



SAF *Amelia* **2015**
ISLAND

SEPTEMBER 9-12

131st ANNUAL CONVENTION

Ritz-Carlton Amelia Island | Amelia Island, Fla.



Society of American Florists

Application Management





Challenge:

- Managing Resumes/Applicants
- Reviewing Resumes
- Feeling of Wasting Time
- Complicated Multiple Processes
- Difficult to Reply to All Applicants

snagajob™






THE DREAM BEGINS WITH THE RIGHT JOB.

Job List

Temporary Management...  **Jobs** Applicants Employees  Hi Mercedes  

Status:
Active (9)
Inactive (13)
All (18)

Location:
All Locations ▼





Job Title	Location	Open Date ▼	Total Applications	Activate
Floral Designer	Dr Delphinium Orchid House - 02 Richardson, TX	09/02/14	38	<input checked="" type="checkbox"/> 
Retail Sales	Dr Delphinium Designs and Events - Lovers Location Dallas, TX	09/02/14	141	<input checked="" type="checkbox"/> 
Warehouse Assistant	Dr Delphinium Design Center - Dallas Location Dallas, TX	09/02/14	348	<input checked="" type="checkbox"/> 
Delivery Driver	Dr Delphinium Design Center - Dallas Location Dallas, TX	08/30/13	84	<input checked="" type="checkbox"/> 
Customer Relationship Specialist	Dr Delphinium Design Center - Dallas Location Dallas, TX	08/30/13	60	<input checked="" type="checkbox"/> 



Showing 1-5 of 5 entries. Show entries at a time.

Applicant List



Temporary Management...		Jobs	Applicants	Employees	Search	Hi Mercedes	Profile	Notifications
Status:	Score	Name	Availability	Date applied	Star			
New (7)	80	Karina [REDACTED]	M T W Th F S Su >	Aug. 18, 2015	☆			
Reviewed (16)		[REDACTED]						
Interviewed (0)		Driver: Delivery Driver						
Declined (33)								
All (56)								
Positions:	85	Stephanie [REDACTED]	M T W Th F S Su >	Aug. 17, 2015	☆			
All positions		Management: Management						
All positions		[REDACTED]	M T W Th F S Su >	Aug. 17, 2015	☆			
Driver: Warehouse Assistant		[REDACTED]						
Hourly: Retail Sales Associate		[REDACTED]						
Hourly: Customer Relationship Specialist		Hourly: Retail Sales Associate						
Driver: Delivery Driver		[REDACTED]						
Hourly: Floral Designer		Rebella [REDACTED]	M T W Th F S Su >	Aug. 11, 2015	☆			
Management: Management		[REDACTED]						
30 days		Management: Management						
	74	Carisa [REDACTED]	M T W Th F S Su >	Aug. 07, 2015	☆			
		[REDACTED]						
		Management: Management						


Applicant Profile


Temporary Management...  Jobs Applicants Employees  Hi Mercedes  

 **Karina** 

Status: Reviewed

 Dallas, TX  **Position:** Driver: Delivery Driver


@yahoo.com **Applied:** 08/18/2015



Hire




Transfer






















Decline Karina?

 Print

Application **Assessment** Interview Background Check Notes

AVAILABILITY

 Morning  Afternoon  Evening

Mon	Tue	Wed	Thu	Fri	Sat	Sun
						
						
						

Test Results

Temporary Management... Jobs Applicants Employees Hi Mercedes

Application Assessment Interview Background Check Notes

Math

Language

Reading

Behavior

Karina 's behavior result is **93** relative to a position in the **Delivery Driver Industry**

Pros

- Aware of assets and shortcomings
- Can work in disorderly conditions
- Has a preference for individual work
- Not focused on promotions
- Will not adjust plans unless necessary

Cons

- May not realize when a coworker needs help
- Too self-reliant at times

[Click here to view the full behavioral assessment report](#)

PeopleAnswers Business Edition

Interview Questions

Temporary Management... Jobs Applicants Employees Hi Mercedes

Application Assessment Interview Background Check Notes

Call now to schedule an interview with: Karina Urias 214 [REDACTED] Once you schedule your interview with Karina, note the date and time here. That way, when looking at your list of applicants, you'll have a bird's-eye view of who you've decided to interview and when.

