

Create Schedule Templates

There are two ways to create a schedule template:

- Create a template from an existing schedule entry
- Create a template from scratch

Create a Schedule Template from an Existing Schedule Entry

Select an existing schedule entry from the schedule grid. Click on the “Save as Template” checkbox on the lower left, and then select the **Update** button on the lower right.

Open Shift ✕

START DATE(UTC)
09/26/2021

NUMBER OF SHIFTS
1

TEMPLATE
shift test

SHIFT NAME
shift test

START TIME
09:00 AM

JOBS
Jobs From POS > Marketing Specialist

END TIME
05:00 PM

LOCATION
Tes Location #2

SHIFT LENGTH
8 Hours

TIME ZONE
(GMT-05:00) Eastern Standard Time - Jamaica

COLOR
#FF6900

BREAK	START TIME	END TIME	TYPE	
1	04:45 PM	04:46 PM	Lunch	Delete

Add Break

SHIFT NOTES
Add Shift Note

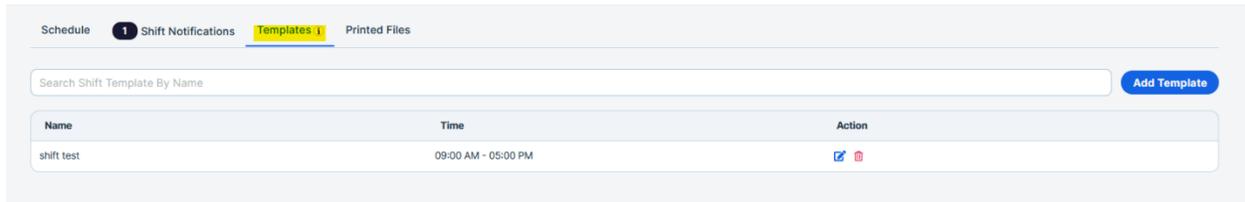
Repeat

Save as template 

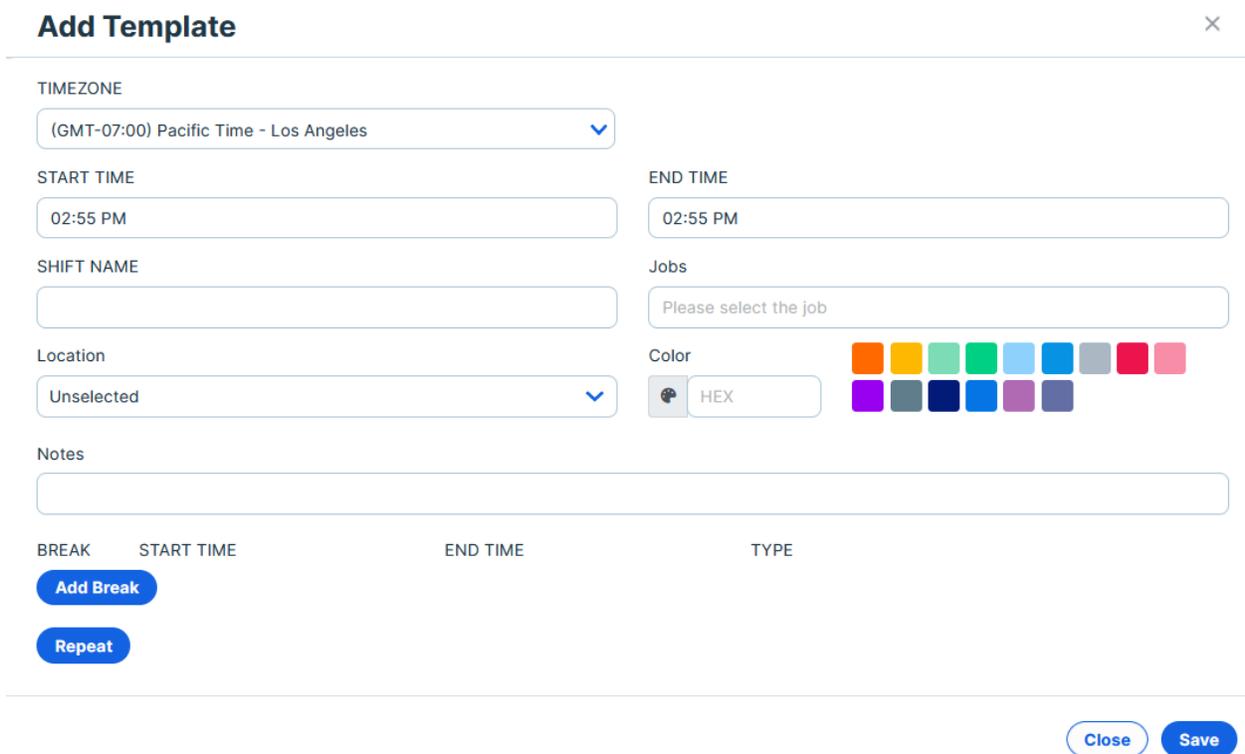
 Close Update

How to Create a Schedule Template from Scratch

On the **Schedule** page (as above), select the **Templates** tab:



And then select **Add Template** on the right.



The 'Add Template' form is displayed in a modal window. It includes the following fields and options:

- TIMEZONE:** A dropdown menu currently set to '(GMT-07:00) Pacific Time - Los Angeles'.
- START TIME:** A text input field containing '02:55 PM'.
- END TIME:** A text input field containing '02:55 PM'.
- SHIFT NAME:** An empty text input field.
- Jobs:** A dropdown menu with the text 'Please select the job'.
- Location:** A dropdown menu currently set to 'Unselected'.
- Color:** A color selection interface with a 'HEX' input field and a grid of 16 color swatches.
- Notes:** A large empty text area.
- BREAK:** A section with an 'Add Break' button.
- Repeat:** A section with a 'Repeat' button.

At the bottom right of the modal, there are 'Close' and 'Save' buttons.

You may set the time zone, the start time, end time, and give the shift a name. You can also set the location and add a designated break time. You may also set the repeat cycle, such as whether you wish it to repeat weekly or monthly on specific days. You can also set an optional end time on this template.

When you are done, select the **Save** button.