

User Guide – Mass Recurring Non-Availabilities

End-user workflow sample for Salesforce Field Service

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Mass Recurring Non-Availabilities

Overview

Mass Recurring Non-Availabilities helps dispatchers manage Service Resource schedules by creating or removing recurring non-availability entries for multiple resources at once. It reduces repetitive manual updates and improves schedule accuracy when planned time off, training, or recurring events affect multiple resources.

What You Can Do

Use this utility to:

- **Create recurring non-availabilities for multiple service resources**
Select service territories, choose resources, and define the absence time, type, recurrence pattern, and date range.
- **Delete existing non-availabilities in bulk**
Filter absences by territory, absence type, and date range, review the results, and delete only the entries you choose.

Before You Begin

Prerequisites

- Access to the **Mass Recurring Non-Availabilities** utility from the Field Service Console.
- Ability to view and manage Service Resources and Resource Absences.

Important to note

- The Service Territories available for selection reflect your **Gantt filtering** settings.
- If absence approvals are enabled in your org, **only approved absences** may block availability and display on the Gantt.

Tip: If you don't see expected Service Resources, confirm you selected the correct Service Territory and that the resource is assigned to it.

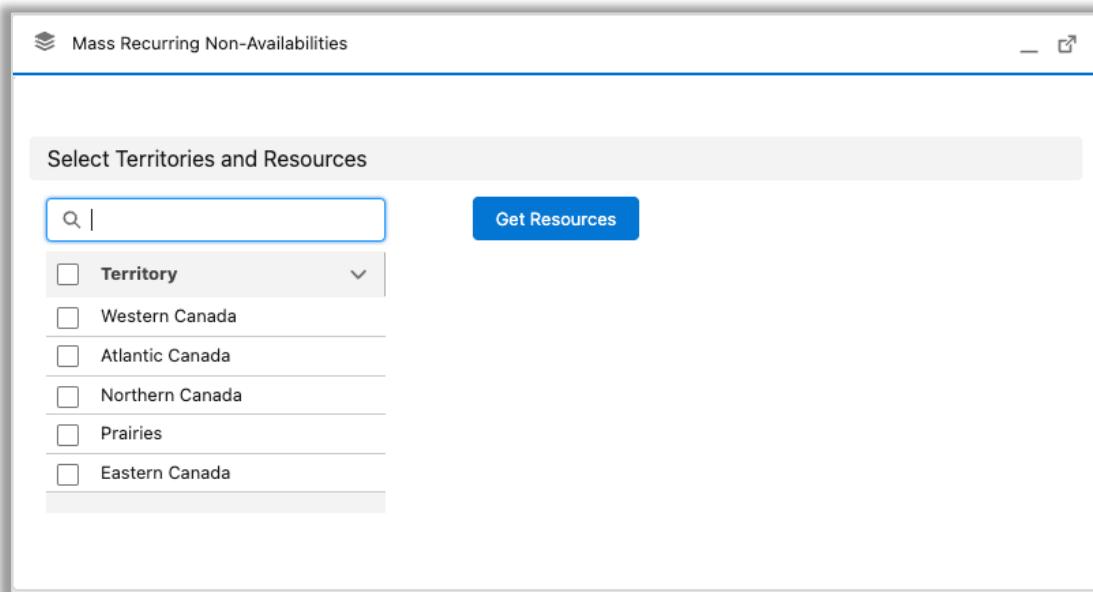
Create Recurring Non-Availabilities

Use this workflow to create a recurring series of non-availabilities for multiple Service Resources at once.

Step 1: Select Territories and Resources

1. Open the **Mass Recurring Non-Availabilities** utility.
2. Select one or more **Service Territories**.

Note: Service territories shown reflect your Gantt filtering settings. Service territories without assigned resources may still appear in the list.



3. Click **Get Resources**.
The Service Resource list displays the relevant resource names based on the Service Territories selected.

4. Select one or more **Service Resources**.

The screenshot shows a user interface for selecting territories and resources. At the top, there's a header bar with the title "Mass Recurring Non-Availabilities". Below it is a search bar and a "Get Resources" button. The main area is divided into two sections: "Select Territories and Resources" on the left and "Create or Delete Resource Absence" on the right.

