TC Extension for Field Service: User Guide

Oct 25, 2026 · @Amin

TC Extension for Field Service updates your Service Appointments from your vans' GPS. It records arrival and departure, totals time on site and driving time, and gives your customer a live ETA link. This guide covers version 1.1.0.6.

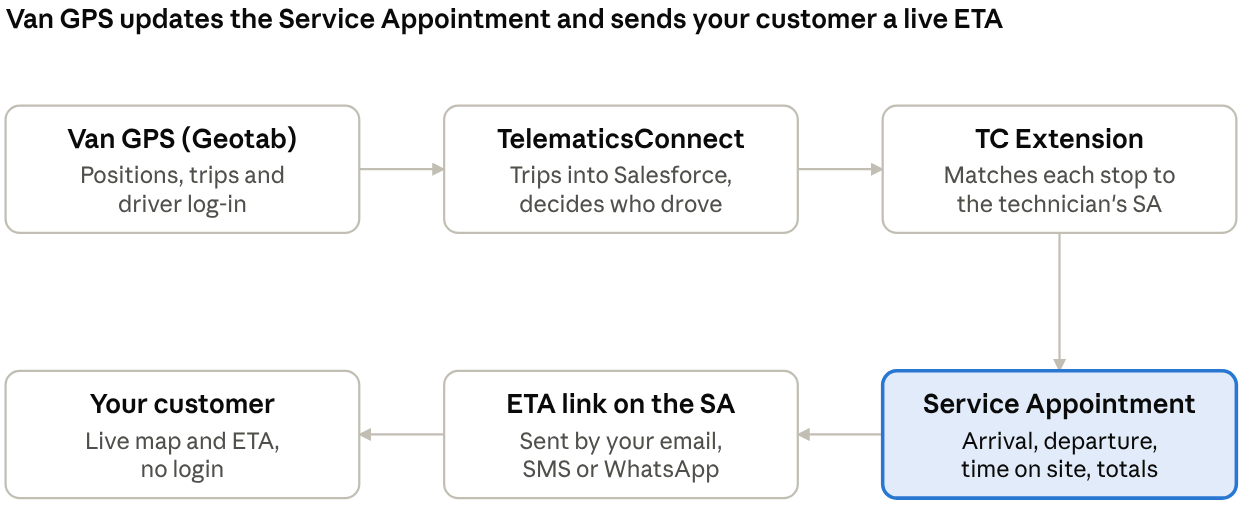
- **Part A: User Guide**, for dispatchers, planners and managers: what the extension does and how to read its results.
- **Part B: Admin Setup**, for your Salesforce admin: install, settings and checks, in order.

The extension needs Salesforce Field Service and TelematicsConnect (TC), which brings your telematics data (for example Geotab) into Salesforce.

Part A: User Guide

A1. What it does

The extension turns your vans' trips into actual times on each Service Appointment, and gives your customer a live ETA, with no input from the driver.



how it works · from van GPS to the SA and the customer

It all runs in your own Salesforce org. TelematicsConnect brings the trips in; the extension matches each stop to the right SA and writes the results.

A2. Key terms

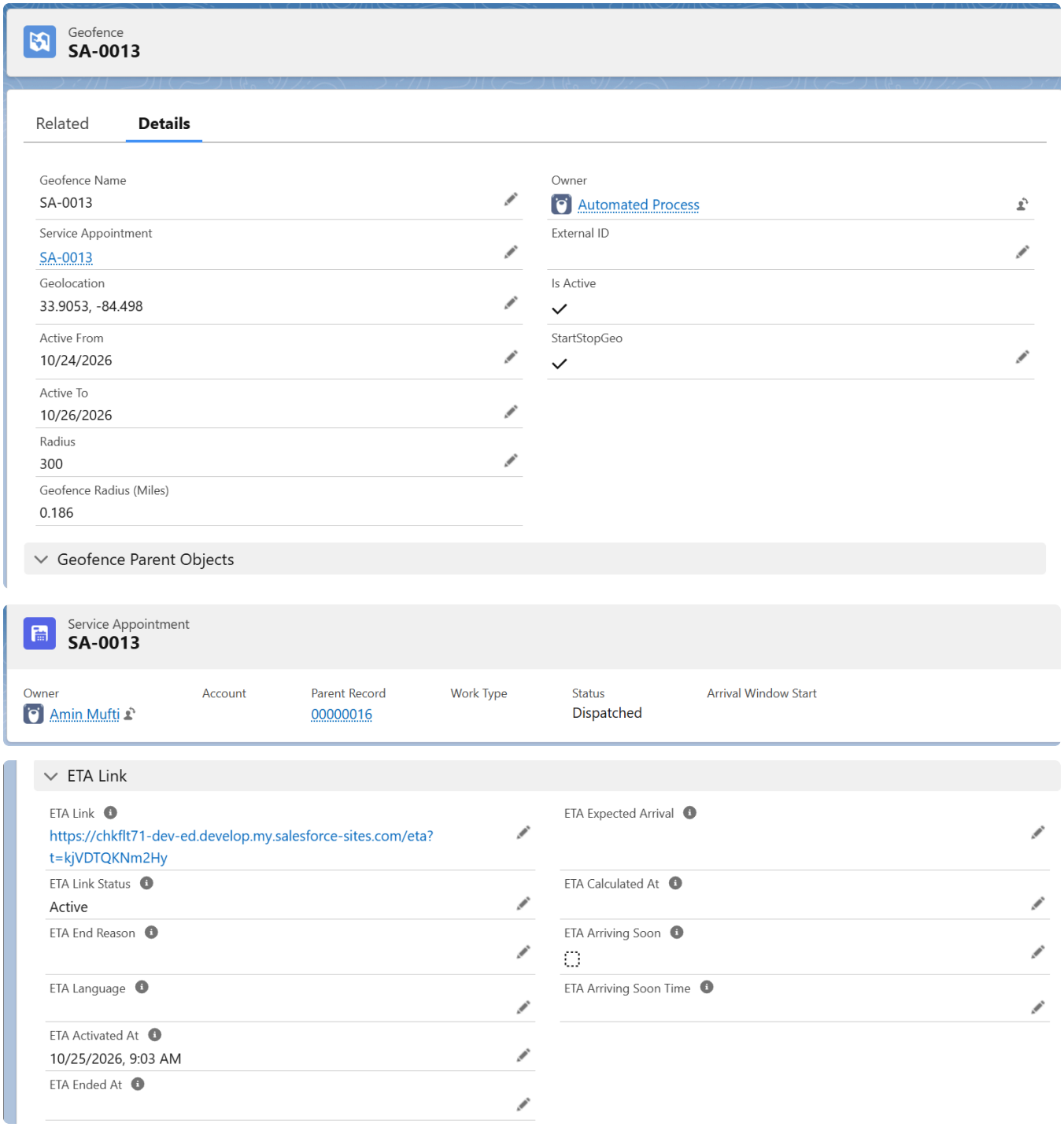
Term	Meaning
Service Appointment (SA)	A job in Field Service: pickup, delivery or visit at a customer address
TC Service Resource	The technician (driver) on the SA, as the extension reads it. Filled from your own technician field
Geofence	A circle around the SA address (300 m by default), created when the SA is dispatched
Trip	One drive of a van, from start to stop, sent by your telematics provider through TelematicsConnect
Resolved User	Who drove the trip, decided by TelematicsConnect from the driver log-in or the van's Device Assignment
Match	A trip whose stop is inside the geofence of an SA assigned to that trip's driver
Departed	The van has left the SA and driven beyond a minimum distance (0.5 miles by default)
ETA link	A web link for your customer showing the van on a map with a live arrival time

A3. A day in practice

Dispatchers only assign and dispatch as usual; everything after that happens by itself.

1. **Assign** the technician in your technician field. The extension copies it to TC Service Resource.
2. **Dispatch** the SA. A geofence is created around its address.
3. **The driver sets off** to the customer (for example the SA goes En Route). The ETA link is filled on the SA, and your messaging sends it to the customer.
4. **The van arrives** and stops inside the geofence. Within a few minutes the arrival time is written on the SA, and the ETA link ends.

5. **The van leaves.** The departure time and time on site are written, and Departed is ticked once the van is 0.5 miles away.
6. **Next job.** If your admin switched it on, the technician's next SA that day starts by itself, with a new ETA link.



A4. Reading the Service Appointment

The extension writes actual times and totals in the SA's **TelematicsConnect Actuals** section, and the customer link in **ETA Link**. All are read-only for users.

