Getting Started

timeforge

Smart tools for busy people

Table of Contents

Login and Password Help

Log into TimeForge

TimeForge makes managers' lives easier by providing simple solutions to the difficult aspects of labor management. For employees, this also means painless access to work schedules, time cards, and other great features.

TimeForge is easy to use, and whether you're a manager or an employee, logging into your account only takes a couple clicks!
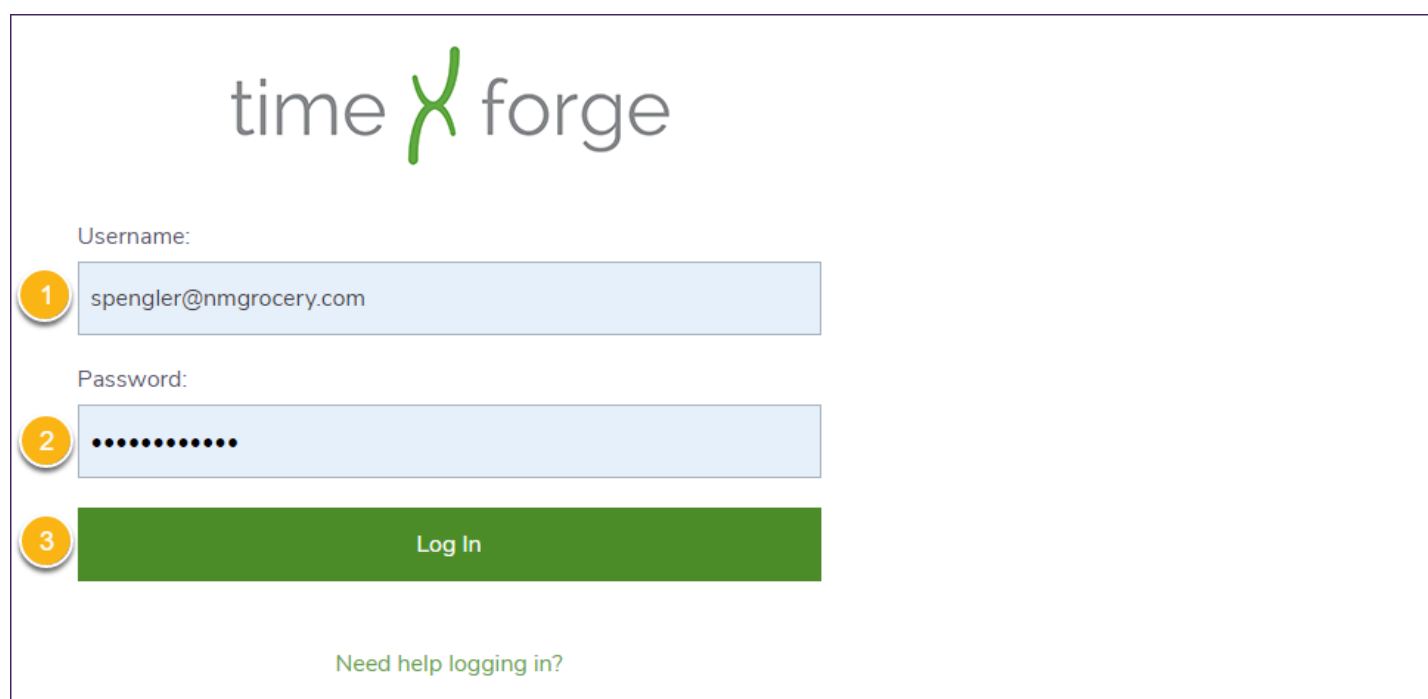
Point your browser to https://timeforge.com

To log in on the web, point your favorite browser to https://timeforge.com.

💡   Bookmark the login page for easy access later!

Enter your username and password, then hit enter

Enter your TimeForge **Username** and **Password**, then either click the Log In button or simply press enter on your keyboard. It's as easy as 1-2-3.

time forge

Username:
1   spengler@nmgrocery.com

Password:
2   ●●●●●●●●●●●

3   Log In

Need help logging in?

Enjoy how easy TimeForge makes labor management!

That's it! You're now in TimeForge. If you're a manager, you can begin creating schedules or tracking attendance, or doing whatever else you need to do to ensure your company operates efficiently.
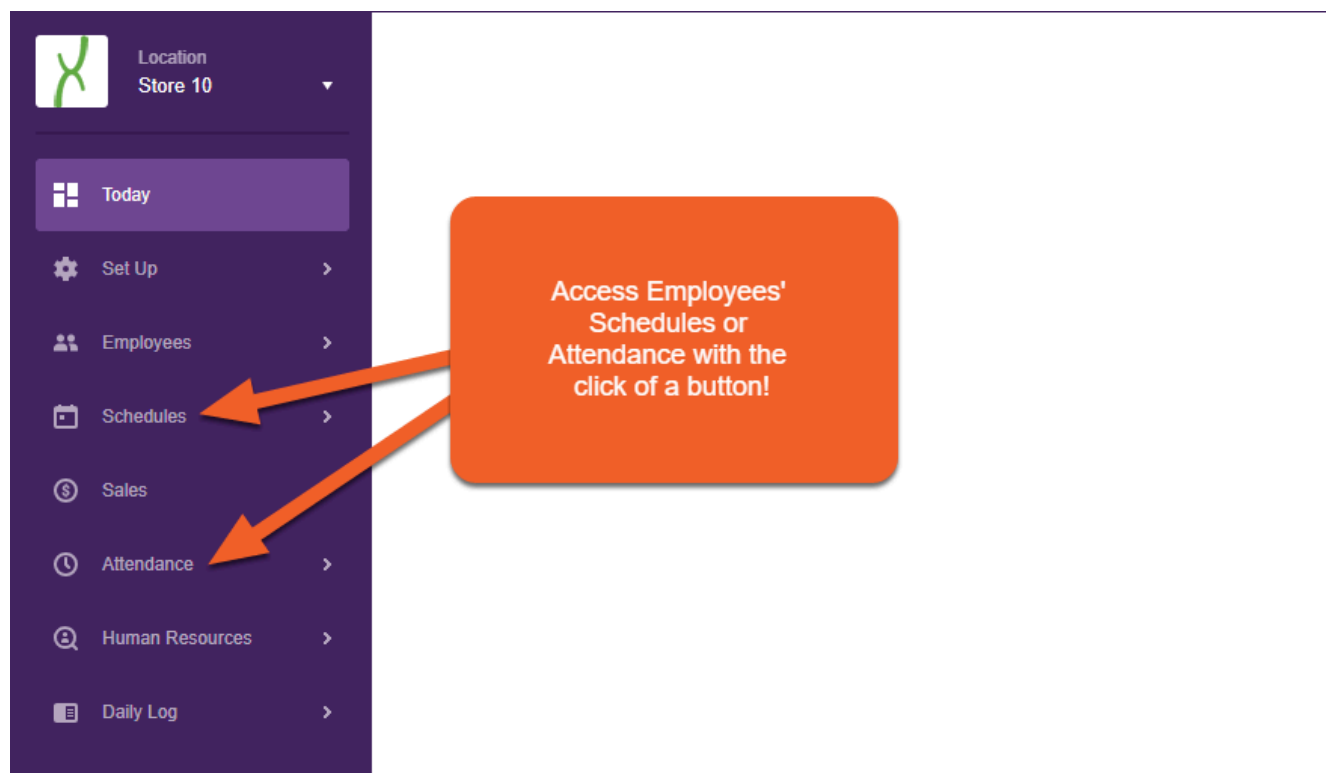

Having trouble logging in?

No problem! If you're an employee, your username is most likely your email address, but your manager may have set you up with a custom username. If you're not sure, check with your manager first.

- If your manager gave you a custom username, they should have also given you a password.
- Otherwise, you should have received an email from TimeForge with a link to set up your password.

If you need help, contact your manager or reach out to our friendly Support Team.
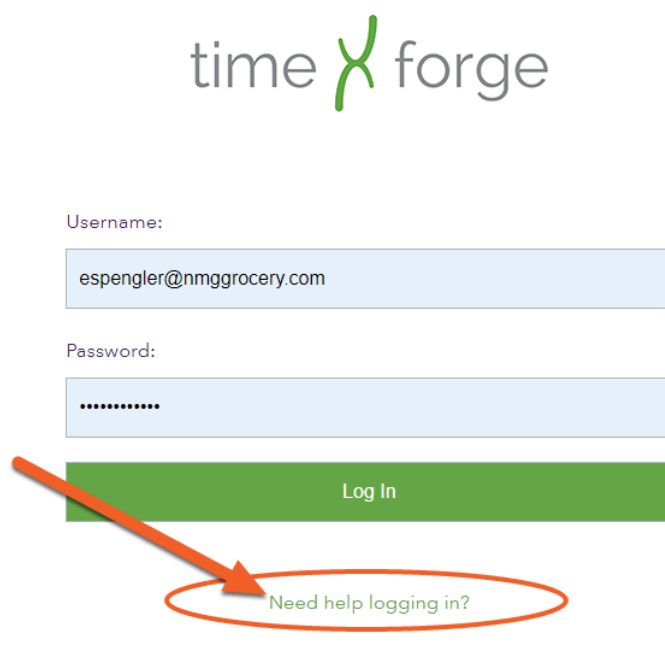
💡 If you've already set up a secret question and answer, you can reset your own password anytime.

Reset your password when you can't log in

TimeForge has a quick and easy password reset utility that allows you to reset your password anytime as long as you have an email address associated with your account. This method replaces the old password reset option that required employees to remember a secret question and answer.

From the login page, click the "Need help logging in?" link

Navigate to the login page, then click the link directly under the Log In button to begin.

Click 'Forgot my password'

No worries, how can we help?

We'll help you log in and get back on track.

Forgot my password

Forgot my username

Back to login

Enter your email or username

No worries, how can we help?

We'll help you log in and get back on track.

Forgot my password

Enter your email or username.

Reset password

Forgot my username

Back to login

Click the 'Reset password' button

No worries, how can we help?
We'll help you log in and get back on track.

Forgot my password

Enter your email or username.

espengler@nmggrocery.com

Reset password

Forgot my username

Back to login

An email with a reset password link will be sent to the email address associated with your TimeForge account. Follow the instructions to reset your password.

Forgot Password

B bounce@timeforge.com
Mon 8/5/2019 4:09 PM

Eric James Spengler,

You have requested to reset your password: Aug 05, 2019

To reset your password, click the following link and follow the instructions.

Reset my password

Cheers,
TimeForge Support
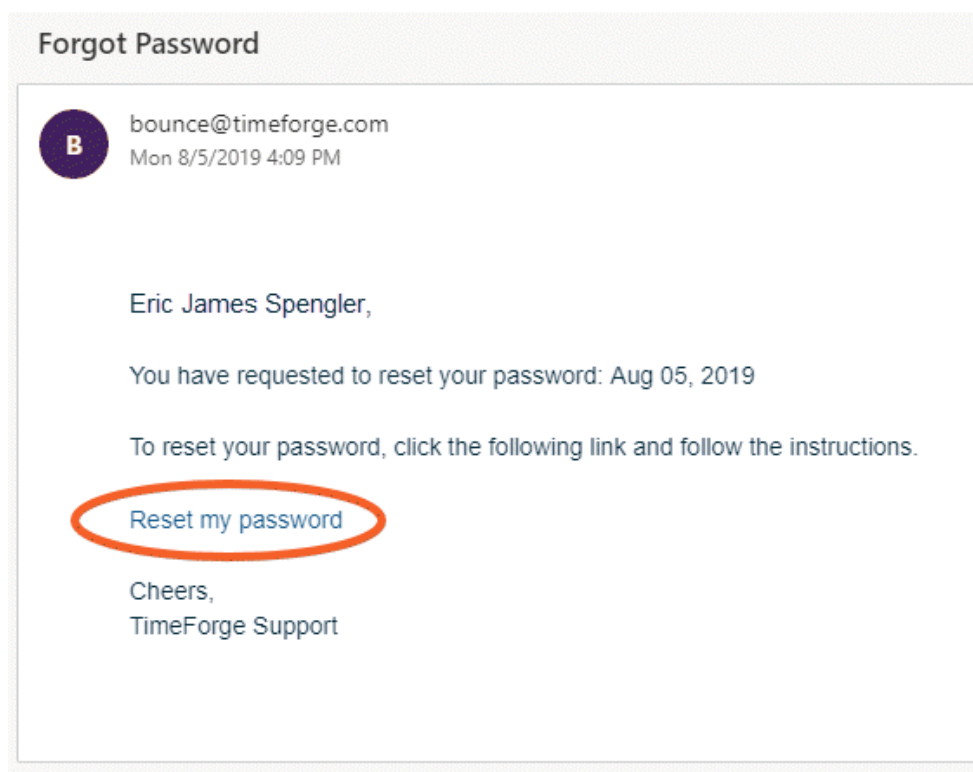
Once you've reset your password, you'll be taken back to the login page. Use your new password to log in!

Reset your password from your profile page

You can reset your password anytime from your **Profile** page in TimeForge. This guide will show you how.

⚠ If you can't log in, you'll need to contact your manager unless you have a [secret question and answer](#) set up. If you have a secret question and answer, you can use TimeForge's built-in [password reset utility](#).

Navigate to your personal profile

While logged in, **click on your name** in the upper right corner of the screen, then select **My Profile.**
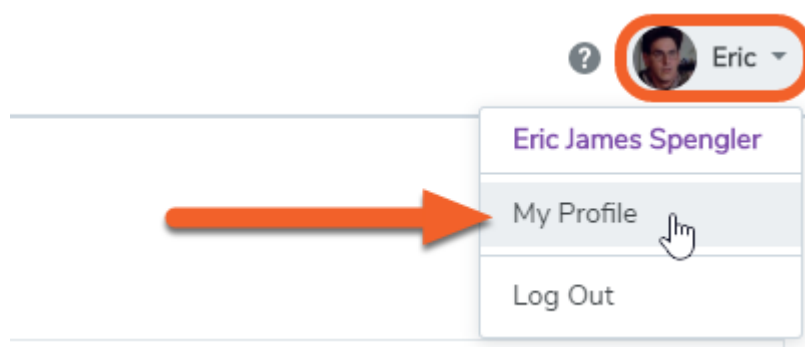
Click the "Change my password" link

You'll find the link near the middle of your profile.

My Profile

Recommend TimeForge to a friend or Access TimeForge on Facebook
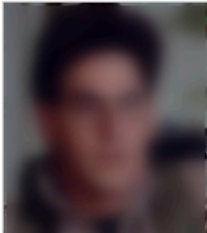
| Personal | Alerts | ICal / RSS | My Scheduled Reports |

My Picture

Upload   Remove

TimeForge Id: 89896890 [?]

