

Feature: Mass Recurring Non-Avabilities

The Mass Recurring Non-Avabilities feature is designed to improve dispatcher efficiency. This solution allows dispatchers to manage service resource schedules by streamlining the creation and deletion of recurring non-availabilities for multiple service resources at once through a single, intuitive user interface.

Key Features

Mass Creation of Recurring Non-Avabilities for Multiple Service Resources

Dispatchers can create recurring non-availabilities for multiple service resources simultaneously. The feature includes options to select and filter service resources by service territory, set start and end times, specify absence type, define recurrence patterns (daily, weekly, monthly, or yearly), and set recurrence range.

Mass Deletion of Resource Absences

Dispatchers can easily delete multiple resource absences for many service resources at once, simplifying the management of resource schedules.

Using the Mass Recurring Non-Avabilities utility, dispatchers can set criteria to retrieve specific absence records based on service territory, absence types, and date ranges, allowing them to target specific resource absence records for deletion. Through the user interface, users can review the retrieved absence records and then select/deselect records for deletion, providing granular control over the deletion process.

Workflow

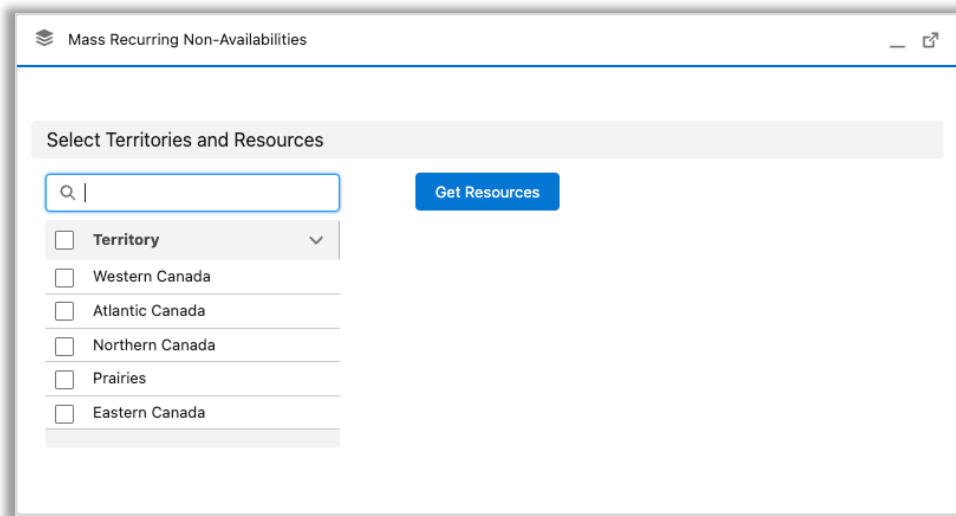
Once configured, the Mass Recurring Non-Avabilities utility is available for users within the SFS-X app or other customized Field Service lightning app.

Create Recurring Non-Avabilities for Multiple Service Resources

1. Click the Mass Recurring Non-Avabilities utility item.
2. Select one or more service territories to locate service resources by service territory.

NOTE: The service territories that are shown for selection match your Gantt filtering settings in the Field Service console. Service territories without assigned resources are

not shown in the Gantt but are shown in the selection list.



