

User Guide – Mass Recurring Non-Availabilities

End-user workflow sample for Salesforce Field Service

Table of Contents

Mass Recurring Non-Availabilities	3
Overview	3
What You Can Do.....	3
Before You Begin	3
Create Recurring Non-Availabilities	4
Delete Resource Absences.....	10
Delete Resource Absences from a recurring series.....	12
Modify an existing recurring series.....	13

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.

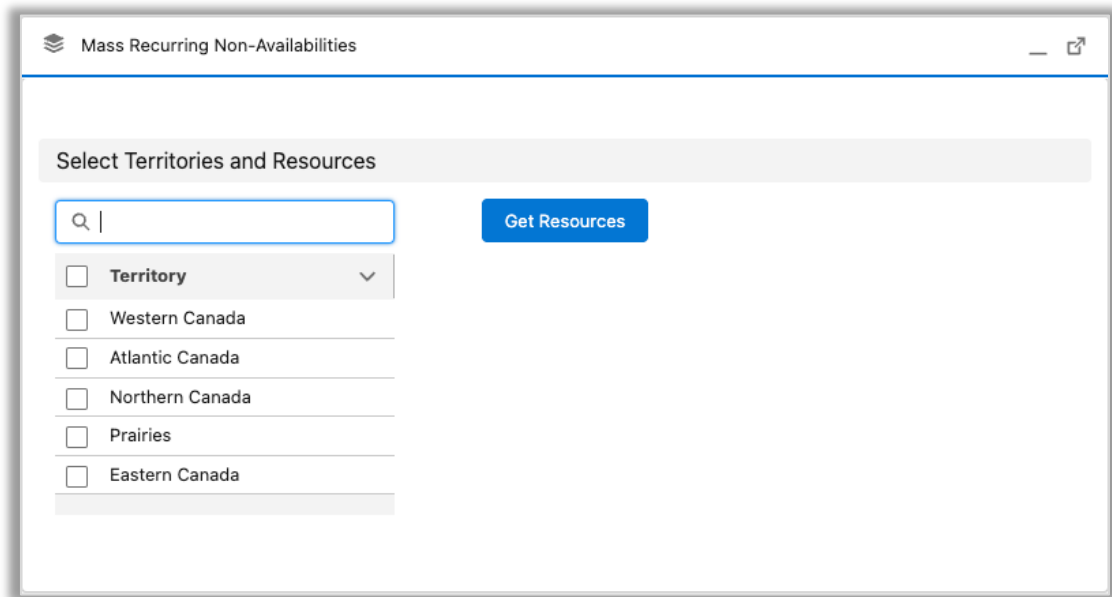
Create Recurring Non-Availabilities

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.



The screenshot shows the 'Mass Recurring Non-Availabilities' utility window. At the top, there is a title bar with the text 'Mass Recurring Non-Availabilities' and a close button. Below the title bar, there is a section titled 'Select Territories and Resources'. This section contains a search bar with a magnifying glass icon and a 'Get Resources' button. Below the search bar, there is a list of territories with checkboxes: 'Territory' (with a dropdown arrow), 'Western Canada', 'Atlantic Canada', 'Northern Canada', 'Prairies', and 'Eastern Canada'.

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 the 'Mass Recurring Non-Availabilities' window. The 'Select Territories and Resources' section is active. It features two search bars, a 'Get Resources' button, and two lists of resources. The 'Territory' list includes Western Canada, Atlantic Canada, Northern Canada, Prairies, and Eastern Canada, all with checked checkboxes. The 'Resource' list includes Technician 1, Technician 2, Demo Dispatcher 2, and Technician 3, all with checked checkboxes. Below this section, the 'Create or Delete Resource Absence' section has two radio buttons: 'Create Resource Absence' (selected) and '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

Mass Recurring Non-Availabilities

5. Select **Create Resource Absences**.

The screenshot shows the 'Mass Recurring Non-Availabilities' window. The 'Create or Delete Resource Absence' section is active. It features two radio buttons: 'Create Resource Absence' (selected) and 'Delete Resource Absence'. Below this section, the 'Absence Time' section has three fields: 'Type' (Meeting), 'Gantt Label' (empty), and 'Gantt Color' (blue). The 'Start time' field is set to 12:00:00 p.m. and the 'Finish time' field is set to 12:30:00 p.m. The 'Time zone' field is set to (GMT-04:00) Eastern Daylight Time (America/New...). The 'Type' field is a dropdown menu with 'Meeting' selected. The 'Gantt Label' field is a text input. The 'Gantt Color' field is a color picker with a blue square. The 'Start time' and 'Finish time' fields are time pickers with clock icons. The 'Time zone' field is a dropdown menu.

Mass Recurring Non-Availabilities

Create or Delete Resource Absence

☒ Create Resource Absence

☐ Delete Resource Absence

Absence Time

Type

Meeting

Gantt Label

Gantt Color

Start time

12:00:00 p.m.

Finish time

12:30:00 p.m.

Time zone

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

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.

A dialog box titled "Gantt Color" with a color picker. It includes a small color swatch at the top left, a large color gradient area, a horizontal rainbow color bar, and input fields for Hex (#E42020), R (228), G (32), and B (32). There are "Cancel" and "Done" buttons at the bottom.

A configuration panel titled "Absence Time" with three sections: "Type" (a dropdown menu showing "Training"), "Gantt Label" (a text input field containing "Team Training"), and "Gantt Color" (a color swatch showing red and a text input field containing "#E42020").

