



# **FieldLogix**

## **Field Resource Management**

### ServiceTrade Integration Guide

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# Servicetrade Integration Guide

## By FieldLogix

Version 1.2.1 – April 2025

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## About FieldLogix

FieldLogix is a GPS fleet & workforce management application. It gives organizations the ability to monitor vehicle locations, statuses, history, health, and driver behavior. The company has been working with fleets of all sizes throughout North America since 2002.

With FieldLogix, organizations can:

### **Monitor technician locations in real-time**

View current technician locations on Google maps along with statuses, live traffic conditions, etc.

### **View technician history**

Review paths traveled to jobs, jobsite arrival and departure times, workday start and end times, etc.

### **Monitor driver safety**

Receive alerts when drivers violate posted speed limits, monitor aggressive driving, and get notifications when they leave defined service areas.

### **Monitor vehicle health**

Monitor engine diagnostics such as check engine light status, MPG's, fluid levels and temperature, fuel levels, etc.

### **Monitor driver behavior**

Know which drivers are wasting fuel due to excessive idling, speeding, and other poor driving habits.

### **Dispatch routes to drivers**

Build and optimize routes and dispatch them to your drivers' mobile devices.

## ServiceTrade Integration Features

With the ServiceTrade integration, you have the ability to view your ServiceTrade appointments within the FieldLogix maps along with your technicians' locations.

The integration creates **Landmarks in FieldLogix** with your **ServiceTrade Service Appointments**. The newly created appointments in ServiceTrade will display on the FieldLogix maps within seconds of creation. Editing appointments will also edit the landmark within FieldLogix. When a job is completed in ServiceTrade, it will disappear from FieldLogix.

*With the integration, you can...*

### **View all jobs on the FieldLogix map**

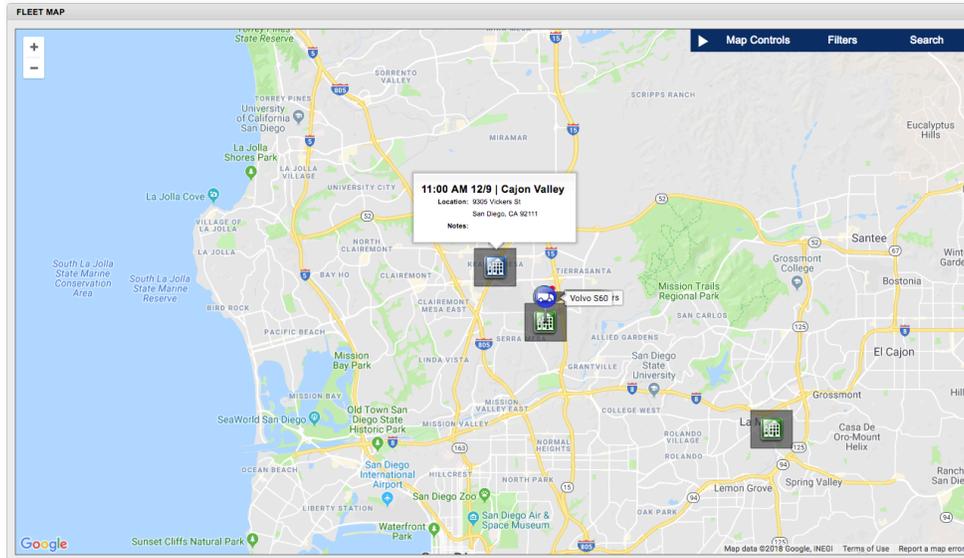
View all of your upcoming jobs on the FieldLogix map along with your technicians' locations.

### **Determine technician proximity to jobs**

You can dispatch new jobs to your closest available technicians.

### **View technician status**

Quickly determine which technicians are at which jobs by viewing the map.



## About This Guide

This guide has been setup to provide you with an overview of the FieldLogix Bridge and how to configure the Servicetrade integration.

If you require assistance in setting up the integration, please contact us at [support@fieldlogix.com](mailto:support@fieldlogix.com).