Mass Recurring Non-Avabilities

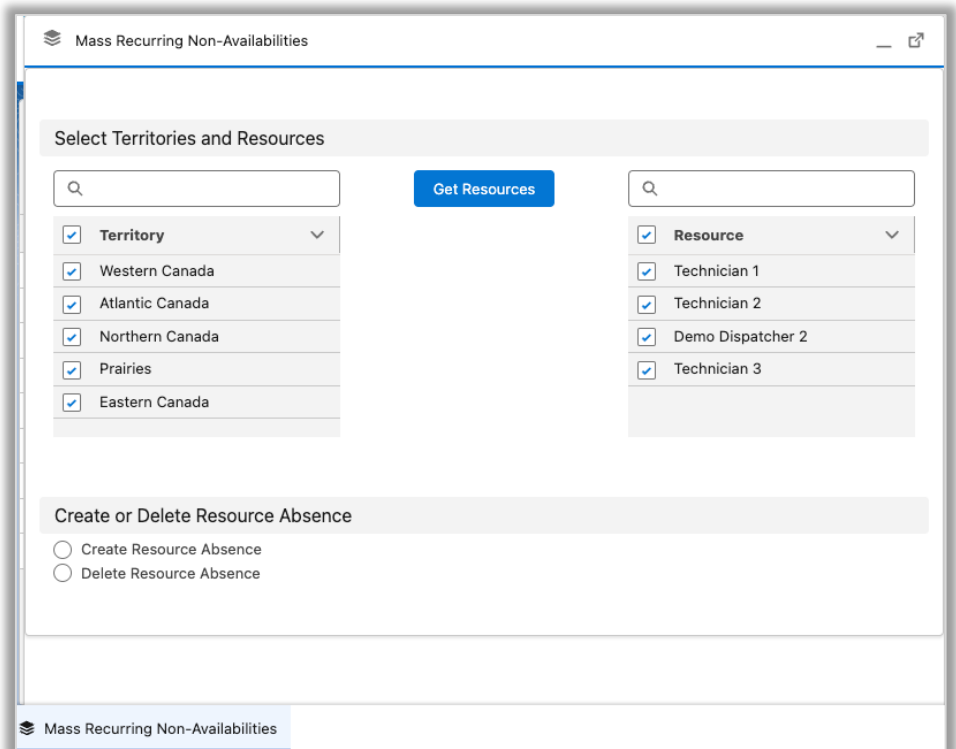
Select Territories and Resources

Search:

☐ Territory ▼

- ☐ Western Canada
- ☐ Atlantic Canada
- ☐ Northern Canada
- ☐ Prairies
- ☐ Eastern Canada

3. With service territories selected, click **Get Resources**.
The service resource list displays with the relevant resource names based on the service territories selected.
4. Select service resource names from the list. Once selected, you can now choose to either create resource absences or delete resource absences.



Mass Recurring Non-Avabilities

Select Territories and Resources

Search:

Search:

☒ Territory ▼

- ☒ Western Canada
- ☒ Atlantic Canada
- ☒ Northern Canada
- ☒ Prairies
- ☒ Eastern Canada

☒ Resource ▼

- ☒ Technician 1
- ☒ Technician 2
- ☒ Demo Dispatcher 2
- ☒ Technician 3

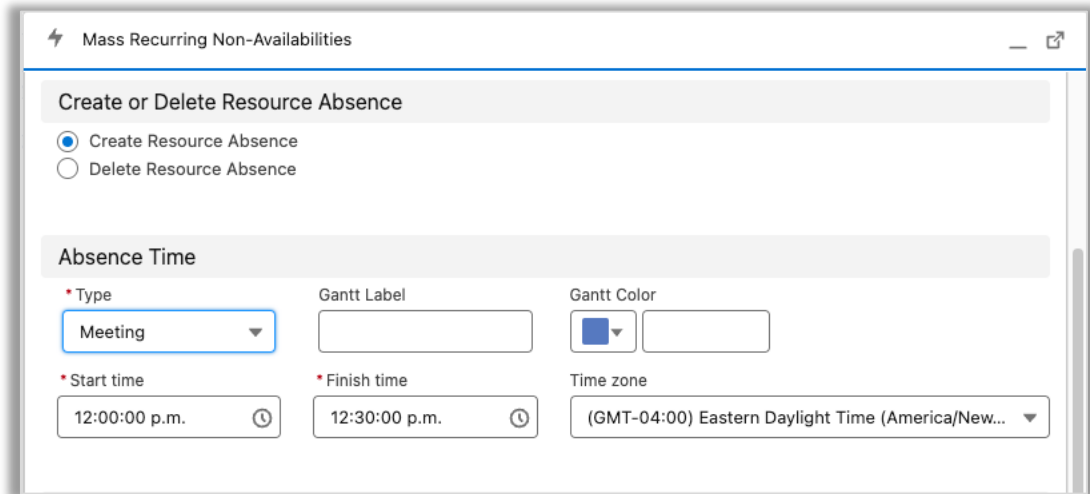
Create or Delete Resource Absence

☐ Create Resource Absence

☐ Delete Resource Absence

Mass Recurring Non-Avabilities

5. Select **Create Resource Absences**. The user interface displays sections to enter your resource absence details.
6. Enter Absence Time details.



