



Patent Pending

Scheduling

DYNAMIC SCHEDULING allows you to customize your employee's and shop's days, times, and hours. In addition, you can customize your shop's work week. You can define the days and hours that each of your employees work in a standard business week, schedule any days or part of a day the shop will be closed, and modify employees daily schedules which may include leave, vacations, sick days, etc.

DYNAMIC SCHEDULING is located under the OPTIONS < SCHEDULING menu.

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Dynamic Scheduling:

Base Settings **Default Schedules** **Closed Days** **Weekly Schedules**

Start Day: The first day of your Work Week.

Shop Days: The number of days your shop is open per week.
This is the number of days your shop is open per week. It is used to help calculate personal daily goals.

End Day: The day your work week ends.
This is the last day of the week that your techs will be able to enter time and have it counted toward the goal for the current week. All time entered after this day will count toward the following week.

Start Time: The time of day your work day starts. :
This setting, along with the Shop Hours setting below, helps to calculate real-time "optimal" goals.

Shop Hours: The number of hours in a normal work day for your shop.
This is the number of hours in a normal work day for your techs. Together with the Start Time above, it helps to calculate real-time "optimal" goals.

Scheduling

Once you are in DYNAMIC SCHEDULING you see four tabs. The BASE SETTINGS tab, the DEFAULT SCHEDULES tabs, the CLOSED DAYS tab, and WEEKLY SCHEDULES tab.

The first tab is the BASE SETTINGS tab. Here is where you assign your shop's START DAY, SHOP DAYS, END DAY, START TIME and SHOP HOURS.

The first setting is START DAY setting. This setting is where you assign the first day of your work week by selecting it from the START DAY drop down box.

The second setting is the SHOP DAYS setting. This setting is where you assign the number of days that your shop is open for business per week. The SHOP DAYS setting is used to help calculate PERSONAL DAILY GOALS. **Note:** If the SHOP DAYS setting is changed, SCHEDULING data will be cleared and will need to be edited as well.

The third setting is the END DAY setting. This setting is where you assign the day your work week ends. It is the last day of the week that your Technicians will be able to enter time and have it counted toward the goal for the current work week. Any time entered after this day will count toward the following work week.

For example, you can have a START DAY set to Monday; SHOP DAYS set to 5, and have an END DAY of Saturday. In other words, from the example just mentioned, your shop can be a Monday through Friday shop but if time is entered on a Saturday then that time is credited on that day for the current work week.

The fourth setting is the START TIME setting. This setting is the time of day that your work day starts. This setting, as well as the SHOP HOURS setting, helps to calculate real-time "OPTIMAL" goals.

The fifth setting is the SHOP HOURS setting. This setting is the number of hours your shop is usually open for business. It is also the number of hours in a standard work day for your Technicians. This setting, as well as the START TIME setting, helps to calculate real-time "OPTIMAL" goals.

The screenshot displays the 'Dynamic Scheduling' interface with the 'Base Settings' tab selected. The navigation bar at the top includes links for HOME, COMPACT, TOOLS, OPTIONS, VERIFY, ANALYTICS, SCOREBOARD, LOGOUT, USERS, WORK CODES, ADCODES, SHOP, DISCOUNT, and SCHEDULING. The 'Base Settings' tab is active, showing the following configuration:

- Start Day:** The first day of your Work Week.
- Shop Days:** The number of days your shop is open per week.
This is the number of days your shop is open per week. It is used to help calculate personal daily goals.
- End Day:** The day your work week ends.
This is the last day of the week that your techs will be able to enter time and have it counted toward the goal for the current week. All time entered after this day will count toward the following week.
- Start Time:** The time of day your work day starts. :
This setting, along with the Shop Hours setting below, helps to calculate real-time "optimal" goals.
- Shop Hours:** The number of hours in a normal work day for your shop.
This is the number of hours in a normal work day for your techs. Together with the Start Time above, it helps to calculate real-time "optimal" goals.

A 'Save Changes' button is located at the bottom of the form.

Scheduling

The second tab is the DEFAULT SCHEDULES tab. This tab is where you define the days and hours that each of your employee's work in a standard week. These values will be used unless there are changes made for a specific week under CLOSED DAYS or WEEKLY SCHEDULES.

- The columns with a white background are days which fall within the shop's business week.
- The columns with a grey background are days which are outside of the shop's business week and the shop's work week. Any time entered within a grey column day will be credited to the following week's goal.
- The columns with an orange background are days which are outside of the shop's business days but fall within the work week. Any time entered within an orange column day will be credited to the current work week's goal.

After editing an employee's standard work week, click on the UPDATE button to confirm. If there is more than one employee's standard schedule to make changes to, click on the SAVE CHANGES button at the bottom of the page to confirm all employees' changes.

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Dynamic Scheduling:

Base Settings
Default Schedules
Closed Days
Weekly Schedules

Default Schedules are the hours that your employees work in a normal week. These values will be used in all cases where there are not changes made for a specific week.

= Business Week.
 = Outside of Work Week.
 = Outside of Business Week / Inside of Work Week.