## Prerequisites

### Account Prerequisites

- You have an active FieldLogix Field Resource Management account.
- You have an active Servicetrade account.
- You are using the “dispatch” or “scheduling” functionality within Servicetrade.
- Your Servicetrade account has the **Vehicle Tracking** Asset type setup.

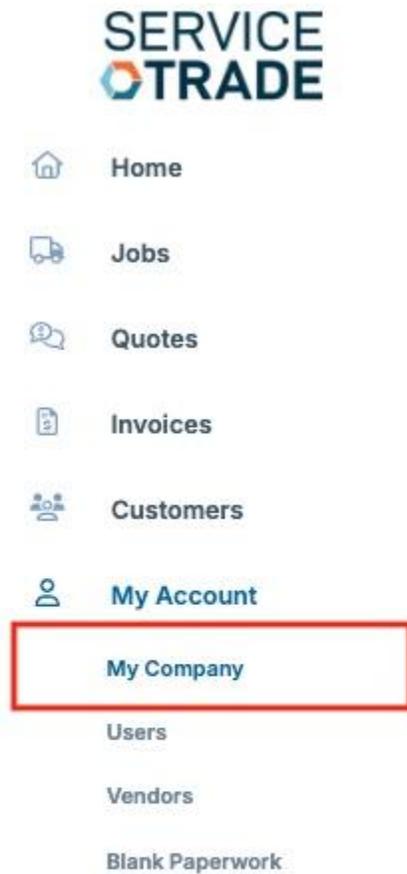
### Servicetrade User Prerequisites

- It is recommended that you set up a dedicated Servicetrade user for the FieldLogix integration.
- The new Servicetrade user should have access to Vehicle Tracking in the Asset Types settings within Servicetrade.
- The new Servicetrade user should have **Account Admin** access rights in Servicetrade.
- **Important:** You must log into Servicetrade with the newly created Servicetrade user account one time in order to accept the End User License Agreement (EULA).

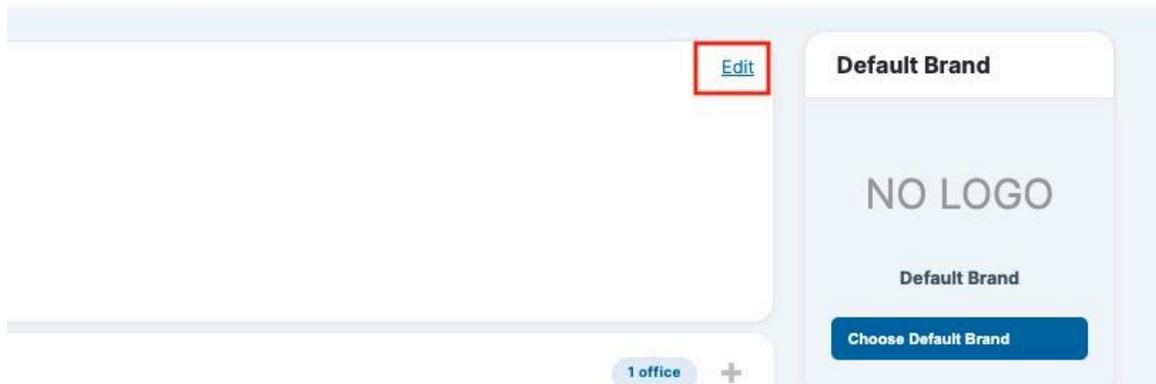
# Servicetrade Account Setup

*New homepage version*

Go to **My Account / My Company** in the left navigation menu



Click the **Edit** link in the top right corner of the section that contains your company's name.

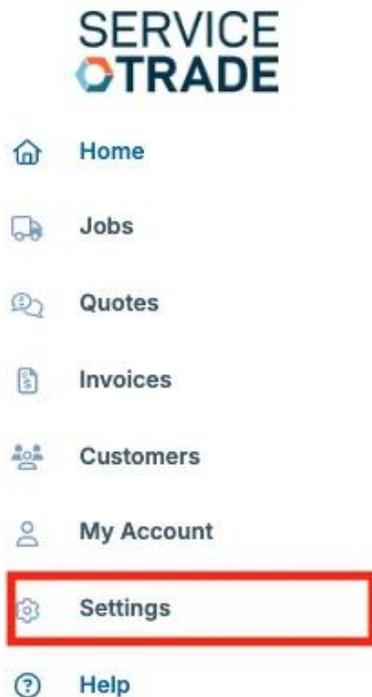


Scroll to the bottom of the page and click the checkbox for **(VHTRK) Vehicle Tracking** and click **save**.