My Last Name * Spengler [?]

My First Name * Eric [?]

My Middle Name James [?]

My Email
egon@nmginc.com [?]

My Cell Number
555-555-55 [?] Test Text

Do you want your username to be your email address? No ▼ [?]

My Username *
ericspengler [?]

Change my password

Enter your new password twice

In the text fields that appear, enter and confirm your new password.

💡 Secure passwords are at least 6 characters long and contain both letters and numbers.

My Profile

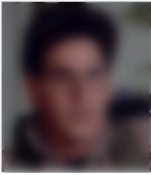Recommend TimeForge to a friend or Access TimeForge on Facebook

| Personal | Alerts | ICal / RSS | My Scheduled Reports |

My Picture

Upload   Remove

TimeForge Id: 89896890 [?]

My Last Name *
Spengler [?]

My First Name *
Eric [?]

My Middle Name
James [?]

My Email
egon@nmginc.com [?]

My Cell Number
555-555-55 [?] Test Text

Do you want your username to be your email address? No ▾ [?]

My Username *
ericspengler [?]

Do not change my password

New Password *
•••••••••••• [?]

Confirm Password *
•••••••••••• [?]

ℹ️ If you change your mind, you can click the "Do not change my password" link just above the text fields.

Click the save button to save your new password

TimeForge Configuration

Display the [Daily View ▾] view by default.

Display times in report [am/pm ▾] format.

What will be the default side navigation view? [Full view ▾]

Would you like to customize your dashboard at each location? [No ▾]

Save My Settings   Cancel

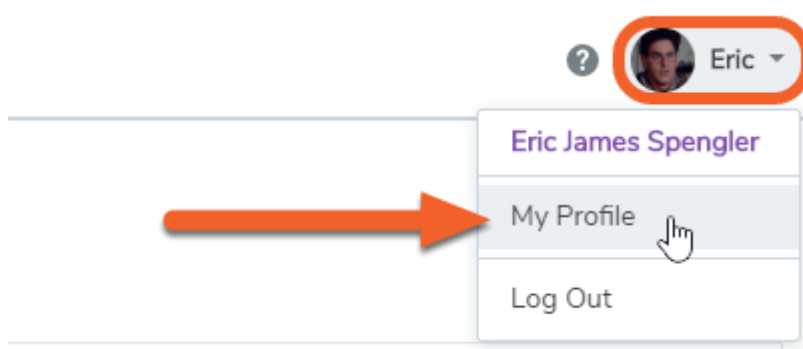The system will inform you if your settings are saved successfully.

💡 Want to make sure you're never locked out due to a lost or forgotten password? Set up your secret question and answer from your profile page, too.

Set up a secret question and answer

A secret question and answer allows you to reset your password anytime, which is super handy if you ever lose or forget it. To set up your secret question and answer, head on over to your **Profile** page in TimeForge.

Navigate to your personal profile

While logged in, **click on your name** in the upper right corner of the screen, then select **My Profile.**
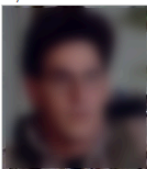
Under Password Recovery, select a secret question

Enter your secret answer

> 💡 Secret answers are **case sensitive**. If you ever need to use it, you'll have to enter it <u>exactly</u> as you type it here.

Click the save button to save your new secret question and answer

The system will inform you if your settings are saved successfully.

Common Tasks

Get started quickly with the Setup Wizard

The TimeForge Setup Wizard makes getting started easy.

The Setup Wizard is a user friendly software guide that helps you quickly set up your location, positions, and employees. Labor scheduling and time attendance have never been simpler!

💡 When you create an account, TimeForge automatically takes you through the wizard, but you can return to it anytime by logging in and following the steps below.

Open the Set Up tab, then select Set Up Wizard

The **Set Up Wizard** can be found under the Set Up tab while at the [Location Level](#).
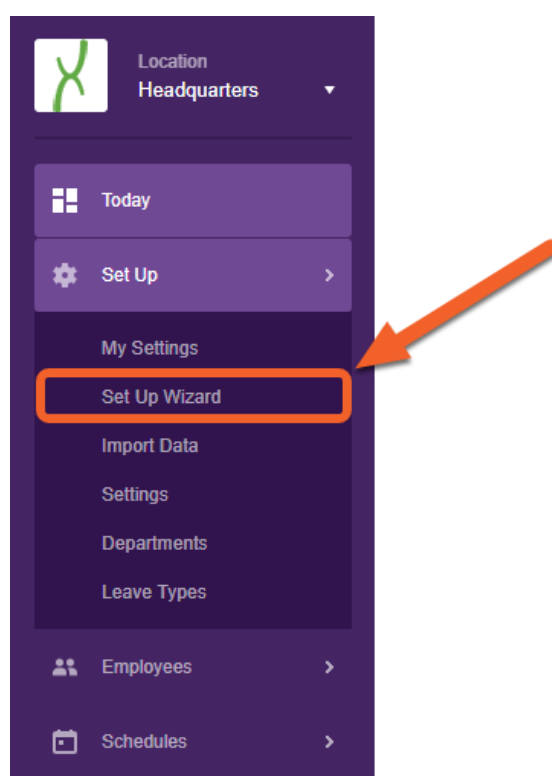
Enter your company and location information

For the first step, enter your basic company and location information, such as the name, address, phone, and fax number for your store. Then, set the day of the week that your schedule starts. If you use bi-weekly or monthly schedules, choose the most appropriate day.

> 💡 Make sure to enter a valid address, as TimeForge will automatically set your time zone based on the location information you enter here.

Click the **Next** button when you're ready to proceed.

Enter your positions and pay rates

For Step 2, enter the positions or job codes that your business uses to schedule employees. Base pay rates and pay scales can also be entered for each Position (don't worry, you can override these rates on a per-employee basis if needed).

Pay rates will be useful later to compute schedule costs and determine sales to labor ratios, and if you're using TimeForge Attendance, they're also used when employees clock in and clock out.

For example:

- A table service restaurant might have positions for: *Waiter, Food Runner, Busser, Bartender, Delivery Driver, Cook, Assistant Manager, Bar Manager, etc.*
- A quick service restaurant might have positions for: *Cashier / Register, Drive Through, Cook, Assistant Manager, Manager, etc.*
- A car wash retail business might have positions for: *Cashier, Attendant, Car Wash Detailer, Team Member, Assistant Manager, Manager, etc.*
- Other retail businesses could have positions for: *Register, Security, Carry Out, Delivery Driver, Bagger, Assistant Manager, Manager, Supervisor, etc.*

If you set a Pay Scale to "Annually" (for example, a salaried manager), the software will automatically compute an equivalent hourly rate in the "Hourly Rate" column. You may override this field if necessary.

Click **Continue - Add Employees** when you're ready to move on.

Create employees and assign them positions

For the last step, enter the employees at your business that will be on the schedule and assign them positions by checking the boxes in the far right column. Each employee will need to have a first and last name in the system, but the middle name or initial is optional.

If you know your employees' email addresses, you can click the **Enter Email** link at the top to enter them in. When you complete the wizard, TimeForge will automatically send those employees an email with instructions to access TimeForge.

> ⚡ Employees can have more than one job code or position assigned to them. To assign multiple job codes, simply check each of the necessary positions for the employee.

Employee Information

Copy and Paste Employees (from Excel)
Enter Email

First Name ?	Middle Name ?	Last Name ?	Employee Positions ?

Employee Positions options:
- ☐ Administrative Assistant
- ☐ EPA Consultant
- ☐ Exterminator Team Lead
- ☐ Field Technician
- ☑ Ghost Grabber
- ☐ HR Director
- ☐ Legal Consultant
- ☐ Office Assistant
- ☐ Paranormal Researcher
- ☐ Senior Ghost Grabber
- ☐ Senior Spectre Exterminator
- ☐ Spectre Exterminator
- ☐ Supernatural Expert

* Louis   * Tully

Employee Positions options:
- ☐ Administrative Assistant
- ☑ EPA Consultant
- ☐ Exterminator Team Lead
- ☐ Field Technician
- ☐ Ghost Grabber
- ☐ HR Director
- ☐ Legal Consultant
- ☐ Office Assistant
- ☐ Paranormal Researcher
- ☐ Senior Ghost Grabber
- ☐ Senior Spectre Exterminator
- ☐ Spectre Exterminator
- ☐ Supernatural Expert

* Walter   * Peck

Employee Positions options:
- ☐ Administrative Assistant
- ☐ EPA Consultant
- ☐ Exterminator Team Lead
- ☐ Field Technician
- ☐ Ghost Grabber
- ☐ HR Director
- ☐ Legal Consultant
- ☐ Office Assistant
- ☐ Paranormal Researcher
- ☐ Senior Ghost Grabber
- ☐ Senior Spectre Exterminator
- ☐ Spectre Exterminator
- ☐ Supernatural Expert

Enter Email

Start Scheduling Now

When you're done entering employees and assigning positions, click the **Start Scheduling Now** to save your changes. That's all there is to it!

Use the Daily Log to stay organized

Keeping track of daily store logs, task lists, to-do items, and sticky notes can be tedious even for a small business. Add to that juggling maintenance visits, training events, human resource tasks, staff meetings, and other necessary items across multiple shifts (where the manager that scheduled the event may not be the manager responsible for the event) and you can quickly have what feels like a second full-time job.

Clear, organized communication among the management team and the rest of the staff is a requirement for every business, in any industry. As your business grows, keeping up with the pile of paperwork will not only become more difficult but also more critical for continued success. Fortunately, the TimeForge **Daily Log** is here to help you keep your business organized! This article will tell you how.

Navigate to your store's Daily Log

1. If your company has more than one location in TimeForge, first make sure you're at the [Location](#) level.
2. Click the **Daily Log tab** to expand the menu.
3. Select **Daily Log** from the list.
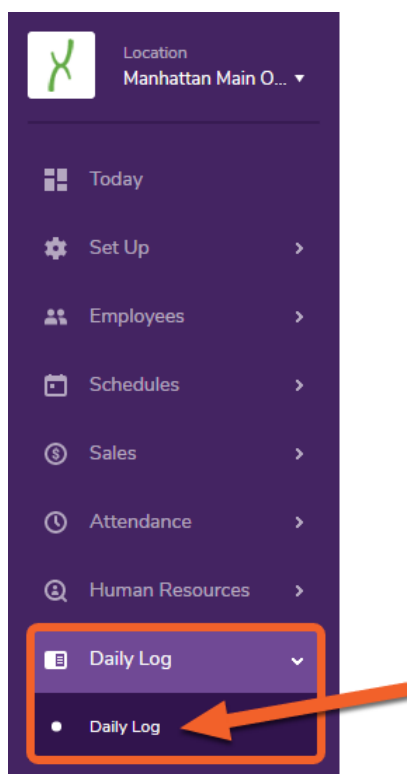
> 💡 If you're the account owner and you haven't set up at least one Daily Log category yet, your logbook will be blank. Simply add your first category to get started ([follow these instructions if you need help](#)), then navigate back to the Daily Log at the Location level to continue following this guide.

Get to know the Daily Log interface

The Daily Log is a powerful yet easy-to-use tool to help keep your business organized. The chart and instructions below will help you get started.

1. Search the Daily Log by keyword, category, the manager who created the log entry, employee, or date range.
2. Logs for the day are displayed in an easy to read format, along with information about the number of hours scheduled for that day, attendance, sales, volume, and whether or not the day is a holiday.
3. Add a new Daily Log entry with a single click! You can add log entries for the current day (always listed at the top) or previous days, as shown here.
4. The date picker allows you to jump to a specific day.
5. Switch between the [three components of the Daily Log](#): the Manager Log (*viewable only by management staff*), the Staff Log (*viewable by all employees*), and the Audit Log (*contains audit information about changes made within TimeForge*).

Need more convincing?

Check out our full list of reasons to use the TimeForge Daily Log. We've laid out all the advantages for you.

Ready to get started?

- Create categories for your Daily Log
- Create your first Daily Log entry
- View past Daily Log entries

Corporate vs. Location Level

TimeForge is a very sophisticated labor management system that works well for both independently owned and operated businesses, as well as chain concepts and franchises with multiple locations. More than just an <u>employee scheduling system</u>, TimeForge has two separate operating levels that can be customized to match your business hierarchy:

- The **Corporate** (or Corporation) level is used to manage settings that affect multiple locations, such as separate retail stores, hotels, or restaurants.
- The **Location** level is used to manage employee schedules and attendance at a specific location.

When operated by a business with more than one location, some of the functionality of TimeForge is moved to the Corporate level to ensure consistent labor reports and pay rules across all business locations.

Corporate level

The Corporate level is used to manage settings that affect multiple business locations, such as company-wide <u>Positions</u>, <u>Departments</u>, and <u>Leave Types</u>.
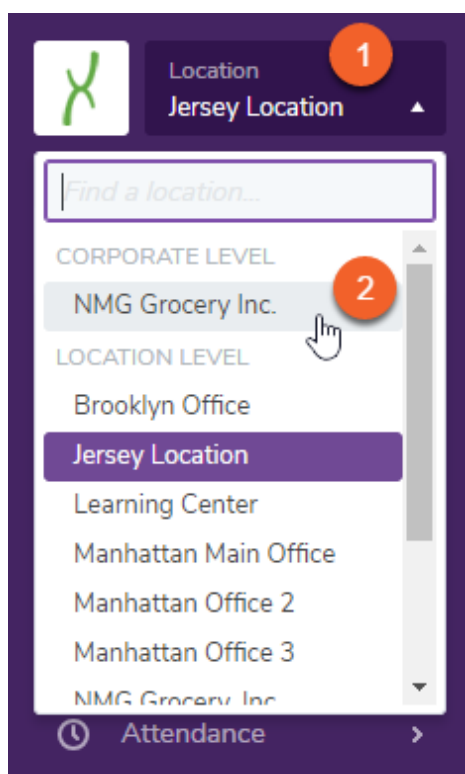
How do I know if I'm at the Corporate Level?

When you have multiple locations (2 or more) in TimeForge and you're at the Corporate level, you will see the word "Corporate" followed by the name of your business:
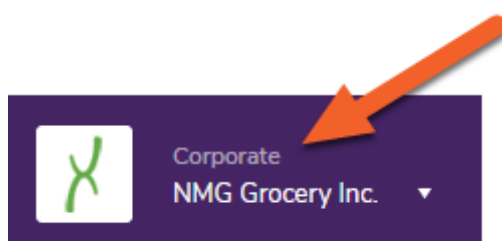
How do I get to the Corporate Level?

