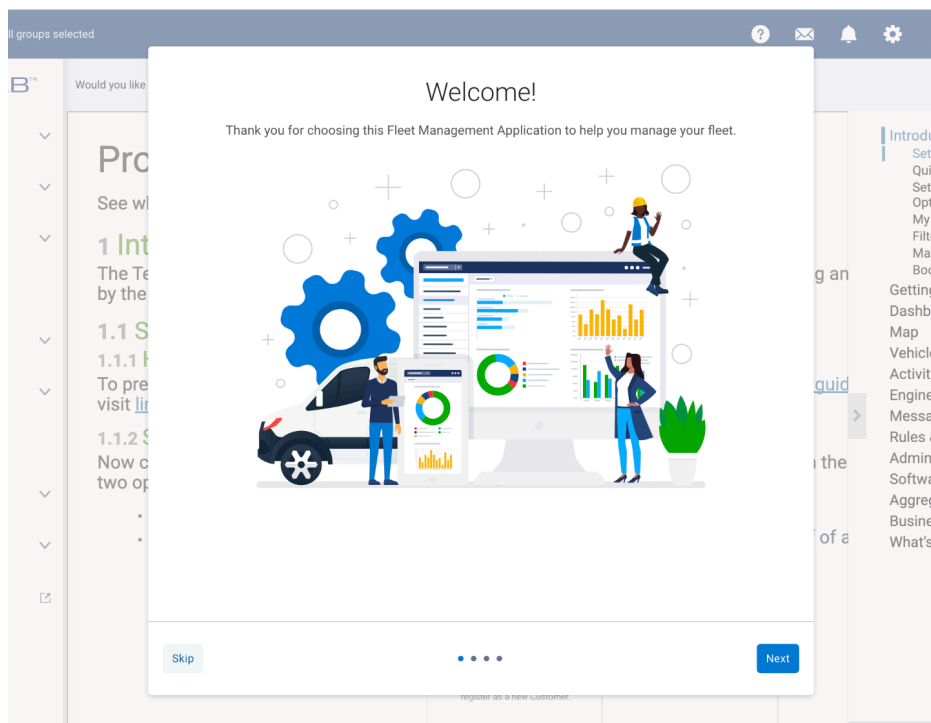


MyGeotab New User In-App Onboarding

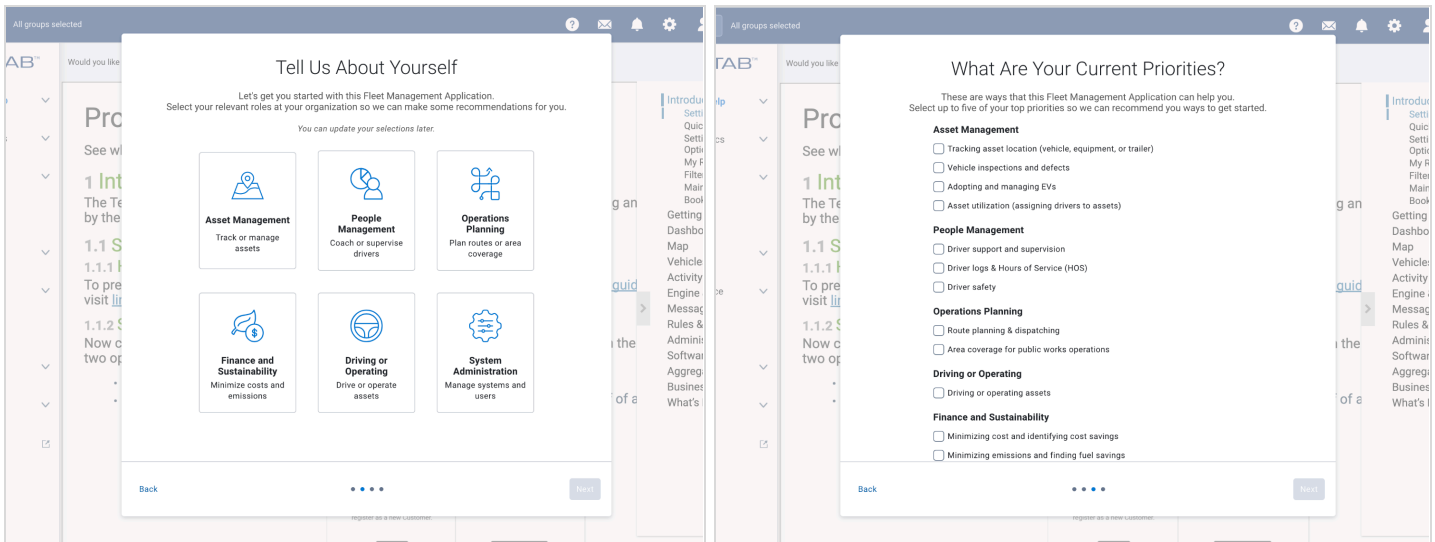
Introduction

MyGeotab offers a breadth and depth of functionality for a wide spectrum of fleet management use cases. We've taken a significant step to streamline the setup process and empower users to get the most out of our product from day one by creating a new user onboarding experience. The three facets of this new experience consist of system intelligence to learn about a user's job(s), automated configuration of default settings, and a dashboard preloaded with interactive charts based on the user's needs.

When new users sign up for our product, they are greeted with a new automated process to help them personalize their experience within MyGeotab.