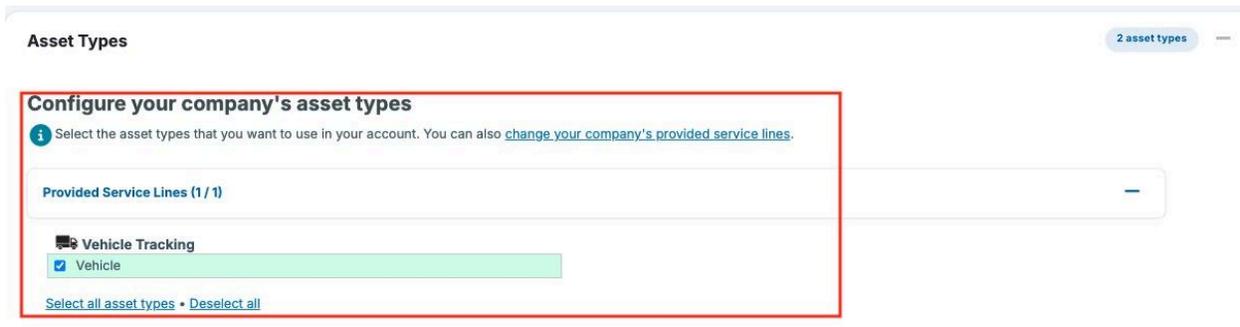


The screenshot shows a list of service options. At the top is '(SPROT) Surface Protection' with an unchecked checkbox. Below it is the 'Vehicle Tracking' section, which is highlighted with a red border. Inside this section, '(VHTRK) Vehicle Tracking' is checked and highlighted in green. Below that is the 'Waste Removal' section, which includes three unchecked options: '(INDWSTREM) Industrial Waste Removal', '(CNCLN) Trash Can Cleaning', and '(WASTE) Waste Removal'. At the bottom of the list are two links: 'Select all service lines' and 'Deselect all'. Below the links are two buttons: a blue 'Save' button and a 'Cancel' link.

Go to the **Settings** page from the left navigation menu in Servicetrade.



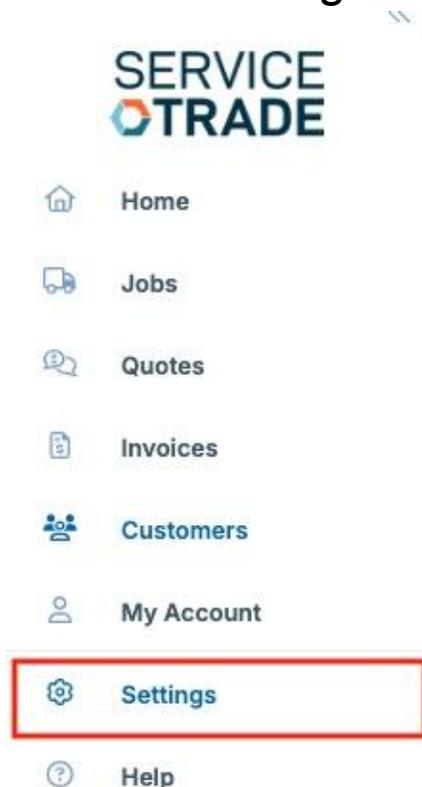
Expand the **Asset Types** section and select **Vehicle** under the **Vehicle Tracking** item (which may be under the *Other Service Lines* section) and click **save**.