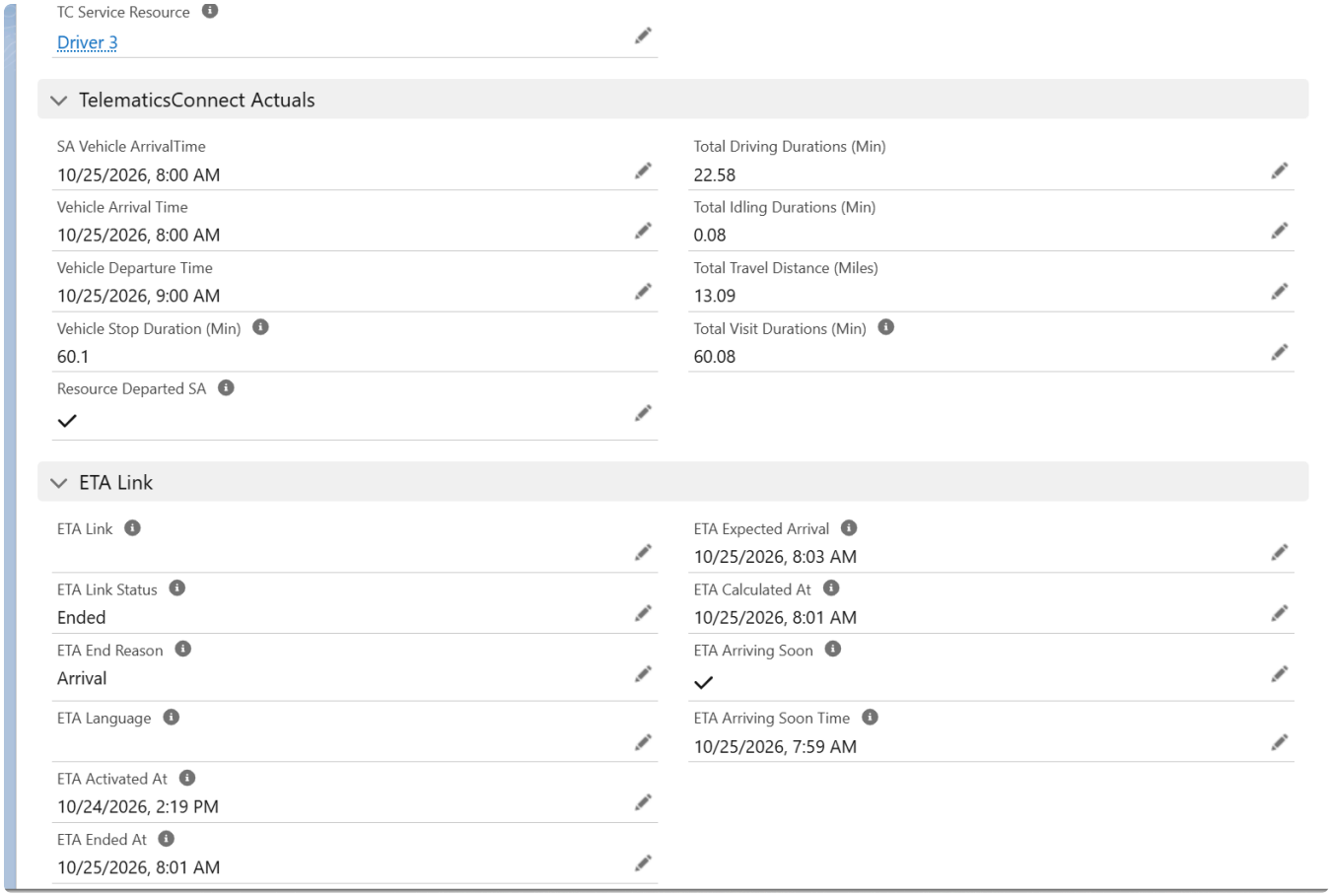
TelematicsConnect Actuals

Field	Meaning
SA Vehicle ArrivalTime	First arrival at the site
Vehicle Arrival Time	Latest arrival (differs from the first after a return visit)
Vehicle Departure Time	When the van left after the latest arrival; blank while it is on site
Vehicle Stop Duration (Min)	Latest arrival to departure: the last visit only
Total Visit Durations (Min)	All stop times at this SA, over every visit
Total Driving Durations (Min), Total Idling Durations (Min), Total Travel Distance (Miles)	Totals of the trips matched to this SA
Resource Departed SA	Ticked when the van has left and driven beyond the minimum distance

ETA Link

Field	Meaning
ETA Link	The link to send to the customer; empty when no link is active
ETA Link Status	Active or Ended
ETA End Reason	Arrival, End condition, Time limit, or Replaced (a newer link for the same technician)
ETA Expected Arrival, ETA Calculated At	The latest ETA and when it was calculated
ETA Arriving Soon	Ticked when the van is close (1 km by default), for an "almost there" message

Field	Meaning
ETA Activated At, ETA Ended At, ETA Language	When the link started and ended, and its language



A5. Reading a Trip

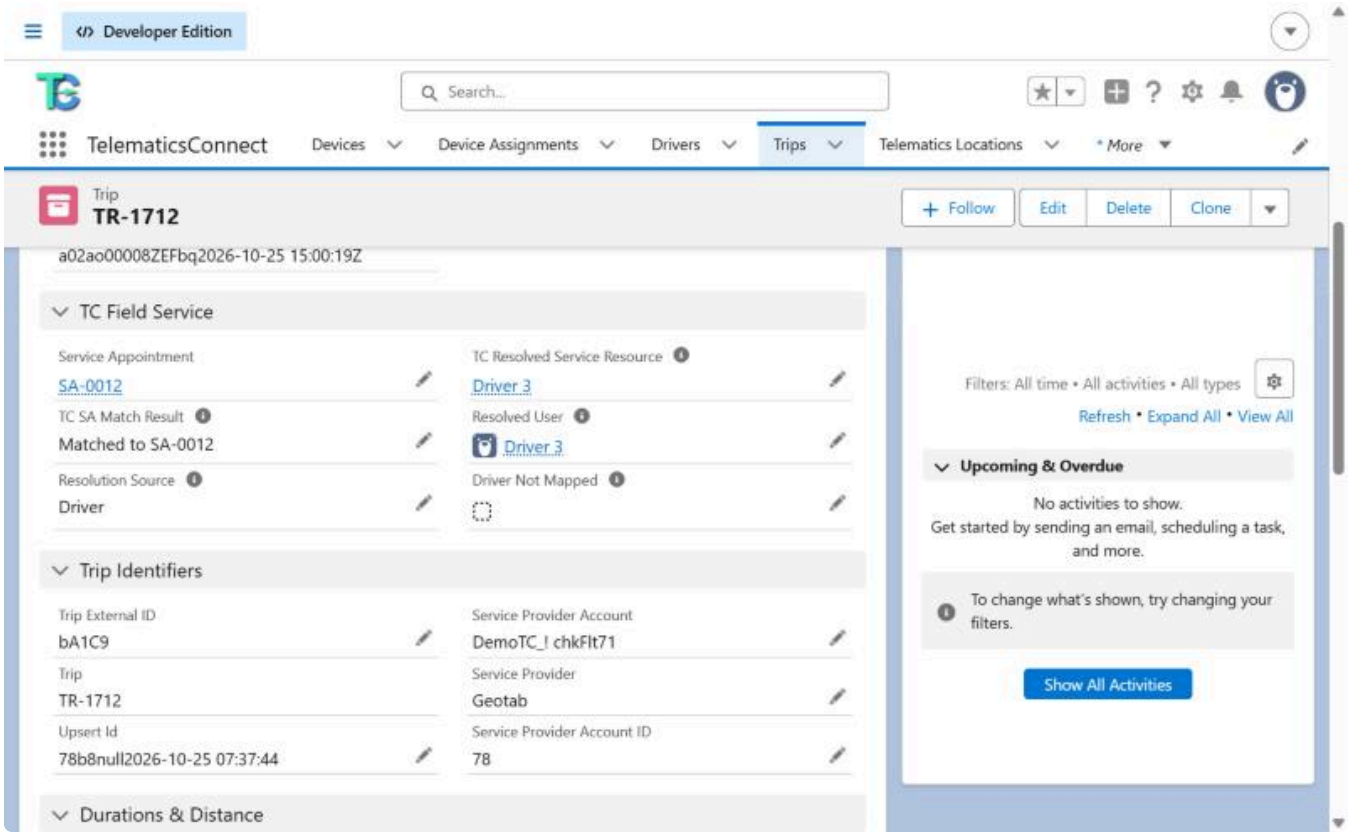
Each trip says whether it was matched to an SA and, if not, why, in **TC SA Match Result**.

TC SA Match Result	Meaning
Matched to SA-0012 (on-site)	The van stopped at that SA and is still there
Matched to SA-0012	The van stopped at that SA and has since moved on
No SA match: no driver or vehicle assignment found for …	Nobody was found for the trip: see Driver Not Mapped below

TC SA Match Result	Meaning
No SA match: no active SA geofence for this technician at the stop	The van stopped somewhere that isn't one of this technician's dispatched SAs
…; stopped at geofence Depot	Not an SA, but a geofence you created (for example a depot)
No match: no stop location	The provider sent no stop position

The trip's **TC Field Service** section also shows:

- **TC Resolved Service Resource**: the technician who drove.
- **Resolution Source**: how they were found (Driver or Device Assignment).
- **Driver Not Mapped**: ticked when the driver logged in with an ID whose TC Driver has no User yet (or doesn't exist). Tell your admin (B4).



A6. The ETA link

Your customer opens the link on their phone, without a login, and sees the van on a map, the route and the expected arrival time.

What the customer sees

- Your logo, company name and colour, and a "Call us" button if you set a phone number.
- The van as an arrow moving along the route, updated about once a minute.
- The expected arrival time and a countdown, recalculated every 5 minutes with live traffic.
- "Vehicle location at": the time of the van's last GPS position.
- The page in the customer's language (English, German, French, Spanish, Italian or Dutch, as your admin sets).

When the link starts and ends

- **Starts** when the driver sets off to that customer (for example the SA goes En Route), or when the previous job ends, if your admin switched that on.
- **Ends** when the van's arrival is recorded, when the SA reaches an end status (for example In Progress or Completed), or after a safety time limit (4 hours by default). The customer then sees "This link has expired".
- Each technician has **one active link**. A new link for the same technician ends the older one (End Reason "Replaced").

Privacy. The page shows only that appointment's van and ETA: no driver's surname, no other jobs, no data after the link ends.

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...p.my.salesforce-sites.com

