Manager Mobile App

timeforge

Smart tools for busy people

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Log in and navigate the app

The **TimeForge Manager mobile app** allows managers to view schedules, bid shifts, pending requests, messages, attendance, daily logs, and even review their sales and labor metrics, all from the convenience of a mobile phone or tablet.

This guide will teach you how to use the app and its features, including how to turn a mobile device into a TimeClock that can be used to clock employees in and out.

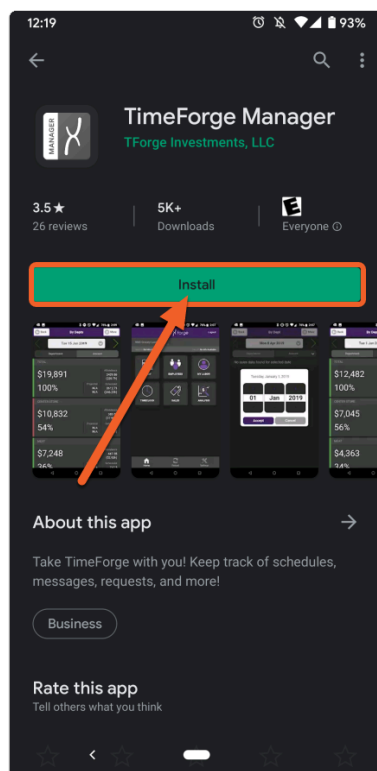⚠️ You will need a supervisor level account or higher in TimeForge to follow this guide.

Don't have the app yet? Here's how to get it.

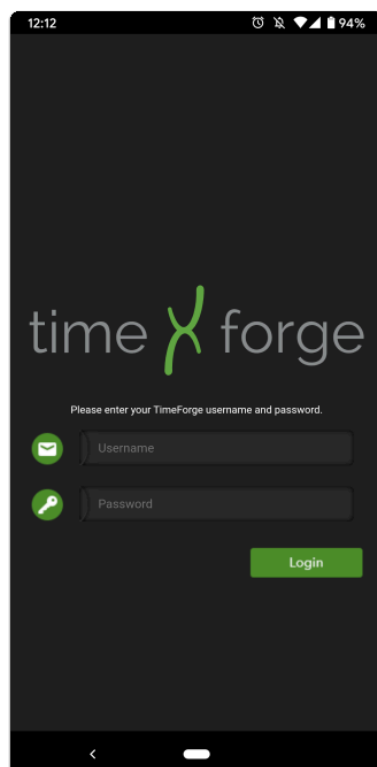### Search the Apple Store or Google Play store for the mobile app

1. If you're an iPhone or iPad user, open up the Apple Store on the device, OR if you're using an Android device, go to the Google Play Store.
2. Search for "TimeForge Manager" in the store. The app you are looking for should be the first result and should display a gray TimeForge logo.
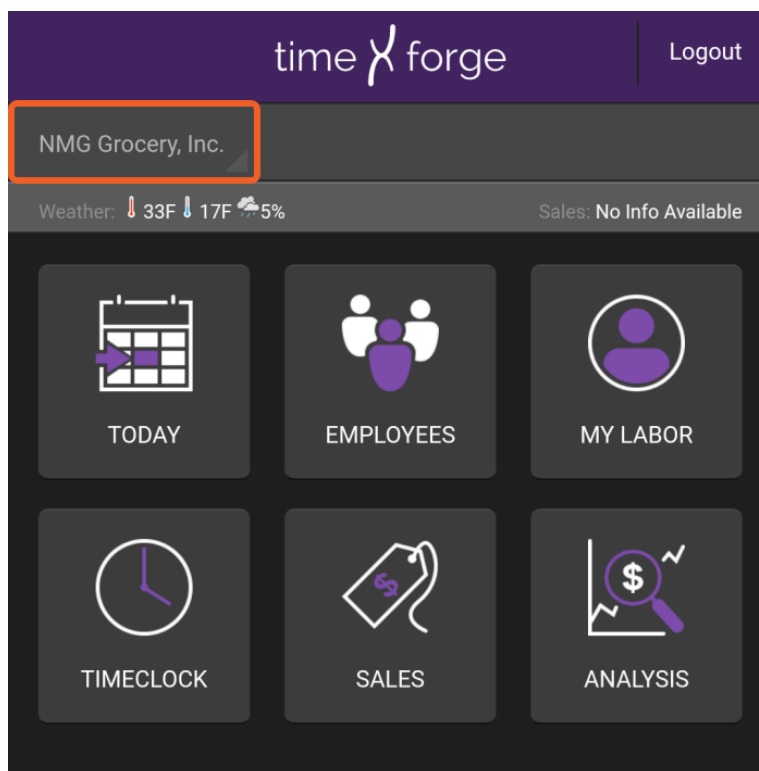
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3. Install the app.

Log into the app on your mobile device

To log in to the TimeForge Manager app, you will use the same username and password that you use for your TimeForge account when you log in from a browser.

Dashboard Home Screen

When you first log in, you should see the Manager app dashboard. Note the currently-selected location in the upper left:

💡 If you have access to more than one location in TimeForge, you can tap the location name and select a different location.

The dashboard home screen contains 6 buttons that can help you view how your business is running. These are:

- **Today**: view employee schedules, attendance, pending requests, open and pending shift swaps, bid shifts, messages, daily log entries, and more.
- **Employees**: view which employees are clocked in and call, text message, or email them right from your mobile device.
- **My Labor**: view your own schedules and attendance.
- **TimeClock**: swap between "TimeClock mode" and "Normal mode" and edit related settings.
- **Sales**: view your sales numbers versus projections and costs for each department individually or store wide.
- **Analysis**: see various graphs breaking down your sales, projects, and costs. You can also see how departments match up based on these numbers.
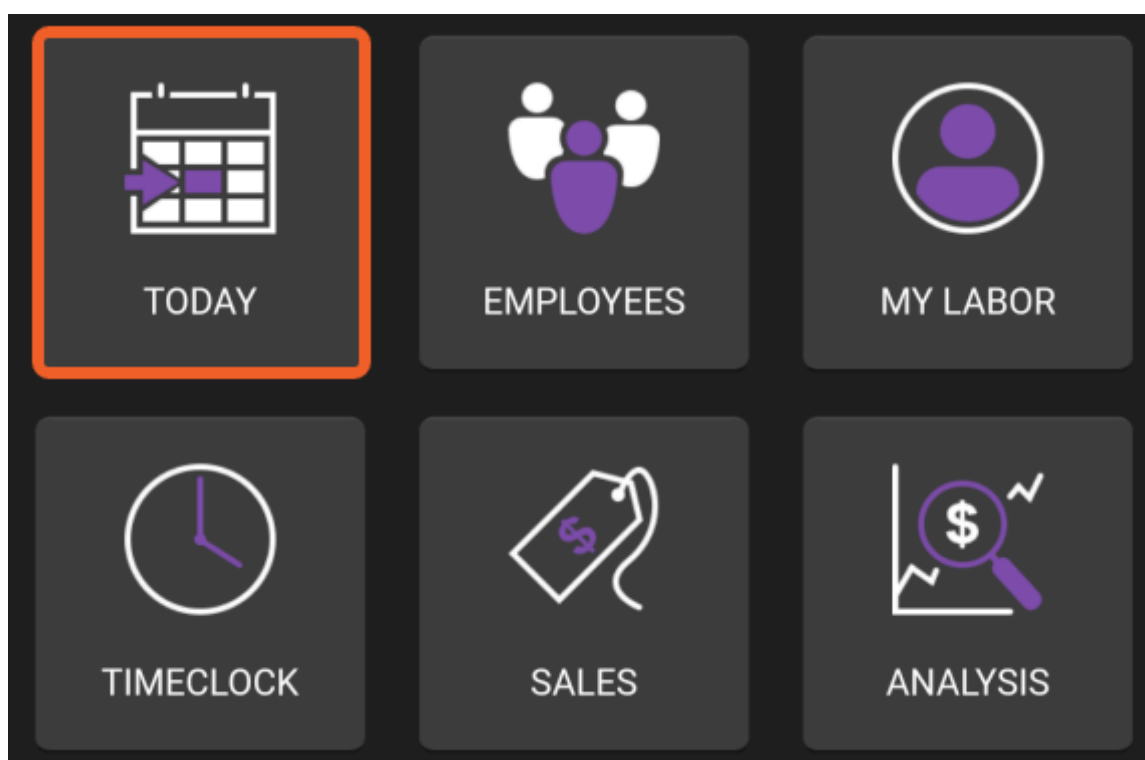
timeforge

The remainder of this guide is dedicated to showing you how to navigate these areas of the app to get the information you need.

