TelematicsConnect: User Guide

Oct 25, 2026 · @Amin

TelematicsConnect brings your vehicles' trips, events and positions from your telematics provider (for example Geotab) into Salesforce, and works out who drove each trip. This guide covers TelematicsConnect version 1.388 and later.

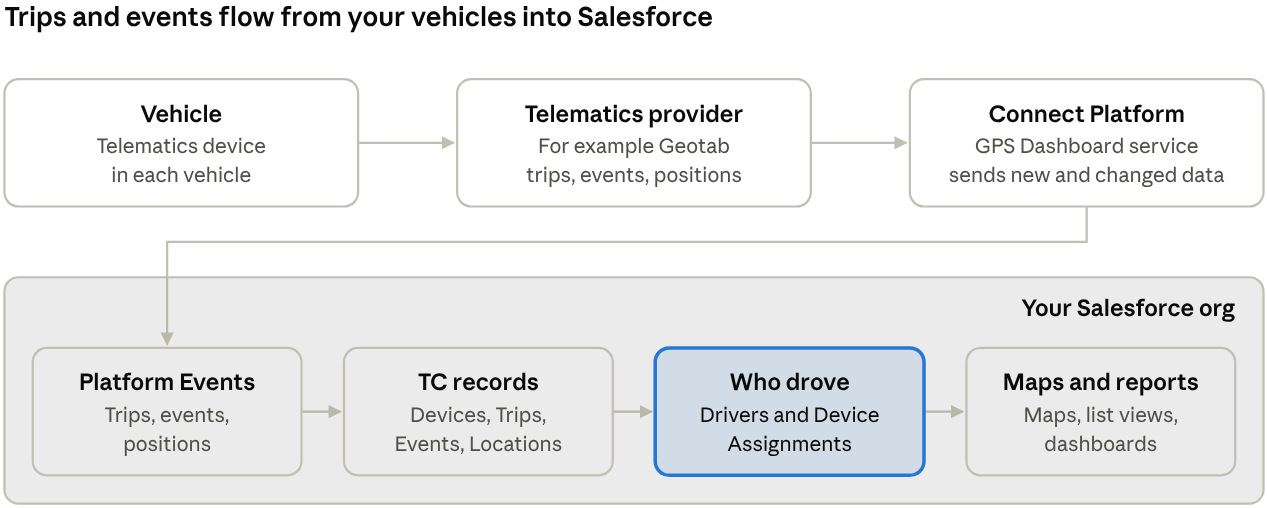
- **Part A, User Guide**: for dispatchers, fleet managers and admins who use TelematicsConnect every day.
- **Part B, Admin Setup**: for your Salesforce admin, step by step with checklists.

If you also use field service, the separate **TC Extension for Field Service: User Guide** covers matching trips to Service Appointments.

Part A: User Guide

A1. What TelematicsConnect does

Your telematics provider records each vehicle's trips, events and positions. GPS Dashboard's Connect Platform sends new and changed data to your Salesforce org, where TelematicsConnect saves it as records, works out who drove, and shows it on maps, list views and reports.



how it works · from the vehicle to Salesforce

Everything after the Connect Platform runs inside your Salesforce org. TelematicsConnect never changes data in your telematics provider.

A2. Key terms

Term	Meaning
Device	One vehicle's telematics device, as your provider knows it. Its provider ID stays the same when the hardware is swapped
Trip	One drive of a vehicle, from ignition on to ignition next ignition on, with distance, durations, speeds, the stop location, and stop duration.
Telematics Event	Something that happened on a vehicle at a point in time, for example a geofence entry or exit, or a fill-up
Exception Event	A rule broken on a vehicle, for example speeding or harsh braking. The rule itself is an **Exception Rule**
Telematics Location	One recorded position of a vehicle
Last Telematics Location	Each Device's most recent position, used by the maps
Geofence	A circle around a place (a customer site, a depot) with a radius in meters. Trips that stop inside it are linked to it
Driver	A driver ID from your provider (for example **b3**), linked to the Salesforce User who is that driver
Device Assignment	A Device linked to a User for a period. **Manual** ones are created by your admin; **Automatic** ones are created from driver assignment in the telematics provider platform, by driver log-ins or supervisor assignment.

Term	Meaning
Resolved User	Who drove a trip or caused an event, decided by TelematicsConnect when the trip, event or exception record is created. Telematics Events may not include a driver ID; then the vehicle's manual Device Assignment is used
Driver Not Mapped	A record whose driver ID has no Driver, or whose Driver has no Salesforce User yet
Telematics Daily Summary	One Device's totals for one day: distance, driving, idling and stop time

A3. Devices

Each vehicle appears once as a **Device**. Your provider is the master list: TelematicsConnect adds new Devices and updates changed ones automatically, so edit Devices in your provider's system, not in Salesforce.

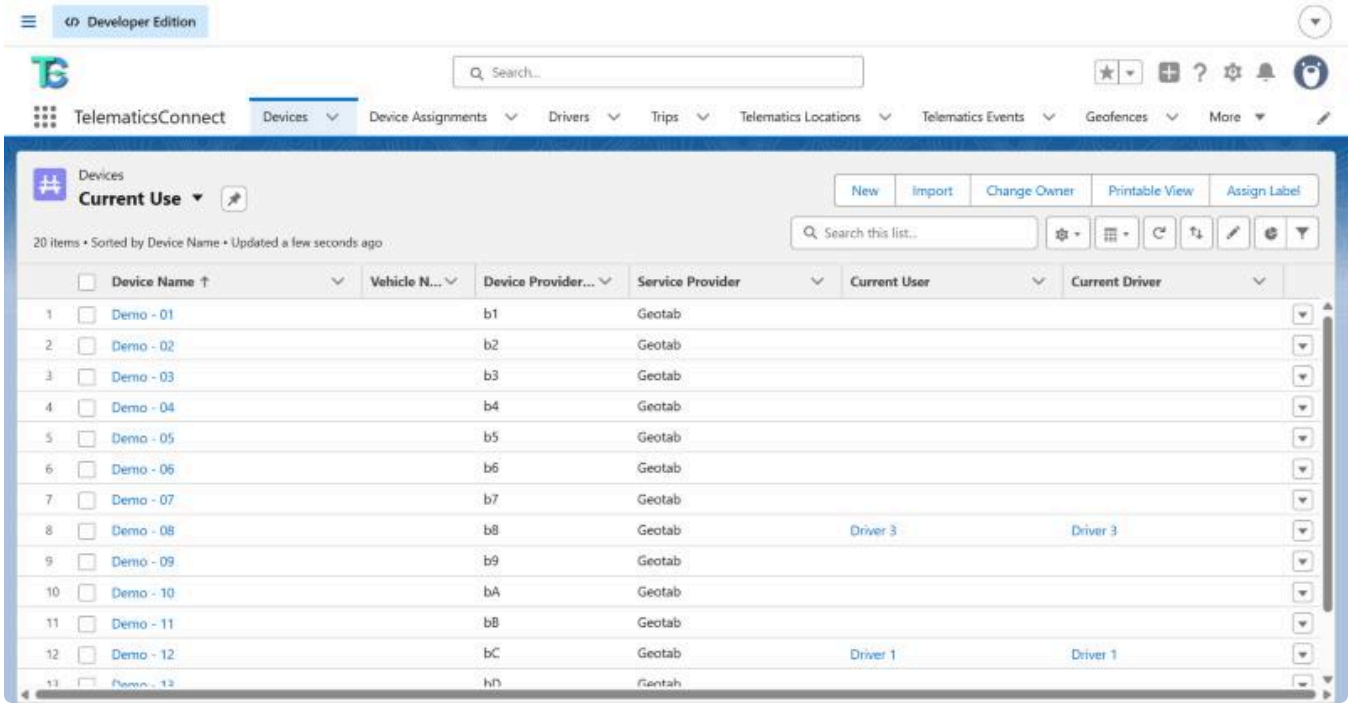
Field	What it tells you
Device Name, Vehicle Name, VIN	Which vehicle it is
Device Provider ID, Service Provider	The device's ID and the provider it comes from
Current User, Current Driver	Who has the vehicle now, copied from its Device Assignments (see below)
Active From, Active To, Expired	When the device is active. **Expired** is checked once Active To has passed
Vehicle Specification	Weight class and fuel type, where your provider sends them
Last Location Map	Opens a map of the vehicle's last position

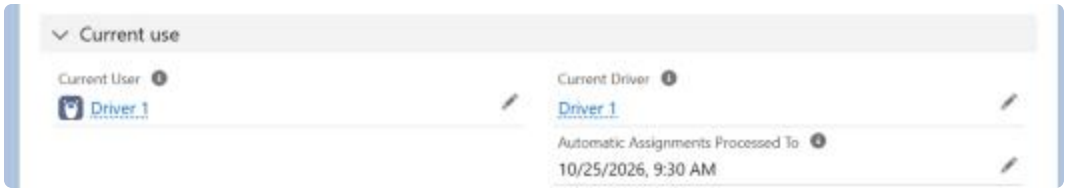
The **Current Use** list view shows every Device with its Current User and Current Driver. To hide vehicles you no longer use, filter on **Expired** = false; a deleted Device is recreated by the next update from your provider.

