



Feature: Mass Recurring Non-Availabilities

The Mass Recurring Non-Availabilities 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-Availabilities 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-Availabilities 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-Availabilities utility is available for users within the SFS-X app or other customized Field Service lightning app.

Create Recurring Non-Availabilities for Multiple Service Resources

1. Click the Mass Recurring Non-Availabilities 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.

The screenshot shows a search bar with placeholder text 'Search' and a dropdown menu set to 'Territory'. Below the dropdown is a list of service territories with checkboxes next to them:

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

A blue 'Get Resources' button is located to the right of the search bar.

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.

This screenshot shows the same interface after step 3 has been completed. The 'Territory' dropdown is still selected, but now all five service territories have checkboxes checked. To the right, the 'Resource' dropdown is selected, and it also contains five resource names, each with a checked checkbox:

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

Below the resource list, there is a 'Create or Delete Resource Absence' section with two radio button options:

- Create Resource Absence
- Delete Resource Absence



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

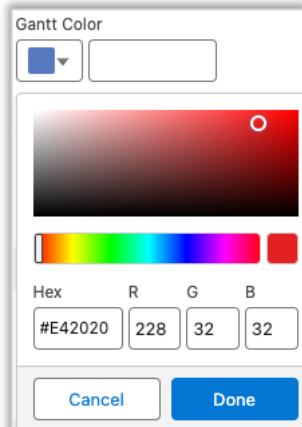
- a. Click **Absence Type** to select from the list.
The values shown are based on your organization's configuration for the Absence Type picklist field. E.g., Meeting, Vacation, Training, Medical or any custom value your organization uses.
- b. Select a **Start Time** and **Finish Time**. This will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



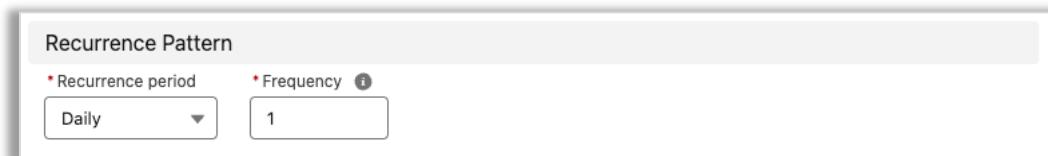
- If needed, change the Time Zone.

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:

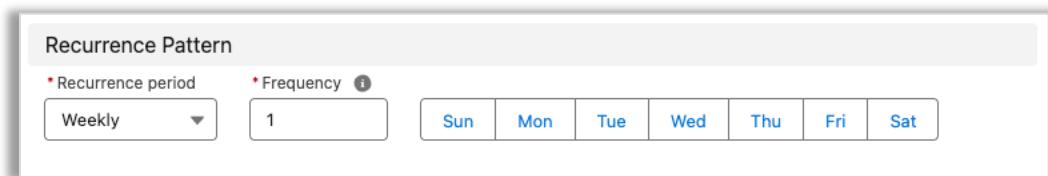
- Click **Recurrence Period** and select either Daily, Weekly, Monthly, or Annually from the list.

The associated recurrence options display based on your selection.



- Set the relevant options for the desired recurrence pattern.

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



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



Recurrence Pattern

* Recurrence period * Frequency ⓘ

Monthly 1 Date Day 10

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Monthly 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 * Frequency ⓘ

Annually 1 Date Day January 1

Recurrence Pattern

* Recurrence period * Frequency ⓘ

Annually 1 Date Day First Wednesday

Month March

- 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.