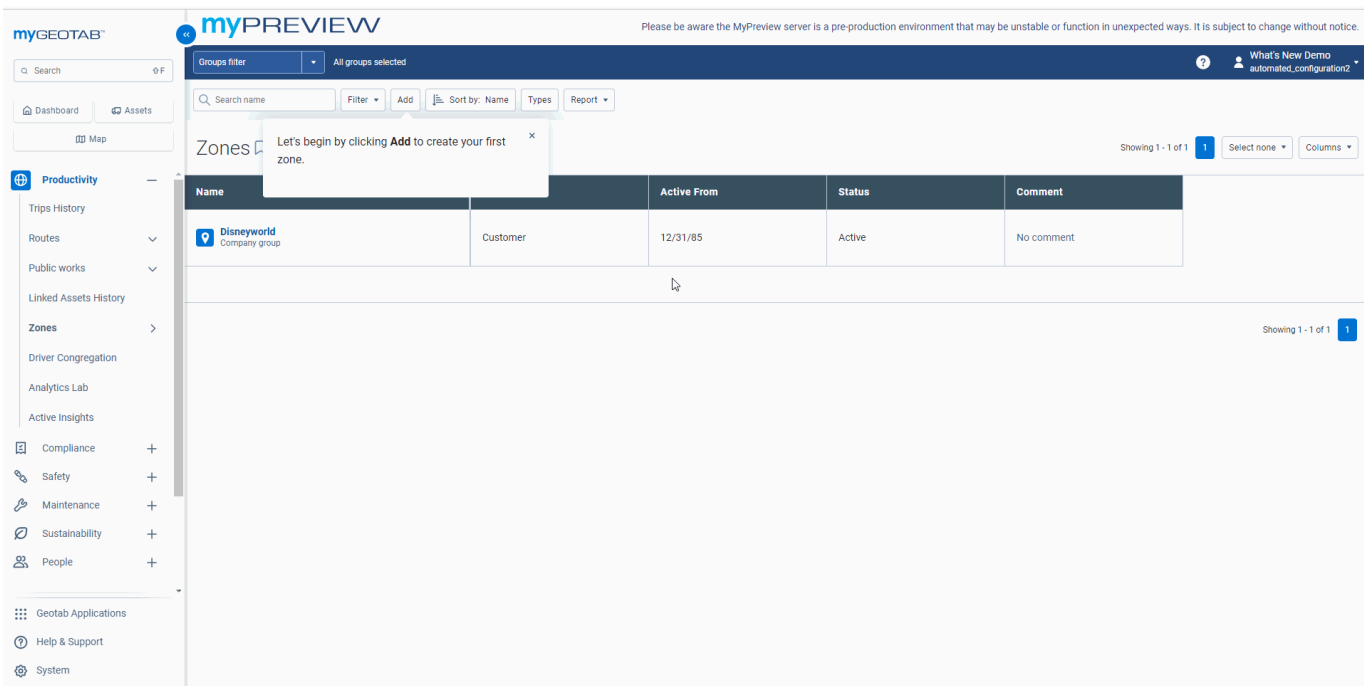
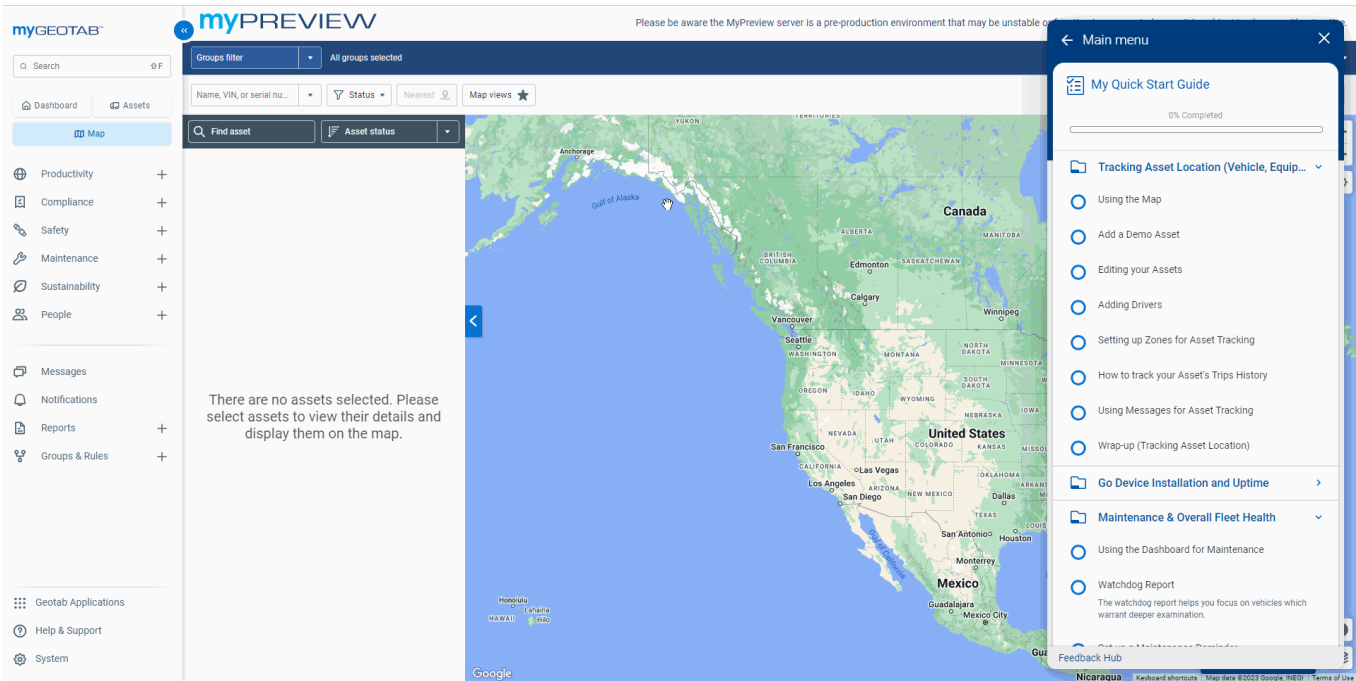


As part of this process, they are prompted to select the jobs they perform within their role. Based on this selection, MyGeotab intelligently determines the user's default landing page and curates a step-by-step guide tailored to their specific needs. Quick Start Guides assist with general discoverability of essential features and contain guided walkthroughs, links to tutorials, guides, and other resources to allow for deep dives to learn about all that MyGeotab has to offer.



For example, maintenance managers will receive guidance on setting up maintenance reminders to efficiently manage their assets, while system administrators will be guided through the process of setting up groups and establishing user permissions. With this personalized approach, users are empowered to hit the ground running, eliminating the uncertainty and confusion often associated with the initial setup. For a general overview of jobs and the subsequent automation that would take place when they are selected, see the [Automated Personalization Logic & Quick Start Guides](#).