Current User and Current Driver are a copy. Device Assignments (A9) are the record of who had each vehicle and when. TelematicsConnect copies who has it **now** onto the Device, so the Current Use list view, reports and the maps' **Select Users** filter can show it as a simple column:

1. A driver is on the vehicle (an open automatic assignment whose driver is linked to a user) → that user and driver.
2. Otherwise, a manual assignment covering now → that user; Current Driver is blank.
3. Otherwise → both blank.

The copy is refreshed when the vehicle's trips arrive and when an admin changes a manual assignment. Who drove each trip is always worked out from the assignments themselves, not from these fields.



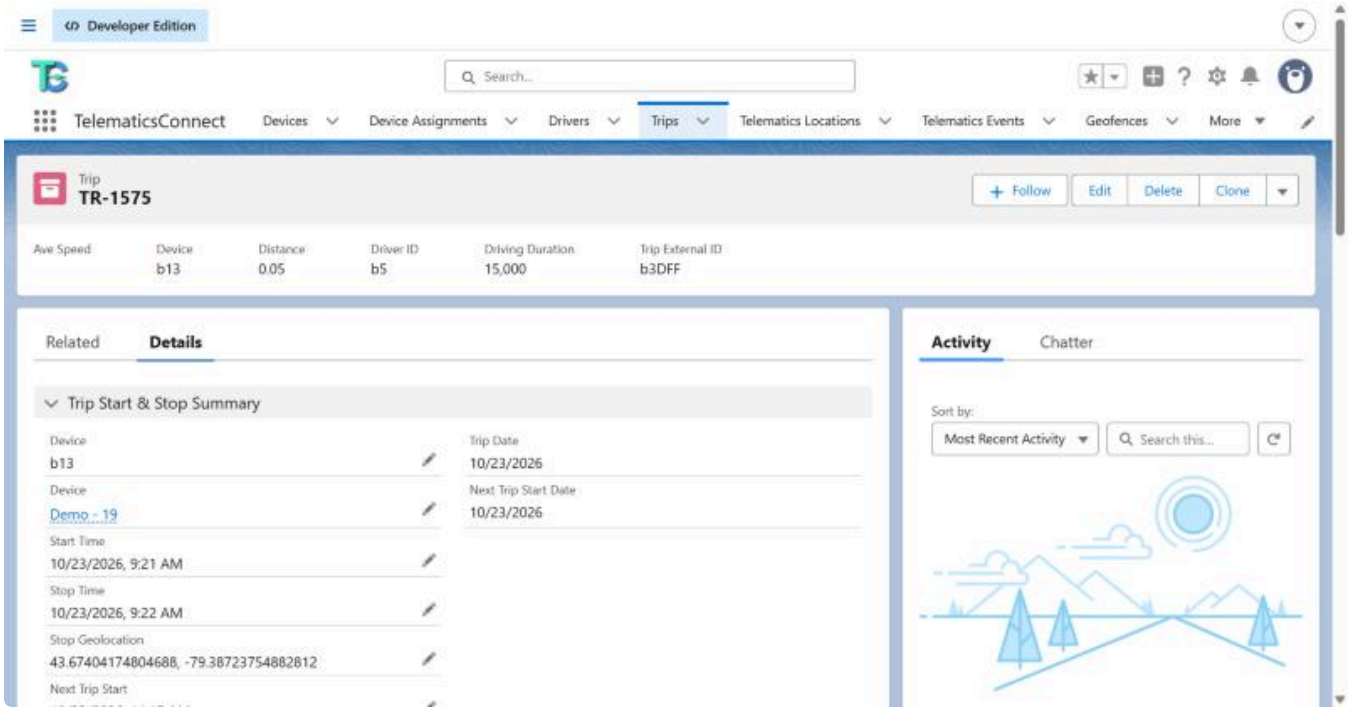


A4. Trips

A **Trip** is one drive of a vehicle. Your provider sends each trip once it starts, ignition on, and updates it until it ends, next ignition on.

Field	Units and meaning
Device	The vehicle
Start Time, Stop Time, Trip Date	When the drive started and ended
Start Geolocation, Stop Geolocation	Where it started and stopped
Distance, Distance (KM), Distance (Miles)	Distance in kilometers, and converted to miles
Driving, Idling, Stop (Min / Hrs)	Time driving, time idling with the engine on, and stop time from ignition off until the next ignition on
Next Trip Start	When the vehicle's next trip started, which ends this trip's stop
Ave Speed (MPH), Max Speed (MPH)	Speeds converted from km/h
Fuel Consumed	Fuel used on the trip, where your provider sends it
Geofence, Distance To Geofence	The geofence the trip stopped in, when geofence matching is on (see A8)
Driver ID	The driver ID your provider sent. `UnknownDriverId` means no driver logged in
Resolved User, Resolved Driver, Resolution Source, Driver Not Mapped	Who drove (see A9)

The minutes and hours fields are calculated from the provider's durations, and the miles fields from kilometers, using the conversion factors in the TelematicsConnect App settings (B5).

