

TelematicsConnect App Installation and Setup Guide

TelematicsConnect App Version 1.364

May - 2024

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AVAILABLE ON

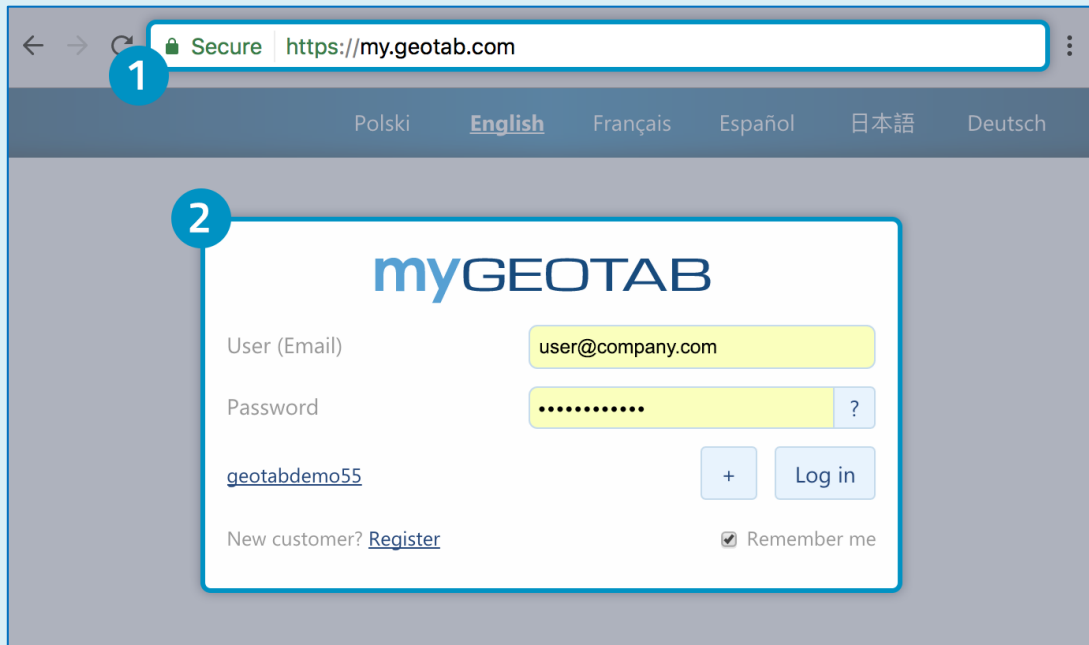


appexchange

TelematicsConnect App Requirements

TelematicsConnect App integrates Telematics Service Providers, as example Geotab (www.geotab.com), with [Salesforce.com](https://www.salesforce.com).

To setup Telematics Connect App, pls contact GPS Dashboard. You will need to add GPS Dashboard as a User in your Telematics Account.