GPSDASHBOARD TC Test

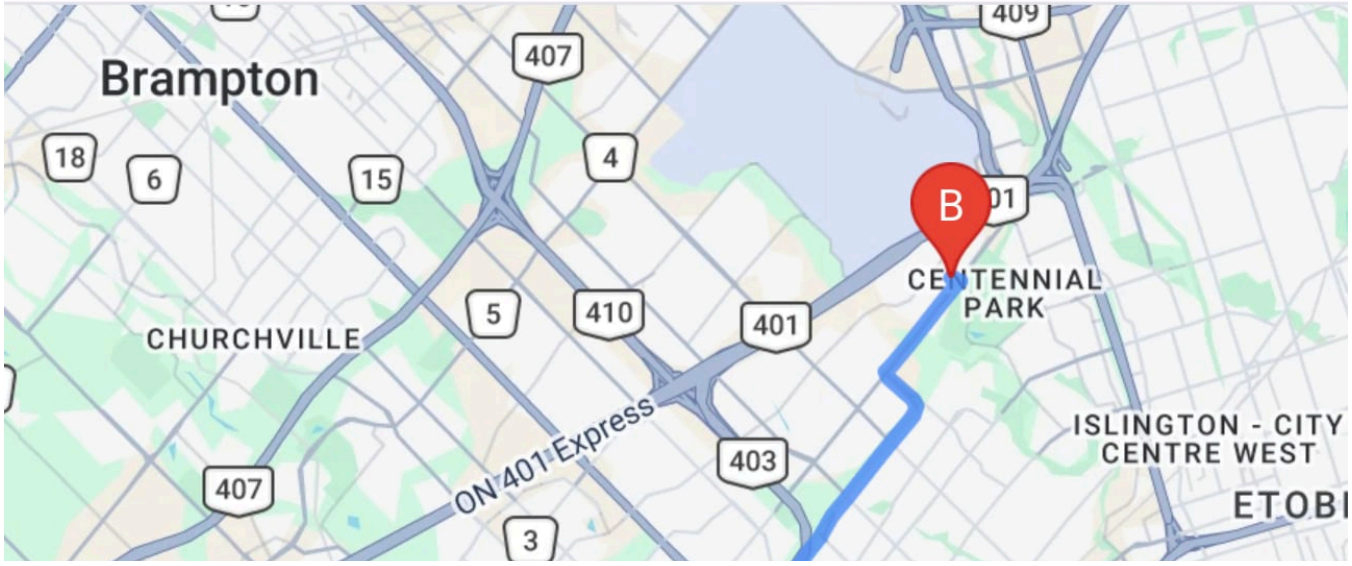
Your technician is on the way

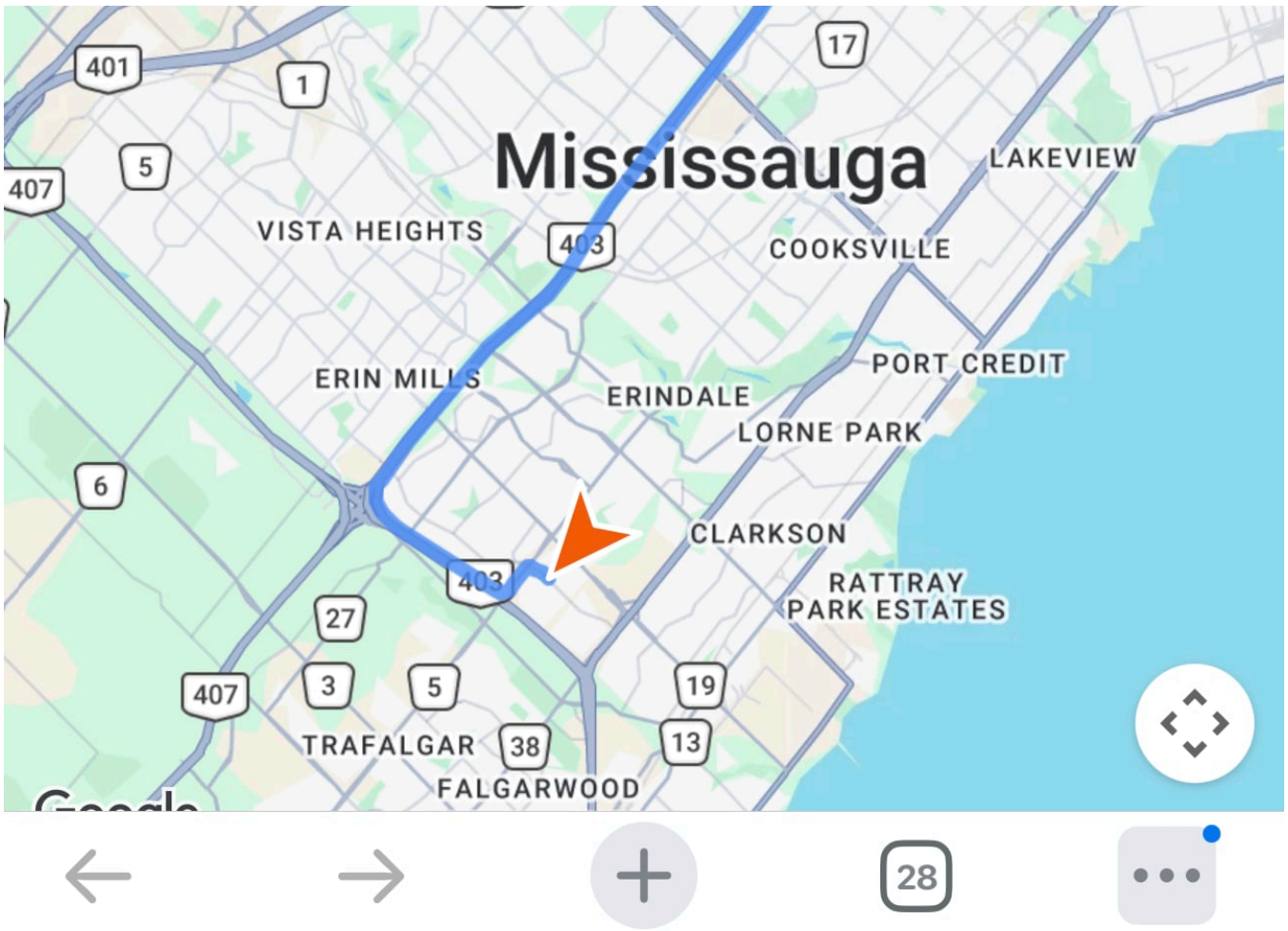
22 min

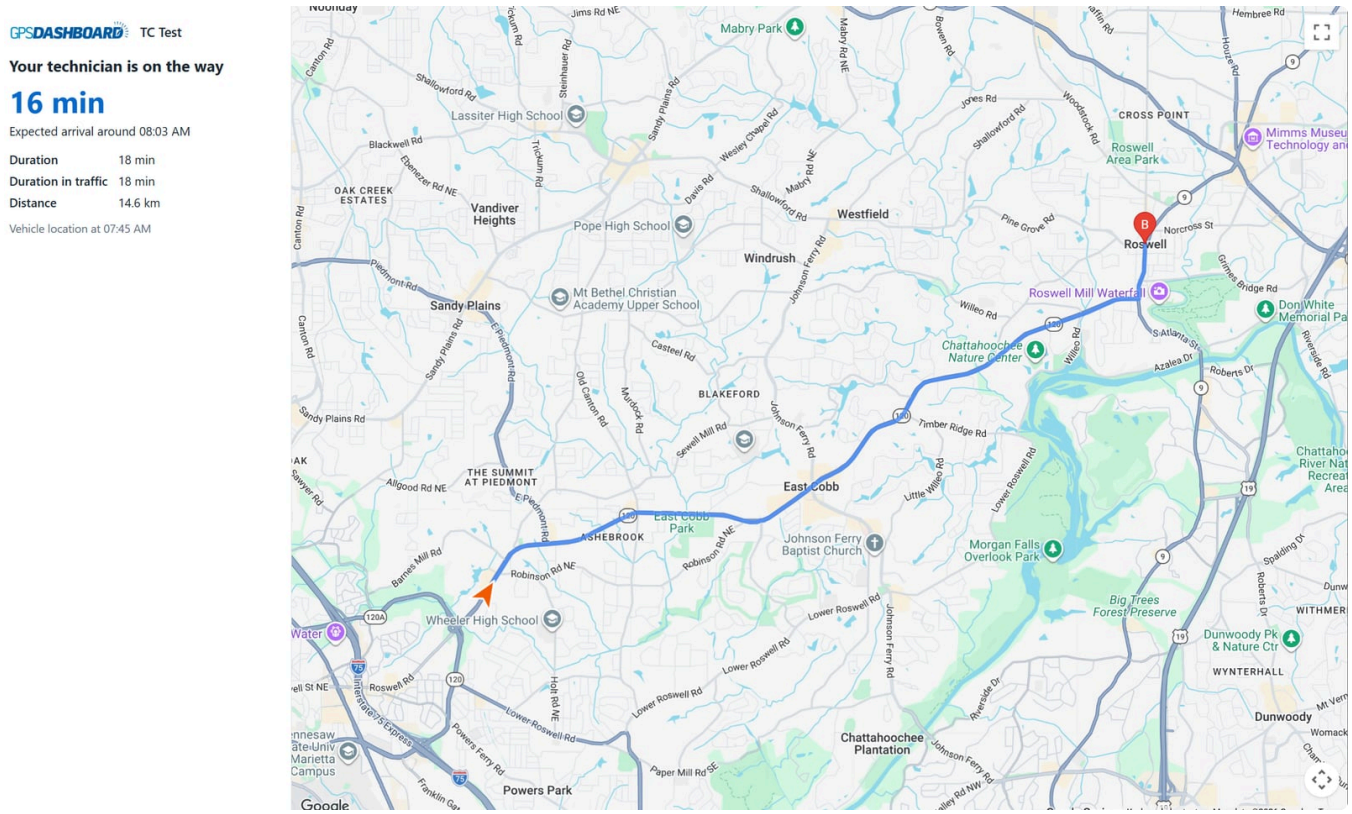
Expected arrival around 10:12 AM

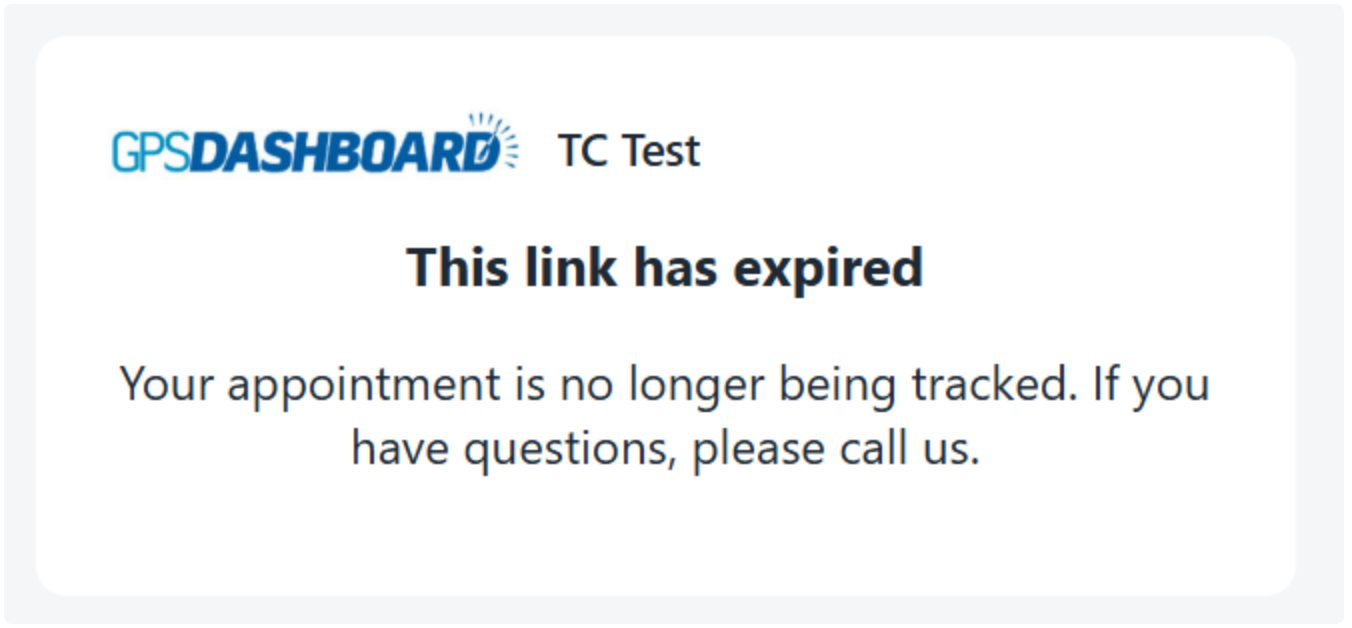
Duration	22 min
Duration in traffic	22 min
Distance	22.4 km