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Bailey Tai 47 (TECH) Update	0	8	8	8	8	8	0
Bob Dickerson 97 (TECH) Update	0	8	8	8	8	8	0
Mike Wilson 63 (TECH) Update	0	8	8	8	8	8	0
Paul Seghposs 54 (TECH) Update	0	2	2	2	2	2	0
Ryan Roche 65 (TECH) Update	0	4	4	4	4	4	0
Luis Martinez 45 (SRVA) Update	0	8	8	8	8	8	0
Paul Seghposs (SRVA) Update	0	2	2	2	2	2	0

Save Changes

Scheduling

The third tab is the CLOSED DAYS tab. This tab is where you schedule any CLOSED DAYS when the shop will be closed for all or part of the day. Any company holiday scheduled should also be entered here. CLOSED DAYS can only be scheduled for the current and the following three weeks.

Check the SMALL BOX to the left of the WORK DAY that will be closed all or part of the day. Then tab over or click in the LARGE BOX and enter the number of hours your shop will be open on that day. Once check marked, the default number assigned is zero, which means that your shop is closed all day. If your shop will be open part of that day enter the number of hours your shop will be open. Employee schedules will be automatically adjusted on these days so that they can not be scheduled for more than the number of hours entered.

- The columns with a white background are days which fall within the shop's business week.
- The columns with a grey background are days which are outside of the shop's business week and the shop's work week. Any time entered within a grey column day will be assigned to the following week's CLOSED DAY schedule.
- The columns with an orange background are days which are outside of the shop's business week but fall within the current work week. Any time entered within an orange column day will be assigned to the current business week CLOSED DAYS.

After scheduling any CLOSED DAYS click on the SAVE CHANGES button at the bottom of the page to confirm your shop's CLOSED DAY schedule.

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Dynamic Scheduling:

Base Settings **Default Schedules** **Closed Days** **Weekly Schedules**

Closed Days are days where your shop is closed for all or part of the day. Checking the box under to a certain day will allow you to enter the number of hours your shop will be open on that day. The default is zero, which means that your shop is closed all day. Employee schedules will be automatically adjusted on these days so that they can not be scheduled for more than the number of hours entered.

= Business Week. = Outside of Work Week. = Outside of Business Week / Inside of Work Week.

<<< Prev **Sep. 29th through Oct. 3rd** Next >>>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>	<input type="checkbox"/> <input type="text"/>

Save Changes

Scheduling

The last tab is the WEEKLY SCHEDULES tab. This tab allows you to modify employee's daily schedules which may include leave, vacations, sick days, etc. You can specify what an employee's schedule will be for a specific week and are able to set schedules for the current and up to three weeks in the future. The default schedules are pre-filled for your convenience. If there is a CLOSED-DAY scheduled, you cannot enter more hours for that day than was scheduled for the CLOSED-DAY.

- The columns with a white background are days which fall within the shop business week.
- The columns with a light grey background are days which are outside of the shop business week and work week. Any time entered within a light grey column day will be assigned to the following work week schedule.
- The columns with an orange background are days which are outside of the shop's business week but fall within the current work week. Any time entered within an orange column day will be assigned to the current work week goals.
- Fields with a dark grey background are zero-hour closed days and cannot be changed. In other words, the shop is closed and no hours can be produced that day.
- Fields with a purple background are restricted hour closed days. The values are pre-set to be no more than the allowed number for that day. You cannot set these fields to more than the allowed value for that day. In other words, the shop is only open for the assigned hours (set in CLOSED DAYS) and no more than those hours can be produced for that day. However, scheduling fewer hours for these fields, if needed, is allowed.

After modifying an employee's temporary weekly schedule, click on the SAVE CHANGES button at the bottom of the page to confirm.

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Dynamic Scheduling:

Base Settings | Default Schedules | Closed Days | Weekly Schedules

Weekly schedules are for specifying an employee schedule for a specific week. You can set schedules up to three weeks in the future. The default schedules are pre-filled here for your convenience. If there was an off-day scheduled in the given week, you cannot enter more hours for that day than was allowed.

? = Business Week. ? = Outside of Work Week. ? = Outside of Business Week / Inside of Work Week.
 ? = Closed Day / Zero Hours. ? = Closed Day / Restricted Hours.

<<< Prev Sep. 29th through Oct. 3rd Next >>>

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Bailey Tai 47 (TECH) <input type="button" value="Update"/>	0	8	8	8	8	8	0
Bob Dickerson 97 (TECH) <input type="button" value="Update"/>	0	8	8	8	8	8	0
Mike Wilson 63 (TECH) <input type="button" value="Update"/>	0	8	8	8	8	8	0
Paul Seghposs 54 (TECH) <input type="button" value="Update"/>	0	0	0	0	0	0	0
Ryan Roche 65 (TECH) <input type="button" value="Update"/>	0	4	4	4	4	4	0
Luis Martinez 45 (SRVA) <input type="button" value="Update"/>	0	8	8	8	8	8	0
Paul Seghposs (SRVA) <input type="button" value="Update"/>	0	0	0	1	1	1	0