

Associate Schedule

Overview

The **Associate Schedule** feature allows you to manage your employees' shifts and time off.

Creating a Schedule

To create a new schedule:

1. Click **Associate > Schedule > Admin > Modify Schedules**.
2. The first time you create a schedule you will be asked to set up the **Schedule Settings**. This is where you set your store hours, select a color theme, and set the default shift length. You can also define any holidays that your store is closed using the **Edit Holidays** button.

Schedule Settings

Schedule Settings

Color Theme: Base

Weekly Start Day: Monday

Default Shift Length: 8.5

	Store Open Time	Store Close Time	Store Open
Sunday	10:00 AM	8:00 PM	<input type="checkbox"/>
Monday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>
Tuesday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>
Wednesday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>
Thursday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>
Friday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>
Saturday	10:00 AM	8:00 PM	<input checked="" type="checkbox"/>

Edit Holidays Save Cancel

3. After completing setup click **Save**. This will bring you to the schedule management screen. Each row here represents one week. The first week is automatically created for you.

Start Date	End Date	Scheduled Hours	Requested Hours	Last Modified	Creator	Modified By	Store
8/2/2021	8/8/2021	0	0	07/26/2021	Jimmy S	Jimmy S	1

Edit Add Delete Show Past Schedules Email Print Close

- Select the first week and click **Edit**. Alternatively, you can double click. This will open the schedule screen.

Monday, August 2, 2021 (Store 1)

Print or email this week's schedule.

Key that shows what each color represents.

Switch between day and week view.

Open schedule settings.

Go to the next or previous day.

Drag and drop associates onto the schedule to create a shift.

Pending PTO requests from associates appear here.

Add PTO.

Select an associate and create a shift. This lets you define their hours for the entire week.

Save schedule changes.

Associate List:

Associate	Day	Week
Bob L	0	0
Carl K	0	0
Linda H	0	0

Pending Requests - 0

Add Time Off

Add Associate Shift

Total Working Hours 0 Total Off Hours 0

Adding a Shift

There are two ways to add associate shifts to the schedule. Once scheduled, the associate's name will be highlighted green and the **Day** and **Week** columns will indicate the number of hours scheduled so far.

Drag and Drop

Click and drag the associate from the list on the left onto the schedule. The shift will appear at whatever time you drop it.

Monday, August 2, 2021 (Store 1)

August - 2021

Day Week

2 August 2021

8:00 AM 9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM 3:00 PM 4:00 PM

02 Monday

Bob L (10:00 AM - 6:30 PM) - (8.5 Hours)

Carl K (10:00 AM - 6:30 PM) - (8.5 Hours)

Fred F (10:00 AM - 6:30 PM) - (8.5 Hours)

Jess T (10:00 AM - 6:30 PM) - (8.5 Hours)

Kenny B (10:00 AM - 6:30 PM) - (8.5 Hours)

Laura V (10:00 AM - 6:30 PM) - (8.5 Hours)

Associate List:

Associate	Day	Week
Bob L	8	8
Carl K	8	8
Fred F	8	8
George R	0	0
Jess T	8	8
Kenny B	8	8
Laura V	8	8
Linda H	0	0

Pending Requests - 0

Add Time Off

Add Associate Shift

Total Working Hours 51.0 Total Off Hours 0

You can drag the shift to move it to a different time. To change the duration of the shift, mouse to the edge and resize it. Alternatively, you can double click to open the **Associate Shift Edit** window where you can type in times.

Associate Shift Edit

Associate: 8 George R (8) Request Type: Work Shift

Date: Monday, August 2, 2021 Total Hours: 8.5

Start Time: 10:00 AM

End Time: 6:30 PM

Buttons: Delete, Save, Cancel

Add Associate Shift

The **Add Associate Shift** button lets you set an associate’s schedule for the entire week.

Store #1

Associate	Day	Week
Bob L	8	8
Carl K	8	8
Fred F	8	8
George R	0	0
Jess T	8	8
Kenny B	8	8
Laura V	8	8
Linda H	0	0

Pending Requests - 0

Add Time Off

Add Associate Shift

Total Work

Select the associate and click this button to open the shift screen. Alternatively, you can double click on the associate’s name.

Employee Week

Associate: 3 Bob L

Day	Start Time	End Time
Monday, August 2, 2021	10:00 AM	6:30 PM
Tuesday, August 3, 2021	10:00 AM	6:30 PM
Wednesday, August 4, 2021	10:00 AM	6:00 PM
Thursday, August 5, 2021	10:00 AM	2:00 PM
Friday, August 6, 2021	10:00 AM	6:30 PM
Saturday, August 7, 2021	Enter time	Enter time
Sunday, August 8, 2021	Enter time	Enter time

Buttons: Save / Stay, Save / Close, Cancel

Managing Time Off

Associates can request time off. A manager must review and approve these requests. Approved requests will show on the schedule.

To request time off:

1. Click **Associate > Schedule > My Time Off**.
2. Click **Add**. The **Scheduling Request** window will open.

Scheduling Request

Select a request type and please fill in the appropriate fields.

Associate: Sally M Store: Store #1

Request Type: Paid Time Off Status: Pending

From: 7/26/2021 To: 7/27/2021

Per Day

Date	Hours	Start Time
Mon, Jul 26	8.00	10:00 AM
Tue, Jul 27	8.00	10:00 AM

Total Hours: 16

Employee Notes

Save / Close Cancel

3. Choose the **Request Type** and choose the **Dates**.
4. Optionally, enter any **Employee Notes**.
5. Click **Save/Close**.

To approve/deny time off:

1. Click **Associate > Schedule > Admin > Manage Time Off**. Any pending requests will be listed. To see previously approved or declined requests check the **Show Approved/Denied Requests** box at the bottom.
2. **Edit** the request.
3. In the bottom left, click either **Deny & Close** or **Approve & Close**.

Note: Time off requests are also accessible via the **Pending Requests** button found in the lower left of the schedule screen.

Manager – Add Time Off

A manager can add time off manually directly from the schedule. This can be useful for tracking sick time which is not generally scheduled ahead of time.

To add time off:

1. Click **Associate > Schedule > Admin > Modify Schedules**.
2. Click the **Add Time Off** button in the lower left.
3. Choose the associate and type of time off, then click **Approve & Close**.

Viewing the Schedule

Any associate can view the schedule without needing any special permissions by clicking **Associate > Schedule > See Schedule**.

Reporting

The schedule report works in conjunction with the time card feature to show hours scheduled vs worked for each associate. To run the report:

1. Click **Reports > Management > Staff > Attendance**.
2. Choose **Date Range** you wish to run the report for and click **OK**.