Vehicle location at 09:48 AM




401
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LAKEVIEW
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VISTA HEIGHTS
403
COOKSVILLE
PORT CREDIT
ERIN MILLS
ERINDALE
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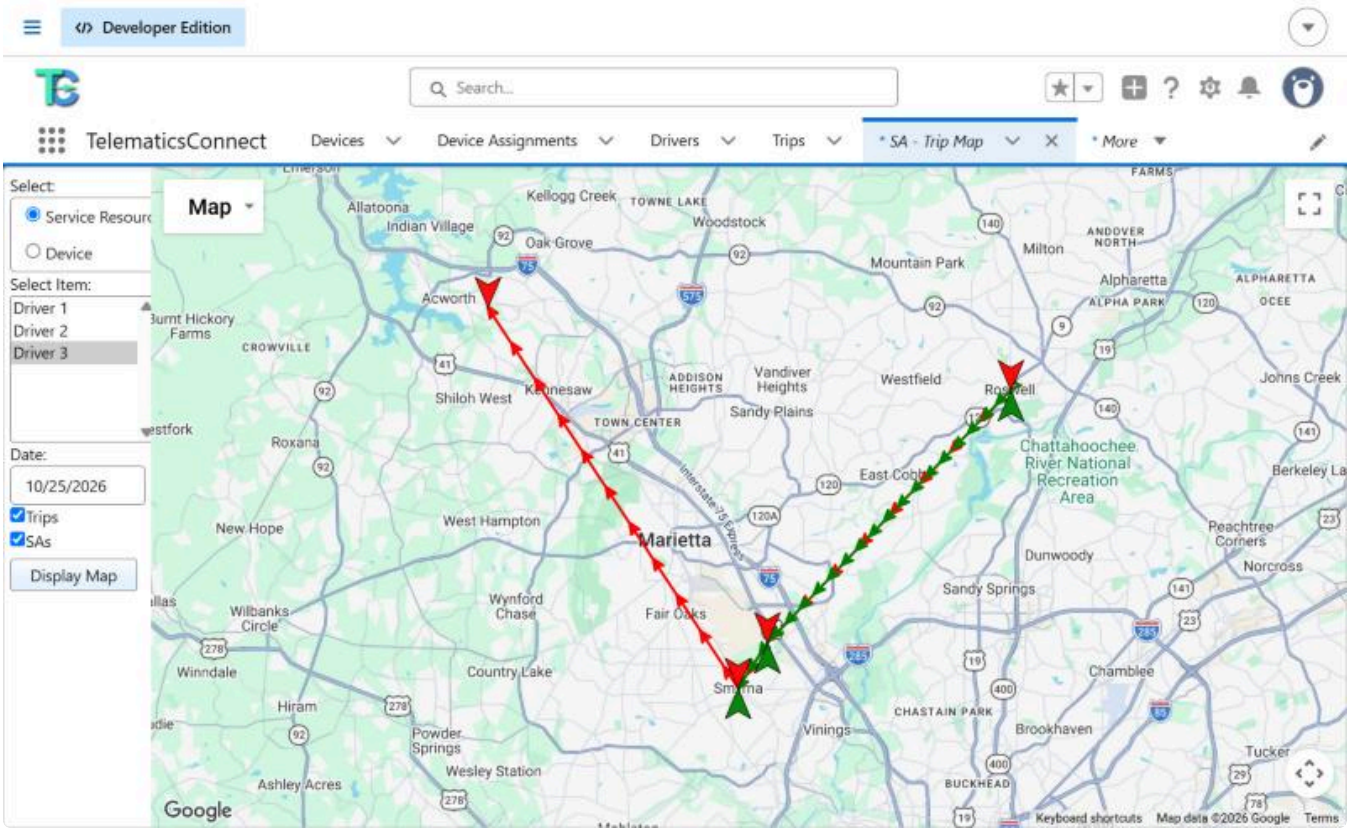


A7. SA Trip Map

The **SA - Trip Map** tab shows a day's trips and SAs on one map, to check a route against the plan.

- **Service Resource:** a technician's SAs and every trip they drove that day, in any van.
- **Device:** a van's trips that day and the SAs of the technicians who drove it.

- The day is your own local day.



A8. Reports

The report folder **TC Ext Field Service** holds two ready-made reports; clone them to change.

- **TC SAs with Trips:** SAs from the last 7 days with their matched trips, arrival, departure, totals and geofence. Use it to compare plan with actual.
- **TC SR Last Known Location:** each technician's last position from the Field Service mobile app.

For your own reports, use the report types **TC SAs with Trips**, **TC SR Last Known Location** and **TC Trips with Technician**.

A9. Troubleshooting

Start with the trip's **TC SA Match Result**: it says why a trip was not matched.

What you see	Likely cause	What to do
SA has no geofence	SA not dispatched, or no address (latitude/longitude)	Dispatch it; check the address is geocoded
No arrival on the SA	The SA was assigned or dispatched after the van arrived	Assign and dispatch before the van leaves; earlier trips are not re-checked
Trip shows "no driver or vehicle assignment found"	Driver not logged in and no Device Assignment, or Driver Not Mapped	Admin sets up the Driver or Device Assignment (B4)
Trip shows "no active SA geofence for this technician"	The SA is assigned to another technician, or not dispatched	Check TC Service Resource and the status
No departure	The van is still on site, or the next trip hasn't arrived yet	Wait for the next trip (a few minutes)
ETA Link empty	Activation condition not met, or ETA switched off	Check the SA status; ask your admin
Customer sees "tracking not available"	The technician's van can't be found or hasn't driven in 12 hours	Check who drove (B4)
Customer sees "This link has expired"	The van arrived, the job ended, or the time limit passed	Normal; see ETA End Reason on the SA

A10. Known limitations

- **Assign and dispatch before the van arrives.** Trips already received are not re-checked later.
- **Who drove is decided once**, when the trip arrives. Trips before a Driver or Device Assignment existed stay Unassigned.
- **Address changes** after dispatch are not followed: the geofence stays at the old address.
- **Completed or canceled SAs** are never updated by trips, even if the van returns.
- **Departed is not cleared** if the van comes back (for example after a parts run). The departure time always describes the latest visit.

- **Arrival can be provisional** for a few minutes when a van drives through a site just as its position is sent; it corrects itself on the next trip.
- **Deleted trips** do not change SA totals.
- **Assigned Resource records are not read:** the technician comes from your technician field through the flow kit.

Part B: Admin Setup

B1. Prerequisites and install

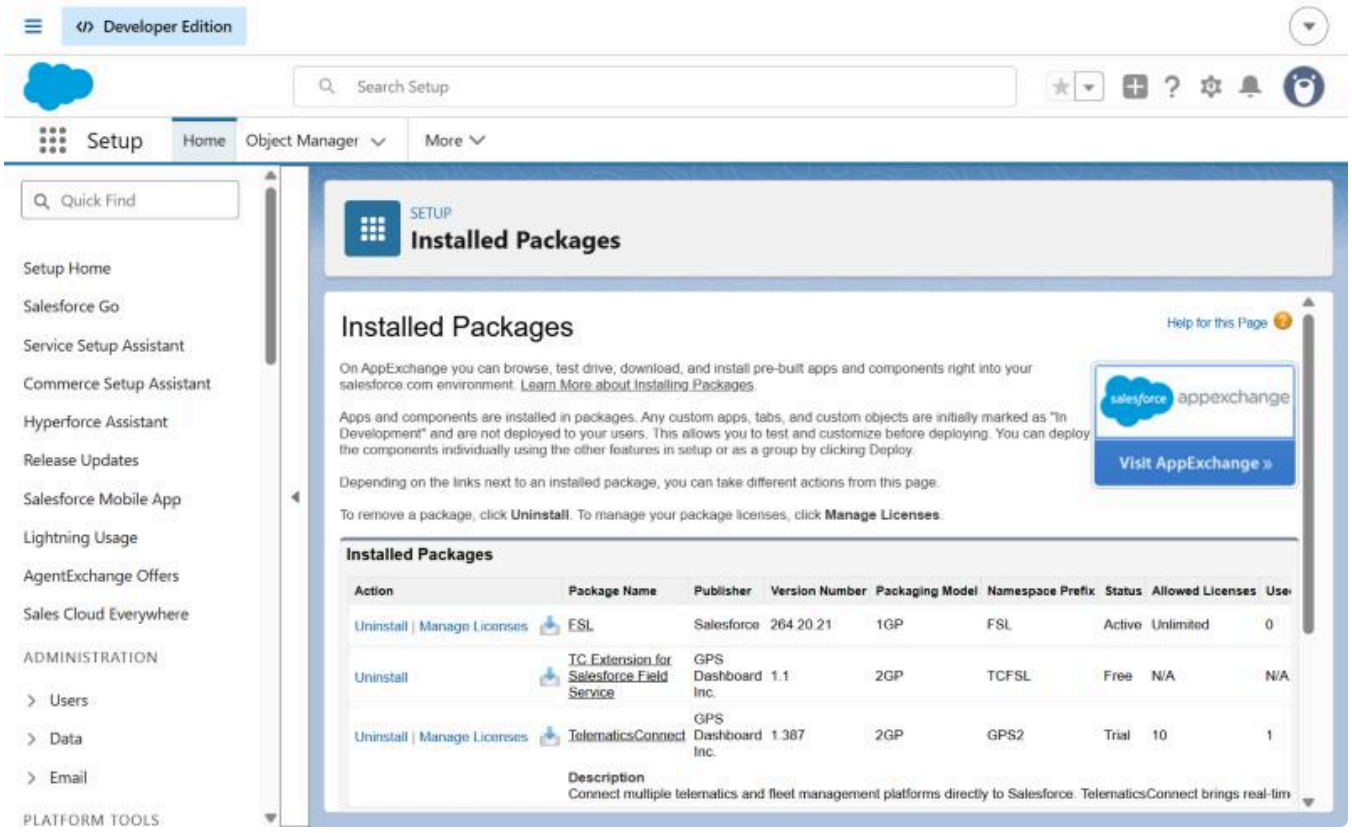
Install in this order: Field Service, then TelematicsConnect, then the extension. Installing changes nothing on its own: all automation ships switched off until step B6.

Prerequisites

- [ ] **Salesforce Field Service** (Winter '27 or later) installed and set up.
- [ ] **TelematicsConnect 1.386.0.6 or later** installed, with trips arriving from your telematics provider. **1.388 or later is recommended:** it creates Drivers automatically (B4), and its permission sets cover the whole TelematicsConnect app.
- [ ] The TelematicsConnect trip export runs **every 2 minutes**. The extension sees a van leave from its next trip, so a slower export means a later departure.
- [ ] Your provider sends **driver IDs on trips** (driver log-in), or you keep **Device Assignments** in Salesforce (step B4).

