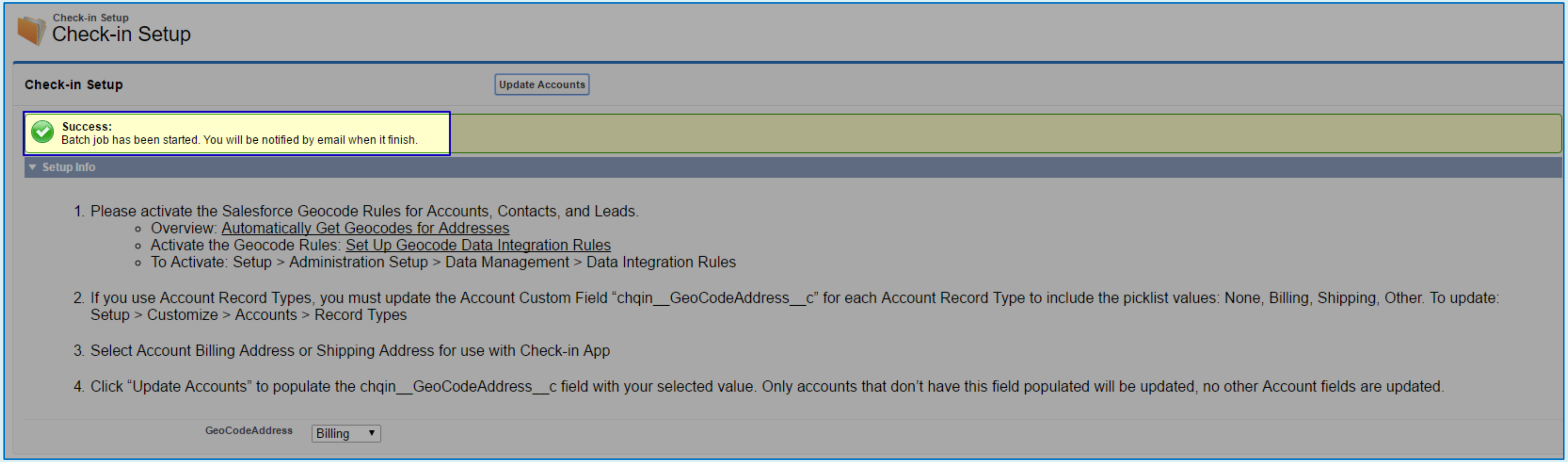
Update Accounts

- 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



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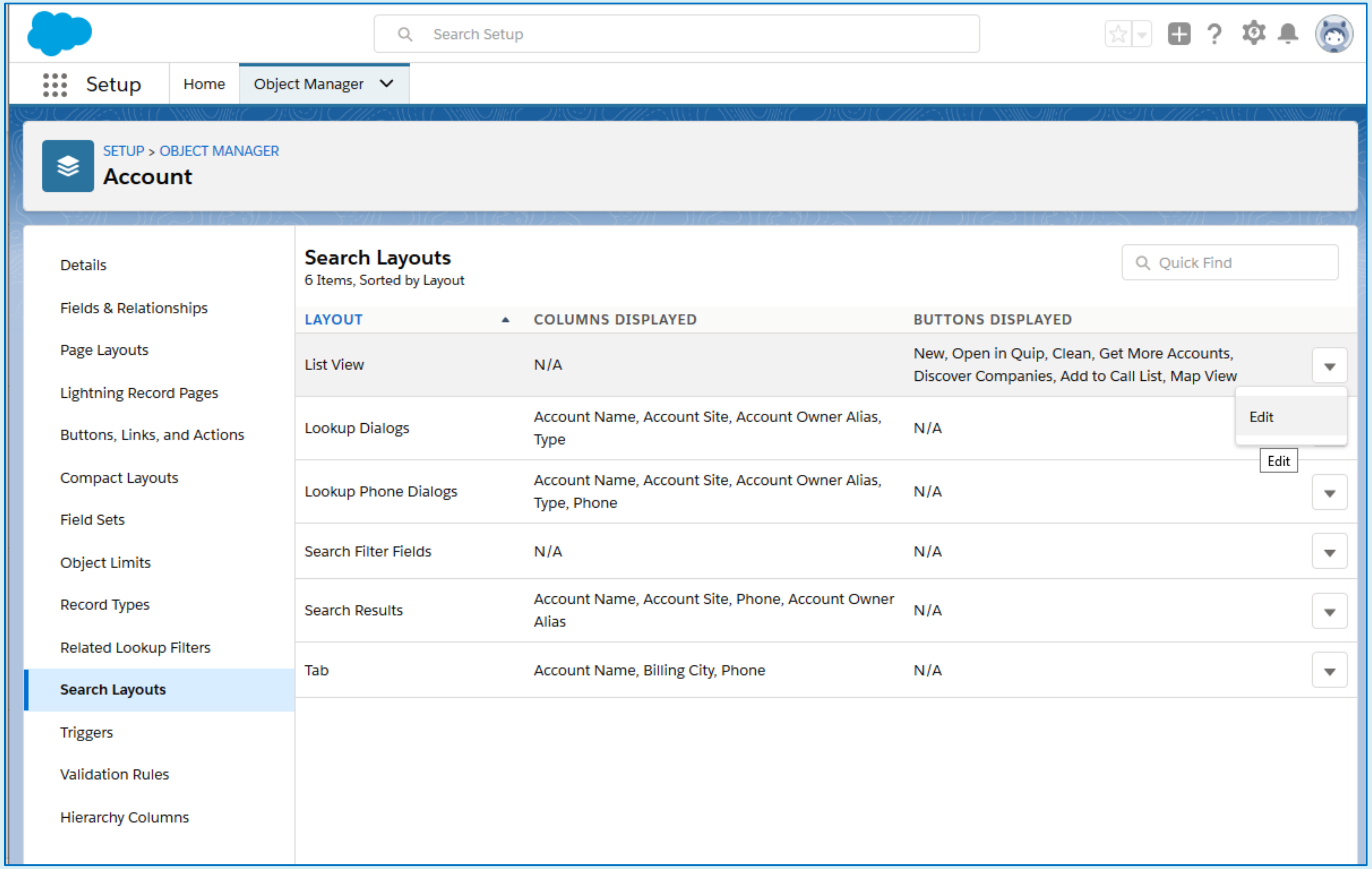
Accounts Map View

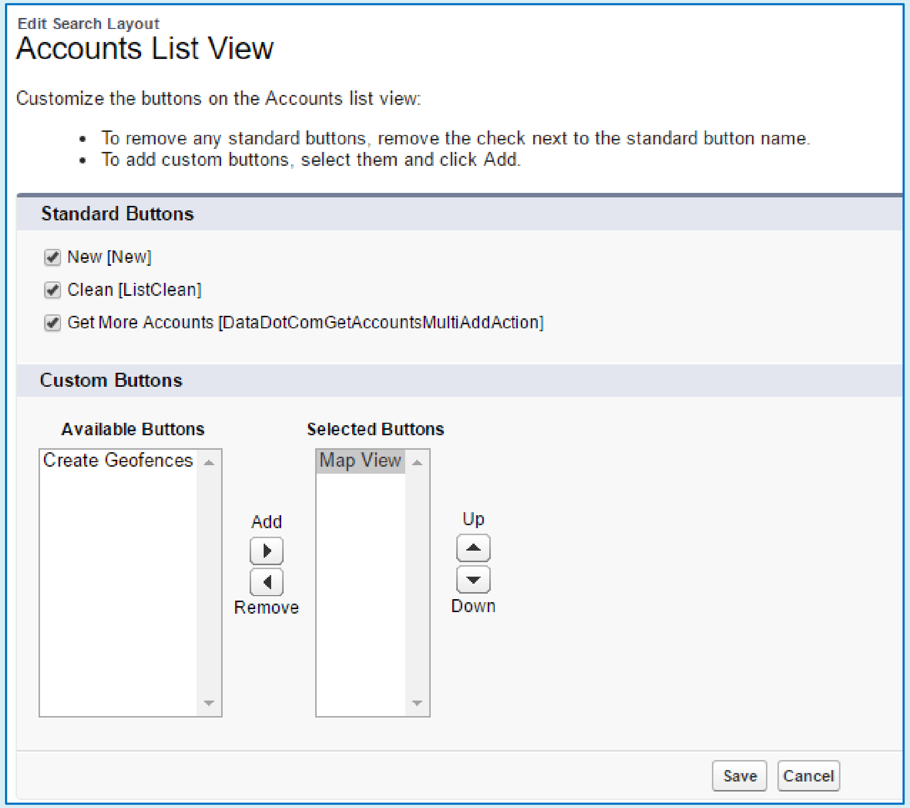
- Configure Account List View
  - Go to Setup
  - Objects & Fields
  - Object Manager
  - Accounts
  - Search Layout
  - List View
  - Edit : add “Map View” button

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



Accounts Map View (Continued)

Select "Map View" , click "Add", then "Save"



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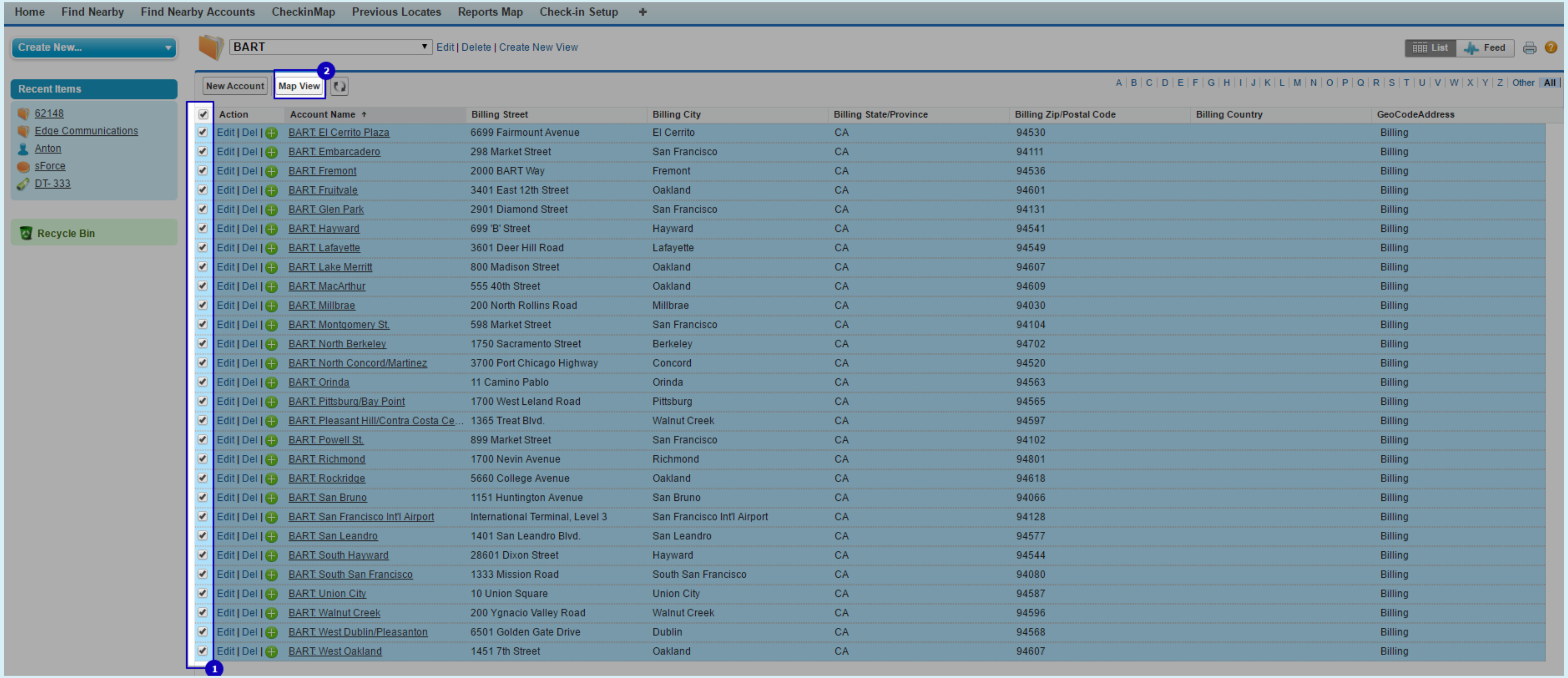
Accounts Map View (Continued)