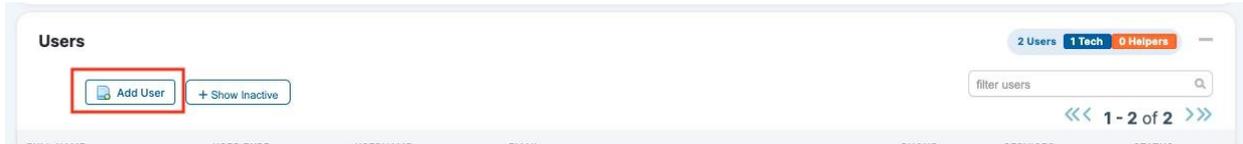
## Servicetrade User Setup

Create your new dedicated Servicetrade integration user

Go back to **Settings** in the left menu.



Click the **Users** section to expand it and click **Add User**.



Enter a username, password and other details for the integration user. Scroll to the bottom of the screen and select the **User is a Technician** check box and the **Vehicle Tracking (VHTRK)** checkbox and click **save**.



## ServiceTrade User Login

Log into the ServiceTrade portal with the new user account one time and accept the **End User License Agreement (EULA)**.

### No Assignment

You and the persons you represent may not assign this Agreement or the rights and obligations under this Agreement without the express prior written consent of ServiceTrade, which may be withheld in ServiceTrade's discretion. ServiceTrade may assign this Agreement and its rights and obligations under this Agreement without your consent or the consent of any persons you represent.

### How to Contact Us

Questions or comments about these Terms or the Site may be directed to ServiceTrade at 919-246-9900.

### ServiceTrade

Attention: Legal Department  
4601 Creekstone Drive  
Durham, North Carolina 27703

Yes, I Accept

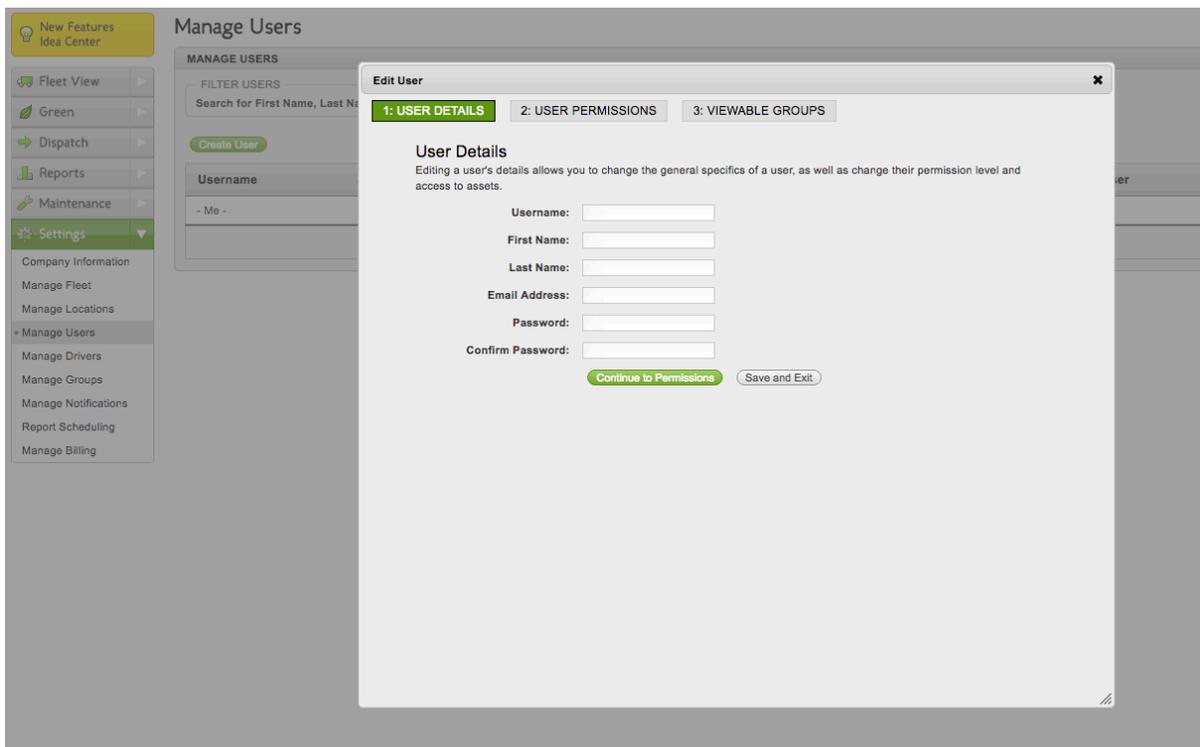
No, I Do Not Accept

# FieldLogix User Setup

## FieldLogix Integration User Setup

It is recommended that you set up a specific user account in FieldLogix for the Bridge (i.e. “mycompanyapi”). Be sure to give the account full account access. There is no fee to add this user.