Install

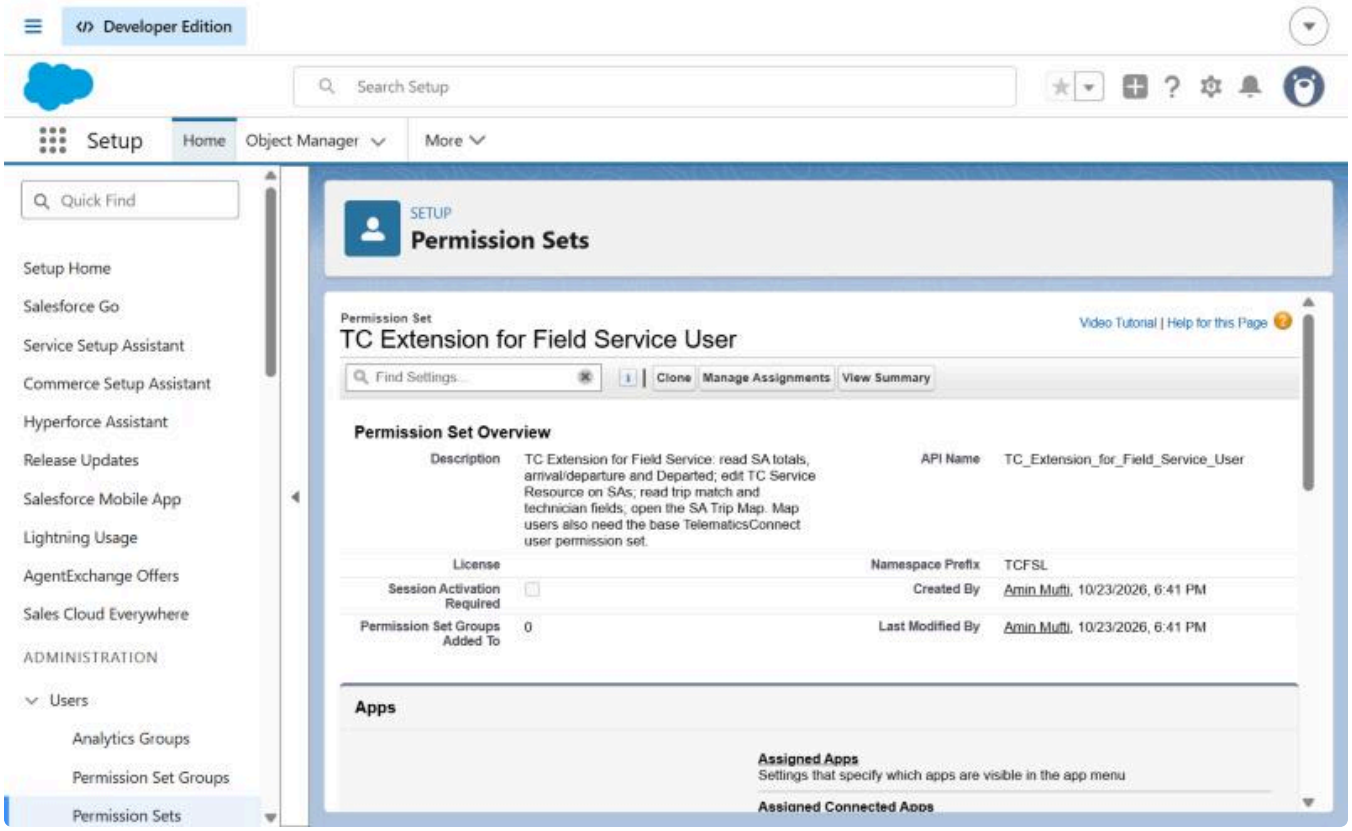
- [ ] Open the install link while logged in to the org:
  - Production: `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tUn000001uG9ZIAU`
  - Sandbox: `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tUn000001uG9ZIAU`
- [ ] Choose **Install for Admins Only**. You give access with permission sets in step B2.
- [ ] Check **Setup → Installed Packages** lists Field Service, TelematicsConnect and TC Extension for Field Service.



B2. Permissions, page layouts and reports

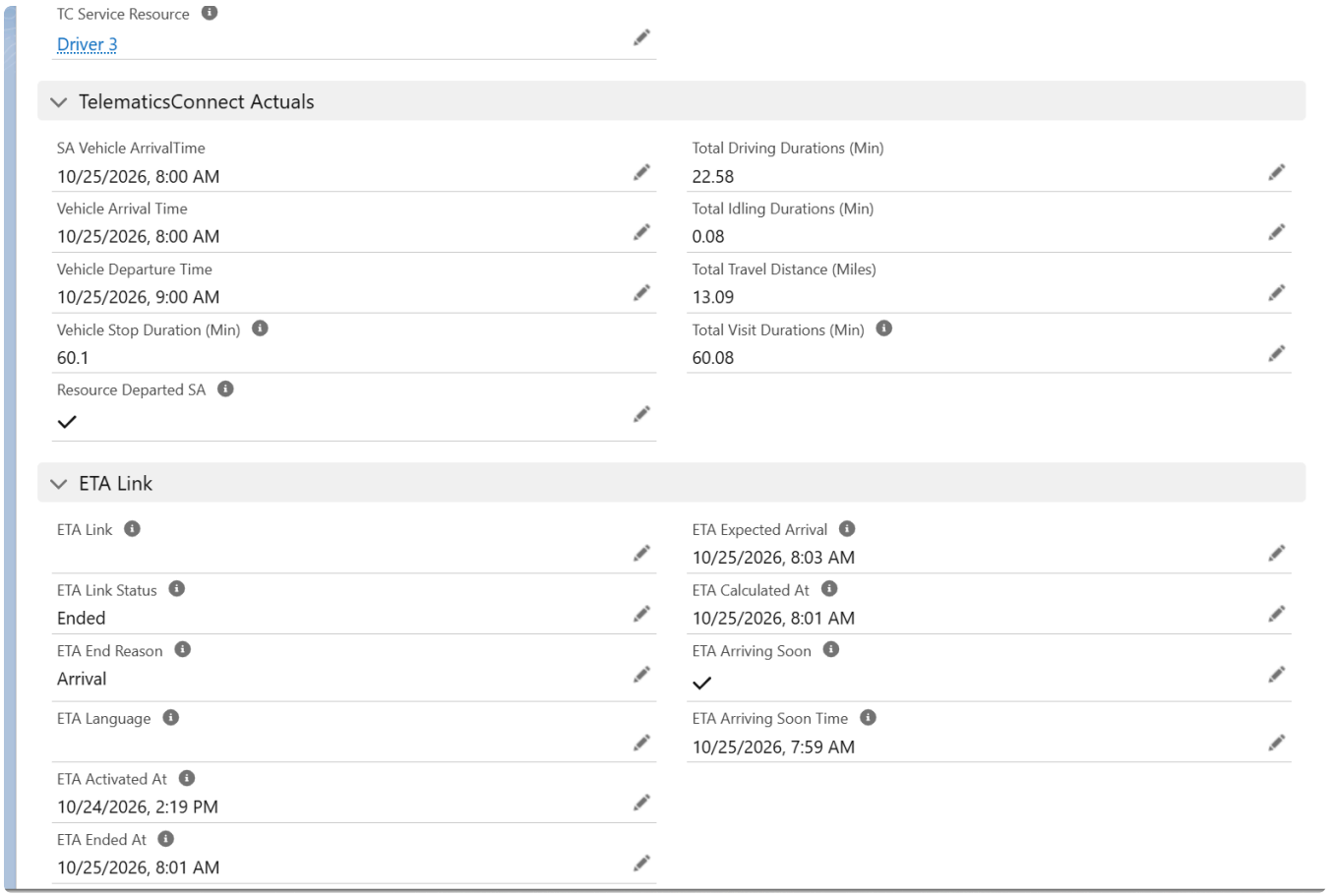
Give dispatchers and managers one permission set, then add the extension's fields to your layouts.

- [ ] Assign **TC Extension for Field Service User** to dispatchers, planners, managers and anyone who uses the SA Trip Map. It gives read access to the SA results and the trip match, edit access to TC Service Resource on SAs, and the SA Trip Map tab.
- [ ] SA Trip Map users also need the TelematicsConnect permission set **TC User**. From TelematicsConnect 1.388 it covers trips, devices, drivers, geofences and the maps; with an earlier version, some TelematicsConnect objects must also be granted through profiles.
- [ ] Technicians need neither permission set: the automation runs regardless of the user.



Page layouts. The package includes two reference layouts. They are not assigned on install: assign them to your profiles, or copy their sections into your own layouts.

Layout	Object	Sections added
TC Ext for Field Service Appointment	Service Appointment	TelematicsConnect Setup, TelematicsConnect Actuals, ETA Link
TC Ext Field Service Trip Layout	Trip	TC Field Service (Service Appointment, TC SA Match Result, TC Resolved Service Resource, Resolved User, Resolution Source, Driver Not Mapped)



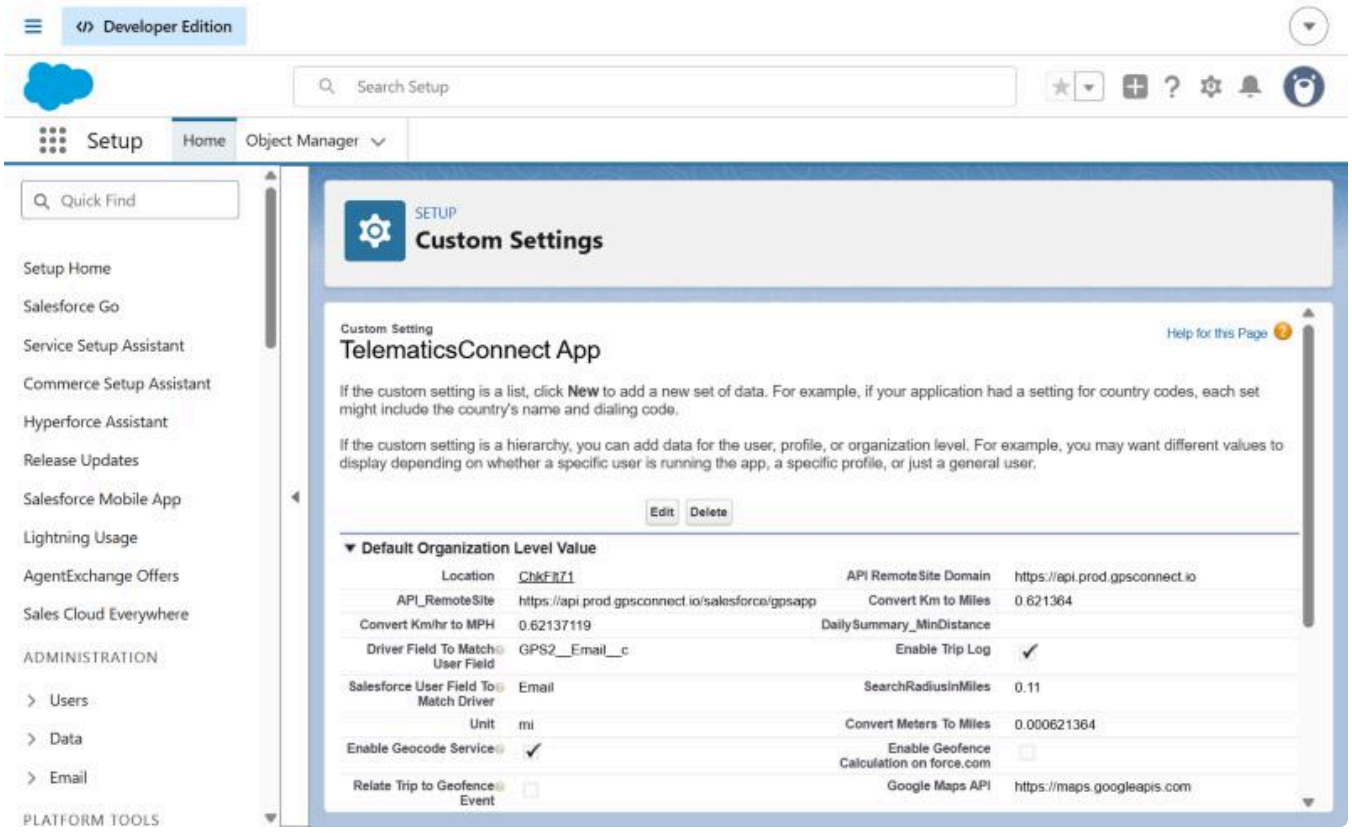
Reports. Share the report folder **TC Ext Field Service** with dispatchers and managers. It holds **TC SAs with Trips** and **TC SR Last Known Location**. The report types **TC SAs with Trips**, **TC SR Last Known Location** and **TC Trips with Technician** are there for your own reports.

