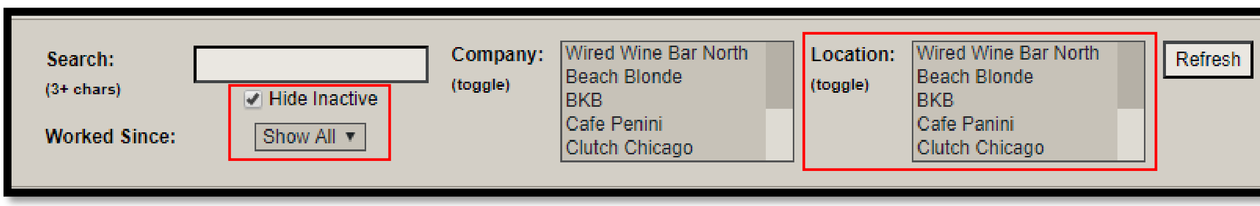
Employee Admin Pre Schedule Set Up

Before you Create your first schedule in efish you must first complete the following steps ensure everything works correctly and all your employees are notified once the first schedule is published. This includes deactivating any employees who no longer work at a location, merging any employees who work at multiple locations or are duplicated in the POS for any reason, and updating the email on file for current employees. This guide will walk you through each step.

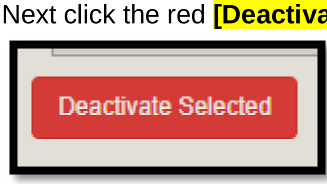
Deactivating any old employees (those you do not wish to appear on the schedule):
Efish brings in all employees in the POS, however some of the older employees who may no longer work there may show as active in efish. To deactivate them you must follow the steps below.

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]**



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.

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



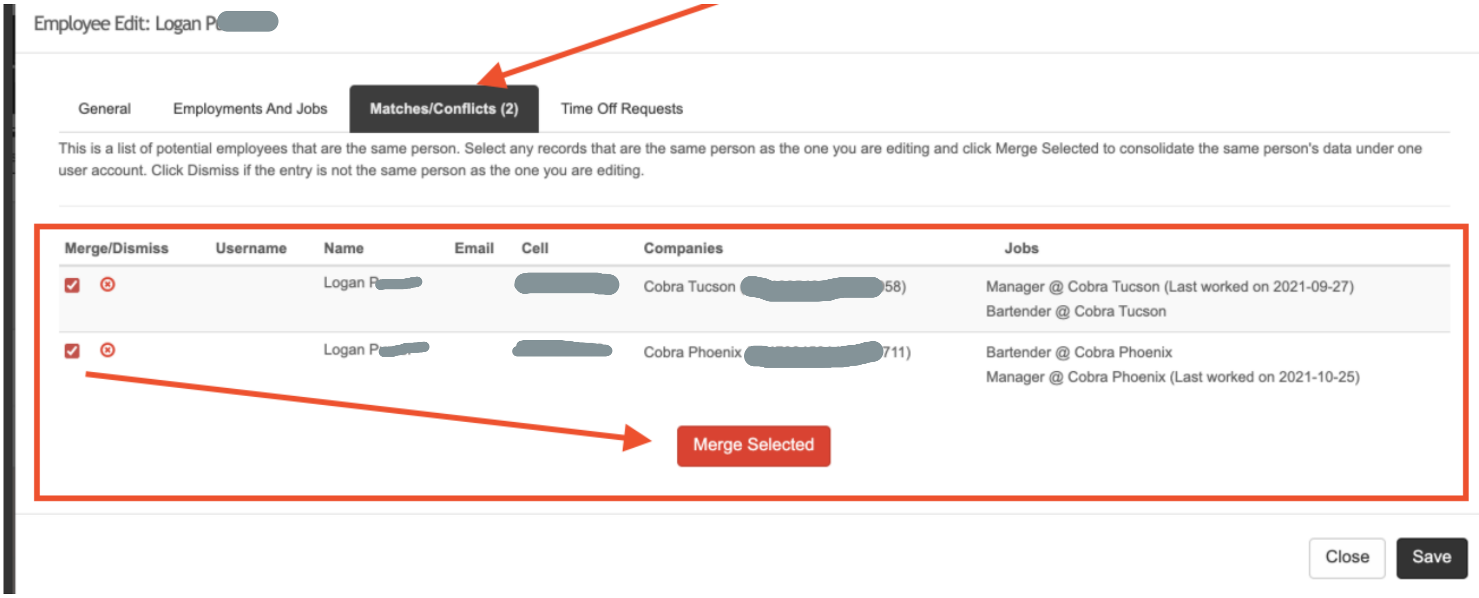
6. Do this for all employees who you do not wish to appear on the schedule (those that no longer work there) There may be several pages of old employees to deactivate before you get to your current employees. Do not deactivate any current employees.