Log into <https://secure.fieldlogixgps.com> and setup a new user, go to **Settings > Manage Users** in FieldLogix.



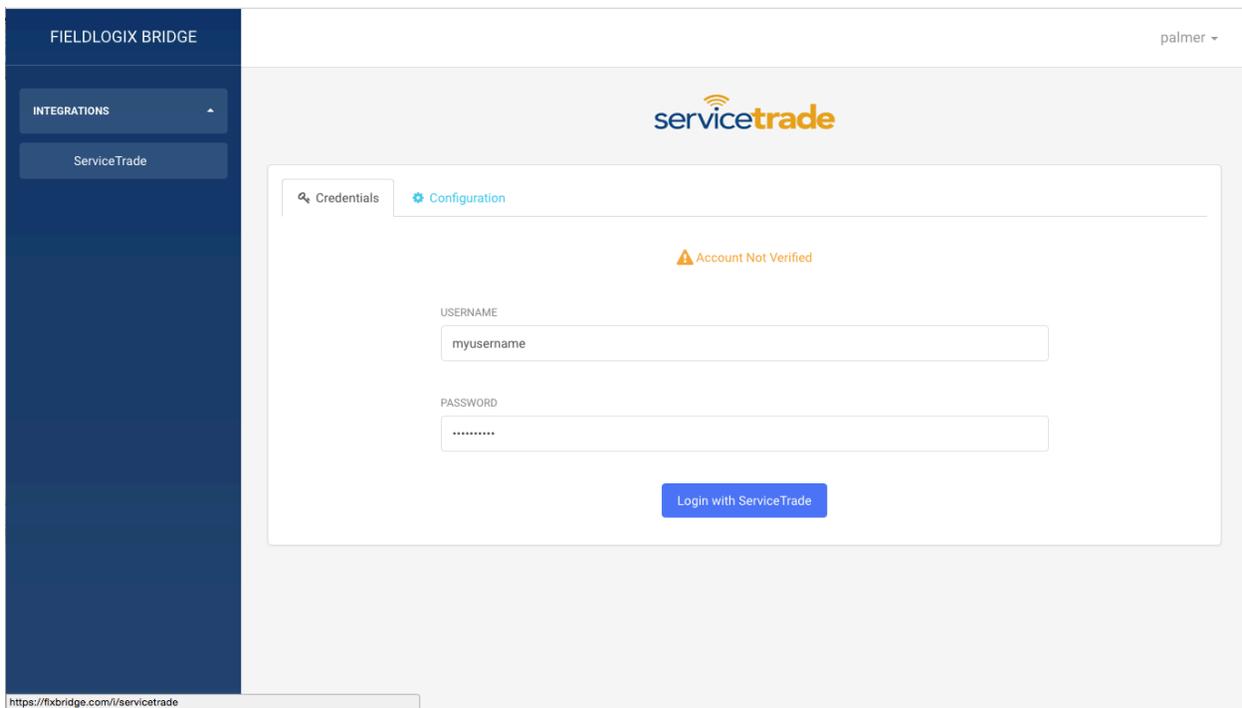
## FieldLogix Bridge Setup

Go to <https://flxbridge.com>

Use the newly created FieldLogix username and password to log into the Bridge.

Click on the Integrations option in the left column and select Servicetrade from the drop down.

Enter your newly created Servicetrade account username and password to login.