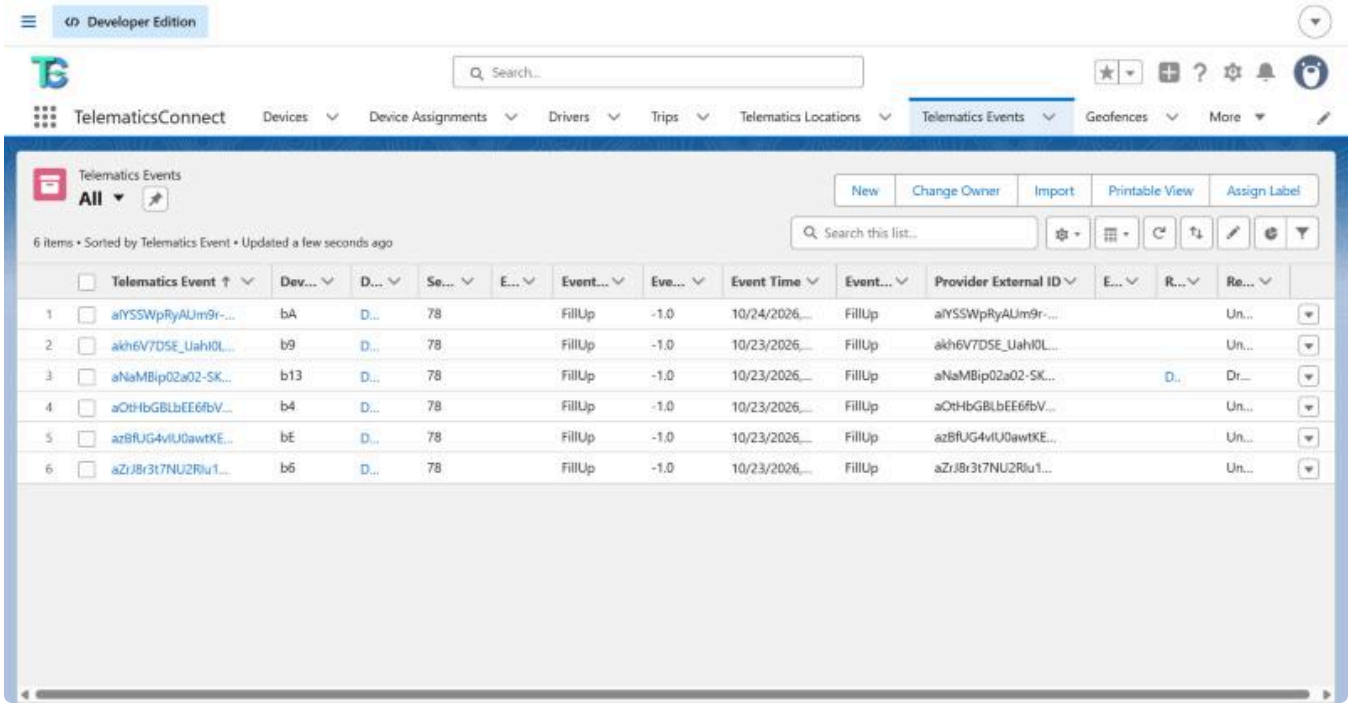


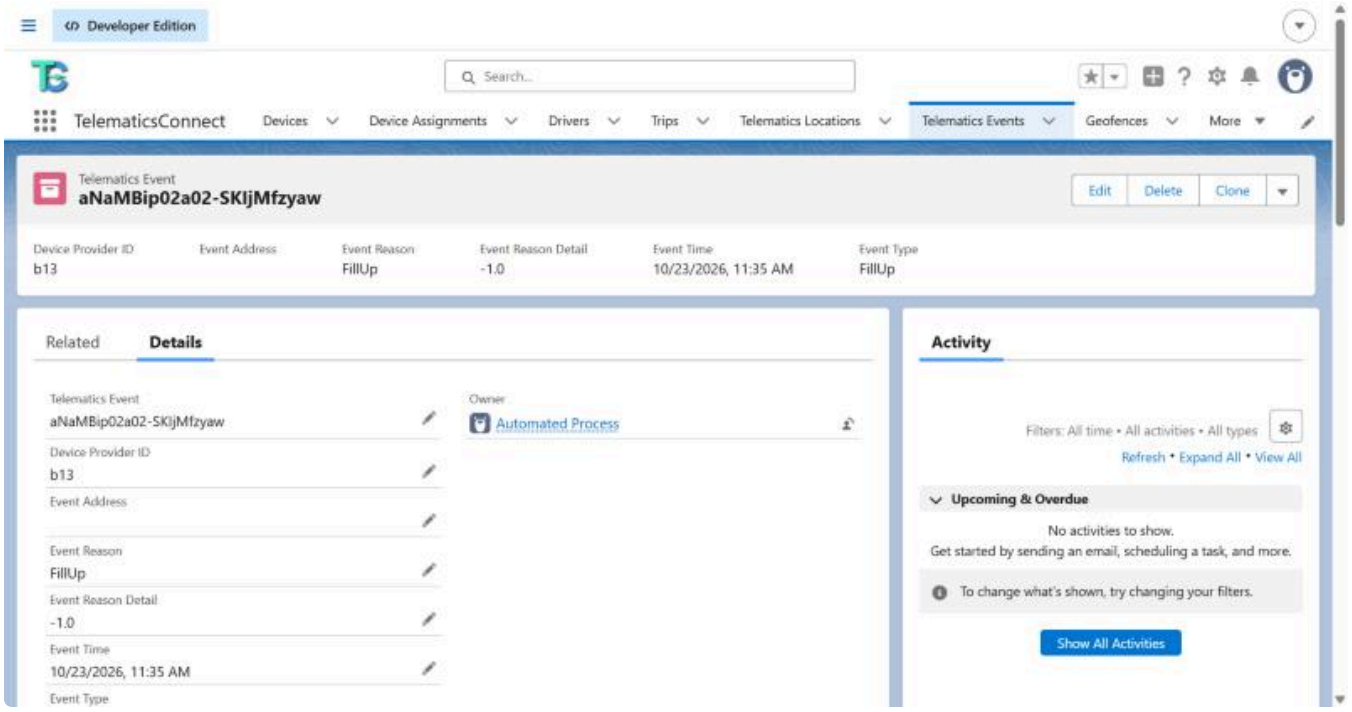
A5. Telematics Events and fill-ups

A **Telematics Event** records something that happened on a vehicle at one moment. **Event Reason** says what it was, and **Event Reason Detail** adds the specifics.

- **Fill-ups** are Telematics Events with Event Reason FillUp. The amount and its source are in Other Details. Filter the Telematics Events tab or a report on Event Reason to list them.
- Each event also has **Event Time**, **Event Geolocation**, **Speed (MPH)**, **Odometer (Miles)** and **Distance (Miles)**.
- Events get the same who-drove fields as trips (A9). Their **Driver Not Mapped** and **Unassigned** list views work the same way. Not every event includes a driver ID; without one, the vehicle's manual Device Assignment is used.

A newer event also updates the vehicle's Last Telematics Location (A7).


Developer Edition
Search...
TelematicsConnect
Devices
Device Assignments
Drivers
Trips
Telematics Locations
Telematics Events
Geofences
More
Telematics Events
All
New
Change Owner
Import
Printable View
Assign Label
6 items • Sorted by Telematics Event • Updated a few seconds ago
Search this list...
Telematics Event
Dev...
D...
Se...
E...
Event...
Eve...
Event Time
Event...
Provider External ID
E...
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Re...
1 aIYSSWpRyALm9r-... bA D... 78 FillUp -1.0 10/24/2026,... FillUp aIYSSWpRyALm9r-... Un...
2 akh6V7DSE_UahI0L... b9 D... 78 FillUp -1.0 10/23/2026,... FillUp akh6V7DSE_UahI0L... Un...
3 aNaMBip02a02-SK... b13 D... 78 FillUp -1.0 10/23/2026,... FillUp aNaMBip02a02-SK... D.. Dr...
4 aOtHbGBLbEE6fbV... b4 D... 78 FillUp -1.0 10/23/2026,... FillUp aOtHbGBLbEE6fbV... Un...
5 azBfUG4vIU0awtKE... bE D... 78 FillUp -1.0 10/23/2026,... FillUp azBfUG4vIU0awtKE... Un...
6 aZrJ8r3t7NU2RIu1... b6 D... 78 FillUp -1.0 10/23/2026,... FillUp aZrJ8r3t7NU2RIu1... Un...


Developer Edition
Search...
TelematicsConnect
Devices
Device Assignments
Drivers
Trips
Telematics Locations
Telematics Events
Geofences
More
Telematics Event
aNaMBip02a02-SKIjMfzyaw
Edit
Delete
Clone
Device Provider ID
b13
Event Address
Event Reason
FillUp
Event Reason Detail
-1.0
Event Time
10/23/2026, 11:35 AM
Event Type
FillUp
Related
Details
Telematics Event
aNaMBip02a02-SKIjMfzyaw
Device Provider ID
b13
Event Address
Event Reason
FillUp
Event Reason Detail
-1.0
Event Time
10/23/2026, 11:35 AM
Event Type
Owner
Automated Process
Activity
Filters: All time • All activities • All types
Refresh • Expand All • View All
Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
To change what's shown, try changing your filters.
Show All Activities

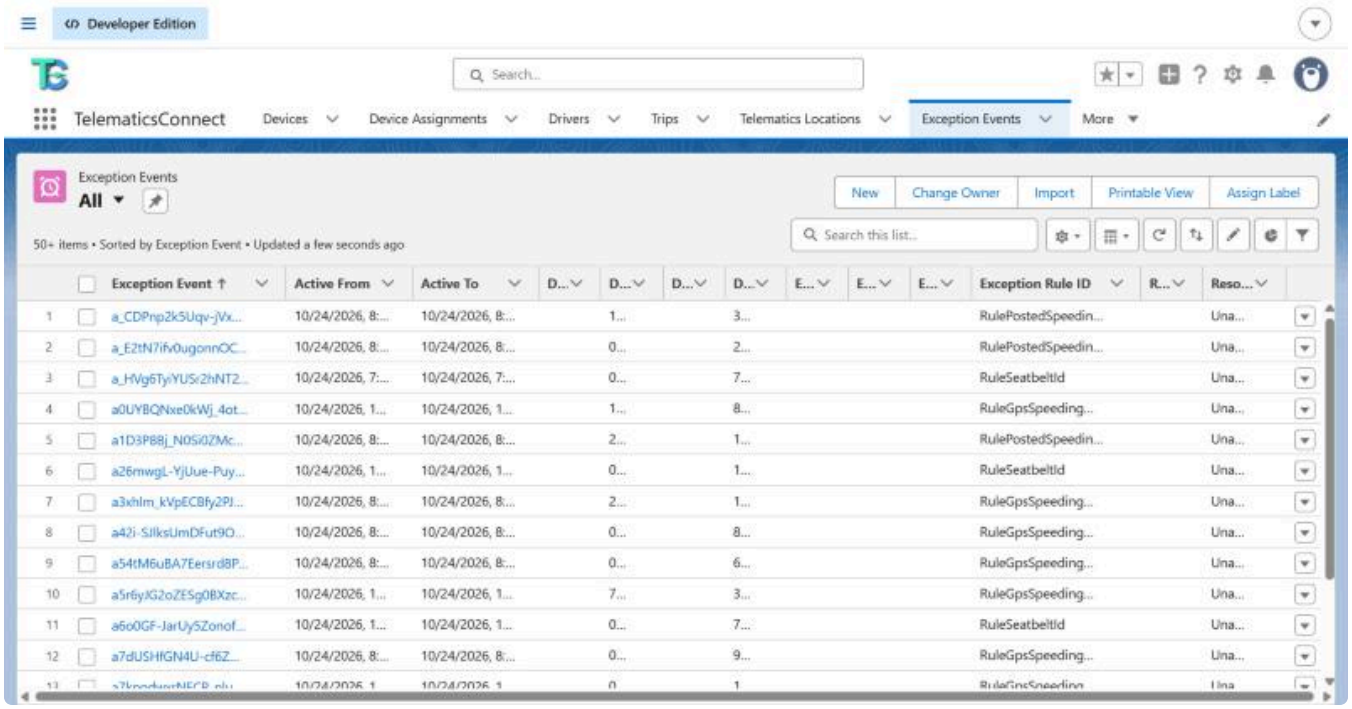

Driver resolution
Resolved User
Driver 1
Resolved Driver
Driver 1
Resolution Source
Driver
Driver Not Mapped