Keep track of your interview with Karina Urias:

Date	Time
<input type="text"/>	<input type="text"/>

QUESTIONS SPECIFIC TO THIS APPLICANT

- karina spends a moderate amount of time thinking about others and trying to understand their deeper concerns. Whereas, success in this position requires actions that are not influenced by others' thoughts or motivations.
- Question: Do you feel that you possess a natural ability to read people? Do you enjoy reading people or do you generally take people at "face value?"
- **karina has a very good understanding of how others think. This may hinder her ability to remain unbiased on certain issues.**
How would you deal with a situation in which your opinion was vastly different from another coworker? What challenges would you face? Under which circumstances do you think it is important to compromise?
- **karina likes to consider the needs of others and may sacrifice her own needs in the process.**
How important is it for you to respond to the needs of others? Have you ever neglected your own needs in doing so? What are the advantages and disadvantages of considering others' needs?
- **Peoples' feelings are important to karina. She will react negatively in situations where others' feelings are neglected.**
How would you handle a company decision that negatively impacted its employees? How important is it to look after the needs of employees?
- karina values a moderate amount of guidance from others, but she can be self-directed when necessary. On the contrary, success in this role is associated with a

Background Check

Temporary Management... Jobs Applicants Employees Hi Mercedes

Application **Assessment** Interview Background Check Notes

STATUS

This background check needs attention to proceed.

This background check is awaiting your approval or denial.

Approve

Deny

[View background check report](#)

Questions about this background check? Contact TalentWise at 1-866-338-6739

ACTIVITY TRACKER

Date and Time (EST)	Action	By
08/17/15 02:56:59 PM	Status updated - Alert	TalentWise
08/17/15 02:56:10 PM	Status updated - Pending	TalentWise
07/24/15 02:04:57 PM	Background Check check requested	Mercedes Contreras

Snag-a-Job

- More Efficient
- Save Time
- More Consistent
- Less Complicated
- Better Serve our Applicants

Human Resources

Challenges:

- No Clear Applicant Process
- Inconsistent Training
- Lacked Organization
- Too Much Paper!

bamboohR™



Organized Applicant Tracking

Matlack Florist

Dashboard My Info Employees **Job Openings** Reports Files

Search...

Delivery Associate

Delivery - West Chester, Pennsylvania

Edit Job Opening

Looking for Delivery Drivers and Delivery Supervisor

Matlack Florist is looking for personable, reliable and professional candidates to join our delivery team. Duties include...

View Full Job Description

Hiring Lead: **Kathryn Delaney** Status: **Filled**


Link to this job: <https://matlackflorist.bamboohr.com/jobs/view/>

Share this job:

Showing: All

Date	Rating	Name	Phone	Status
Aug 24, 2015	☆☆☆	Dan Driver		Hired
Oct 30, 2014	☆☆☆	Michael		New (Today)
Oct 30, 2014	☆☆☆	Kadarrell		New (Today)
Oct 30, 2014	☆☆☆	Tyree		New (Today)
Oct 30, 2014	☆☆☆	Walter		Interviewed (Today)
Oct 30, 2014	☆☆☆	Jason		Not a Fit
Oct 30, 2014	☆☆☆	Shanavia		Checking References (Today)
Oct 30, 2014	☆☆☆	Michael		Schedule Phone Screen (Today)
Oct 30, 2014	☆☆☆	Camry		Schedule Interview (Today)
Oct 07, 2014	☆☆☆	Conor		Phone Screened (Today)
Sep 18, 2014	☆☆☆	Dana		Interviewed (338 days ago)
Aug 06, 2014	☆☆☆	James		Reviewed (341 days ago)
Jul 31, 2014	☆☆☆	Jessica		Not a Fit
Jul 30, 2014	☆☆☆	Rontune		Not a Fit