The screenshot displays the FieldLogix Bridge web application. On the left, a dark blue sidebar contains the text 'FIELDLOGIX BRIDGE' at the top and 'palmer' at the bottom right. Below this, a menu labeled 'INTEGRATIONS' is expanded to show 'ServiceTrade'. The main content area features the 'servicetrade' logo at the top center. Below the logo, there are two tabs: 'Credentials' (selected) and 'Configuration'. A warning message 'Account Not Verified' is displayed in orange. Below this, there are two input fields: 'USERNAME' with the value 'myusername' and 'PASSWORD' with masked characters. A blue button labeled 'Login with ServiceTrade' is positioned below the password field. At the bottom left of the browser window, the URL 'https://flxbridge.com/servicetrade' is visible.

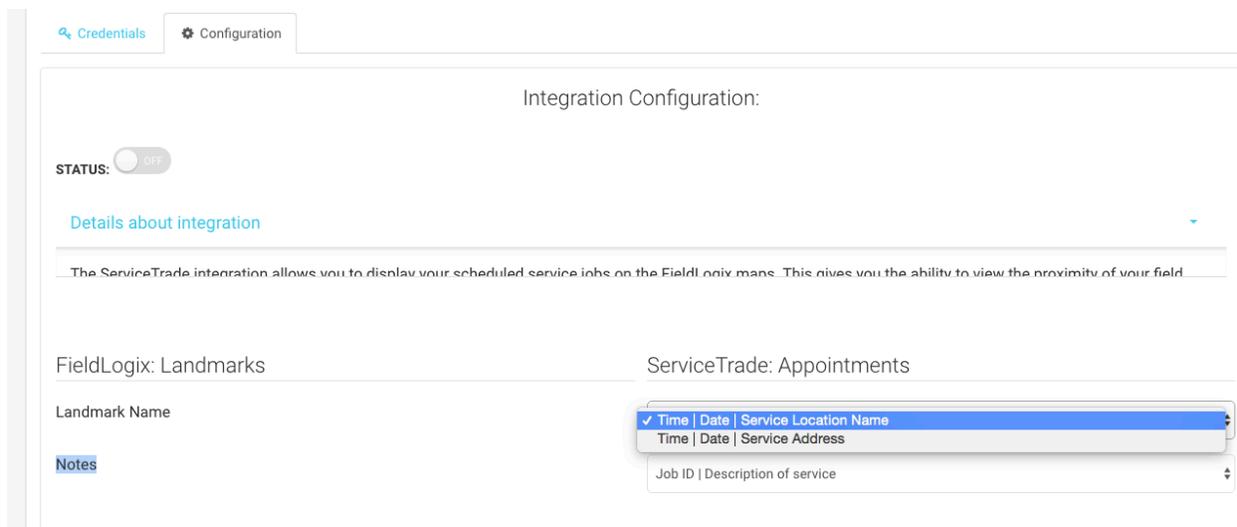
## FieldLogix Bridge Configuration

After logging into your Servicetrade account, you have the option to modify the pre-configured integration options by selecting the Configuration tab.

The current pre-configured integration fields are mapped to FieldLogix as follows:

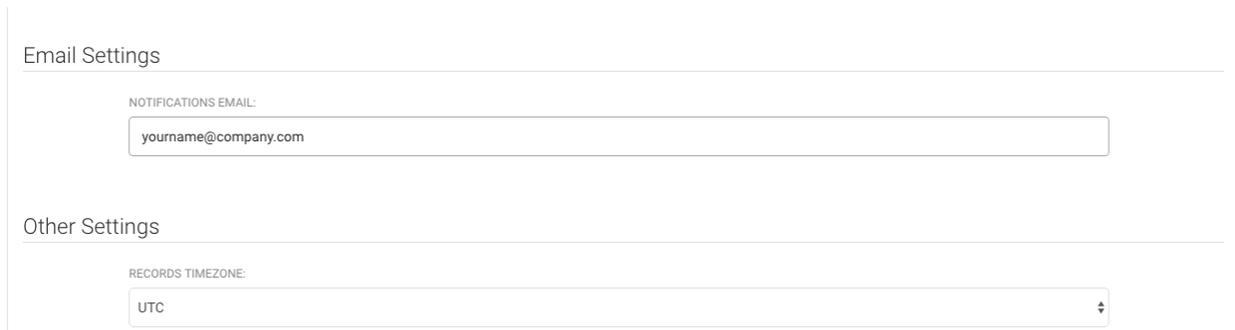
ServiceTrade Appointment	FieldLogix Landmark
Time Date   Service Location Name	Name
Address	Address
City	City
State	State
Zip	Zip
Job ID   Description of Service	Description

You have the option to change the mapping for the Landmark Name to “Time | Date | Service Address”.



