

# Holiday Schedule Setup

Last Modified on 12/18/2025 1:18 pm PST

**Pathway:** [Setup > Operations > Holiday Schedule](#)

The **Holiday Schedule Setup** tool is used to create, schedule, and update holiday dates. Scheduled holidays display in red on the customer service calendar to help users identify holidays and avoid creating work orders on those dates; however, the system does not prevent a work order from being created. This screen includes two grids for managing holidays: the top section defines the holidays, and the bottom section (**Holiday Schedule Items**) schedules them using date fields.

HOLIDAY SCHEDULE SETUP		SETUP > OPERATIONS > HOLIDAY SCHEDULE	
			
NAME		NOTE	
Company Meetings			
Christmas			
St Patricks Day			
Rolloff Schedule			
Commercial Schedule			
Holiday Schedule Items			
			
NAME	FROM DATE	TO DATE	NOTE
Christmas	12/25/23	12/25/23	
Christmas 2024	12/25/24	12/25/24	

## Permissions

The following permission is required to view, add and edit the Holiday Schedule Setup screen:

Permission ID	Permission Name
24	Setup \ Operations

## Add Holiday Schedule

The **Add Holiday Schedule** tool creates holiday labels for holiday dates to be scheduled into.

The screenshot shows the 'HOLIDAY SCHEDULE SETUP' screen. On the left, there is a list of existing holiday names: 'Company Meeting', 'Christmas', 'St Patricks Day', 'Rolloff Schedule', and 'Commercial Schedule'. A red arrow points from the green '+' icon at the top left of this list to a modal window titled 'ADD HOLIDAY SCHEDULE'. The modal has fields for 'NAME' (with a placeholder 'New Holiday') and 'NOTE' (with a placeholder 'New Note'). A 'SAVE' button is at the bottom.

### Add a Holiday

1. Select the green '+' icon and 'Add Holiday Schedule Item' pop up label maker will appear.
2. Enter the **Name** of the holiday to the name field.
3. Enter a **Note** (optional).
4. Click **Save** when finished.

## Add and Edit Holiday Schedule Items

In the **Holiday Schedule Items** section, schedule the previously identified holidays using the **From Date** and **To Date** fields. If maintaining a history of holidays is not necessary, existing holiday dates can be edited to reflect current or future schedules.

The screenshot shows the 'Holiday Schedule Items' screen. On the left, there is a list of existing holiday items: 'Christmas' (From Date: 12/25/23, To Date: 12/25/23) and 'Christmas 2024'. A red arrow points from the green '+' icon at the top left of this list to a modal window titled 'ADD HOLIDAY SCHEDULE ITEM'. The modal has fields for 'NAME' (with a placeholder 'New Holiday'), 'FROM DATE' (with a placeholder '12/25/23'), 'TO DATE' (with a placeholder '12/25/23'), and 'NOTE' (with a placeholder 'New Note'). A 'SAVE' button is at the bottom.

### Add Holiday Schedule Item

1. Select the **holiday** from the upper grid you would like to create a holiday schedule for.
2. Select the green '+' icon and the 'Add Holiday Schedule Item' popup editor will display.
3. Enter a **Name** for the holiday. This will display on the Customer Service Calendar for all accounts.
4. Enter a **From Date** in MM/DD/YY format. This is the date the holiday begins.
5. Enter a **To Date** in MM/DD/YY format. This is the date the holiday ends.
6. Enter a **Note** (optional). This displays on the Calendar for all accounts by hovering over the holiday

name.

7. Click **Save** when finished.

### **Edit a Holiday Schedule Item**

1. Select the holiday from the upper grid to open to display its associated Holiday Schedule Items tab in the lower grid.
2. Double click on the holiday schedule line item you would like to edit to open the Update Holiday Schedule Item popup editor.
3. Make your necessary edits and click away for the system to auto-save the change.

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