Mass Recurring Non-Availability

Create or Delete Resource Absence

☒ Create Resource Absence
☐ Delete Resource Absence

Absence Time

* Type: Meeting (dropdown)
 Gantt Label:
 Gantt Color:

* Start time: 12:00:00 p.m. (clock icon)
 * Finish time: 12:30:00 p.m. (clock icon)
 Time zone: (GMT-04:00) Eastern Daylight Time (America/New... (dropdown))

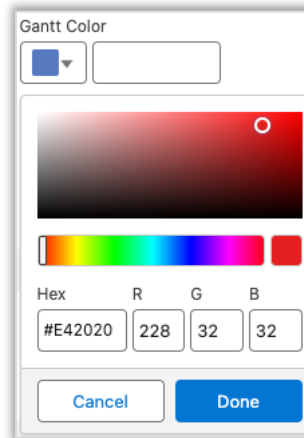
- a. Click **Absence Type** to select from the list.
 The values shown are based on your organization's configuration for the Absence Type picklist field. E.g., Meeting, Vacation, Training, Medical or any custom value your organization uses.
- b. Select a **Start Time** and **Finish Time**. This will be the time for each resource absence event.
- c. Optionally, add a **Gantt label**.

The Gantt label appears on the non-availability absence in the Gantt. For example, Company Meeting or Field Training. If a label is not entered, the absence type (Meeting, Vacation, Training) displays.

NOTE: If approval confirmation is enabled, only approved absences can block a mobile worker's availability and appear on the Gantt. Unapproved absences aren't considered in scheduling or shown on the Gantt.

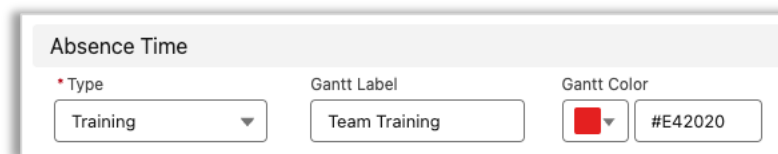
- d. Optionally, select a **Gantt Color**.

Click the color picker to select a color from the palette. The Hex value will automatically populate. The Gantt Color field for all Resource Absence records created in the series will populate with the hex value.



Gantt Color

Color selection interface showing a gradient bar, a color bar, and input fields for Hex, R, G, and B values. The Hex value is #E42020, R is 228, G is 32, and B is 32. Buttons for Cancel and Done are at the bottom.



Absence Time

Type: Training

Gantt Label: Team Training

Gantt Color: #E42020

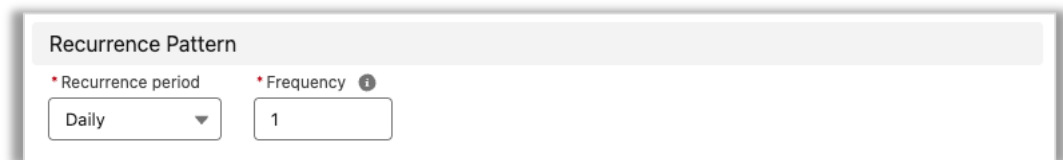
- e. If needed, change the Time Zone.

By default, the Time Zone selected is your time zone. Resource absence records will always display time adjusted to the viewing users time zone, however, in cases where you want to specify another time zone for ease of creation, you can change the time zone in the Time Zone field.

7. Set the Recurrence Pattern:

- a. Click **Recurrence Period** and select either Daily, Weekly, Monthly, or Annually from the list.

The associated recurrence options display based on your selection.



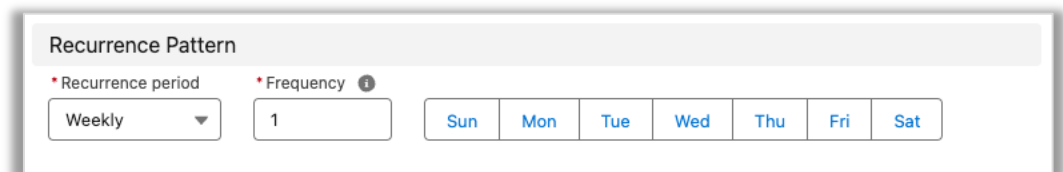
Recurrence Pattern

Recurrence period: Daily

Frequency: 1

- b. Set the relevant options for the desired recurrence pattern.

When Weekly is selected, you must set the recurrence days for the absence.



Recurrence Pattern

Recurrence period: Weekly

Frequency: 1

Sun Mon Tue Wed Thu Fri Sat

When Monthly is selected, you can set the recurrence by Date or Day, e.g. repeat every *First Monday*.