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

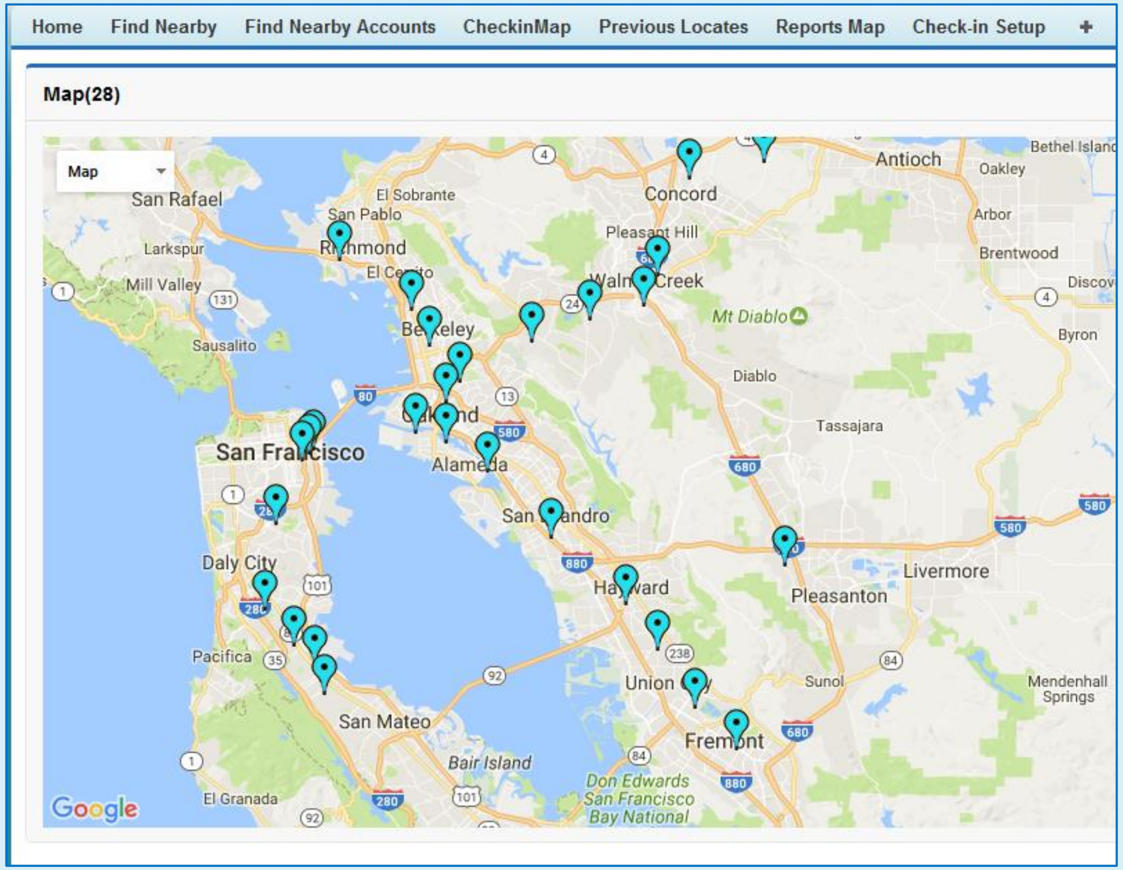


Action	Account Name ↑	Billing Street	Billing City	Billing State/Province	Billing Zip/Postal Code	Billing Country	GeoCodeAddress
Edit | Del |	BART El Cerrito Plaza	6699 Fairmount Avenue	El Cerrito	CA	94530		Billing
Edit | Del |	BART Embarcadero	298 Market Street	San Francisco	CA	94111		Billing
Edit | 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 Int'l Airport	International Terminal, Level 3	San Francisco Int'l 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".



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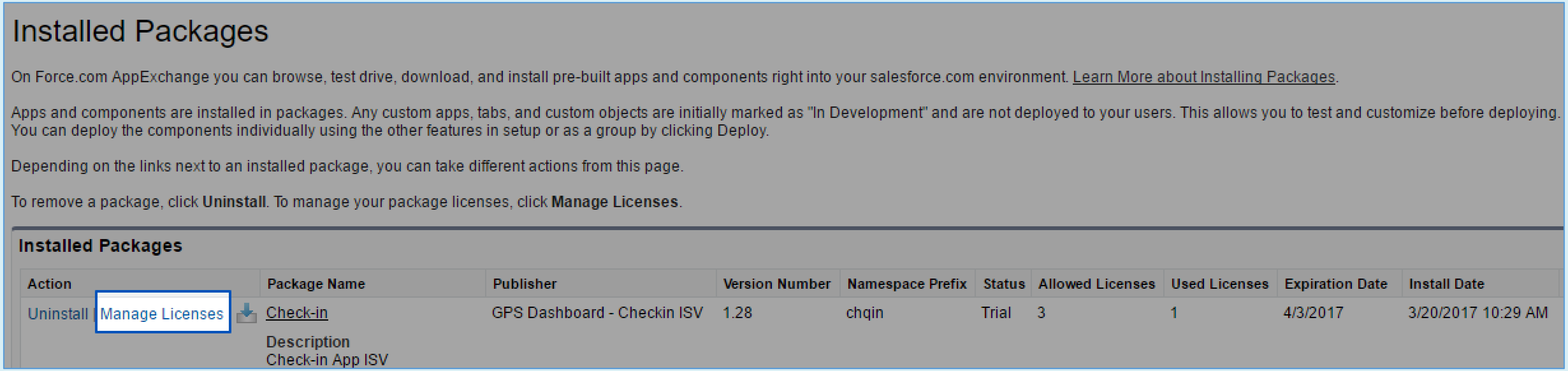
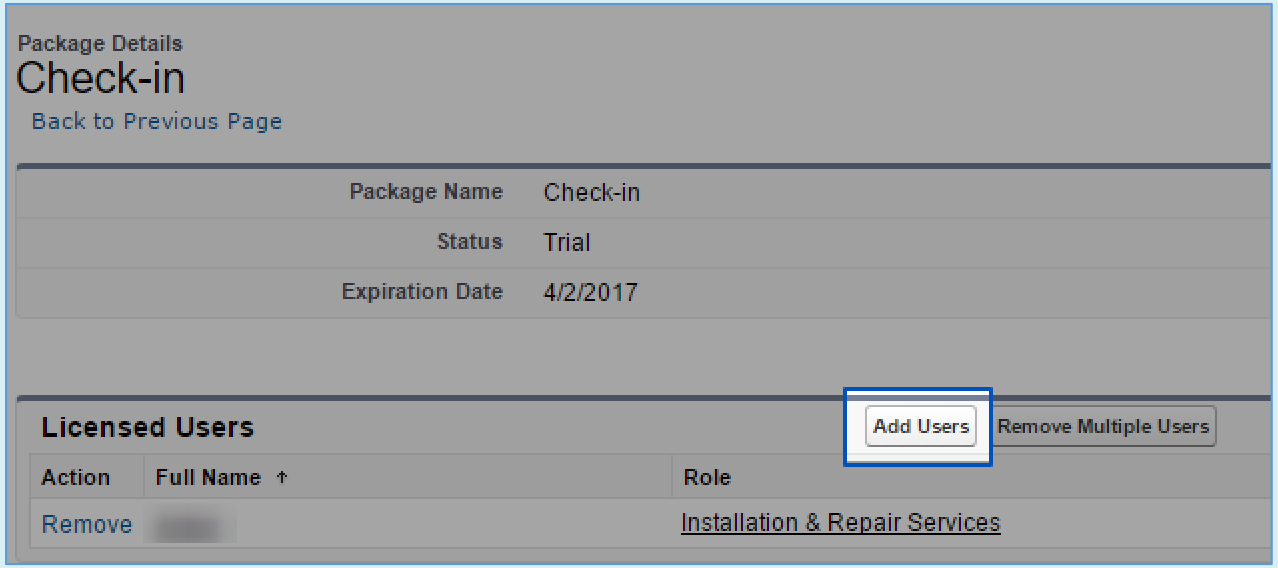
Assign Check-in Licenses to Users

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



Assign Check-in Licenses to Users

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



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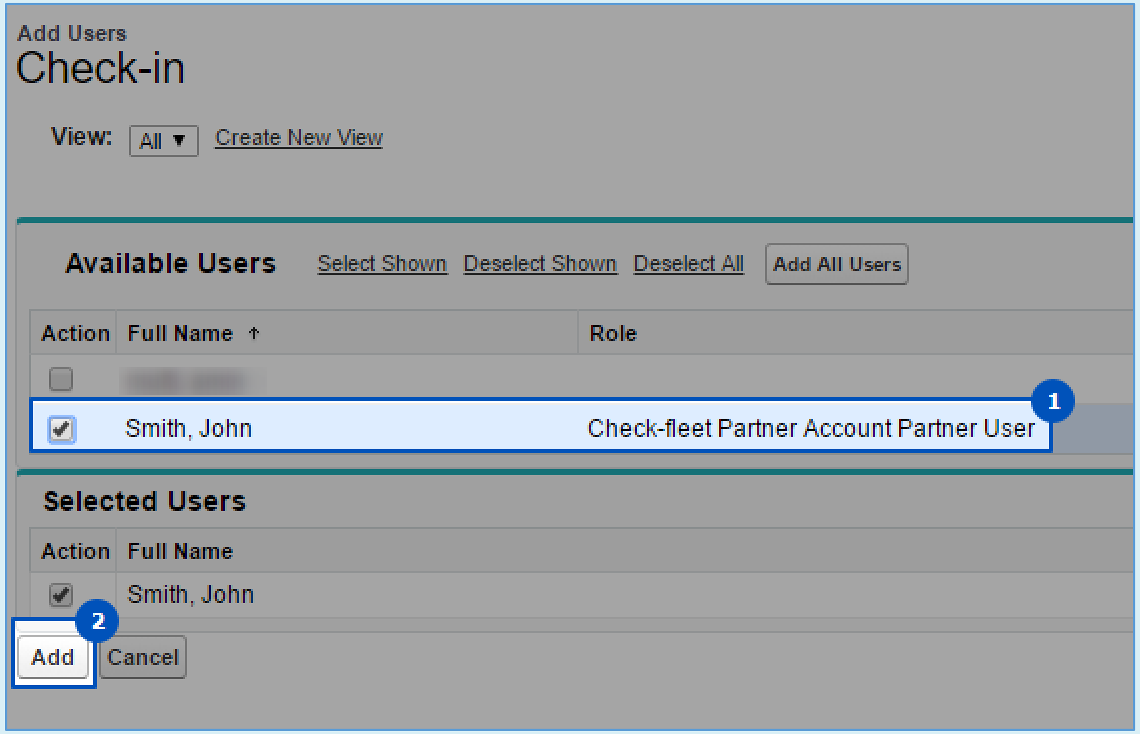
Assign Check-in Licenses to Users