Today Page Overview

The Today screen in the TimeForge Manager app presents many of the important pieces of information normally available through the browser, such as schedules, pending shift swaps, open shift swaps, bid shifts, pending requests, messages, attendance, and daily logs.
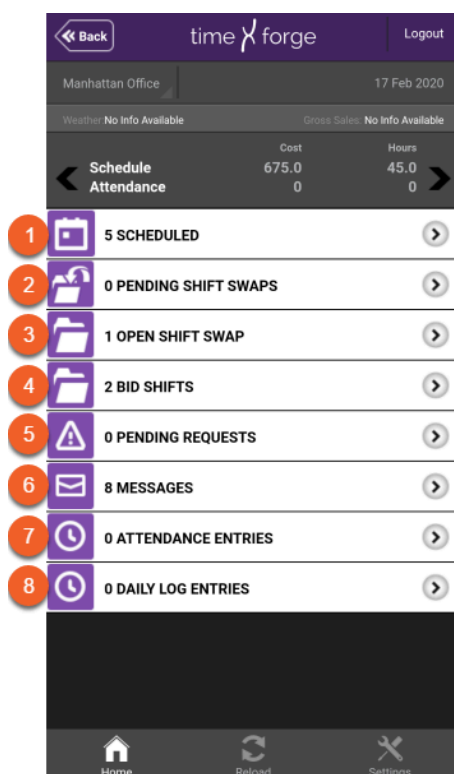
The Today Page in the app

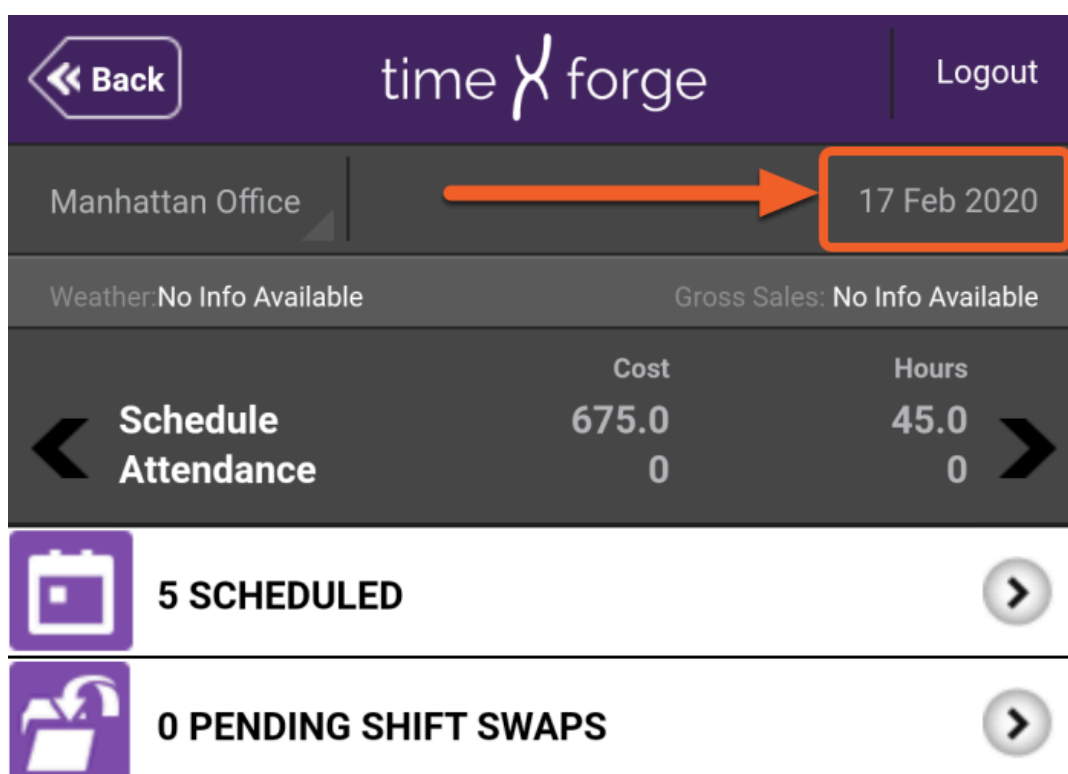To reach the **Today** page, tap the TODAY tile:
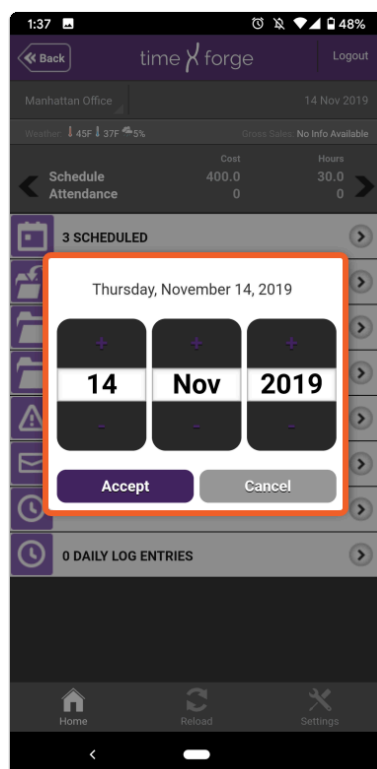

The **Today** page allows you to view:

1. Who is Scheduled
2. Pending Shift Swaps
3. Open Shift Swaps
4. Bid Shifts
5. Pending Requests for availability or time off
6. Messages you have received
7. Attendance / Time punches
8. Daily Log Entries

By default, the app will show the current date. To select a different day, tap on the date on the top right to bring up the slider.

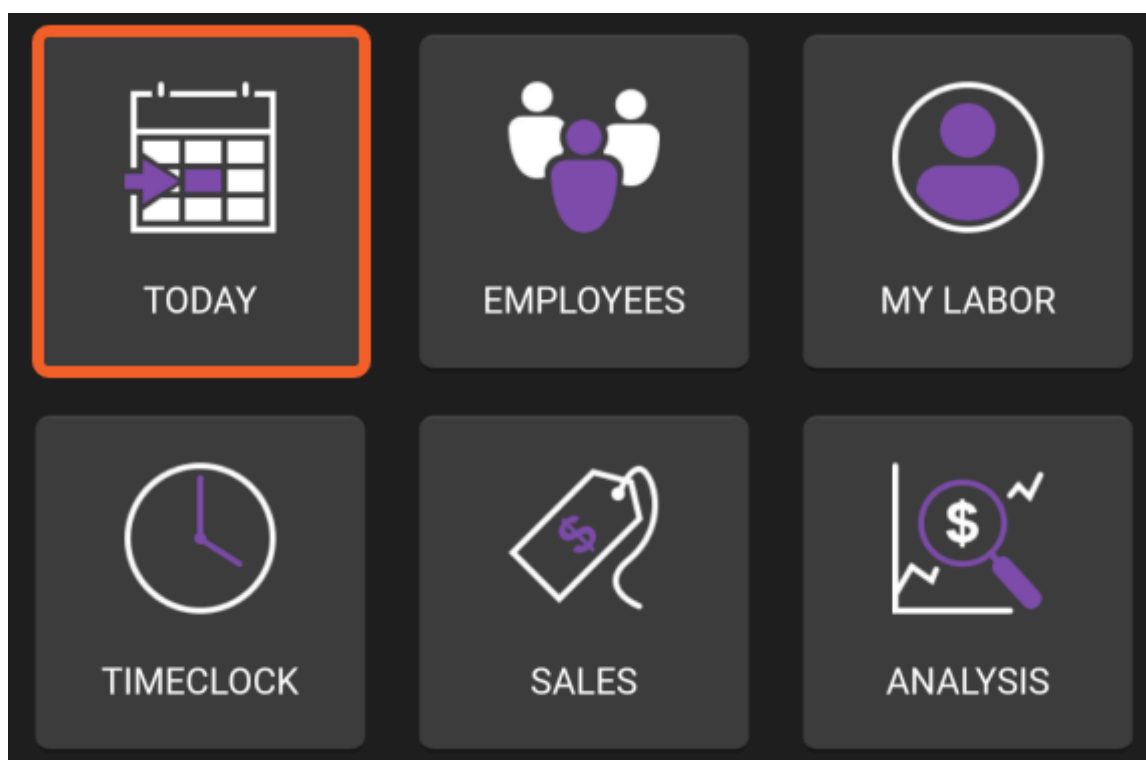Then, use the slider to select the desired date:

💡 Generally, if shifts aren't showing up, it's because you have your account set to the wrong day. Check to make sure you have the correct date set.
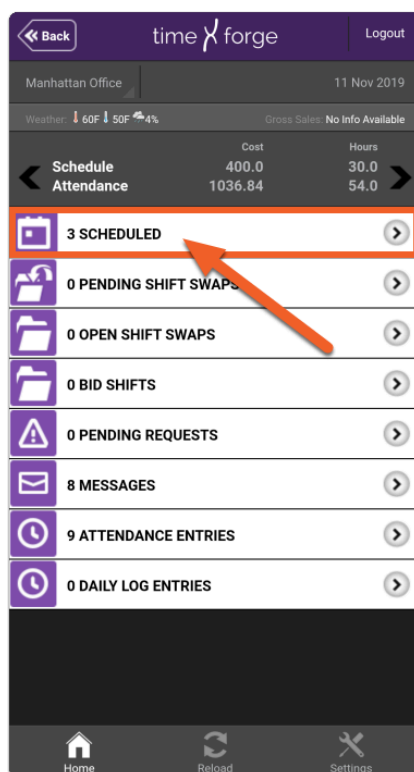
View, add, or edit employee shifts

The TimeForge Manager mobile app allows you to not only view shifts on your mobile device but also add new shifts, edit existing shifts, or remove them from the schedule entirely. Here's how.

Tap the TODAY tile and select Scheduled

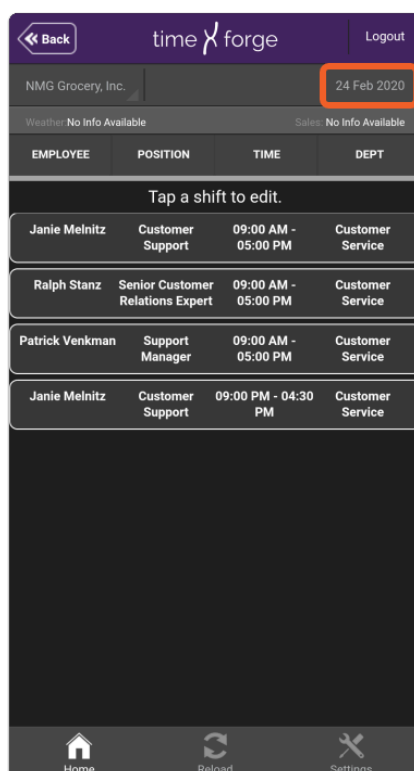Employee shifts are accessible from the Today page in the app. From the home screen, tap TODAY.