Select Territories and Resources:

- Search bar:
- Filter dropdown: Territory
- List of Territories:
 - Western Canada
 - Atlantic Canada
 - Northern Canada
 - Prairies
 - Eastern Canada
- Get Resources button
- Search bar:
- Filter dropdown: Resource
- List of Resources:
 - Technician 1
 - Technician 2
 - Demo Dispatcher 2
 - Technician 3

Create or Delete Resource Absence:

- Create Resource Absence
- Delete Resource Absence

5. Select **Create Resource Absences**.

The screenshot shows a user interface for creating resource absences. At the top, there's a header bar with the title "Mass Recurring Non-Availabilities". Below it is a search bar and a "Get Resources" button. The main area is divided into two sections: "Create or Delete Resource Absence" on the left and "Absence Time" on the right.

Create or Delete Resource Absence:

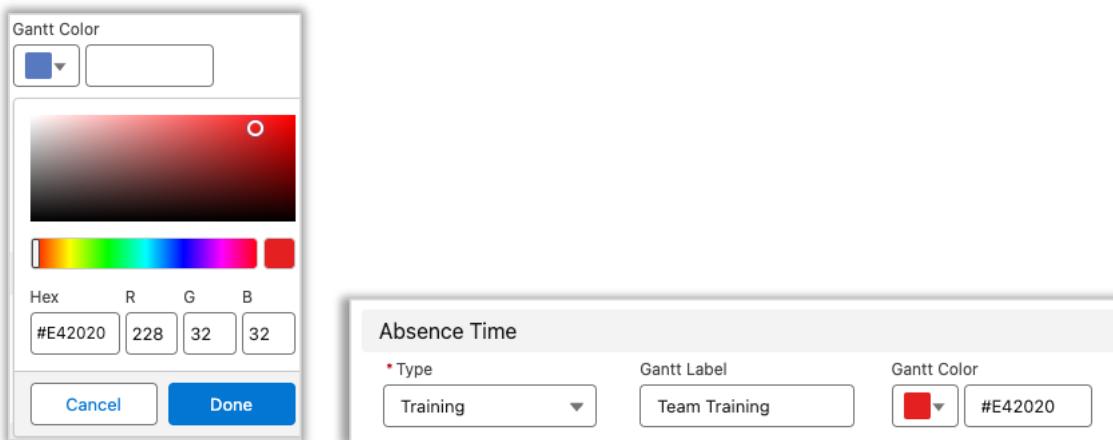
- Create Resource Absence
- Delete Resource Absence

Absence Time:

* Type: Meeting	Gantt Label: <input type="text"/>	Gantt Color: <input type="color"/>
* Start time: 12:00:00 p.m. <input type="button" value=""/>	* Finish time: 12:30:00 p.m. <input type="button" value=""/>	Time zone: (GMT-04:00) Eastern Daylight Time (America/New... <input type="button" value=""/>

Step 2: Enter absence time details

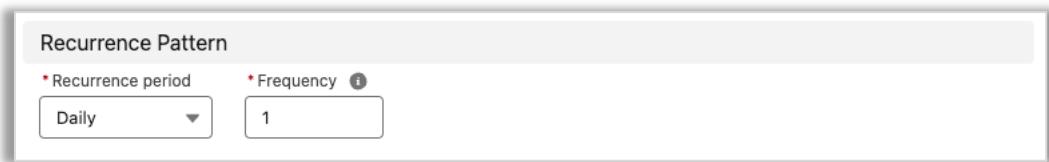
1. In the **Absence Time** section, select an **Absence Type**.
The values available depend on your organization's configuration.
2. Select a **Start Time** and **Finish Time**.
Define the time range for each absence event.
3. Enter a **Gantt label (Optional)**
Enter a label to display on the Gantt (for example, **Company Meeting**).
If left blank, the absence type displays.
4. Select a **Gantt Color (Optional)**
Select a color to apply to all absences in the series.