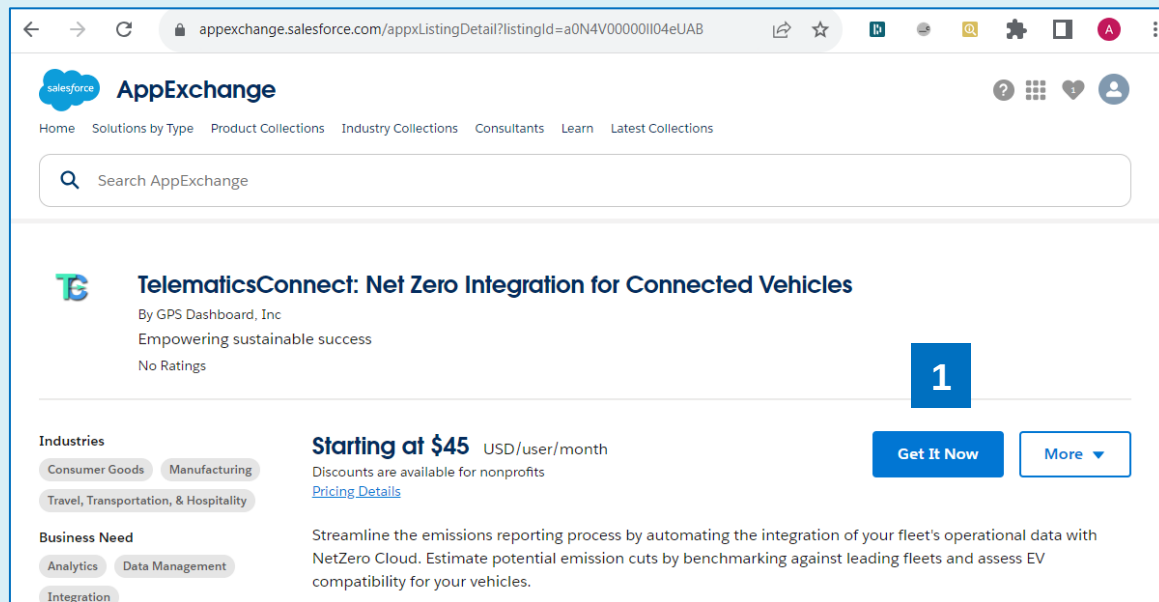


The screenshot shows a web browser window with the URL <https://my.geotab.com>. The browser's address bar is highlighted with a blue circle and the number 1. The page features a dark blue header with language options: Polski, **English**, Français, Español, 日本語, and Deutsch. The main content area is white and contains the myGEOTAB logo. Below the logo are two input fields: 'User (Email)' with the value 'user@company.com' and 'Password' with masked characters. A blue circle with the number 2 is positioned to the left of the login form. Below the password field is a link for 'geotabdemo55'. To the right of the password field are two buttons: a '+' button and a 'Log in' button. At the bottom left, there is a link for 'New customer? Register'. At the bottom right, there is a checkbox labeled 'Remember me' which is checked.

TelematicsConnect App Installation

Find TelematicsConnect App by searching the [Salesforce AppExchange](#). Once you find the Listing Page, click "**Get It Now**" button.

Note: Optionally, you can install Telematics App by clicking a URL provided
By GPS Dashboard, please contact us for details.



TelematicsConnect App Installation

1. Select **"Install For All Users"**
2. Click **"Install"**

Note: A User will gain access to TelematicsConnect App if / when you assign the User a Telematics Connect App license. Instruction in following pages