Then, tap **Scheduled**.
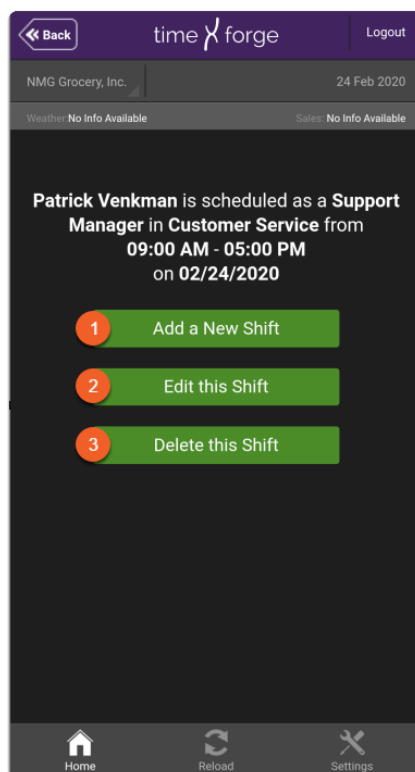
View employee shifts

You will see a list of employees scheduled to work for the selected date. By default, the page will open to the current day, but you can **tap the date** in the upper right corner to select a new date.

Add or edit employee shifts

Tap on a shift to bring up a list of options. You can:

1. Add a New Shift (will allow you to select an employee and other shift details)
2. Edit this Shift
3. Delete this Shift

Each of these options is described in more detail below:

1. Add a New Shift

When adding a new shift, the app will prompt you to select the department and schedule you wish to add the shift to. You'll then be able to select the appropriate employee, position, and start and end times.

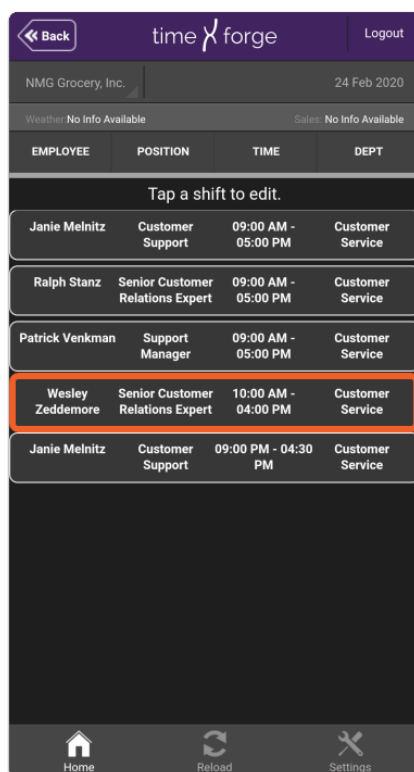In this example, we're adding a new shift to the Customer Service schedule for employee Zeddemore:

When you're done selecting the details for the shift, tap the **Add** button to add the new shift to the schedule.
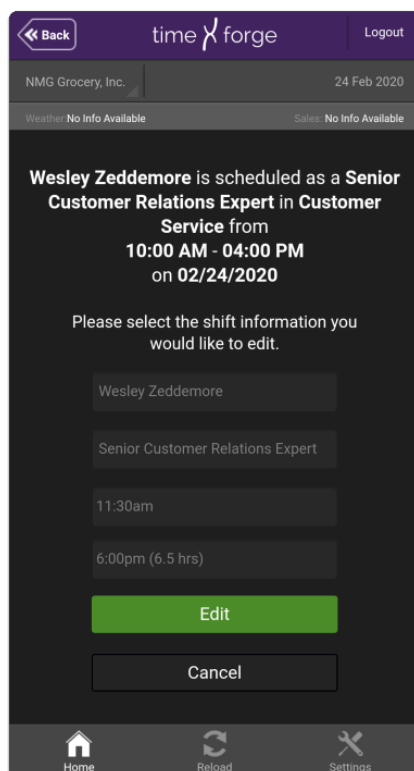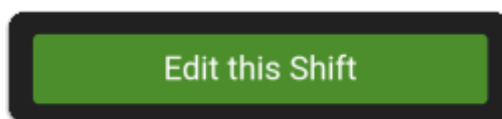
2. Edit this Shift

Edit allows you to select a new employee to work the shift or adjust the start or end times. For this example, we're going to keep employee Zeddemore on the schedule, but we just need to adjust his start and end times.

First, we'll select the new shift from the list:

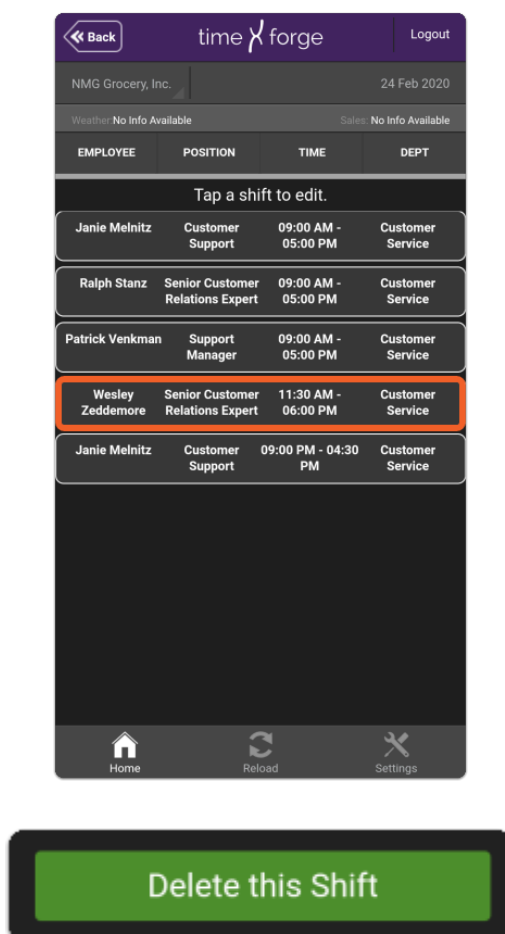Tap the **Edit this Shift** option, then select the appropriate details:

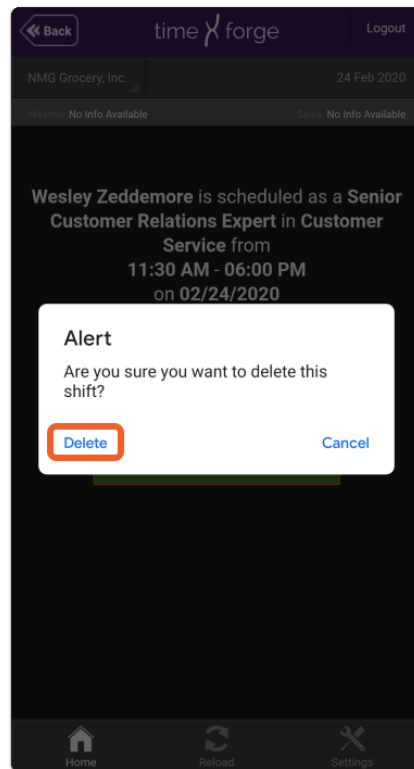When done, simply tap the **Edit** button to commit your changes.

3. Delete this Shift

Delete will completely remove the shift from the schedule. When deleting a shift, you will be prompted to confirm this choice.

Let's say we want to remove our new shift. First, we would select it from the list of scheduled shifts, then we would tap the **Delete this Shift** option.

Tap **Delete** to confirm your choice or **Cancel** to back out.
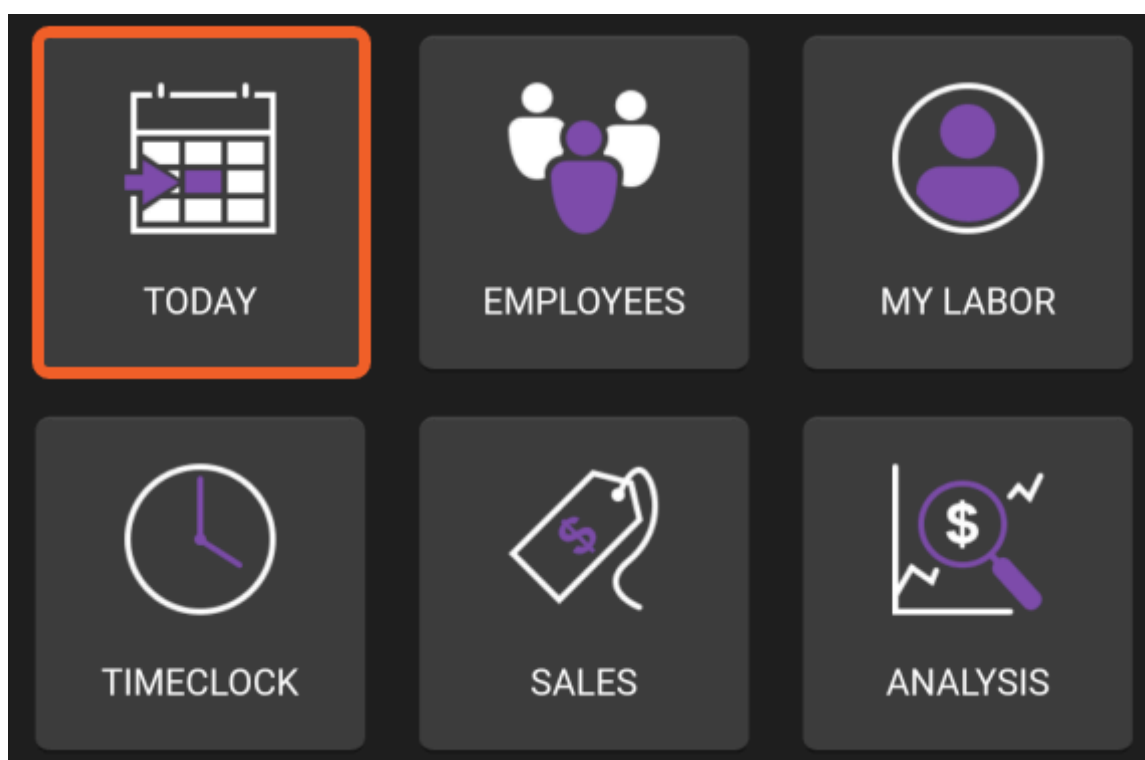
Review open and pending shift swaps

The TimeForge Manager mobile app can help you keep tabs on which shift swaps are still open and which ones are waiting on manager approval. All it takes is a few taps.