Merging Employees 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.

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

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

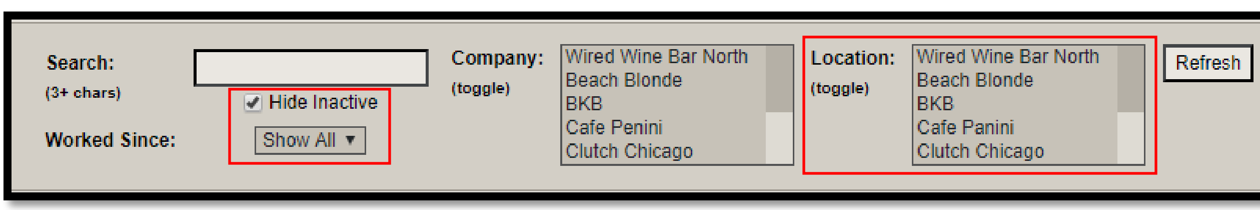
5. At the top of the Pop Up click the **[Matches/Conflicts Tab]**
6. This is a list of potential employees that are the same person. Select any records that are the same person as the one you are editing and click **[Merge Selected]** to consolidate the same person's data under one user account. Click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



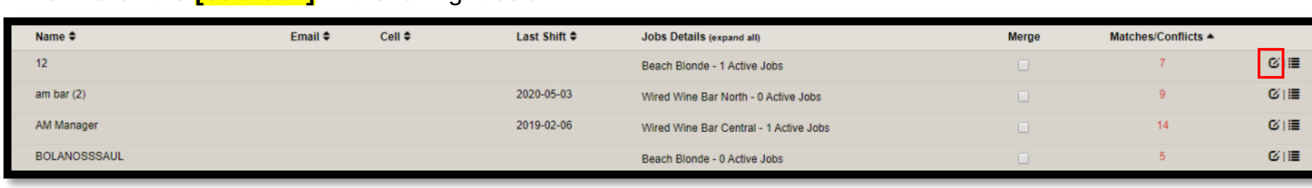
Updating Email on File for all Current Employees & Invite to ShiftX: It is very important to update all current employees' emails in efish to ensure that they are all sent the initial email which will have a link to create their Shift X app account. Once they sign up for and download the Shift X app 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. 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]**



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



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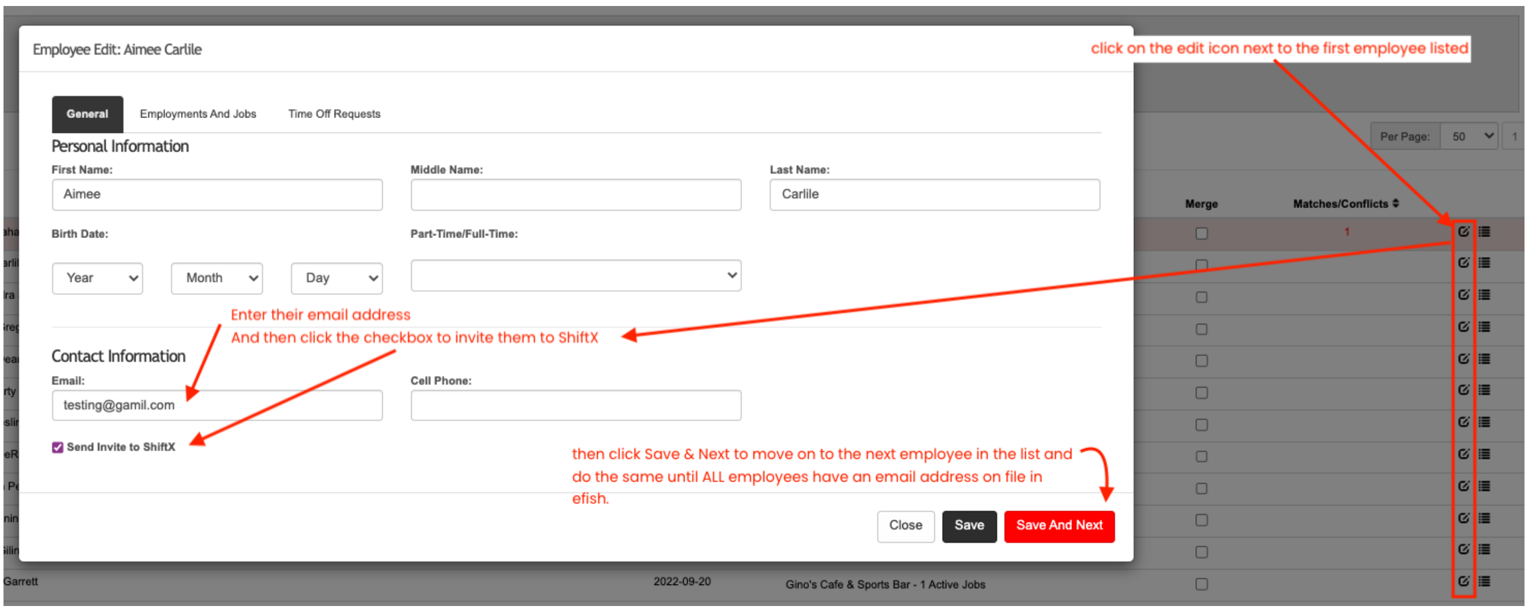
To INVITE EMPLOYEES TO ShiftX so they can create their account and view/manage their schedule:

1. you must first log into efish and navigate to [Administration > employee Admin]
2. 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.



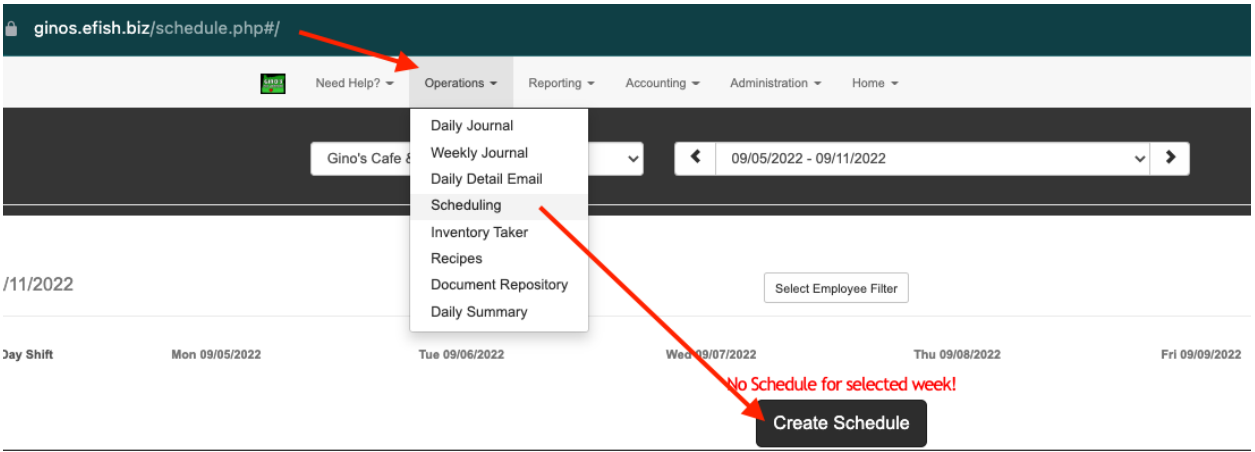
- Employees will each be sent an invitation via email to ShiftX with a link to set up their account & Password. Once they complete that step, they are all set to view and manage their schedule in ShiftX. (example of email invite to example employee Mathew Melrose below)

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.

To Create, Edit, Publish your schedule AFTER everyone has been invited with the steps above:

1. Log into efish and navigate to [Operations > Scheduling]
2. Click the **[Create Schedule]** button to start building your schedule, you can save it to come back to it later or Publish it to send out notifications to every employee with an email address on file, employees can see all published updates in ShiftX
3. More Details on how to Create/Edit your Schedule in the "Scheduling" How To


ginos.efish.biz/schedule.php#/
Need Help?
Operations
Reporting
Accounting
Administration
Home
Daily Journal
Weekly Journal
Daily Detail Email
Scheduling
Inventory Taker
Recipes
Document Repository
Daily Summary
Gino's Cafe &
09/05/2022 - 09/11/2022
/11/2022
Select Employee Filter
Day Shift
Mon 09/05/2022
Tue 09/06/2022
Wed 09/07/2022
Thu 09/08/2022
Fri 09/09/2022
No Schedule for selected week!
Create Schedule