Install TelematicsConnect

By TelematicsConnect by GPS Dashboard



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

1

2

Install

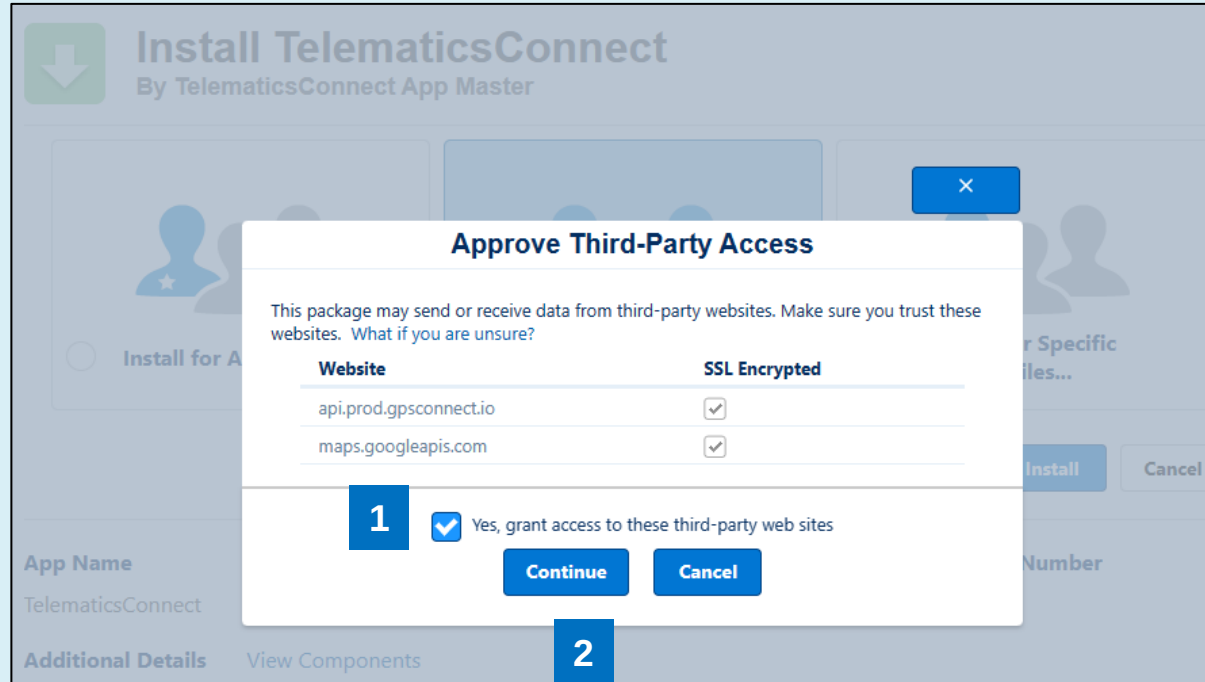
Cancel

App Name	Publisher	Version Name	Version Number
TelematicsConnect	TelematicsConnect by GPS Dashboard	TelematicsConnect Spring 24	1.364

[Additional Details](#) [View Components](#)

TelematicsConnect App Installation

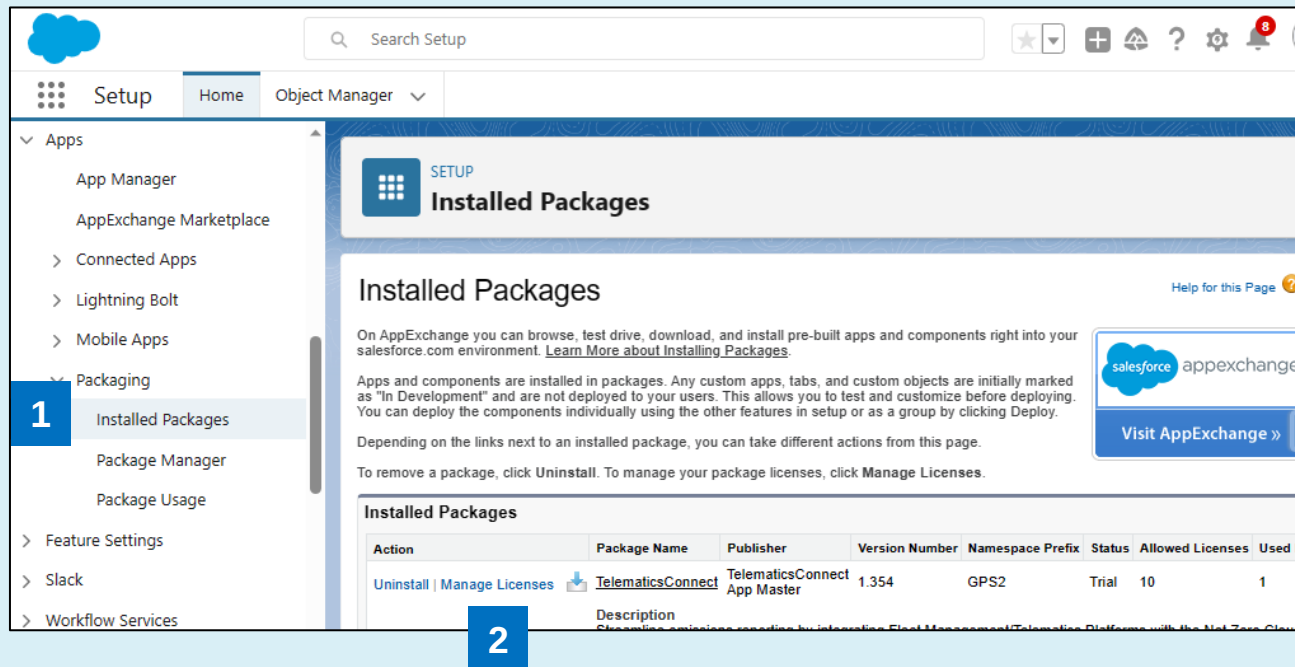
1. Check the **"Yes"** Checkbox
2. Click **"Continue"**