Shift Swaps are those that have been 'given up' and made available to be 'picked up' by other employees. When an employee picks up a shift swap, they are not responsible for that shift until the swap has been approved by management.

Shift swaps must be approved or denied on the TimeForge website, and employees can choose how to be notified about the approval of a swap.
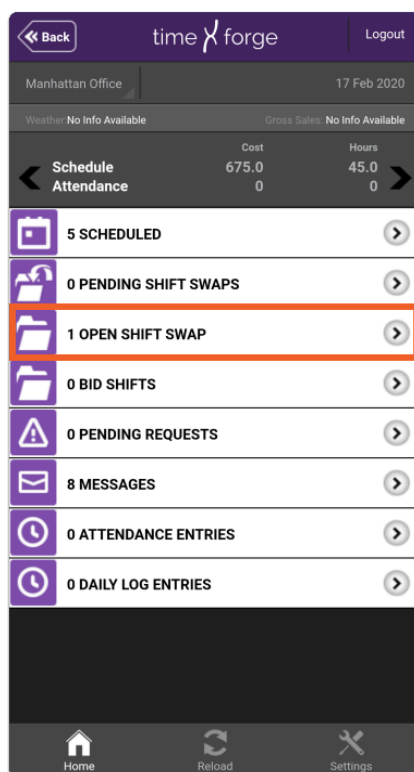
Tap the TODAY tile

Open and Pending Shift Swaps are accessible from the Today page in the app. From the home screen, tap TODAY.
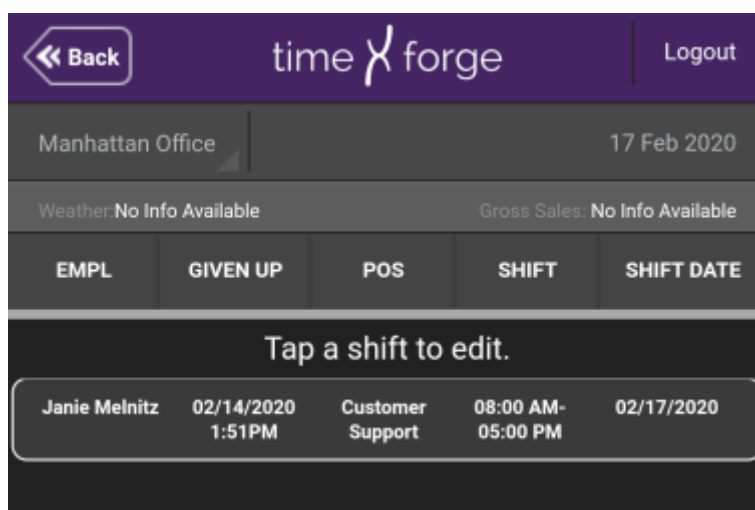

Open Shift Swaps

When an employee has given up a shift, you will see a notification next to Open Shift Swaps on your Today page:

Tapping Open Shift Swaps will show you a list of shifts that have been given up and are waiting to be picked up by other employees:
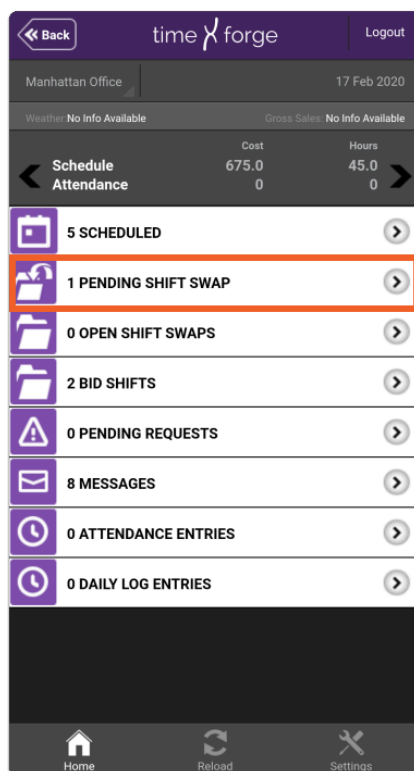

> 💡 If you have a long list of open shift swaps, you can use the buttons at the top to sort the list according to different criteria, such as by employee, when it was given up, position, etc.:
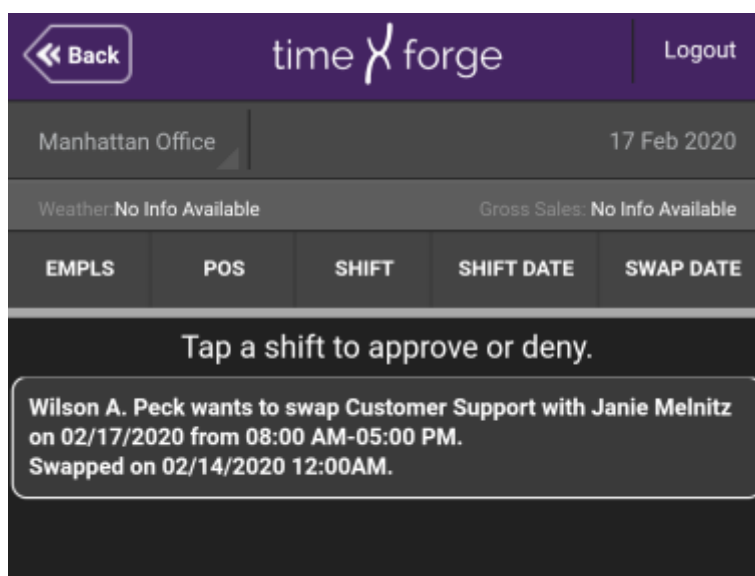
Pending Shift Swaps

> ℹ️ Pending Shift Swaps can only be approved or denied on the TimeForge website.

When another employee picks up an open shift, you will see a notification next to Pending Shift Swaps:

Tapping Pending Shift Swaps will show you a list of those waiting on manager approval.

Tapping a shift will redirect you to the TimeForge website where you can approve, deny, or edit the shift swap.
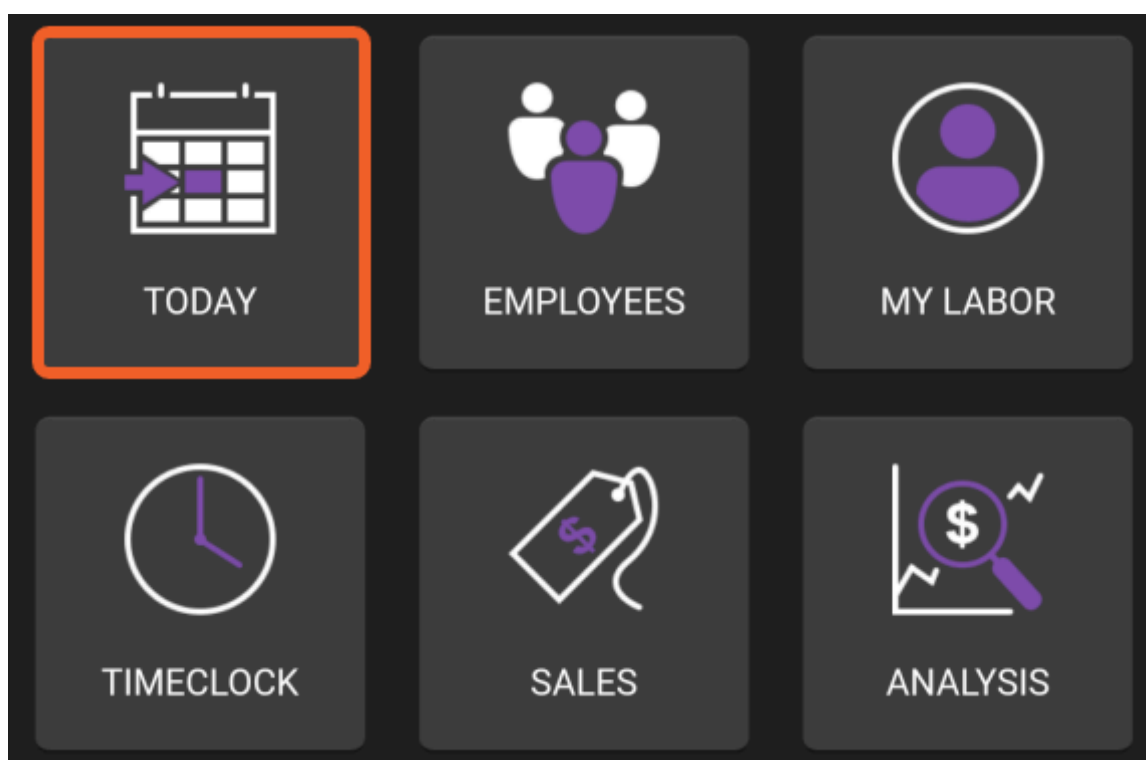
Review pending bid shifts

The TimeForge Manager mobile app allows you to view pending bids on any shifts you designate as Bid Shifts in TimeForge.