Simply click the top of the navigation pane to open up the menu, then select the name of your business under CORPORATE LEVEL.

💡 Adding more locations to TimeForge is easy! Learn how.

Location level

The Location level is used to manage labor at a specific location, including employee schedules and attendance.

## How do I know if I'm at the Location level?

When you're at the Location level and operating with multiple locations inside of TimeForge, you will see the word "Location" followed by the name of your currently-selected location.
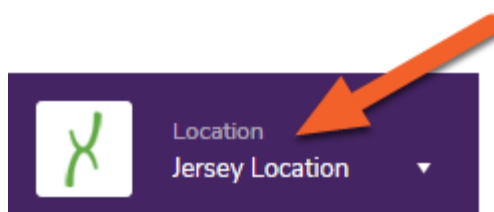
> 💡 Locations in need of manager attention will be displayed with an asterisk next to their name, indicating shift swaps or employee requests that are pending.

How do I get to the Location Level?

Simply click the top of the navigation pane to open up the menu, then select the name of a location under LOCATION LEVEL.
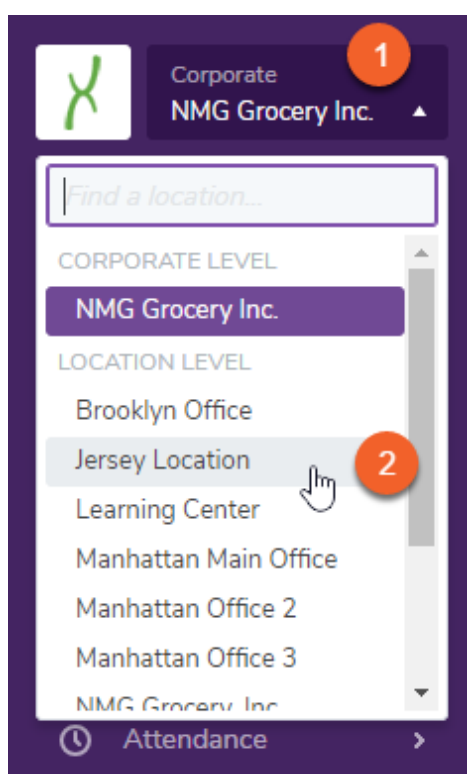
A real-time search box also allows you to quickly search through tens, hundreds, or thousands of store locations by name, store number, address, or zip code:
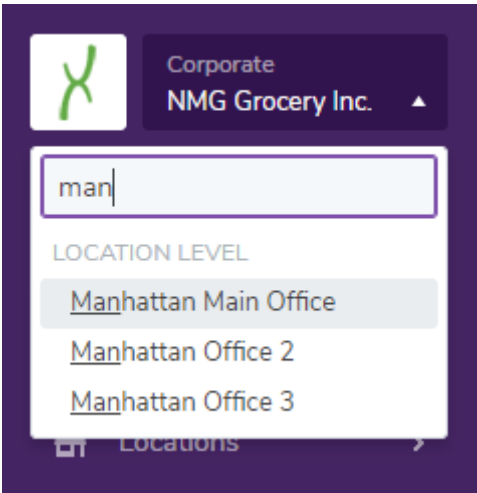
View your list of employees

All staff members are considered employees in TimeForge. Employees are defined across 3 categories (employee, supervisor, or manager) in the TimeForge system. More specifically, if a staff member can log in to TimeForge, can be scheduled inside of TimeForge, or can clock in on TimeForge (or with a 3rd party plug in), then that staff member is considered an "Employee" by TimeForge.

Account owners can add, edit, and terminate employees from the Employee List page.

## Navigate to the Employees page under the Employee tab

If you have multiple locations, first go to the Location level for a particular store, then open the **Employees tab**. Select **Employees** from the sub-menu.
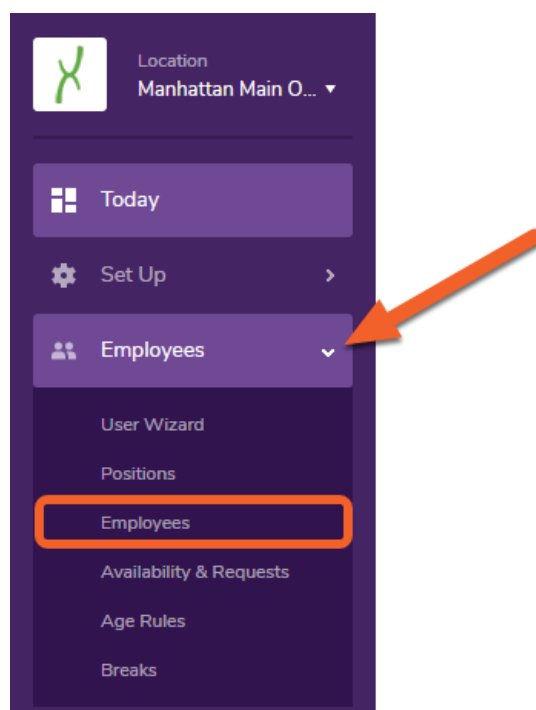
What about from the Corporate level?

You can also view a company-wide employee list from the Corporate level if you have appropriate permissions, but you won't have access to certain features, such as the ability to message all employees or import data.

To view your employees from the Corporate level, open the **Set Up tab**, then select **Employees** from the sub-menu.
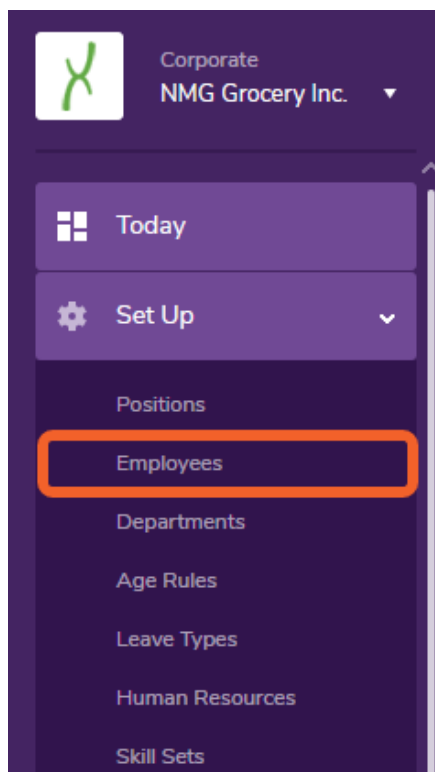
View your list of staff members

From this page, you can view and edit important details, send individual messages, or even message all employees at this location. If you have the appropriate permissions, you can also Terminate employees, as well.

Example List in Grid View

Employees | Review staff members within your organization, including yourself and all management staff.

+ Add Employee | Search | ⊞ ☰

Shift Satisfaction for last 6 weeks | 100 | Message All Employees Import data

Employees [In my departments ▾] Show : [All Positions ▾] [Show] [Show terminated employees]

Employees with departments assigned

Showing 9 of 9 | Sort By [Name ▾]

Donna J Barrett	Eric James Spengler This is you	Janie Melnitz
S Payroll Id 82050 Weekly Hours 10.0 / 40.0	**M** Payroll Id 00001 Weekly Hours 10.0 / 40.0	**E** Payroll Id 63636 Weekly Hours 20.0 / 40.0
Positions Business Analyst	Positions Research and Development Team Lead	Positions Administrative Assistant Customer Support
Hire Date 04/11/2014 Birthday --	Hire Date 03/12/2015 Birthday --	Hire Date 09/05/2005 Birthday --
Message	Message	Message Switch User
Last Edit: Aug 22, 2019 - 2:04 PM Terminate	Last Edit: Sep 19, 2019 - 9:17 AM	Last Edit: Sep 13, 2019 - 3:31 PM Terminate

Example List in List View

Employees | Review staff members within your organization, including yourself and all management staff.

+ Add Employee | Search | ⊞ ☰

Shift Satisfaction for last 6 weeks | 100 | Message All Employees Import data

Employees [In my departments ▾] Show : [All Positions ▾] [Show] [Show terminated employees]

Employees with departments assigned

Showing 1 - 9 of 9 | [100 ▾]

EMPLOYEE TYPE	PICTURE	FIRST NAME	LAST NAME	WEEKLY HOURS	DESIGNATION	DEFAULT POSITION	Fields Reset Export
S		Donna	Barrett	10.0 / 40.0	Full Time	Business Analyst	Edit Terminate Message
M		Eric	Spengler	10.0 / 40.0			Edit Message This is you
E		Janie	Melnitz	20.0 / 40.0	Full Time	Customer Support	Edit Terminate Message Switch User
E		Leonard	Tully	10.0 / 40.0	Full Time	Senior Customer Relations Expert	Edit Terminate Message

💡 Your employees will be shown either in <u>Grid view or List view</u>, depending on your settings. If you're using a new account, you may see Grid view by default. Read our <u>quick guide</u> to learn how to easily swap between the two different views.
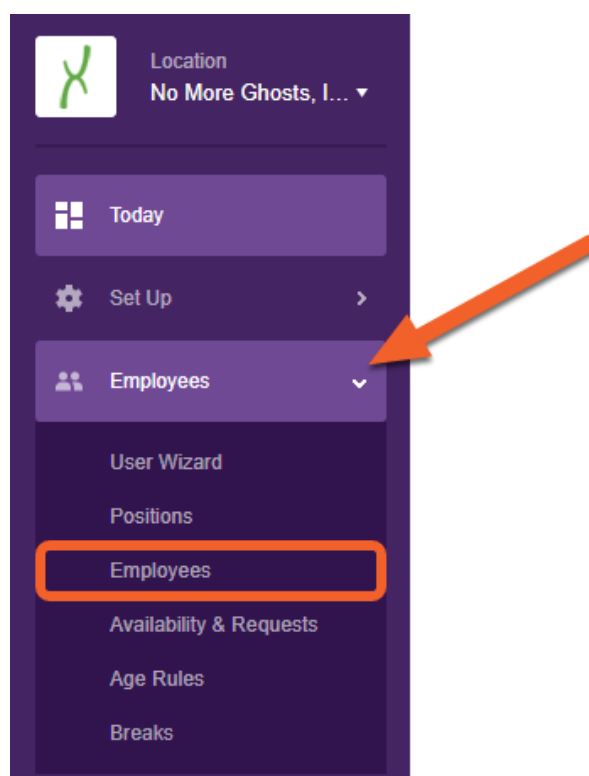
Send a message to all employees at a location

By default, TimeForge allows both Managers and Supervisors to send messages to employees. (Though, this setting can be customized for Supervisors on per-location basis.) This article will teach you how to send a message to all employees at a given location, which can be handy for sending out reminders, announcing upcoming events or requirements, or providing important alerts about the store.

You can also view and send messages at any time by opening the Schedules tab and selecting Messages from the sub-menu.

Navigate to your Employee list

While at the Location level, open the **Employees tab** and select **Employees** from the sub-menu.

Click the "Message All Employees" link in the upper right

Enter your message

Enter your message into the text box. You can also customize the recipient list at this time, if you do not want to send the message to literally all of your staff members. Simply click on one of the available options (e.g. "Send a Message to scheduled staff").

Other options include the ability to attach a document to the message, post the message to the Staff Log, and send the message as a text message to employees who can receive them (requires the message to be 140 characters or less).

Click the Send button to send your message

When you're satisfied with your message, click the **Send a Message** button to send it to your employees!

Send a Message

○ **Send a Message to all staff or only some Position(s) or Employee(s)**

☑ All Staff Members

○ **Send a Message to scheduled staff**
○ **Send a Message to non-scheduled staff**

Message:

Halloween potluck this Friday at 7PM in the lounge! All employees and their families welcome. Costumes encouraged. Bring a dish to share!

Upload Document

☐ Post this Message in the Staff Log

☑ Also send as text message to employees with text messaging capabilities

Send a Message   **Cancel**

You'll then be taken to your Messages page under the Schedules tab, where you can review the message in your Sent Messages list or send another one.

ⓘ Message was sent successfully.

Messages

TimeForge messaging allows you to send and receive messages using our software. All messages are sent as both TimeForge messages (viewable on our website) and email messages to staff members.

Showing messages from: June 20, 2018
Show From: Last month ▼

Send a Message

Incoming Messages

Delete

| From: | To: | Search Text: | Sender: | Anyone | Search |

	Date Sent	Message	From	Viewed	Document
☐	6/20/2018 11:57 AM	Your schedule for the next 3 days is: W... View Message	TimeForge	✔	

Delete

Sent Messages

4 Messages found, displaying all Messages.

Date Sent	Message	Sent Messages	Emailed Messages	Sms Messages	Viewed Messages	Document
7/20/2018 3:18 PM	Halloween potluck this Friday at 7PM in ... View Message	4	4	0	0	
6/21/2018 11:15 AM	Great job with cleanup today, everyone! View Message	4	4	0	0	
6/20/2018 12:15 PM	For No More Ghosts, Inc., a new work sch... View Message	0	0	0	0	
6/20/2018 11:57 AM	For No More Ghosts, Inc., a new work sch... View Message	3	3	0	0	

4 Messages found, displaying all Messages.

Send a Message

Related Topics

- [View your message history and see which employees have read your messages](#)
- [Read and reply to messages](#)
- [Send messages to other employees](#)

Set a user's security level to Employee, Supervisor, or Manager

TimeForge has 3 different security levels that determine what each staff member can do within the TimeForge labor management system.

Manager - A TimeForge Manager is able to do anything inside of the TimeForge system, including adding staff members, adding/editing employee schedules, changing sales forecasts, modifying the daily log, and running payroll reports.

Supervisor - A TimeForge Supervisor is intermediate between a TimeForge Employee and a TimeForge Manager. Using security templates, Supervisor permissions can be customized on a location-by-location basis to best fit your business's needs. By default, supervisors are able to perform every TimeForge function that a TimeForge Manager can. However, Supervisors cannot view the pay rates or salaries of other Supervisors or of any Manager.

Employee - A TimeForge Employee is the base security level for all staff members inside the TimeForge system. Employees can clock in and out and view their time card (if enabled), view their own schedule, request time off, change availability, swap shifts, and set up text messaging and email notifications.

An employee's security level can be changed from his or her employee profile. This article will teach you how.

Navigate to the Employee's profile

Navigate to your employee list and select an employee. This will open up the employee's profile (see example below), which includes information about their positions, departments, demographic characteristics, and more.

