General Information

**Note:** E2 Management Suite 3.5 or Newer Required

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**Sales Forecasting**

Sales Forecasting is a part of the Labor Scheduling/Sales Forecasting Module that allows an averaged forecast based on historical data in the E2 Management Suite. Sales Forecasting consists of 3 major functions: Daily/Weekly Forecasting, Staffing Chart, and Sales Analysis.

**Daily/Weekly Forecast:**

Users can select/deselect days that calculate the forecast, to account for sales anomalies or other factors that might affect the forecast. Users can also modify the sort options for the forecast to allow customized reporting. Forecast reports Projected Sales for each hour based on selected dates and sorting options (See **Sales Forecasting Setup** for more information).

**Staffing Chart:**

Allows the user to “predict” the Minimum and Maximum number of employees needed during any given hour based on a Sales Forecast for that hour. The chart is customizable and allows editing of the Minimum/Maximum, as well as the Sales $ thresholds for each hour.

**Sales Analysis:**

Allows the user to view a report that combines Labor Information for each day with the Sales Projections/Variance calculated in the Forecast.

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**Labor Scheduling**

Labor Scheduling is a part of the Labor Scheduling/Sales Forecasting Module that allows the user to create employee schedules, assign Positions to each employee for easy viewing, and schedule availability of employees (such as Under Age Monitoring, scheduled Vacation Time, etc). Labor scheduling consists of Daily Schedule, Position Chart, Weekly Schedule Viewing, and Availability Monitoring.

**Daily Schedule:**

Users can create a Daily Schedule for all employees in the E2 Management Suite, including Hourly and Salary Employees. Schedule is a simple click/drag interface that allows scheduling in 15-minute increments and allows the user to view assigned WTD (Week to Date) hours. Setup options allow the user to be visually reminded if scheduling an unavailable employee, or if an employee is over the set hours for Overtime. Schedule reports Man Hours, Labor Wages, and Hourly Labor % based on the schedule created. Schedule also allows the user to view Projected Sales and Man Hours needed for the schedule being created.
Position Chart

User can create a Weekly Schedule based on Position in the Drive-In (Kitchen, Fountain, or Carhop). Position chart schedule will carry over to the Daily and Weekly Schedules, but will not have the advanced reporting that Daily Schedule allows (Projected Sales, Man Hours, etc).

Weekly Schedule

User can view the created schedule in a weekly format. This Schedule includes Employee Name, Clock Code (if applicable), scheduled times, and position assigned in the Daily or Position Chart. Employees cannot be scheduled using this function…all assignments must be done in the Daily Schedule or Position Chart.

Availability

User can assign a Recurring Event or Vacation/Special Event using this function. This function allows the user to select times in which an Employee is not available to work. When creating a schedule, the user will be notified with XX that the employee is not available during the time scheduled. Recurring Events, when set, will continue to notify the user, while Vacation/Special Events are one-time notification.

Sales Forecasting

### Daily Forecast - Key features

<table>
<thead>
<tr>
<th>Daily Sales Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sales Average</strong></td>
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<tr>
<td><strong>Min Staffing Based on Chart</strong></td>
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<tr>
<td><strong>Max Staffing Based on Chart</strong></td>
</tr>
<tr>
<td><strong>Projected Manhours Based on Productivity</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Thursday, Aug 10 2005</th>
<th>Sales Average</th>
<th>Min Staffing Based on Chart</th>
<th>Max Staffing Based on Chart</th>
<th>Projected Manhours Based on Productivity</th>
</tr>
</thead>
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<td>00 - 01</td>
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<td>23 - 24</td>
<td>0.00</td>
<td>1</td>
<td>3</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Sales Average

The average of up to eight previous days worth of sales data broken down on a 24-hour timetable. Average is calculated based on sort method, and selected days within that method.

**Min/Max Staffing Based on Chart**: Lists Minimum and Maximum number of employees needed based on the Sales Average amount and the $ entered into the Staffing Chart.

**Projected Manhours Based on Productivity**: Estimates the number of needed Manhours based on a set Productivity $ Amount. This amount can be edited in Setup.

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At (800) 767-6733
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**Date Range**: Gives the ability to custom select days for the Sales Average. Weather information, Temperature, and Comments are all populated from the EoD for the selected Day (or entered Manually) and allow the user to select/deselect a day that may reflect out-of-the-ordinary Sales Data.