Assign User Licenses

1. From Setup > Installed Packages

2. Click “**Manage Licenses**” for Telematics Connect App



The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area displays the 'Installed Packages' page. The page title is 'Installed Packages'. Below the title, there is a section titled 'Installed Packages' with a description: 'On 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.](#)'

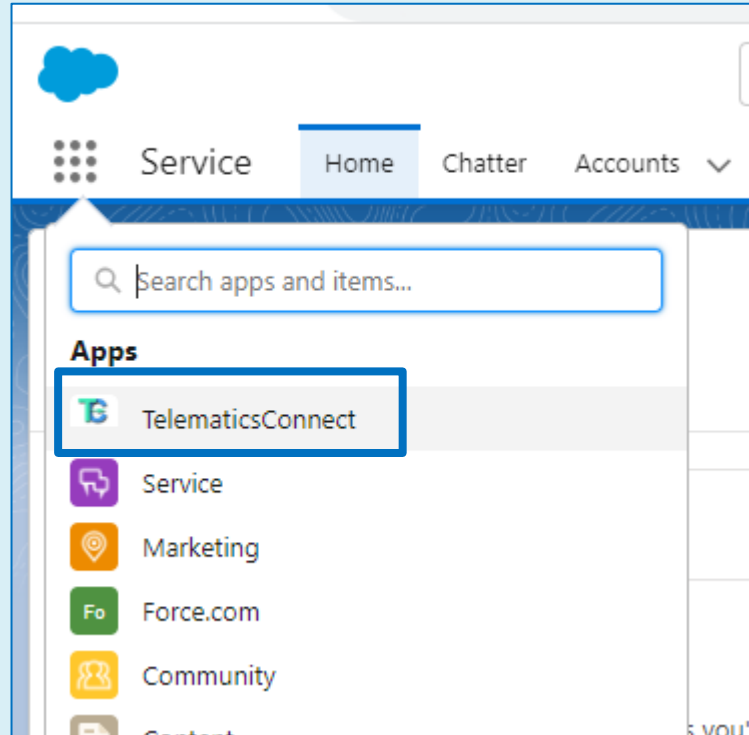
Below the description, there is a table of installed packages. The table has the following columns: Action, Package Name, Publisher, Version Number, Namespace Prefix, Status, Allowed Licenses, and Used Licenses. The table contains one row for the 'TelematicsConnect App Master' package.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses
Uninstall Manage Licenses	TelematicsConnect App Master	TelematicsConnect	1.354	GPS2	Trial	10	1

The 'Manage Licenses' link is highlighted in blue. A blue box with the number '2' is placed over the 'Manage Licenses' link.

TelematicsConnect App Set-up

From App Menu
click **TelematicsConnect**

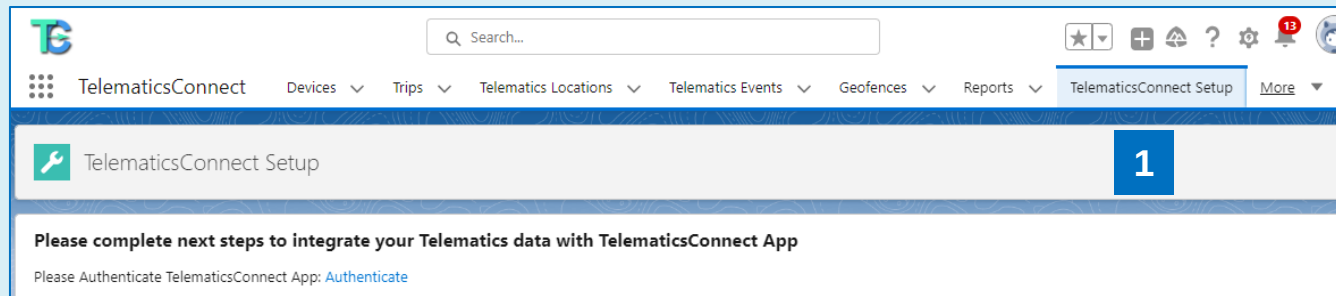


TelematicsConnect App Set-up

When the TelematicsConnect App is selected, the App logo appears on top left, and custom tabs are displayed.