B3. TelematicsConnect settings

Turn off TelematicsConnect's own geofence calculation: the extension does all geofence matching, and both on at once give conflicting results.

Setup → Custom Settings → **TelematicsApp** → Manage → org default → Edit:

- [ ] **Untick "Enable Geofence Calculation on force.com".** Geofences not linked to an SA (for example depots) are still recorded on trips but get no totals.
- [ ] Check **SearchRadiusInMiles** (for geofences without their own radius) and **Unit**.



B4. Who drove each trip

TelematicsConnect decides who drove each trip once, when the trip arrives, and the extension uses that result. Set up Drivers and Device Assignments **before go-live**: a trip that arrives before its driver is set up stays Unassigned.

How TelematicsConnect decides, in order:

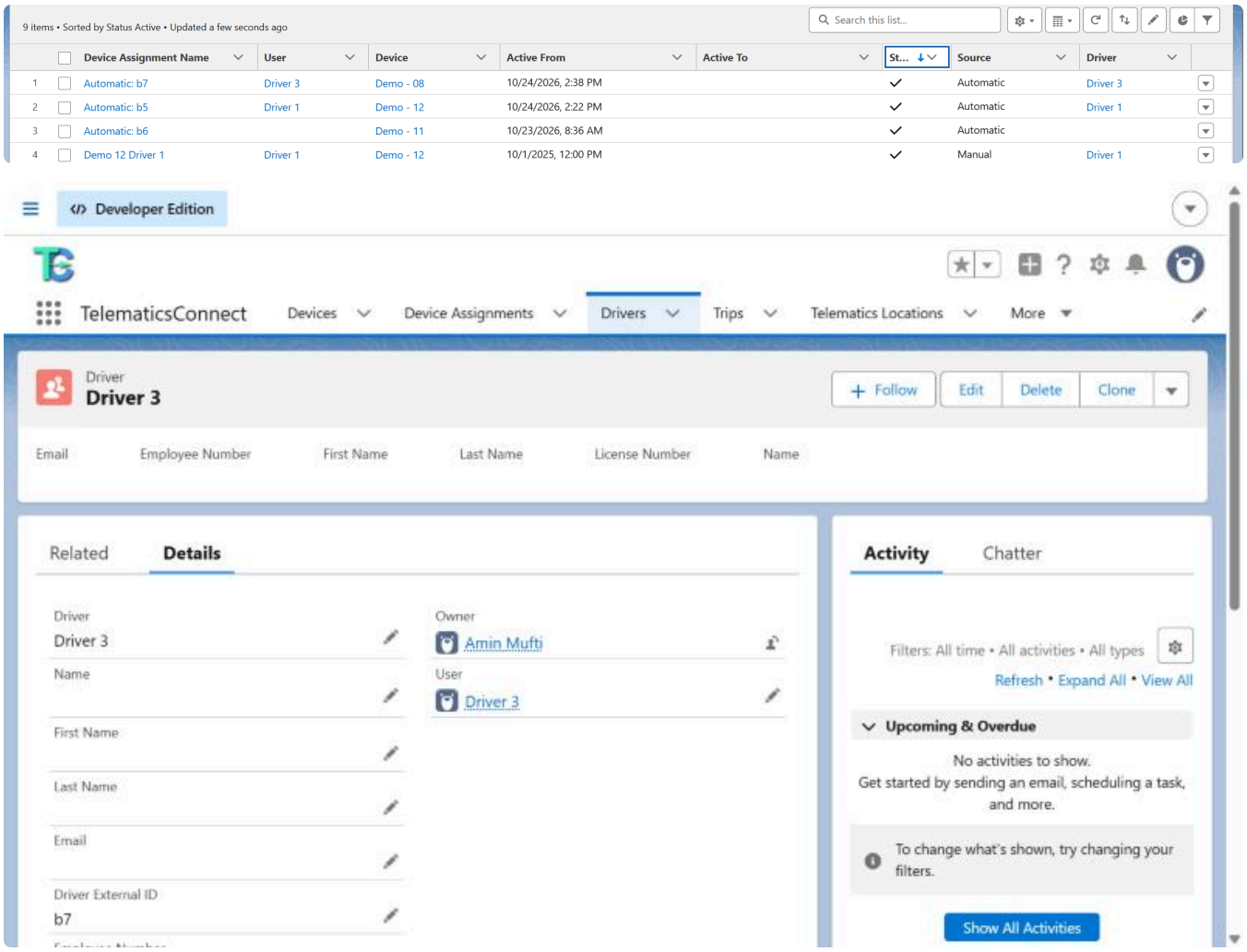
1. The trip has a **driver ID** with a **TC Driver** that has a **User** → that User (Resolution Source "Driver").
2. The driver ID has no TC Driver, or the Driver has no User → **Unassigned**, with **Driver Not Mapped** ticked. There is no fallback: set up the Driver.
3. No driver ID (nobody logged in) → the **manual Device Assignment** covering the trip's time (Resolution Source "Device Assignment").
4. Otherwise → Unassigned.

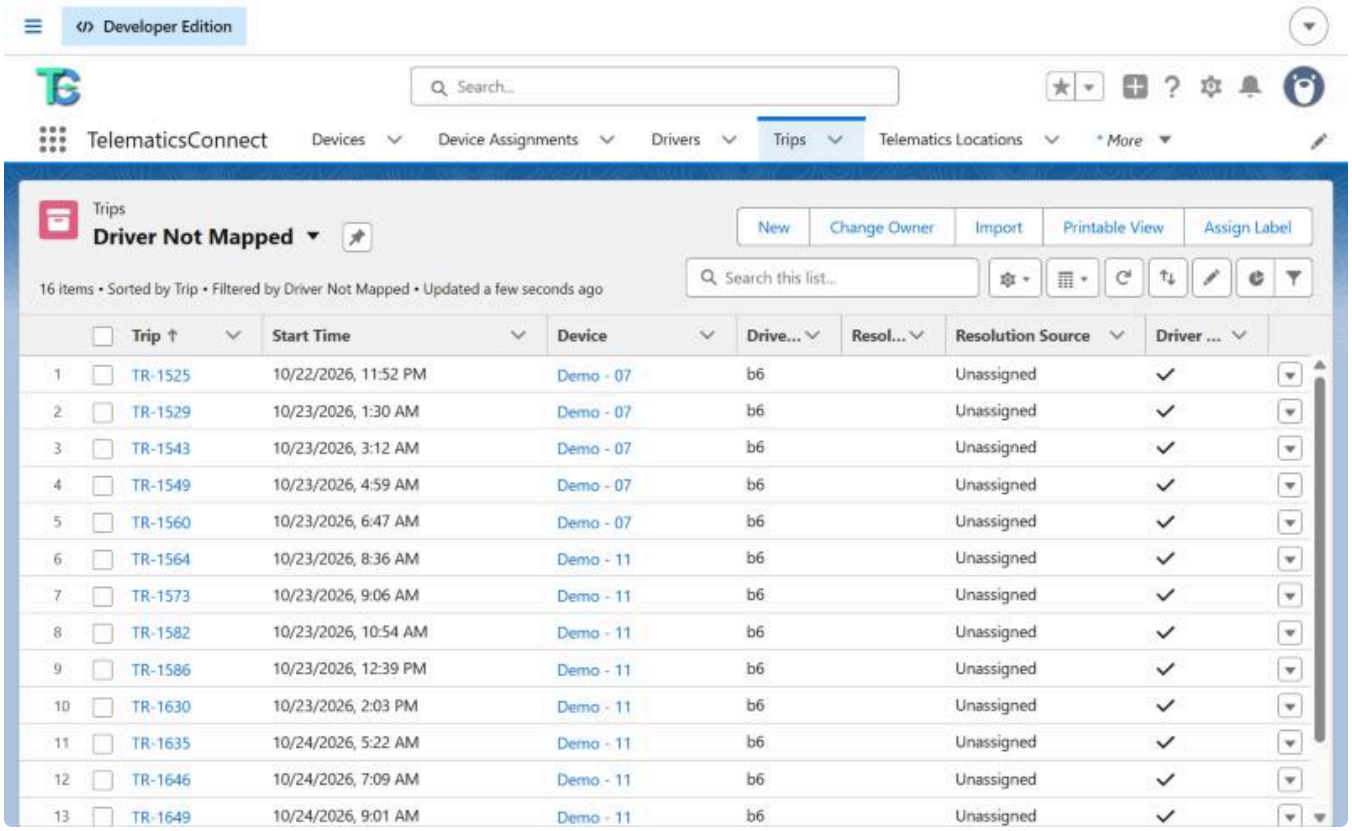
Set up

- [ ] **Link each TC Driver to its technician.** From TelematicsConnect 1.387, a **TC Driver** is created automatically for each new driver ID on a trip, with only the driver ID (**Driver External ID**) and no User. Open the Drivers list view **Drivers without a User** and fill in

each Driver's **User** (the technician). To create Drivers by hand instead turn on **Don't Create Drivers from Trips** in the TelematicsConnect settings and create one TC Driver per technician: Driver External ID = the driver ID from your provider, User = the technician. With TelematicsConnect 1.386, Drivers are never created automatically: create them this way.

