Employee Schedule

Visual Retail Plus

POS Software System

Using Employee Schedule to Effectively Track Hours & Sales

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Introduction

The Employee Schedule (ES) module collaborates with the *POS* and *Time Clock* modules to track schedules, sales, and hours worked.

With ES, it is possible create weekly schedules for employees. These schedules can be printed, exported into a spreadsheet file, and emailed to the employees. Steady schedules can be copied to reflect the following week. The recording of hours worked versus the hours scheduled is done automatically.

Daily and weekly sales goals can be specified to accompany the schedule. Contribution in company sales by each employee will be tracked to assist the managing of employees through recognition of above-average sales as well as below-average sales.

General Overview

- Employees must be assigned a default *store ID* in the *Users* module.
- *User Code* refers to an employee's alias as registered in the *Users* module.
- The *store ID* and the desired week must be specified before using the module.
  - Each week is labeled using Sunday as its initial day for scheduling.
- ES tracks individual sales and hours worked each week automatically.
- The daily sales goals boxes are an optional feature.
- Empty schedule fields are treated as the employee not working that day.
- The Level column specifies what security clearance the employee possesses.
- The Program Expiration field provides a reminder of the license expiration date.

Detailed Process

Before Using ES

Before using ES, each employee to be scheduled must be assigned to a store via the *User* module. The *User* module can be found by logging into the VRP software and clicking Back Office. From there, click Utilities.

The employee may be selected from the list on the left. Click on the name. Their information will fill on the forms in the center. Assign a store ID to the employee by using the *Def. Store* drop-down list. Assign the same store ID in the *Reports to* field, located 3 fields lower. Save the changes by using the Save button on the bottom-right corner, with the icon of a handshake. Finally, click Bye-Bye. The *User* module will close and the Utilities menu will still be available.

User Code	Name
Admin	administrator

Language   Type

Full Name   administrator

Street Address

User Defined Fields

City

UD1

State   Zip

UD2

Tel / Fax / Mobile

UD3

SSN

UD4/Email

Last Login   4/6/2015 3:37:22   Hourly Rate   0

UD5

Password   ********************   Def. Store

UPC Range (For Creating New Items)

Hired   Terminated   1/1/2099

9216100000   9216199999

Budget Min$ 0   Bud. Days   0

10 Chars   10 Chars

Cmsn Min$ 0

UPC Ranges

☐ Eligible For Commission   Reports To

PO Range (For Creating New PO(s))

Alternate Code

1000   9999999

Display as Rep

Company

Search   admin

Picture Not Available

☑ Currently Active

☐ Terminated

A   A

HR   **Rename User**   **Type By Hour**   **Update Stores**   **Print ID Card**   **Days Off**

**Export**   **Delete**   **Biometrics**   **Print List**   **Add User**   **Save**   **Exit**

From the main menu, click inside the field on the bottom-right corner, to the left of the blue arrow.
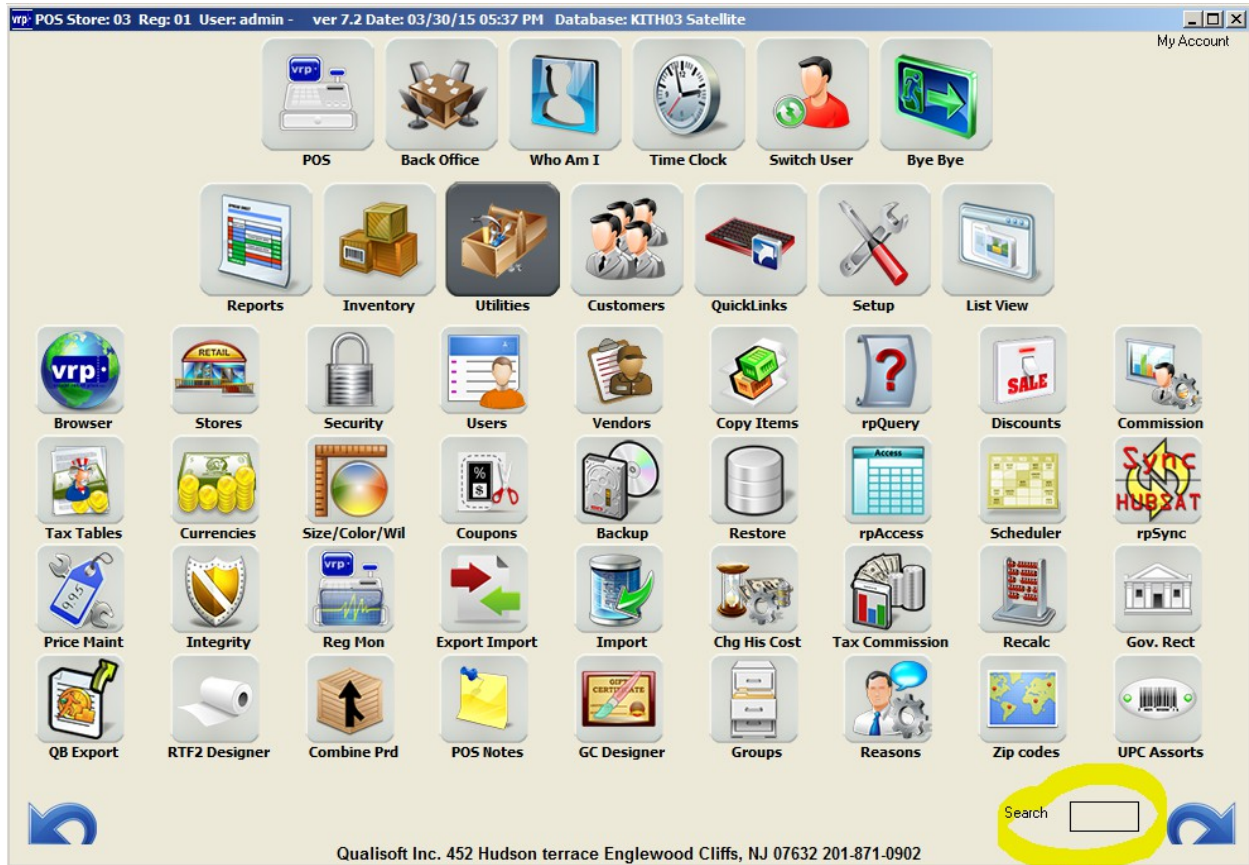
Type 'emps' into the field and then press the enter key. This makes it easier to find the module. Click the icon with the man in a black suit to open the ES module.

