

Business Days Calculator for Salesforce: Installation & Setup Guide

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Package Dependencies

None

Introduction

This document serves as a guide to the Business Days Calculator for Salesforce package. This solution enables organizations to accurately calculate business days within Salesforce while factoring in holidays and weekends.

This guide provides step-by-step instructions on installing and setting up the Business Days Calculator for Salesforce package. It covers configuration options and utilize the solution in your Salesforce environment.

By installing Business Days Calculator for Salesforce and following these instructions, businesses can automate business day calculations, enhance reporting accuracy, and seamlessly integrate these calculations into their existing Salesforce workflows.

Install Business Days Calculator for Salesforce

1. Navigate to the Business Days Calculator for Salesforce AppExchange listing and click 'Get it Now'

2. Select whether you wish to install in a Production or Sandbox environment and select the Salesforce account where you wish to install the package.

Where do you want to install this package?

Install in a Production Environment

Install this package in the org where you or your users work, including Developer Edition orgs.

* Connected Salesforce Accounts ⓘ

↕

↻

Don't see your account? [More Info](#)

Install in Production

[Cancel](#)

3. Confirm the Installation Details. Click 'Confirm and Install'.

Confirm Installation Details

⚠ Salesforce isn't the provider of this listing and hasn't reviewed it. To understand how this affects security and trust, see the [Master Subscription Agreement](#).

Package	Version
Business Days (ver 1.1 / 1.1.0)	ver 1.1 / 1.1.0
Subscription	Organization
Free	
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username	

* ☒ I have read and agree to the [terms and conditions](#).

[Cancel](#) **Confirm and Install**

4. Select how you wish to install Business Days Calculator. We recommend selecting 'Install for Admins Only'.

Post-Install Instructions

After Business Days Calculator has been installed, the package can be configured and utilized in the following ways:

Schedule Business Days Custom Setting Calculation

The Business Days Calculator for Salesforce provides pre-calculated business day values for key timeframes, stored in a custom setting. These values can be used in formula fields, reports, and automation.

How to Use This Feature

1. Ensure Holiday Data is Configured
 - a. Navigate to Setup → Holidays and confirm that all relevant holidays are defined in your Salesforce org.
 - b. The package will exclude these holidays, along with weekends, from business day calculations.
2. Schedule Daily Updates
 - a. To keep business day calculations up to date, configure a Scheduled Flow to update these values daily.
 - i. Create a scheduled flow that runs daily

Run

Debug

Save As New Version

Start

Schedule-Triggered Flow

Flow Starts: **Wed, Apr 30, 2025, 1:30 AM** [Edit](#)

Frequency: **Daily**

[+ Choose Object](#) (Optional)

End

▶ Set a Schedule

* Start Date

Apr 30, 2025 

* Start Time ⓘ

1:30 AM 

Format: Dec 31, 2024

Frequency ⓘ

Daily 

- ii. Add the Calculate Business Days subflow to the canvas
 1. Do not set any input variables

Wed, Apr 30, 2025, 1:30:00 AM,
Daily
Start

+

Calculate Business Days
Custom Setting
Subflow

+

End

← Calculate Business Days

* Label
Calculate Business Days Custom Setting

* API Name ⓘ
Calculate_Business_Days_Custom_Setting

Description

Use values from the parent flow to set the inputs for the "Calculate Business Days" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Calculate Business Days" flow.

Set Input Values

businessDaysEndDate

Not Included

businessDaysStartDate

Not Included

businessDaysToAdd

Not Included

☐ Manually assign variables

- iii. Save and activate the flow
- b. Scheduling the subflow to run daily ensures that the Business Days custom setting values recalculate and adjust as time progresses.
3. Access the Pre-Calculated Business Day Values
 - a. The solution calculates and stores business days for the following timeframes in the Business Days custom setting:
 - i. Current Month: Total Business Days, Remaining Business Days
 - ii. Current Quarter: Total Business Days, Remaining Business Days
 - iii. Current Year: Total Business Days, Remaining Business Days
 - iv. Next Month: Total Business Days
 - v. Next 6 Weeks: Total Business Days
 - b. These values can be referenced in formula fields, reports, or other automation.