Recurrence Pattern

* Recurrence period: Monthly ▼

* Frequency ⓘ: 1

Date Day 10 ▼

Recurrence Pattern

* Recurrence period: Monthly ▼

* Frequency ⓘ: 1

Date Day First ▼ Monday ▼

When Annually is selected, you can set the recurrence by Date or Day, e.g. repeat every *First Wednesday of March*.

Recurrence Pattern

* Recurrence period: Annually ▼

* Frequency ⓘ: 1

Date Day January ▼ 1 ▼

Recurrence Pattern

* Recurrence period: Annually ▼

* Frequency ⓘ: 1

Date Day First ▼ Wednesday ▼

Month March ▼


- c. Enter a **Frequency** value.

The value entered is how frequently the resource absence occurs during the selected range of recurrence. For example, if you select “Weekly” as the recurrence period and enter a frequency of 2, the absence occurs every 2 weeks.


8. Set the Range of Recurrence:

- Click **Start Date** to select a date from the calendar.
- Select an end option, either End by and set an End date or End after and enter a value to end the recurring absences after the specified number of occurrences.

Range of Recurrence

* Start: May 23, 2024 

☒ End by ☐ End after

End date 

Range of Recurrence

* Start

May 23, 2024

☐ End by

☒ End after

* Occurrences

No.

9. Once all recurring resource absence options are set, click **Create** or click Cancel to reset the form.

The relevant number of individual non-availability resource absence records are created.

Mass Recurring Non-Availabilities

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

Cancel

Create

1.877.341.3227

www.diabsolut.com

support-sfs-x@diabsolut.com

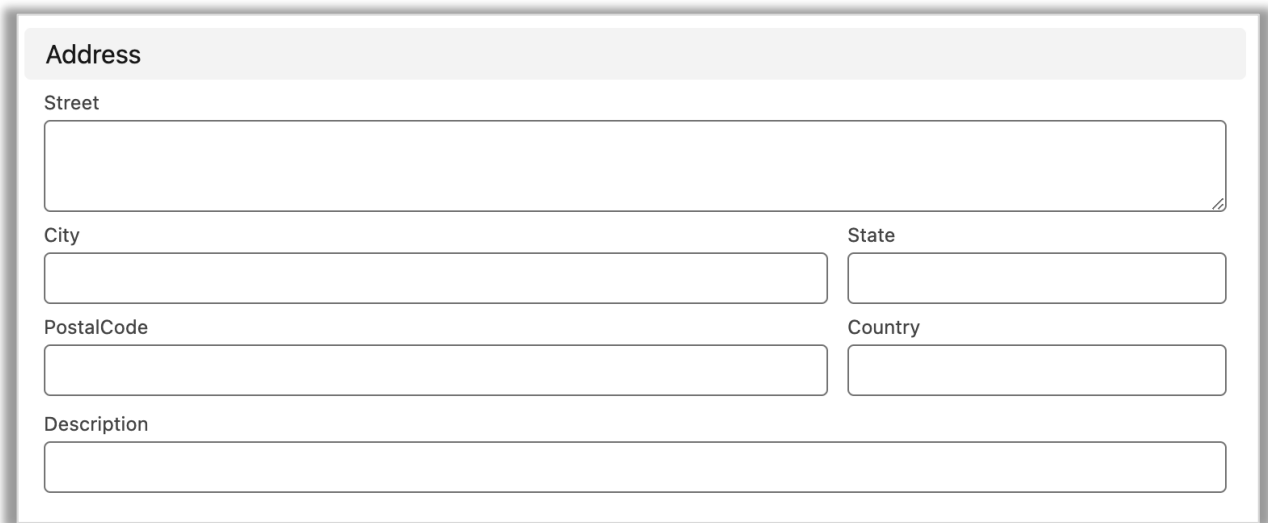
Including an Address

The Mass Recurring Non-Availabilities utility includes a section for you to optionally enter an address such as a training location. If an address is entered, this address will populate each of the resource absence records for all service resources.

For absences that don't span an entire shift—like a morning medical appointment—the absence address is used to determine travel time to and from adjacent service appointments. Appointments aren't scheduled during dedicated travel time.

If an absence doesn't have an address, optimization uses the resource's home base to calculate travel time to the next service appointment.

For a more precise travel estimate, add an address to the resource absence. With Enhanced Scheduling and Optimization, optimization and scheduling actions use the location of the last event (Service Appointment or Resource Absence) that has a location to calculate the travel time to the next event.



