



ClickSoftware FSE End-of-Life (EOL) Migration Guide

Information and Tips to Help Navigate
Field Service Edge's (FSE) EOL



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Diabsolut and the Purpose of this Guide

This guide was put together by Diabsolut consultants with backgrounds in field service, across numerous industries and a variety of roles – as well as ClickSoftware and Salesforce technology experts – to help organizations plan for ClickSoftware Field Service Edge’s (FSE) end of life (EOL).

We know how big of a decision and financial commitment transitioning to a new field service management solution is. Our experts have experienced that type of transition firsthand – and have all worked closely with enterprise organizations as they navigate the legacy system replacement and migration process.

It’s our hope that this guide helps your own organization as you plan for solution migration. We encourage you to review the information in this guide with your leadership team and contact us with any questions. We’re happy to offer any help and support you need to ensure your solution replacement and transition process is a success.



ClickSoftware EOL Overview

What does EOL Mean?

End of life (EOL) for technology refers to the cut-off point of vendor support for that product, system, software, etc.; meaning it will no longer be updated or fixed when problems occur and is more susceptible to security and compatibility concerns. In the case of Field Service Edge (FSE), EOL will be even more impactful – December 31st, 2026, marks the date when solution access and options to extend functionality will become extremely limited.

The dates on the timeline below illustrate milestones in the retirement of ClickSoftware's Field Service Edge (FSE) solution.

ClickSoftware FSE End-of-Life Timeline



FSE EOL: Background Information and Timing

ClickSoftware, Salesforce, and the Evolution of Salesforce Field Service

To better understand the timing behind this decision, it helps to look at the history of ClickSoftware's product development. ClickSoftware's solutions were the gold standard for field service management for years.

ClickSoftware FSE was launched in 2016. That same year they began a partnership with Salesforce, with the goal of creating a Salesforce field service management (FSM) product, Field Service Lightning (FSL).

Why would they help develop a competing product?

Salesforce's solution expertise was already well-established, and they would be approaching field service management in a new way – by using Click's core functionality to develop a FSM solution using Salesforce's innovative platform technology.

When Salesforce began focusing more heavily on providing industry-specific solutions it led to their acquisition of ClickSoftware by in Q4 of 2019, to further accelerate solution development. This accelerated development contributed to the eventual renaming of Field Service Lightning to Salesforce Field Service in 2021.

Salesforce has continued to work on development, industry-specific innovation, and improvements since the acquisition.

Per the Official Salesforce ClickSoftware Acquisition Announcement:

“

ClickSoftware enables companies to intelligently schedule and optimize field service work. Salesforce Field Service Lightning, built on Service Cloud, harnesses the latest in dispatching, mobile workforce empowerment and IoT technologies to empower companies to connect their entire service workforce on a single, centralized platform. With the combined capabilities of Field Service Lightning and ClickSoftware, Salesforce will be positioned to lead the way to the future of field service.

”

[Read the Salesforce announcement](#)