Scroll down to the page to the Employee Type section
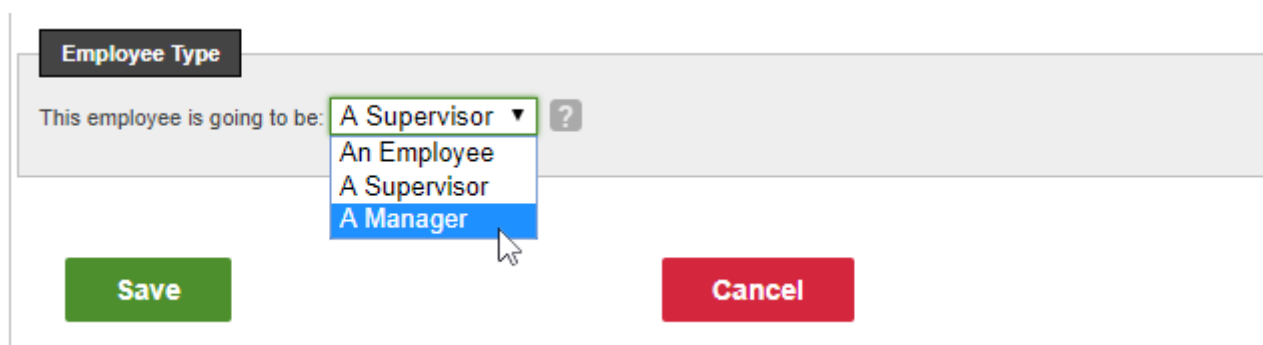
Select a security level from the dropdown list

Click the Save button to save your changes

ℹ If you select "Manager" from the list, you can also choose whether to give the employee access to the Corporate level. Leave the box unchecked to restrict the manager's access to their assigned location.

Related Topics

- Change Supervisors' permissions for a given location
- Create custom security templates
- Apply a custom security template to a specific user

View job positions

TimeForge positions are similar to job descriptions, position codes, or job codes that are available with many Point of Sale systems. In Timeforge, employees can work as many positions as necessary.

Each position can have its own name and description, pay rate (and pay scale), color (for drawing on graphs), and overtime calculation. In addition, positions can have payroll identifiers (for use in some payroll programs), stations or sections (useful when assigning shifts to employees), and multi-level pay rates.

When used at the Corporate level within TimeForge, positions are available at every location. However, each location can have individual base pay rates, multi-level pay rates, sections/stations, overtime calculations, and colors. This functionality enables businesses with multiple locations to easily perform labor management with a single, simple tool -- TimeForge!

This article will teach you how to view and make adjustments to your job positions within TimeForge. We also have a full guide to adding, editing, and deleting positions.

What are stations or sections in TimeForge?

Stations/sections are used to identify areas of work for a specific position or job code. For example, a "Waiter" or "Server" position might have several sections that correspond to tables at a restaurant, such as "Section 1", "Section 2," etc.

What are multi-level pay rates, and what are they used for?

Multi-level Pay Rates can be used to pay staff members at varied rates throughout the work day. For example, a "Waiter" or "Server" position might receive a normal hourly rate of $2.13 from the hours of 10am and 11pm. However, prior to 10am, employees working as a Server may receive $7.35.

Navigate to the Positions page for your location

Open the **Employees tab**, then select **Positions** from the sub-menu.
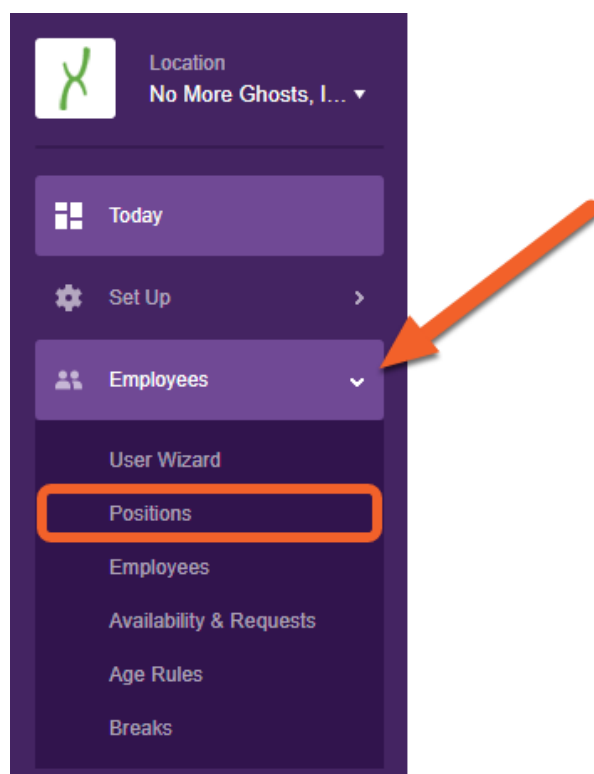
View the list of existing positions

By default, you'll see information about the name of the position, the pay rate and pay scale, overtime calculations (if any), and the color used in charts (if any). Not finding the info you need? Try these steps:

1. Click the List view button to view your positions in a column/table format, as shown here.
2. Click the Fields button to customize which columns are shown.

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

Positions — Positions are used to assign work categories to staff members and work shifts. Common positions might include *server, cashier, manager, etc...*

Search [   ]   ▦ ≣ **1**
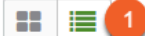
Positions assigned to a department	Showing 1 - 17 of 17	100 ▾

2 Fields | Export

Name ▲	Pay Rate	Pay Scale	Overtime Calculations	Color	
Administrative Assistant	10.00	Hourly	--	🟥	Edit | Message
Business Analyst	16.00	Hourly	--	🟩	Edit | Message
Customer Support	8.50	Hourly	--	🟦	Edit | Message
EPA Consultant	20.00	Hourly	--		Edit | Message
Ghost Grabber	40,000.00	Annually	--		Edit | Message
Ghost Grabbing Team Lead	45,000.00	Annually	--		Edit
Intern	7.50	Hourly	--		Edit
Legal Consultant	5.00	Hourly	--		Edit | Message
Paranormal Investigator	55,000.00	Annually	--		Edit | Message

Review and edit the details for a specific position

Simply click the Edit link to review the details for a specific position. You'll find information under several tabs, including associated Departments, Station/Section information, Multi-Level Pay Rates, and Sales Thresholds.

Position Information: Administrative Assistant

⚠ To change some of the Position Values, please change them at the corporate level.

Position	Departments	Station/Section	Multi-Level Pay Rates	Threshold

Position Information

Position Description *
[Administrative Assistant] [?]

Position Alias
[   ] [?]

Pay Rate * | **Pay Scale** | **Minimum Rate** | **Minimum Wage Before Tips** | **Pay Rule**
[10.00] [?] | [Hourly ▾] [?] | [   ] [?] | [   ] [?] | [1.5x ▾] [?]

Color
🟥 [?]

Payroll ID
[   ] [?]

[**Save**]   [**Cancel**]

If you make any changes to the information in these tabs, don't forget to click the **Save** button!

ℹ️ If you have multiple locations inside TimeForge and some of your positions were created at the Corporate level, you may be asked to go to the Corporate level to make any changes.

💡 Overtime calculations can be based on time and a half (1.5x), double time (2.0x), California Overtime (a combination of 1.5x and 2.0x overtime), or other state-specific formulas.

Related Topics

- [Add, edit, or delete positions](#)

Enable and configure departments

TimeForge Departments provide larger organizations with the ability to assign groups of employees to individual managers.

Each department can have a number of positions, employees, supervisors, and managers. Employees may belong to more than one department, if necessary, and positions can even span multiple departments.

Examples of departments include:

- *Front of house*, *back of house*, and *bar* (restaurants)
- *Cashier*, *meat counter*, *bakery*, etc. (grocery stores)
- *Ticket counter*, *concessions*, and *floor* (movie theater or cinema)

Departments are created at the Corporate Level - all locations (or stores) within a single corporation share departments.

ℹ️ Enabling departments within TimeForge will change the TimeForge interface to accommodate the many new department features.

Navigate to the Departments page

From the Corporate level, expand the **Set Up tab**, then select **Departments** from the sub-menu.
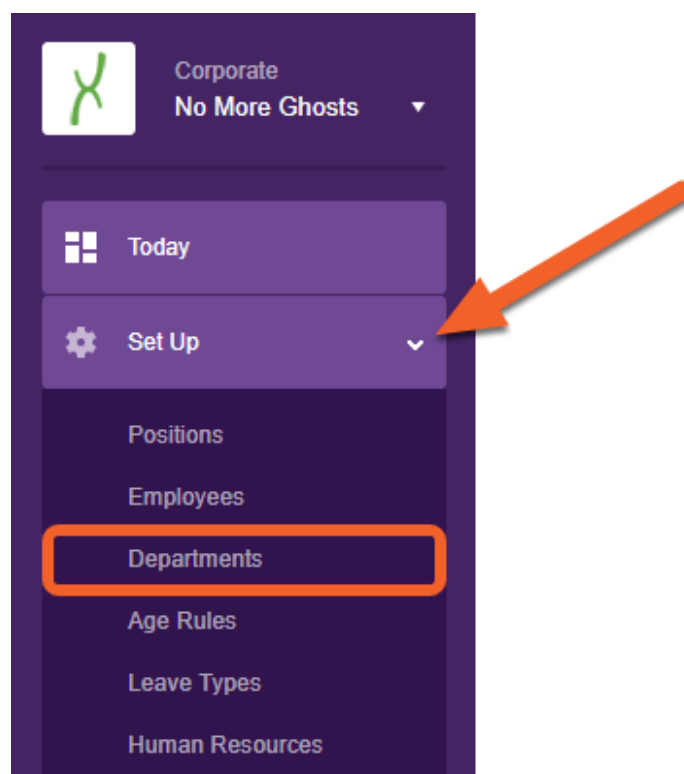
Enable Departments in TimeForge

To enable Departments, click the **Add Department** button.

Read the warning in the pop-up box, and if you're sure you want to enable departments, click the **OK** button to proceed.
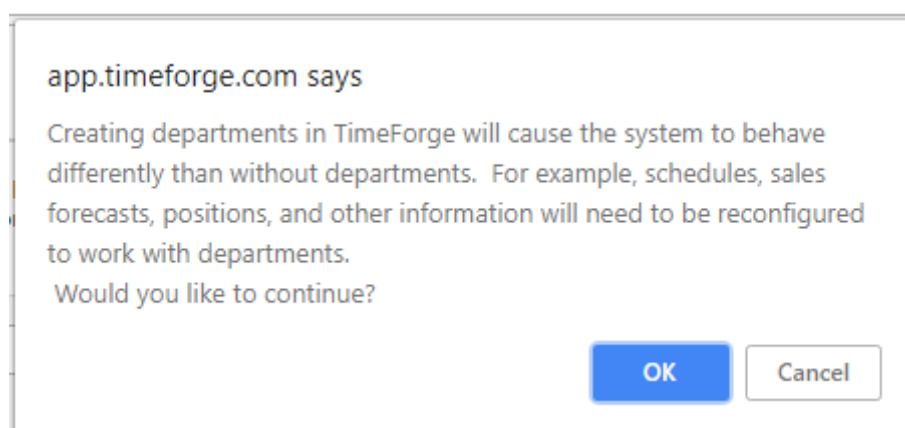
> ♀ Departments, while powerful, should only be enabled by organizations needing them.

Create your new department

Fill out the form. Fields marked with a red asterisk (*) are required.

If you'd like to schedule and track employee hours for this department, be sure to check the appropriate box.

Additional departments can be created the same way. Once you have at least one department, the form for additional departments will include more fields to account for this:

Department Information

All new Departments must be created at the Corporate level.

Assign positions to your new department

Each Department can have one, or more, positions assigned to it. Assigning positions will ensure that staff members, supervisors, and managers are not distracted or confused by other departments that are using TimeForge.

To assign positions to this department, click the Positions tab and check the boxes next to the positions you'd like to associate with this new department.

Department Information: Human Resources

Department	Positions	Employees	SPLH

Department Positions

Select the positions that will be associated with this department.

☑ Administrative Assistant ?   ☐ Business Analyst ?
☐ EPA Consultant ?   ☐ Ghost Grabber ?
☑ HR Director   ☑ HR Manager
☐ Legal Consultant ?   ☐ Paranormal Investigator ?
☐ Project Manager ?   ☐ Senior Ghost Grabber ?
☐ Specter Exterminator ?   ☐ Supernatural Expert ?
☐ Support Supervisor ?

Save   **Cancel**

Assign employees to the department

Assigning Employees to your Department is done exactly like assigning positions to it. Navigate to the employees tab of your Department and click the checkbox for the employee you want to add.

Department Information: Human Resources

Department	Positions	Employees	SPLH

Department Employees

Select the employees will be associated with this department.

☐ Dana Barrett   ☐ Egon Spengler
☑ Janine Melnitz   ☐ Louis Tully
☐ Mayor Lenny   ☐ Peter Venkman
☐ Ray Stanz   ☐ Walter Peck
☐ Winston Zeddemore

Save   **Cancel**

> 💡 Each employee can be assigned to one or more departments. Employees cannot belong to a position unless the position is assigned to one of the employee's departments.

(Optional) Set the department's SPLH rules

The SPLH (Sales Per Labor Hour) tab lets you choose how many labor hours you want to schedule and for what amount of sales. The SPLH grid is mainly used for the ShiftBuilder to calculate how many hours to schedule and is especially handy for retail departments and restaurant staff.

The SPLH tab lets you choose start and end dates, weekly or daily recording, and how many sales you want per labor hour. If you do not need to schedule this department, you can simply leave the SPLH grid blank.

Department Information: Human Resources

| Department | Positions | Employees | **SPLH** |

Department SPLH

Department: Human Resources

Increment	Start Date	End Date	Start Sale	End Sale	Start Hour	End Hour	
Daily ▼							Save

Save   **Cancel**

- **Increment** covers the range (weekly, daily, or hourly) for making calculations based on Sales data.
- **Start date** is the first effective date of the grid, while **End Date** is the last effective date of the grid.
- **Start/End Sales** represent the range for this particular section of the sales curve, in integers. For example, 3000 and 8000.
- **Start/End Hour** represent the bottom range of hours (when your sales equal the start sales) and the top range of hours (when your sales are equal to the end hour).

Be sure to click **Save** when done.

Create schedules on a department basis

You're now ready to start creating schedules for departments! Each schedule can be assigned to a specific department, providing very fast reporting and schedule building on a per-department basis. Additionally, Schedule Templates provide one-click scheduling for each department.

Add or Edit A Schedule

You can select the dates that you wish to schedule here.

Start Date *
08/27/2018

End Date *
08/31/2018

Description *
Customer Service - Schedule from 08/27/2018 to 08/31/201

Department *
Customer Service ▼

Set up schedules for other departments with the above date range.

