



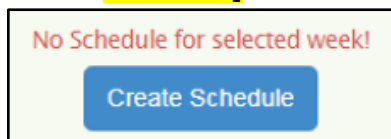
Scheduling

Intelligent scheduling maximizes job productivity in a 100% web-based solution that delivers easy access to schedules 24x7. Manage and share employees across restaurant locations and across different job codes. Track overtime and other state and local regulatory requirements as well as productivity across multiple locations.

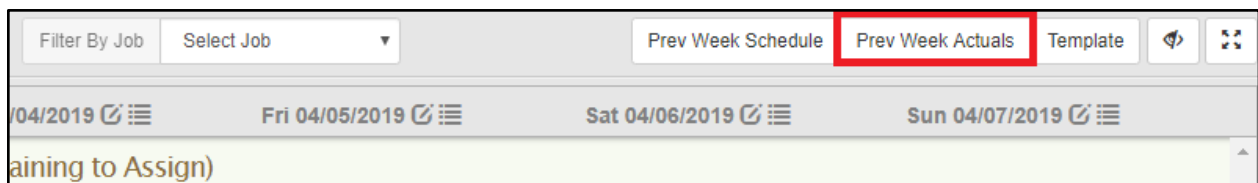
No other software allows you to set up a reliable, intelligent, profitable schedule this quickly!

Quick Start: How to setup your first schedule as efficiently as possible within efish!

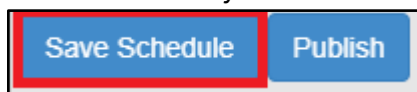
1. Navigate to **[Operations>Scheduling]**, select your desired week and click **[Create Schedule]**



2. Click on **[Previous Week Actuals]** click **[Continue]** on the first pop up, then **[OK]** on the second pop up.
 - This will automatically load everyone and their clock-in/clock-out times for the previous week giving you the best possible starting place for this week's schedule.



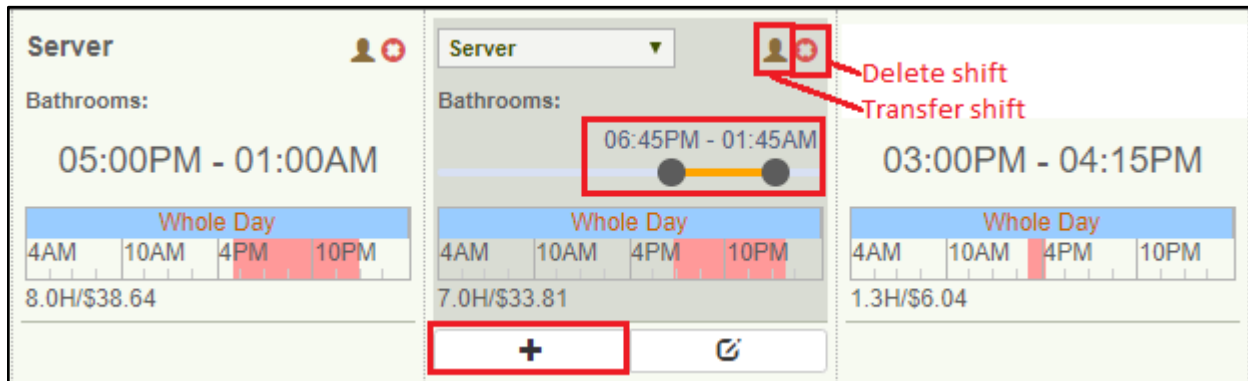
3. Click **[Save Schedule]** in the lower left.
 - If you do not save the schedule before leaving the page you will lose everything.





4. Edit your Schedule:

- **Edit Time:** adjust the **[Start/End Time Sliders]** by clicking on the end you wish to adjust and dragging it to the desired time.
 - You can click/drag the full **orange [Shift Bar]** to keep the # of hours the same.
- **Add Shifts:** Click the **[+ Icon]**, choose the position, move the sliders to set the shift time.
- **Transfer Shifts:** Click on the **brown [Head Icon]**, this will pull up everyone who can work that position & shows their current shifts, unavailability or days of requested.
- **Delete Shifts:** Click on the red **[X Icon]** in the upper right of the shift.
 - if you accidentally delete a shift, simply add it again using the **[+ Icon]**



Remember to click **[Save Schedule]** so you do not lose your work

5. **Print:** Once you are done creating the schedule, easily print out the weeks schedule for employees by navigating to **[Reporting> Week Schedule> Generate]** and clicking on **[Print]** in the upper right.
 - You can print out a Daily Roster Report (shows everyone's shifts for that specific day) by navigating to **[Reporting > Roster Report> Generate]** and clicking on **[Print]** in the upper right.