- Select new user and click “Add” button



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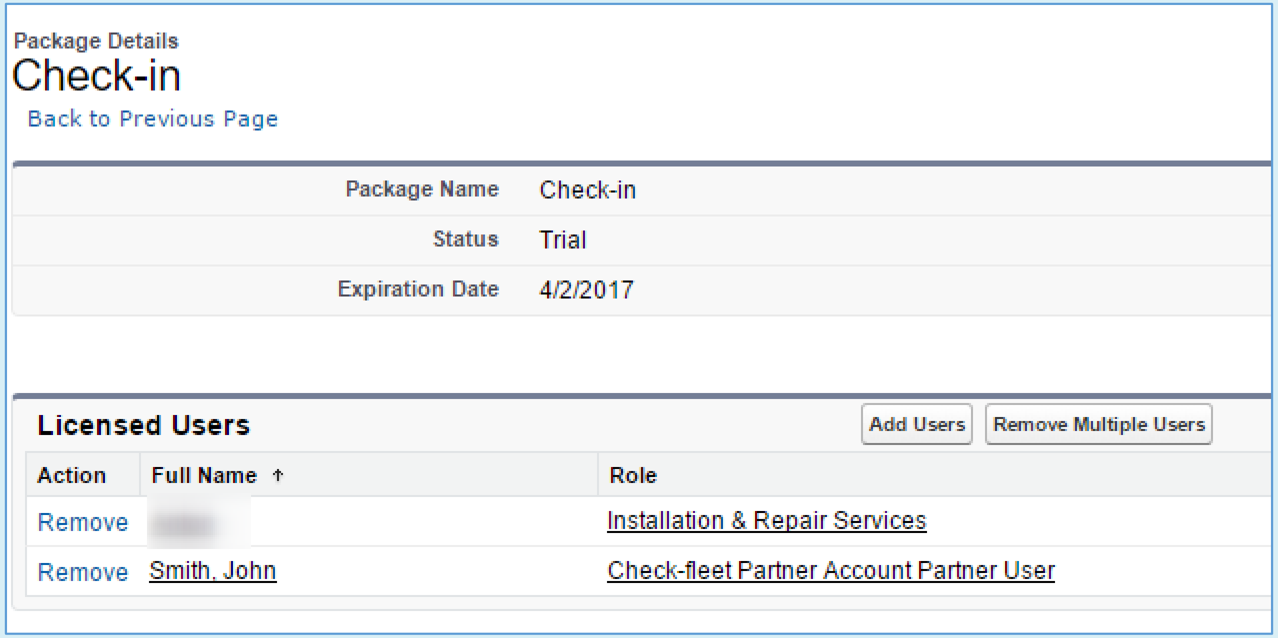
Assign Check-in Licenses to Users

- Access granted



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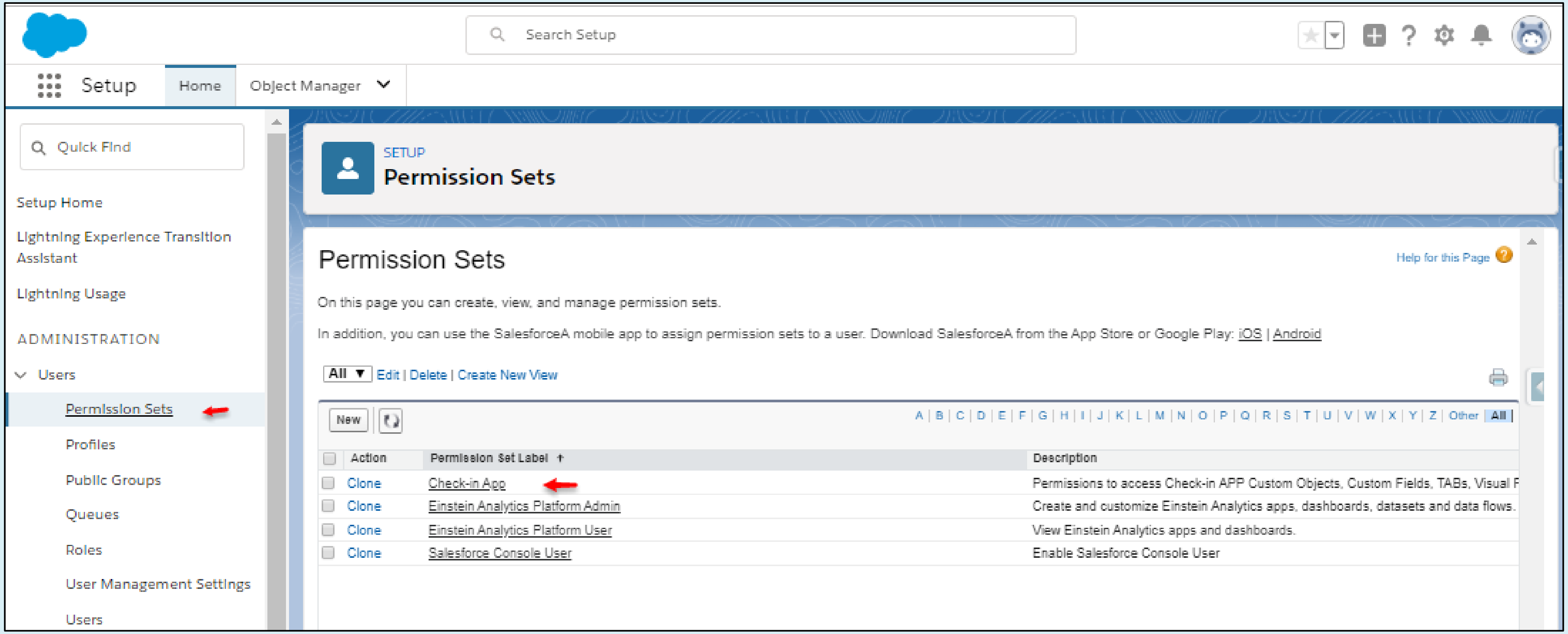
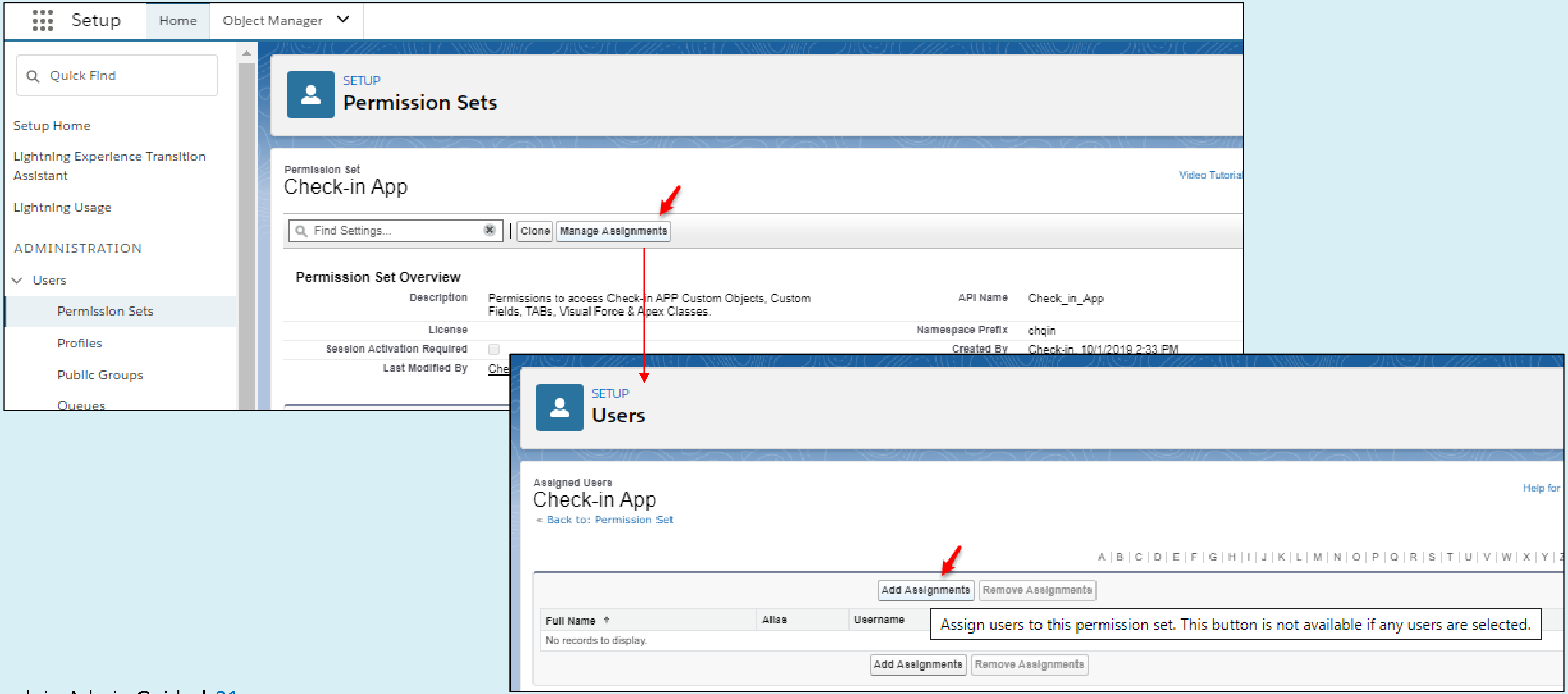
Assign Check-in App Permission Set to Users

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



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



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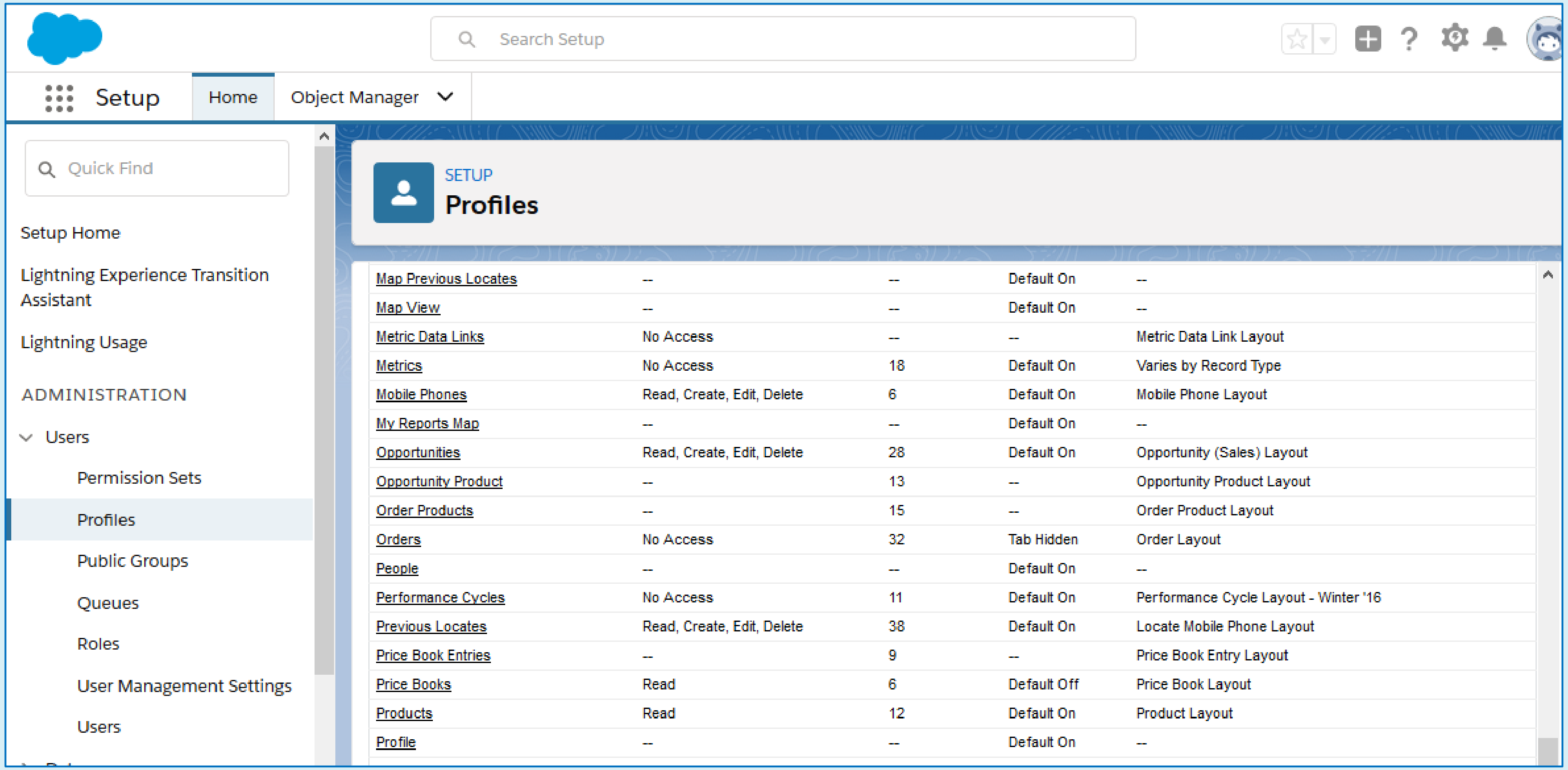
Salesforce "Standard User" Profile not Supported