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

A configuration panel titled "Recurrence Pattern" with two sections: "Recurrence period" (a dropdown menu showing "Daily") and "Frequency" (a text input field containing "1").

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

- a. **Weekly:** select recurrence days

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Weekly 1 Sun Mon Tue Wed Thu Fri Sat

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

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Monthly 1 Date Day 10

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Monthly 1 Date Day First Monday

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

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Annually 1 Date Day January 1

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Annually 1 Date Day First Wednesday

Month March

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

End date

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.

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

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

 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 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. The title bar includes a menu icon, the text 'Mass Recurring Non-Availabilities', and window control icons. The main content area is divided into two sections. The top section, 'Select Territories and Resources', contains two search bars, a 'Get Resources' button, and two lists of items with checkboxes. The left list, under the heading 'Territory', includes 'Western Canada', 'Atlantic Canada', 'Northern Canada', 'Prairies', and 'Eastern Canada'. The right list, under the heading 'Resource', includes 'Technician 1', 'Technician 2', 'Demo Dispatcher 2', and 'Technician 3'. The bottom section, 'Create or Delete Resource Absence', contains two radio buttons: 'Create Resource Absence' and 'Delete Resource Absence', with the latter being selected.

Mass Recurring Non-Availabilities

Select Territories and Resources

Get Resources

☒ 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

Step 2: Find absences to delete

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

Find Absences

Search

☒ Absence Type

☐ Vacation

☒ Meeting

☐ Training

☐ Medical

☐ Holiday

* Start Date: May 1, 2024

* End Date: Jul 1, 2024

Display

- 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.

<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

Delete

Step 3: Delete selected records

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

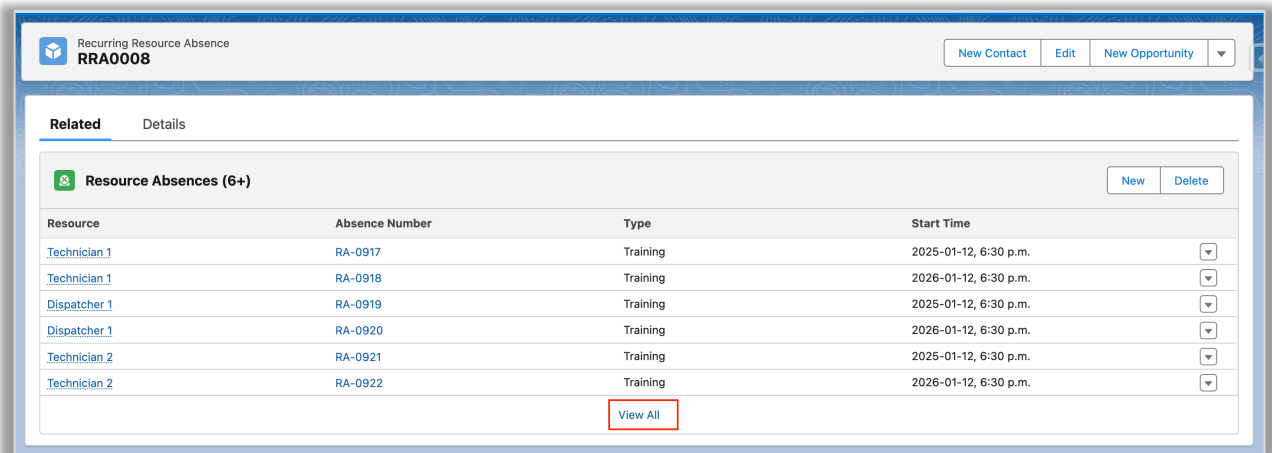
A confirmation message indicates how many records were successfully deleted.

Delete Resource Absences from a recurring series

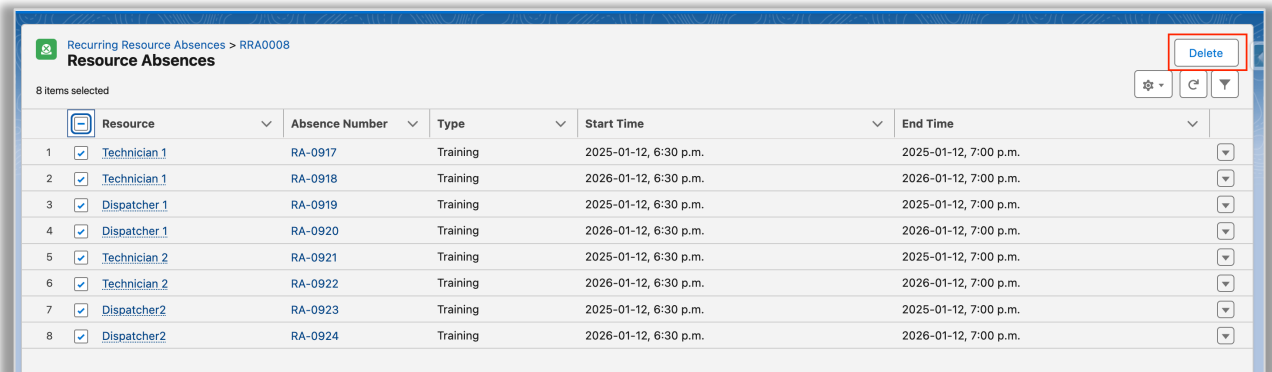
You can also delete Resource Absence records directly from the parent **Recurring Resource Absence** record. This method is useful when you want to review and manage absences that were created as part of a specific recurring series.

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**.



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



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.