Track Your Team's Expenses

Create expenses linked to work orders. From duct tape to travel costs, your team can keep track of expenses

- Expense management is now part of work orders via Expenses related list on work order and on the work order in the mobile app.

Save Clicks in the Dispatcher Console

Work smarter and faster in the appointment list in the dispatcher console. Select appointments from different views and open the selected list with a single click. Hover over appointments and view details, or add icons that communicate information visually.

- There have been improvements to the dispatcher console including a separate list of all selected appointments, hover for additional details on the appointment list, and displaying of formula field icon in appointment list.
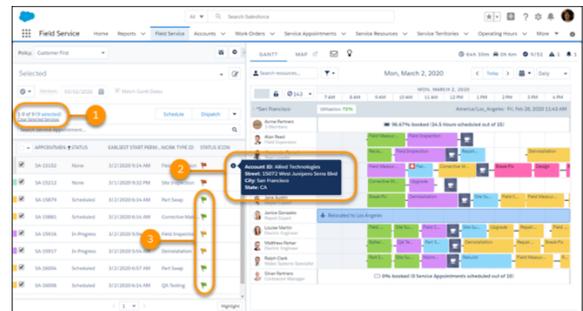
Track Asset Availability and Reliability

Capture details of an asset's expected availability, and planned and unplanned maintenance. Then define a reporting period to view information on cumulative downtime, cumulative unplanned downtime, availability, and reliability to keep things running smoothly.

- Assets can now track availability & reliability which aggregates planned & unplanned maintenance on a separate, reportable object.

Manage Loads for Your Trucks and Workers

To limit assignments, daily work hours, and how much workers can transport, add Count work rules to a scheduling policy. You can assign light workloads to new-hires, or track item quantities that fit in each worker's vehicle.

- Salesforce has introduced additional constraints to limit the number of hours a resource can work, transport in a van, or the number of appointments one can take.

Bring Results into Focus with Optimization Insights (Beta)

Learn at a glance how global optimization affects your KPIs. When you tweak a scheduling policy and optimize the schedule, you can see if the change lowers travel times or improves utilization. A results snapshot shows metrics before and after the optimization.

- After making updates to a scheduling policy Salesforce provides a snapshot of KPIs & results of the optimization before & after the updates.

Take Scheduling Challenges in Stride

Enhanced optimization makes it painless to respond to last-minute changes and build schedules that align with KPI goals. Previously, to access in-day optimization, predictive travel, and scheduling recipes, you activated enhanced optimization. We're now phasing in this flavor of optimization as the default method.

- Enhanced optimization is now the default optimization method.
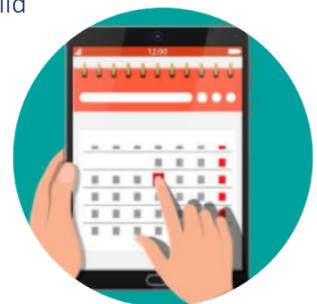
Get Improved Shift Management (Beta)

Managing shifts in the schedule view is easier than ever. Shifts that span multiple days have a new look, so it's easier to identify availability. Quickly search for shifts, then hover over one to make updates using the available actions. And, your team can change what they see by choosing fields and ordering them in the list view.
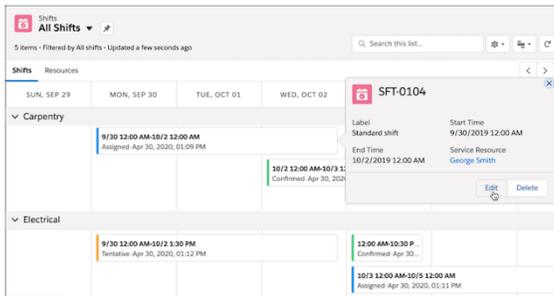

- Improved shift management including multi-day shifts, more actions to edit shifts from the calendar, and customizable views for users.

Customize the Gantt in More Ways

Fine-tune control over what users can see and do in the dispatcher console with optional custom permissions. For example, you can create a read-only view of the Gantt for service managers. Or, configure which users can drag appointments from the list or map to the Gantt.

- Users can have a read-only view of the Gantt, but still need a license.
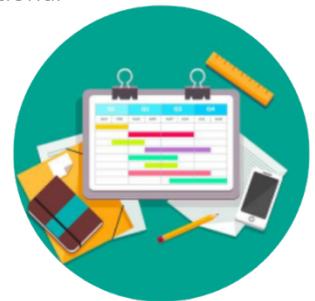
Share Maintenance Plans and Service Contracts as Needed

Apply sharing rules to maintenance plans and extend access to users in public groups, roles, or territories. Share maintenance plans based on the owner or other criteria. Also, share Service Contract records based on criteria other than the service contract owner.

- Sharing rules are now available for maintenance plans and service contracts.

Use Criteria-Based Sharing Rules for Time Sheets

Add criteria-based rules for time sheets to provide access to the right people. For example, you can create a rule that shares submitted time sheets with the accounting department or a partner manager group.

- Criteria-based sharing rules are available for time sheets.

Link Directly to Actions and Flows in the Mobile App

Save time and taps for your field service workers with URIs that launch flows and quick actions in the mobile app. For example, use a deep link to run a custom flow. You can also pass data in the URI, for example to pre-fill some fields.

- Link directly to quick actions & flows (extensions) in the mobile app.