Set up another department schedule

Add This Schedule   **Cancel**

Import employees from a CSV file

At TimeForge, we understand that many of our customers switch to us from old-fashioned spreadsheets. That's why we offer the ability to import employees directly from a CSV file. Most spreadsheets can easily be saved as a CSV, which makes the transition over to TimeForge smooth and painless.

TimeForge is a complete labor management tool that is great for making things like tracking attendance and creating employee schedules quick and easy. Plus, from the employee profile page, you can keep track of information like cell phone numbers, social security numbers, passwords, payrates, and much more.

You can import employees with just a few clicks! Here's how:

Navigate to your Employees page

Open up the **Set Up tab**, then select **Import Data** from the sub-menu. (The screenshot below shows this at the Corporate level, but you can also do it from the Location level, depending on your needs.)
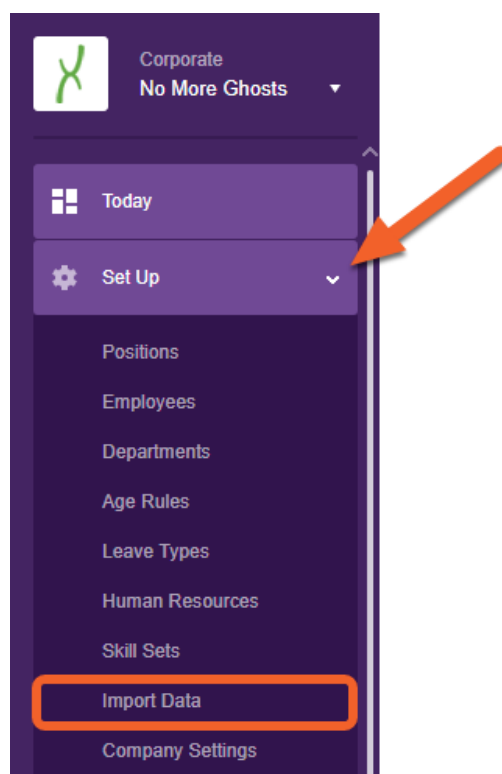
ℹ️ If you can't see the Import Data button while at the Location level, this means you're not using a security template. Applying a security template will allow you to import data from the Location level.

Choose the appropriate CSV file

If your file is currently saved as an .xls or .xlsx, you'll need to first open up Microsoft Excel, then go to **File > Save As** and export it a CSV. You can then select this .csv in TimeForge.

Import Data

You can import your data (positions, employees, departments, pay rates) in a CSV and TimeForge will process it...

Choose a file to upload: | Choose File | No fil...hosen |

Upload Data

Review the employee data for import

TimeForge will automatically attempt to match the header of each column with a field in TimeForge, such as "Employee Name" and "Position," and will show you a preview of the import, starting with the first row in your sheet.

Click the **Next** link to review each subsequent row (employee) in the file.

If satisfied, click the **Import Data** button to import the file. If your first row was a header row, leave the box checked to ignore that row when importing.

⚠️ If you're importing from the Corporate level, your CSV should include a column for **Location Payroll ID**. Otherwise, you will receive an error. At the Location level, the location field is assumed to be the current Location.

Import Data

You can customize the file import by selecting the appropriate fields below. Use the Previous and Next buttons to preview your data.

TimeForge Fields	Imported Data
Employee Name ▼	Sam White
Position Name ▼	Customer Service Manager
Rate for Employee ▼	15.5

Record:
Previous - **Next**

☑ Ignore the first row when importing the data. ❓
☐ Terminate all employees not in the upload file ❓

Import Data　　　**Cancel**

ℹ️ TimeForge **only** looks for matches and updates existing data based on the **Payroll ID** field for that import type. This is true for all types of data, including positions, departments, locations, employees, etc.

💡 If you check the second box, "Terminate all employees not in the upload file," TimeForge will terminate any employee that does not appear in the file you are uploading. This can be helpful if you've already created some employees in TimeForge manually but decided to import the rest -- checking this box will prevent duplicates.

View employee schedules

Accurate and correct employee scheduling is a powerful labor cost control measure. With TimeForge, supervisors and managers can quickly and accurately create employee schedules while considering the needs of their business, as well as the desires of other staff members.

Each TimeForge employee schedule is a collection of many shifts, and each shift is assigned a corresponding start and end time, as well as position (or job), and employee. Other information can be included with each shift, including whether the shift is for an "extra" staff member, the section or station being worked, and other pertinent information.

TimeForge employee schedules can be of any usable business length - some businesses prefer one-week, two-week, or one-month schedules. Other businesses prefer a mix of schedules, and may have differing schedules based on departments or store requirements.

In the event of a scheduling conflict, TimeForge automatically notifies managers and supervisors responsible for creating schedules.

Navigate to the Schedules page

From the Location level, open the **Schedules tab** and select **Schedules** from the sub-menu.
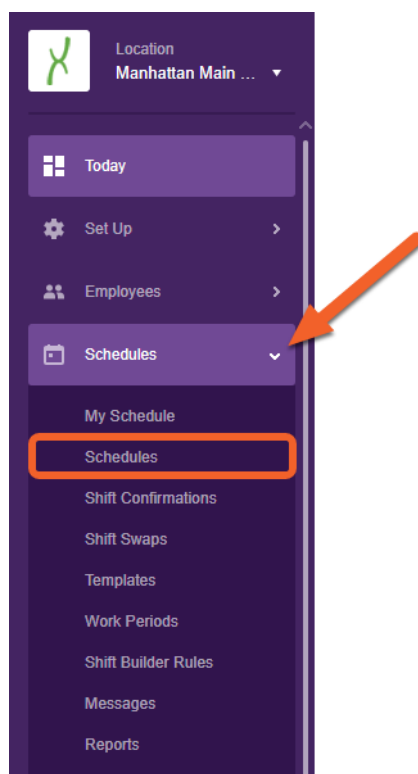
Browse upcoming employee schedules

The Schedules page shows upcoming and past schedules, which can be filtered by department and sorted. Each schedule can be copied, modified, deleted, analyzed, printed, or used to create a template.

Simply click the Edit button to review the schedule's details. In the upper right corner, you can swap from Monthly, Weekly, or Daily View.

Clicking on the name of the schedule, e.g. "Customer Service," will provide you with a list of additional actions:

💡 A summary of information can also be found on the Today Page, such as how many employees are scheduled to work, how many shifts are confirmed, and how many staff members are currently clocked in.

View and edit shifts

In TimeForge, employee schedules are a collection of many shifts, and each shift is assigned a corresponding start and end time, position or job code, and an employee. Other information can be included with each shift, such as whether the shift is for an "extra" staff member, or the name or number of the section or station being worked by the employee (for more info on schedules, see our article on how to View employee schedules).

Shifts can easily be created for a specific day on the schedule or copied to other days on the schedule. Shifts can also be grouped together into days on the schedule, and then can be used to create a template for future schedules. Additionally, shifts can be reassigned to other employees, and are used by the TimeForge ShiftBuilder to estimate anticipated needs for schedules in the future.

Navigate to the Schedules page

From the Location level, open the **Schedules tab** and select **Schedules** from the sub-menu.
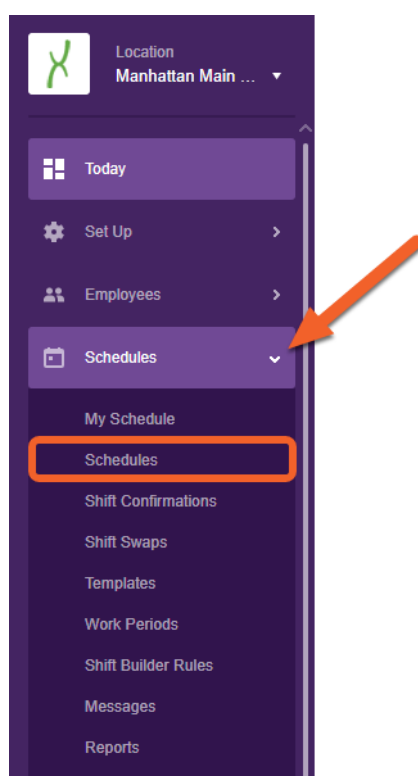
Select a schedule

Click the **Edit** button on an upcoming or past schedule to view its details.

Select a view: Monthly, Weekly, or Daily

By default, TimeForge will show you the Weekly View for that schedule (unless you change your default setting under your profile!), but you can also get a graphical representation of the staffing load for that day by selecting **Daily View** in the upper right corner.

On the left: list of shifts

On the left side of the page will be your list of shifts, with start and end times, employees, and their positions.

On the right: graphic representation

And on the right side will be the corresponding graph.

Edit as necessary - your changes will automatically save in real time!

Your changes will save in real time. To return to the Daily View when you're done, you can click the **Finished!** button at the bottom of the page.

Create schedule templates

To quickly create employee schedules, many TimeForge managers rely on the TimeForge AutoScheduler and schedule forecasts, or if they've got a small crew, they might build schedules manually, one shift at a time. Other managers pre-build days on the schedule using collections of shifts, called templates.

Each TimeForge work schedule template contains one or more shifts, and can be used to quickly generate schedules for staff members. Each location (or store) can have many different schedule templates (as many as are needed), and the schedule templates can be used to build new schedules.

Some examples of employee work schedule templates:

· Friday server / waiter template
· Monday night football template
· Summer weekend lifeguard template
· Christmas retail template

💡   The instructions below will teach you how to make a template from scratch, but you can also turn **any existing schedule** into a template as well, simply by clicking the "Make Template" link on that Schedule!

Navigate to the Templates page

From the Location level, open up the **Schedules tab** and select **Templates** from the list.
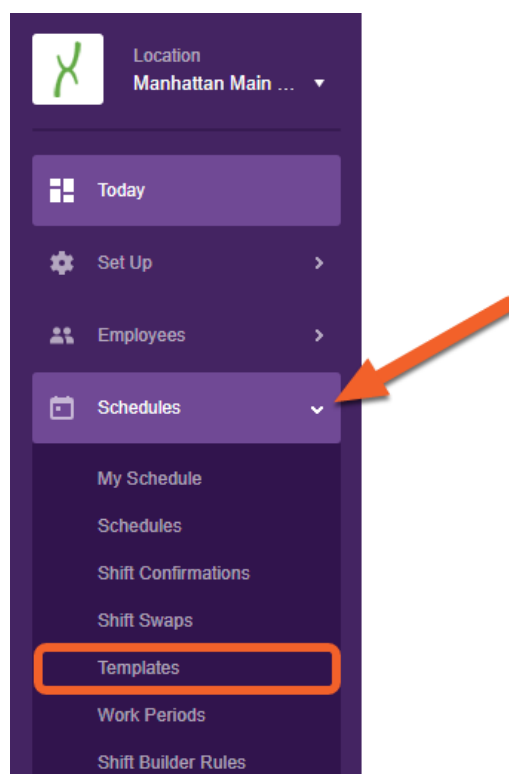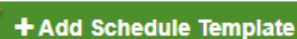
Click the + Add Schedule Template button

Employee schedule templates can be built one shift at a time, or can be copied from other templates. Additionally, a work schedule template can be created from a pre-existing schedule, and if departments are enabled, each department will have individual schedule templates.

There are no limits to the number of schedule templates that can be created at a location.

Schedule Templates | Pre-defined shifts that can be applied to a new schedule. Set up templates for busy staffing days, weekends, rolling schedules, or anything else you'd like.

+ Add Schedule Template

Create a schedule template for any length of time

Work schedule templates can be made for any length of days and for any department.

Fill out the form and click **Save** when done.

Schedule Template Information

Description *
Football Season [?]

Department *
Customer Service ▼ [?]

Starts on
Friday ▼ [?]

Number Of Days
119 [?]

[Save]   [Cancel]

Build your schedule template

Create your work schedule template just as you would build any [employee schedule](#). TimeForge makes it easy by showing you right where to start: STEP 1.

Template
Football Season

ShiftBuilder

Week 1 ▶

| Friday | Saturday | Sunday | Monday | Tuesday | Wednesday | Thursday | ▶ |

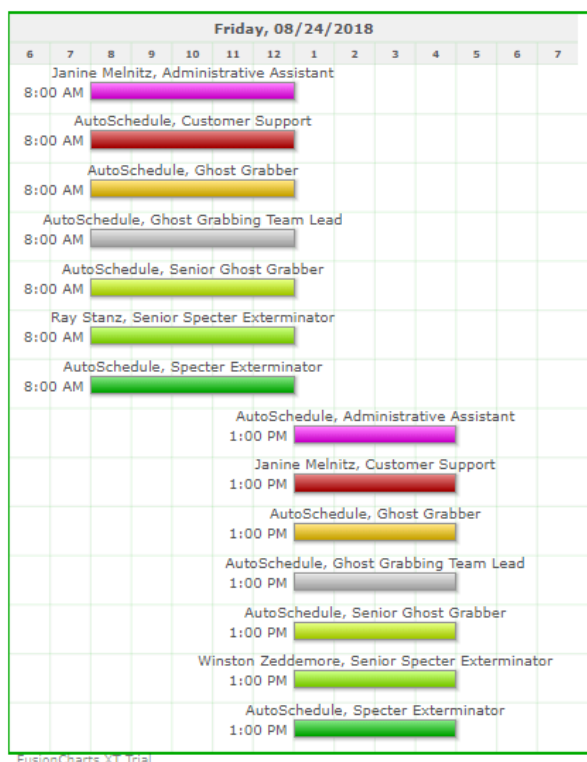**Daily Labor Cost: 120.00**

Filter Shifts

Schedule shifts by
◉ Employee or by ○ Position

Copy Start Time ↕   End Time   Employee   Position

☐ 8:00AM ▼ 4:00PM ▼ Janine Melnitz ▼ Administrative Assistant ▼ 🔒 ✏️📋⛔

[▼] ⇐ STEP 1

	Friday - Week 1												
	6	7	8	9	10	11	12	1	2	3	4	5	6
				Janine Melnitz, Administrative Assistant									
8:00 AM													

FusionCharts XT Trial

Printable view of daily shifts

Display shifts hourly info

[Finished!]

Be sure to click the **Finished!** button when you're done.