Congratulations on creating your first schedule with our simplified intelligent scheduling system! It's that easy. The following information will provide you with drill down detail on all areas of our scheduling module for your reference.

Note: The Quick Start Guide does not include the employee administration piece which must be completed Prior to creating your first schedule. For help, see the Employee admin – Schedule Set up How to Guide & video.



Employee Administration: This page allows you to activate/deactivate employees as well as see/edit all details for each employee, (i.e. Set job types, contact info) Manage shift trades, as well as time off. 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.

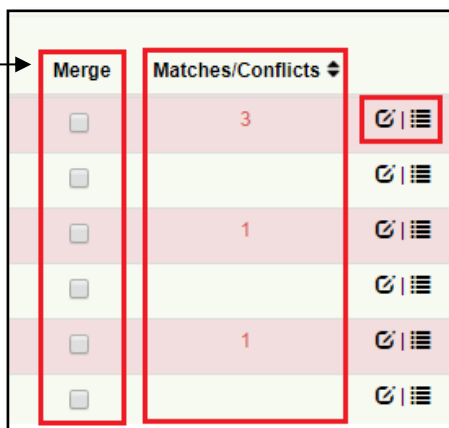
Navigate to [Administration > Employee Admin]

- **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.

- **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.



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.



- 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.

Employee Edit: Aaron Ellis

General Emplacements And Jobs **Matches/Conflicts (3)** Time Off Requests

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 if the entry is not the same person as the one you are editing.

Merge/Dismiss	Username	Name	Email	Cell	Companies	Jobs
<input type="checkbox"/>		Aaron Ellis			Wired Wine Bar North (1825)	
<input type="checkbox"/>		Aaron Ellis			Bottled Blonde (1355215713678129510)	Chef @ Bottled Blonde
<input type="checkbox"/>		Aaron/180314A Ellis			Bottled Blonde (1194126650567707221)	Chef @ Bottled Blonde

Merge Selected

Close Save Save And Next

- **Active/Deactivated Employees:** scroll through the list of employees and make sure that any employee you do not want to be active on the schedule does not have a check mark underneath “Active” to the right of their Username. you can activate/deactivate any employee here anytime by clicking on the **[Checkbox]** under Active to the right the desired employees Username.
 - Once you are done making changes refresh the page.
 - Once an employee is inactive they will no longer show on the schedule or be able to log into efish.

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 employment 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
 - Enter their contact information: Email, Cell Phone (don't need the carrier)
 - Click on the **[Checkbox]** to the right of "Send Welcome Email"
 - Hit **[Save]** when you are ready for the employee to be notified, they will be notified as soon as you click **[Save]** as long as the "Send Welcome Email" box is checked off.
 - **Note:** you can save everyone's contact info without checking the "Send Welcome Email" box to get the schedule ready without notifying them and then go back once you are ready for them to receive notification & check the "Send Welcome Email Box." when you hit **[Save]** after the box is checked they will be instantly notified.
- **Employment and Jobs Tab:** Manage employment info and add jobs here by clicking on the **green [+ Icon]** in the upper right. Remove a job by clicking on the **green [- Icon]**
 - **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:** **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 **green [How To]** for help.



Shift Trades: Employees have the ability to trade shifts through the Shift X App, 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.

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 orange **[Approve Selected]** or the red **[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.

