



Employee Administration

This page allows you to activate/deactivate employees as well as see/edit all details for each employee, (i.e. contact info) manage shift trades, as well as time off. In an effort to help you manage your employee database this page is prefiltered to show only employees who have worked within the current year and to hide inactive employees in order to save you time.

Navigate to **Administration > Employee Admin**

- **Note:** By selecting **Show All** in the “Worked Since” drop down and unchecking the **Hide Inactive checkbox** you can see every single employee record in the POS system for any & all locations.
 - **Employees Tab:** you can search for a specific employee using the search bar at the top, or you can select the company & location, year they have worked since and find them in the list of employees.

Deactivating any old employees (those you do not wish to appear on the schedule):

Efish brings in all employees in the POS, however some of the older employees who may no longer work there may show as active in efish. To deactivate them you must follow the steps below.

1. Navigate to **Administration > Employee Admin**
2. In the Location Field select one or more locations (if you are responsible for all locations you may select them all at once using the **Toggle** button. Ensure that the “**Hide Inactive**” checkbox is checked and the **Worked Since** drop down shows “**Show All**” then click **Refresh**

Search: (3+ chars) Company: Wired Wine Bar North (toggle) Location: Wired Wine Bar North (toggle) Refresh

Worked Since: ☒ Hide Inactive Show All ▼

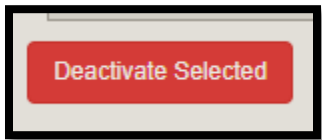
Company: Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago

Location: Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago

3. Click the **Last Shift** Column Heading to sort by the last shift (there may be several employees whose last shift is missing which means they have not clocked in recently enough for the system to recognize the last shift they worked and are likely no longer working there)
4. Select all employees who no longer work there or whom you do not wish to be on the schedule by clicking the empty checkbox to the left of the **Active** Checkbox. To select all employees on a page you can click the **checked checkbox** above the far left column.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active	Username	Name	Email	Cell	Last Shift
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		CRS			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Breana Curtis			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Alex Estes			
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Ferrantello Gabriela			

5. Next click the **Deactivate Selected Button** to deactivate them in the system.

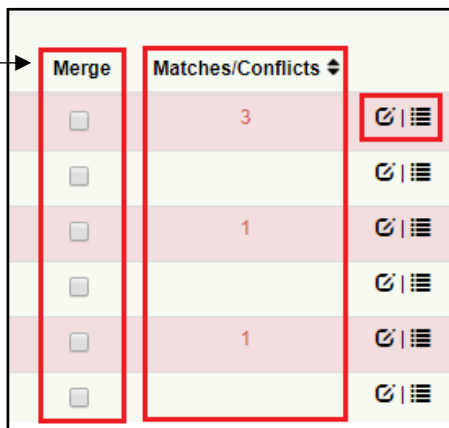


6. Do this for all employees who you do not wish to appear on the schedule (those that no longer work there) There may be several pages of old employees to deactivate before you get to your current employees. Do not deactivate any current employees.

Merging Employees: Once you are done going through all employees and have deactivated any that no longer work there. You must merge any employees who work at multiple locations. This will ensure that there is one employee record in the system linked to all their current locations and jobs. Follow the steps below to complete this process.

- **Conflicts:** efish thoroughly checks every employee against every other locations employees for any potential conflicts enabling you to have the cleanest employee

database possible. Conflicts will appear highlighted in **red**. click on the **[Edit Icon]** for any **red** employee & there will be an additional tab at the top titled "Matches/Conflicts" - Click on the **[Matches/Conflicts tab]** to view any conflicts for that employee. This provides you with a list of potential employees that are the same person.



Merge	Matches/Conflicts	
<input type="checkbox"/>	3	
<input type="checkbox"/>		
<input type="checkbox"/>	1	
<input type="checkbox"/>		
<input type="checkbox"/>	1	
<input type="checkbox"/>		