The screenshot shows a form titled "Address" with the following fields:

- Street**: A large text input field.
- City**: A text input field.
- State**: A text input field.
- PostalCode**: A text input field.
- Country**: A text input field.
- Description**: A text input field.

View Recurring Resource Absence Records

When resource absence records are created using the Mass Recurring Non-Availabilities feature, a Recurring Resource Absence record is automatically created. This record represents the series. Each Resource Absence record created in the series is automatically populated with the corresponding Recurring Resource Absence record. This setup allows for efficient organization and management of absence records, ensuring clarity on which series each resource absence belongs to.

You can open the Recurring Resource Absence record to view all the individual child resource absence records created in the series in the Resource Absence related list.

NOTE: The parent Recurring Resource Absence record cannot be deleted if it contains child resource absence records. Once all child resource absence records have been deleted, the parent recurring resource absence record is automatically deleted.

Recurring Resource Absences > RRA0659
Resource Absences

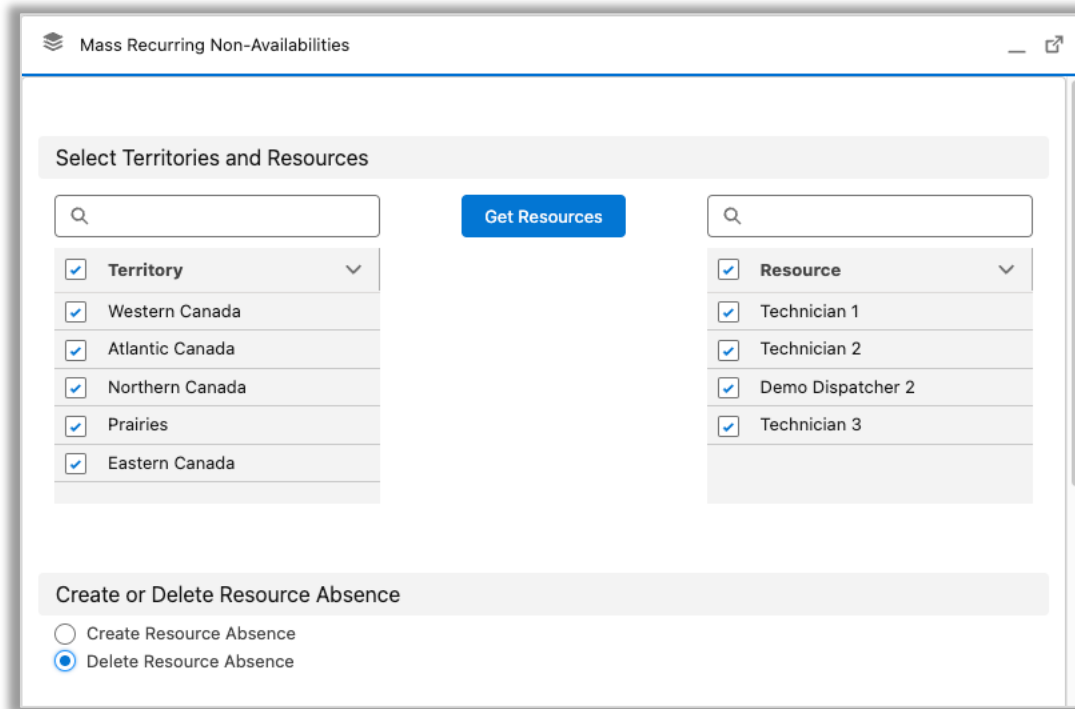
76 items • Sorted by Absence Number • Updated a few seconds ago

	<input type="checkbox"/> 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 Absence Records

To mass delete resource absences, you must first set the criteria for the records you want to retrieve.

1. Click the Mass Recurring Non-Availabilities utility item.
2. Select your service territories and click **Get Resources**.
A list of service resources, filtered by service territories displays.
3. Select the service resources for the absence records that you want to retrieve and then select **Delete Resource Absence**.