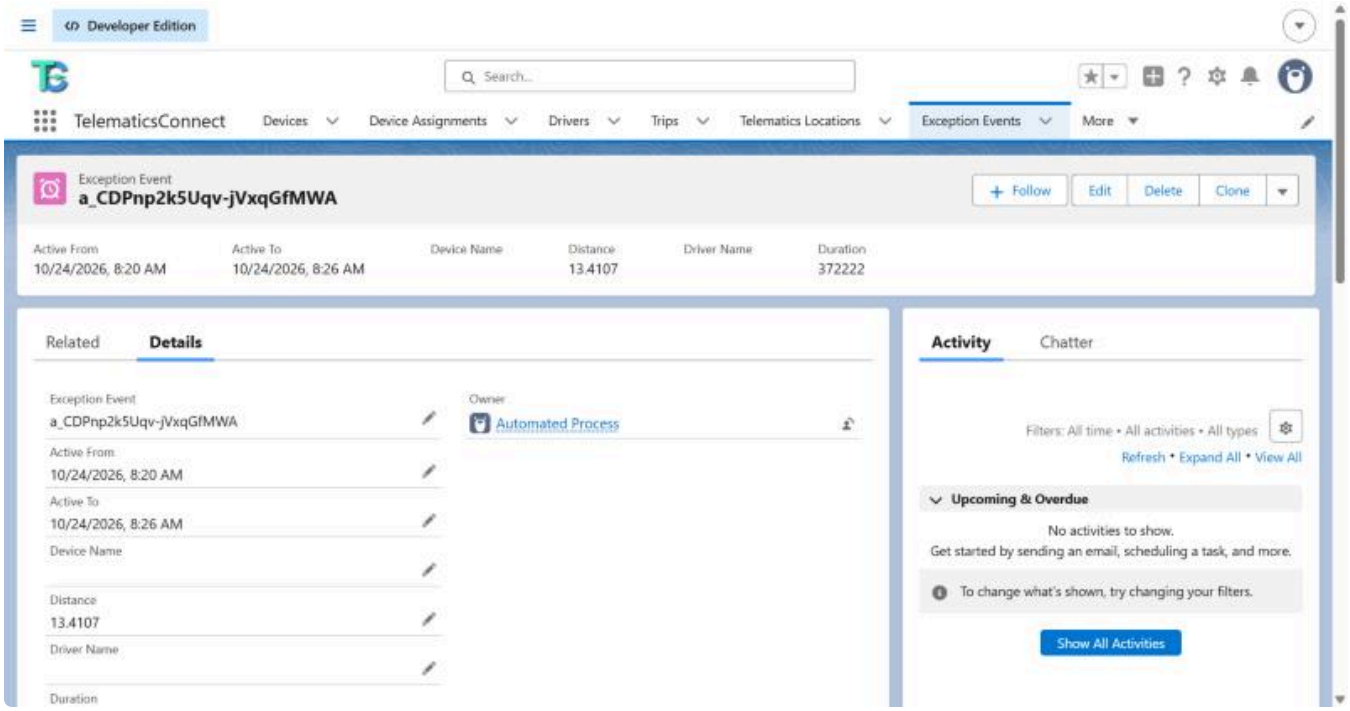
A6. Exception Events and Exception Rules

An **Exception Event** is a rule broken on a vehicle, for example speeding or harsh braking, as defined in your provider's system.

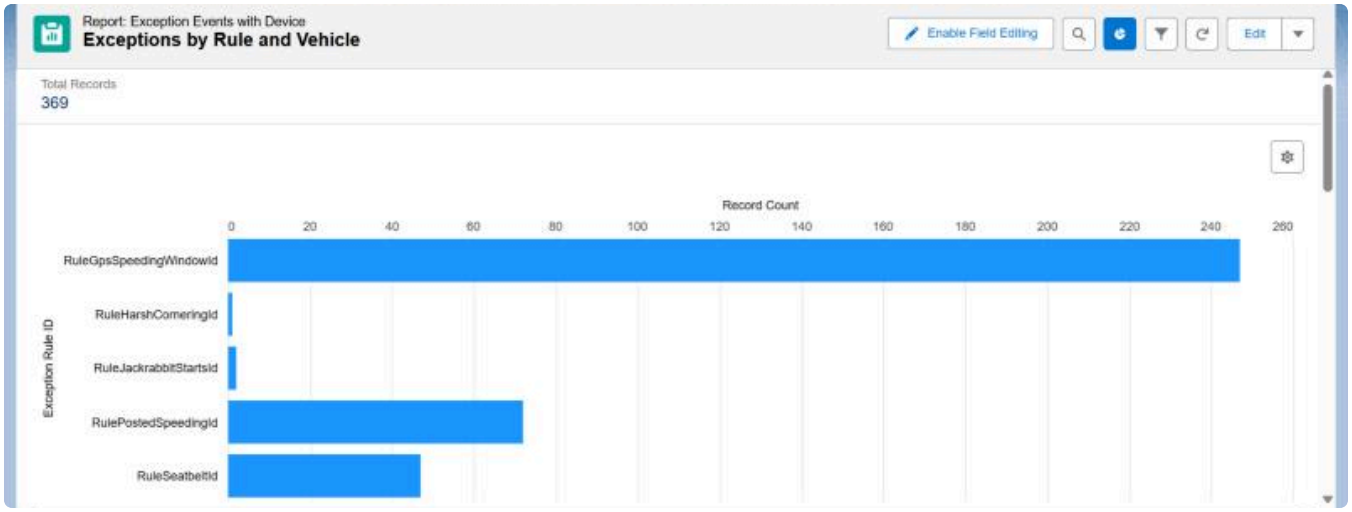
- **Exception Rule ID** says which rule (for Geotab, for example RulePostedSpeedingId). **Exception Rule Name** and **Exception Type** are filled in when your provider sends them. **Active From** and **Active To** say when it started and ended; **Duration** and **Distance** say for how long.
- **Device** links it to the vehicle; who drove is filled in as for trips (A9).
- **Exception Rules** lists the rules your provider sends, and appears only if your rules are exported too. Exception Events store the rule as text, so report on exceptions by **Exception Rule ID**.

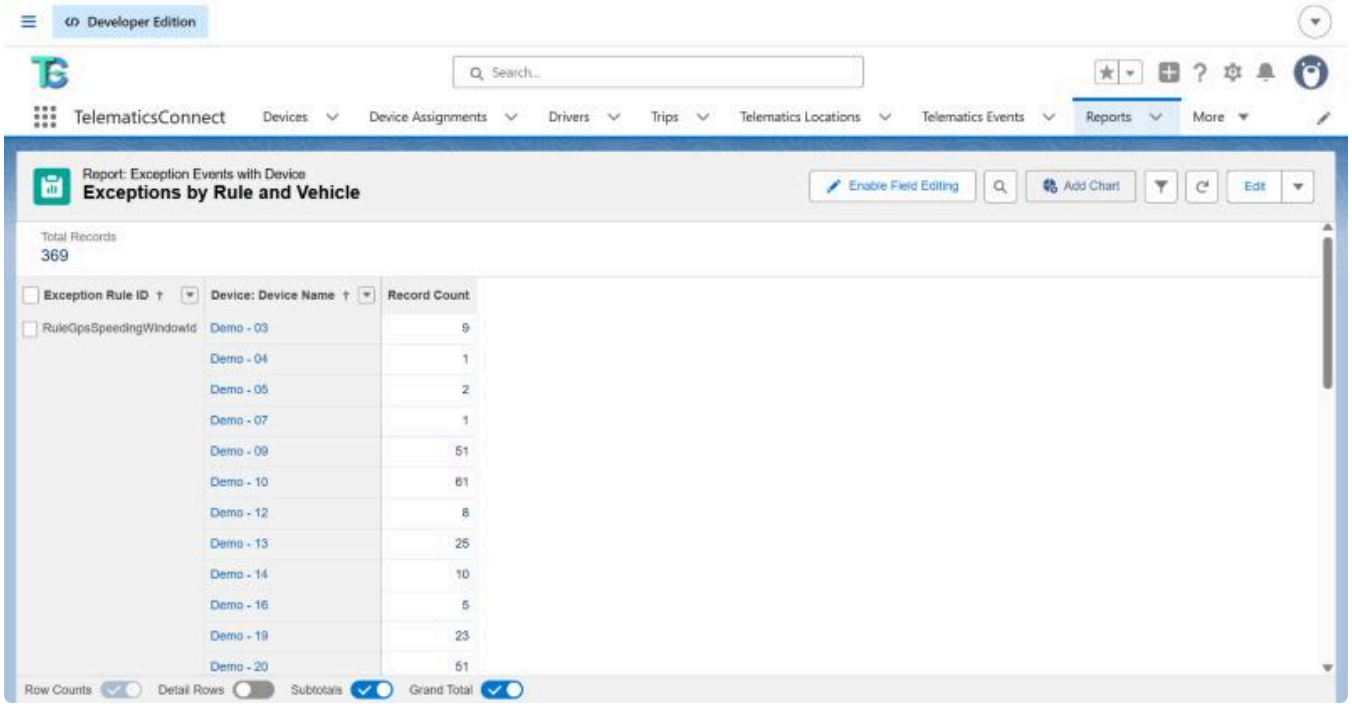
TelematicsConnect stores exceptions as your provider reports them. It doesn't create or change rules.





See exceptions as counts. The report **Exceptions by Rule and Vehicle** (A11) shows which rules are broken most, and by which vehicles. Geotab's built-in rules have readable IDs such as RuleGpsSpeedingWindowId or RuleSeatbeltId; rules your organization created in Geotab appear as a coded ID, so the report keeps only IDs starting with "Rule".





