



Pre Schedule Set Up – Employee Admin

Before you Create your first schedule in efish you must first complete the Employee Admin Pre Schedule Set Up to ensure everything works correctly and all your employees are notified once the first schedule is published. The Pre Schedule Set Up includes deactivating any employees who no longer work at a location, merging any employees who work at multiple locations, and updating the email on file for any current employees. This guide will walk you through each step.

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]**

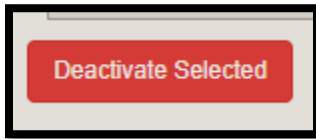
Search: (3+ chars) [input field]
Company: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago
Location: (toggle) Wired Wine Bar North, Beach Blonde, BKB, Cafe Penini, Clutch Chicago
Refresh
Hide Inactive [checked]
Worked Since: Show All [dropdown]

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



- Next click the red **[Deactivate Selected Button]** to deactivate them in the system.



- 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 who work at 2 or more locations: 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.

- Navigate to **[Administration > Employee Admin]**
- Ensure All locations are selected in the **[Location Field]** by clicking the **[Toggle]** button then click **[Refresh]**



- 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.
- 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 green 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.



Updating Email on File for all Current Employees: It is very important to update all current employees' emails in efish BEFORE publishing the first schedule to ensure that they are all sent the initial email which will have a link to create there 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. To update each employees email in efish 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: (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: Show All ▼
 Hide Inactive

3. 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	

4. In the pop ups **[General Tab]** under **“contact Information”** enter the current email address for that employee, you may also choose to add a phone number but it is not required.
5. Click **[Save]** When done. Do this for ever active employee Before creating the first schedule.