Streamlines Onboarding Tasks



Onboarding


Hire Date
Aug 24, 2015

123456

Part-time

Delivery

West Chester

Manager
 Kathryn (Kate) Delaney

Onboarding Tasks

Pre-Hire

- Job Description Unassigned No due date
- Position Advertised Unassigned No due date
- Employment Application Unassigned No due date
- Interview Unassigned No due date
- Resume Unassigned No due date
- Offer Letter/Email Unassigned No due date

New Hire Paperwork

- Business Conduct Guidelines Kathryn (Kate) Delaney - Aug 24, 2015
- Employee Handbook Kathryn (Kate) Delaney - Aug 24, 2015
- Internet Policy Kathryn (Kate) Delaney - Aug 24, 2015
- Conduct, Handbook, Internet Policies Signature Kathryn (Kate) Delaney - Aug 24, 2015
- Driver's License Information - Scan Color Copy Kathryn (Kate) Delaney - Aug 24, 2015
- Workers Comp Employee Notification Kathryn (Kate) Delaney - Aug 24, 2015
- Form W-4 Kathryn (Kate) Delaney - Aug 26, 2015
- Direct Deposit Form Kathryn (Kate) Delaney - Aug 29, 2015

New Hire Systems Overview

- MAS Login Information Kathryn (Kate) Delaney - Aug 24, 2015
- MAS Employee Number Kathryn (Kate) Delaney - Aug 24, 2015

RightSignature Integration

Matlack Florist 18

Dashboard My Info Employees Job Openings Reports Files

Reports / RightSignature® /

Send documents for signature

Send To
Dan Driver.
An email with a link to sign the electronic documents will be sent.

Files to sign
Direct Deposit Form

Subject

Message

[Request E-Signature](#)



RightSignature

Streamlines Training

Matlack Florist

Dashboard My Info **Employees** Job Openings Reports Files

Search...

Dan Driver
Delivery Associate

7 of 26 « Prev | Next »

Personal Job Time Off Emergency Documents Notes Benefits **Training** Performance Driving More ▾

Training Reorder Fields

Upcoming

Title	Category ▾	Due	Complete
Ready for Independent Early Deliveries Required One-time	DELIVERY		✓ Record
Care & Handling - Leaving/Returning Product Required Every 3 months	DELIVERY		✓ Record
Ready for Independent On Call Deliveries Required One-time	DELIVERY		✓ Record
Advances Trip Routing With Map Required One-time	DELIVERY		✓ Record
Routing Trips Independently Required One-time	DELIVERY		✓ Record
Check Out / In Training Required One-time	DELIVERY		✓ Record
Ride-Along Required One-time	DELIVERY		✓ Record
Zone 6 & 7 Trips Required One-time	DELIVERY		✓ Record
Care & Handling - Loading Truck Required One-time	DELIVERY		✓ Record
MAS System Overview Required One-time	DELIVERY		✓ Record

123456
Part-time
Delivery
West Chester

Manager
Kathryn (Kate) Delaney

Paid Time Off Tracking

Personal Job **Time Off** Emergency Documents Notes Benefits Training Performance Driving More ▾

Time Off

Balances

 Calculate Balance

 Record Time Off

Accrual Level Start Date: 08/13/2008

Time Off	Current	Scheduled	Available	Accrual Policy
Holidays	19.20 hours	0.00 hours	19.20 hours	Holidays - Part 40% 01/01/2015
Vacation	48.93 hours	0.00 hours	48.93 hours	Vacation - Part 40% - Accelerated 01/01/2015

History

Holidays ▾

2015 ▾

Show: Earned/Used | Requests

Date	Description	Used (-)	Accrued (+)	Balance
01/01/2015	Holidays Accrual for 01/01/2015 to 12/31/2015		19.20	19.20 hours

