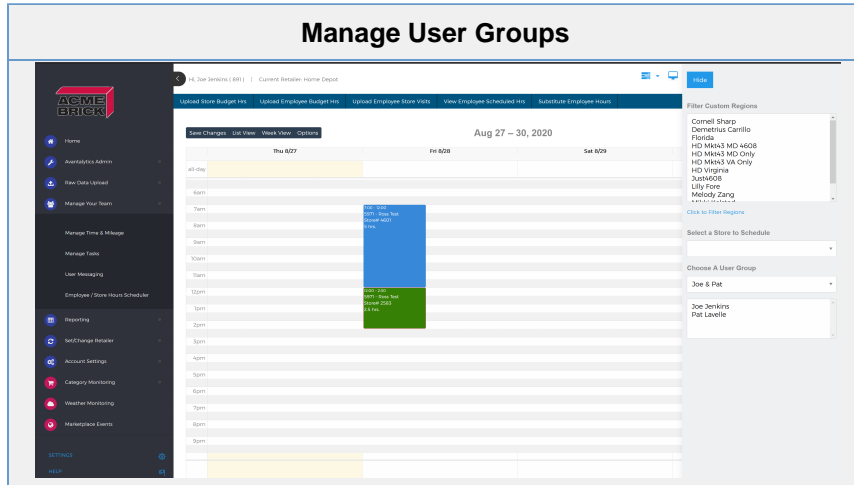


# User & Store Hours Scheduling

## Overview

New in 2019 is the ability to schedule your merchandisers time and location by week. If you're a merchandising company with hundreds or thousand's of people working in the field during season, you need to make sure that every store is getting the proper amount of hours and that you're directing your field personnel where they need to go. To this end we've enabled you to schedule and monitor both with our new calendar enabled interface shown below.



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## Related Links

- [Manage User Groups](#)
- [Setting and Managing Notifications](#)
- [Create Custom Regions](#)

## Scheduling Users

Scheduling is managed on the right hand side of the screen. You can select a custom region to limit the scheduled blocks to only a certain group of stores. As you do this, the store list below will limit to only the stores in the region and the scheduled blocks shown in the middle should also be limited. An Example is shown below. The list will show the remaining hours budgeted for each store (if entered, to learn more on how to do this – click here). You can select a store - doing so will autopopulate the store in the scheduling pop-ups. The third setting allows you to choose a user group to limit the people listed to your direct reports. This can be helpful in large list of users.

The screenshot displays a scheduling interface with the following components:

- Hide**: A blue button at the top left.
- Filter Custom Regions**: A scrollable list containing:
  - Cornell Sharp
  - Demetrius Carrillo
  - Florida
  - HD Mkt43 MD 4608
  - HD Mkt43 MD Only
  - HD Mkt43 VA Only
  - HD Virginia
  - Just4608
  - Lilly Fore
  - Melody Zang
  - Melody Zang
- Click to Filter Regions**: A blue link below the region list.
- Select a Store to Schedule**: A scrollable list containing store identifiers and locations:
  - #4601 - FAIRFAX, VA (0 Hrs.)
  - #4602 - STERLING, VA (0 Hrs.)
  - #4603 - ALEXANDRIA, VA (0 Hrs.)
  - #4604 - WOODBRIDGE, VA (0 Hrs.)
  - #4605 - FAIRFAX, VA (0 Hrs.)
  - #4607 - MANASSAS, VA (0 Hrs.)
  - #4608 - FALLS CHURCH, VA (0 Hrs.)
  - #4617 - SPRINGFIELD, VA (0 Hrs.)
  - #4618 - WINCHESTER, VA (0 Hrs.)
- Choose A User Group**: A dropdown menu currently showing "Joe & Pat". Below it, a scrollable list shows the names of the users in that group:
  - Joe Jenkins
  - Pat Lavelle

## Adding a Scheduled Blocks

To add a block click and drag an area on the calendar to schedule. When you release a popup will appear that looks similar to the below. You can change the time duration later as necessary. In the menu below, you can type the users name or customerID and it will autofill for you. The same will happen with the stores. If you had selected a store and/or user in the above phase, they'd be auto-populated in this screen already. **Recurring Schedules** - a key feature here is the ability to set recurring schedules – so if you want a person to be in a place every week at a certain time, you can automatically schedule the for up to 4 weeks at a time.