Compare vehicles. Speeding outnumbers every other rule, so a chart per rule hides the rest. The report **Exceptions by Vehicle and Rule** shows a stacked bar per vehicle: each vehicle's mix of rules, one color per rule. Filter **Device: Device Name** to compare the vehicles you choose; the example compares the vehicles that broke all three common rules (GPS speeding, posted speeding, seatbelt).

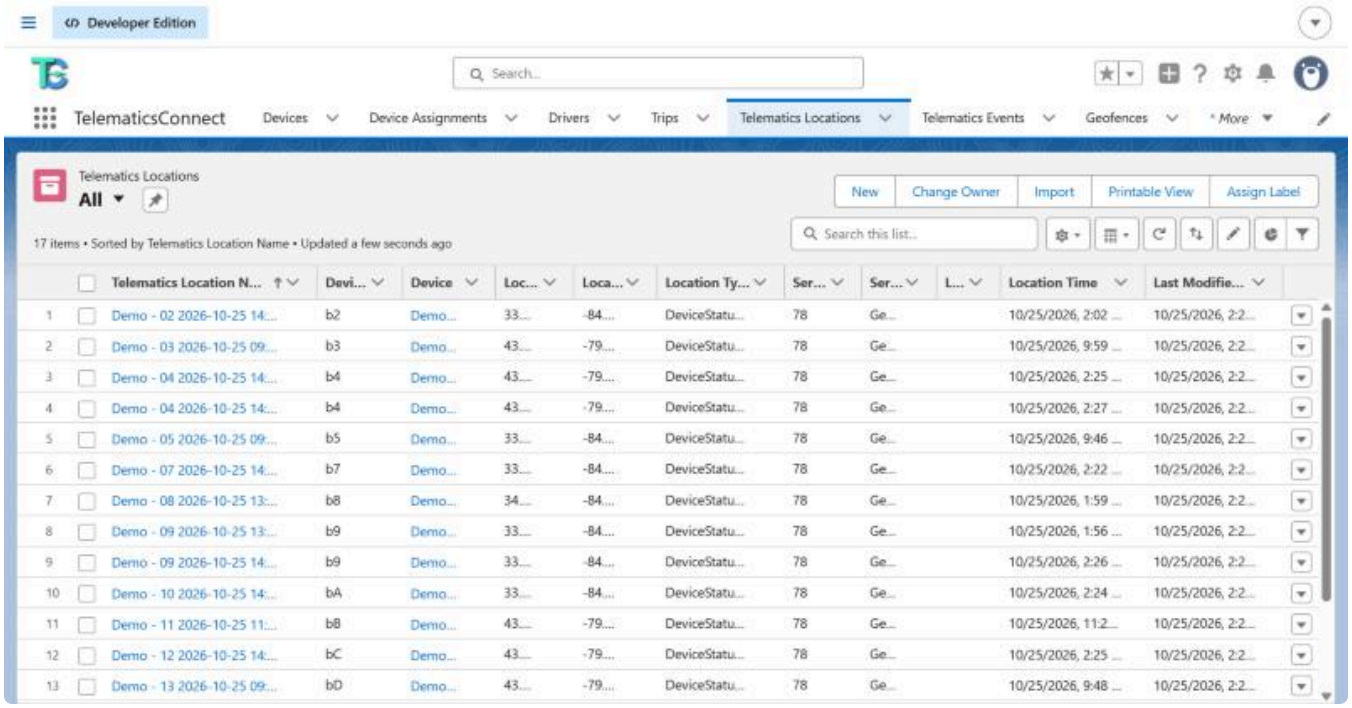


A7. Telematics Locations and Last Location

A **Telematics Location** is one recorded position: **Location Time**, **Location Latitude** and **Location Longitude**, **Speed**, **Location Address** and **Location Type**. How often positions arrive depends on how your account was set up with GPS Dashboard.

Each Device has one **Last Telematics Location**. It's created with the Device and moves forward whenever a newer location or event arrives. The **Last Locations Map** (A10) reads it.

Locations are the largest data set in TelematicsConnect. The TelematicsConnect App settings name which Location Types to delete and after how many days (B5). A scheduled clean-up job does the deleting; see B8.



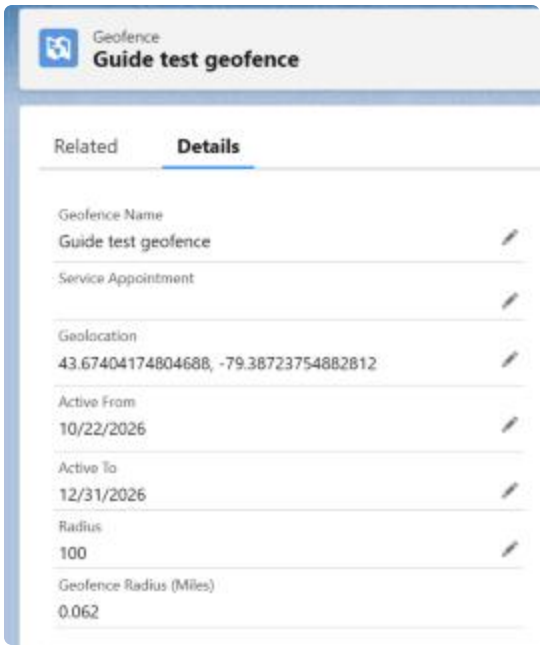
A8. Geofences

A **Geofence** is a circle around a place you care about, such as a customer site or a depot. When a trip stops inside one, TelematicsConnect links the trip to it, so you can see and report on visits.

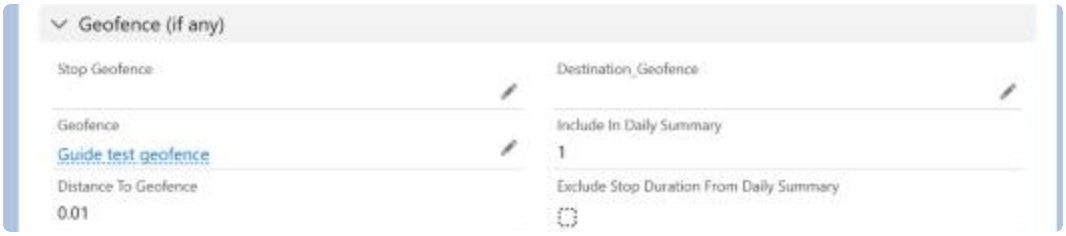
Tip: geofences for your customer locations. To connect your telematics data to your business processes, create geofences for the places your teams visit, such as customer accounts, work order sites or job addresses. Every visit is then recorded against that place, so you can track and confirm customer touch points. You don't need to create them by hand: a simple record-triggered Flow can create a geofence whenever a Salesforce record with an address is created, such as an Account or a Work Order. The Flow copies the name and the address (with **Geocode Address** checked) or the latitude and longitude, and sets the Radius and the Active From and Active To dates.

Fields you set

Field	Meaning
Geofence Name	The place's name
Geolocation	The center (latitude and longitude)
Radius	The circle's radius in meters. Blank = the default search radius (B5)
Active From, Active To	The geofence is used only while **today** is after Active From and before Active To
Account	Optional: the customer account it belongs to
Street, City, State / Province, Zip Code / Postal Code, Country, Geocode Address	The address, and whether to look up its Geolocation from it (see below)
Geofence Trip Totals	Check to keep running totals of the trips that stop here



How a trip is matched. When geofence matching is on (B6), each new trip, and each trip whose stop location changes, is checked against the three active geofences nearest its stop. The trip is linked to the nearest one whose circle contains the stop. Its **Geofence** field is then set, and **Distance To Geofence** shows how far from the center it stopped.



