

Create a Schedule

To create a schedule:

1. Select the **Schedule** tab under **Team Management**.
2. Select the plus (+) icon that appears whenever hovering over an employees block.

The screenshot shows a web application interface for creating a schedule. On the left is a dark sidebar with navigation options: DASHBOARD, TEAM MANAGEMENT (with a sub-menu including Schedule, Team Timesheets, Team Time Off, PREPARE FOR PAYROLL, REPORTS, PREPARE PBJ REPORT, and ADMINISTRATION), Company, Employees, and Employee Templates. The main content area is titled 'Schedule' and includes tabs for 'Shift Notifications', 'Templates', and 'Printed Files'. Below these are filters for the date range (Apr 14 - Apr 20), view options (Day, Week, Month), and 'Employee View'. A search bar and a 'Show Filter' button are also present. The main grid displays a weekly schedule for employees: Andy Smith, Angus Young, Deanna Mann, and Joe Smith. Shifts are shown as orange blocks with time ranges and 'shift test' labels. A red arrow points to a plus sign icon in the grid, indicating the action to create a new shift.

Once the “+” icon is selected, the user has the ability to:

1. Set a name for the shift by selecting the “Shift Name Box.”
2. Set the start and end time by using the dropdown menus at different times (numbers are able to be typed in as well) .
3. Add any standard break times for the shift at hand, if applicable, by selecting the blue “Add Break” button.
4. Save the shift as a template that can be used to quickly create schedules of the same criteria in the future by selecting the “Save as template” checkbox.
5. If there are already [shift templates](#) created, they would be able to be selected in the “Template” dropdown menu.
6. If there is a specific job that would need to be worked during this shift, it would be able to be selected in the “Jobs” dropdown menu.
7. Adding a color to the shift can be useful in creating differentiation between the different shifts in the schedule layout.
8. To save time in creating a schedule of a week or longer. the ability to have a shift repeat for as long as needed is provided when the “Repeat” icon is selected.

Create Schedule



START DATE(UTC)

09/27/2021

NUMBER OF SHIFTS

1

TEMPLATE **E**

None

SHIFT NAME **A**

Shift Name

START TIME **B**

12:00 AM

JOBS **F**

Please choose a job

END TIME

12:00 AM

LOCATION

SHIFT LENGTH

24 Hours

TIME ZONE

(GMT-07:00) Pacific Time - Los Angeles

COLOR **G**



BREAK

START TIME

END TIME

TYPE

Add Break

C

SHIFT NOTES

Add Shift Note

Repeat

H

Save as template **D**

Close

Create

The scheduled shift will appear on the schedule.

Schedule (i) Shift Notifications (0) Templates Printed Files

Feb 18 - Feb 24 Day Week Month Employee View Show Filter Options Publish (1)

All (1) Open (0) Unpublished (1) Display scheduled employees only Show Revenue Data List Total 6 h · 00 m \$0.00

Search	SUN, FEB 18 0h:00m / \$0.00	MON, FEB 19 0h:00m / \$0.00	TUE, FEB 20 6h:00m / \$0.00	WED, FEB 21 0h:00m / \$0.00	THU, FEB 22 0h:00m / \$0.00	FRI, FEB 23 0h:00m / \$0.00	SAT, FEB 24 0h:00m / \$0.00
OPEN SHIFTS							
AS Andy Smith							
AY Angus Young							
DM Deanna Mann							
JS Joe Smith 6h:00m / \$0.00			9 AM - 3 PM 📅				

Note: It will not be officially scheduled until you **publish** the shift. To publish a shift, select the blue **Publish** button that appears on the upper right.

A modal window will appear asking how you wish to handle the notifications to users of changes to their schedule.

You can:

- Notify all users of the new schedule
- Notify employees with changes only
- Don't send notifications.

Note, if you do not send a notification, the employee may be unaware of their schedule change unless they log in.

Publish the schedule



Feb 18, 2024 To Feb 24, 2024

Total Shifts: 1

Total Hours: 6h:00m

How do you want to send notifications?

Notify all users of new schedule

Notify employees with changes only

Don't send notifications

Close