Manage employee availability and requests

In many restaurants, retail businesses, and other industries, staff members are required to work with two different concepts for work preferences:

- **Availability** is when <u>employees</u> are normally available to work.
- *For example, an employee may be available on Monday, Wednesday, or Friday from 8am – 2pm. Perhaps that employee is not available to work on Tuesdays or Thursdays because of school conflicts, or another job. Availability is commonly updated on a continuous basis (school semesters are common), and are filled out by staff members.*
- **Requests** are normally one-time changes to your employees' normal availability.
- *For example, an employee may be available next Tuesday to work because their professor canceled class. In many businesses, requests are placed in some sort of log book – either an industry specific manager log (such as a Red Book from Red Book Solutions or a Beat Yesterday book) or a simple spiral notebook or binder.*

TimeForge supports both types of work preferences from a single Availability & Requests page. <u>Recurring requests can be be made within TimeForge</u>, similar to an Availability sheet, and individual daily Requests can also be made within TimeForge.

Navigate to the Availability and Requests page

From the <u>Location level</u>, open the **Employees tab**, then select **Availability & Requests** from the sub-menu.
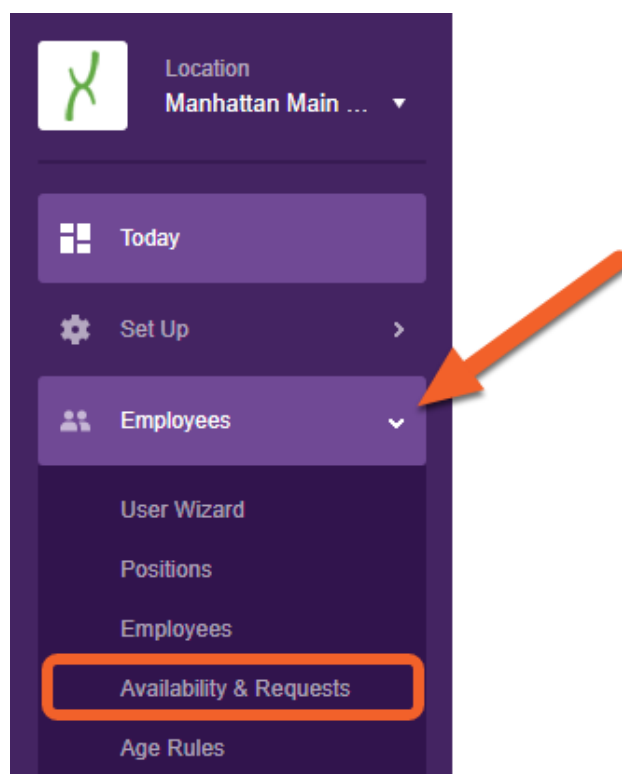
The Availability and Requests page

Overview

TimeForge supports 4 different types of Availability and Requests to enable staff members to easily customize their work schedule. These are color-coded in TimeForge to make them easier to identify visually:

1. **Wants to work (green)**- If an employee would like to work a particular shift, for example on a day that works well with their schedule, they should create a **Wants to work** request.
2. **Available to work** (gray) - By default, employees are always available to work, and can be scheduled to work. They should create either **Wants to work**, **Does not want to work**, or **Unavailable to work** requests to change their availability.
3. **Does not want to work** (yellow) - These requests indicate that the employee would prefer to not work, but can work if required.
4. **Unavailable to work** (red) - If an employee cannot work, an **Unavailable to work** request will ensure that they are not placed on the schedule during this time frame.

Staff requests and changes to availability are sent to the management team for approval, and once approved the employee will be notified through TimeForge and by email (if an email account is set up).

Submitting, Editing, and Preventing/Enabling Requests

Edit A Request

Track requests for time off, staff availability, and also create PTO requests for each of your team members.

1. Use the dropdown menu to select a different employee or the date picker to select a different date.
2. Click the date at the top of the column to create a new request for that day.
3. Click the "Edit" link to edit an existing request.
4. Click the "Do Not Allow Requests" link to prevent requests for that date (the column will then appear in dark gray) or re-enable requests by clicking the "Allow Requests" link.
5. Use the **Previous** and **Next** buttons to cycle between weeks.

Grid View vs. List View

TimeForge gives you the ability to choose how you want to see employees, schedules, locations, departments, and other lists by switching between a grid with cards and a more traditional table list. Each card in the grid view gives you a focused snapshot of an individual item on your list, while the list view gives you a detailed, customizable list that makes it easier to see everything at once.

This guide will teach you how to easily toggle between the two views, how to filter your lists to see only what you want to see, and how to export your filtered lists for your records.

Grid View

For new accounts, TimeForge uses the Grid View by default. This view groups your data into simple cards. These cards make it easy to focus on the information you need by providing an overview of each item in the list. Because it's more graphically-oriented, this view is great for small businesses, smaller stores, and new accounts.

Example Employee Roster displayed in Grid View

How do I edit the information in Grid View?

Simply click anywhere on a card!

List View

More compact than the Grid View, the List View operates like a traditional list with some nifty upgrades. In this view, you can customize which fields or columns are displayed, as well as export your data, making it a cinch to create your own reports and records.

Example Employee Roster in List View

How do I customize my list?

First, make sure you are using the List View. Then, click the **Fields** button to the upper right of your list.

Employees with departments assigned

Showing 1 - 9 of 9 | 100 ▼

Employee Type	Picture ▲	First Name	Last Name	Email	Phone	Payroll ID	Weekly Hours	Employee Positions	
S		Dana	Barrett	dana@nomoreghosts.com	555-555-5500	82050	10.0 / 40.0	Business Analyst	Edit Terminate Message
M		Egon	Spengler	egon@nomoreghosts.com		00001	10.0 / 40.0	Paranormal Investigator Paranormal Researcher	Edit Message This is you
E		Janine	Melnitz	jmelnitz@nomoreghosts.com		63636	20.0 / 40.0	Administrative Assistant Customer Support	Edit Terminate Message Switch User
E		Louis	Tully	ltully@nomoreghosts.com		28502	10.0 / 40.0	Ghost Grabber	Edit Terminate Message

Select the fields you want to add. Selected fields appear beveled, like toggled buttons (e.g. First Name, Last Name below). There are lots of options, so be sure to scroll down to view them all!

When you're done, simply click anywhere else in the window to return to your list and view your changes.

In the example below, we've disabled some default fields and added whether or not the employee is clocked in and what their default position is:

Employee Type	Picture	First Name ▲	Last Name	Currently Clocked In	Default Position	Fields	Reset	Export
S		Dana	Barrett	Yes	Business Analyst		Edit	Terminate
M		Egon	Spengler	No			Edit	This is you
E		Janine	Melnitz	No	Customer Support		Edit	Terminate
E		Louis	Tully	Yes	Ghost Grabber		Edit	Terminate

⚠ **Having too many columns in your list can be cumbersome and make your list difficult to read. Your list may not display correctly and may not export as intended. It's best to keep your list to a manageable number of columns (less than 10).**

How do I export my list?

First, follow the steps above to customize your list and get it just the way you want it. Then, select the **Export** button.

Employee Type	Picture	First Name ▲	Last Name	Currently Clocked In	Default Position	Fields	Reset	Export
S		Dana	Barrett	Yes	Business Analyst		Edit	Terminate
M		Egon	Spengler	No			Edit	This is you
E		Janine	Melnitz	No	Customer Support		Edit	Terminate
E		Louis	Tully	Yes	Ghost Grabber		Edit	Terminate

Next, select a file format. You can export your list as an Excel spreadsheet, a CSV file, or PDF.

Fields	Reset	Export

> Excel
>
> CSV
>
> PDF
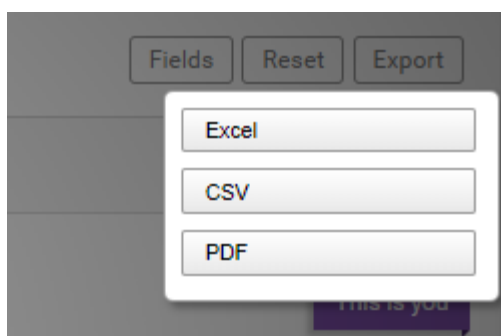
Once you make a selection, the file will save to your computer. You can then print it, email it, analyze it -- whatever you want to do!

Switching between Grid View and List View

Switching between views is incredibly easy! In the upper right corner, you'll see a toggle button. Simply click the left side to view your information as a grid, or click the right side to view your information as a list.

You can swap back and forth to see what you like best. Your settings are unique to your account, and each area of TimeForge (your employee roster, your list of locations, etc.) will remember whether you prefer to see that set of information as a grid or list.

Troubleshooting & FAQs

Common Questions about TimeForge

Below is a list of frequently asked questions (FAQ) and short answers. Can't find what you're looking for? Our friendly Support Team is here to help.

Users & Locations

How many employees can I add to my TimeForge account?

If you're on the **Scheduling Lite** plan, you can add up to 10 employees.

Otherwise, you can add as many employees as you like!

How many locations can I add to my TimeForge account?

As many as you'd like!

I have a lot of employees, but most of them don't work every week. Will I be billed for all of them?

TimeForge bills proactively, in 30-day billing cycles, based on the number of employees in your account at the time you're billed.

This means that if you signed up for TimeForge Scheduling on January 1, and you have 10 active employees, you'll be billed for all 10. If, on February 1, you have 12 active employees, you'll be billed for 12.

Some TimeForge customers that have seasonal businesses will terminate (in TimeForge) the employees who don't work during certain seasons. During those months, they will only be billed for the employees who are active/not terminated. Then, when the busy season arrives, they re-instate the terminated employees and are billed for those employees again.

What counts as a user in TimeForge?

Employees, supervisors, and managers are all considered users in TimeForge.

In TimeForge, there are three "employee types" to choose from: employee, supervisor, and manager. All three are considered users. Active users are employees, supervisors, and managers in your

TimeForge account that have not been terminated. TimeForge bills based on the number of active users in your account at the beginning of your payment cycle.

Will TimeForge help my employees if they have trouble logging in?

Absolutely! Customer Support is our number one priority.

Anyone who is having trouble logging in can call us at 866-684-7191 or send us an email. We're here to help!

Will I still receive alerts if I log in with a username instead of an email address?

Absolutely! If you have an email address in TimeForge, you will receive email alerts, even if you log in with a username instead of an email address.

If you have an email address in TimeForge, and you set your account to receive certain alerts, you will receive the alerts both as emails and as TimeForge messages. If you do not have an email address anywhere in TimeForge, you will still receive alerts, but as TimeForge messages only.

Can my employees share an email address in TimeForge?

Because each email address is uniquely tied to an account in TimeForge, each employee must have their own unique email address. An email address cannot be used more than once in TimeForge.

Software & Integrations

Does TimeForge have an API or a web service?

Sure does! TimeForge can integrate with several systems to pull attendance, sales, employee, and other data into TimeForge and then push schedules to the POS. TimeForge can also be used with TimeClock hardware, which is controlled by web services.

Do I have to download anything to use TimeForge?

Nope! TimeForge is a web-based application that exists "in the cloud." This means you only need internet access and a web browser in order to use it.

Unless you are integrating TimeForge with another program, you will never have to install or download software. You will be able to access the features of your account and retrieve your data securely from the internet--anywhere, any time. See our security FAQ to learn more about how your data is stored.

Scheduling

Can TimeForge handle shifts that extend past midnight?

Definitely! TimeForge is great at handling shifts where employees work through midnight.

If an employee works past midnight, TimeForge can simply record the attendance on the day the shift started. Or, you can choose to have the attendance split at midnight, so that anything after midnight appears on the next day's attendance.

Is TimeForge designed to schedule appointments?

TimeForge is designed to schedule employees, not to schedule appointments.

Although TimeForge is not an appointment scheduling software, the TimeForge Events feature may accommodate your needs.

Sales

What is the difference between actual and forecasted sales?

Actual Figures are your real-life sales numbers that are either imported from a CSV file or are pulled from your POS system.

System Forecasts are generated by an algorithm that looks at historic sales data in your account and makes educated guesses about what your upcoming sales numbers might be.

Features & Payment Options

Why am I stuck on a Payment Options page when I log in?

Your free trial has expired.

Once your free trial expires, TimeForge requires payment to continue using the service. The Payment Options screen allows you to choose which features you want, then enter in your payment information through our secure portal. Once that's done, you can access any page in TimeForge and all the data from your free trial, for as long as you subscribe.

Why am I being prompted for payment information for Scheduling

Lite?

Our [Terms of Service](#) state that we require a valid credit card for all TimeForge accounts, whether they're paying accounts or free accounts. As long as you have fewer than 10 employees, we'll never charge you for Scheduling Lite.

How do I get additional features turned on for my account?

TimeForge is highly customizable and can be configured to suit your needs. For example, you may want to start with the basics, then add features individually as you see fit or as your business grows.

To add additional features to your account, call us at 866-684-7191. We'll be happy to help!

How do I request new features or reports?

TimeForge grows and evolves based on customer feedback.

We're always looking for ways to improve TimeForge. If you ever think of something that could really benefit your business (that TimeForge doesn't already offer), just let us know. You can put in a request with our [Support Team](#) or give us a call at 866-684-7191. We'd love to hear your ideas!

Accounts & Access

How do I request a demo of TimeForge? Can I try it out, first?

At TimeForge, we truly value our customers, and we make it our goal to show them how our software can help them save time and money.

Often, our customers request a demo of TimeForge, or a walk through of some features and modules that they want to customize for their business. During these demos, customers can see our screen, and we'll also be connected in a conference call so that we can explain how TimeForge's features work and how their business can take advantage of the software.

To set up a demo of TimeForge, all you have to do is [contact us](#). We're happy to schedule a demo for a time that works best for you.

And if you don't have TimeForge yet, you can always start your [free trial](#) from our website!

How do I access my data after I cancel my TimeForge account?

Once you cancel your TimeForge account, you can no longer access your TimeForge data.

When you [cancel your TimeForge account](#), it is assumed that you no longer need access to the information stored in the account. However, TimeForge features many handy reports that allow you to track all of the important information in your account, so just make sure you run any necessary reports *before* you cancel your account, and save those files to your computer.

Is TimeForge available to businesses outside the USA?

Absolutely! TimeForge has customers in several countries.

TimeForge is a powerful labor management tool with the ability to internationalize. Currently, TimeForge is being used in multiple countries, such as Australia, India, Canada, and Germany. TimeForge values its customers and works hard to accommodate everyone, no matter where they're based.

What kinds of security features does TimeForge offer?

Tons! TimeForge is incredibly secure!

We're living in the information age, which means it's becoming more and more necessary to use the internet to store and track important information. TimeForge is aware of the risks you're taking by storing your information in an online database and has made the system incredibly secure so that you can rest easy.

Read on to learn more about TimeForge's security features.