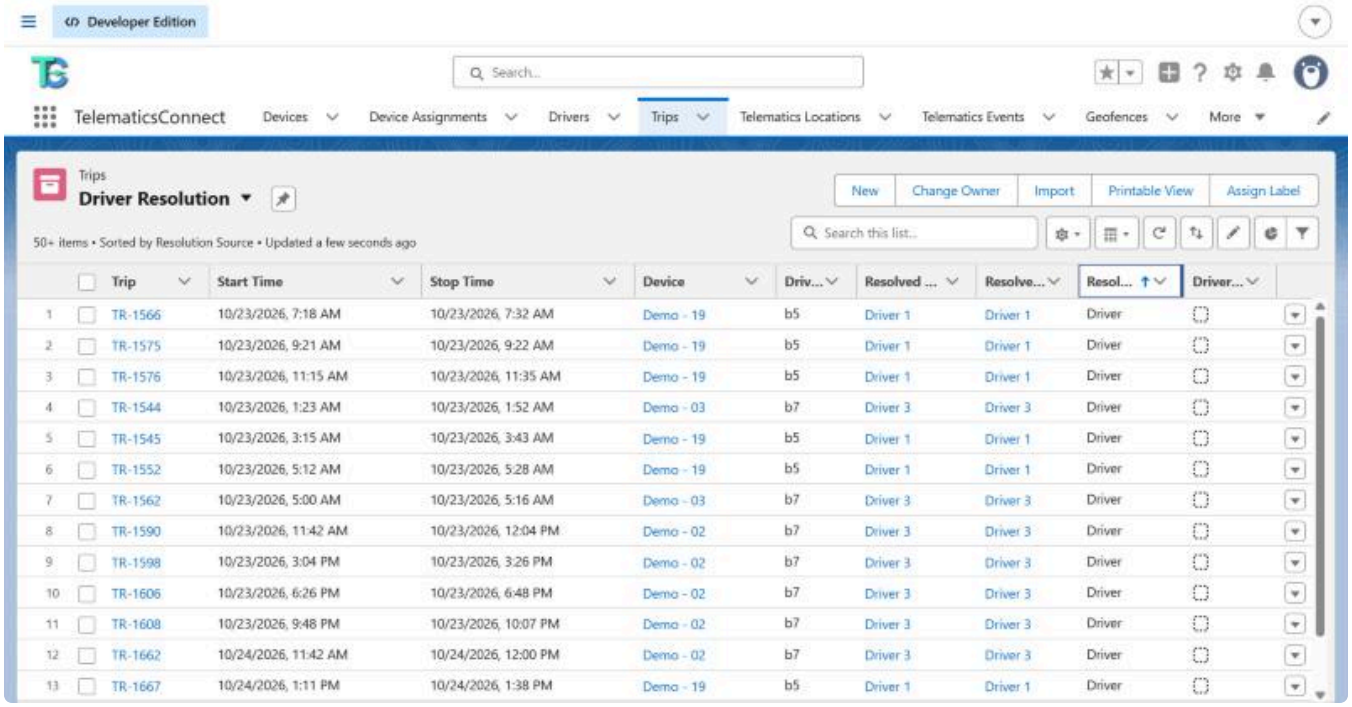
Totals. With **Geofence Trip Totals** checked, the geofence shows **Total Trip Count**, **Total Driving Duration (Hrs)**, **Total Idling Duration (Hrs)**, **Total Stop Durations (Hrs)** and **Total Travel Distance Miles** for the trips linked to it.

Geocoding an address. With **Enable Geocode Service** on (B5), check **Geocode Address** and fill in the address fields. When you save, TelematicsConnect asks Google Maps for the location and fills in **Geolocation**. The **Google Geocode** fields show how good the match was.

A9. Who drove a trip

TelematicsConnect decides who drove each Trip, Telematics Event and Exception Event **once, when it arrives**, and writes the answer on the record.

Field	Meaning
Resolved User	The Salesforce user who drove
Resolved Driver	The Driver record used, when the answer came from a driver ID
Resolution Source	**Driver**, **Device Assignment** or **Unassigned**: how the answer was found
Driver Not Mapped	Checked when the record has a driver ID that isn't linked to a user yet



	Trip	Start Time	Stop Time	Device	Driv...	Resolved ...	Resolve...	Resol...	Driver...
1	TR-1566	10/23/2026, 7:18 AM	10/23/2026, 7:32 AM	Demo - 19	b5	Driver 1	Driver 1	Driver	
2	TR-1575	10/23/2026, 9:21 AM	10/23/2026, 9:22 AM	Demo - 19	b5	Driver 1	Driver 1	Driver	
3	TR-1576	10/23/2026, 11:15 AM	10/23/2026, 11:35 AM	Demo - 19	b5	Driver 1	Driver 1	Driver	
4	TR-1544	10/23/2026, 1:23 AM	10/23/2026, 1:52 AM	Demo - 03	b7	Driver 3	Driver 3	Driver	
5	TR-1545	10/23/2026, 3:15 AM	10/23/2026, 3:43 AM	Demo - 19	b5	Driver 1	Driver 1	Driver	
6	TR-1552	10/23/2026, 5:12 AM	10/23/2026, 5:28 AM	Demo - 19	b5	Driver 1	Driver 1	Driver	
7	TR-1562	10/23/2026, 5:00 AM	10/23/2026, 5:16 AM	Demo - 03	b7	Driver 3	Driver 3	Driver	
8	TR-1590	10/23/2026, 11:42 AM	10/23/2026, 12:04 PM	Demo - 02	b7	Driver 3	Driver 3	Driver	
9	TR-1598	10/23/2026, 3:04 PM	10/23/2026, 3:26 PM	Demo - 02	b7	Driver 3	Driver 3	Driver	
10	TR-1606	10/23/2026, 6:26 PM	10/23/2026, 6:48 PM	Demo - 02	b7	Driver 3	Driver 3	Driver	
11	TR-1608	10/23/2026, 9:48 PM	10/23/2026, 10:07 PM	Demo - 02	b7	Driver 3	Driver 3	Driver	
12	TR-1662	10/24/2026, 11:42 AM	10/24/2026, 12:00 PM	Demo - 02	b7	Driver 3	Driver 3	Driver	
13	TR-1667	10/24/2026, 1:11 PM	10/24/2026, 1:38 PM	Demo - 19	b5	Driver 1	Driver 1	Driver	

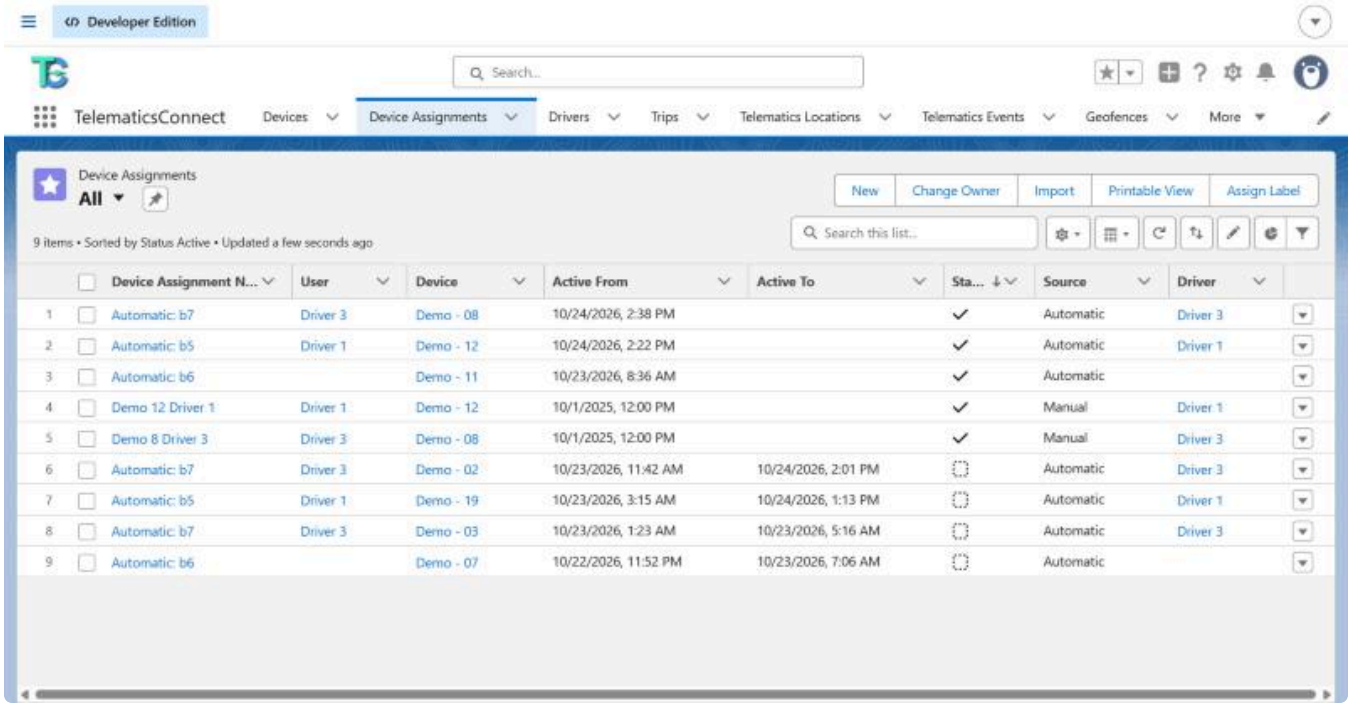
How the answer is found, in this order:

1. **The record has a driver ID** (a driver logged in, or your provider assigns drivers to vehicles), and that ID has a **Driver** linked to a **User** → that user. Source: **Driver**.
2. **The record has a driver ID but no linked user** → **Unassigned**, with **Driver Not Mapped** checked. TelematicsConnect never guesses, so the trip is never credited to the wrong person.
3. **No driver ID** (`UnknownDriverId`) → the user of the vehicle's **manual Device Assignment** covering that time. Source: **Device Assignment**.
4. Otherwise → **Unassigned**.

A Driver can also have **Active From** and **Active To**; it only counts during that period.

Device Assignments. A Device Assignment links a vehicle to a user for a period. There are two kinds, kept separately:

- **Manual**: created by your admin for vehicles that are driven without a driver log-in, for example a van that belongs to one technician. Manual assignments for the same vehicle can't overlap.
- **Automatic**: created by TelematicsConnect from driver IDs on trips. Those IDs come from the driver assignment in your telematics provider's platform, by driver log-in or by a supervisor. It starts with a driver's first trip on a vehicle, and ends at that driver's last trip on it when another driver, or a trip with no driver, appears on that vehicle, or when the driver moves to another vehicle.