5. Select a **Time Zone (Optional)**
By default, the utility uses your time zone. Resource absences display based on the viewing user's time zone, but you can select a different time zone to simplify creation.

Step 3: Configure recurrence

1. In the **Recurrence Pattern** section, select a **Recurrence Period**:
 - a. Daily
 - b. Weekly
 - c. Monthly
 - d. Annually



2. Configure the recurrence options based on the selected period:

a. **Weekly:** select recurrence days

The screenshot shows the 'Recurrence Pattern' dialog. The 'Recurrence period' dropdown is set to 'Weekly'. The 'Frequency' input field contains '1'. Below the frequency field is a horizontal row of seven buttons representing days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The 'Mon' button is highlighted in blue, indicating it is selected.

b. **Monthly:** choose recurrence by **Date** or **Day** (for example, *First Monday*)

The screenshot shows the 'Recurrence Pattern' dialog. The 'Recurrence period' dropdown is set to 'Monthly'. The 'Frequency' input field contains '1'. Below the frequency field are two buttons: 'Date' (highlighted in blue) and 'Day'. To the right of these buttons are dropdown menus for '10' (frequency), 'First' (occurrence), and a dropdown menu showing 'Monday'.

The screenshot shows the 'Recurrence Pattern' dialog. The 'Recurrence period' dropdown is set to 'Monthly'. The 'Frequency' input field contains '1'. Below the frequency field are two buttons: 'Date' and 'Day' (highlighted in blue). To the right of these buttons are dropdown menus for 'First' (occurrence) and a dropdown menu showing 'Monday'.

c. **Annually:** choose recurrence by **Date** or **Day** (for example, *First Wednesday of March*)

The screenshot shows the 'Recurrence Pattern' dialog. The 'Recurrence period' dropdown is set to 'Annually'. The 'Frequency' input field contains '1'. Below the frequency field are two buttons: 'Date' (highlighted in blue) and 'Day'. To the right of these buttons are dropdown menus for 'January' (month) and '1' (day).

The screenshot shows the 'Recurrence Pattern' dialog. The 'Recurrence period' dropdown is set to 'Annually'. The 'Frequency' input field contains '1'. Below the frequency field are two buttons: 'Date' and 'Day' (highlighted in blue). To the right of these buttons are dropdown menus for 'First' (occurrence), 'Wednesday' (day), 'Month' (dropdown menu), and 'March' (month).

3. Enter the **Frequency**.

Example: If you select **Weekly** and enter a frequency of **2**, the absence occurs every **two weeks**.

Step 4: Set the recurrence range and create records

1. In the **Range of Recurrence**, select a **Start Date**.
2. Select an end option:
 - a. **End by** (choose an end date), or
 - b. **End after** (enter the number of occurrences)

Range of Recurrence

* Start: May 23, 2024

End by End after

Range of Recurrence

* Start: May 23, 2024

End by End after

* Occurrences: No.

3. Click **Create**.
The utility creates individual Resource Absence records based on your recurrence settings.

Absence Time

* Type: Training

Gantt Label: Team Training

Gantt Color: #E42020

* Start time: 2:00:00 p.m.

* Finish time: 2:30:00 p.m.

Time zone: (GMT-04:00) Eastern Daylight Time (America/New...

Recurrence Pattern

* Recurrence period: Monthly

* Frequency: 1

Date Day Second Wednesday

Range of Recurrence

* Start: May 23, 2024

End by End after

Dec 31, 2024

Address

Result: Records created

When you click **Create**, the utility generates:

- A Recurring Resource Absence record (the parent series record)
- Individual Resource Absence records (one per occurrence)

Each Resource Absence record is linked to its parent series record.

To review the absences created:

1. Open the Recurring Resource Absence record.
2. In the Resource Absences related list, click View All to see the full set of child records.

Note: The Recurring Resource Absence record is automatically deleted after all related Resource Absence records in the series have been deleted.