The screenshot shows the 'Employee Administration' interface with the 'Time Off Manager' tab selected. At the top, there are three tabs: 'Employees', 'Shift Trades', and 'Time Off Manager'. Below the tabs, there are two dropdown menus for 'Company' and 'Location', both with '(toggle)' buttons next to them. To the right of these dropdowns is a blue 'Refresh' button. Below the dropdowns are two buttons: 'Approve Selected' (orange) and 'Deny Selected' (red). Underneath these buttons is a section titled 'Pending Requests:' followed by a table with columns: Employee, Date/Week Day, Start Time, End Time, Company/Location, Job, Status, and Actions. The table is currently empty, with the text 'No Time Off Requests Pending' centered below the headers. Below the 'Pending Requests' section is another section titled 'Weekly & Upcoming Requests:' with radio buttons for 'Show All', 'Weekly Only', and 'Upcoming Only'. Below these radio buttons is another table with columns: Date, Location, Employee, Job, From - To, and Notes. This table is also empty, with the text 'No weekly or upcoming time offs' centered below the headers.



Schedule Goals: the schedule goals are what set efish apart from all other scheduling systems, here you are going to map each job with the productivity desired for the job. you will want to set these up as soon as possible for enhanced use of scheduling features within efish, such as the hourly break down.

First: Navigate to **[Administration> Schedule Goal]**

- Select the desired location in the drop down.
- Choose whether you would like to estimate against Budgeted Sales, or Sales over last Week, Month, or Year. in the drop down.
- Enter the % Goal for labor per day for the entire week based on your sales forecast.

Est Against Sales Over Last Month	Week Total: \$81,769.86			Goal Avg: 21.57	Est Avg: 8.16	
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
\$10,011.04	\$11,430.37	\$8,568.36	\$9,327.65	\$14,061.78	\$16,895.19	\$11,475.47
Goal: 25.00 %	Goal: 25.00 %	Goal: 22.00 %	Goal: 20.00 %	Goal: 19.00 %	Goal: 18.00 %	Goal: 22.00 %
EST: 8.43%	EST: 7.87%	EST: 8.16%	EST: 8.15%	EST: 7.55%	EST: 8.01%	EST: 8.80%

Categories set up: This is where you will set the actual sales the job type works with. click on the **green [Categories set up]** icon next to each job type to set the % of responsibility they have for each item category per shift. You can set all to a certain % with the **[orange button]** in the upper left by typing in the desired %.

- Don't forget to click on the **blue [Save Changes]** button to the lower right when you are done.

Categories Setup

Categories Setup For: Server

Set All To

BEER	<input type="text" value="100.00"/>	CATERING	<input type="text" value="100.00"/>	FOOD	<input type="text" value="100.00"/>
MODIFIERS	<input type="text" value="100.00"/>	N/A BEV	<input type="text" value="100.00"/>	RETAIL	<input type="text" value="100.00"/>
WINE	<input type="text" value="100.00"/>				

Next: For each job type select whether you wish to set goals based on sales or transactions from the drop down. This section is used to determine staffing needs, to start you will want to ask yourself, *If I had a 1000\$ hour how many employees of this job type would I need?* This will help you determine how many employees you will need for each job type based on sales.

- Under each job type for the first day of the week enter 1 next to **“Employees”**.
- Next to **“Metric”** for each job type for each day of the week enter the sales/transaction amount threshold for one employee in that position.



- **Example:** If I need 3 bartenders for a 1000\$ hour I would divide 1000\$ by 3 and enter the result of 333.33 as that is the most sales I want handled by 1 bartender (employee).
- Once you are done setting the first day of the week you can simply click on the **green [Copy]** link to the lower left of each job type, this will copy over the settings for each day of the week, you can still make adjustments as needed.
- Once you are done setting metrics for each position click the **blue [Save Goal]** button at the bottom left.

Server ⚙ Categories Setup				
Monday	Tuesday	Wednesday	Thursday	Friday
Employee Per Sales ▼	Employee Per Sales ▼	Employee Per Sales ▼	Employee Per Sales ▼	Employee Per Sales ▼
Employees: <input type="text" value="1.00"/>	Employees: <input type="text" value="1.00"/>	Employees: <input type="text" value="1.00"/>	Employees: <input type="text" value="1.00"/>	Employees: <input type="text" value="1.00"/>
Metric: <input type="text" value="300.00"/>	Metric: <input type="text" value="300.00"/>	Metric: <input type="text" value="400.00"/>	Metric: <input type="text" value="400.00"/>	Metric: <input type="text" value="400.00"/>

Dashboard: This is the landing page when you navigate to **[Operations> Schedule]** here you can see the schedule for your entire staff for the week broken down by category (i.e. Bar, Front, Back, etc..) & employee.