*Note: To select a custom Date in the Date Range, Double click the Date to be changed, select the new date from the Calendar Interface, and click [Save Changes] to include that date in the current forecast.*

**Use**: Use the Calendar Wizard to select the date for the Projection.

**Daily Forecast- Setup**

**Navigation**: [Edit] > [Application Settings] > [Forecasting Setup]

### Forecasting Setup

**Forecast Date Range Setup for Average Sales:**

**Method 1**: Based on Same Day for Last **8** Weeks.
- Apply T.Y. Sales Percent plus **0** %.
- Method 2: Same Day of the Same Week for Last **8** Year.
- Method 3: Combined Average Sales for **4** Days T.Y. AND **4** Days L.Y.
  (Up to 8 Days for Total Combination)
- Apply **0** % to the Combined Sales Average.

**Forecast Based On**:
- Gross Sales  
- Net Sales

**Special Event and Holiday Setup**:
- Average Sales Based on Special Event (ie. Thanks Giving, Christmas...)

**Method 1**: Displays same day for the last X weeks to calculate the Forecast. Example: If viewing a Thursday in the Daily Forecast, it will calculate based on the last 8 Thursdays, unless specific dates are deselected. This option allows the user to set a Sales % increase to the Projection.

**Method 2**: Displays the Same Day of the Same week for the last X number of years. Example: If viewing the first Thursday of October of this year, this option will display the first Thursday of each October for the last 8 years, unless specific dates are deselected. Allows the user to set a Sales % increase to the Projection.

**Method 3**: Displays a Combined Average for the selected # of days T.Y. (This Year) and # of days L.Y. (Last Year), unless specific dates are deselected. Up to 8 days total can be combined in this method. Allows the user to set a Sales % increase to the Projection.

**Forecast Based On**: The Daily Forecast can be set to calculate based on Gross or Net Sales
Special Event and Holiday Setup

Allows the user to select/deselect preset Holidays/Special Events, or create their own Special Events. This option allows the user to add a specific % to the Sales for that Holiday or Special Event.

Example: If a forecast day is Christmas, and Christmas is selected in this option, then the Forecast will calculate based on the last 8 Christmases, while adding the +% (if applicable).

Setting a Holiday/Special Event:
1. Select [Average Sales Based on Special Event…] in the Application Settings.
2. Click [Customize] to bring up the Holiday and Special Event Interface.
3. Select the date on the Events Calendar.
4. Double click the date in question.
5. Add a +% Sales, if desired.
6. To rename the Event, double click the existing name and type in the desired name.
7. Click [Update] to Save Changes to the Holiday and Special Event.
8. Click [Exit] to close the interface.

Weekly Forecast – Key Features

Weekly Forecast provides projections for a selected week, while maintaining the sorting options of the Daily Forecast for each date in that week. Weekly Forecast provides the ability to view a full week of daily sales forecasts in one view. The productivity goal is adjustable for each individual day of the week respectively. The forecast shows information about Sales projections, Staffing Projections, as well as man-hour projections based on Productivity.

To expand the cells, and view the selected Projection Dates for the Day in question, click [+]. This will list each day in the Projection Week, while also listing the dates selected for that day’s individual Projection.

Use: Use the Calendar Wizard to select the date of the Weekly Forecast.
Weekly Forecast – Setup

No additional setup is required for the Weekly Forecast.

Staffing Chart

The staffing chart will provide the ability to select a minimum and maximum staff and a minimum and maximum sales amount. This will allow the Daily Sales Projection to recommend a minimum and maximum number of employees needed, based on the Sales Average for that day. Employee scheduling can be based on this chart, if desired.

<table>
<thead>
<tr>
<th>Min Sales</th>
<th>Max Sales</th>
<th>Min Staff</th>
<th>Max Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
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<td>3</td>
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<tr>
<td>400.00</td>
<td>425.00</td>
<td>12</td>
<td>16</td>
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</tbody>
</table>

To Edit the Staffing Chart
1. Double Click the Min Sales amount to change, enter new amount in whole numbers. Format: 00.00
2. Double Click the Max Sales amount to change, enter new amount in whole numbers. Format: 00.00
3. Double Click the Min Staff amount to change, enter new amount in whole numbers, no decimals. Format: 1
4. Double Click the Max Staff amount to change, enter new amount in whole numbers, no decimals. Format: 1
5. Click [Save Changes] to apply the changes made.
Sales Analysis – Key Features

Sales Analysis allows the user to view a daily breakdown of Projected Sales/Actual Sales Variance, Projected Man Hours/Actual Man Hours Variance, and the Employee Schedule for the selected date. All information is calculated by hour.

