Business Holidays

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Tell Pipeline which days your office is closed, and business-day due dates step right over them.

Introduction

Pipeline already knows about weekends. Saturdays and Sundays never count as business days, so they're never yours to enter. What it can't know is which holidays your office actually observes, because offices don't agree. Plenty of brokerages work days that others close for.

So that list belongs to your account, and you keep it a year at a time rather than setting it once and leaving it. Once a day is on it, anything counting in business days steps over it: a task due five business days before closing, and the scheduling behind your automatic messages. It's date arithmetic rather than a calendar, so a holiday you add doesn't appear on a transaction, sync anywhere, or announce itself. It changes how the counting comes out, and that's all it does.

A due date stops landing on a day nobody is in the office. A holiday applies to the dates worked out from the moment you add it, so a list built now shapes the deals ahead rather than rewriting the ones behind.

How It Works

Holidays are kept per year, they apply to business-day counting only, and they change future calculations rather than dates already worked out.

What Goes on the List?

The days your own office closes. Saturdays and Sundays are never business days and are never yours to enter, but Pipeline doesn't apply federal holidays on its own: a brokerage that works the day after Thanksgiving and one that closes for it need opposite behavior from the same setting, so Pipeline asks rather than guessing. Whatever you don't add is an ordinary business day. Each entry lives under a specific year, so a holiday spanning the turn of the year, like New Year's Eve and New Year's Day, goes in as two entries, one under each.

Which Rules Use Them?

The two counting methods that care about business days, in both task due dates and message schedules — so a message set to go out three business days before closing respects your closed days the same way a task due date does. A date you type in yourself counts exactly as you entered it. Beyond the arithmetic the list does nothing: it never appears on a calendar in Pipeline, syncs anywhere, or sends an alert.

Rule	What it does with a business holiday
Business Days	Skips it outright.
Calendar Days (due Business Day)	Counts through it, then nudges the result forward if it lands on one.
Calendar Days	Ignores it completely.

A due date is what puts a task on your Tasks page, into your reminder emails, and onto your calendar — and taking it

back off is how you quiet a task you no longer need.

See Task Due Dates

When Do They Take Effect?

On every calculation made from the moment you add them. Tasks that already have due dates keep the dates they were given, even where one now sits on a day you just added, and there's no bulk reschedule to sweep them — adjust the handful of live transactions that need it on the transactions themselves.

Add a Business Holiday

Put a day your office is closed on the list so business-day due date rules skip it.

Who Can Do This: The master admin. Business holidays apply across every location, so no other role can change them.

To add a business holiday:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Business Holidays] from the Templates section of the left menu.
3. Check the year selected at the top of the page, and change it if the holiday belongs to a different year.
4. Enter the holiday's name and its date in the fields provided.
5. Click [Update Business Holidays].

From now on, any rule counting Business Days or Calendar Days (due Business Day) steps over that date. Due dates already calculated on transactions keep the dates they have.

Set Up Next Year's Business Holidays

Fill in a future year's closed days without waiting for the current year to finish.

Who Can Do This: The master admin.

To set up next year's business holidays:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Business Holidays] from the Templates section of the left menu.
3. Choose the year you're setting up from the year selector at the top of the page.
4. Enter each holiday's name and date for that year.
5. Click [Update Business Holidays].

Next year's closed days go on the list right away. Any due date that falls in that year and counts business days accounts for them the moment Pipeline works it out. This is worth doing in the fall: a task written in December for a January deadline counts against whatever is on the list at that moment.

Remove a Business Holiday

Take a day off the list when your office no longer closes for it.

Who Can Do This: The master admin.

To remove a business holiday:

1. Click the [Gear] in the upper-right corner, then [Admin / Settings].
2. Click [Business Holidays] from the Templates section of the left menu.
3. Choose the year the holiday is saved under.
4. Clear that holiday's name and date fields.
5. Click [Update Business Holidays].

The day counts as an ordinary business day in every calculation made from here on. Due dates that were already worked out around it don't move.

Frequently Asked Questions

Does Pipeline know about federal holidays?

No, and that's on purpose. Offices don't observe the same days, so Pipeline asks you which ones your company closes for rather than guessing. Anything you haven't added counts as an ordinary business day.

Do I need to enter weekends?

No. Saturdays and Sundays are always excluded from business-day counting. The list is only for the extra days your office is closed.

Who can add business holidays?

Only the master admin. The list applies across every location, so it lives with the account-wide settings. A location admin won't see the option.

Do I have to redo this every year?

Holidays are stored per year, but you can set up several years in one sitting. Switch the year at the top of the page and enter each year's dates — you don't have to wait for the current year to finish, and you don't have to come back every January.

Will adding a holiday fix due dates that already landed on it?

No — the list only affects calculations made from here on. Tasks that already carry a due date keep it, and there's no bulk reschedule. Adjust those dates on the transactions that matter.

Which due date rules actually use business holidays?

Business Days and Calendar Days (due Business Day). A plain Calendar Days rule counts straight through them.