Fleet365 – Dynamics 365 User Guide

Fleet365 support: support@fleet365.net
Contact Us: contactus@fleet365.net
Contents

I. Introduction ............................................................................................................................................... 2
   Geotab .................................................................................................................................................... 2
   Fleet 365 ................................................................................................................................................ 2
   Objectives ............................................................................................................................................... 2

II. Before you begin ...................................................................................................................................... 3
   Requirements ........................................................................................................................................... 3
   References .............................................................................................................................................. 3
   Geotab data in Fleet365 ............................................................................................................................ 3

III. Fleet 365 Provisioning ......................................................................................................................... 4
   Installing the Add-In................................................................................................................................. 4
   JSON Code for the Add-In....................................................................................................................... 5
   Setting up the MyGeotab Service Account to be used by Fleet365 ......................................................... 6
   Configuring Fleet365 integration ............................................................................................................ 8
Introduction

Fleet365 is web-based integration service that brings Geotab fleet telematics right into Microsoft Azure Cloud and Dynamics 365.

This document describes the functionality and usage of Fleet365 integration process.

Geotab
Geotab is a global leader in telematics, providing open platform fleet management solutions to businesses of all sizes. Geotab’s intuitive, full-featured solutions help businesses better manage their drivers and vehicles by extracting accurate and actionable intelligence from real-time and historical trips data. Many Fortune 500 companies rely on Geotab’s technology to provide measurable management data.

Easy Plug-&-Play Installation. It all starts in the vehicle. The Geotab GO7 is a small form-factor vehicle tracking device that simply plugs directly into your vehicle’s OBDII port. If your vehicle or truck does not have an OBDII, an adapter can be used instead. The installation process is quick, easy, and doesn’t require any special tools or the assistance of a professional installer.

Fleet 365
Fleet 365 is web-based integration service that brings Geotab fleet telematics right into Microsoft Azure Cloud and Dynamics 365.

Microsoft Azure is an open, flexible, enterprise-grade cloud computing platform. It’s a growing collection of integrated cloud services that developers and IT professionals use to build, deploy, and manage applications through a global network of datacenters. With Azure, you get the freedom to build and deploy wherever you want, using the tools, applications, and frameworks of your choice.

Objectives
This guide takes you step by step through the process of provisioning Fleet365 integration for Dynamics 365 and Geotab Fleet management systems
Before you begin

Fleet 365 Integration works with Geotab Fleet Management system and Dynamics 365 with Connected Field Services installed. We recommend that prior to signing up for Fleet365 Integration you have all the required subscriptions and environment setup.

Requirements

- Dynamics 365 Subscription
  - Connected Field Service App Installed
- Microsoft Azure Cloud Subscription
- Geotab Subscription and GO Vehicle Tracking Devices

References

You can refer to following resource links for further details on how to setup your environment prior to Fleet365 provisioning

- Dynamics 365 Trial
  - https://trials.dynamics.com/Dynamics365/Signup/sales
- Connected Field Service Solution
- Microsoft Azure Free Trial

Geotab data in Fleet365

The following data and events are pulled from MyGeotab:

- **Exception Events** - Nearing customer, customer arrivals, departures, long stops, hard braking, reversing when leaving, etc. Essentially any rule exceptions that are set up in MyGeotab.
- **Fault Events** - Engine overheating, DTCs, or other engine faults
- **Location Events** - Location updates from your vehicle
- **Status Events** - Engine status, diagnostics, etc.
- **Trip Data** - Vehicle history
Fleet 365 Provisioning

After making sure all required components and systems are in place, you are ready to go with Fleet365 Integration provisioning. The provisioning process is a set of workflow steps configured in a wizard based user interface. It is recommended not to close your browser window while the provisioning process is in progress. A progress notification on the screen shows the overall progress of the provisioning process.

Installing the Add-In

1. Log into MyGeotab and go to Administration > System… > System Settings and then click on the Add-Ins tab

2. Click the New Add-In button and paste the json code below into the window, replacing the sample code that is already there
JSON Code for the Add-In:

```json
{
   "name": "Fleet 365 SSO Provisioning",
   "solutionId": "fleet365SSO",
   "supportEmail": "support@fleet365.net",
   "version": "1.0",
   "items": [
      {
         "url": "https://app.fleet365.net/geotab/index",
         "path": "ActivityLink",
         "icon": "https://app.fleet365.net/content/img/icon.png",
         "menuName": {
            "en": "Fleet 365",
            "fr": "Fleet 365"
         }
      }
   ],
   "isSigned": false
}
```

3. Your window will look like the below. Press OK
4. Select the “Allow unsigned Add-Ins” box to On and click Save at the top of the page. Congratulations! The Add-In is installed and you are ready to set up the service!

5. Click the Fleet365 Add-In in the menu bar. The first time you set up the system you will be asked to create a user account that will be used as a service account by Fleet365 to pull the data from MyGeotab.
6. The system will automatically create a username, as indicated in the wizard, along with a strong password that meets the strictest MyGeotab policies.

7. You are now ready to make the actual connection between MyGeotab and the Azure IoT Hub. After clicking on the START FLEET365 INTEGRATION button you will be redirected to app.fleet365.
Configuring Fleet365 integration

8. Click **Sign Up** at the top navigation bar

9. Enter your organization name and click **SIGNUP**

10. Next you will be prompted to sign-in, please use your azure administrative credentials to login.

11. After signing in successfully, you’ll be prompted to click **Accept** to grant permissions to Fleet365
You'll then be navigated to the app.Fleet365.com main screen. Please verify you see your login user in the top right navigation bar.

Click Fleet Management to start the provisioning process.

This will open the Fleet365 provisioning screen at the Telemetry Output step. You will need to select the option where you want your Geotab Events to go to.

- If you want to receive telematics in Dynamics 365 Connected Field Services please select Azure Connected Field Services
- If you want to receive telematics in Azure IoT Hub, please select Azure IoT Hub

Depending upon your choice of Telemetry Output the steps in the work will change. For reference we are going to use Azure Connected Field Service here. Click CONTINUE.
15. Select your Azure subscription where **Connected Field Services** is installed and click **CONTINUE**.
16. Select your Azure Resource Group where **Azure Connected Field Services** is installed and click **CONTINUE**.

17. Next you will be asked to select which telematics events you want to receive in your destination output location. By default, all five types are events are selected. Please deselect events you don’t want to receive. For details about telematics events, please refer to the “Geotab data in Fleet365” section above. Click **CONTINUE**.
18. You are done! Click **LET THE MAGIC BEGIN** and let Fleet365 connect Geotab with Microsoft. Please note that the process could take several minutes to complete.

19. After the process has been completed you will be asked to enter your Geotab login and database information. For **Geotab Server URL** please use **my.geotab.com**. If you don’t know your database information please contact your administrator or ask your reseller. Please click **FINISH** to complete the provisioning process.
20. After your Geotab information is verified you will be redirected to the success screen.

21. After going through all of the steps described above your integration is ready to send telematics events to your selected destination (Azure IotHub or Connected Field Services). As part of this final step you need to register all of your Geotab Devices as Iot devices in your environment.
   a. Navigate to MyGeotab and go to Vehicles-> select a vehicle
   b. Copy Serial number of all each device that you want to receive telematics for. Please note this serial number is going to be used as Device ID when you are registering Iot Devices
   c. Connected Field Services users: follow the link to register Customer Assets: How to Register Devices in Connected Field Service
   d. Azure Iot Hub users: Use Device Explorer to register each devices in your Iothub environment: Device Explorer to Create and Register Iot devices