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



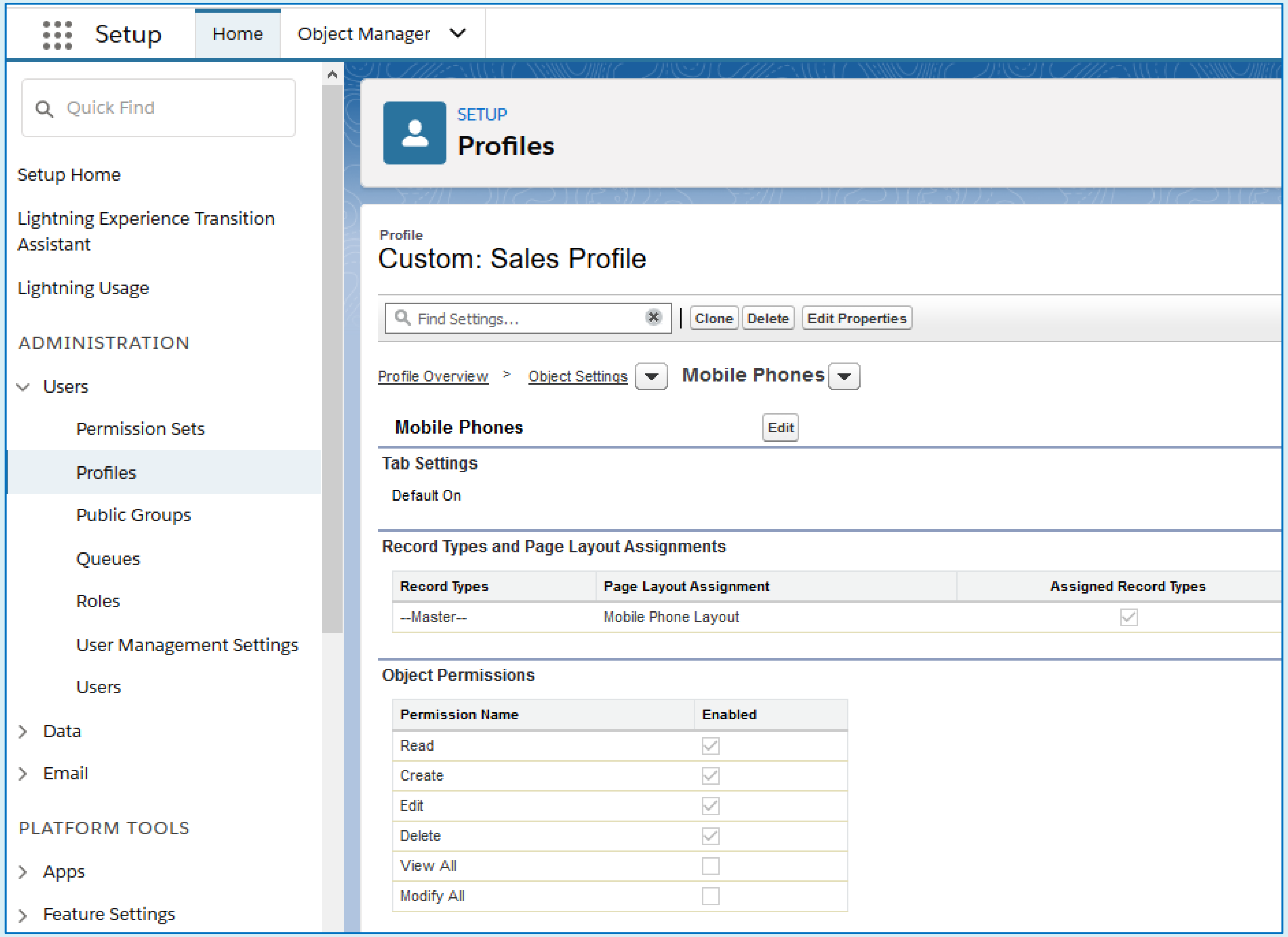
Setup

- Continued next page

Salesforce “Standard User” Profile not Supported (Continued)

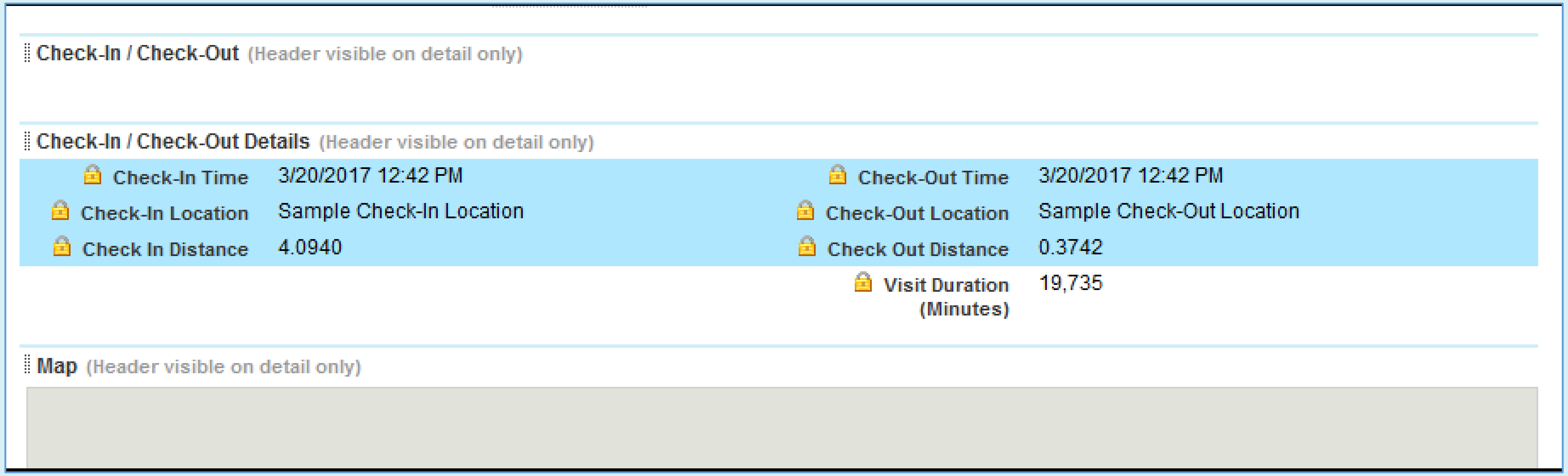
Setup

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



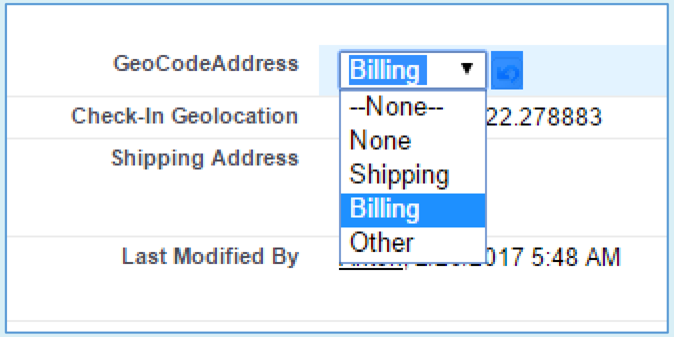
Event Check-in fields: Set to Read Only

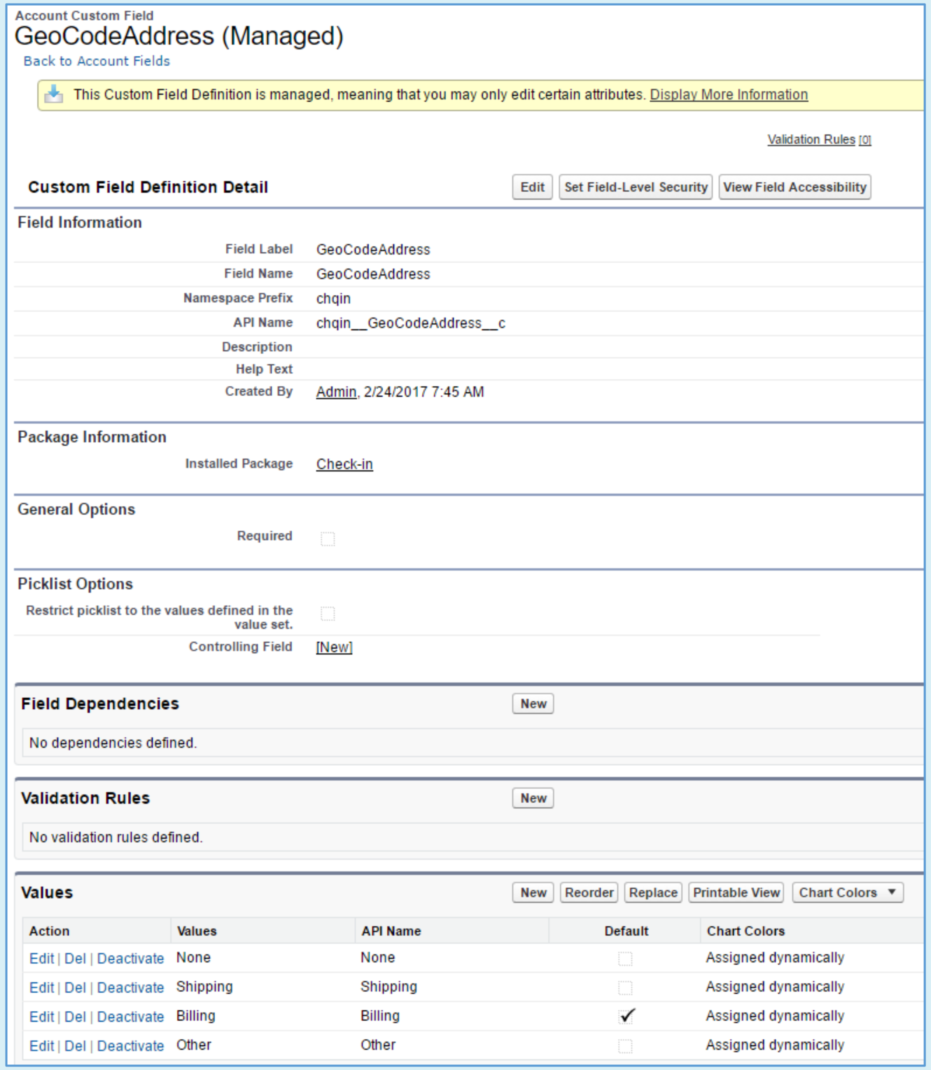
- Lock the Check-in Event custom fields: From Event page layout or field level security.
- Users should not have ability to modify Check-in Event custom fields:
    - Check-in / out Time
    - Check-in / out Location
    - Check-in / out Distance



