

STAFFMATE ONLINE CATEREASE

Client Interface Instruction Manual

StaffMate Online and Caterease have collaborated to provide an interface capable of instantly transmitting event and venue data from your Caterease account to your StaffMate Online account. This will allow your event planners the ability to “order” staff from your scheduling coordinators more quickly and efficiently.

IMPORTANT LEGAL NOTES

- a) This interface is a free upgrade to your StaffMate Online licensed software and therefore your StaffMate Online software License Agreement and the StaffMate Online Web site Terms and Conditions govern use of this interface.
- b) Use of the interface requires that both your StaffMate Online and Caterease accounts remain in good standing.
- c) The interface is provided on an as-is basis with no warranty, expressed or implied. Please reread your StaffMate Online License Agreement (link located at the bottom of every page of your account) and the StaffMate Online Web site Terms & Conditions (located at the following Web site page: http://www.staffmate.com/staffmate_legal.php) for full legal information regarding your StaffMate Online account, which now includes the StaffMate Online/Caterease interface.
- d) You and your staff members are solely responsible for reviewing and verifying import data for accuracy and completeness.

HOW IT WORKS

Importing event-related information into StaffMate Online is easy. First, review your Caterease documentation for instructions on initiating the export.

Once you arrive to the StaffMate Online interface, you will be asked to verify the information that we will be importing. Information verification is very important as this interface was designed to eliminate duplicate work AND improve communication. Use this verification opportunity to review the information being transmitted and make modifications as necessary.

After all, there may be information in the Caterease account that you may not necessarily want reflected within StaffMate Online. Changes you make on this Import Verification page will ONLY affect the information being imported into your StaffMate Online account. Changes made here WILL NOT affect information in your Caterease account.

WHAT CAN BE IMPORTED?

Information automatically imported is limited to the information available from your Caterease account. If, for example, there is no Staffing Budget in Caterease, it will import as a blank field on the Import Verification page. But, on the Import Verification page, you can easily assign a Staffing Budget value by entering one into the space provided.

Information we will retrieve from your Caterease account for importation:

Event Title	Event Date	Event Start Time	Event End Time
Event Description	Admin Only Desc.	Staffing Budget	Venue Name
Venue Address	Venue Address 2	Venue City	Venue State
Venue Zip	Venue Contact	Venue Phone	Venue Email
Venue Directions	Set Up Time	Event Number	

NOTE: Event Numbers are used by StaffMate Online to verify that an event has not already been imported. Changing an event number within StaffMate Online could cause you to accidentally import a duplicate event.

CONTINUING THE IMPORTATION PROCESS

Once you complete your verification of the event and venue data by clicking the button entitled “Verify Event Info” in the lower right hand corner of the Import Verification page, an automated email is instantly dispatched to the scheduling coordinator (the Super Admin listed within your StaffMate Online account) to alert him or her to the new event in need of staff.

At this point, you will be transported to a page upon which you can enter staffing requirements for the newly imported event. Those of you familiar with StaffMate Online will recognize the page as one that is very similar to the page upon which you enter staffing requirements within StaffMate Online and the basic process is the same too.

STAFFING REQUIREMENTS INSTRUCTIONS

In this final step of the event importation process, you will be asked to enter position titles and shifts that you require to staff this event. Each position title with a unique shift start or end time requires a separate entry. For example, if you need 10 wait staff from 4:30 pm to 6:30 pm and 5 more wait staff from 5 pm to 10 pm, it would require two separate entries. This step of the process is a revolving step. This means that each time you enter a new position/shift, you will be returned to this page to enter more positions/shifts as needed.

Position Type: This is a required field. Choose a position type that you need for this event from the drop-down list provided. The position titles displayed here are the positions you have previously entered in the Positions section of the StaffMate Online service.

Shift Start Time & Shift End Time: These fields are required. Enter the shift start time and end time you are scheduling in this field. Pay particular attention to the AM & PM options. An error in this field can cause undesirable effects elsewhere in the StaffMate Online service. NOTE: Noon = 12:00pm & Midnight = 12:00am.

End Time Display: StaffMate Online allows you to "disguise" shift end times to help you alleviate issues arising from making them public.

Number of Staff Needed: This is a required field. Enter the number of employees you need for this position title at this particular shift time.

When you have finished entering this first position title and shift times, click the button entitled "Add These Shifts" to add these shifts and return to this page to enter more shifts. Once returned to this page, you will see the newly added shifts at the bottom of the page. You can continue to add position titles and shifts as desired and click the button entitled "Add These Shifts" to add the shifts and return to this page to add more.

Once you are finished adding positions to this event, you may click the button entitled "Verify & Finalize Staff Order" to complete the importation process and return to Caterease.

Optionally Importing Shift Data

In order to make it even easier for our clients to import information into StaffMate Online, we, in conjunction with CaterEase, have included the optional ability to import shift data into StaffMate Online.

For example, you have an event for which you have already entered shift requirements and shift start and end times within CaterEase. You can, with this optional add-on to the interface, import the position titles and shift times directly into StaffMate Online so that you don't have to enter positions/shifts manually within the interface itself.

The add-on is optional because, in order to efficiently import shift information to StaffMate Online, we would like you first to read, understand and agree to the following:

1. Position titles within StaffMate Online and your CaterEase account must match exactly. If you wish to use the import shift data feature, please take a moment **now** to change the StaffMate position titles to match those in CaterEase.
2. Shift data can only be imported during the same session within which you are importing the applicable event and venue data. You cannot import shift data for events that already exist within StaffMate Online.
3. If you consistently import events into StaffMate Online that do not have shift start & end times or where the position titles don't match exactly, you will receive an "Issue" page instructing you how to, in the future, perform the import correctly. You will then be instructed to manually enter failed imported shifts (those that had incorrect titles or non-existent start times or end times) for the event you are currently importing. There is nothing wrong with this other than it could create import confusion (correct shifts will be imported while incorrect shifts need to be entered manually) and the issue will add a page and a step where there does not need to be one, thus harming efficiency and communication, rather than aiding it.
4. You will need to choose a default End Time Display that you would like to use for imported shifts: Actual Shift End Time, Approx. Shift End Time, TBD or ???.

I Want To Import Shift Data. Default End Time Display:

Please understand that in order for the shift data import feature to work efficiently, position titles need to match exactly between your StaffMate Online and CaterEase accounts and shift start and end times should be entered into CaterEase prior to beginning importation into StaffMate Online. Otherwise, your staff will be asked to manually enter the shift data that failed to import properly. It is solely the responsibility of your staff to verify event, venue and shift data prior to executing the import into StaffMate Online.

I have read and fully understand this entire document. Initials:

SAVE THIS COMPLETED FILE AND EMAIL TO support@staffmate.com