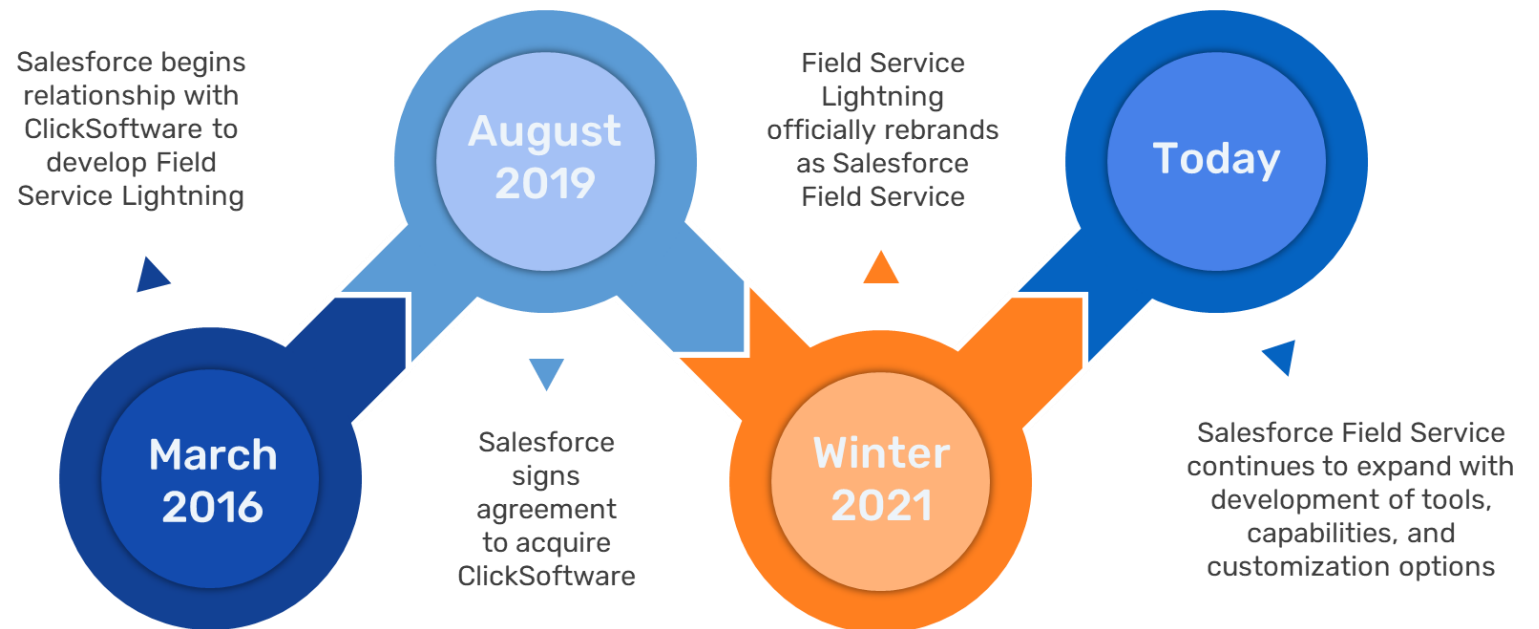
FSE EOL: Background Information and Timing

ClickSoftware, Salesforce, and the Evolution of Salesforce Field Service

This brings us back to the timing of FSE EOL; the decision to retire FSE was made because:

- FSE's architecture and capabilities are becoming outdated
- Many FSE customers have already made the decision to migrate to a new solution

Although ClickSoftware's 8.x and FSE solutions had continued to be maintained by Salesforce, due to the reasons listed above and the rapid pace at which technology continues to evolve – Salesforce made the decision to retire 8.3 (8.x), followed by FSE.



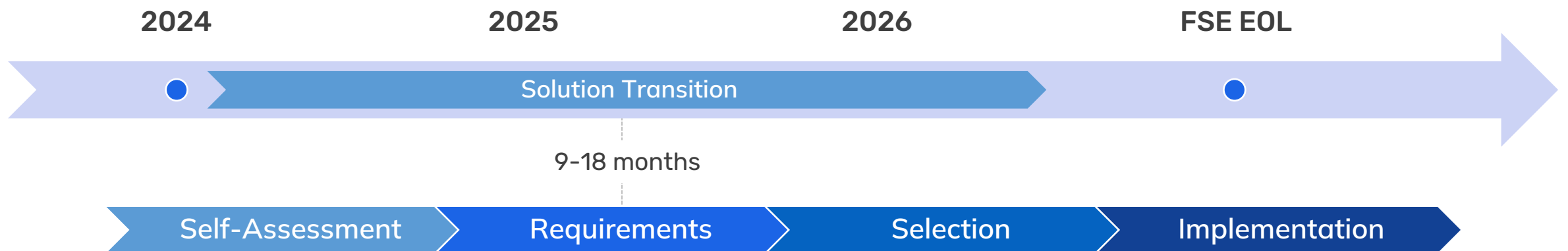
What Does EOL Mean for Organization Using FSE?

Salesforce will continue to support FSE customers with security, stability, and performance releases until EOL. However, if your organization is currently using FSE as your field service management solution, we highly recommend you start planning for your solution migration as soon as possible to give yourself the time and flexibility needed to avoid FSE EOL related risks like lost data and functionality.

Time of year, resource availability, budget, industry challenges, and organizational change saturation will all factor into how successful your organization will be when migrating to a new solution. More time means more options (from both a technical and budgetary standpoint) and a greater chance of migrating without disruption.

What is the recommended timeline for solution migration and what should the transition process include?

For most enterprise organizations 9-18 months is recommended to fully transition. Solution migration should ideally be completed several months before EOL, to allow time for trouble-shooting and further optimization if needed.





