timeforge

Get started quickly with the Setup Wizard

The TimeForge Setup Wizard makes getting started with TimeForge easy.

The wizard is designed to simplify the process of inputting information that TimeForge needs to help you manage your labor.

The Setup Wizard will walk you through setting up basic information about your company and staff, like basic staff information, a list of your positions, etc.

It also captures your location information, which is displayed on reports (printables), so you never need to worry about determining what schedule applies to which location.

How it works:

The Setup Wizard will also ask you some basic questions about how your store is organized. This information helps TimeForge more accurately customize our systems for your maximum convenience and ease of use. You shouldn't have to re-organize your business just to use our product; TimeForge customizes itself to your business. Our "fill in the blank" format saves you tons of time (money), and makes setting up your account easy and fast.

Information about your employees makes contacting them simple. Just enter their email addresses, and TimeForge automatically emails them with a prompt to set up their account. Once their accounts are set up, TimeForge can notify each employee (according to their preferences) via email, Facebook notification, and/or cell phone message. We make an automatic audit confirming that the employee received notification of the schedule. Never again will you hear, "I didn't know I was scheduled"!

After supplying position and employee information, your basic setup is complete - you're ready to start building a schedule!

💡 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.
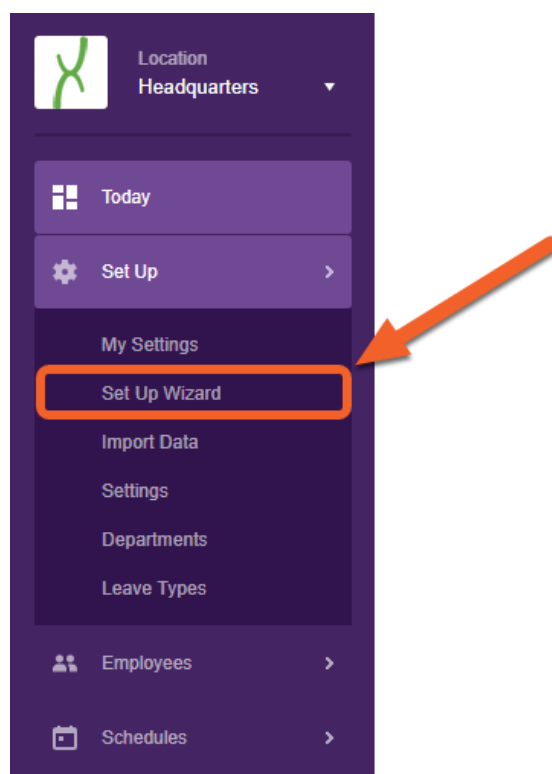
Enter your company and location information

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.

Position Information			
Position Description ?	**Pay Rate** ?	**Pay Scale** ?	**Hourly Rate** ?
* Administrative Assistant	* 8.25	* Hourly ▼	
* EPA Consultant	* 32.00	* Hourly ▼	
* Exterminator Team Lead	* 62000	* Annually ▼	* 29.81
* Field Technician	* 8.75	* Hourly ▼	
* Ghost Grabber	* 9.00	* Hourly ▼	
* HR Director	* 65000	* Annually ▼	* 31.25
* Legal Consultant	* 78.00	* Hourly ▼	
* Office Assistant	* 7.50	* Hourly ▼	
* Paranormal Researcher	* 54000	* Annually ▼	* 25.96
* Senior Ghost Grabber	* 14.00	* Hourly ▼	
* Senior Spectre Exterminator	* 18.00	* Hourly ▼	
* Spectre Exterminator	* 16.00	* Hourly ▼	
* Supernatural Expert	* 64000	* Annually ▼	* 30.77

Continue - Add Employees

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.

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!