- [ ] For vans without driver log-in, create a **manual Device Assignment** per technician and van: Device, User, Active From, and Active To when it ends. Assignments for one van must not overlap.
- [ ] Each technician's **Service Resource** points at their Salesforce **User** (standard Field Service setup).
- [ ] After go-live, check the Trips list view **Driver Not Mapped** and the Drivers list view **Drivers without a User**. Each driver ID listed needs a TC Driver with a User.





B5. Flow kit: the technician on the SA

The extension reads the technician only from its own field, **TC Service Resource**, on the Service Appointment. A small flow, which we provide, copies your own technician field into it on every save.

- [ ] Set the flow to your technician field's API name, deploy it, and **activate** it. We do this with you during setup.
- [ ] Save your open SAs once (bulk update), so TC Service Resource is filled for existing appointments.
- [ ] Tell dispatchers: **assign technicians only in your own technician field.** A manual change to TC Service Resource is overwritten on save. Add your field next to TC Service Resource on the SA layout.

> **Screenshot S10:** the flow in Flow Builder, active (to capture)

B6. Extension settings, then switch on

Check the settings, then switch on geofences and matching last. From then on, dispatched SAs get a geofence and trips are matched to them.

Geofence For Service Appointment. Setup → Custom Metadata Types → Geofence For Service Appointment → Manage Records → **Default**:

Setting	Default	What it does
SA Field To Create Geofence / Values	Status = Dispatched	When the SA gets its geofence
Geofence Radius (Meters)	300	Size of the circle around the SA address
Geofence Latitude / Longitude	the SA's Latitude / Longitude	Where the geofence is placed
Geofence Dates Use SA Dates	On	Geofence valid from the SA schedule −1 day to +1 day
De-Activate Geofence On SA Completion	Completed, Canceled	Statuses that end the geofence
Trip Batch Size	50 (maximum 80)	Trips processed per background job

- [ ] Switch **ON "Enable Create Geofence Checkbox"**.
- [ ] Switch **ON "Enable Geofence Calculation In Ext Pckg"**.

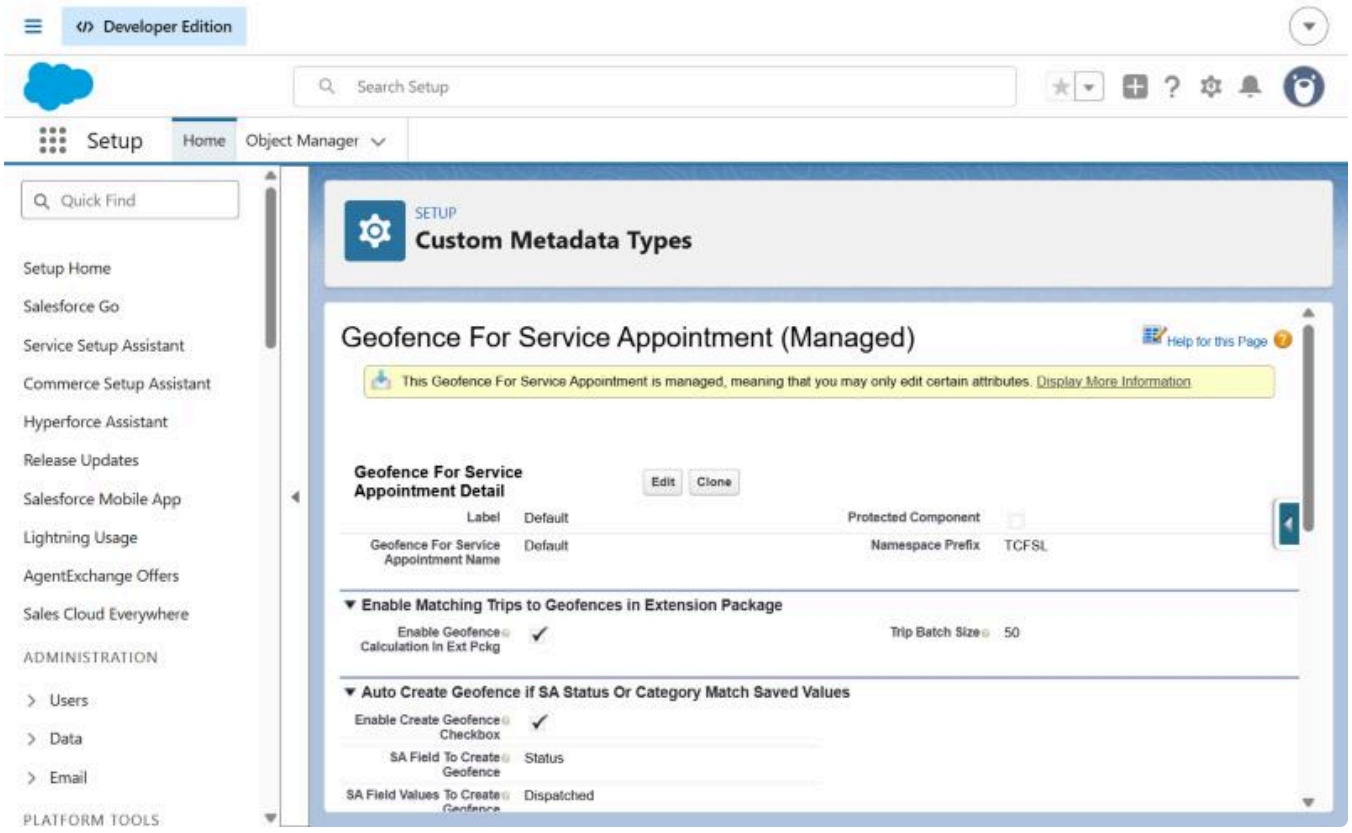


Image — Geofence For Service Appointment, Default record (bottom)

Resource Departed Service Appointment (optional). Sets the SA's **Departed** flag when the van leaves, for example to start the next customer's ETA. Arrival and departure **times** are written even when this is off.

Setting	Default	What it does
Minimum Travel Distance (Miles)	0.5	How far the van must go to count as leaving
SA Status Departed	blank (no change)	Optional status to set; FSL must allow that status change
Status Field Values	Completed, Canceled	SAs in these statuses are skipped

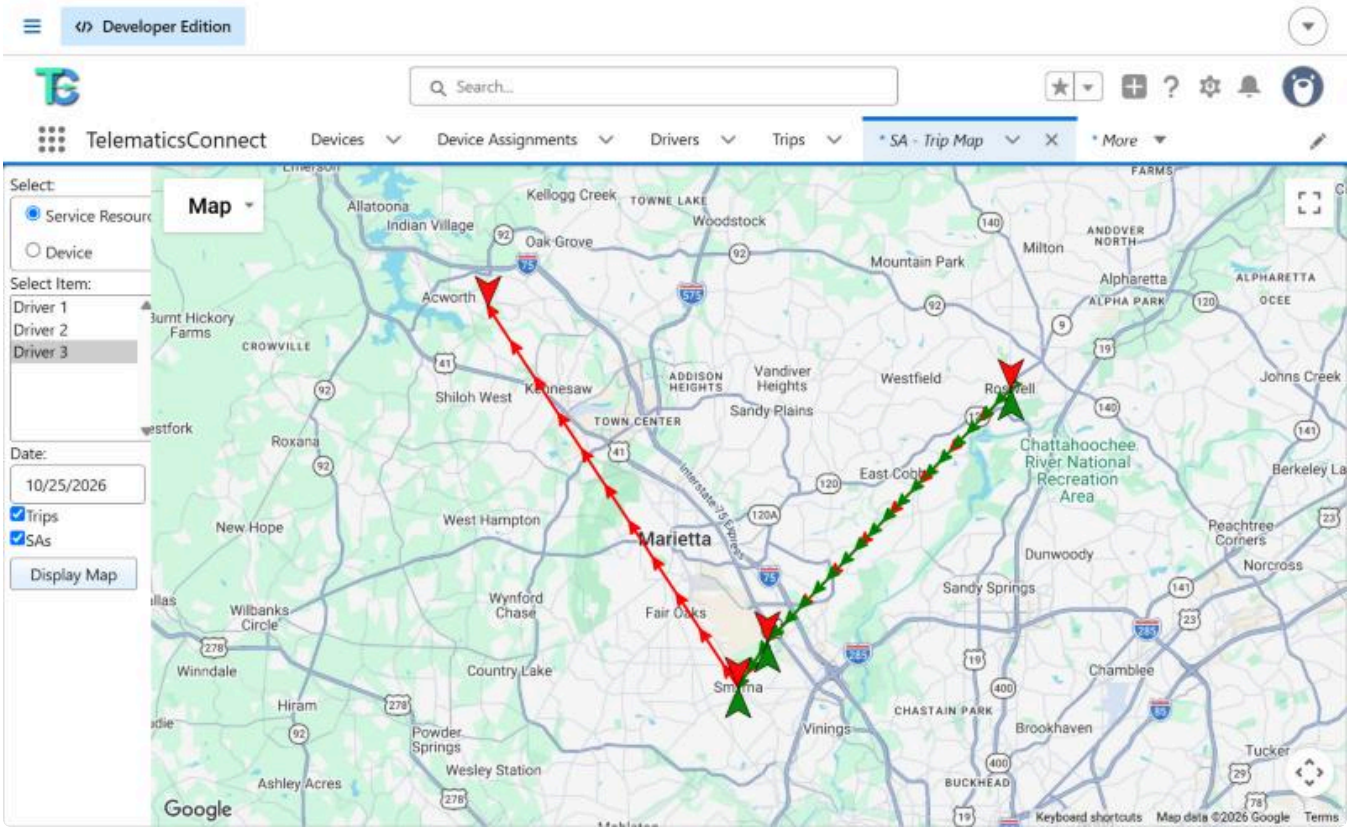
- [ ] Switch **ON "enableSRDeparted"**.

Image — Resource Departed Service Appointment, Default record

B7. SA Trip Map

Add the tab; the map works with no further setup.

- [ ] Add the **SA - Trip Map** tab to the apps your dispatchers use.
- [ ] Pick **Service Resource** (a technician's SAs and every trip they drove that day) or **Device** (a van's trips and its drivers' SAs).



B8. ETA link setup (optional)

The ETA page runs on a Salesforce Site in your own org: customers open it without a login, and it shows only the one appointment's van, route and ETA. ETA ships switched off.

B8a. Salesforce Site (once per org)

- [ ] Setup → **Sites**: accept the Sites Terms of Use and click **Register My Salesforce Site Domain**. Until then, every Site shows "Down for maintenance".