Migration Approach and Tips for Success

How should early preparation and self-assessment begin? By looking into several factors that will impact your organization's approach; ask yourself and your team:

- 1** What solution features (including FSE functionality, additional systems, and customization) do we use today, and do we fully understand our processes?
- 2** What is new/upcoming, what are customer expectations, and where is the industry moving?
- 3** How long do we need to implement (rollout) our FSE replacement?
- 4** Are we culturally prepared for a large system change (e.g., how much other change is happening, how has change been received in the past, do we have the right resources in place to support this, etc.)?
- 5** Do we have a partner to help guide us through thought processes, and if not, how long much time can we allow for the RFP process?

Finding a ‘Right Fit’ Migration Approach

Determining the right approach for migration will also depend on a variety of factors – including the answers to your questions on the previous page, your unique requirements, your FSE replacement, and the knowledge, experience, and delivery method(s) of the partner you choose to work with.


Broadly speaking, there are two standard approaches for transitioning to a new solution, which we call tactical and transformative. Tactical focuses on the most basic effort needed to transition, while transformative focuses on the big picture and utilizing the migration process to optimize solution, user, and business performance. To give you a better understanding of what a tactical and transformative approach look like, we’ve listed a brief overview of the options (which can be combined if preferred) our own organization offers for FSE migrations:

Our Tactical Approach

This approach is focused on equivalent functionality and data migration, relying on feature parity whenever possible. We include process and solution documentation, as well as a solution roadmap and improvement prioritization.

Best for organizations that:

- Have time and resource availability constraints
- Are quickly approaching EOL without a replacement solution or plan in place
- Need minimal user impact and change management


 Ideal timeline for enterprise-level organizations: 9-12 months

Our Transformative Approach

Focused on business, process, user, and technical improvements that will provide maximum short- and long-term benefits and ROI. Can be combined with tactical; also includes documentation, roadmap, and prioritization planning.

Best for organizations that:

- Want to improve the way they address challenges
- Would like a more strategic and holistic solution
- Want to leverage platform capabilities to reduce processes, applications, and costs

 Ideal timeline for enterprise-level organizations: 12-18 months

Tips for Success

As mentioned in the introduction, we have experts with decades of experience working with ClickSoftware and Salesforce technology, as well field service experience across numerous industries. This experience includes ClickSoftware 8.3 EOL and legacy system solution migrations that have resulted in key lessons learned. For any organization planning their FSE EOL migration, we strongly encourage the following tips for a successful transition:



Plan Ahead

- Define Clear Scope
- Abbreviated Stages
- Equipped Delivery
- Enabled Resources
- Decreased Cost



Self-Awareness

- Set Clear Targets
- Understand User Challenges
- Build a Surgical Approach
- Improve Experience



Solution Knowledge

- Avoid Gaps
- Include User Acceptance
- Identify Benefits
- Opportunity to Improve Automation



User Engagement

- Push Early and Often
- Assess Usability in RFX
- Plan User Acceptance
- Change Management



Smart Execution

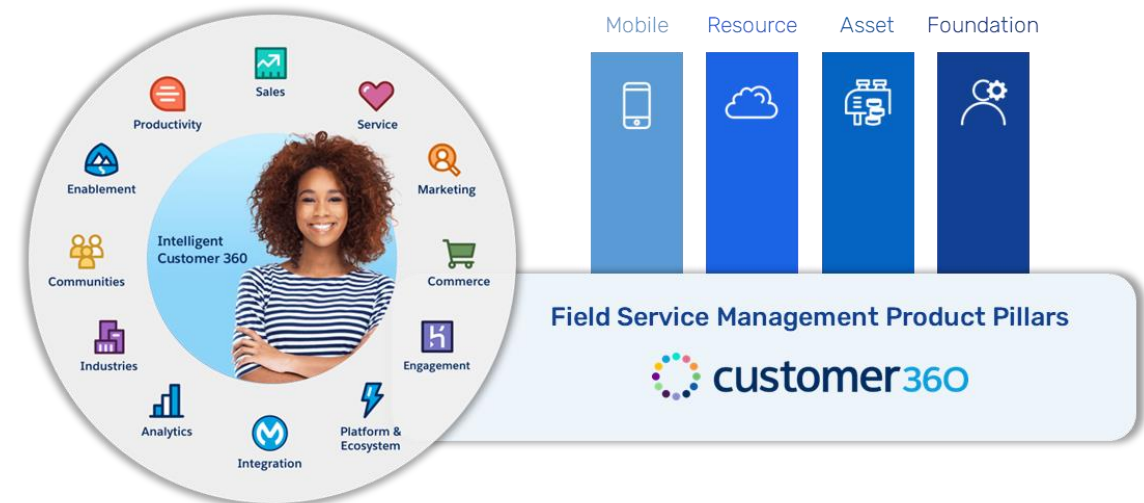
- Understand Timelines
- Replace & Improve
- Drive User Acceptance
- Document Benefits

Salesforce Field Service as a FSE Replacement

In terms of a replacement for FSE, think of Salesforce Field Service (SFS) as FSE evolved – with a redesigned scheduling and optimization engine at its core (next gen. released by Salesforce in 2023, which includes new features like multiple breaks), as well as significant upgrades and benefits unique to SFS.