Bid shifts are those that can be bid on by qualified employees, allowing them some control and flexibility over their schedules. With Transfer Bids enabled, employees can even bid on and pick up shifts at nearby locations.
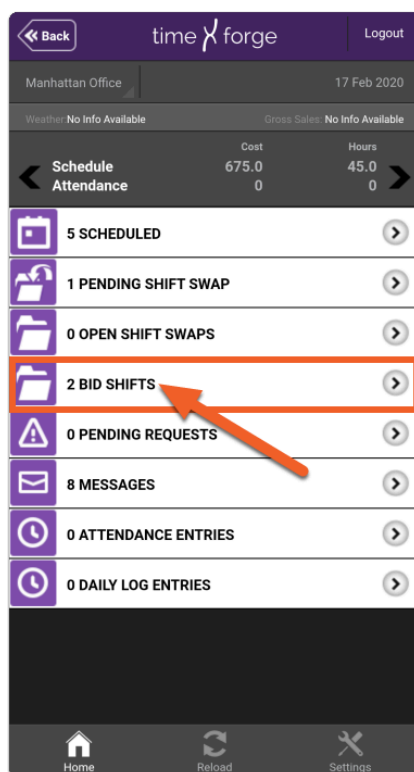
Bid shifts must be approved or denied on the TimeForge website, and employees can choose to be notified about the approval or denial of the shift.

Tap the TODAY tile, then tap Bid Shifts

Pending Bid Shifts are accessible from the Today page in the app. From the home screen, tap TODAY.
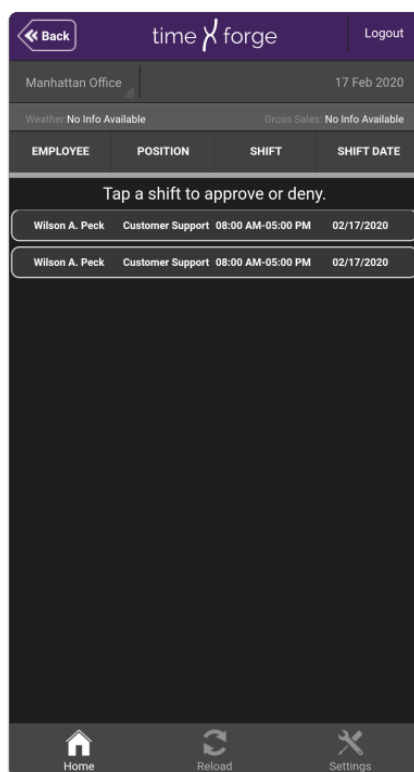

Then, tap **Bid Shifts**.

Pending Bid Shifts

ℹ Pending Bid Shifts must be approved or denied on the TimeForge website. Managers can also choose whether to automatically approve the first bid on a Bid Shift.

When employees bid on an available Bid Shift, you will see their bids in this list.

Tapping a shift will redirect you to the TimeForge website, where you can approve or deny a bid.

💡 If you have a long list of bid shifts, you can use the buttons at the top to sort the list according to different criteria, such as by employee, position, shift time, or shift date:

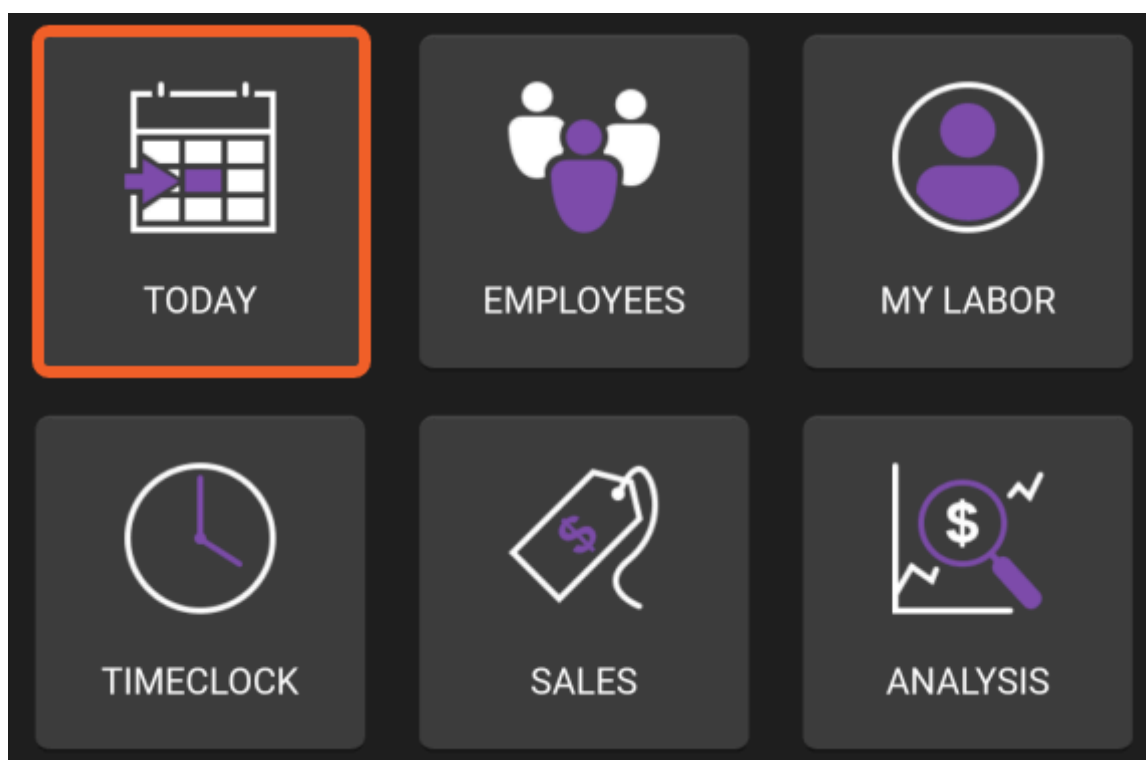# Review pending requests and availability

The TimeForge Manager mobile app allows managers to view employees' pending availability and requests for time off.
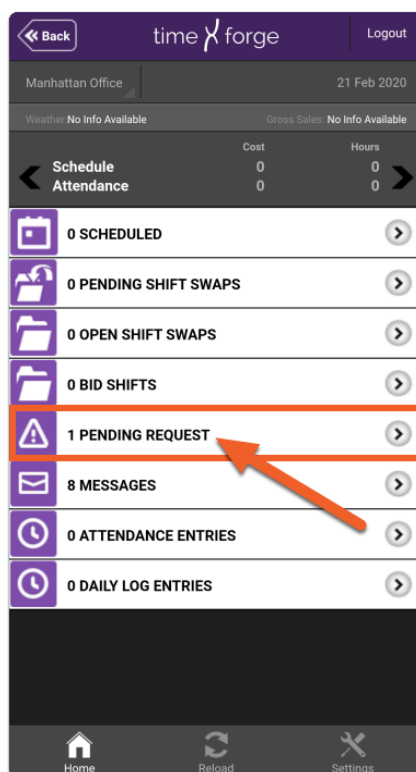
At this time, requests must be approved or denied on the TimeForge website, but the ability to manage requests through the mobile app is a feature we hope to provide in the future.

Tap the TODAY tile, then tap Pending Requests

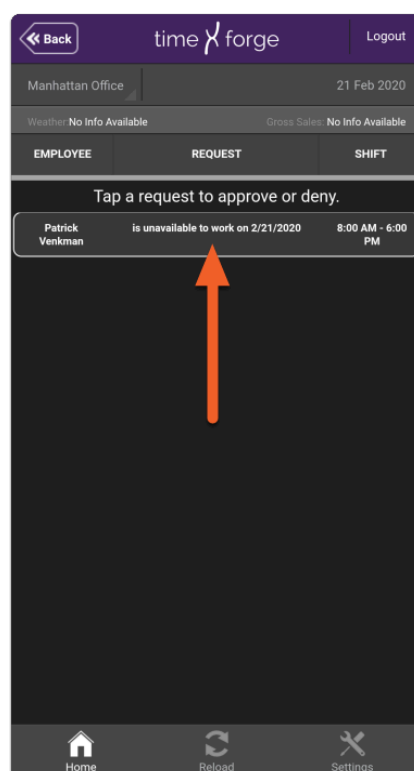Pending requests are accessible from the Today page in the app. From the home screen, tap TODAY.

Then, tap **Pending Requests**.

Pending Requests

> ℹ️ **Requests must be approved or denied on the TimeForge website.**

Pending requests will be shown, including the name of the employee, what time of request (e.g. available to work, wants to work, does not want to work, unavailable to work), and the date and times the request applies to.