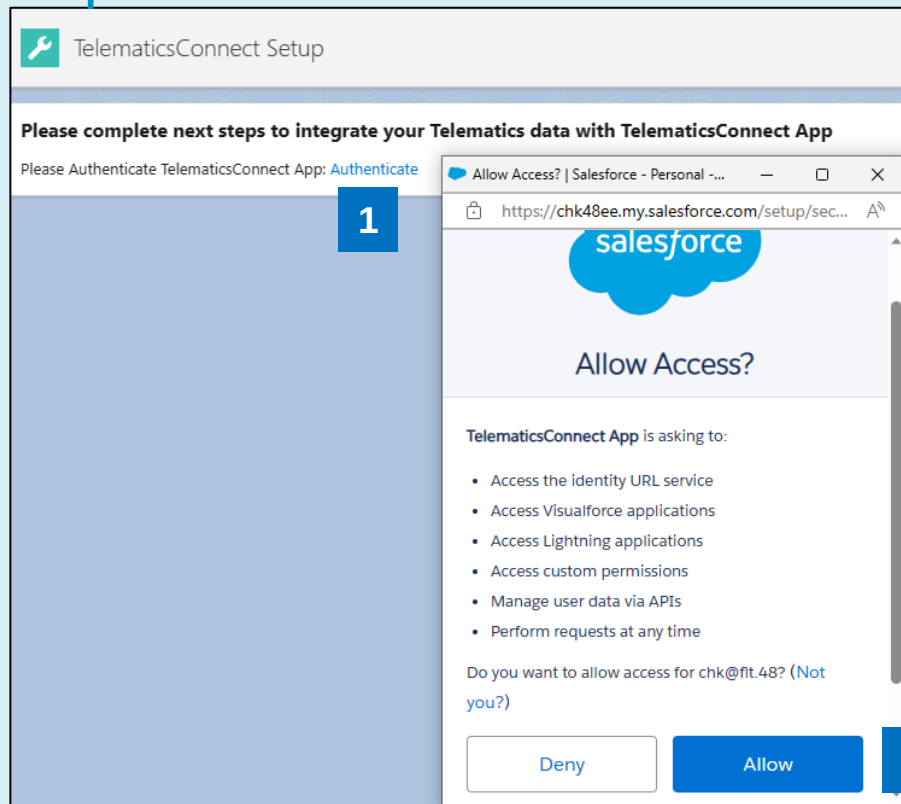
Click the “TelematicConnect Setup” tab.

You may need to extend TelematicsConnect App Menu (“More” drop down arrow) to view this tab.