Key Solution and Partner Benefits Include:

- Access to continuous innovation; Salesforce provides regular [SFS feature releases](#) and invests heavily in performance and innovation
 - They are at the forefront of [industry-relevant and secure AI and generative AI](#)
- Solution capabilities have been designed with customer self-sufficiency in mind, and users have access to [Trailhead](#), a free learning management system (LMS)
- Salesforce offer stability as an organization and SFS has leading analyst and user ratings – meaning it offers security and longevity in terms of investment
- Enterprise-grade performance and availability for user community, including faster and more mobile-friendly features and enhanced automation
- An extensive partner ecosystem (more information on page 14)



Salesforce Field Service as a FSE Replacement: Additional Benefits

Salesforce Field Service has numerous technical and feature benefits (a selection of features is listed on the next page), including many that address FSE user pain points. These benefits are more extensive than what we can list here, but include:

- Low/no-code configuration, with declarative/point-and-click tools
 - A large amount of features, functionality, configuration settings, and interfaces are available out of the box (OOTB)
 - This, along with an extensive Salesforce partner ecosystem, means personalization is largely simple, straightforward, and cost-effective
- Point-to-point location accuracy, predictive routing, and real-time visibility of field resources and processes
- Customer impacts and experiences that are clear; KPIs are based on collective, rather than siloed information
- The possibility to create any level of automated business workflows, validation, approval processes, automated alerts, and information transfers (e.g., reports, emails, SMS, SLA Compliance, etc.)
- Appointment Assist – the equivalent of Click’s Customer Engagement Model (CEM)
- Extensive field and back-office capabilities and automation; such as deep-link mobility, intelligent scheduling, robust shift management, an optimization hub, built-in reports, and offline access
- Optimization Insights, which monitor optimization cycles with OOTB KPIs and metrics, to understand at a quantitative level how a given optimization policy is doing
- Reporting analytics which are accurate and obtainable in one click
- Knowledge Articles that enable self-help options and guidance for end-users (employees to customers)
- SLA/Entitlement/Milestone Tracking can be used to create tickets to push through to the appropriate teams and areas of your business
- Architecture which makes is easier to scale, and includes added layers of security
- Dispatch tool improvements that include Google geo-coding, map interaction, and dedicated crew management

Salesforce Field Service as a FSE Replacement: Feature Examples

Mobile

- Deep Link Global Actions
- Mobile Product Transfer
- Appointment Assistant:
 - Self-Service Scheduling
 - Contactless Signature
- Extensibility with Lightning Web Components
- Offline Briefcase Multi-Level
- Briefcase Builder
- Mobile Work Summarization [Pilot]

Resource

- Shifts in Resource Time Zone
- Appointment Bundling
- Holiday Management
- Resource Preference
- Shift Automation and Color Coding
- Optimization Hub
- Work Bundling and Capacity Limits

Asset

- Serialized Product: Purpose-Built UX
- Criteria-Based Preventative Maintenance
- Usage-Based Preventative Maintenance
- Asset 360 Innovation
- Asset Attributes and Management
- Asset Reliability and Availability
- Service Entitlements

Foundation

- Case and Work Order Management
- Account and Contract Management
- Appointment Booking and Insights
- Predictive Job Duration
- EU Operating Zone
 - Several features with [GA] releases throughout '24
- High Volume Priming
- Document Builder [Beta]

NOTE: Features vastly outnumber the amount listed here and new features are continuously added; Salesforce's [forward-looking statement](#) applies to features marked Pilot, Beta, and GA.

Legend

Pilot: Testing involving a group of users prior to deployment

Beta: Testing of the product in the user environment

GA: General availability

Salesforce Field Service as a Replacement for FSE: Platform Capabilities

As mentioned earlier in this guide, one of the biggest differentiators between FSE and Salesforce Field Service (SFS) is that it functions as a top-rated SaaS platform.