Schedule Employee Hours ✖

### Assign Time to Store / Employee

Employee ID#

@ Store

**Optional Set Recurring**

Recurring:

Number of Weeks:

< Hi, Joe Jenkins ( 891 ) | Current Retailer: Home Depot

Upload Store Budget Hrs
Upload Employee Budget Hrs
Upload Employee Store Visits
View Employee Scheduled Hrs
Substitute Employee Hours

Save Changes
List View
Week View
Options

Aug 27 – 30, 2020

	Thu 8/27	Fri 8/28	Sat 8/29
all-day			
6am			
7am		7:00 - 12:00 5971 - Ross Test Store# 4601 5 hrs.	7:30 - 11:30 891 - Joe Jenkins Store# 4605 4 hrs.
8am			
9am			
10am			
11am			
12pm			
1pm			

You can edit the scheduled times by dragging the blocks around or down or up to shorten the duration. All **un-saved** schedule blocks are green until saved. To commit the changes, click on the "Save Changes" button on the top left. To make the scheduling interface re-appear, click on the "Options" button and continue with scheduling.

## Managing Store Hours

Store budget hours are uploaded separately, but can be monitored and checked when assigning merchandisers to stores. As you assign time, the cumulative store hours are also tracked and you'll be alerted if you exceed the weekly budget given. To upload store budget hours, locate the blue toolbar at the top and click on the "Upload Store Budget Hrs" button. You'll be presented with the upload template below. From here you can enter the info via copy / paste from Excel.

Hi, Joe Jenkins ( 891 ) | Current Retailer: Home Depot

Upload Store Budget Hrs | Upload Employee Budget Hrs | Upload Employee Store Visits | View Employee Scheduled Hrs | Substitute Employee Hours

## Add/Update Current Store Budget Hours

Below you can update store budgeted employee man-hours for each week to benchmark against. Hours are allocated by day according to the formula/percent shown below. The week ending date entered should match your payroll week as defined in the system. Any values for a given retailer/store for this week currently existing will be overwritten.

Chain ID	Store#	Week Ending	Weekly Budget Hrs.	Sat	Sun	Mon	Tue	Wed	Thu	Fri
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Enter Store Budget Hours Data Here

Add/Update Hours

## Viewing Budgeted Stores

When you budget stores, and go to the hours scheduler you will see the store's hours on the top. These can be deployed as scheduled blocks by dragging the green boxes down into a time slot. Additionally the employee will be auto-populated with the last visited user for the store. This can greatly increase the speed and accuracy of store scheduling by allowing you to see all the slots that need scheduling

Hi, Joe Jenkins ( 891 ) | Current Retailer: Home Depot

Upload Store Budget Hrs | Upload Employee Budget Hrs | Upload Employee Store Visits | View Employee Scheduled Hrs | Substitute Employee Hours

Save Changes | List View | Week View | Options

Aug 27 – 30, 2020

Prev | Next | 3 days | 4 days | 5 days | Month

	Thu 8/27	Fri 8/28	Sat 8/29	Sun 8/30
4601 Budgeted 2 hrs.			4601 Budgeted 2 hrs.	4601 Budgeted 2 hrs.
4603 Budgeted 2.57 hrs.			4603 Budgeted 2.57 hrs.	4603 Budgeted 2.57 hrs.
4605 Budgeted 1.43 hrs.			4605 Budgeted 1.43 hrs.	4605 Budgeted 1.43 hrs.
4608 Budgeted 2.57 hrs.			4608 Budgeted 2.57 hrs.	4608 Budgeted 2.57 hrs.
4640 Budgeted 1.43 hrs.			4640 Budgeted 1.43 hrs.	4640 Budgeted 1.43 hrs.
6am				
7am		7:00 - 12:00 5971 - Ross Test Store# 4601 5 hrs.		
8am				
9am				
10am				
11am				
12pm				

## Uploading / Managing Employee Budget Hours

You may also enter employee budget hours if you so choose. Doing so is just the same as uploading store budget hours. Locate the button "Upload Employee Budget Hrs" in the blue toolbar and click it, you'll see an upload interface as shown below:

- Upload Store Budget Hrs
- Upload Employee Budget Hrs
- Upload Employee Store Visits
- View Employee Scheduled Hrs
- Substitute Employee Hours

## Add/Update Current Employee Budget Hours

Below you can update budgeted employee man-hours for each week to benchmark against. Hours are allocated by day according to the formula/percent shown below. The week ending date entered should match your payroll week as defined in the system. Any values for a given retailer/store for this week currently existing will be overwritten.

Customer ID   Week Ending   Weekly Budget Hrs   Sat   Sun   Mon   Tue   Wed   Thu   Fri

Enter Employee Budget Hours Data Here

Add/Update Hours