Choosing a Store & Week

First, select a store if one is not already set by default. This can be done by clicking the drop down list next to Store and clicking a store. Afterwards, select a week to schedule. The weeks are labeled by Sundays, with Sunday being the first day of the week. The -1/+1 buttons can be used to navigate through weeks.
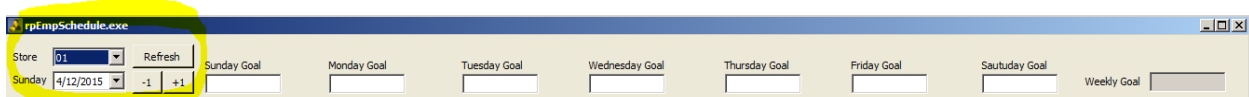
Setting Weekly Sales Goals

Click on a box next to any day of the week to enter a target sales amount for that day. The Weekly Goal box automatically fills as the daily goals are specified. This feature is optional and can be left blank.

Scheduling Employees

To increase or decrease the font size of the grid, the two 'A' buttons may be used, which are at the bottom-left corner. The left button increases the size while the right decreases it. Auto Size may be used to adjust the grid depending on the resolution of the monitor used.
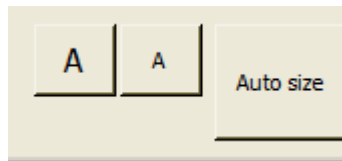
First, select the UserCode that was assigned to the desired employee. The drop-down list shows all of the employees assigned to the specified store. Select the employee and then click Refresh. The employee's Level, or security clearance, and name automatically appears.

The first box for each day is the 'From' time. This is the start of an employee's shift. The second box is the 'To' box, which designates when the employee's shift ends. If an employee's shift starts at the same time every day of the week, clicking the 'Copy Day to Entire Week' button at the bottom copies the first entry for each corresponding box for the week. 'From' boxes only copy to the other 'From' boxes and the same applies for 'To' boxes. To edit the employee's schedule, simply click the drop-down list and select the new time. If the employee's schedule repeats for the next week, click 'Copy Day to Entire Week' at the bottom in order to To remove an employee, select a field in their row such as UserCode, then click the 'Delete Line' button at the bottom. Their entry will be removed. There **is no confirmation prompt**. Any deletion is final.

e	Sun From	Sun To	Mon From	Mon To	Tue From	Tue To	Wed From	Wed To	Thu From	Thu To	Fri From	Fri To	Sat From	Sat To
ie VRP	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼
	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼
	0:00		0:00		0:00		0:00		0:00		0:00		0:00	

A	A	Auto size	Copy This Week To Next Week	Delete Line	Copy Day To Entire Week	Email Employees	Export	Print	Save	Bye Bye

Completing a Schedule

Once a schedule is complete, save it with the Save button. When switching between weeks at any time after, the saved schedule remains. The 'Email to Employees' button sends each scheduled employee the schedule as a text email. The Export button saves the schedule as a .csv spreadsheet file in a specified location. The Print button prints the schedule.

Once the schedule is saved, the sales contribution of an employee is tracked, however, they must choose their name as the only rep in the *POS* module when they are making a sale. When other employees make sales on the same register, they must be sure to replace the prior employee as the POS rep. In order to track an employee's worked hours, they must clock in using the *Time Clock* module. This recognizes that the employee has begun their shift, and when they clock out, it recognizes the end of the shift, allowing ES to add the hours. ES interacts with the two modules automatically to gather the information.