What does this mean exactly? It's built to integrate easily with other technology (e.g., your ERP, HRIS, asset management, inventory management, revenue/billing, etc.), either directly or via middleware, to eliminate the problems associated with having disparate data and systems. This type of architecture makes it easier to scale and tailor usage of tools and data.

It provides a consolidated way for users to access the tools and information they need, while allowing organizations to accurately connect the dots when it comes to their customers and operations – for data-driven decisions and improvements across all areas of business.

This type of solution is:

- More sustainable and secure from a technology and business standpoint
- Allows for better data and process visibility and control
- Can be used to improve efficiency and performance alongside the customer experience
- Provides unified data architecture for advanced insights, reporting, analytics, etc.



Salesforce Field Service as a FSE Replacement: Partner Ecosystem

Salesforce has a comprehensive ecosystem, or network of 3rd party vendor options for platform extension, known as the [AppExchange](#). This, along with ease of configurability, the number of out-of-the-box features included with SFS, Salesforce's own cross-platform products, and continuous feature releases – negates the need for the vast majority of solution customization. It's a major value add for any organization looking for more tools or functionality and faster time to value.

Our [website](#) has a selection of applications frequently used by your industry, but popular additions include (but aren't limited to):

- Youreka (smart forms, checklists, and surveys)
- Asperato (a top-rated payment app)
- TechSee (visual remote assistance)
- Conga (contract tools)
- Certinia PSA (project and resource optimization)
- Diabsolut's Material Transport (material hauling process automation, visibility and management)
- Diabsolut's SFSx (add SFS functionality for Mobile Layouts, Working Alone Timer, Dynamic Status Transitions, and more)

Salesforce products relevant to field service organizations that can be used to extend platform functionality and consolidate vendors, include (but aren't limited to):

- Revenue Cloud (CPQ and Billing)
- Energy & Utilities Cloud (industry-specific tools and configuration)
- Einstein for Service (services-focused AI and generative AI)
- Marketing Cloud (marketing tools, management, and automation)
- MuleSoft (middleware for expedited integrations)
- Experience Cloud (contractor/customer portals)
- Sales Cloud (sales tools, management, and automation)
- Data Cloud (data hosting and architecture which allows for improved data unification and insights)

Our Experience with ClickSoftware, Salesforce, and Salesforce Field Service

Diabsolut started off as a premier ClickSoftware field service solution implementor in 2003 (until they were acquired in 2019) and have reached Summit Level Salesforce implementation partner status. We've successfully leveraged both organizations' products to create best-in-class solutions for our clients – and have widespread, proven experience with FSE and Salesforce Field Service, as well as solution implementation and integrations.

We specialize in Salesforce and Certinia solutions, with a special focus on ClickSoftware solution migrations, and have project expertise leveraging both our own and 3rd party vendor platform extensions to ensure clients receive a value-driven, user-friendly, efficient solution that has been optimized for their organization's specific needs.

Our team has the in-depth knowledge and tools needed to address complex pain points and industry-specific requirements, which we can use to translate your field service needs into a value-driven FSE replacement, including a precise scope and evaluation of the effort and timing needed to transition.

If after your assessment you determine Salesforce Field Service is the right replacement for your organization, next steps will include a combination of:

- Collaboration
- Best practices
- And lessons learned during our extensive experience with ClickSoftware to Salesforce Field Service solution migrations, across numerous field service industries



FSE Migration Services and Support

Our detailed knowledge of ClickSoftware FSE gives us the ability to review your existing solution and create a base configuration (Schema, Logic, General Events, and Screen Layouts) in Salesforce Field Service that will reduce the impact on your team. The proprietary migration tools we've developed will help expedite the process, while saving time and resources.

While our background and end-to-end solution expertise mean that every project results in accelerated time to value, we know that time, budget, resource availability, and an organization's unique challenges and needs will impact the way they approach solution migration. We offer various migration approaches and delivery methods (waterfall, agile, and hybrid) to better meet an individual organization's needs.

Regardless of where you are in your planning or migration process, we can help. Please don't hesitate to reach out for answers or support, with no obligations.

Our targeted migration advice and services include (but aren't limited to):

- Clarity on the Effort and Timing Required to Transition
- Organizational Readiness Assessments
- Change and Training Analysis and Impacts
- Data Migration Approach and Systems Integration Planning
- End-to-End Solution Optimization, Planning, and Roadmaps
- Salesforce Field Service Best Practices

Additionally, we offer [packaged services for solution optimization](#) based on the knowledge we've accumulated throughout our decades of experience in field service – and are constantly evolving our skills to provide industry-specific, platform-level tailoring to improve your solution's functionality and ROI.