1. Navigate to **[Administration > Employee Admin]**
2. Ensure All locations are selected in the **[Location Field]**

by clicking the **[Toggle]** button then click **[Refresh]**



Search: (3+ chars) ☒ Hide Inactive

Company: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago

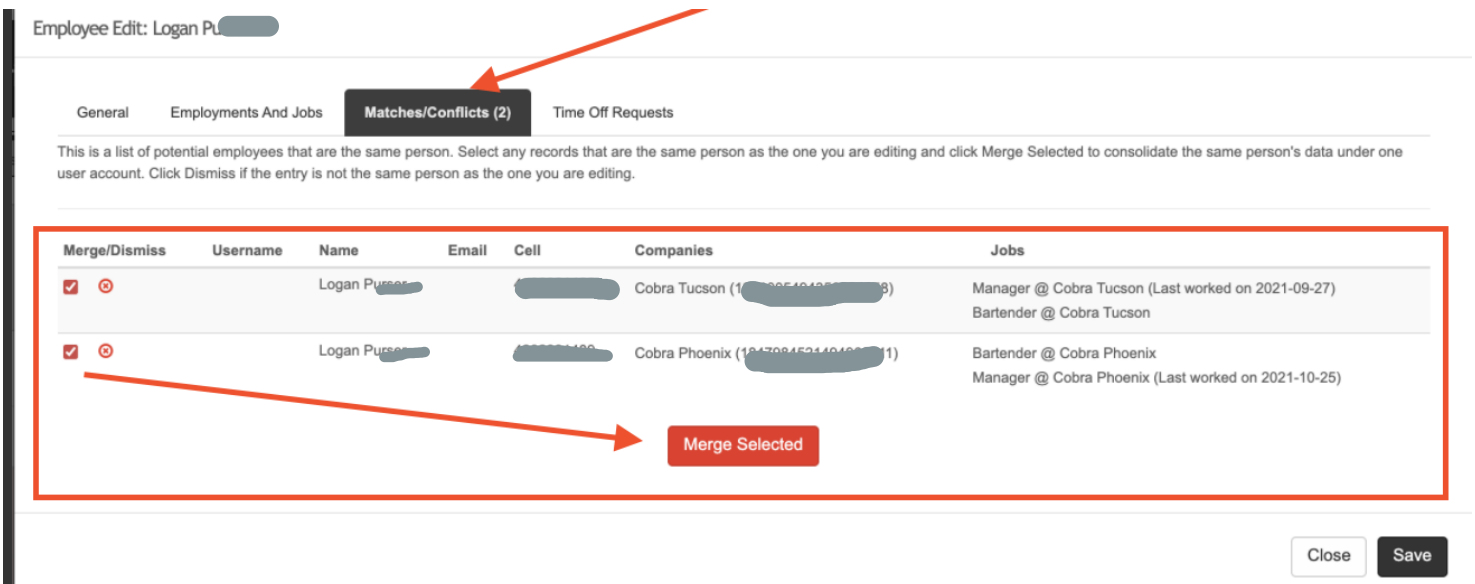
Location: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago **[Refresh]**

Worked Since:











3. Click the **[Matches/Conflicts]** column heading to sort bringing only those employees who have matches in the system to the top of the list. The red number indicates how many other employee records efish thinks may be the same employee. For example, if an employee works at 3 locations you may see a red 3 which means the 3 employee records need to be merged into one.
4. To merge click the **[edit box]** in the far-right column



- At the top of the Pop Up click the **[Matches/Conflicts Tab]**
- This is a list of potential employees that are the same person. Select any records that are the same person as the one you are editing and click **[Merge Selected]** to consolidate the same person's data under one user account. Click **[Dismiss]** (the x icon) if the entry is not the same person as the one you are editing.
- Click **[Save]** when done, do this for all employees who work at more than one location.



- Merging from the Employees Tab:** you can also merge more than 1 employee straight from the Employees Tab by clicking on the **Checkbox** under “Merge” and clicking on the **Merge Selected** button in the upper left.

Active	Username	Name	Email	Cell	Jobs Details (expand all)	Merge	Matches/Conflicts	
<input checked="" type="checkbox"/>		Aaron Ellis			Wired Wine Bar North - 1 Active Jobs	<input type="checkbox"/>	3	 
<input checked="" type="checkbox"/>		Abderrahman Rahmani			BKB - 1 Active Jobs	<input type="checkbox"/>		 
<input checked="" type="checkbox"/>		Adrian Salazar			Wired Wine Bar North - 1 Active Jobs	<input type="checkbox"/>	1	 
<input checked="" type="checkbox"/>		ADRIANA MOLINA			Cafe Penini - 3 Active Jobs	<input type="checkbox"/>		 
<input checked="" type="checkbox"/>		Adrienne Jezick			Wired Wine Bar North - 0 Active Jobs	<input type="checkbox"/>	1	 
<input checked="" type="checkbox"/>		Aerley O'Donnell			BKB - 3 Active Jobs	<input type="checkbox"/>		 

View an employee's schedule: click on the **[List Icon]** to the right of the desired employee.