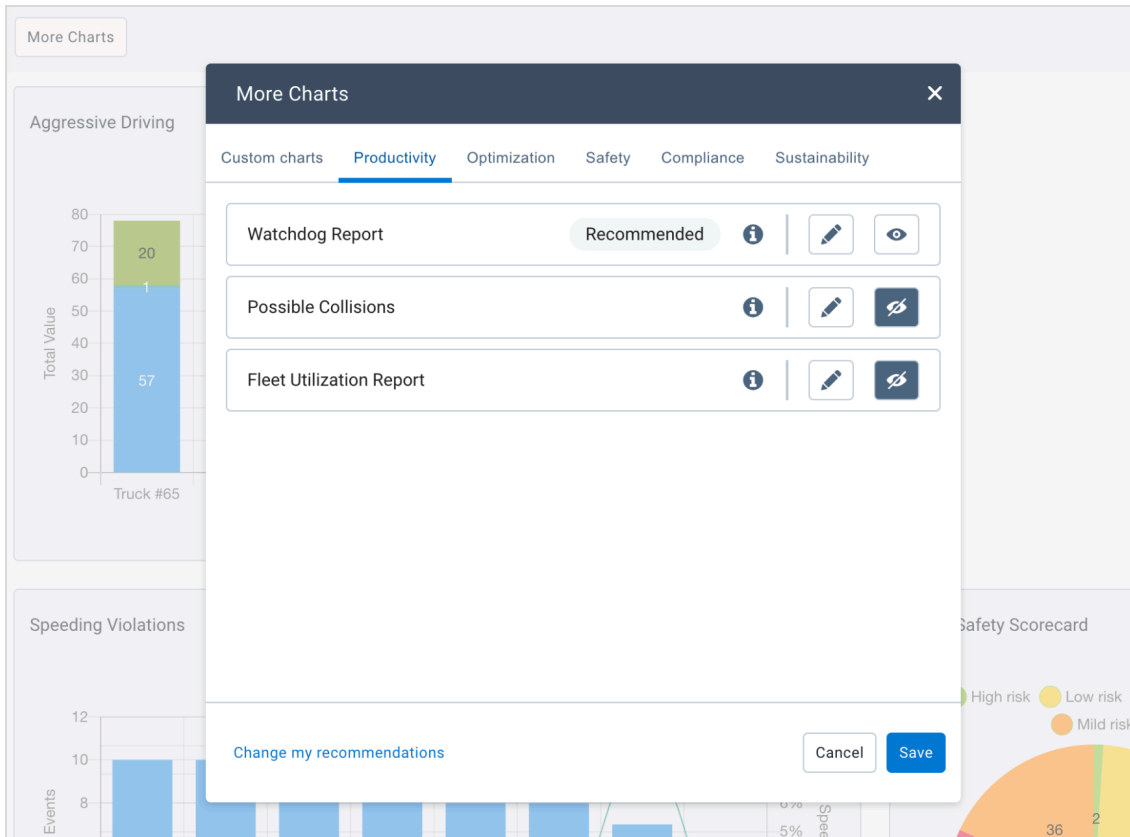
Quick Start Guide



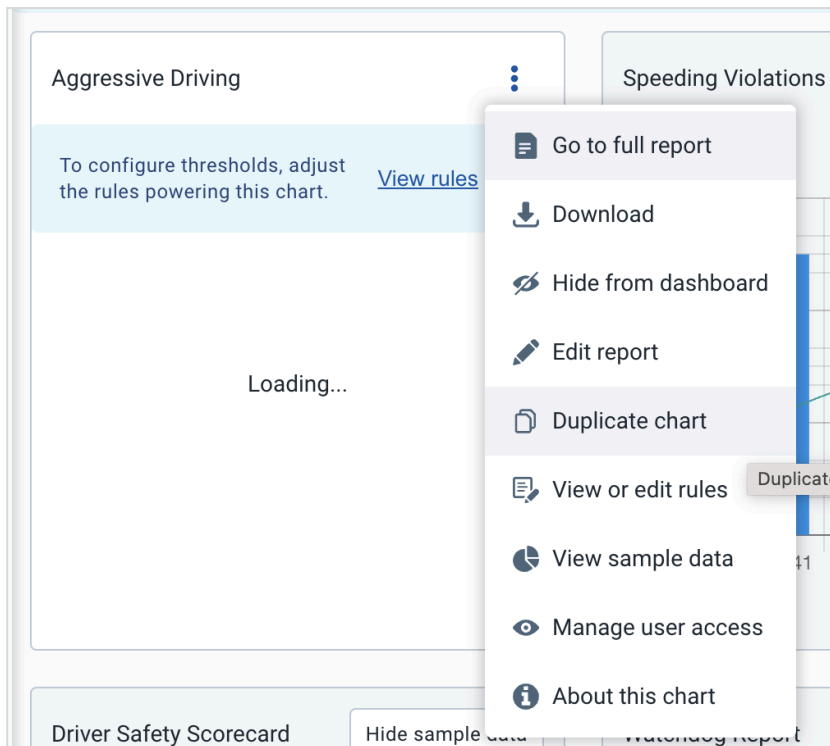
Interactive Charts

We understand the importance of data visualization in helping our users make informed decisions. To expedite this process, our system now proactively pre-loads meaningful interactive charts on their dashboard, showcasing essential

metrics and KPIs right from the start. If assets have not yet been added to the user’s database, these charts are provided with sample data. Once the user has access to data from their own assets, the charts automatically update to display real data. The new **More Charts** dropdown at the top left-hand corner of the dashboard allows users to discover other interactive charts, categorized based on type, that can be loaded with just one click.



These charts can be duplicated or edited easily using chart options menus. For example, if the user wants to monitor idling across three regions, they could create charts with those regional groups selected under **Belonging to** in the **Report Data Configuration** section.



Automated Configuration

Rules play a pivotal role in optimizing our product's capabilities. We have turned six rules on for all new databases by default. This automation significantly reduces the time spent on configuring rules manually and ensures that users benefit from the system's full potential without delay. These rules and their default settings are detailed below :

Rule	Default Condition
NEW! Collision detection (Active Insights)	ON
Hard acceleration	Passenger Car 0.43G
Harsh braking	Passenger Car -0.61G
Harsh cornering	Passenger Car 0.47G
Seat belt	ON
Speeding	20KM/Hr (converted to imperial) with Truck Speed Limit set to OFF

Where can I try this feature?

All users of newly registered databases will have the ability to experience this feature when logging in to MyGeotab for the first time. The in-app tutorials have been built for the [New Menu Redesign](#), which is being released in parallel.

Localization

Users in all languages will be able to select their job priorities once they log in. However, the Quick Start Guides will be launched in English, French, and Spanish for customers in North America. It will then be launched to all other supported languages with regional considerations in a subsequent weekly release.

How do I disable/opt out of this feature?

This feature can be turned off by deselecting **Automated Configuration** at database registration or when **Automated Personalization** is turned off under **System Settings** once the database has been created.

Import configuration:

<filename>.json

Selecting this option will trigger a questionnaire for new users to provide information about their role. The system will then serve them with a personalized Quick Start guide, pre-install relevant dashboard charts if applicable and perform other configuration, such as turning rules on.

Where can I get support for this feature?

Engineering Support can provide the necessary support for this feature.

Is there additional training or support documentation?

The onboarding experience is based on job priorities, starting with a pre-determined landing page which also triggers the relevant Quick Start Guide. There is no additional training or support documentation surrounding this.

API Considerations

- Role data will be available using our APIs

FAQ

- If you have gone through the process but want to try it again, you can remove yourself as a user of the database and log in again. You can also create a new user profile and log in using those credentials.

Resources and Contact Information

If you have any questions, please contact productfeedback+onboarding@geotab.com.

Stay connected



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