- 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 Color:

* 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

Date Day

Range of Recurrence

* Start: May 23, 2024 End by End after

Address



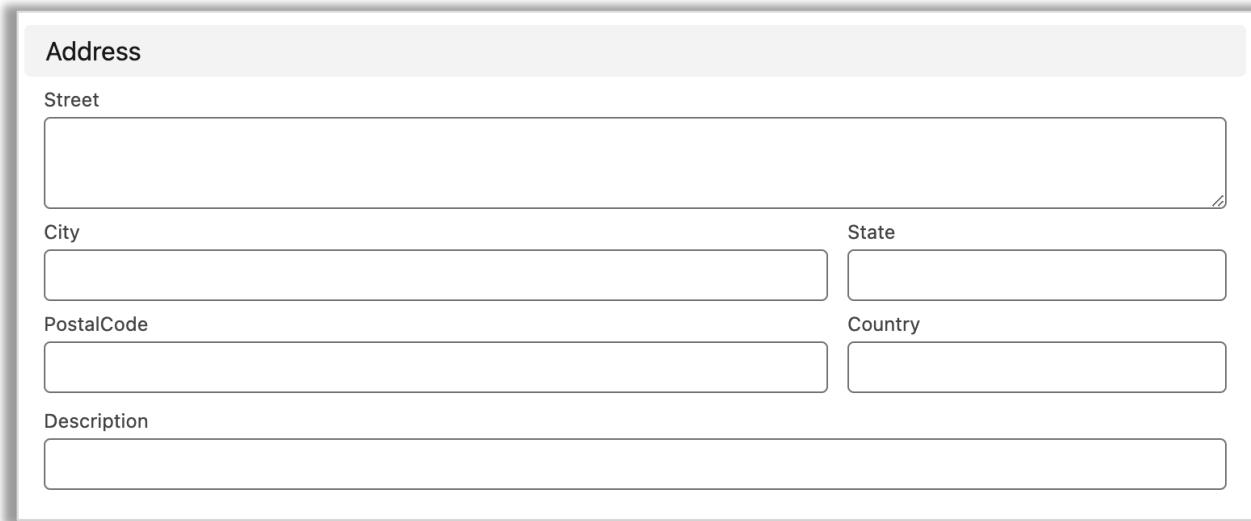
Including an Address

The Mass Recurring Non-Availability 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.



A screenshot of a user interface for entering an address. The form is titled 'Address' at the top. It contains five input fields: 'Street' (a large text area), 'City' (a text field), 'State' (a text field), 'PostalCode' (a text field), and 'Country' (a text field). Below these is a larger 'Description' field with a text area.

View Recurring Resource Absence Records

When resource absence records are created using the Mass Recurring Non-Availability 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							
	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

Get Resources

Get Resources

Territory	Resource
<input checked="" type="checkbox"/> Western Canada	<input checked="" type="checkbox"/> Technician 1
<input checked="" type="checkbox"/> Atlantic Canada	<input checked="" type="checkbox"/> Technician 2
<input checked="" type="checkbox"/> Northern Canada	<input checked="" type="checkbox"/> Demo Dispatcher 2
<input checked="" type="checkbox"/> Prairies	<input checked="" type="checkbox"/> Technician 3
<input checked="" type="checkbox"/> Eastern Canada	

Create or Delete Resource Absence

Create Resource Absence
 Delete Resource Absence

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

Find Absences

Absence Type

* Start Date
* End Date

Absence Type
<input type="checkbox"/> Vacation
<input checked="" type="checkbox"/> Meeting
<input type="checkbox"/> Training
<input type="checkbox"/> Medical
<input type="checkbox"/> Holiday

Display

5. Select a **Start Date** and **End Date** to set the range for the absence resource records to retrieve.
6. 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.

Service Resource Name	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 type="checkbox"/> Suri	Meeting	05/22/2024, 10:00 AM	05/22/2024, 1:00 PM	Team Meeting	RA-115247	RRA0659

Delete

- Review the results. You can use the search/filter component to type criteria to further filter the results.
- 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.

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

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

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.

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

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

Resource	Absence Number	Type	Start Time	End Time
Technician_1	RA-0917	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
Technician_1	RA-0918	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
Dispatcher_1	RA-0919	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
Dispatcher_1	RA-0920	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
Technician_2	RA-0921	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
Technician_2	RA-0922	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.
Dispatcher2	RA-0923	Training	2025-01-12, 6:30 p.m.	2025-01-12, 7:00 p.m.
Dispatcher2	RA-0924	Training	2026-01-12, 6:30 p.m.	2026-01-12, 7:00 p.m.

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.