SETUP
Custom Settings

Custom Setting
Business Days

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.
If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

Edit

Delete

▼ Default Organization Level Value

Location		Month: Remaining Business Days ⓘ	7
Month: Total Business Days ⓘ	22	Next 6 Weeks: Total Business Days ⓘ	31
Next Month: Total Business Days ⓘ	22	Quarter: Remaining Business Days ⓘ	50
Quarter: Total Business Days ⓘ	65	7 Business Days Ago ⓘ	4/13/2025
Year: Remaining Business Days ⓘ	182	Year: Total Business Days ⓘ	261

View: All ▼ Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X

Setup Owner ⓘ

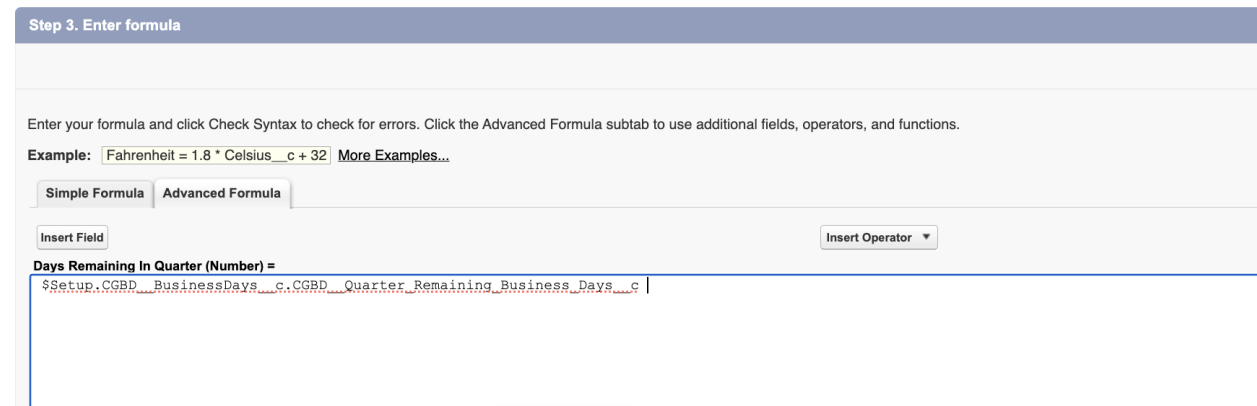
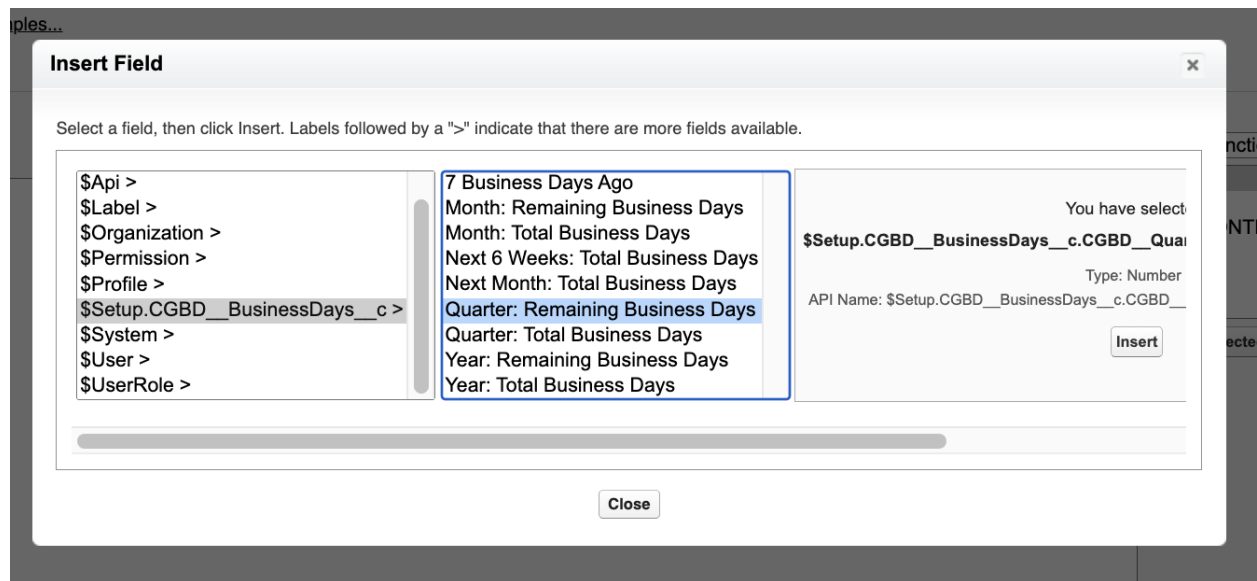
New