Streamlines Offboarding Tasks

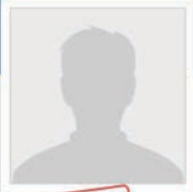
The screenshot displays a web application interface for Matlack Florist. At the top, the company logo "Matlack Florist" is visible. Below the logo is a navigation bar with tabs for "Dashboard", "My Info", "Employees", "Job Openings", "Reports", and "Files". A search bar is located on the right side of the navigation bar. The main content area is titled "Dan Driver" and "Delivery Associate". Below this, there are tabs for "Personal", "Job", "Time Off", "Emergency", "Documents", "Notes", "Benefits", "Training", "Performance", "Driving", and "More". The "Offboarding" tab is selected, showing a list of "Offboarding Tasks". The tasks are listed in a table with checkboxes and descriptions, including "Termination Letter - Produced & Signed", "Return Store Key(s)", "Remove from Google Apps", "Remove from WhenIWork Scheduling App", "Change Computer Passwords", "Delete Email Addresses", "Driver - Delete Gasoline Pin Number", "Return All Property of Matlack Florist", "Remove from Televantage Directory", "Move to Inactive Status in BambooHR", "Move Paper File to Terminated Folder", and "Pay Out PTO Balances".

12 new items added


Matlack Florist

Dashboard My Info **Employees** Job Openings Reports Files

Search...

 **Dan Driver**
Delivery Associate

Personal Job Time Off Emergency Documents Notes Benefits Training Performance Driving More ▾

 Offboarding

Offboarding Tasks + Add ⚙

Termination

- Termination Letter - Produced & Signed Kathryn (Kate) Delaney - Aug 24, 2015
- Return Store Key(s) Kathryn (Kate) Delaney - Aug 24, 2015
- Remove from Google Apps Bernard (Bernie) W. Ebersole III - Aug 24, 2015
- Remove from WhenIWork Scheduling App Kathryn (Kate) Delaney - Aug 24, 2015
- Change Computer Passwords Bernard (Bernie) W. Ebersole III - Aug 24, 2015
- Delete Email Addresses Kathryn (Kate) Delaney - Aug 24, 2015
- Driver - Delete Gasoline Pin Number Bernard (Bernie) W. Ebersole III - Aug 24, 2015
- Return All Property of Matlack Florist Kathryn (Kate) Delaney - Aug 24, 2015
- Remove from Televantage Directory Kathryn (Kate) Delaney - Aug 24, 2015
- Move to Inactive Status in BambooHR Bernard (Bernie) W. Ebersole III - Aug 25, 2015
- Move Paper File to Terminated Folder Bernard (Bernie) W. Ebersole III - Aug 26, 2015
- Pay Out PTO Balances Bernard (Bernie) W. Ebersole III - Aug 24, 2015

INACTIVE

driver@matlackfloris...

Terminated
08/24/2015

123456

Part-time

Delivery

West Chester

Manager
Kathryn (Kate) Delaney

Bamboo HR

- Improved Applicant Process
- Clear communication between trainer and trainee.
- Information is at the employee's fingertips!
- Management can easily track job information.

Scheduling

Challenges

- No centralized place to hold schedules
- No standard method of creating schedules
- No accountability between the schedule and actual time worked
- Reporting was too late
- Reporting not available to the manager

paylocity



Standardized Schedules

							Copy	Paste	Delete	Add Shift	More		
JENNIFER L	45		09:00 AM - 06:30 PM Unassigned			09:00 AM - 06:30 PM Unassigned	07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned	08:00 AM - 02:00 PM Unassigned			39.5 hrs	0 hrs
JULIE M	3114		07:30 AM - 04:00 PM Unassigned	09:00 AM - 06:30 PM Unassigned		07:30 AM - 04:00 PM Unassigned	09:00 AM - 06:30 PM Unassigned	07:30 AM - 04:00 PM Unassigned				42 hrs	0 hrs
KATHERINE S	359		09:00 AM - 06:30 PM Unassigned	07:30 AM - 04:00 PM Unassigned		07:30 AM - 04:00 PM Unassigned	09:00 AM - 06:30 PM Unassigned	07:30 AM - 04:00 PM Unassigned				42 hrs	0 hrs
KYLE C	3139		07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned		07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned				40 hrs	0 hrs
LAUREN D	3132		07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned		07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned	07:30 AM - 04:00 PM Unassigned				40 hrs	0 hrs
MAX R	462		Vacation - 9.5 hrs Approved	Vacation - 8.5 hrs Approved		09:00 AM - 06:30 PM Unassigned	07:30 AM - 04:00 PM Unassigned	09:00 AM - 06:30 PM Unassigned				26 hrs	18 hrs
			08:00 AM -	08:00 AM -		08:00 AM -	08:00 AM -	08:00 AM -					