Edit Employee Info: click on the **[Edit Icon]** to the right of the desired employee.

- **General Tab:** This is where you will invite an employee for integration into the scheduling software.
- Confirm their personal Info is correct. It is very important to update all current employees' emails in efish to ensure that they are all sent the initial email which will have a link to create their Shift X app account. Once they sign up for and download the Shift X app from the app store they will receive push notifications, however an email is required for each employee in efish. **NOTE:** ShiftX is the **EMPLOYEE SIDE** of the schedule and is used by employees to view and manage their schedule from their phones, it is **NOT** where you would create, edit, publish a schedule, or invite employees to ShiftX

To update each employees email in efish follow the steps below:

1. In the Location Field select one or more locations (if you are responsible for all locations you may select them all at once using the **[Toggle]** button. Ensure that the **"Hide Inactive"** checkbox is checked and the **[Worked Since]** drop down shows **"Show All"** then click **[Refresh]**

Search: (3+ chars) [input field]
Company: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago
Location: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago
Worked Since: [Show All ▼]
[Refresh]

2. click the **[edit box]** in the far right column.

Name	Email	Cell	Last Shift	Jobs Details (expand all)	Merge	Matches/Conflicts	
12				Beach Blonde - 1 Active Jobs	<input type="checkbox"/>	7	
am bar (2)			2020-05-03	Wired Wine Bar North - 0 Active Jobs	<input type="checkbox"/>	9	
AM Manager			2019-02-06	Wired Wine Bar Central - 1 Active Jobs	<input type="checkbox"/>	14	
BOLANOSSSAUL				Beach Blonde - 0 Active Jobs	<input type="checkbox"/>	5	

To INVITE EMPLOYEES TO ShiftX so they can create their account and view/manage their schedule:

1. Here you must add everyone's email address:
 - a. click on the edit icon next to the first employee listed,
 - b. Enter their email address.
 - c. And then **click the checkbox to invite them to ShiftX**
 - d. then click Save & Next to move on to the next employee in the list and do the same until ALL employees have an email address on file in efish.



Employee Edit: Aimee Cartile

click on the edit icon next to the first employee listed

General Employments And Jobs Time Off Requests

Personal Information

First Name: Aimee Middle Name: Last Name: Cartile

Birth Date: Year Month Day Part-Time/Full-Time:

Contact Information

Email: testing@gamil.com Cell Phone:

☒ Send Invite to ShiftX

Enter their email address
And then click the checkbox to invite them to ShiftX

then click Save & Next to move on to the next employee in the list and do the same until ALL employees have an email address on file in efish.

Close Save Save And Next

Per Page: 50 1

Merge Matches/Conflicts 2

1

Garrett 2022-09-20 Gino's Cafe & Sports Bar - 1 Active Jobs

- Employees will each be sent an invitation via email to ShiftX with a link to set up their account & Password. Once they complete that step, they are all set to view and manage their schedule in ShiftX. (example of email invite to example employee Mathew Melrose below)

Hello Matthew Melrose,

This email is to invite you to create a user account with eFish, where you can view your schedule, trade shifts, and update their info. [Click here to create an account.](#)

- **Note:** you can save everyone's contact info without checking the "Send Invite to ShiftX" box to get the schedule ready without notifying them and then go back once you are ready for them to receive notification & check the invite checkbox." when you hit **[Save]** after the box is checked they will be instantly notified.
- **Employment and Jobs Tab:** view and employees ID (from the POS and job codes as well as pay rates here, Inactive Jobs will be greyed out. and will not show on the schedule.)
 - **Rate or Job Changes must be made on the POS,** the changes will be reflected in efish 24 hours after the employee clocks in and out at least once with the modified rate or job code.
 - **The employee number found here is the employee ID from the POS:** and is sometimes needed to link the employee to their ShiftX account. (reach out to support@pointblanksoftware.com if you need the company ID)
 - **Management salaries are also set here:** To set a management salary, Add Manager as a job for the desired location. Click the **[Checkbox]** next to "Salary?" Then either click or skip the "Annual?" **[Checkbox]** depending on which pay rate you choose to enter (annually or Per pay period) efish will calculate the amount per pay period if you choose to



enter the annual pay rate. Enter the pay rate depending on what you have selected. Click on the “OT Exempt?” **[Checkbox]** if applicable. And ensure the “Active” **[Checkbox]** is checked. Do not forget to click **[Save]**