Location

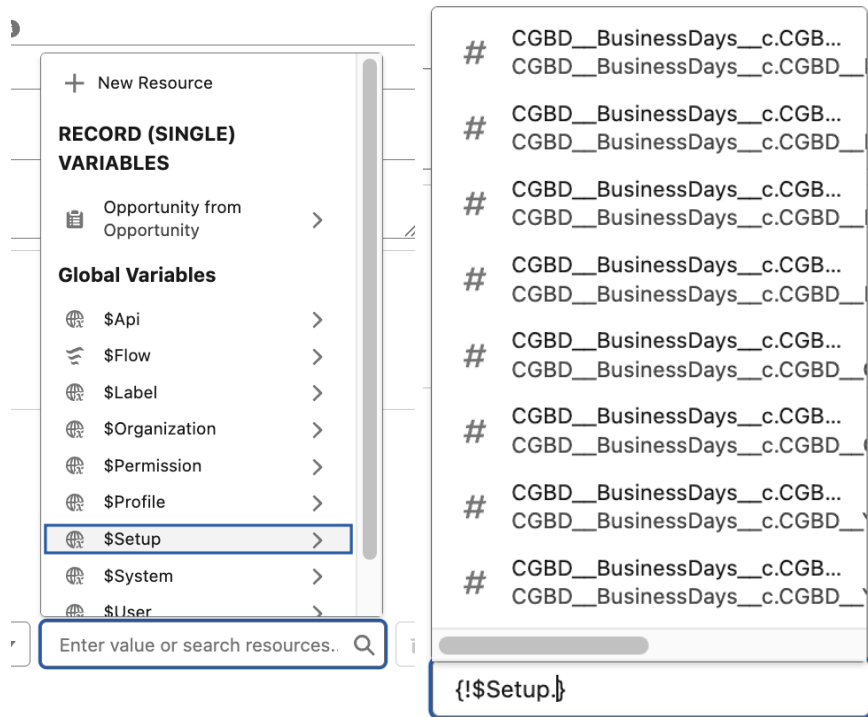
No records to display.

4. Using These Values in Reports & Automation

- a. Formula Fields: Create formula fields to retrieve values from the custom setting, making them accessible on records.



- b. Reports: Use formula fields to pull in business day values for reporting, enabling better scheduling and forecasting insights.
- c. Automation: Incorporate these values into Flows, Process Builder, or Apex for automated decision-making



Calculate Business Days Between 2 Custom Date Fields

The Business Days Calculator for Salesforce allows users to calculate the number of business days between two specified dates, excluding weekends and holidays defined in Salesforce.

How to Use This Feature

1. Ensure Holiday Data is Configured
 - a. Navigate to Setup → Holidays and confirm that all relevant holidays are defined in your Salesforce org.
 - b. The package will exclude these holidays, along with weekends, from business day calculations.
2. Invoke the Calculate Business Days flow
 - a. Call the Calculate Business Days subflow from another flow, Apex, or automation tool.
 - b. Pass in the Start Date and End Date as input parameters.