Automatic assignments never change manual ones, and are never used to fill in trips without a driver ID. Together they set each Device's **Current User** and **Current Driver** (A3).

New driver IDs. When a trip arrives with a driver ID that TelematicsConnect hasn't seen before, it creates a **Driver** with just that ID and no user, so your admin can link the user. Until then, that driver's records are Driver Not Mapped.

Finding the gaps. Use the **Driver Not Mapped** and **Unassigned** list views on Trips, Telematics Events and Exception Events, the **Drivers without a User** list view on Drivers, and the **Driver IDs Not Mapped** and **Unassigned Unknown-Driver Trips** reports. Records that arrived before their driver or assignment was set up stay as they are; fix the setup and new records are resolved correctly.

Image — The Driver Not Mapped list view: driver ID b6 has no linked user yet

A10. Maps

TelematicsConnect's maps use Google Maps. The map key comes with TelematicsConnect; you don't need your own.

Tab	What it shows	How to use it
Trips Map	Trips drawn on the map	Choose **Select Devices** or **Select Users** (a vehicle's Current User), pick one or more, set **From Date** and **To Date**, then click **Display Map**
Last Locations Map	Where each vehicle was last seen	Choose devices or users, then **Display Map**
Reports Map View	The records of one or more reports as map markers	**Select Folder**, pick the **Report(s)**, then **Run**. The report needs latitude and longitude columns (B5)
Report Map View With Search	The same, with a search box on the map	As above

Image — Trips Map: one vehicle's trips over three days

Image — Last Locations Map: where each vehicle was last seen

The **Last Location Map** link on a Device opens the map for that one vehicle. **Hide Selection** folds the choices away to give the map more room.

A11. Reports, dashboards and list views

The reports are in the **Telematics App** report folder and the dashboards in the **Telematics App** dashboard folder. Save a copy before changing one, so a package upgrade doesn't overwrite your changes.

Report	What it answers
Trip Details: This Week	This week's trips with their details
Trip Details: Add Filters Device & Date	Trips for a vehicle and dates you choose

Report	What it answers
Trips with Device	Trips grouped by vehicle
Trips with Stops @ Geofence	Trips that stopped inside a geofence
Trips with Stops NOT @ Geofence	Trips that stopped outside every geofence
Geofence Visits by Month	Visits to each geofence per month
Fleet Utilization with Driving Durations	Driving and idling time per vehicle
Fleet Utilization with Milage	Distance per vehicle
Fleet Utilization with Stop Durations	Stop time per vehicle
Device Daily Summary, Device Daily Summary - LAST WK, Device Daily Summary - Utilization	Daily totals per vehicle (needs the summary job, B8)
Payroll Validation Report	Daily first start and last stop per vehicle, to check hours
Telematics Events with Device Report	Telematics Events by vehicle, for example fill-ups
Exceptions by Rule and Vehicle	Which exception rules are broken most, and by which vehicles (A6)
Exceptions by Vehicle and Rule	Each vehicle's mix of exception rules, as a stacked bar (A6)
Driver IDs Not Mapped	Driver IDs that still need a Driver or a User (A9)
Unassigned Unknown-Driver Trips	Trips with no driver ID and no manual Device Assignment (A9)

The **Fleet Utilization** dashboard shows fleet mileage, driving and idling durations, and stop durations. The **Fleet Exceptions** dashboard shows exceptions per vehicle, stacked by rule, and which rules are broken most.

Image — The Fleet Utilization dashboard

Image — The Fleet Exceptions dashboard: exceptions per vehicle stacked by rule, and whi…

List views worth knowing: **Current Use** (Devices), **Driver Resolution**, **Driver Not Mapped** and **Unassigned** (Trips, Telematics Events, Exception Events), **Drivers without a User** (Drivers), and **Manual Assignments** and **Automatic Assignments** (Device Assignments).

A12. Troubleshooting

What you see	Likely cause	What to do
No new trips, events or devices	The connection to GPS Dashboard or your provider has stopped, or your org's data storage is full	Ask your admin to check B3 and B4 and your org's storage; contact GPS Dashboard support
A trip's Resolution Source is **Unassigned** and **Driver Not Mapped** is checked	Its driver ID has no Driver, or the Driver has no User	Admin links the Driver to a User (B7). Trips that already arrived stay Unassigned
A trip with no driver ID is **Unassigned**	The vehicle has no manual Device Assignment covering that time	Admin adds a manual Device Assignment (B7)
A Device's Current User is blank	Its latest trip had no driver and it has no manual assignment, or the driver isn't linked to a user	As the two rows above
A trip stopped at a site but has no Geofence	Geofence matching is off; the geofence isn't active today; the stop is outside its radius; or the geofence was added after the trip arrived	Check B6, the geofence's Active From and Active To, and its Radius. Earlier trips aren't matched again unless their stop location changes
Geocode Address doesn't fill the Geolocation	Enable Geocode Service is off, or Google couldn't find the address	Check B5, and the geofence's Google Geocode Status

What you see	Likely cause	What to do
A map is empty	No devices or users chosen, or none with locations in the dates chosen	Choose devices or users and dates, then Display Map
Reports Map View shows nothing	The report has no latitude and longitude columns	Add them to the report (B5)
A Device you deleted came back	Your provider still has it	Remove or deactivate it in your provider's system
A Device Assignment won't save: *… can't overlap*	Another manual assignment for that vehicle covers the same time	Set Active To on the earlier assignment first, as the message suggests

A13. Known limitations

- **Who drove is decided once**, when a record arrives. Records that arrived before their Driver, User or manual Device Assignment was set up stay as they are.
- **Geofences are matched once**, when a trip arrives or its stop location changes, and only against geofences active **today**. A geofence added later doesn't update earlier trips.
- **Full data storage.** When your org's data storage is full, incoming telematics data is skipped and GPS Dashboard is notified.
- **Devices follow your provider.** Changes made to Device fields in Salesforce are overwritten by the next update from your provider.
- **Driver IDs** are matched on the ID alone. If two of your provider accounts use the same driver ID, they're treated as one Driver.
- **Current User and Current Driver can be out of date.** They're refreshed only when trips arrive or a manual assignment changes, not as time passes. If a manual assignment ends while the vehicle is parked, the Device keeps showing that user until its next trip. A driver who isn't linked to a user yet doesn't show as Current Driver.

Part B: Admin Setup

B1. Prerequisites and install

Install in a sandbox first, run the checks in B9, then repeat in production.

Prerequisites

- [ ] A GPS Dashboard account for TelematicsConnect
- [ ] Your telematics provider's account details at hand (for Geotab: database name, user name and password of a user who can see all vehicles)
- [ ] System Administrator access to the Salesforce org
- [ ] Enough free data storage for your fleet's trips, events and locations

Install

- [ ] Install TelematicsConnect from the AppExchange link GPS Dashboard sends you
- [ ] Choose **Install for Admins Only**, then give other users access with permission sets (B2)
- [ ] Check Setup → Installed Packages shows **TelematicsConnect** with version 1.388 or later

The install fills in the TelematicsConnect App settings with working values (B5). If you also use field service, install TelematicsConnect first, then TC Extension for Field Service.

Image — Installed Packages showing TelematicsConnect

B2. Permission sets, page layouts, tabs and the app

Permission sets

Permission set	Gives
TC Admin	Full access to everything in the TelematicsConnect app: its objects and tabs, the maps, the setup pages and the Log Trip records. Connecting a provider account (B4) also needs a System Administrator

Permission set	Gives
TC User	Read access to the same objects, tabs and maps, and can create and edit Geofences

- [ ] Assign **TC Admin** to the people who set up Drivers and Device Assignments
- [ ] Assign **TC User** to dispatchers and fleet managers

Image — The TC Admin and TC User permission sets

People who are only **Resolved User** on a trip, for example technicians, need no TelematicsConnect access at all. Being linked to a vehicle never changes the vehicle's owner.

The app. The **TelematicsConnect** app holds the tabs: Devices, Device Assignments, Drivers, Trips, Telematics Locations, Telematics Events, Geofences, Exception Events, Reports, Dashboards, Trips Map, Last Locations Map, Last Telematics Locations, Telematics Daily Summaries, Vehicle Specifications, Reports Map View, Report Map View With Search, TelematicsConnect Setup and Service Providers Management.

Page layouts. Each object comes with a layout. The **Trip** record page groups the fields into Trip Start & Stop Summary, Trip Identifiers, Durations & Distance, Geofence (if any) and Driver resolution. Add the who-drove fields to your own layouts if you use different ones.

B3. Authorize TelematicsConnect

GPS Dashboard needs your permission to send data into your org. You give it once, as an admin.

- [ ] Open the **TelematicsConnect Setup** tab
- [ ] Click **Authenticate**. A Salesforce sign-in window opens
- [ ] Sign in as an admin and allow access. A message confirms TelematicsConnect is authorized

Image — The TelematicsConnect Setup tab with the Authenticate link

If you've authorized before, the message says so. You can revoke the access at any time in Setup (Connected Apps OAuth Usage); data stops arriving until you authorize again.