**Projected Sales:** Mirrors the Daily Forecast Projected Sales for the date selected.

**Actual Sales:** Reports the Actual Hourly Sales for the date selected. Actual Sales updates at the End of Day Sync.

**Sales Variance:** Reports the variance amount between Projected Sales and Actual Sales for the date selected.

**Man Hours Min:** Based on the Staffing Chart, provides the minimum recommended number of Man Hours based on each hour’s Projected Sales.

**Man Hours Max:** Based on the Staffing Chart, provides the maximum recommended number of Man Hours based on each hour’s Projected Sales.

**Actual Man Hours:** Actual Man Hours calculated based on the Timeslots listed in the Timesheet.

**Man Hour Variance:** Reports the variance between the Man Hours from Man Hours Min/Max Projection and Actual Man Hours worked based on the Timesheets.

**Use:** Use the Calendar Wizard to select the viewing Date. Defaults to the last date of End of Day Sync.
Employee Schedule

Daily Schedule – Key Features

The Daily Schedule reports Projected Sales and Man Hours, but also allows the user to create a schedule for the selected date. Each employee can be assigned a position, listed in the Position column, which is color-coded for easy viewing.

**Assign Emp:** Allows the user to assign the selected slot to an employee. This list contains all employees in the E2 Management Suite, and will keep a running WTD hours total for each.

**Projected Sales:** Mirrors the Daily Forecast Projected Sales for the date selected.

**Man Hours Min:** Based on the Staffing Chart, provides the minimum recommended number of Man Hours based on each hour’s Projected Sales.

**Man Hours Max:** Based on the Staffing Chart, provides the maximum recommended number of Man Hours based on each hour’s Projected Sales.

**Employee Scheduled Times** are entered here

**Assigned Positions** determine the color of the timeslots

**Total Projected Sales Indicator**

**Scheduled Man Hours and Labor Wages** are computed based on the schedule.
Daily Schedule – Setup

**Navigation:** [Edit] > [Application Settings] > [Scheduling Setup]

**Night shift starts at:** Allows the user to set the Night Shift starting time. If used in conjunction with the “Sort in Daily Schedule” option “Day, Night Shift”, allows the Daily Schedule to be sorted according to the Day/Night Shift, rather than by slot.

**Alert when scheduled WTD Hours:** Allows the user to flag any timeslot for an employee that is approaching Overtime while creating the schedule. Flags with XX

**Display in Military Time:** Allows the hourly cells in the Daily Schedule to be displayed in Military Time.

**Show Grid Line in Daily Scheduling:** Toggles the Grid Lines for the hours in the Daily Schedule.

**Alternate color on even row:** Displays even rows on the Weekly Schedule in alternating colors...for ease of viewing.

**Based on Staffing Chart:** Allows the Projected Forecast to recommend Min/Max employees based on the Staffing Chart settings.

**Based on Productivity:** Allows the Projected Forecast to recommend Min/Max employees based on a Productivity $ Amount.

**View Single Parameter:** Allows the user to select viewing either the Man Hours Min or Max line, rather than both on the schedule.

**Position Chart:** Allows the user to assign the colors to each of the positions for the scheduled slots and the Position Chart. **Use:** Right Click the desired position to select it’s associated color.

**Sort in Daily Schedule:** Allows the user to sort the Daily Schedule by SSN, Position, or Shift (requires Night Shift start to be set)

**Sort in Employee List:** Allows the user to sort the Employee list by Name or SSN.

**Capable Working Hours:**
- Track employees who are less than 18 years old.
- AND, Limit to 8 hours a day.
- AND, Don't schedule them to work later than 07:00 PM everyday.