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"





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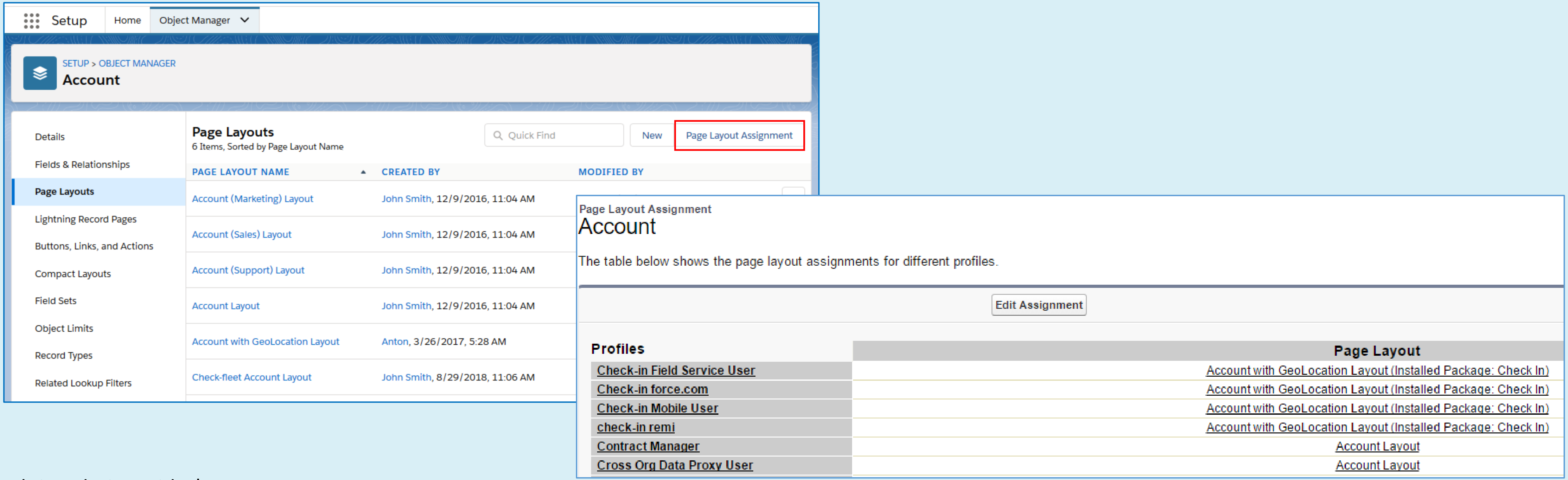
Assign Account & Event Page Layouts to your Check-in Users' Profiles

- 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



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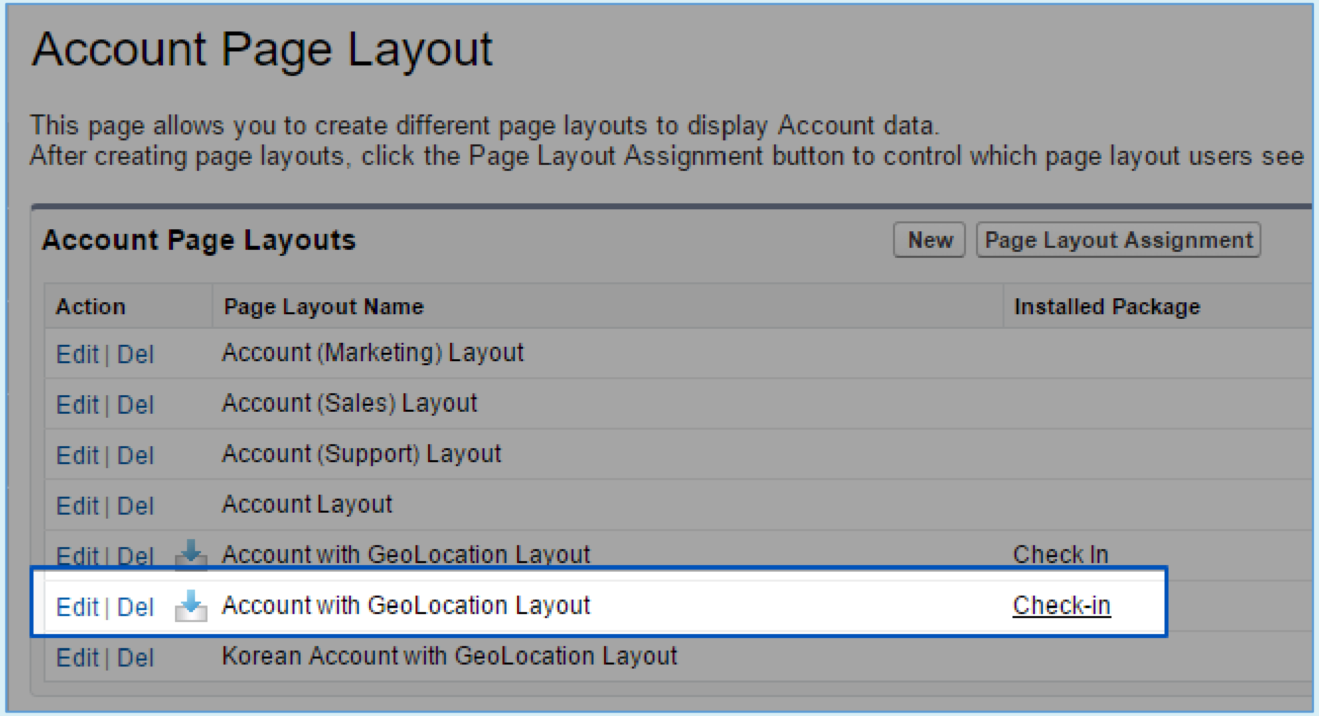
Add check in / check out buttons to Account page layout

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



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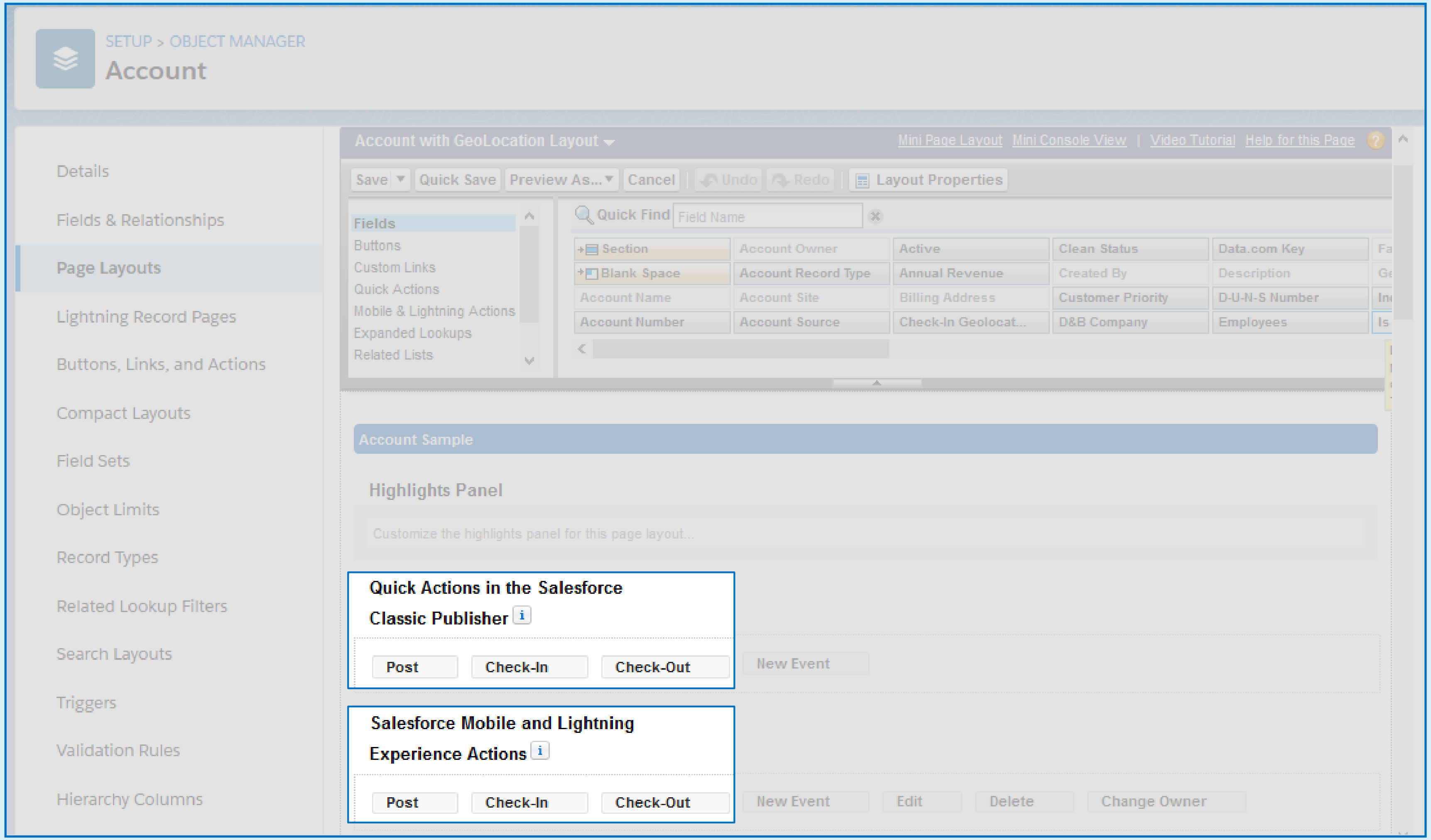
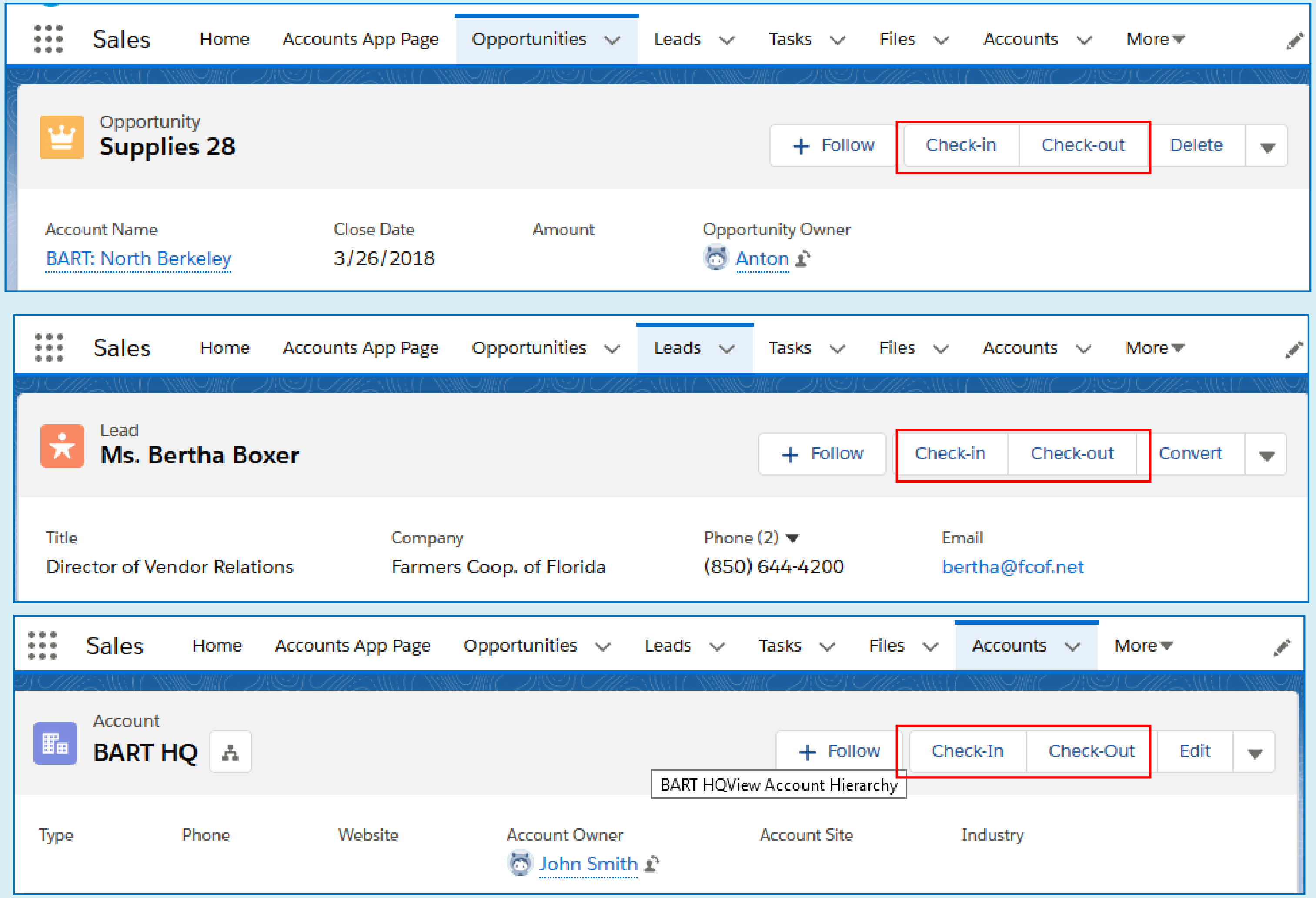
Add check in / check out buttons to Account page layout