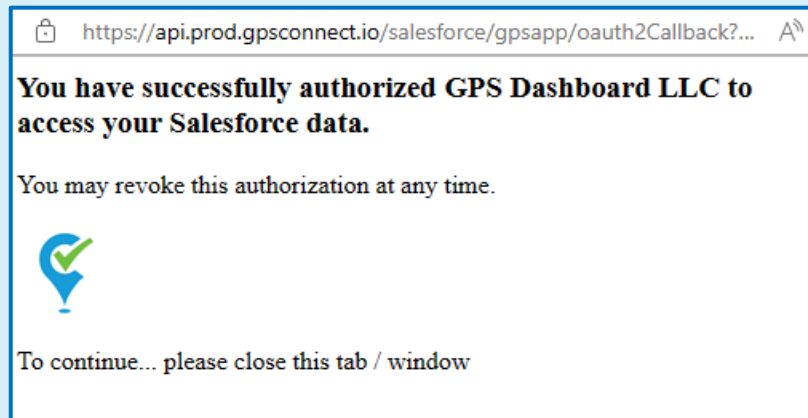
TelematicsConnect App Set-up

1. In "TelematicsConnect Setup" page, click "**Authenticate**"
2. Click "**Allow**" in popup



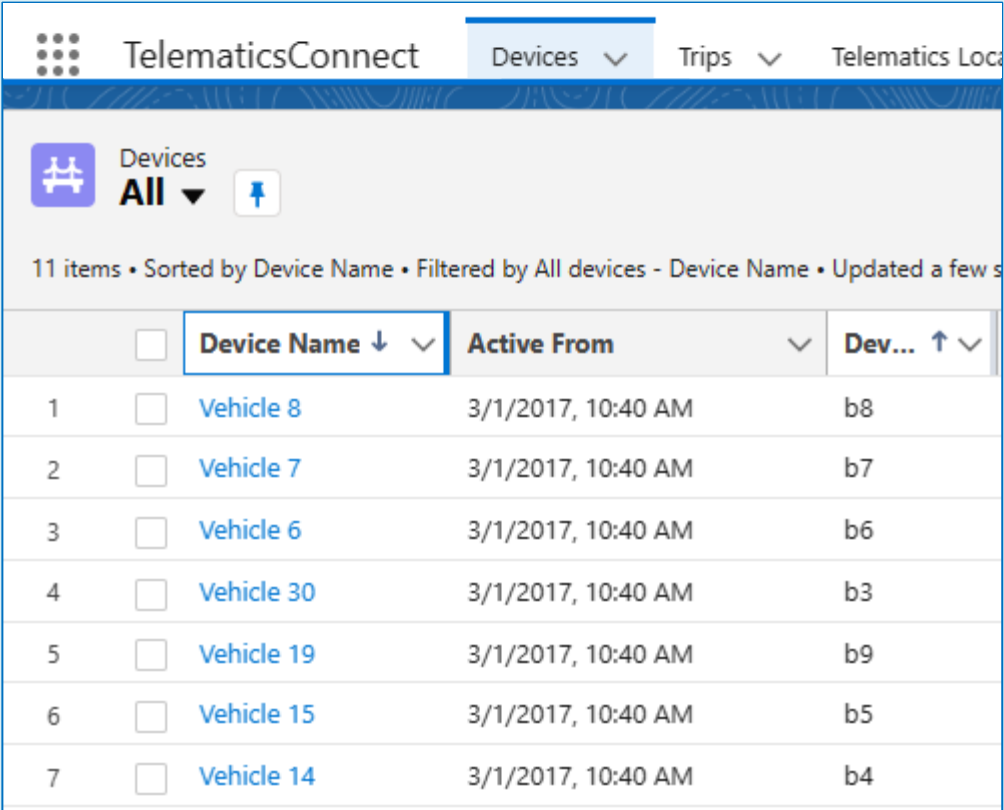
Salesforce Authentication

1. A new separate window with message "You have authorized ..." will display, **close the window**
2. Click **Previous** to return to the Telematics Setup page



Devices

1. Click “**Devices**” tab
2. Click “**All**” list view
3. Devices will auto sync,
within one or two hours
after authentication.



TelematicsConnect				
Devices				
11 items • Sorted by Device Name • Filtered by All devices - Device Name • Updated a few s				
	☐	Device Name ↓	Active From	Dev... ↑
1	☐	Vehicle 8	3/1/2017, 10:40 AM	b8
2	☐	Vehicle 7	3/1/2017, 10:40 AM	b7
3	☐	Vehicle 6	3/1/2017, 10:40 AM	b6
4	☐	Vehicle 30	3/1/2017, 10:40 AM	b3
5	☐	Vehicle 19	3/1/2017, 10:40 AM	b9
6	☐	Vehicle 15	3/1/2017, 10:40 AM	b5
7	☐	Vehicle 14	3/1/2017, 10:40 AM	b4

Activate Data Integration Rules to Geocode Account Addresses

1. Click **"Setup"**
2. Click **"Data Integration Rules"**
3. Data Integration Rules are displayed

The screenshot shows the GPS Dashboard interface. The top navigation bar includes a 'Setup' tab, which is highlighted. Below the navigation bar, the left sidebar contains a search bar and a list of options under the 'Data' category: 'Data Integration Metrics' and 'Data Integration Rules'. The 'Data Integration Rules' option is highlighted with a blue box and a circled '1'. The main content area is titled 'Data Integration Rules' and displays a table of rules. The table has columns for 'Name', 'Data Service', 'Description', and 'Object'. The table lists four rules, all using 'Data.com Geo' as the data service. A circled '2' is placed over the table's column headers.

