

Create Time Blocks

08/26/2025 12:17 pm CDT

Overview

In addition to tracking a user's regular appointment schedule, one can also create a record of company holidays, vacation time, personal appointments, staff meetings, or any impromptu departure from their regular schedules.

You have two options available to block off time so that new appointments can't be scheduled during that time.

- **Holidays** are at the organization level and affect all service agents within the organization
- **Time Blocks** are for setting aside time for specific service agents only

This article will review:

- [Holidays](#)
- [Time Blocks](#)
- [FAQs](#)

Video Tutorial

Your browser does not support HTML5 video.

Adding Organization Holidays

To add new company holidays, use the following steps:

1. Go to **Control Panel**.
2. Click on **Scheduling**.
3. Scroll down to the section labeled **Holidays**.
4. Click on **Add** and fill out the dialog. You can block out a specific day or a range of days. The Name value does not have to be unique and will display on the Month and Week calendar views.

Hit **Save** to confirm.

Add...	Name	Dates
Edit Delete	Thanksgiving	Thu, Nov 28, 2024
Edit Delete	Fourth of July	Thu, Jul 4, 2024
Edit Delete	New Year's Day	Mon, Jan 1, 2024

Adding a Service Agent Time Block

Time Block entries are only available for service agents. Time blocks specify times and dates that the agent will be unavailable for scheduling.

You can input a reason to describe the nature of the absence. You also can add an address to a time block, so the system will calculate drive time for that agent should you want to book a contact/service-related appointment before or after that block. These Time Blocks appear on the calendar. You can add time off entries via the blue hyperlink on the bottom of the calendar view or via the Service Agents details screen.

Resources

Available Service Agents

Unavailable Service Agents

Teams

Ghostbusters Van

Ghostbusters Van

Peter Venkman

Ray Stantz

Egon Spengler

Louis Tully

Mystery Machine

Mystery Machine

Shaggy

Scooby

Velma

Team 1

Team 1

Tutorial Agent

Example User

Test Team

Test User

Bonnie McMurray

Cnt 1 | Qty 1 | Dur 30 mins | Man 2 hours | Rev \$450

Cnt 0 | Qty 0 | Dur 0 mins

Cnt 0 | Qty 0 | Dur 0 mins

Cnt 0 | Qty 0 | Dur 0 mins

1 - 08:00a | Installation

John Doe

1234 Easy Street | Austin, TX 78746

My Territory

Drive 15 mins | Qty 1 | Dur 30 mins | Rev \$450

View

Team

Print

Include Tickets?

Queue Confirmations

Resend Confirmation

Add Time Block...

Add From any Calendar View

1. Click the **Add Time Block** link at the bottom of any calendar.
2. This will slide in a dialog that lets you choose the service agent, enter a reason and then the date and time range.
3. Hit **Save** to add the time off entry for that agent.

Service Agent

Merge

Edit

Delete

Additional Details

Time Blocks

Notes

Documents

Name

Scooby Do

Active?

Yes

Kind

Employee

Phone

(000) 000-0000

Email Notifications?

Enabled

Include App Acknowledae

No data to paginate

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Add...

Reason

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Add From any Service Agent

1. Go to **Control Panel > Service Agents**
2. Click on the name of the agent you want to add a time block for
3. On the right hand side you'll see the **Time Blocks** tab
4. Click Add and fill out the dialog. You can block off an entire day or a range. To enter a range, select the Time/Date Range button and either put in a time range (e.g. 1p-4p) or an end date for a range of days. You can also make the time block recurring (daily, monthly, weekly, etc.)
5. Hit **Save** to confirm

FAQs

Q: Can I edit the time block once it has been created?

A: Yes, you can edit or remove time blocks either from the Calendar or the Service Agent Detail page.