Be sure to enter an e-mail address to receive alerts if there are any issues with the integration (i.e. the user's Servicetrade credentials stop working).

Also, select your preferred time zone.



The screenshot shows a settings form with two sections. The first section, 'Email Settings', contains a label 'NOTIFICATIONS EMAIL:' and a text input field with the value 'yourname@company.com'. The second section, 'Other Settings', contains a label 'RECORDS TIMEZONE:' and a dropdown menu with 'UTC' selected.

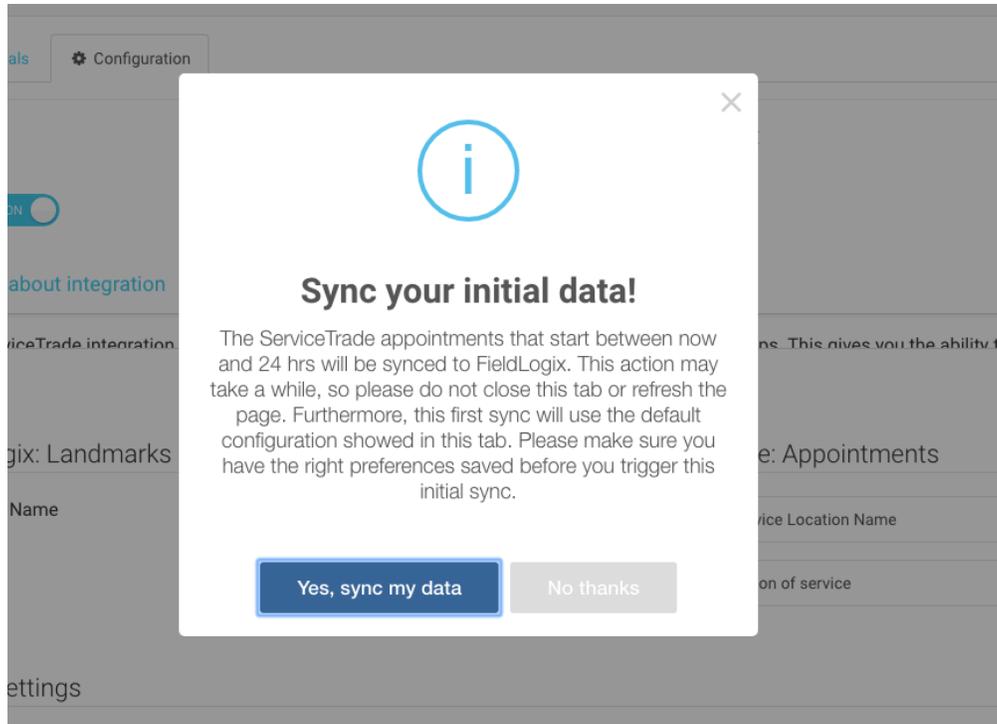
After setting your preferences, click “save changes”.



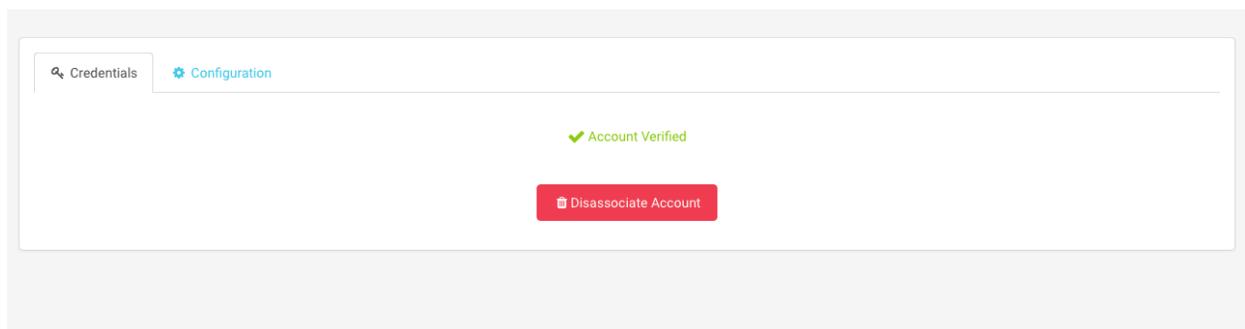
Change the status button to “on” in order to sync your data.