Name	Data Service	Description	Object
Geocodes for Account Billing Address	Data.com Geo	Adds geocodes for Billing Address	Account
Geocodes for Account Shipping Address	Data.com Geo	Adds geocodes for Shipping Address	Account
Geocodes for Contact Mailing Address	Data.com Geo	Adds geocodes for Mailing Address	Contact
Geocodes for Lead Address	Data.com Geo	Adds geocodes for Address	Lead

Activate Data Integration Rules

1. Click rule name **"Geocodes for Account Billing Address"**

2. Click **"Activate"** button

Note: Repeat for other Addresses if desired: Account Shipping, Lead, and Contact

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

Name ↑	Data Service	Description
<u>Geocodes for Account Billing Address</u>	Data.com Geo	Adds geocodes for Billing Address
<u>Geocodes for Account Shipping Address</u>	Data.com Geo	Adds geocodes for Shipping Address
<u>Geocodes for Contact Mailing Address</u>	Data.com Geo	Adds geocodes for Mailing Address
<u>Geocodes for Lead Address</u>	Data.com Geo	Adds geocodes for Address

Account Data Integration Rule

Geocodes for Account Billing Address

[« Back to List: Data Integration Rules](#)

Data Integration Rules Edit Rule Settings Edit Field Mapping **2** Activate

Name	Geocodes for Account Billing Address
Description	Adds geocodes for Billing Address
Object	Account
Data Service	Data.com Geo
Update all records after this rule is activated or saved (recommended)	✓
Bypass Triggers	✓
Bypass Workflow Rules	✓
Leave last-modified information unchanged	✓
Current Status	Active - Enrichment
Created By	Automated Process, 6/25/2016 9:31 AM
Modified By	<u>Amin Mufti</u> , 3/31/2017 12:53 PM

TelematicsConnect Geofence Setup

Config of this feature is located in *Setup > Develop > Custom Metadata Types*

New Custom Metadata Type					
Action	Label	Installed Package	Namespace Prefix	Visibility	API Name
Manage Records	 Latest Location	TelematicsConnect	GPS2	Public	GPS2__latestLocations__mdt
Manage Records	 TelematicsConnect Geofence Setup	TelematicsConnect	GPS2	Public	GPS2__telematicsGeofenceSetup__mdt

1

1. Click **"Manage Records"** to edit parameters
2. Click "Edit"

Setup Geofences. Designate Objects to create a related Geofence, identify the fields used to populate the created Geofence, and optionally the fields to be populated when a vehicle stops at the Geofence. Example on right uses "Account"