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



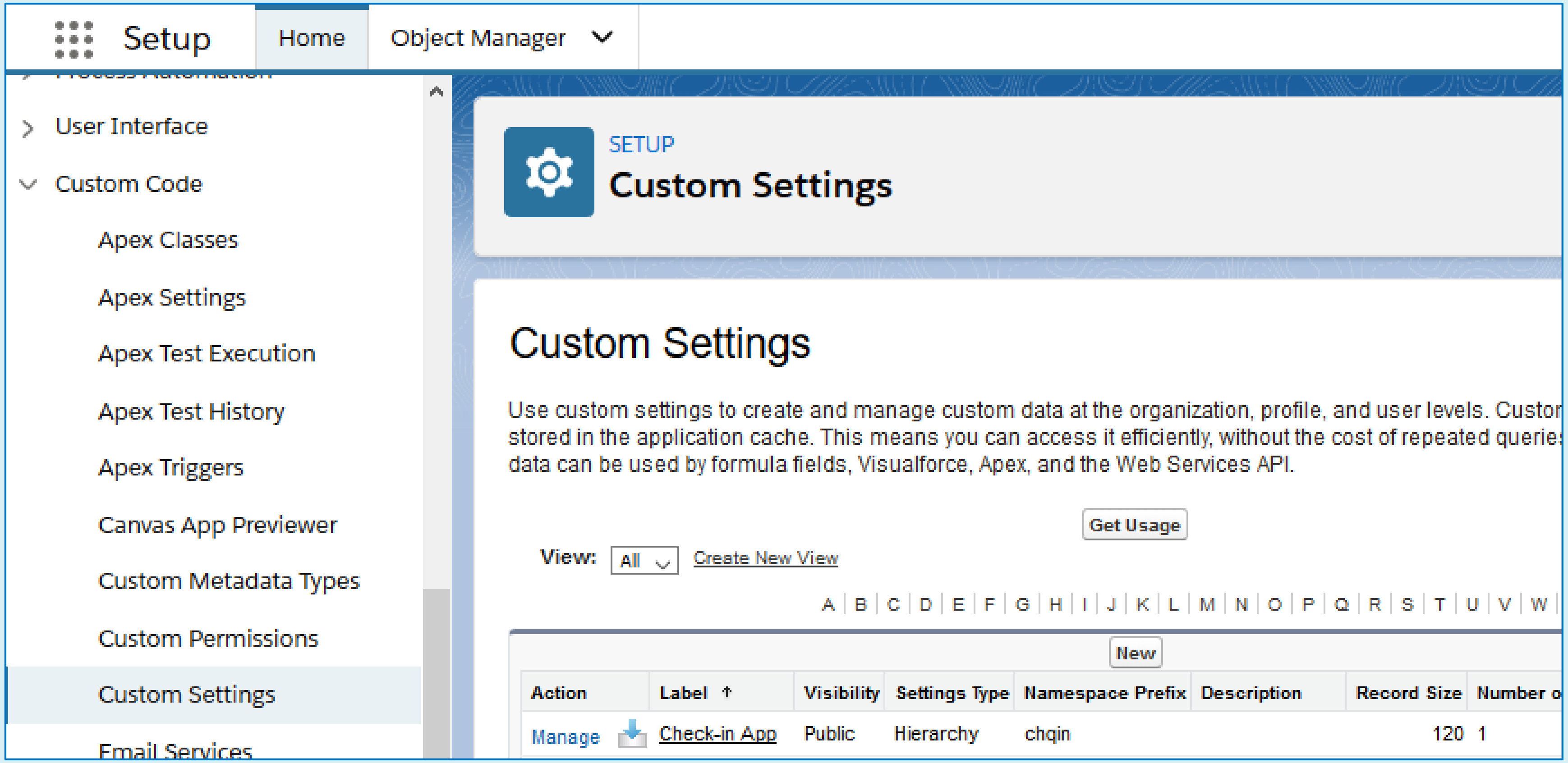
Check-in / Check-out buttons on Account, Opportunity, Contact, Lead