- choose the desired location & week from the dropdown or by clicking on the **[Arrows]** around the current date range (default is the current week. you may schedule as many weeks in the future you like)

Scheduling Dashboard	Wired Wine Bar North	◀ 03/11/2019 - 03/17/2019 ▶
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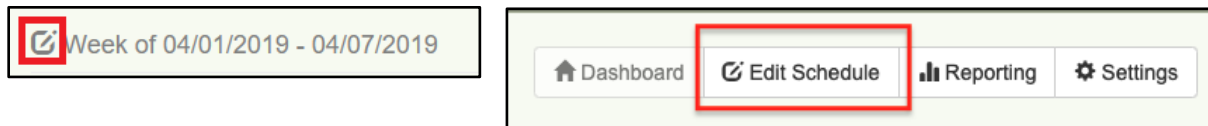
- The 1st column in the table shows the employee & hours/cost. The 2nd column shows you the “part of day” (i.e. Whole Day, Morning, Evening, etc.) The 3rd column is the day on which you start your work week as defined by your POS.

🔗 Week of 03/11/2019 - 03/17/2019			
Employee	Day Shift	Mon 03/11/2019	Tue 03/12/2019
BACK (Published on 03/15/19 09:13 AM by AIM IT Services)			
Alexis Baugh 34.3 / \$339.76	Whole Day (04:00AM - 03:59AM)		
Britlyn Gloria 6.3 / \$30.00 (27.0 / \$159.84)	Whole Day (04:00AM - 03:59AM)		
Cesar Montijo 23.8 / \$241.07	Whole Day (04:00AM - 03:59AM)		



- **Note:** you cannot edit the schedule directly from the dashboard.

Edit Schedule: you can edit the schedule either by clicking on the **[Edit Icon]** next to “Week of” or clicking on the **[Edit Schedule]** button in the upper right.



This will populate the schedule editing screen where you can see the hour/cost details as well as OT details per day broken down by category (i.e. Bar, Back, Front, etc.)

Click on the **[Expand Icon]** next to the section(s) you wish to view (Bar, Back, Front etc.)

- This will show you all employees under that section and their shifts for the week. you can make changes and add shifts from here. (Refer to step 4 from the Quick Start section on page 2.)
- The far-left column will show you the employees information including pay rate, and total hours for their job group per cost as well as OT warnings based on whether they are Full-Time or Part Time.



- You can edit an employee information directly from the far-left column by clicking on the

[Edit Icon] which will populate a new window with the General, Employment & Jobs, and Time Off Requests tabs for that employee. Easily make changes directly from here, once you save your changes and close the window they will be displayed within the scheduling view.

The screenshot shows the 'Employee Edit' window with the 'General' tab selected. Under 'Personal Information', there are input fields for 'First Name', 'Middle Name', and 'Last Name'. Below these are 'Birth Date' fields for 'Year', 'Month', and 'Day'. A red box highlights the 'Part-Time/Full-Time' dropdown menu.

- **Note:** You can also edit employee information from the daily scheduling view with the **[Edit Icon]**.