SETUP
Custom Metadata Types

TelematicsConnect Geofence Setup (M

 This TelematicsConnect Geofence Setup is managed, meaning that

TelematicsConnect Geofence Setup Edit
Save Save

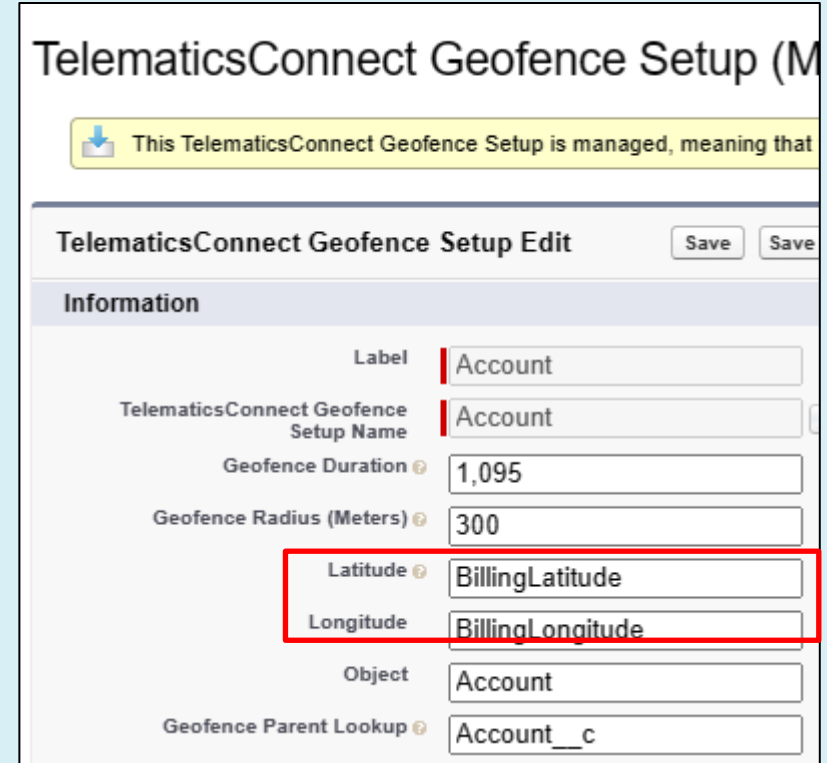
Information

Label	Account
TelematicsConnect Geofence Setup Name	Account
Geofence Duration ⓘ	1,095
Geofence Radius (Meters) ⓘ	300
Latitude ⓘ	BillingLatitude
Longitude	BillingLongitude

TelematicsConnect Geofence Setup

You can change default BillingLatitude and BillingLongitude to ShippingLatitude and ShippingLongitude or other fields that contain the account Geolocation.

The values saved in the metadata is then used when creating a Geofence from an Account.



The screenshot shows the 'TelematicsConnect Geofence Setup (M)' form. At the top, a yellow banner with a download icon states: 'This TelematicsConnect Geofence Setup is managed, meaning that'. Below this is the 'TelematicsConnect Geofence Setup Edit' header with two 'Save' buttons. The 'Information' section contains several fields: 'Label' (Account), 'TelematicsConnect Geofence Setup Name' (Account), 'Geofence Duration' (1,095), 'Geofence Radius (Meters)' (300), 'Latitude' (BillingLatitude), 'Longitude' (BillingLongitude), 'Object' (Account), and 'Geofence Parent Lookup' (Account__c). The 'Latitude' and 'Longitude' fields are highlighted with a red rectangle.

TelematicsConnect Geofence Setup Edit	
Information	
Label	Account
TelematicsConnect Geofence Setup Name	Account
Geofence Duration	1,095
Geofence Radius (Meters)	300
Latitude	BillingLatitude
Longitude	BillingLongitude
Object	Account
Geofence Parent Lookup	Account__c

Telematics Geofence Setup

You can replace the value of Checkbox "**Is_create_Geofence_c**" to any other checkbox field.

Geofence is auto created if this checkbox is set = **TRUE** on the account page.

TelematicsConnect Geofence Setup (Man

 This TelematicsConnect Geofence Setup is managed, meaning that you n

TelematicsConnect Geofence Setup Edit Save Save & New

Information

Label	Account
TelematicsConnect Geofence Setup Name	Account 
Geofence Duration 	1,095
Geofence Radius (Meters) 	300
Latitude 	BillingLatitude
Longitude	BillingLongitude
Object	Account
Geofence Parent Lookup 	Account__c
Create Related Geofence 	Create_Related_Geofence__
Total Driving Hours 	totalDrivingHours__c

Geofence Captured on a Trip Record

A Trip is auto-tagged with a Geofence if the vehicle stops within the Geofence radius.

In example below Vehicle 7 stopped within Geofence "ABC Incorporated" on 3/21/2023 and was stopped at that location for 5 Minutes.

TelematicsConnect Devices ▼ Trips ▼ Telematics Locations ▼ Telematics Events ▼ Geofences ▼ Reports ▼ Dashboards ▼ Trips Map ▼ More ▼									
Trips All Records ▼									
50+ items • Sorted by Start Time • Filtered by All trips - Service Provider • Updated a few seconds ago									
	☐ Device Tri... ▼	Start Time ↓ ▼	Stop Time ▼	Next Tri... ▼	Device ▼	Geofence ▼	Stop (Min) ▼	Driving (Min) ▼	Distance (Miles)
1	☐ TR-1736	3/21/2023, 8:27 AM	3/21/202...	3/21/202...	Vehicle 7	ABC Incorport...	5.00	25.70	9.34