Database and Data Centers

- The TimeForge data center is in Dallas, TX, with backups all over the world.
- The data center provides driver's license verification, photo ID checks, 24/7 video surveillance, a man trap when entering and exiting the building, and is SOC-1 compliant.
- Database backups and key infrastructure software pieces are stored in offsite data centers.
- The database is backed up every day and those backups are stored for 45 days at a time in both data centers.
- There is no limit on data storage.
- All personally identifiable information (PII) data are stored encrypted.
- Access to the database is only available to key personnel, and all access is logged.
- The network infrastructure has four backups and three generators.

Software Security

- TimeForge software is protected by multiple firewalls, including software and hardware firewalls.
- TimeForge uses website monitoring systems to protect against malware, blacklisting, server scanning, and viruses.
- All changes to the software are stored in a "change log".
- Every connection to or from TimeForge is SSL encrypted or protected using TLS 1.2.

Customer Protection

- Security within an account can be set up for different users and/or roles, restricting access to features like unassigned locations, pay rates, etc.
- In order to reset a password or give someone access to an account, TimeForge requires identification information to be verified.

- Customers can view information about changes made in their account in the Audit Log feature of TimeForge Daily Log.
- No customer data is ever shared without your permission.
- TimeForge data is retained indefinitely - your important information won't be deleted!
- The TimeForge web software doesn't require any installation.
- Upgrades happen late at night or early in the morning, and the downtime usually lasts about 1 minute, if at all.

TimeForge understands how scary it can be to put all of your important personal and business information into a system without being sure who will be able to view it, or how safe it may be from viruses or deletion. Don't worry - your data are safe with us!

Why can't my employees clock out for a break?

Either you do not have breaks turned on in TimeForge, or the employees are not meeting the criteria specified in your break rules.

For instance, if your break rules state that employees aren't allowed to take a break unless they've been at work for two hours, they won't be given the option to take a break in TimeForge until they've been clocked in for two hours.

What are shift satisfactions?

Shift satisfactions are "thumbs up" and "thumbs down" rankings for shifts! To track shift satisfactions in TimeForge, you'll first need to enable the rate/rank feature.

Enable the "rate/rank" feature to track shift satisfactions.

From the Location level, open the **Set Up tab** and select **Settings**.
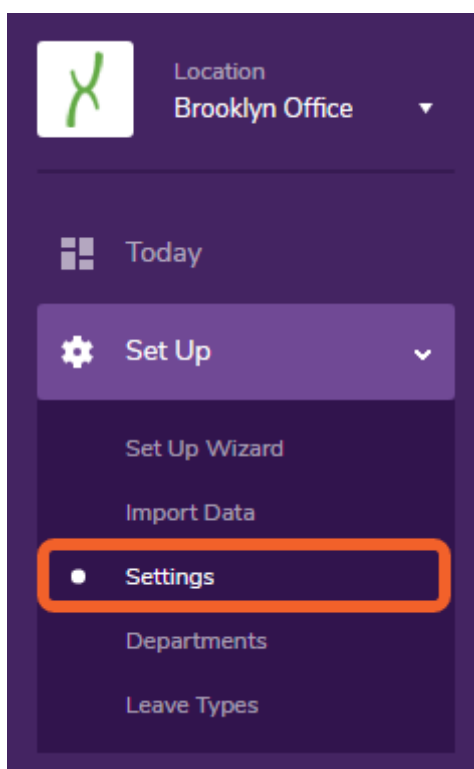
Scroll down to the option that reads 'Do you want to enable staff members to rate/rank their shifts?'

Do you want to enable employees to request time off and change their availability? Yes ▼ ?

Do you want to enable employees to use shift swapping? Yes ▼ ?

Do you want to enable staff members to rate/rank their shifts? No ▼ ?

Do you want to enable staff members to confirm their scheduled shifts? Yes ▼ ?

Shifts must be confirmed on the day of the shift? No ▼ ?

Do you want to enable staff members to confirm the shift multiple times? No ▼ ?

Select Yes, then scroll down and Save your changes

Do you want to enable staff members to rate/rank their shifts? Yes ▼ ?

Type here to search

Supervisor Reports: Clear List

---All Attendance Reports---
- Attendance Breaks by Employee
- Attendance Breaks by Position
- Attendance Report
- Attendance Report with Costs
- Attendance Summary Report with Costs
- Attendance Summary Report, sorted by Position, with Costs
- Badge Report CR80

List of reports to be able to run by supervisors

Save   Cancel

Let your employees know they can now rate/rank their shifts!

If this feature is enabled, after employees have worked a shift, a **Rate** link will appear on the shift on their Today page calendar / monthly schedule.
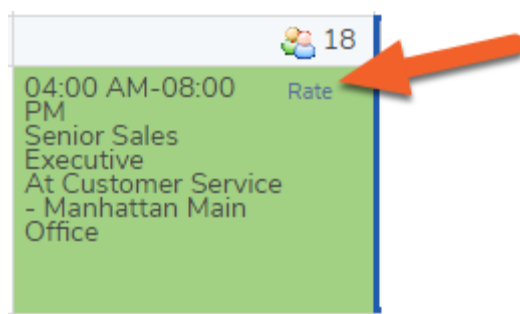
The rankings are "thumbs up" and "thumbs down"

Employees can click the appropriate icon, depending on how the shift went. This allows management to view trends in shift satisfaction, to identify potential problems, or give due praise!
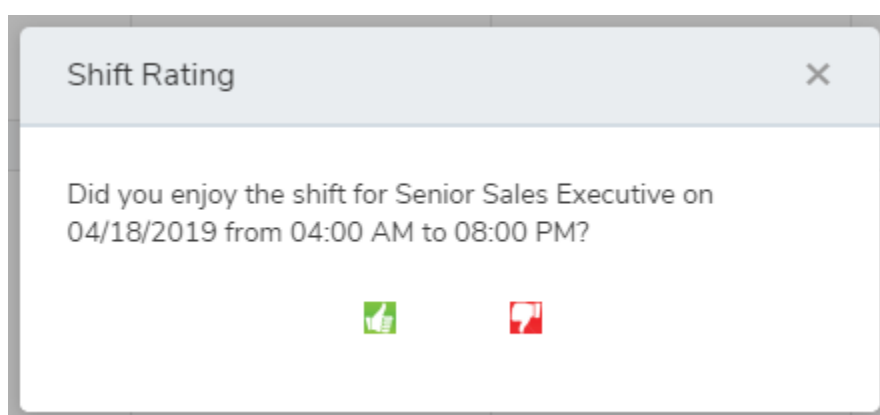
Why can't I see other Departments?

In TimeForge, you won't be able to see other departments unless you are associated with them. To be able to see a department, you must be assigned to that department (you can manage a department without working in the department).

For example, if you are a "Craft Manager" (position) in "Crafts" (department), and all "Craft Managers" are assigned to the "Crafts" department, then you will be able to see what's going on in the "Crafts" department but not what's going on in the "Produce" department unless all "Craft Managers," or just you specifically, are also assigned to "Produce."

If you don't want to assign ALL employees in a particular position to a particular department, you can add employees individually. So, if you only want a specific "Craft Manager" to work in "Produce," you can assign just one employee without assigning all the other "Craft Managers" to "Produce."

Why do my employees see Re-confirm?

TimeForge gives employers the option to have employees confirm their shifts. This allows employers to get a quick visual of which employees are aware of a shift. It can also help ensure that your employee schedule and your actual attendance will be as close as possible. Even though most employees are trustworthy and loyal, occasionally someone may claim ignorance about a given schedule. The "confirm shift" feature gives the employer the chance to prove knowledge about a shift.

Furthermore, an employer can have employees confirm their shift a few days out, and then re-confirm the shift on the actual day it occurs. This is useful for many businesses that have employees out on location such as a catering company.

Configuring these options is easy and can be done in the settings page.

Go to the Settings page under the Set Up tab

While at the Location level, open the **Set Up tab** and select **Settings**.
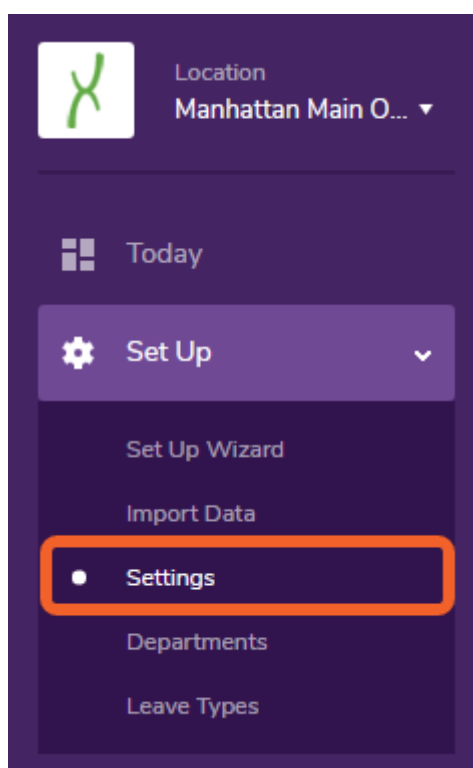
Scroll down

Scroll down the page and look for the setting that reads: **Do you want to enable staff members to confirm the shift multiple times?**

Do you want to enable staff members to confirm their scheduled shifts? Yes ▾ ?

Shifts must be confirmed on the day of the shift? No ▾ ?

Do you want to enable staff members to confirm the shift multiple times? Yes ▾ ?

Do you want to enable staff members to see other staff members availability on the today page? Yes ▾ ?

💡 You can also press CTRL-F on your keyboard to bring up your browser's "find" box. Then, enter in the word "confirm" to search the page for the confirmation settings.

Change the confirm shift option

Employees will be prompted to re-confirm their shifts if the option to confirm multiple times is set to yes.

Set this option to "No" if you don't want your employees to have to re-confirm their shifts.

Do you want to enable staff members to confirm the shift multiple times? No ▾ ?

Click Save to save any changes

If you make any changes, be sure to scroll down and click the **Save** button at the bottom of the page.

Type here to search

Supervisor Reports: Clear List

```
---All Attendance Reports---          ▲      - Attendance Report with Costs
- Attendance Breaks by Employee              - Daily Schedule, Attendance, and Hourly Sales Cheat Sheet
- Attendance Breaks by Position
- Attendance Report                          - Employee Time Sheets, with Requests
- Attendance Report with Costs               - Missed Punch Report, by Employee
- Attendance Summary Report with Costs
- Attendance Summary Report, sorted by Position,
with Costs
- Badge Report CR80                   ▼
```

List of reports to be able to run by supervisors

Save   Cancel

I think TimeForge rocks! How can I recommend it to a friend?

TimeForge is changing how labor management, employee scheduling, and time management is done in businesses around the world. If TimeForge has affected how you schedule your time, we'd love for you to tell your friends about it!

Navigate to your profile

Open the menu in the upper right and select **My Profile**.
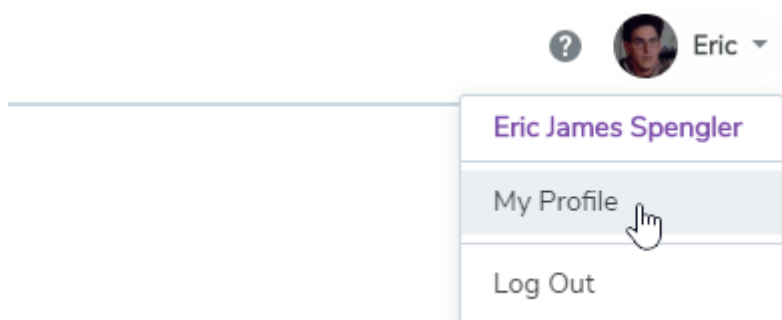
Click Recommend TimeForge to a friend

At the top of the page, you'll see a link to Recommend TimeForge to a friend. Click this link.
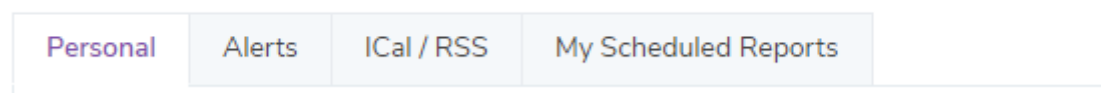
Enter your friend's email address

Enter your friend's email address in the **Send to:** field. You can also customize the Message Subject, and the Message Text.

Recommend TimeForge

You can recommend TimeForge to a friend.

Send To: *	wzeddemore@someemail.com
Message Subject: *	Eric James Spengler wants you to save time, visit Tim
Message Text: *	Eric James Spengler wants you to try TimeForge - Free for 30 days. You can access TimeForge using the following link: http://www.TimeForge.com

Send Recommendation   Cancel

Click Send Recommendation

Click the **Send Recommendation** button to send your recommendation to your friend!

Thank you for recommending TimeForge!

Why should I keep my browser up-to-date?

All web browsers work differently with websites. This due to how the browser operates. In some cases, websites may partially work on one browser and completely stop working on others. If you experience issues using TimeForge (for example, you're unable to view reports or images), it's likely due to an out-of-date browser.

Below, we offer suggestions for keeping your browser up-to-date so that you can take full advantage of TimeForge's features.

Internet Explorer

- Update Adobe Flash Player to the most current version in order view graphics in TimeForge. This solves issue of not being able to see [Reports](#) and [Shift Builder](#) options.
- If you see this error message, "*A script on this page is causing Internet Explorer to run slowly. If it continues to run, your computer may become unresponsive. Do you want to abort the script?*", allow the page to continue loading, and **do not click** Stop Script.

Google Chrome

- Update Adobe Flash Player to the most current version in order view graphics in TimeForge. This solves issue of not being able to see Reports and Shift Builder options.
- If you see this error message, "*A script on this page may be busy, or it may have stopped responding. You can stop the script now, or you can continue to see if the script will complete.*", allow the page to continue loading and **do not click** Stop Script.

Mozilla Firefox

- Update Adobe Flash Player to the most current version in order view graphics in TimeForge. This solves issue of not being able to see Reports and Shift Builder options.
- If you see this error message, *"A script on this page may be busy or it may have stopped responding. You can stop the script now, or you can continue to see if the script will complete."*, allow the page to continue loading and **do not click** Stop Script.

Billing

Change your payment method

At TimeForge, we truly appreciate the relationships we have with our customers. Thank you for your continued patronage, and please feel free to contact us if you ever have any questions, need any new features, or just want to talk about how cool TimeForge is!

Follow the steps below to change your payment method.