💡 If you have a long list of requests, you can use the buttons at the top to sort the list according to different criteria:
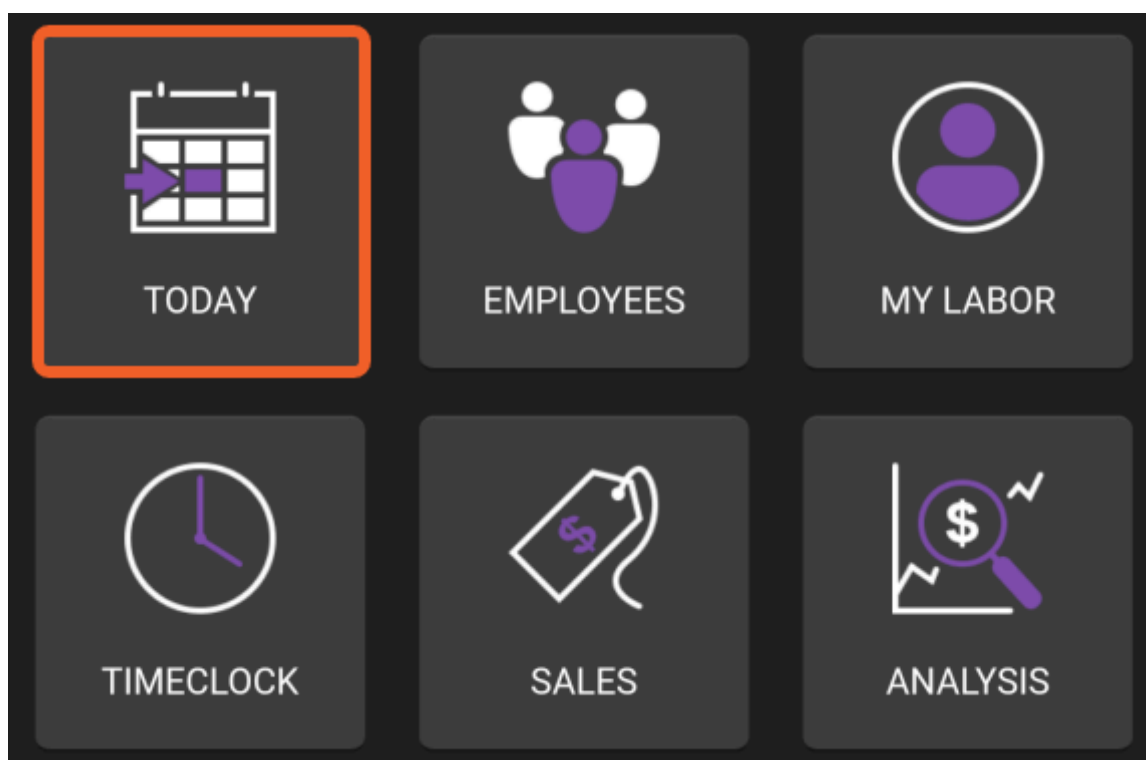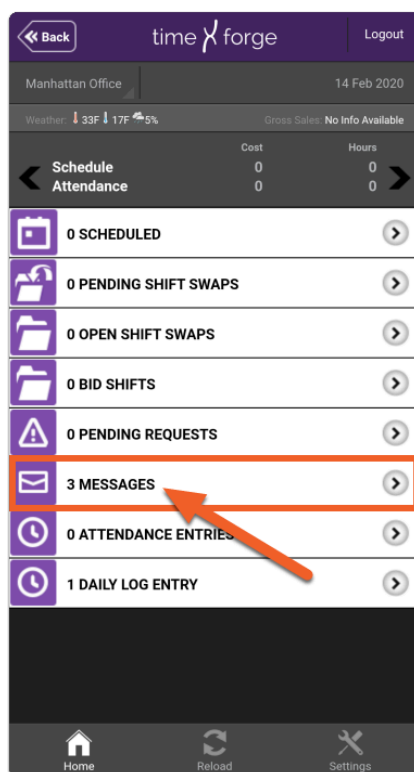
Read your messages

The TimeForge Manager mobile app allows you to read TimeForge messages through the app! Here's how.

Tap the TODAY tile, then tap Messages

Messages are accessible from the Today page in the app. From the home screen, tap TODAY.
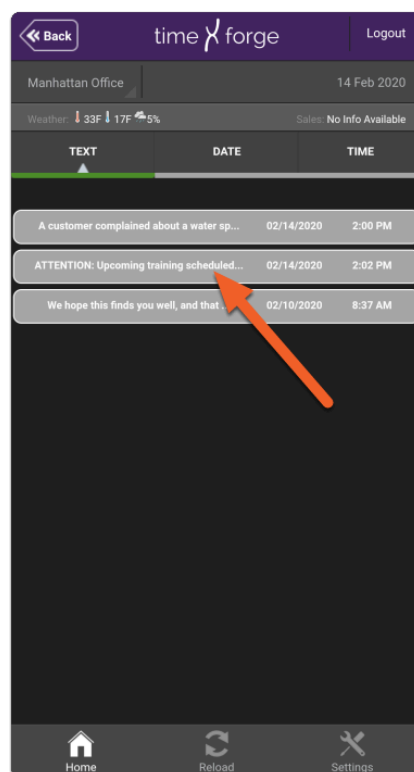

Then, tap **Messages**.

Select a message

This will show you any messages you have for the selected date (by default, the current day, "today"). You can use the date selector in the upper right to choose a different date.
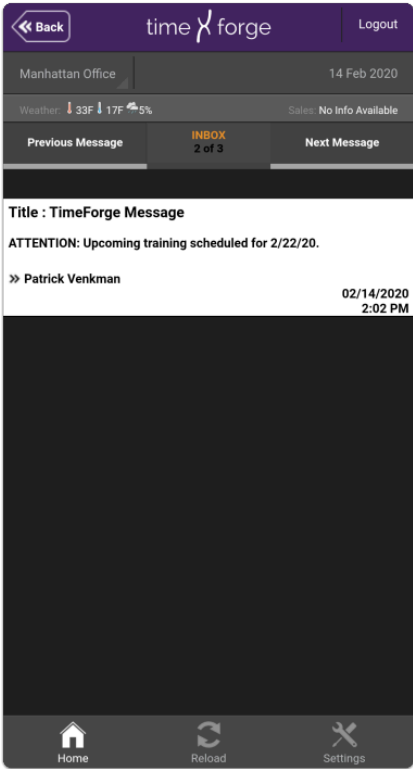
Tap on a message to read it.

Read the message

The message will be displayed on your mobile device. You can use the buttons to the left and right to view the Previous Message or Next Message in the list.

> 💡 Messages cannot be sent from this screen, but you can choose to call, text, or message an employee through the Employees tile on the home screen.
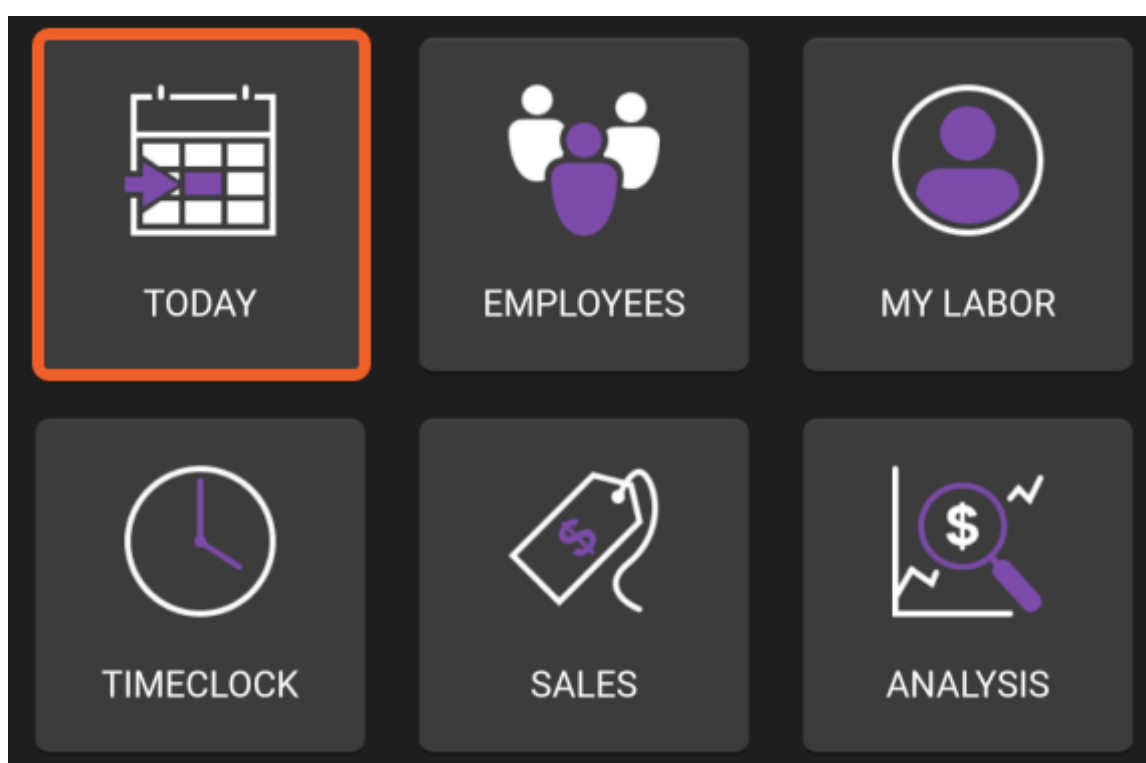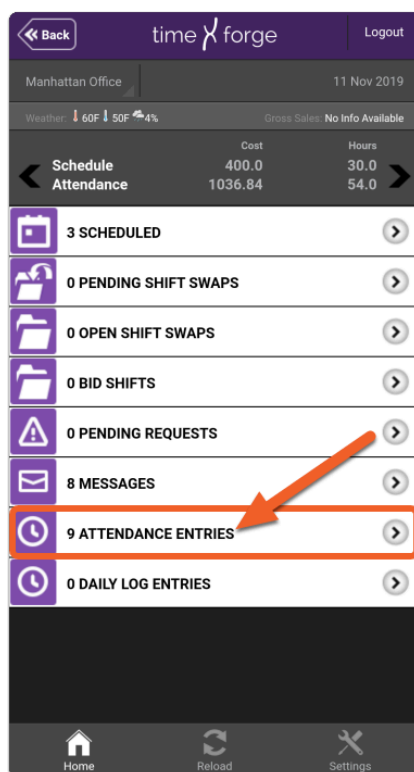
View employee attendance

The TimeForge Manager app allows you to view employee attendance (time punches) for a given date.

Tap the TODAY tile, then select Attendance Entries

Attendance Entries are accessible from the Today page in the app. From the home screen, tap TODAY.
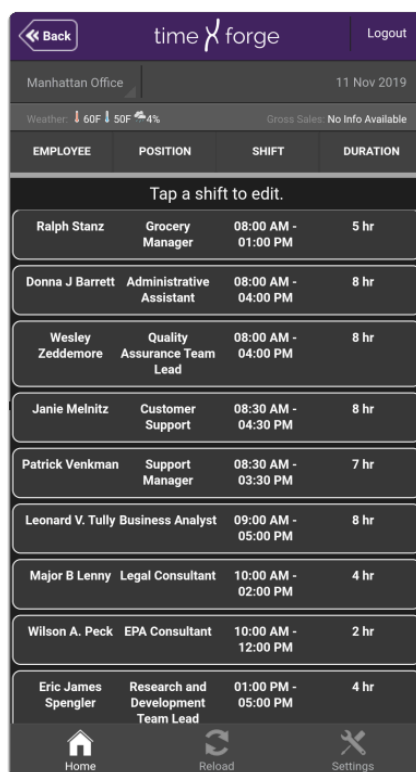

Then, tap **Attendance Entries**.