Mass Recurring Non-Availabilities

Select Territories and Resources

Search

Get Resources

Search

☒ Territory

☒ Western Canada

☒ Atlantic Canada

☒ Northern Canada

☒ Prairies

☒ Eastern Canada

☒ Resource

☒ Technician 1

☒ Technician 2

☒ Demo Dispatcher 2

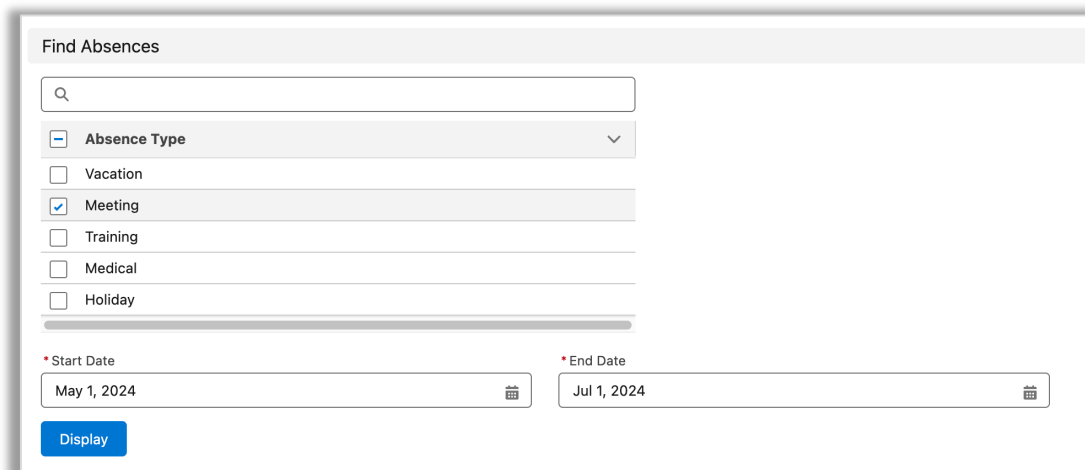
☒ Technician 3

Create or Delete Resource Absence

☐ Create Resource Absence

☒ Delete Resource Absence

- In the Find Absences section, select **Absence Type** from the list. You can select one, many, or all.



Find Absences

Search

☒ Absence Type

☐ Vacation

☒ Meeting

☐ Training

☐ Medical

☐ Holiday

* Start Date

May 1, 2024

* End Date

Jul 1, 2024

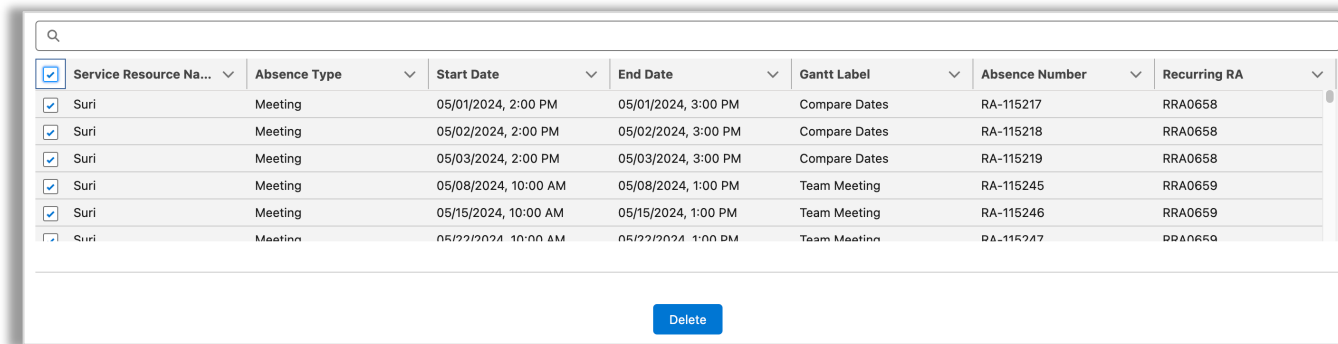
Display

- Select a **Start Date** and **End Date** to set the range for the absence resource records to retrieve.
- Once you have set the criteria for the resource absence records to retrieve, click **Display**.

The table lists the results of the retrieved resource absence records found based on the criteria you set.

In this example, all resource absence records that are Meeting absence type, between

May 1, 2024, and July 1, 2024, for all service resources will display.



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

7. Review the results. You can use the search/filter component to type criteria to further filter the results.
8. Select all records or a sub-set of the results for deletion. Once selected, click **Delete**.

A success confirmation message will display, indicating the number of records that were successfully deleted.