Go to the Corporate level

If you have more than one location, you'll need to switch to the Corporate level. Simply click on the drop down arrow in the top left corner of the screen, then click on the name of your business at the top, under the "Corporate Level" heading.
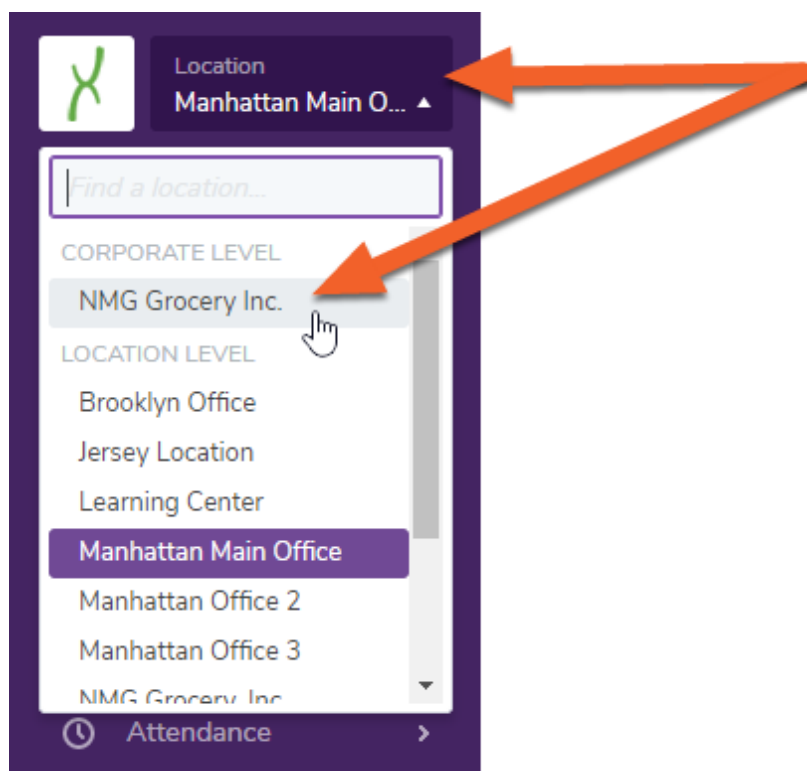
Navigate to Payment Options under the Set Up tab

Open the **Set Up tab**, then select **Payment Options** from the sub-menu.
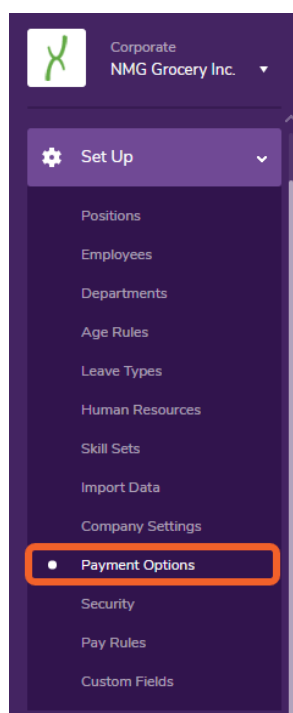
First Time Setup Only

Choose your plan

If this is your first time entering a payment method, you will be prompted to select a plan. Choose one of the available options to continue.

Select One of These Plans	TimeForge Max	TimeForge Scheduling	TimeForge Attendance	TimeForge Human Resources
Fast AutoScheduler™ Scheduling	✓	✓		
Email Reminders for Employees	✓	✓		
Text Message Reminders	✓	✓		
Send Messages to Staff	✓	✓	✓	✓
Employee Shift Swaps	✓	✓		
Schedule using Templates	✓	✓		
Organize by Department	✓	✓	✓	✓
Timecards (Clock in and out)	✓		✓	
Export to Payroll Providers	✓		✓	
Integrate with Other Systems	✓		✓	
Daily Log and Analytics	✓			✓
Management Reports	170	78	72	64
Your Active Employees:	9	9	9	9
Your price:	$31.05	$9.00	$17.55	$9.00
	Choose TimeForge Max	Choose TimeForge Scheduling	Choose TimeForge Attendance	Choose TimeForge Human Resources

💡 Questions about how prices are calculated? See our frequently asked questions for more information.

Fill our your credit card information

The form will automatically fill in your company name and address if you've already provided these under your Company settings. Otherwise, you can enter this information now or make changes to what's there.

Enter your payment information, then click **Continue >>** to apply your changes.

Change Payment Method

Please enter your new payment information below. TimeForge accepts Visa, Mastercard, American Express, and Discover credit cards, as well as eChecks. We proudly use Authorize.Net as our secure payment processor.

Order Summary:

Today's Date: 10/25/2019
Initial Monthly Payment: $31.05 per month

Credit Card Information: Pay By Check

Company Name:	NMG Grocery Inc.
First Name On Card:	Eric
Last Name On Card:	Spengler
Address:	333 Paranormal Ave.
Address (Line 2):	
City:	New York
State:	NY
Zip:	10001
Billing Phone:	
Card Type/Number:	Visa
Card Expiration Date:	MM ▾ YYYY ▾
Card ID (CVV2/CID) Number: [What is the Card ID?]	

Continue >>

Updating your Payment Method

Just need to update your credit card information? No problem! Click the **Change Payment Method** link in the top left corner of the screen, then enter your credit card information.

Payment Options

Send Payment Emails To: Egon Spengler ▾ Additional Email Addresses: espengler@nomoreghosts.c Update

We greatly appreciate your patronage! You are a valued and important customer, and we would love to hear from you about how TimeForge is working for your business. Using this page, you can easily change your monthly TimeForge plan, or you can cancel your account.

Cancel TimeForge Account
Change Payment Method

Authorize.Net

You are currently using the **TimeForge Max** plan.

Select One of These Plans	TimeForge Max	TimeForge Scheduling	TimeForge Attendance	TimeForge Human Resources
Fast AutoScheduler™ Scheduling	✓	✓		
Email Reminders for Employees	✓	✓		
Text Message Reminders	✓	✓		
Send Messages to Staff	✓	✓	✓	✓

Be sure to click **Continue >>** to apply your changes.

Company Name:	NMG Grocery Inc.
First Name On Card:	Eric
Last Name On Card:	Spengler
Address:	333 Paranormal Ave.
Address (Line 2):	
City:	New York
State:	NY
Zip:	10001
Billing Phone:	555-555-5555
Card Type/Number:	Visa ▾ 4111111111111111
Card Expiration Date:	01 ▾ 2030 ▾
Card ID (CVV2/CID) Number: [What is the Card ID?]	000

Continue >>

View previous invoices

TimeForge electronically stores your payment history so that you don't have to worry about keeping up with a pile of paper invoices. You are able to view previous invoices at any time, no matter what features of TimeForge you're using.

However, for security purposes, you will need to either be the account creator, or have authorization from the account creator, in order to view past invoices.

Go to the Payment Options page under the Set Up tab

Open the **Set Up tab** and select **Payment Options**.
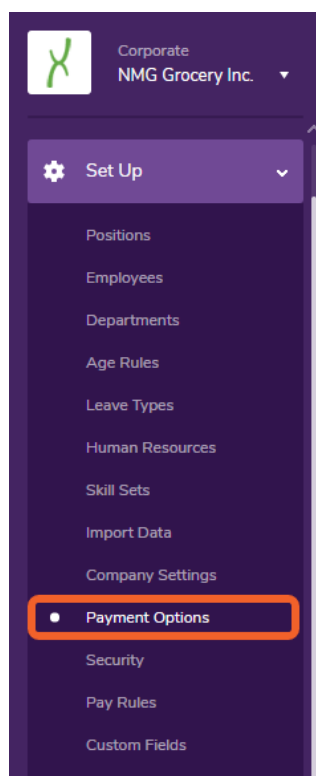
Click the "View Previous Invoices" link

You should see a link to the right of the Update button. Click this link to view your previous invoices.

timeforge

Payment Options

Send Payment Emails To: [Eric James Spengler ▾]   Additional Email Addresses: [   ]   [Update]   *View Previous Invoices*

We greatly appreciate your patronage! You are a valued and important customer, and we would love to hear from you about how TimeForge is working for your business. U:
page, you can easily change your monthly TimeForge plan, or you can cancel your account.
Cancel TimeForge Account
You are currently using the **TimeForge Max** plan.

SELECT ONE OF THESE PLANS	TIMEFORGE MAX	TIMEFORGE SCHEDULING	TIMEFORGE ATTENDANCE	TIMEFORGE HUMA
Fast AutoScheduler™ Scheduling	✓	✓		
Email Reminders for Employees	✓	✓		

View your invoices

You can quickly view all of your invoices for each month you've been with us. Just click on the Invoice Text for a given date or click the PDF link to view, save, or print a PDF copy of the invoice. Also, at the bottom of your invoices page, you can see a total cost of all your invoices.

Invoices

29 invoices found, displaying 1 to 25.

INVOICE DATE	INVOICE TOTAL	PAID	PAYMENT DATE	INVOICE TEXT	INVOICE
02/22/2019		Yes	02/22/2019		PDF
01/22/2019		Yes	01/22/2019		PDF
12/22/2018		Yes	12/22/2018		PDF
11/22/2018		Yes	11/22/2018		PDF
02/22/2017		Yes	02/22/2017		PDF

29 invoices found, displaying 1 to 25.

Total of Invoices:

[Finished!]

Cancel a TimeForge account

TimeForge accounts can be canceled at any time. TimeForge values each and every customer and strives to keep them satisfied and their accounts active, but we understand that we are not always the best fit. Customers are not required to sign any contracts and can cancel their TimeForge accounts at their own discretion. However, here are some helpful things to keep in mind when canceling an account:

1. You are solely responsible for properly canceling your account. An email or phone request to cancel an account is not considered cancellation. You can cancel your account at any time by clicking on the **Payment Options** link in the **Set Up** tab at the top of the screen. The **Payment Options** screen provides a simple, no questions asked cancellation link.
2. All of your content will be immediately deleted from the service upon cancellation. This information cannot be recovered once your account is canceled.
3. If you cancel the service before the end of your current paid up month, your cancellation will take effect immediately and you will not be charged again.

(See our Terms of Service.)

Log into TimeForge

Log in as a manager or account owner. If your account has more than one location in TimeForge, switch to the Corporate level. You'll know you're at the Corporate level if the dropdown at the top of the left side navigation menu reads "Corporate."
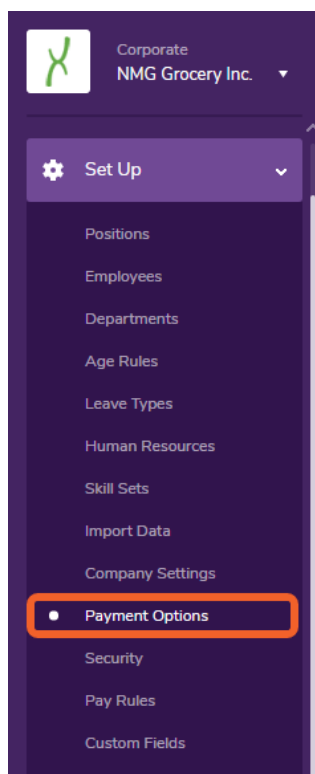
Help! I'm at the location level, how do I switch?

If the menu reads "Location" (as in the image below), just click the down arrow and select the name of your business under CORPORATE LEVEL to switch to the Corporate level.
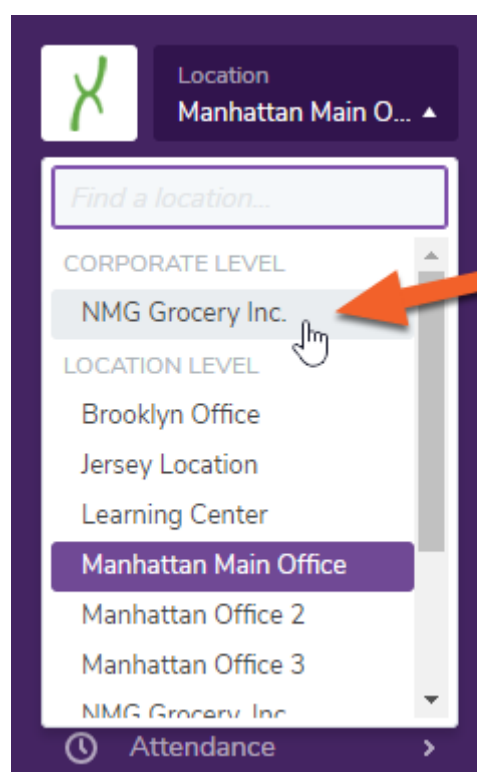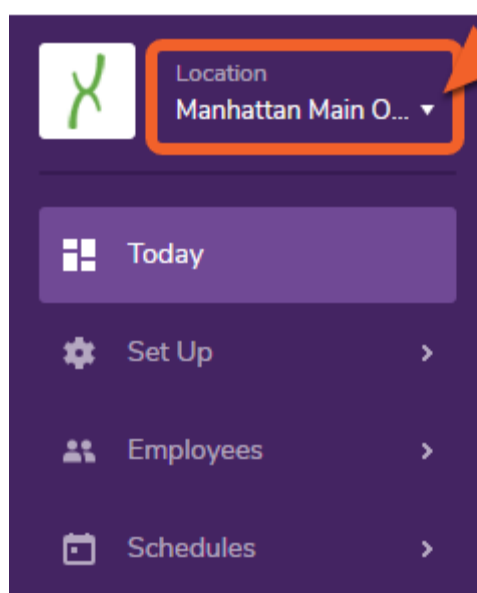
Go to the Payment Options page under the Set Up tab

Open the **Set Up tab** and select **Payment Options**.

Click the "Cancel TimeForge Account" link

Locate and click the blue link that says "Cancel TimeForge Account."

> ⊗ Canceling your account will immediately delete all of your TimeForge settings and data.

Payment Options

Send Payment Emails To: [Eric James Spengler ▾] Additional Email Addresses: [   ] [Update]

We greatly appreciate your patronage! You are a valued and important customer, and we would love to hear from you about how TimeForge is working for your business. Using this page, you can easily change your monthly TimeForge plan, or you can cancel your account.

Cancel TimeForge Account

You are currently using the **TimeForge Max** plan.

SELECT ONE OF THESE PLANS	TIMEFORGE MAX	TIMEFORGE SCHEDULING	TIMEFORGE ATTENDANCE	TIMEFORGE HUMAN RESOURCES
Fast AutoScheduler™ Scheduling	✓	✓		
Email Reminders for Employees	✓	✓		
Text Message Reminders	✓	✓		
Send Messages to Staff	✓	✓	✓	✓
Employee Shift Swaps	✓	✓		
Schedule using Templates	✓	✓		
Organize by Department	✓	✓	✓	✓
Timecards (Clock in and out)	✓		✓	
Export to Payroll Providers	✓		✓	