View your employees' attendance

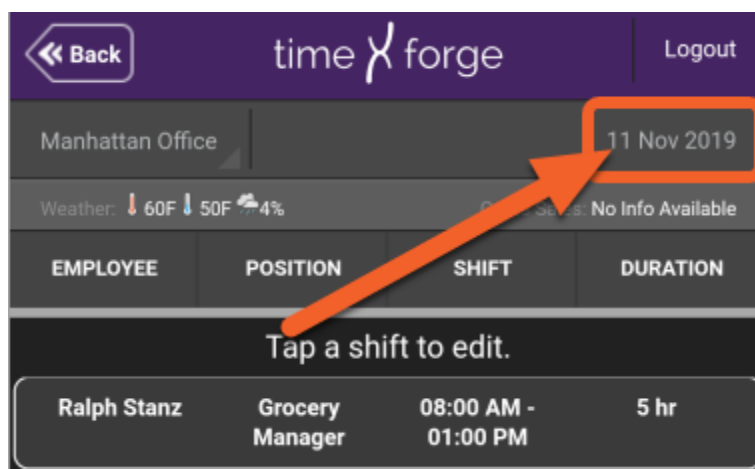ℹ Attendance can only be edited on the TimeForge website.

You will be shown all attendance for the selected date. If you tap an entry, you will be taken to the TimeForge website, where you can adjust attendance.

Remember, you can tap the date in the upper right corner to bring up the date selector:

View Daily Log entries

The TimeForge Manager app allows you to view Daily Log entries, such as reminders, staff notes, to-do lists, notices, training announcements, and more. Accessible from anywhere, the TimeForge Daily Log is a powerful tool for keeping track of daily notes, events, and tasks without relying on a pen-and-paper notebook, which can be lost, damaged, or stolen.

Tap the TODAY tile, then select Daily Log Entries

Daily Log Entries are accessible from the Today page in the app. From the home screen, tap TODAY.

Then, tap **Daily Log Entries**.

View the logs

ℹ️   Daily Log entries can only be added and edited on the TimeForge website.

You will be shown all logs for the selected date. If you tap an entry, you will be taken to the TimeForge website, where you can add or edit entries.

Remember, you can tap the date in the upper right corner to bring up the date selector:

View and edit employees

On the Employees screen, you can view who is clocked in or out. All it takes is a few taps. If the employee has an email address or phone number in TimeForge, you can also email or call/text them directly from your mobile device.

Tap the EMPLOYEES tile

From the home screen, tap the EMPLOYEES tile.

View your list of employees

You will see a list of employees for your current location (shown in the upper left), as well as their status (clocked in or out).

Tap an employee to see additional options

Tapping on an employee in the list will show you additional options, depending on whether the employee has an email or phone number associated with their TimeForge account:

1. If the employee has an **email address** associated with their account, you can email them using your mobile device's preferred email application by tapping their email address.
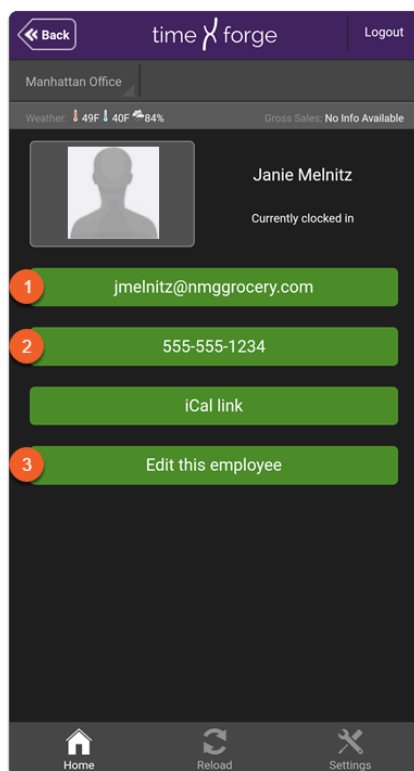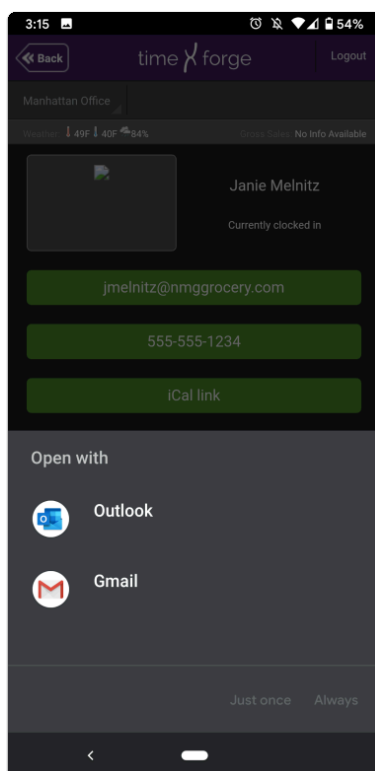2. If the employee has a **phone number** associated with their account, you can call or send them a text message by tapping their phone number.
3. Tapping the **Edit** button will take you to the TimeForge website, where you can view and edit the employee's information on file.

Tap the email button to send an email using your preferred email app on your device

If you have more than one email app on your device, you may be prompted to select which one you would like to use.

Tap the phone number button to call or text (SMS) using your mobile device

⚠️ Text messages may incur additional fees according to your mobile device plan. TimeForge is not responsible for any fees incurred this way.

Review your own schedule and attendance

On the My Labor screen, you can view your own schedules and attendance. You can even confirm or give up shifts.

Tap the MY LABOR tile

From the home screen, tap the MY LABOR tile.

Select Schedule or Attendance

You will have two options: SCHEDULE and ATTENDANCE. Note the location in the upper left.

Schedule

Under Schedule, you will see your shifts for the selected location and date. Remember, you can tap the date (upper right) to bring up the date selector.

Tapping on a shift will present options to Confirm or Give Up.

Attendance

Under Attendance, you will see your digital timecard.

ℹ Attendance entries can only be edited on the TimeForge website.

Enable and exit TimeClock Mode

The Manager App can be used as a mobile TimeClock. This is a very handy feature if the manager wishes to use this instead of a biometric device.

The TIMECLOCK tile has 3 buttons. These are:

1. **TimeClock Mode** - Enables TimeClock Mode. In this mode, the manager can clock employees in or out at will from a list. Read below to learn how to enable and exit this mode on your mobile device.
2. **Normal Mode** - Enables Normal Mode. In this mode, employees must use their own credentials to clock in/out.
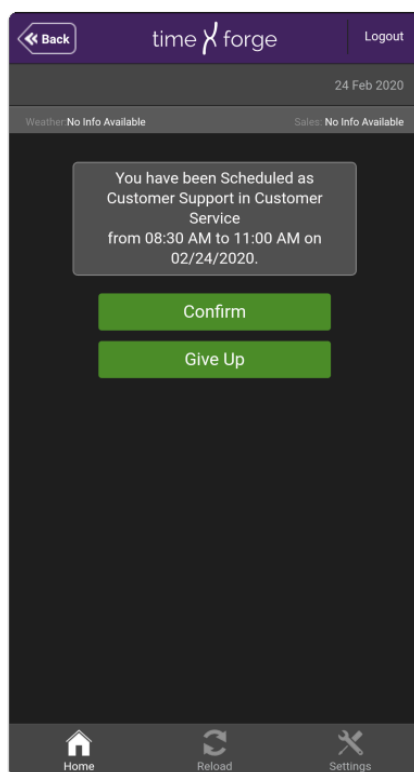3. **Settings** - Provides a few configurable options, such as your default location and turning manager mode on or off.

Tap the TIMECLOCK tile, then tap TimeClock Mode

TimeClock Mode, Normal Mode, and TimeClock Settings are all accessible from the TIMECLOCK page in the app. From the home screen, tap TIMECLOCK.

Then, tap the **TimeClock Mode** button to enable TimeClock Mode.

Inside TimeClock Mode

Once **TimeClock Mode** is entered, you will see a list of employees for that particular location and any available actions you may take, such as clocking in, clocking out, starting a break, or ending a break.

> 💡 To bring up a different location, just tap on the location picker in the upper left and select the desired location.

How do I exit TimeClock mode?

To exit the page, simply tap the **Back** button in the upper left corner of the app.

You will be prompted for a manager's **Username** and **Password** to proceed.

<< Back

time forge

To exit TimeClock Mode
please have a Manager
enter their username and password.

Username

Password

Clock in, out, and take breaks in TimeClock Mode

While in TimeClock Mode, the Manager App acts like a mobile timeclock, allowing you to clock employees in or out at will. This article will teach you how to locate an employee, clock them in, set them as on/off break, and clock them out.

For the selected location, locate an employee to clock in

1. First, make sure you have the right location selected. To select a different location, use the location selector in the upper right.
2. Once you have the correct location selected, you can either browse the list for an employee (if your list is short) or use the search bar (great for long lists).

💡 If you can't find a particular employee in the list, and you have access to multiple locations, you might have the wrong one selected.

Clock in the employee

Next to the employee's name, tap the action bar where it says **Clock In**.

Select the **department** and **position** for this employee, then tap **Clock In** to complete the process.

Tap **OK** to acknowledge the successful clock-in. You will be returned to the employee list, which should now be updated according to the employee's new status.

Start a Break

Starting a break is simple! Locate a clocked-in employee and tap the action bar next to their name.

The action bar will say "Clock Out," but when the options appear, we'll actually choose **Take a Break**.

Tap **OK** to acknowledge the successful break message. You will be returned to the employee list.

