

# R365 Scheduling Quick Start Guide

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**Restaurant365**

This Quick Start Guide will take you through the entire R365 Scheduling Module and have you building Schedules and saving money, starting today!

## The Basics

Before digging into a deep dive of Scheduling, follow this checklist to cover the basics of R365 Scheduling for your Restaurant Location:

- ✓ **Inactivate Employees** (<https://help.restaurant365.net/en/support/solutions/articles/12000076176>), that will not be scheduled in R365 (Salaried Employees, etc.)
- ✓ **Merge multiple records** (<https://help.restaurant365.net/en/support/solutions/articles/12000039121>), of the same Employee across Locations into one Employee record if that person works at multiple restaurants
- ✓ **Exclude Jobs** (<https://help.restaurant365.net/en/support/solutions/articles/12000080738>), from the schedule that will not be scheduled
- ✓ **Color code** (<https://help.restaurant365.net/en/support/solutions/articles/12000077332>), the remaining jobs for easy classification
- ✓ **Create a Schedule** (<https://help.restaurant365.net/en/support/solutions/articles/12000094373>), of **Shifts** (<https://help.restaurant365.net/en/support/solutions/articles/12000055802>), without any Employees assigned
- ✓ Save as a **Scheduler Template** (<https://help.restaurant365.net/en/support/solutions/articles/12000094372>), once complete for easy Scheduling in the future
- ✓ Give **Employees 'App Access'** (<https://help.restaurant365.net/en/support/solutions/articles/12000039120>), once you are ready for them to gain access to the **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>).

Want to tackle more advanced Scheduling? Follow this checklist in addition to the checklist above:

- ✓ Navigate to the **Location record** (<https://help.restaurant365.net/en/support/solutions/articles/12000039165>) and add the following:
  - Burdened Labor Estimates
  - Labor % Goal
  - SPLH Goal
  - Day Parts
- ✓ Create a **Sales Forecast** (<https://help.restaurant365.net/en/support/solutions/articles/12000077210>), for the current period. One of the Smart Forecasts is a great starter!
- ✓ Setup your restaurant's **Request Cutoffs** (<https://help.restaurant365.net/en/support/solutions/articles/12000077397>).
- ✓ Track overtime in R365 rather than your POS with User-created **Overtime Rules** (<https://help.restaurant365.net/en/support/solutions/articles/12000077430>).
- ✓ Explore **Additional Labor Rules** (<https://help.restaurant365.net/en/support/solutions/articles/12000091679>), to help with compliance
- ✓ Create **Departments** (<https://help.restaurant365.net/en/support/solutions/articles/12000077346>), to break down goals and division of Labor even more
- ✓ Explore **Schedule Enforcement** (<https://help.restaurant365.net/en/support/solutions/articles/12000069936>), add-on to manage Em Punches more closely

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- ✓ Explore the **Smart Labor** (<https://help.restaurant365.net/en/support/solutions/articles/12000078052>) module

### Step 1: Setting up your Employees for R365 Scheduling

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### Step 2: Review Jobs and Job Responsibilities

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### Step 3: Setup Departments

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**Step 4: Announcements, Blackout Days, Events & Sites**

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**Step 5: Building Your First Schedule**

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**Step 6: Publishing Schedules**

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**Step 7: Managing Employee Requests**

**In the Browser:**

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**In the R365 App:**

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