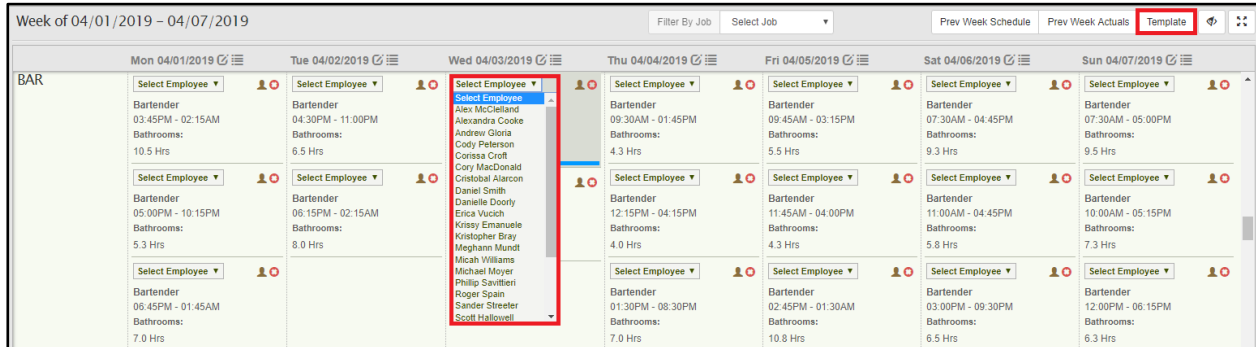
- **Save/Publish:** Make sure you click on the blue **[Save Schedule]** button before you navigate from the page so as not to lose what you have worked on. Once you are set to post the schedule just click on the blue **[Publish]** button.

A horizontal bar containing four buttons: 'Save Schedule', 'Publish', 'Save as Template', and 'Save as Template With Employees'.

- **Note:** any time you make a change to the schedule this will alert any affected employees. This keeps you safe and ensures your employees always know what is going on and what is expected as far as their schedule.

Templates: Once you have your schedule the way you want it you can save it as a template in one of 2 different ways:

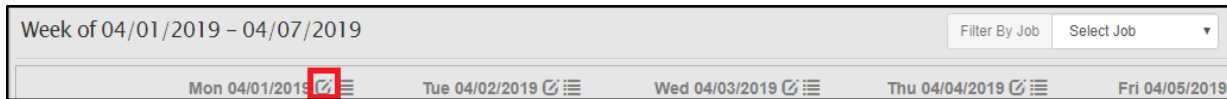
- **Without employees:** This allows you to save the shifts for each job type without associating a specific employee to each shift, to do this just click on the blue **[Save as Template]** button at the bottom of the screen.
 - Next time just click on **[Template]** in the upper right and select **[OK]** on the pop up, this will populate the template at the top of the screen with your job types saved from last time, you just need to select the names of the employees you want to drop in. (only employees of that job type will be able to be added saving you time) You can also make any needed adjustments before publishing.



- **With employees:** This allows you to save the shifts for each individual employee, which saves you time since you will not need to fill in anything at all next time. To do this click on the **blue [Save as Template with employees]** button in the lower right.
 - when selecting **[Save as a Template w/ employees]**, this will save that template as your active schedule for each week in the future until you re-save.

Daily View/Break down by Hour: color coded so you can easily see how you are staffed to the hour based on previous sales as well as the parameters set by you under **[Administration>Schedule Goals]**. This allows you to optimize every single hour of every single day.

- From the Schedule Editing screen click on the Edit Icon next to the day you wish to break down by hour.
 - **Note:** due to the amount of data please allow a few moments for the hourly report to generate. How the sales are forecasted will impact the loading time. (i.e a day will take less time than a week, a week less than a month, etc.)



Summary	Projected Sales	Budgeted Labor \$	Budgeted Labor %	Scheduled \$	Scheduled %	Scheduled hours
	\$16,747.98	\$8,235.95	37.2%	\$1,931.35	11.5%	254.75
Bartender (5)						
Sales:	\$0.00	\$0.00	\$0.00	\$0.63	\$6.52	\$2.12
Shifts: (Scheduled/Goal)	0.00	0.00	0.00	0.00	1.00	1.00
Add Bartender						
Scott Halowell						9:00AM - 5:30PM 8.50HRS
SW	HW	SP	HP			
0	0	0	0	184	1,088.83	

Under/Over by <1 employee

Under/Over by >2+ employees

Optimal Schedule



- The far-left column of the daily schedule view shows any OT warnings as well as the number of shifts for the week, hours already worked this week (color coded), Shifts this pay period, and hours this pay period. You can edit employee information directly from here by clicking on the green **[Edit Icon]** next to the employee's name.

SW	HW	SP	HP
12	79.61	64	415.45

This Part-Time Employee is scheduled for more than 30 hours

Reporting:

Dashboard Edit Schedule **Reporting** Settings

Roster Report: by clicking on **[Roster Report]** and setting your desired filters, create a print out of the day - lists all employees with full shifts listed for the day broken down by job type and part of day.