Set Input Values

 businessDaysEndDate ⓘ	 varStartDate ✕	☒ Included
 businessDaysStartDate ⓘ	 varEndDate ✕	☒ Included
# businessDaysToAdd		☐ Not Included
☒ Manually assign variables		

Store Output Values

# businessDaysBetweenStartAndEnd ⓘ	{!varNumDays}
 calculatedEndDate ⓘ	Search variables... 

3. Review the Calculation
 - a. The flow returns the total number of business days between the two dates.
 - b. The calculation includes both the start date and the end date if they are business days.
 - c. If either date falls on a weekend or holiday, it will be excluded from the count.
4. Using the Output
 - a. The calculated business days value can be stored in a flow variable, allowing it to be used in the automation that invoked the flow.
 - b. It can be referenced in decision logic, assigned to a record field, or passed to another flow step for further processing.
 - c. For reporting, the value can be stored in a custom field on a record to be used in reports and dashboards.

Add Business Days to a Custom Date Field

The Business Days Calculator for Salesforce allows users to calculate an end date by adding a specified number of business days to a given start date, excluding weekends and holidays defined in Salesforce.

How to Use This Feature

1. Ensure Holiday Data is Configured
 - a. Navigate to Setup → Holidays and confirm that all relevant holidays are defined in your Salesforce org.
 - b. The package will exclude these holidays, along with weekends, from business day calculations.
2. Invoke the Calculate Business Days flow
 - a. Call the Calculate Business Days flow from another flow, Apex, or automation tool.
 - b. Pass in the Start Date and the Number of Business Days to Add as input parameters.

The screenshot shows the configuration interface for the 'Calculate Business Days' flow. At the top, the flow name 'Calculate Business Days' is displayed with a right-pointing arrow. Below this, there are three input fields: 'Label' with the value 'Add Business Days', 'API Name' with the value 'Add_Business_Days', and a 'Description' field which is currently empty. A paragraph of text explains that values from the parent flow are used to set inputs, and that outputs are stored by default, but can be referenced via API name or manually assigned. Below this is a section titled 'Set Input Values'. It contains three rows of input fields with toggle switches to the right. The first row is 'businessDaysEndDate' with a 'Not Included' toggle. The second row is 'businessDaysStartDate' with a date picker showing 'varStartDate' and an 'Included' toggle. The third row is '# businessDaysToAdd' with a number input showing '# varDaysToAdd' and an 'Included' toggle. A checkbox labeled 'Manually assign variables' is checked. Below this is a section titled 'Store Output Values'. It contains a field for '# businessDaysBetweenStartAndEnd' with a search bar. At the bottom, there is a field for 'calculatedEndDate' with the value '{!varCalculatedEndDate}'.

Calculate Business Days

* Label
Add Business Days

* API Name
Add_Business_Days

Description

Use values from the parent flow to set the inputs for the "Calculate Business Days" flow. By default, the parent flow stores all outputs. You can either reference outputs via the API name of the Subflow element or manually assign variables in the parent flow to store individual outputs from the "Calculate Business Days" flow.

Set Input Values

businessDaysEndDate Not Included

businessDaysStartDate
varStartDate Included

businessDaysToAdd
varDaysToAdd Included

☒ Manually assign variables

Store Output Values

businessDaysBetweenStartAndEnd
Search variables...

calculatedEndDate
{!varCalculatedEndDate}

3. Review the Calculation
 - a. The flow will return an end date that results from adding the specified number of business days to the start date.
 - b. Weekends and holidays are skipped, so only business days are counted.
 - c. The calculated end date will be the first valid business day after the specified number of business days has passed from the start date.
4. Using the Output in Automation
 - a. The calculated end date is stored in a flow variable, which can be used in the automation that invoked the flow.

- b. It can be assigned to a record field (e.g., a follow-up date) or passed to another flow step for further processing.
- c. For reporting, the value can be stored in a custom field on a record to be used in reports and dashboards.