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**Note:** When assigning Employee Times, the WTD (Week to Date) hours will increment as the schedule for that employee is made. This allows easy tracking of Overtime for each employee being scheduled.
To Create a New Daily Schedule

1. Using the Calendar Wizard, navigate to the date needed
2. Click [Assign Emp]
3. Select the Slot to Assign
4. Double Click the Employee Name from the Employee List. This will draw a line through the Employee’s name and insert the name into the selected slot.
5. Left Click, hold, and drag the cursor over the times that employee should work. To delete a block of time, simply highlight the block desired and press [Delete] on the keyboard.

**Note: Each hour is broken into (4) 15-minute increments for scheduling.**

6. Repeat steps 3-5 until all employees are assigned to the schedule with the desired times.
7. Click [Save Changes] to complete the schedule.

**Note: XX through an employee’s timeslot indicates that either the employee is unavailable (based on Availability option), or they are Under Age as indicated by the Application Settings.**

To Save a Daily Schedule as a Template

1. Create a Daily Schedule.
2. Right Click that schedule and select [Save as Template]
3. Enter the desired Name of the Template
4. Select the Date associated with this template
5. Click [Save]. This will save the selected Date’s Schedule as a Template that can be used in creating future Daily Schedules.

To Load a Schedule Template

1. Using the Calendar Wizard, select the date for scheduling.
2. Right Click that schedule and select [Load from Scheduled Template]
3. Select the desired Template from the list of Saved Templates
4. Click [Load]. This will load the selected template onto the selected Date. Any slot can be modified once the template is loaded.

To Delete Current Schedule

1. Using the Calendar Wizard, select the date desired
2. Right Click that schedule and select [Delete all schedule for the Day]
3. Click [Yes] to delete the selected date’s schedule. This will delete all scheduled slots.
To Delete a Schedule Slot

1. Using the Calendar Wizard, select the date desired
2. Select the slot to delete
3. Right Click that slot and select [Delete Current Selected Slot]
4. Click [Save Changes] to delete the selected slot

To Assign Position

1. Using the Calendar Wizard, select the date desired
2. Select the scheduled slot to which a position will be assigned.
3. Right Click and select the [Assign Position] drop down
4. Select one of the 5 available positions: Manager, Assistant Manager, Kitchen, Fountain, and Carhop. This will change the Position on the selected slot, as well as color-code the scheduled time appropriately.

To Copy a Schedule

1. Using the Calendar Wizard, select the date whose schedule you wish to copy
2. Right Click and select [Copy Schedule to…]
3. Select the date to which the schedule will be copied
4. Click [Save] to copy the selected schedule to the selected date.

To Move a Schedule

1. Using the Calendar Wizard, select the date whose schedule you wish to move
2. Right Click and select [Move Schedule to…]
3. Select the date to which the selected schedule will be moved
4. Click [Save] to move the selected schedule to the selected date
Position Chart – Key Features

Position Chart allows the user to schedule employees for a week, based on Position in the location. All Daily Schedules set for the currently selected range will display in the Position Chart, and vise versa.

**Remark:** Allows entry of comments about the currently selected Position Chart. Will populate in the Weekly Schedule Report.

Position Chart – Setup

**To Schedule a Weekly Position Chart**

1. Navigate: [Labor Information] > [Employee Schedule]
2. Click [Position Chart]
3. Using the Calendar Wizard, select the week for which to create the schedule
4. Click [Assign Employee]
5. Left Click the slot for the day/position you wish to assign
6. Double click the employee name from the list. This will draw a line through the employee’s name, and insert them into the selected slot
7. Double click the cell next to the Employee Name and select the Start Time
8. Double click the cell next to the Start Time and select the End Time
9. Repeat steps 5-8 for each day/position of the week for each desired employee
10. Click [Save Changes] and [Next] to save the Position Chart for the selected week

**To View Daily Schedule Parameters**

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week in question
3. Right click and select [View Daily Schedule Parameters]. This will toggle the Projected Dales, Man Hours Min/Max and Scheduled Man Hours/Labor Wages parameters at the bottom of the Position Chart.
To Save Position Chart as a Template

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week in question
3. Schedule a Weekly Position Chart, as needed
4. Right click and select [Save as Template]
5. Enter the “Name of Template”
6. Select the Week to which this Template will be saved on the Calendar Interface
7. Click [Save] and [Ok] to save the currently selected Position Chart as a Template

To Load a Position Chart from a Template

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week in question
3. Right click and select [Load from Template]
4. Select the Template to load, click [Load]
5. Click [Save Changes] and [Next]
6. Select the week to which the Template will be saved
7. Click [Save] to load the selected Template to the selected week.