A message will then display asking you if you would like to sync your initial data. When you click “yes, sync my data”, the system will insert all of the service appointments between the current time and 24 hours from now into FieldLogix.



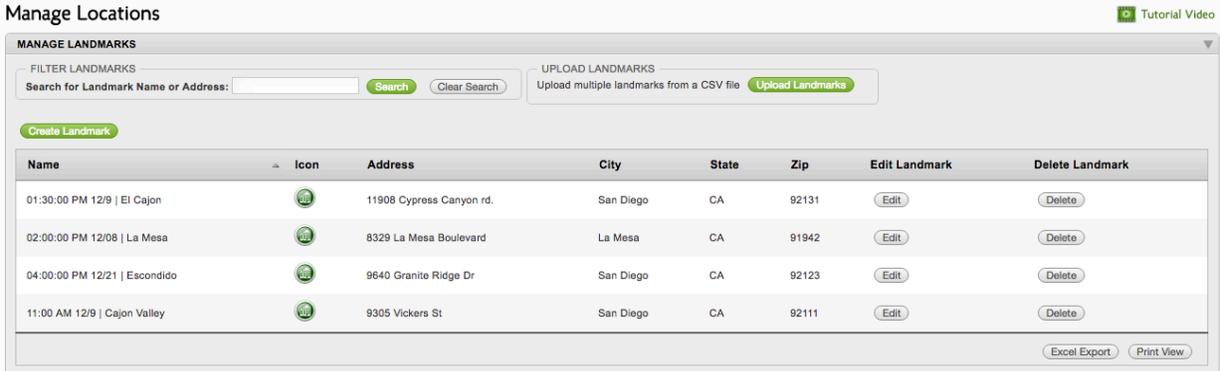
You can also disassociate an account with FieldLogix by going to the Credentials tab and selecting “disassociate account”. This will disconnect the integration between both systems.



## Verify the Integration

Verify that the integration is working by logging into your FieldLogix account and going to **Settings > Manage Locations**.

You will then see a list of locations under the “manage landmarks” section. If the integration is working, you should see a list of your service appointments similar to the image below.



The screenshot displays the 'Manage Locations' interface. At the top right, there is a 'Tutorial Video' link. Below the title, there are two sections: 'FILTER LANDMARKS' with a search bar and 'CLEAR SEARCH' button, and 'UPLOAD LANDMARKS' with a description and an 'Upload Landmarks' button. A 'Create Landmark' button is also present. The main area contains a table with the following data:

Name	Icon	Address	City	State	Zip	Edit Landmark	Delete Landmark
01:30:00 PM 12/9   El Cajon		11908 Cypress Canyon rd.	San Diego	CA	92131	<a href="#">Edit</a>	<a href="#">Delete</a>
02:00:00 PM 12/08   La Mesa		8329 La Mesa Boulevard	La Mesa	CA	91942	<a href="#">Edit</a>	<a href="#">Delete</a>
04:00:00 PM 12/21   Escondido		9640 Granite Ridge Dr	San Diego	CA	92123	<a href="#">Edit</a>	<a href="#">Delete</a>
11:00 AM 12/9   Cajon Valley		9305 Vickers St	San Diego	CA	92111	<a href="#">Edit</a>	<a href="#">Delete</a>

At the bottom right of the table, there are 'Excel Export' and 'Print View' buttons.

Contact us at [support@fieldlogix.com](mailto:support@fieldlogix.com) if you should encounter any problems with setting up the integration.