Reports

Schedule

- Roster Report
- Week Schedule

Roster Report

Filters

Date: 03/20/2019

Day Parts (toggle all)

- Whole Day
- None

Job Groups (toggle all)

- BACK
- BAR
- FRONT
- No Job Group

Jobs (toggle all)

- AM Server Assistant
- Bar Back
- Bartender
- Cocktail
- Host(less)
- Line Cook
- Manager
- Manager Hourly
- PM Server Assistant
- Server
- Training

Layout

Columns (toggle all)

- First Name
- Last Name
- Job
- In Time
- Out Time
- Tags

Generate



**Roster Report - Wired
Wine Bar North
Tuesday, March 19, 2019
Generated On: 03/20/2019 03:48PM**



Whole Day		
BACK		
Line Cook	08:00AM	04:30PM
Line Cook	08:15AM	04:15PM
Line Cook	08:15AM	04:15PM
AM Server Assistant	12:00PM	04:30PM
Line Cook	02:00PM	06:15PM
Line Cook	03:45PM	01:15AM
Line Cook	03:45PM	01:15AM
Line Cook	03:45PM	11:15PM
Line Cook	03:45PM	01:15AM
Line Cook	04:00PM	09:30PM
Line Cook	06:00PM	10:00PM
BAR		
Bartender	09:00AM	05:00PM
Bartender	03:30PM	09:45PM
Bartender	07:00PM	11:15PM
FRONT		
Server	09:00AM	05:15PM

- **Weekly schedule:** easily create and print out your weekly schedule as shown on the Scheduling Dashboard. Simply click on the **[Week Schedule]** option. This allows you to provide a hard copy to your employees any time.

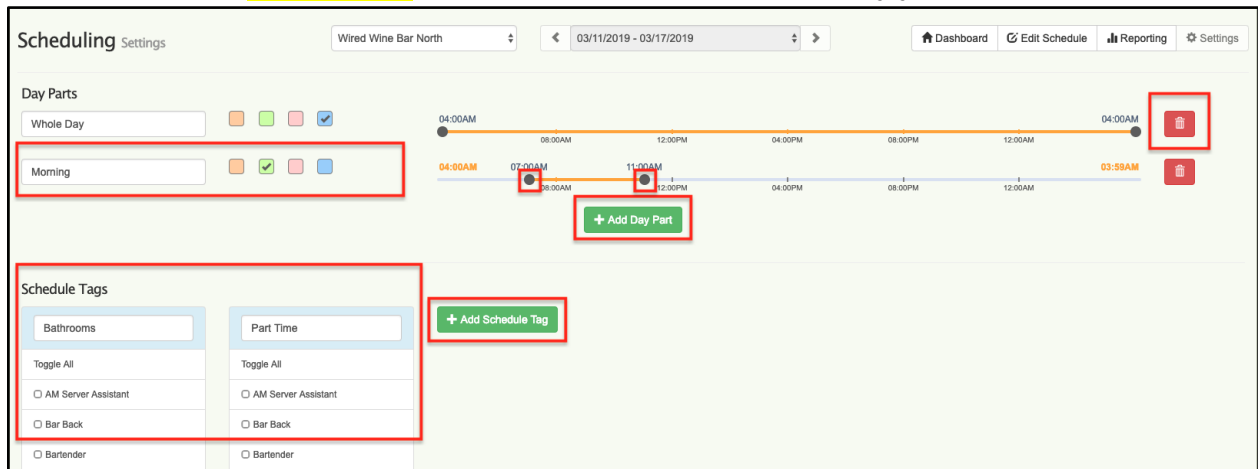
Wired Wine Bar North - Week of 03/11/2019 - 03/17/2019				
Generated: 03/20/2019 01:56PM				
Employee	Day Shift	Mon 2019-03-11	Tue 2019-03-12	Wed 2019-03-13
BACK				
Alexis Baugh	Whole Day			Line Cook 05:00PM - 12:00AM
Britlyn Gloria	Whole Day			
Cesar Montijo	Whole Day			Line Cook 03:00PM - 11:30PM
Chandler Timmick	Whole Day		AM Server Assistant 12:00PM - 02:45PM	
Chris Turner	Whole Day	Line Cook 07:00AM - 08:00PM		
Christopher Vance	Whole Day		Line Cook 08:15AM - 04:00PM	
Dana Lillis	Whole Day	AM Server Assistant 11:45AM - 04:30PM		AM Server Assistant 12:00PM - 04:30PM
Dennis Ward	Whole Day	Line Cook 04:00PM - 12:30AM	Line Cook 04:00PM - 09:30PM	
Eric Grant	Whole Day	Line Cook 02:15PM - 10:15PM	Line Cook 12:15PM - 09:15PM	
Fernando Franco	Whole Day			Line Cook 08:00AM - 03:30PM