- **Matches & Conflicts Tab:** **tab will only be visible if a conflict was detected** view any conflicts for that employee. This provides you with a list of potential employees that are the same person.
- Select any records that are the same person as the one you are editing then click **[Merge Selected]** to consolidate the same person's data under one user account.
- Click **[Dismiss]** if the entry is not the same person as the one you are editing.
- **Time Off Requests Tab:** Managers can set an employee's availability here as well as respond to time off requests. The top of this pop up will show current unavailability which managers can edit from this section. Manage time off requests at the bottom of the pop up under “Time Off Requests” Click on the **[How To]** for help.

Employee Edit: Adrian J

General Employments And Jobs Matches/Conflicts (5) **Time Off Requests**

Not Available On

Day	Time	Job	Timeoff Type	Emp Note	Mgr Note	
Day of Week	All Day	Start Time	End Time	Job	Type	Public/Private Notes
Monday ▾	<input type="checkbox"/>	12:00 AM ▾	11:59 PM ▾	ALL ▾	Select (required) ▾	<div>Public Notes</div> <div>Private Notes</div>
How To						

Time Off Requests

Date	Time	Job	Timeoff Type	Emp Note	Mgr Note	
Date Range	All Day	Start Time	End Time	Job	Type	Public/Private Notes
<input type="text"/> / <input type="text"/>	<input type="checkbox"/>	12:00 AM ▾	11:59 PM ▾	ALL ▾	Select (required) ▾	<div>Public Notes</div>



Employee Admin > Shift Trades: Employees have the ability to trade shifts through the employee interface, Supervisors can approve/deny those shift trade requests here. Just select which company/location you wish to view at the top of the page, you can select all by clicking on both **[Toggle]** buttons.

Employee Admin > Time Off Manager: This is where supervisors can view/approve/deny pending time off requests. Simply select the company/location at the top of the page, click on **[Refresh]** & check the box next to the pending request and click either the **[Approve Selected]** or the **[Deny Selected]** buttons. They can also view weekly and upcoming requests along with any notes left by the employee who has requested the time off.

Common efish Schedule Questions:

- **Efish vs ShiftX: What's the difference?**
 - **efish** is the software that you have already been using for reporting and any other modules you may be subscribed to. efish is where users with permission can create,



edit/manage and publish schedules as well as manage employees, invite them to ShiftX and approve or deny time off and shift trade requests.

- Most of our clients choose to have a separate Role for Scheduling in efish and add a GM or whichever employee is going to manage the schedule for each location as an efish user with that role in **administration > User Settings > Add User**.
- That role will allow them to manage the schedule from efish as well as get time off request emails live as employees request them.
- **ShiftX is the employee App:** This is where all employees will manage their schedule and time off as well as shift trades, employees must be invited via efish > Employee Admin > Find and edit the employee to add their email and click the "Invite to ShiftX" Checkbox before clicking save. This will invite them to ShiftX via email. See the ShiftX how too guides for more information.
- **Why are some employee's missing from my employee admin list?**
 - Usually this is because since connecting the POS with efish, the employee has not yet clocked in and out for a shift. Efish brings employees in for most POS's the day AFTER they have clocked in and out for at least one shift.
- **Why are some job codes missing?**
 - Similarly to missing employees, sometimes jobs will not come into efish from the POS until the employee has clocked in and out at least once in the POS with that job code.
- **Why are my Labor Departments Missing or Incorrect?**
 - Efish gets labor departments from the POS but some POS's do not provide these to 3rd parties or allow you to set them up so all jobs may just show up under one group named "no job group"
 - If your POS does send this info to efish but there are incorrect jobs or names for the departments you must fix this in the POS but do NOT CHANGE THE NAME OF ANYTHING, if the name is wrong you must delete the old one and add a new one with the correct name.