Time and Attendance

<input type="checkbox"/>	Date	Pay Type	Amount	In	Out	In	Out	Reg
<input type="checkbox"/>	Sun 08/09/2015	None ▼						0.00 hrs
<input type="checkbox"/>	Mon 08/10/2015	ALO ▼	0.5 hrs					8.95 hrs
				07:25 AM	01:37 PM L	02:05 PM L	04:20 PM ⚠	
<input type="checkbox"/>	Tue 08/11/2015	ALO ▼	0.5 hrs					10.10 hrs
				08:32 AM ⚠	02:32 PM L	03:02 PM L	06:38 PM	
<input type="checkbox"/>	Wed 08/12/2015	ALO ▼	0.5 hrs					10.50 hrs
				07:23 AM	01:30 PM L	01:54 PM L	05:47 PM ⚠	
<input type="checkbox"/>	Thu 08/13/2015			07:29 AM ⚠	01:29 PM L	01:59 PM L	06:37 PM	10.45 hrs
<input type="checkbox"/>	Fri 08/14/2015	ALO ▼	0.5 hrs					0.00 hrs
				07:52 AM ⚠	01:52 PM L	02:22 PM L	04:10 PM 📄	
<input type="checkbox"/>	Sat 08/15/2015			09:34 AM	03:28 PM			0.00 hrs
<input type="checkbox"/>	Sun 08/16/2015	None ▼						0.00 hrs
<input type="checkbox"/>	Mon 08/17/2015	ALO ▼	0.5 hrs					9.80 hrs
				08:48 AM	02:48 PM L	03:18 PM L	06:36 PM 📄	
<input type="checkbox"/>	Tue 08/18/2015			07:21 AM	01:39 PM L	02:08 PM L	05:00 PM ⚠	9.17 hrs
<input type="checkbox"/>	Wed 08/19/2015			08:51 AM	01:55 PM L	02:14 PM L	06:34 PM	9.40 hrs
<input checked="" type="checkbox"/>	Thu 08/20/2015	Vacation ▼	8 hrs 📄					8.00 hrs
<input checked="" type="checkbox"/>	Fri 08/21/2015	Vacation ▼	4 hrs 📄					4.00 hrs
<input type="checkbox"/>	Sat 08/22/2015	None ▼						0.00 hrs

E-mailed Reports

Employee Number: 359

Name: KATHERINE S

Tardy Activity

Clock In

8/11/2015 7:00:00 AM

8/14/2015 7:29:00 AM

8/18/2015 8:40:00 AM

8/20/2015 7:28:00 AM

8/22/2015 7:38:00 AM

Tardy

Early 0.50

Late 0.00

Early 0.33

Late 0.00

Early 0.37

Clock Out

8/11/2015 4:05:00 PM

8/14/2015 4:35:00 PM

8/18/2015 6:37:00 PM

8/20/2015 4:27:00 PM

8/22/2015 1:02:00 PM

Tardy

Late 0.00

Late 0.58

Late 0.00

Late 0.45

Early 0.97

Clock In Totals

Total Early: 1.20

Total Late: 0.00

Times Early: 3

Times Late: 0

Clock Out Totals

Total Early: 0.97

Total Late: 1.03

Times Early: 1

Times Late: 2



Scheduling

Challenges:

- Creating, Editing & Sharing Paper Schedules
- Communicating Changes With Staff
- No Streamlined Process For Time-Off Requests
- Too Much Paper!