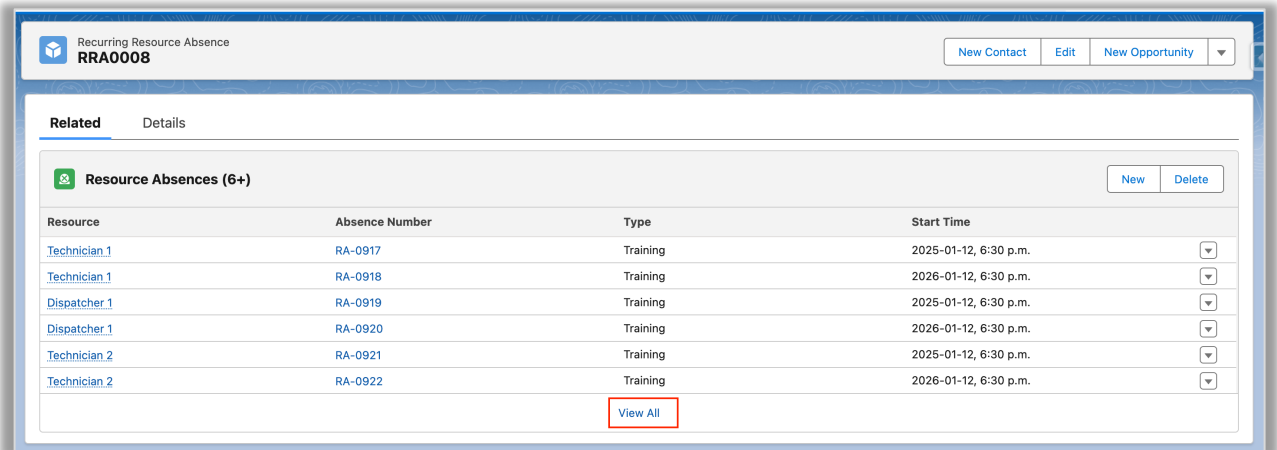
Delete Resource Absences from Recurring Resource Absence Record

With the Mass Recurring Non-Availabilities feature, you can also mass delete resource absence records from the Resource Absences related list on a parent Recurring Resource Absence record.

This functionality allows you to specifically review and target all resource absence records that were created in the series. You can sort by start time to delete all absences in the series for a specific date only or sort by resource to delete all absences in the series for a specific service resource.

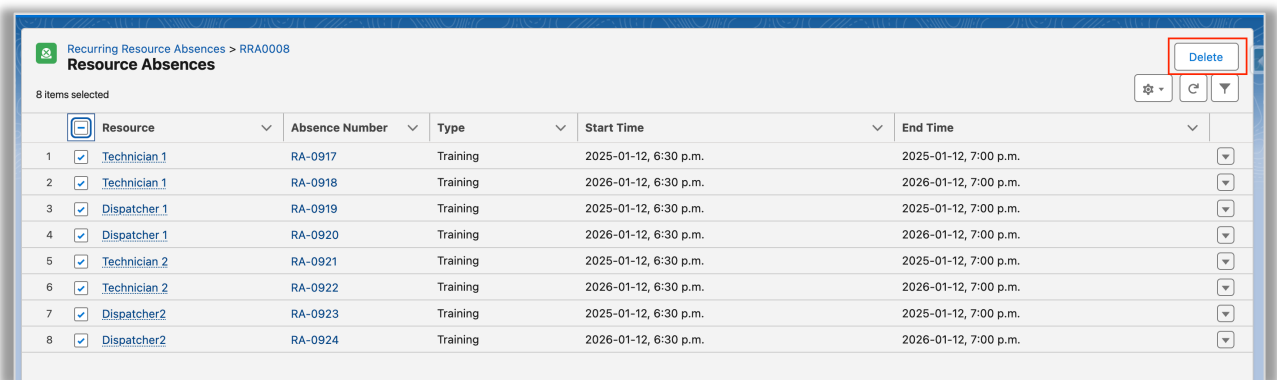
1. Open a Recurring Resource Absence record.
2. Navigate to the Resource Absences related list.

- Click **View All** at the bottom of the displayed list.



You can now select all or many resource absence records that were created in the series.

- Once the desired records are selected, click **Delete**.



A confirmation message will display, and the view refreshed. The selected records deleted.

NOTE: Due to Salesforce limitations, you can only select and delete 200 records at a time. Once all resource absence records are deleted in the series, the parent Recurring Resource Absence record is automatically deleted.

Modify Resource Absence Records

If you need to modify the series of recurring absences, you can only modify them one at a time. For example, if a regularly scheduled team meeting occurs every Wednesday, and now that meeting occurs every Thursday, you must use the mass deletion option to delete the absences and then create new recurring absences.