- Does not work with Custom Objects



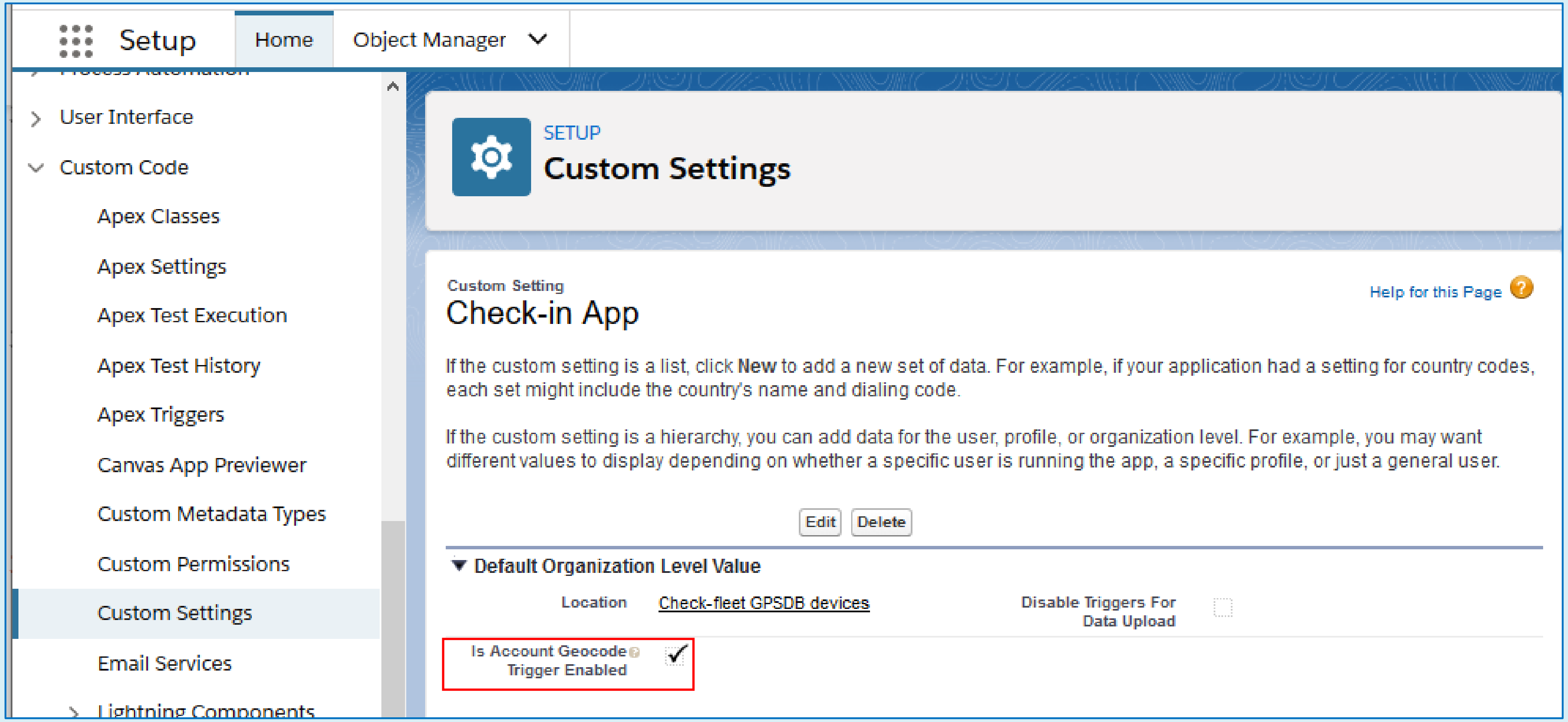
Enable Geocode Trigger

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



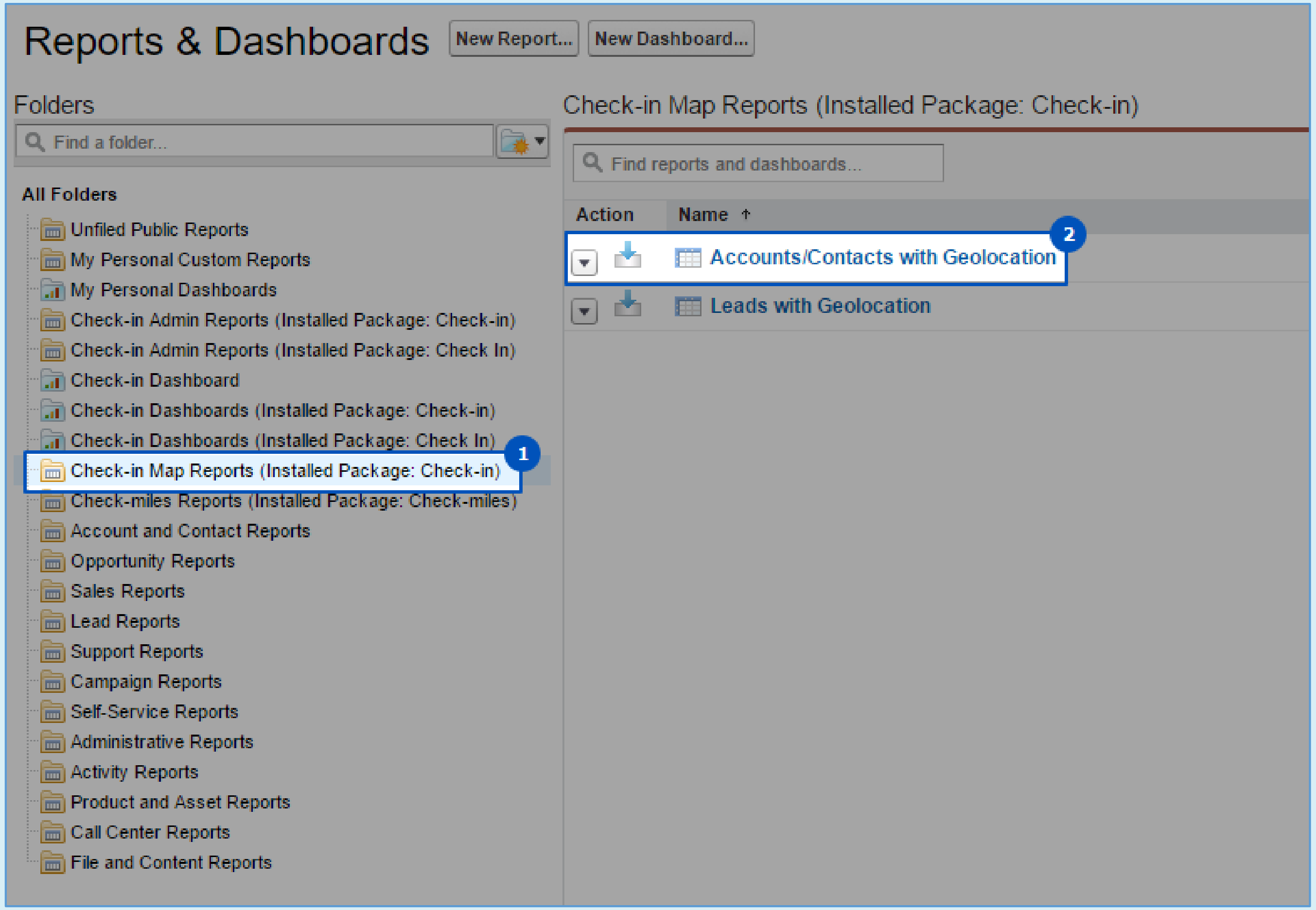
Enable Geocode Trigger (Continued)

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



Run Report “Accounts/Contact with Geolocation”

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



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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	-	-

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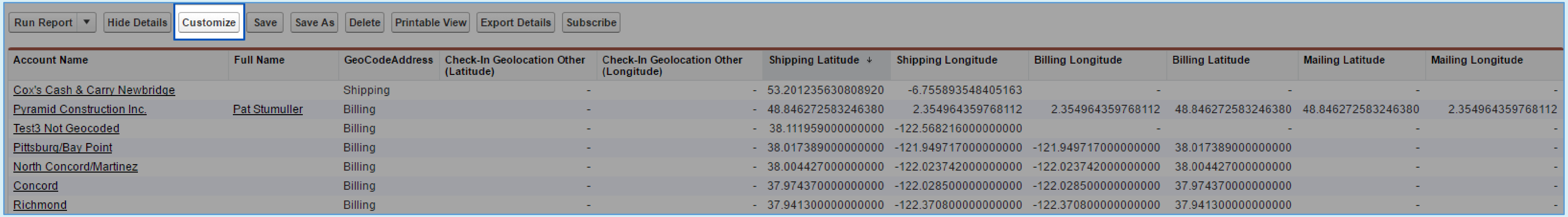
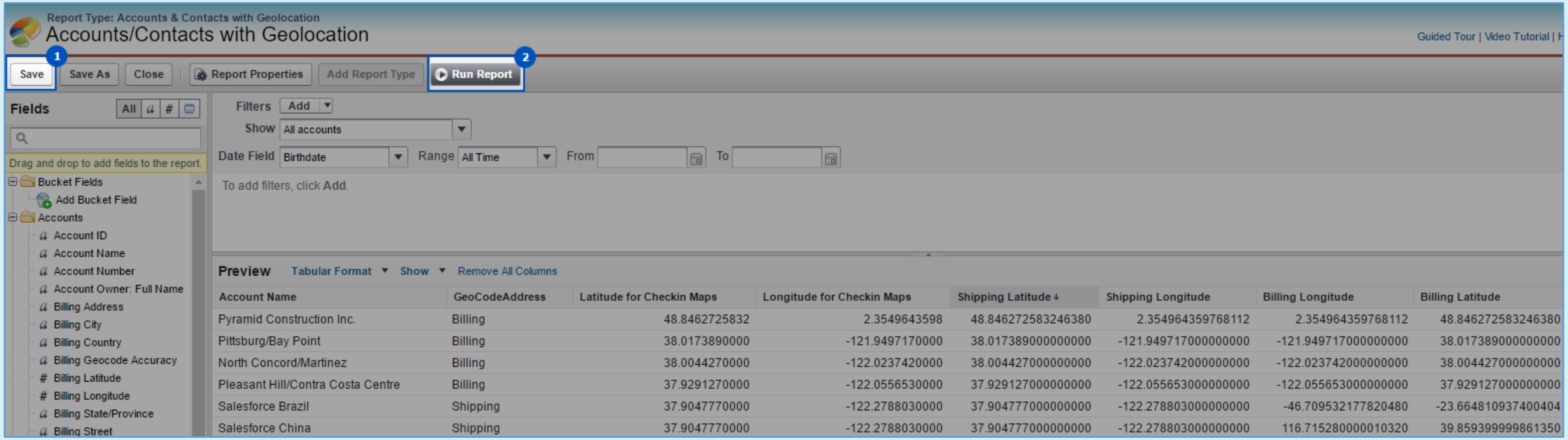
Customize Report “Accounts/Contact with Geolocation”

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



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	-	-



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

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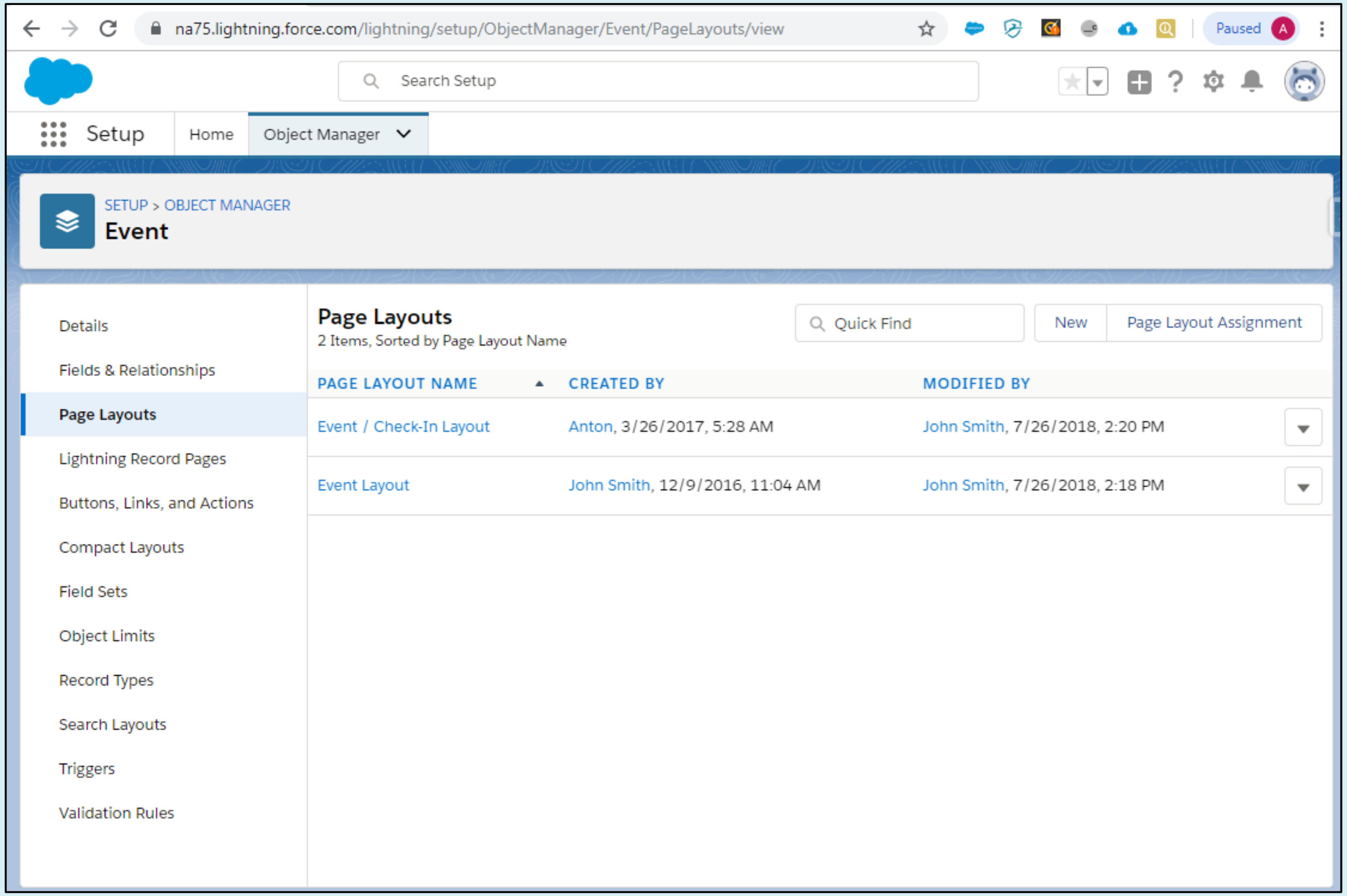
Check-in App Custom Setup (Continued)