When I Work[®]



Organized Schedule in the

12 DASHBOARD SCHEDULER TIME CLOCK Need help? Chat now

EVERYTHING PUBLISHED NO CHANGES

SHIFT POSITION

Store

Positions ALL +

- No Position
- Office
- Delivery
- Wedding Setup/Delivery
- Store Merchandising
- Outside Plant Sales
- Sales
- Design
- Plants
- Store Support Staff
- School Help

Aug 24 - Aug 30, 2015

LABOR BUDGET TODAY DAY WEEK MONTH

STAFF	MON 24	TUE 25	WED 26	THU 27	FRI 28	SAT 29	SUN 30
OpenShifts™							
Janet 0 / 31.5 / 40	9a - 5:30p SALES			9a - 5:30p SALES	9a - 5:30p SALES	9a - 5p SALES	
Suzanne 0 / 8 / 40	UNAVAILABLE	TIME OFF ALL DAY	9a - 5:30p SALES	TIME OFF ALL DAY		TIME OFF ALL DAY	
Erin 0 / 15.5 / 40		9a - 5:30p SALES				9a - 5p SALES	
Chris 0 / 34.25 / 45		9a - 5:30p SALES	8:45a - 5:30p STORE MERCHANDIS	8:45a - 5:30p STORE MERCHANDIS	8:45a - 5:30p STORE MERCHANDIS	TIME OFF ALL DAY	
Nicole 0 / 32.75 / 45	9a - 5:30p SALES	8:45a - 5:30p SALES	9a - 5:30p SALES	9a - 5:30p SALES		TIME OFF ALL DAY	
Elizabeth 0 / 15.5 / 0					9a - 5:30p SALES	9a - 5p SALES	
Stephanie 0 / 39.75 / 40	8:45a - 5p OFFICE	8:45a - 5:30p OFFICE	8:45a - 5p OFFICE	8:45a - 5p OFFICE	8:45a - 5p OFFICE		
Sue 0 / 34 / 0	8a - 5p DESIGN	9:30a - 12p DESIGN		8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 4:30p DESIGN	
Deborah 0 / 39.5 / 45		8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 4:30p DESIGN	
Colleen 0 / 15.5 / 40	UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	8:30a - 5p DESIGN	UNAVAILABLE	8:30a - 4:30p DESIGN	
Ivon 0 / 31.5 / 40	8:30a - 5p DESIGN		8:30a - 5p DESIGN		8:30a - 5p DESIGN	8:30a - 4:30p DESIGN	
Anne Marie 0 / 40 / 45	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	TIME OFF ALL DAY	
Martha 0 / 39.5 / 40		8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 4:30p DESIGN	
Barbara 0 / 10 / 40	8a - 5p STORE SUPPORT STAFF		8a - 5p STORE SUPPORT STAFF				

Easy Creation & Editing

12 DASHBOARD SCHEDULER TIME CLOCK Need help? Chat now!

PUBLISH & NOTIFY
13 CHANGES | ALL POSITIONS

SHIFT POSITION

Store

Positions ALL +

- No Position
- Office
- Delivery
- Sales
- Design

Sep 14 - Sep 20, 2015

LABOR BUDGET TODAY DAY WEEK MONTH

STAFF	MON 14	TUE 15	WED 16	THU 17	FRI 18	SAT 19	SUN 20
OpenShifts™							
Janet 0/0/40							
Suzanne 0/0/40	UNAVAILABLE						
Erin 0/7.5/40			TIME OFF (PENDING)			9a - 5p SALES	
Chris 0/0/45							
Nicole 0/0/45	TIME OFF ALL DAY						
Elizabeth 0/7.5/0	UNAVAILABLE	UNAVAILABLE		UNAVAILABLE	UNAVAILABLE	9a - 5p SALES	
Stephanie 0/38.75/40	8:45a - 5p OFFICE	8:45a - 5p OFFICE	8:45a - 5p OFFICE	8:45a - 5p OFFICE	8:45a - 5p OFFICE		
Sue 0/0/0							
Deborah 0/0/45							
Colleen 0/0/40	UNAVAILABLE	UNAVAILABLE	UNAVAILABLE		UNAVAILABLE		
Ivon 0/0/40							
Anne Marie 0/0/45							
Martha 0/24/40	8:30a - 5p DESIGN	8:30a - 5p DESIGN	8:30a - 5p DESIGN	TIME OFF ALL DAY			

Availability Clearly Communicated

NEW AVAILABILITY PREFERENCE Advanced Mode Watch a Tutorial ▶

DAY	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
Sunday	All Day																							
Monday	All Day												12:30p - 5p											
Tuesday	All Day	All Day																						
Wednesday	All Day	All Day																						
Thursday	All Day								8a - 12p															
Friday	All Day	All Day																						
Saturday	All Day																							