To Copy a Position Chart

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week whose schedule you wish to copy
3. Right Click and select [Copy Schedule to…]
4. Select the week to which the schedule will be copied
5. Click [Save] to copy the selected schedule to the selected date.

To Move a Position Chart

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week whose schedule you wish to move
3. Right Click and select [Move Schedule to…]
4. Select the date to which the selected schedule will be moved
5. Click [Save] to move the selected schedule to the selected date

To Delete a Schedule Slot

1. Navigate: [Labor Information] > [Employee Schedule] > [Position Chart]
2. Using the Calendar Wizard, select the week desired
3. Select the slot to delete
4. Right Click that slot and select [Delete Current Selected Slot]
5. Click [Save Changes] to delete the selected slot
### Weekly Schedule – Key Features

#### Weekly Schedule – Weekly Schedule

Weekly Schedule displays a Weekly view of either Daily Schedules or the Position Chart. This allows an at-a-glance look at the Week’s schedule, with collapsible cells for each day of the week and a Total of the Week’s Scheduled Hours.

#### Weekly Schedule – Setup

No additional setup is required for the Weekly Schedule… all slots are scheduled in the Daily or Position Chart.

#### Availability – Key Features

Availability Options allow the user to set times during which an Employee is NOT available to work. This can be done on a recurring or special basis. Recurring Events would be set and would automatically reoccur until deleted (Example: An Employee has school every Tuesday/Thursday from 8am-Noon). Vacation or Special Events would be set and would occur only once (Example: An Employee has scheduled a vacation day or a day off). If Employee Availability is set, and that Employee is scheduled to work, the Daily Schedule will indicate with XX through the Timeslot.
Recurring Events

To Set a Recurring Event

1. Navigate: [Labor Information] > [Employee Schedule] > [Availability]
2. Select the [Recurring Event] Tab
3. Select the desired Employee from the Employee List
4. Left click, hold, and drag over the time to select the day/times. Times are in 30-minute increments. Increments may be deleted by simply right clicking the increment.
5. Click [Update] to save that Employee’s Availability.
6. Repeat steps 3-5 until all Recurring Events are set
7. Click [Exit] to close the Employee Availability Interface

To Delete/Edit a Recurring Event

1. Navigate: [Labor Information] > [Employee Schedule] > [Availability]
2. Select the [Recurring Event] Tab
3. Select the desired Employee from the Employee List
4. Right click to delete/edit the set Availability times for the selected Employee
5. Click [Update] to save that Employee’s Availability
6. Repeat steps 3-5 until all Recurring Events are deleted/edited
7. Click [Exit] to close the Employee Availability Interface
Vacation or Special Events

To Set Vacation or Special Event

1. Navigate: [Labor Information] > [Employee Schedule] > [Availability]
2. Select the [Vacation or Special Event] Tab
3. Select the desired Employee from the Employee List
4. Select the desired date on the Calendar Interface. This will insert that day on the Event List
5. Click [All Day] to set the Event as an All Day Event; meaning the Employee will not be available for that entire day. If it is not an All Day Event, deselect [All Day] and enter the Start Time and End Time. The Employee will not be available for only the selected Time(s).
6. Click [Update] to save that Employee’s Availability.
7. Repeat steps 4-5 until all Vacation or Special Events are set for the selected Employee
8. Repeat steps 3-7 for all desired Employees
9. Click [Exit] to close the Employee Availability Interface

To Delete/Edit a Recurring Event

1. Navigate: [Labor Information] > [Employee Schedule] > [Availability]
2. Select the [Vacation or Special Event] Tab
3. Select the desired Employee from the Employee List
4. Select the Vacation or Event date on the Calendar Interface. To remove the entire day, simply click the blue square on the Calendar. This will remove that day from the Event List. To edit the times on a scheduled day, select the date from the Calendar, which will remove that date from the Event List, then reinsert the date with the corrected time(s).
5. Click [Update] to save that Employee’s Availability.
6. Repeat steps 4-5 until all Vacation or Special Events are deleted/edited for the selected Employee
7. Repeat steps 3-5 for all desired Employees
8. Click [Exit] to close the Employee Availability Interface
Contact Numbers for Order Matic

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