What to expect with your Diabsolut FSE migration:

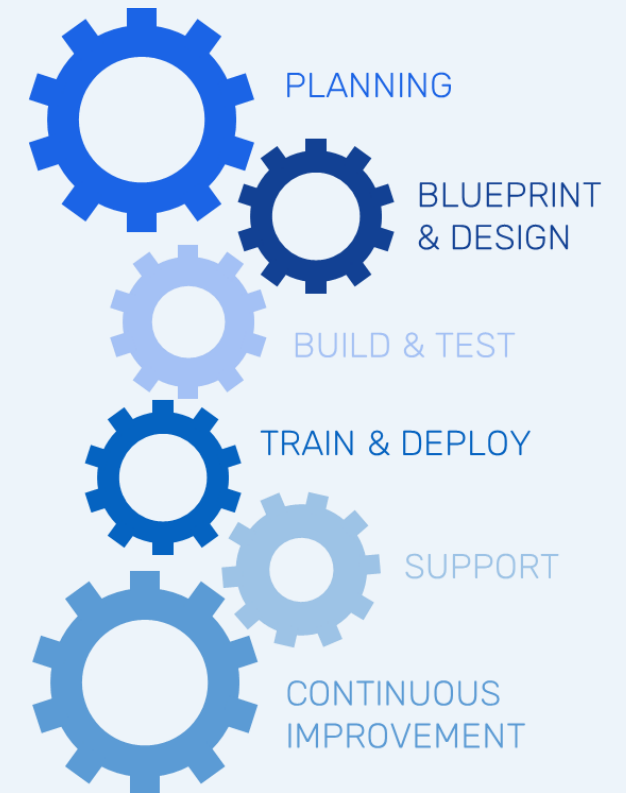
- Migration automation tools and rapid prototyping to streamline and speed up migration processes
- Use of out-of-the-box solution functionality whenever possible
- Consultants with firsthand field service experience
- A deep understanding of industry benchmarks and best practices
- Solutions designed for both efficiency and user engagement
- Transparency, clear communication, and no surprises

If your organization would like to extend their new solution's functionality in a fast and scalable way, we can help with that too.

We have [several user-friendly applications](#) that work through Salesforce Field Service to quickly and easily address common industry pain points – including:

- Our Material Transport App
- Our SFS-X App (available on a feature-by-feature basis)
 - Features include the Working Alone Timer, Mobile Layout, and Dynamic Status Transitions

Diabsolut Delivery Model



Resources

Blogs

- [Top Tips for a Successful Software or Technology Implementation](#)
- [The Salesforce Field Service Partner Advisory Board: What it is and How it Adds Value for Our Clients](#)
- [Salesforce Data Security: Answers to Our Clients' Top 3 Questions](#)
- [Mobile Field Service Solution Optimization: Healthy vs. Good Enough](#)
- [Using Apps and Technology to Increase Your Salesforce Solution's ROI](#)

Brochures

- [ClickSoftware FSE EOL](#)
- [Enterprise Integration Experience](#)
- [The Rolling Warehouse™](#)
- [PSA and Time-of-Day Scheduling](#)

Platform as a Service (PaaS)

- Article: [PaaS](#)

Websites

- [Diabsolut](#)
- [Salesforce](#)
- [Certinia](#)

Salesforce

- [Salesforce Field Service Spring '24 Release Notes](#)

Miscellaneous

- Wiki Cloud: [ClickSoftware Product Lifecycle Policy](#)
- Announcement: [ClickSoftware has joined the Salesforce family](#)
- [Salesforce Trust](#)

About the Author



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Account Executive

Stephen has delved into many roles over the years, from development and professional services, to solutions consulting, and Account Executive. Leveraging his technical expertise and solutioning adaptability to find a path forward within all his engagements, while similarly guiding his team.

He is an expert in processes and best practices – leveraging insight from industries such as Energy & Utilities, Healthcare, Home Services, Telecom, Manufacturing, and High Tech – to support Diabsolut’s customers in their evaluation and selection of Service solutions.

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About Diabsolut

As Salesforce Consulting Experts, we offer innovative end-to-end customer service and asset centric solutions to address the business needs of organizations across many industries throughout North America. Our expertise is in Field Service, Asset Management and Revenue. We work closely with our customers to ensure they achieve success and deliver exceptional service, by giving them the best tools for the job.