End a Break

To end a break, locate the employee and tap the action bar, which should say "End Break".

Then, tap the **End Break** button.

> 💡 If an employee is on break, they can't be clocked out until their break has first been ended.

Clock out

Clocking out is as easy as ending a break. Find the employee you'd like to clock out and tap the action bar (should say "Clock Out") next to their name:

Then, type in any Shift Notes (optional), and tap the **Clock Out** button to complete the clock-out.

Enable and use Normal Mode

Normal Mode allows employees clock in/out individually using their own credentials. Therefore, in order to use this mode, Manager Mode must be disabled under Settings. This is because Manager Mode allows the ability to clock any employee in/out at will -- which is not necessarily something most businesses want employees to be able to do. To recap:

- Manager Mode - Allows a manager to log in using their own credentials and then clock employees in/out at will from a list of employees.
- Normal Mode - Employees use their own credentials to clock in/out.

Tap the TIMECLOCK tile, then tap Normal Mode

TimeClock Mode, Normal Mode, and TimeClock Settings are all accessible from the TIMECLOCK page in the app. From the home screen, tap TIMECLOCK.

Then, tap the **Normal Mode** button.

Because Normal Mode and Manager Mode are *mutually exclusive settings*, if you have manager functionality enabled, you will be informed that you can't use Normal Mode:

Simply go into the TimeClock Settings first and disable Manager Mode.

While in Normal Mode

Employees will be able to sign in/out using their own credentials. This allows the device to act as a portable timeclock that does not necessarily require manager supervision or require the manager to clock each employee in/out individually.

Adjust the TimeClock settings

The Settings page allows you to manage 3 basic options that control the TimeClock functionality on your device. These include: whether to authenticate users with a username/password or internal number/internal password, what the default location should be in TimeClock mode, and whether to enable or disable Manager Mode.

Tap the TIMECLOCK tile, then tap Settings

TimeClock Settings are accessible from the TIMECLOCK page in the app. From the home screen, tap TIMECLOCK.

Then, tap **Settings**.

The Settings page has 3 options that change how you log in and use the app. These are:

1. **Authenticate with:** Sets whether you log in and control the app with a username and password or with an internal number and internal password.
2. **Default Location:** Sets the default location in the app. The default location is selected when you log into the app.

3. **Manager Mode:** Enables or disables "Manager Mode". With Manager Mode on, only the manager's username and password are needed to perform various functions within the app.

Manager Mode vs Normal Mode

With Manager Mode disabled, you can put the app in Normal Mode and hand your mobile device to your employees, thereby allowing them to individually clock themselves in and out with their own credentials. For this reason, you can't use Normal Mode and Manager Mode at the same time -- these modes are mutually exclusive.

View your Sales and Analytics

Using the TimeForge Manager Mobile app, retailers can view real-time Sales information from anywhere with just a few simple clicks. This guide provides an overview of the sales features and functionality available using the mobile app.

Open the Sales page in the app

Log into the mobile app on your smart phone, then tap the **Sales** tile.

View your Sales data

When you open the **Sales** page, the screen will display current sales totals by department for the selected location.

You can easily switch between sorting by **Department** and by **Amount** using the buttons just below the date.

> 💡 The percentages represent the proportion of sales accounted for by that row: naturally, 100% of Sales are represented in the total, for example, but only 56% percent of Sales are represented by Center Store here.

> ⚠️ The app will always use the location's default Sales Category when displaying Sales information. If no default **Sales Category** is set for the location you are trying to view, the app will prompt you to set one.

Attendance and Scheduled Hours

On the right side of each entry, you'll see your total **Attendance** and actual labor costs. Under that will be your **Scheduled** labor and expected labor costs for comparison.

Manager Projections

If you use **Manager Projections**, you will also see your projected sales.

Ahead or behind the previous day?

Finally, each entry has a red or green bar to the left of it, which indicates whether the figures are ahead or behind the previous week in terms of sales. In the example below, the green bar indicates that the CENTER STORE department is ahead of the previous week's sales.

Select a different location or date (filter your results)

If you would like to view the sales data for a different location or different date, **tap the More button** in the upper right. You will be presented with a list of filters and information.

1. Select the location
2. Select the date
3. Tap **Apply**

View your Sales by Hour

By default, entering the Sales page shows you your sales by department, but you can also see sales broken down by hour.

To view your sales by hour, tap the **arrow** in the upper right hand corner or simply **swipe right** on your screen.

The page will look almost identical, except entries will be by hour instead of department, and there will be an extra line above the list with the **Total Amount** of sales for the day.

ℹ️ If BI Lite syncs item-level Sales data for your account, you can swipe right one more time to view a Sales by Items screen, which will have your Sales figures grouped by item.

Sales Analysis Graphs

To view graphs of your sales, you'll first want to return to the home screen on the app. Just tap the **Back** button in the upper left.

Then, select the **Analysis** tile.

Sales Data

When you tap the Analysis tile, you'll be shown a graph of your **Sales Data**. By default, all departments will be shown, and data will be shown for the current week.

The blue bar shows forecasted sales, the yellow bar shows actual sales, and if you input any manager projections, there will be a red bar showing projected sales. A summary and key is available below the graph to make things easy.

The buttons at the bottom of the screen allow you swap between **Graph** and **List** view. List view simply shows the data in a list format similar to what we saw in the sections above.

Filter by location, department, or dates

Similar to the Sales page, you can select the **Filters** button in the upper right-hand corner to view and change the filters applied to the graph.

In this example, we've selected the NMG Grocery Location #42, All departments, for the week of January 1-7 2019.

If we selected BEER as the department and tapped Apply, we would see:

Labor Distribution Graph

You can view additional graphs, such as Labor Distribution, by **swiping left**.

The Labor Distribution graph will show you real time labor costs. Here we see actual sales (represented by a yellow line) compared to our actual (green line) and scheduled (red line) labor costs.

This graph is purely percentage based, and is comparing your schedule, attendance, and TF Labor Forecast (where applicable) to your sales trends. This is most useful when limited down to departments like Front End, where we should (usually) only have labor where our sales are.

💡 This example uses all departments, but you can select a specific department by following the filter instructions in the previous section.

How to enter manager projections

ℹ️ The following instructions require you to log into the website interface and cannot be performed using the mobile app.

All manager projections must be entered using the online version of TimeForge. To get to the appropriate screen, open the **Sales tab** and select **Manager Projections**.

This screen is where you enter your projected sales. There are several ways to do this:

1. The simplest way is to input projected sales for the entire week and select **Calculate Weekly.** TimeForge will distribute the total based on the previous week's sales trends.
2. The second way is to enter a daily projected sales total into the **TOTAL** column for each day. TimeForge will distribute the amount by daily sales trends for that particular day.
3. You can also enter projections by hour or in even smaller (quarter-hour) increments!

Manager Projections

Enter manager projections to allow for forecasting and budgeting of upcoming sales metrics.

Go to: Daily View | **Hourly View**

⚠ To add new Sales Categories, please go to the corporate level.

Sales Category: SALES ▾   Department: All Departments ▾   Date: 1/1/2019 📅 Show

☑ Include Roll-up department sales?   Copy Previous Date   ◀ December 26 - January 1 ▶

Total weekly sales SALES-All Departments [____] Calculate Weekly ①

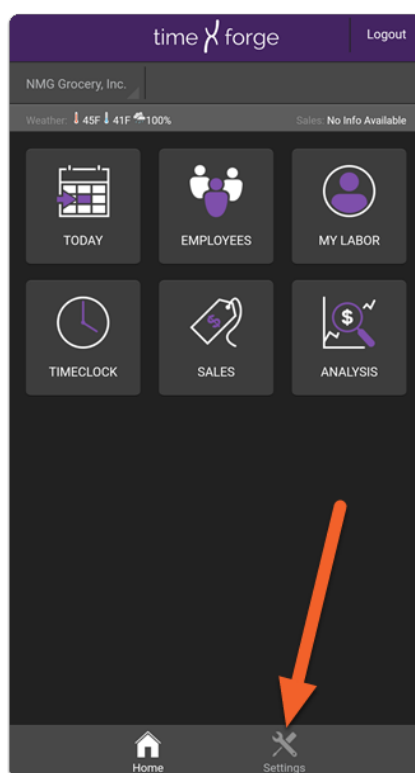|	WED 12/26/2018	THU 12/27/2018	FRI 12/28/2018	SAT 12/29/2018	SUN 12/30/2018	MON 12/31/2018	TUE 01/01/2019	TOTAL
② TOTAL	19,976.47	19,260.69	20,190.13	23,088.35	21,714.63	18,973.84	17,797.48	**141,001.59**
12:00am								0.00
01:00am								0.00
02:00am								0.00
03:00am								0.00
③ 04:00am	7.53	7.53	7.53	7.53	7.53	7.53	7.53	**52.72**
05:00am	7.53	7.53	7.53	7.53	7.53	7.53	7.53	**52.72**
06:00am	7.53	7.53	7.53	7.53	7.53	7.53	7.53	**52.72**
07:00am	513.02	674.71	347.42	458.24	199.25	317.89	410.32	**2,920.85**
08:00am	916.50	852.44	840.36	1,297.41	1,027.19	879.75	559.10	**6,372.75**
09:00am	999.03	690.81	761.45	1,437.64	1,342.24	1,287.75	774.97	**7,293.88**

Adjust the Manager app settings

There are currently two settings available that control overall functionality within the app (separate from TimeClock Settings):

1. **Automatic refresh intervals** (how long, in minutes, the app will wait before refreshing or updating data from TimeForge).
2. **Default location** used throughout the app.

From the home screen, tap the Settings icon at the bottom of the app

The Settings icon is also available in several other areas, but when starting the app, it's easiest to find it right here on the home screen:

You'll be shown the available settings, and the Settings icon will now be highlighted and the Home icon will be dimmed. To get back to the home screen, just tap Home!