B4. Connect your telematics provider

Add your provider account so GPS Dashboard can read your vehicles' data. The account details are sent to GPS Dashboard's Connect Platform, which uses them to read from your provider; they aren't stored in your Salesforce org.

- [ ] Open the **Service Providers Management** tab. **Existing Accounts** lists the accounts already connected
- [ ] Click **Add Service Provider** and choose your provider
- [ ] Fill in the fields the provider needs (for Geotab: database, user name, password) and a **Description**
- [ ] Click **Validate Credentials** and wait for the success message
- [ ] Click **Save**

Image — Add Service Providers: choose the provider, then fill in its fields

To change an account, use **Update Existing Account**; to remove it, **Delete Account**. After saving, GPS Dashboard sets up the data feed. Devices arrive first, then trips, events and locations.

B5. TelematicsConnect App settings

Setup → Custom Settings → **TelematicsConnect App** → Manage → Edit the **Default Organization Level Value**. The install fills in the values in the "After install" column.

Setting	After install	What it does
Enable Geofence Calculation on force.com	On	Matches trips to Salesforce geofences (A8). **Turn off** if TC Extension for Field Service is installed (B6)
Relate Trip to Geofence Event	Off	Leave off - not used in this version

Setting	After install	What it does
SearchRadiusInMiles	0.11	Search radius used for geofences with no Radius
Unit	mi	Distance unit for geofence matching**. Leave as mi: geofence radii are compared in miles**
Enable Geocode Service	On	Looks up a geofence's location from its address when Geocode Address is checked
Don't Create Drivers from Trips	Off	Off: a new driver ID on a trip creates a Driver with no User, for you to link. On: create Drivers by hand only
Telematics Location Days to Delete	30	Age in days after which the clean-up job deletes Telematics Locations (B8), counted from when each was created. 0 deletes everything created before today. Don't leave it blank, or the job fails
Telematics Type To Delete	logRecord,StatusData	Location Types the clean-up job deletes; comma-separated, no spaces. Check the Location Type column of your Telematics Locations (for example DeviceStatusInfo) and list the types you want deleted
DailySummary_MinDistance	blank	Trips with no stop that are shorter than this many miles are left out of daily summaries
Convert Km/hr to MPH	0.62137119	Speed conversion
Convert Km to Miles	0.621364	Distance conversion
Convert Meters To Miles	0.000621364	Geofence radius conversion

Setting	After install	What it does
Enable Trip Log	Off	Keeps a copy of each incoming trip, for troubleshooting with GPS Dashboard support. Leave off
API_RemoteSite, API RemoteSite Domain	Set by the install	Addresses of GPS Dashboard's service. Don't change
Google Maps API	Set by the install	Not used in this version

Image — TelematicsConnect App settings (Edit)

Reports Map Columns (Setup → Custom Settings → Reports Map Columns → Manage): list the API names of the latitude and longitude columns your reports use, separated by semicolons. Reports Map View (A10) places markers from those columns.

- [ ] Review each setting against this table
- [ ] **Check Unit is mi**
- [ ] Turn off **Enable Geofence Calculation on force.com** if TC Extension for Field Service is installed

B6. Geofence matching and geocoding

Choose who matches trips to geofences. Only one part of your setup should do it:

You use	Enable Geofence Calculation on force.com	Relate Trip to Geofence Event
TelematicsConnect only	**On**	Off
TelematicsConnect with TC Extension for Field Service	**Off**: the extension matches trips to Service Appointment geofences itself	Off

The install turns geofence calculation **on**, so with TC Extension for Field Service you must turn it off after installing.

- [ ] Set **Enable Geofence Calculation on force.com** as in the table (B5)
- [ ] Leave **Relate Trip to Geofence Event** off

Geofences. Create them on the Geofences tab (A8). Give each a Geolocation (or an address with Geocode Address checked), a Radius in meters, and Active From and Active To dates that include today.

Totals on accounts. Geofences with **Geofence Trip Totals** keep totals of their trips. TelematicsConnect can also copy those totals to a parent record, such as the geofence's Account. Which object and fields receive them is set in the **TelematicsConnect Geofence Setup** custom metadata (Setup → Custom Metadata Types); ask GPS Dashboard support before changing it.

Geocoding. Address lookup uses a Google geocoding key that comes with TelematicsConnect; you don't need your own. If **Geocode Address** never fills a geofence's Geolocation, check that **Enable Geocode Service** is on (B5) and look at the geofence's **Google Geocode Status**.

B7. Who drove: Drivers and Device Assignments

TelematicsConnect decides who drove each record once, when it arrives (A9). Set up Drivers and manual Device Assignments **before go-live**: records that arrive first stay Unassigned.

If your drivers log in, or your provider assigns drivers to vehicles

- [ ] Get the list of driver IDs from your provider
- [ ] On the **Drivers** tab, create a Driver for each: **Driver External ID** = the provider's driver ID (for example b3), **User** = the Salesforce user who is that driver. Leave Active From and Active To blank unless the link should end
- [ ] Or let TelematicsConnect create them: each new driver ID on a trip creates a Driver with no User (unless **Don't Create Drivers from Trips** is on). Then open the **Drivers without a User** list view and fill in **User**

Image — A Driver: Driver External ID and User

Image — The Drivers tab: each driver ID with its User

If vehicles are driven without a driver ID

- [ ] On the **Device Assignments** tab, click **New** and create a **manual** assignment for each vehicle: **Device**, **User**, **Active From**, and **Active To** if the period ends
- [ ] To hand a vehicle to someone else, first set **Active To** on the current assignment, then create the new one. Manual assignments for the same vehicle can't overlap

After go-live, for the first few days

- [ ] Check the **Driver IDs Not Mapped** report and the **Drivers without a User** list view, and link the missing users
- [ ] Check the **Unassigned Unknown-Driver Trips** report, and add manual assignments for those vehicles

The users you link need no TelematicsConnect license or access, and linking them never changes a Device's owner. Automatic assignments appear by themselves; don't edit them.

B8. Data retention and scheduled jobs

TelematicsConnect keeps everything it receives until it's deleted. Plan for your org's data storage: Telematics Locations grow fastest, then Trips and Telematics Events.

Job	What it does	Can you schedule it?
Tracking Device Summary Job (V2)	Builds the Telematics Daily Summaries for the Daily Summary reports	**Yes**: Setup → Apex Classes → **Schedule Apex**, class **TrackingDeviceSummaryJobV2**, daily. Don't also schedule the older TrackingDeviceSummaryJob (without V2); it just runs V2
Clean Location Job	Deletes Telematics Locations older than **Telematics Location Days to Delete**, of the **Telematics Type To Delete** types (B5)	**Yes**: Setup → Apex Classes → **Schedule Apex**, class **CleanLocationJob**, daily. Set both settings first (B5)
Geofence Cumulative Total Job	Recalculates every geofence's trip totals	**Yes**, class **GeofenceCumulativeTotalJob**. Optional: totals already update as each trip is matched

- [ ] Schedule **TrackingDeviceSummaryJobV2** to run daily, if you use the Daily Summary reports
- [ ] Set **Telematics Location Days to Delete** and **Telematics Type To Delete** (B5), then schedule **CleanLocationJob** to run daily. Watch **Telematics Locations** in Setup → Storage Usage

If your org's data storage fills up, TelematicsConnect skips incoming data and GPS Dashboard is notified.

B9. Check it works

Run these checks in your sandbox after setup, then again in production.

- [ ] **Devices** shows your vehicles, with the right names
- [ ] **Trips** shows recent trips with start and stop times, distances and durations
- [ ] A trip by a driver with a linked User shows that **Resolved User**, Resolution Source **Driver**
- [ ] A trip with no driver ID on a vehicle with a manual assignment shows Resolution Source **Device Assignment**

- [ ] **Current Use** shows a Current User for vehicles in use
- [ ] **Geofence test**: pick a trip with a Stop Geolocation. Create a Geofence at the same latitude and longitude, with Active From before the trip date and Active To after today. Then edit the trip's Stop Geolocation latitude slightly (the fourth decimal place) and save. The trip's **Geofence** fills in. Undo your edit afterwards
- [ ] **Trips Map** and **Last Locations Map** show your vehicles
- [ ] The **Telematics App** reports run and return data

With TC Extension for Field Service installed, skip the geofence test: the extension matches trips to Service Appointments instead.

Appendix

What TelematicsConnect stores in Salesforce

Data	Where	Kept
Vehicles	Devices, Vehicle Specifications	While your provider has them
Trips	Trips	Until deleted
Events and exceptions	Telematics Events, Exception Events, Exception Rules	Until deleted
Positions	Telematics Locations, Last Telematics Locations	Until deleted (B8)
Daily totals	Telematics Daily Summaries	Until deleted
Who drove	Drivers (driver ID and the linked User), Device Assignments, and the Resolved User on records	Until deleted
Geofences	Geofences	Until deleted
Connection	The access token for GPS Dashboard's service, in the TelematicsConnect API Token record	While connected

Your provider account details (B4) are held by GPS Dashboard's Connect Platform, not in your org. Driver records hold the driver ID and the User you link; add personal details only if your organization wants them.