- [ ] Click **New**: label "ETA", web address suffix `eta`, **Active Site Home Page** = **ETA**, **Active** ticked. Save.
- [ ] On the Site: **Public Access Settings** → **Assigned Users** → the Site guest user → **Permission Set Assignments** → assign **TC Extension ETA Guest**. It opens the ETA page only and gives no record access.
- [ ] Copy the Site address (for example `https://yourcompany.my.salesforce-sites.com/eta`) and open it: "This link has expired" means the Site works.
- [ ] Optional, your own web address (for example `eta.yourcompany.com`): Setup → **Domains**, add a CNAME record at your DNS provider, and let Salesforce issue the certificate (allow a few days). Send us the address: we add it to the Google Maps key.

Image — The ETA Site in Setup

Image — Site guest user with TC Extension ETA Guest assigned

B8b. Languages (only for languages other than English)

- [ ] Setup → **Translation Workbench** → **Translation Language Settings** → Edit each language you need (German, French, Spanish, Italian, Dutch) → tick **Active**. Without this, the page shows in English.

Image — Translation Workbench before it is enabled: click Enable, then activate your la…

B8c. Your logo

- [ ] Setup → **Static Resources** → New: upload your logo, **Cache Control = Public**. One image file, not a ZIP. Best: SVG, or a transparent PNG of about 420 × 132 px under 100 KB (shown at most 44 px high, 140 px wide).

Image — Logo static resource with Cache Control Public

B8d. ETA Settings. Setup → Custom Metadata Types → **ETA Settings** → Manage Records → **Default**:

Setting	Default	What it does
Link Base Address	blank	Your Site address or own domain. Required: without it no link is created
Activation Field / Values	Status = En Route	When the link starts
End Field / Values	Status = In Progress, Completed, Canceled, Cannot Complete	When the link ends
End on Recorded Arrival	On	Also ends the link when the van's arrival is recorded
Safety Time Limit (Hours)	4	Ends a link that is still open after this time
Auto-Activate Next SA on Departed	Off	Starts the technician's next SA that day when they leave (needs Departed, B6)
Languages Offered / Default Language	en	Page languages; two or more show a picker
Language Field	blank	Field holding the customer's language, for example on Contact
Company Name, Logo Static Resource, Brand Colour, Call Us Phone	blank	Your branding on the page (Brand Colour defaults to blue #0B6BCB)
Distance in Miles; Show Route Line, Distance, Duration in Traffic, Technician First Name	various	What the page shows
ETA Recalculation Interval (Minutes)	5	How often the ETA is recalculated
Van Marker Refresh (Seconds)	60	How often the van moves on the map

Setting	Default	What it does
Arriving Soon Radius (km)	1	Ticks ETA Arriving Soon for an "almost there" message; 0 = off

Activation rule. Start the link with a condition the technician sets **per job, when leaving for that customer**: an En Route status, or a "Start ETA" checkbox from the Field Service mobile app. Never use a status set on many SAs at once, such as Dispatched: each technician has one active link, and the newest replaces the older.

- [ ] Switch **ON "Enable ETA"**.

Image — ETA Settings: branding

Image — ETA Settings, Default record (top)

Image — ETA Settings, Default record (bottom)

Shown from a test org that starts the link on Dispatched with a 36-hour limit. In production use En Route and 4 hours, as in the table above.

B9. Sending the link to your customer

The extension fills **ETA Link** on the SA; your messaging sends it. Send when ETA Link changes from empty to filled (or **ETA Link Status** becomes Active), never when it is empty.

- [ ] **Email:** a small record-triggered flow emails the link to the SA's contact. We set it up with you for the pilot.
- [ ] **SMS or WhatsApp:** through a messaging provider connected to Salesforce (for example Twilio). Already have one? We connect it. Not yet? Choose one, and we help you set it up.
- [ ] Optional second message when **ETA Arriving Soon** is ticked.

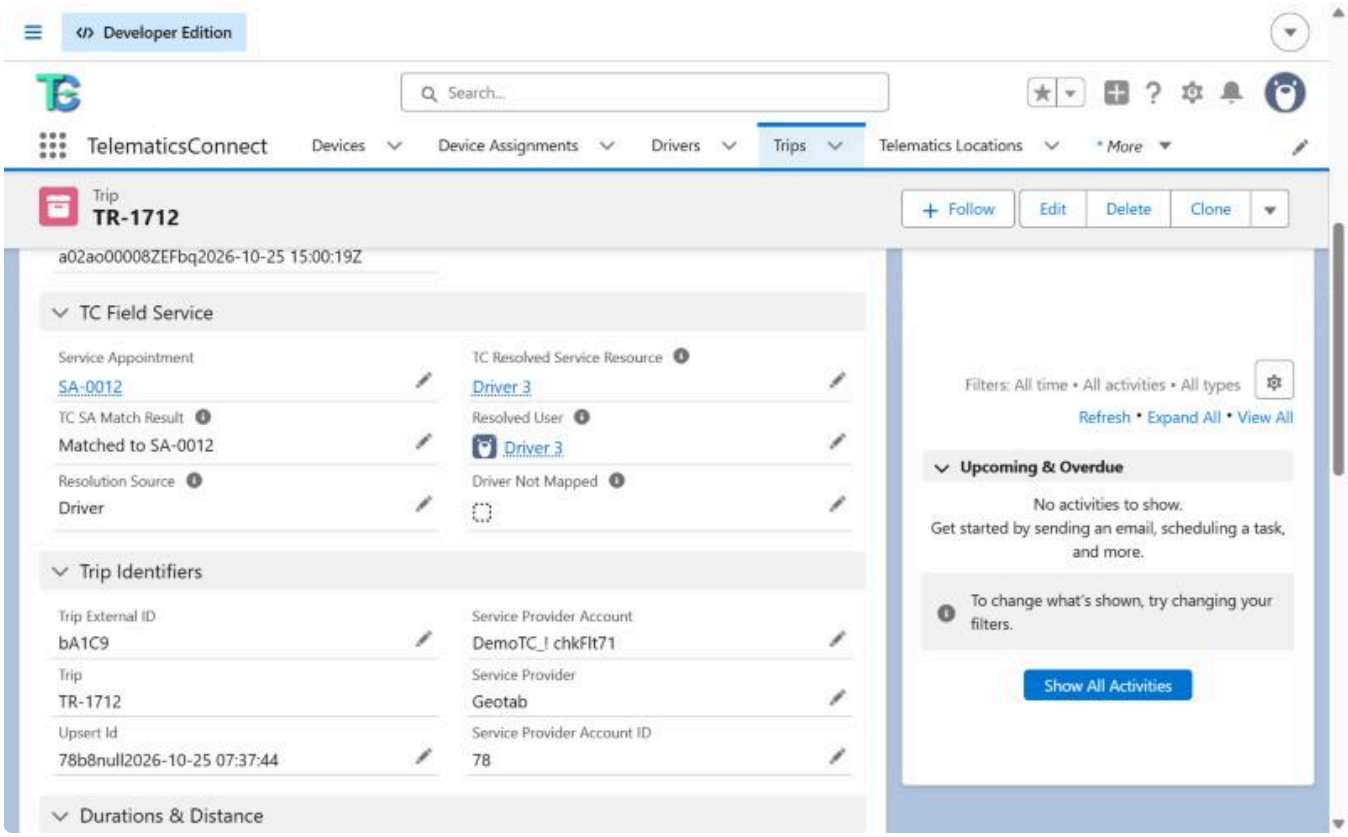
- [ ] Keep messages free of emojis: a standard SMS holds 160 characters, one emoji lowers it to 70. Show your company name as the sender where your provider allows it.
- [ ] Add the ETA to your **privacy notices** for customers and technicians (text in the Appendix).

> **Screenshot S19:** the email flow (to capture once built)

B10. Check it works

Run one test SA end to end with a van that is driving.

- [ ] Dispatch a test SA with an address and a technician → a **Geofence** appears in its related list, named after the SA.
- [ ] The van drives there and stops → within a few minutes the trip shows **TC SA Match Result** = "Matched to SA-… (on-site)", and the SA shows first arrival, latest arrival and driving totals.
- [ ] The van leaves → the SA shows the departure time, Vehicle Stop Duration and Total Visit Durations. **Departed** is ticked if switched on and the van went beyond the minimum distance.
- [ ] The trip shows the technician in **TC Resolved Service Resource**. If **Driver Not Mapped** is ticked, set up that Driver (B4).
- [ ] ETA: set a test SA to the activation value → **ETA Link** is filled and **ETA Link Status** = Active. Open it on a phone: the van, the route and the ETA show, and the van moves about once a minute.
- [ ] Set the SA to an end value → the link empties, **ETA End Reason** = End condition, and the open page shows "This link has expired" within a minute.



Appendix

Privacy notice text for the ETA link

Sample wording to adapt: you are the data controller and decide the final text. Replace the parts in [brackets] and have your data protection officer review it. In Germany and Austria, also involve the works council before go-live. Settings are in B6 and B8d; fields are in A4 and A5.

For your customers

When our technician is on the way to your appointment, we may send you a link by [SMS / WhatsApp / email]. The link opens a web page showing the technician's vehicle on a map, the route to your address and the expected arrival time. No login is needed.

- **What is shown:** the vehicle's current position (updated about once a minute), the route, the drive time, the expected arrival time and your appointment address[, and the technician's first name].
- **How long:** the link works only while the technician is on the way. It stops when the technician arrives, when the appointment is completed or cancelled, or at the latest [4] hours after it was sent.

- **Who processes the data:** the page is provided from our Salesforce system. Google calculates the route and draws the map, and receives the vehicle's position and your address coordinates for this. [Your messaging provider] delivers the message.
- **Please don't forward the link:** anyone with it can see the vehicle's position while it is active.

For your technicians

Our vehicles report their position through [Geotab]. When you are on the way to an appointment, the customer receives a link showing your vehicle's position, the route and the expected arrival time.

- **When:** only from when the link starts ([for example when you set the status to En Route]) until you arrive, the appointment ends, or at the latest [4] hours later.
- **What the customer sees:** the vehicle's position and route and the expected arrival time[, and your first name]. Never your surname, your phone number or the vehicle's position at other times.
- **What is stored:** the expected arrival time and when it was calculated, on the appointment. The ETA link stores no vehicle positions.
- **Purpose:** to tell customers when to expect you, and to reduce calls and missed appointments.

Facts for your data protection officer

Item	Fact
Hosting	The ETA page runs on your own Salesforce Site; the data stays in your Salesforce org
Link	A 12-character random code, never the record ID; active only between start and end, with a safety time limit; one active link per technician
Data shown	Vehicle position (from the latest trip, about 2 minutes behind), route, drive time, distance, expected arrival, destination address; technician first name only if switched on
Stored on the SA	Link code, link, status, start and end time and reason, language, expected arrival, calculated at, arriving-soon flag and time

Item	Fact
Sub-processors	Salesforce (hosting); Google (route and map, receives vehicle and destination coordinates and the language, through GPS Dashboard's Google account); your messaging provider