Example: Resource Absence records created

	Absence Number ↑ ↓	Resource ↑ ↓	Type ↑ ↓	Start Time ↑ ↓	End Time ↑ ↓	Record Type ↑ ↓	Gantt Label
39	<input type="checkbox"/> RA-115283	Santosh Tech	Meeting	2024-07-31, 9:00 a.m.	2024-07-31, 12:00 p.m.	Non Availability	Team Meeting
40	<input type="checkbox"/> RA-115286	Vruti	Meeting	2024-05-22, 9:00 a.m.	2024-05-22, 12:00 p.m.	Non Availability	Team Meeting
41	<input type="checkbox"/> RA-115287	Vruti	Meeting	2024-05-29, 9:00 a.m.	2024-05-29, 12:00 p.m.	Non Availability	Team Meeting
42	<input type="checkbox"/> RA-115288	Vruti	Meeting	2024-06-05, 9:00 a.m.	2024-06-05, 12:00 p.m.	Non Availability	Team Meeting
43	<input type="checkbox"/> RA-115289	Vruti	Meeting	2024-06-12, 9:00 a.m.	2024-06-12, 12:00 p.m.	Non Availability	Team Meeting
44	<input type="checkbox"/> RA-115290	Vruti	Meeting	2024-06-19, 9:00 a.m.	2024-06-19, 12:00 p.m.	Non Availability	Team Meeting
45	<input type="checkbox"/> RA-115291	Vruti	Meeting	2024-06-26, 9:00 a.m.	2024-06-26, 12:00 p.m.	Non Availability	Team Meeting
46	<input type="checkbox"/> RA-115292	Vruti	Meeting	2024-07-03, 9:00 a.m.	2024-07-03, 12:00 p.m.	Non Availability	Team Meeting
47	<input type="checkbox"/> RA-115293	Vruti	Meeting	2024-07-10, 9:00 a.m.	2024-07-10, 12:00 p.m.	Non Availability	Team Meeting
48	<input type="checkbox"/> RA-115294	Vruti	Meeting	2024-07-17, 9:00 a.m.	2024-07-17, 12:00 p.m.	Non Availability	Team Meeting
49	<input type="checkbox"/> RA-115295	Vruti	Meeting	2024-07-24, 9:00 a.m.	2024-07-24, 12:00 p.m.	Non Availability	Team Meeting
50	<input type="checkbox"/> RA-115296	Vruti	Meeting	2024-07-31, 9:00 a.m.	2024-07-31, 12:00 p.m.	Non Availability	Team Meeting
51	<input type="checkbox"/> RA-115297	Sai	Meeting	2024-05-08, 9:00 a.m.	2024-05-08, 12:00 p.m.	Non Availability	Team Meeting
52	<input type="checkbox"/> RA-115298	Sai	Meeting	2024-05-15, 9:00 a.m.	2024-05-15, 12:00 p.m.	Non Availability	Team Meeting

Delete Resource Absences

Use this option to delete multiple Resource Absence records across many service resources at once. This is helpful when an event is cancelled or a recurring schedule changes.

Step 1: Select Service Territories and Service Resources

1. Open the **Mass Recurring Non-Availabilities** utility.
2. Select one or more **Service Territories**, then click **Get Resources**.
A list of service resources, filtered by service territories, displays.
3. Select one or more **Service Resources**
4. Select **Delete Resource Absence**.

The screenshot shows the 'Mass Recurring Non-Availabilities' utility window. At the top, there's a search bar and a 'Get Resources' button. Below that, the 'Select Territories and Resources' section contains two dropdown menus. The left dropdown is set to 'Territory' and lists 'Western Canada', 'Atlantic Canada', 'Northern Canada', 'Prairies', and 'Eastern Canada', all of which have checkboxes checked. The right dropdown is set to 'Resource' and lists 'Technician 1', 'Technician 2', 'Demo Dispatcher 2', and 'Technician 3', also with checkboxes checked. At the bottom, the 'Create or Delete Resource Absence' section has two radio buttons: 'Create Resource Absence' (unchecked) and 'Delete Resource Absence' (checked).