- "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

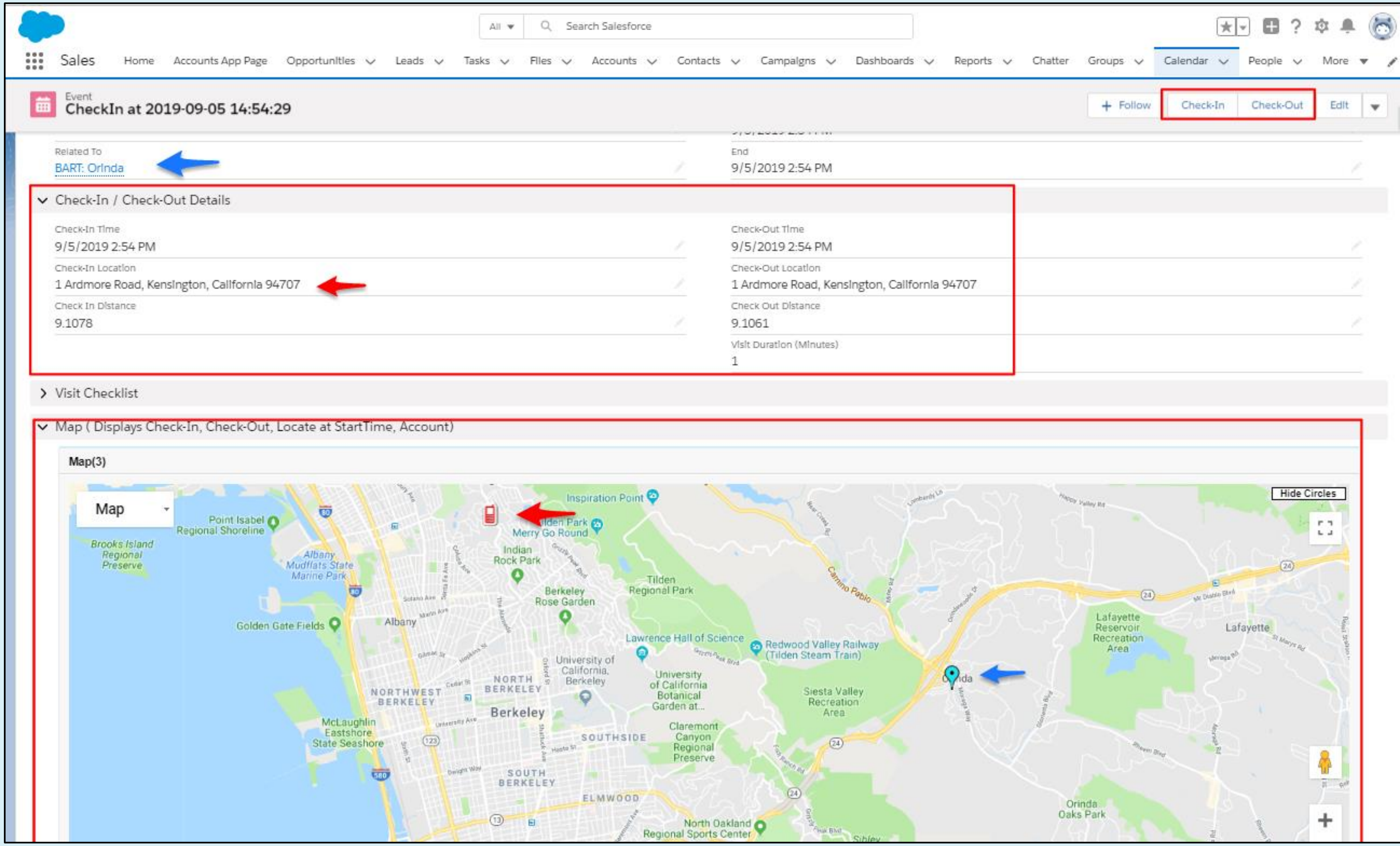


GPSDASHBOARD

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)



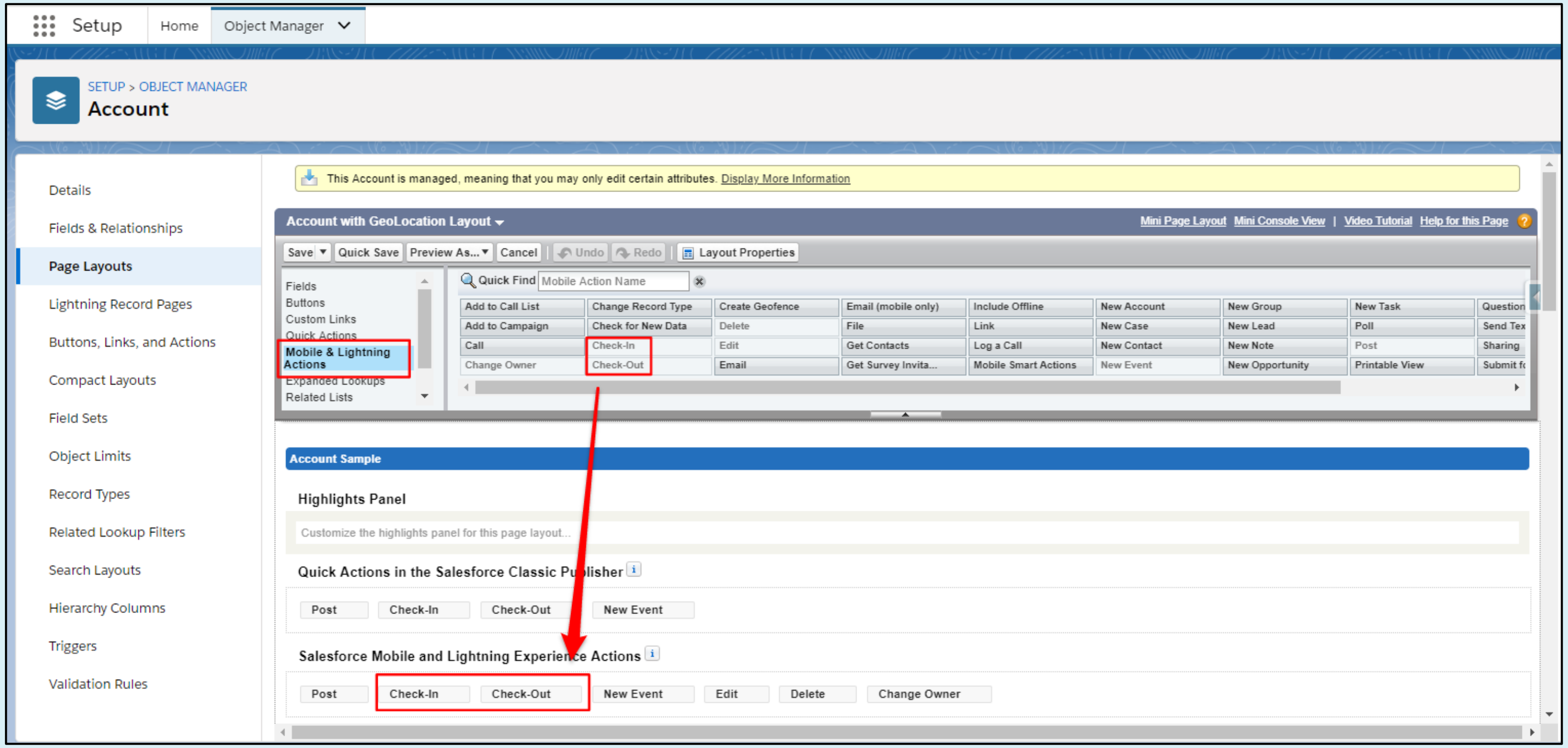
Check-in App Custom Setup (Continued)

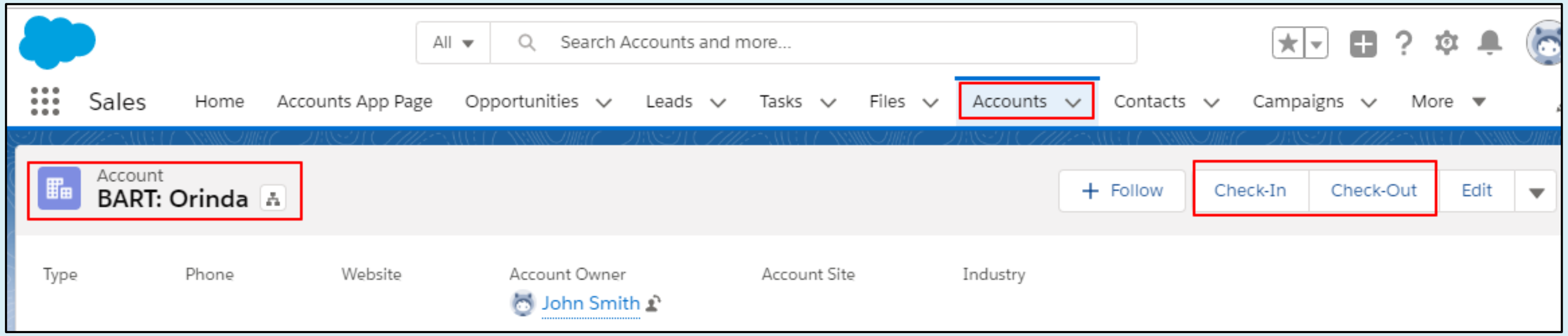
Account:

- 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:

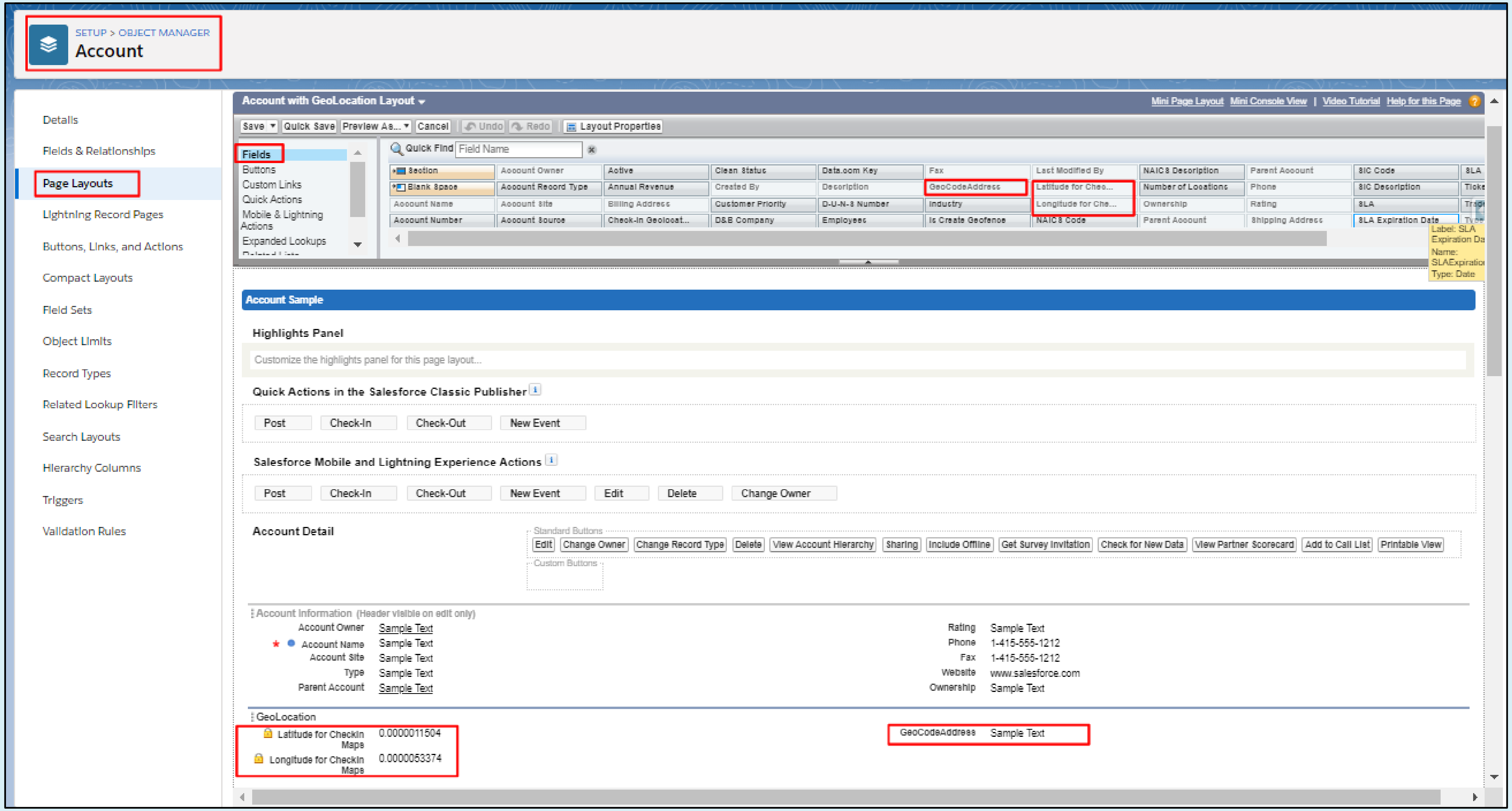
- The page layout for a Record Type that will be used with Check-in App must be modified as described above.





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.



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)

<u>"Event Custom Fields":</u>

- 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