Settings:

Day Parts: break your day down the way it makes sense for you - easily add parts of the day such as (morning, night, mid)

- Click on the **green [+ Add Day Part]** button, enter the desired name of the day part in the empty field, select the color you wish the day part to appear, and use the **[end points]** on the timeline to set the time of day you wish to label.



Schedule Tags: Set up Schedule tags that allow you to assign side work or additional tasks/duties as well as locations and or roles to an employees scheduled shift, you can use this for things that normally are assigned by the manager during the shift saving time and setting that expectation before they even arrive for their shift. You can set them up by job type so that only the tags applicable to a certain job type will appear for an employee of that job type.

To set up a schedule tag:

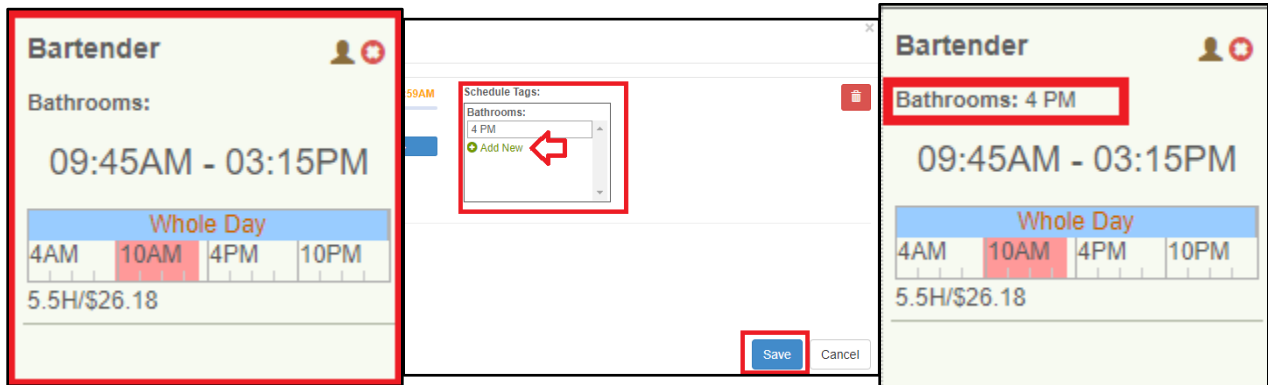
- Click on the **green [+ Add Schedule Tag]** button, Type in the desired tag name in the **[Enter new tag name]** field.
- Click the **[Check Box]** to the left of any job types who you may wish to apply the tag to, click **[Toggle All]** to select all job types. This will apply the tag to everyone.
 - **Note:** you can always edit your tags any time by navigating to **[Operations> Scheduling> Reporting> Schedule Tags]**

You can add notes to a Schedule Tag for an individual shift. For example, a time to complete the task.



To add notes to a tag:

- From the weekly view find the shift you wish to tag, Double Click the **[Shift Box]**, this will open a pop up where you can add a tag on the right-hand side,
- Simply click on the **green [Add New]** button and add your note in the field.
- Click the **blue [Save Button]** In the lower left to save



- **Example:** Joe is a Bartender and tonight you need him to take care of the bathrooms at 4pm. By setting up a Bathrooms tag and applying it to Bartenders along with any other job type that may handle bathrooms, you can easily add a “4pm” Note to the bathrooms tag on Joe's shift which notifies him that he will be responsible for taking care of the bathrooms at that time during that shift.