Step 2: Find absences to delete

1. In the **Find Absences** section, set your search criteria:
 - a. **Absence Type**
Select one, many, or all absence types.
 - b. **Start Date and End Date**
Select a date range to retrieve absences for deletion.

The screenshot shows the 'Find Absences' search interface. It includes a search bar, a dropdown menu for 'Absence Type' (with 'Meeting' checked), date selection fields for 'Start Date' (May 1, 2024) and 'End Date' (Jul 1, 2024), and a prominent blue 'Display' button at the bottom.

2. Click **Display**.

The results table lists the resource absence records that match your criteria.

Example: Selecting *Meeting* absences between May 1, 2024, and July 1, 2024, will return all matching records for the selected resources during that period.

The screenshot shows a results table with the following data:

Service Resource Name	Absence Type	Start Date	End Date	Gantt Label	Absence Number	Recurring RA
Suri	Meeting	05/01/2024, 2:00 PM	05/01/2024, 3:00 PM	Compare Dates	RA-115217	RRA0658
Suri	Meeting	05/02/2024, 2:00 PM	05/02/2024, 3:00 PM	Compare Dates	RA-115218	RRA0658
Suri	Meeting	05/03/2024, 2:00 PM	05/03/2024, 3:00 PM	Compare Dates	RA-115219	RRA0658
Suri	Meeting	05/08/2024, 10:00 AM	05/08/2024, 1:00 PM	Team Meeting	RA-115245	RRA0659
Suri	Meeting	05/15/2024, 10:00 AM	05/15/2024, 1:00 PM	Team Meeting	RA-115246	RRA0659
Suri	Meeting	05/22/2024, 10:00 AM	05/22/2024, 1:00 PM	Team Meeting	RA-115247	RRA0659

Delete

Step 3: Delete selected records

1. Review the results
Use the search/filter controls to further narrow the list if needed.
2. Select the records you want to delete, then click **Delete**.

A confirmation message indicates how many records were successfully deleted.

Delete Resource Absences from a recurring series

You can also delete Resource Absence records directly from the parent **Recurring Resource Absence** record. This method is useful when you want to review and manage absences that were created as part of a specific recurring series.

Note: Due to Salesforce limitations, you can delete a maximum of **200** records at a time.

1. Open a **Recurring Resource Absence** record.
2. Go to the **Resource Absences** related list.
3. Click **View All**.

Resource	Absence Number	Type	Start Time
Technician 1	RA-0917	Training	2025-01-12, 6:30 p.m.
Technician 1	RA-0918	Training	2026-01-12, 6:30 p.m.
Dispatcher 1	RA-0919	Training	2025-01-12, 6:30 p.m.
Dispatcher 1	RA-0920	Training	2026-01-12, 6:30 p.m.
Technician 2	RA-0921	Training	2025-01-12, 6:30 p.m.
Technician 2	RA-0922	Training	2026-01-12, 6:30 p.m.

4. Select one or many Resource Absence records, then click **Delete**.

Resource	Absence Number	Type	Start Time	End Time
1 <input checked="" type="checkbox"/> Technician 1	RA-0917	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
2 <input checked="" type="checkbox"/> Technician 1	RA-0918	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
3 <input checked="" type="checkbox"/> Dispatcher 1	RA-0919	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
4 <input checked="" type="checkbox"/> Dispatcher 1	RA-0920	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
5 <input checked="" type="checkbox"/> Technician 2	RA-0921	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
6 <input checked="" type="checkbox"/> Technician 2	RA-0922	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
7 <input checked="" type="checkbox"/> Dispatcher2	RA-0923	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
8 <input checked="" type="checkbox"/> Dispatcher2	RA-0924	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.

The page refreshes and the selected records are removed.

Once all Resource Absence records in the series are deleted, the parent Recurring Resource Absence record is automatically deleted.

Modify an existing recurring series

Resource Absence records generated from a recurring series **must be updated one at a time**.

If a schedule change affects the entire series (for example, a weekly meeting moving from Wednesday to Thursday), the recommended approach is to:

1. Use the mass delete option to remove the existing series occurrences.
2. Create a new recurring series using the updated schedule.