CLEAR Preferred 👍 Unavailable 🚫 SAVE

Process For Time-Off Requests

NEW AVAILABILITY PREFERENCE

Advanced Mode Watch a Tutorial

DAY	12A	1A	2A	3A	4P	5P	7P	8P	9P	10P
Sunday	All Day									
Monday	All Day									
Tuesday	All Day									
Wednesday	All Day									
Thursday	All Day									
Friday	All Day									
Saturday	All Day									

CLEAR

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Developers | Found a Bug? | NEED HELP

Request Time-Off

ARE YOU TAKING OFF A PORTION OF THE DAY OR A WHOLE DAY(S)?

All Day Partial Day

TIME-OFF TYPE: Unpaid

START DATE: February 1, 2016

END DATE: February 17, 2016

EMPLOYEE: **Kate Delaney**

MESSAGE:

SEND REQUEST

Process for Changes In

Important Upcoming Date

SEP, MON
7
Store Closed
At Store,
Store Closed for Labor Day
Posted By Kate D. on June 4, 2015


Schedule For Aug 24th - Sep 6th

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
24	25	26	27	28 9a - 5:30p at Store
31 8:45a - 5p at Store	01 8:45a - 5p at Store	02 8:45a - 5p at Store	03 8:45a - 5p at Store	04 8:45a - 5p at Store
11	10	13	15	15

FRI
28

9a - 5:30p
at Store as Sales

LOCATION
210 N Chester Rd, West Chester, PA 19380



Store

NOTES
Sales: Monday-Friday

SWAP SHIFT **DROP SHIFT**

Important Up

SEP, MON
7

Store C
At Store.
Store Close
Posted By Ka

Schedule For

MONDAY

24

31

8:45a - 5p
at Store

Shift Swap



TRADE THIS SHIFT

Friday, August 28, 2015 at 9a - 5:30p at Store

FOR ONE OF THESE SHIFTS

ALL

NONE

LOAD MORE

TUE, AUG 25	8:45a - 5:30p @ Store Nicole W. as Sales	<input type="checkbox"/>	TUE, AUG 25	9a - 5:30p @ Store Erin F. as Sales	<input type="checkbox"/>
TUE, AUG 25	9a - 5:30p @ Store Chris P. as Sales	<input type="checkbox"/>	WED, AUG 26	9a - 5:30p @ Store Nicole W. as Sales	<input type="checkbox"/>
WED, AUG 26	9a - 5:30p @ Store Suzanne R. as Sales	<input type="checkbox"/>	THU, AUG 27	9a - 5:30p @ Store Nicole W. as Sales	<input type="checkbox"/>
FRI, AUG 28	9a - 5:30p @ Store Janet S. as Sales	<input type="checkbox"/>	FRI, AUG 28	9a - 5:30p @ Store Elizabeth E. as Sales	<input type="checkbox"/>

MESSAGE

INITIATE SWAP

When I Work

- Schedules can be viewed anytime, anywhere!
- Managers are able to organize requests and schedule preferences.
- Employees feel more in control of their schedule.
- Can easily refer to past schedules.

Staffing Needs and Priorities

Challenge:

- Unclear staffing needs
- Unclear Staffing Priorities
- Specific employee counts are unclear
- Need to minimize repeat meetings and discussions
- Impossible for a group to understand the big picture



Organizational Chart

The screenshot shows the Gliffy software interface with the following elements:

- Menu Bar:** File, Edit, Share, Help
- Toolbar:** Undo, Redo, Copy, Paste, Text, Shape, Line, Arrow, Hand, Zoom (100%), Grid, and Save
- Search Shapes:** Search Shapes
- Basic Shapes:** A sidebar with various geometric shapes and arrows.
- Organizational Chart:** A grid of boxes representing roles and individuals. The chart is titled "SAF Demo, v3" and includes the following roles and individuals:

General Manager Charles	Marketing Amy	Human Resources Betty	Book Keeper Callie	Creative Director David		
Store 1 Store Manager Eric	Store 2 Store Manager Larry	CRS Manager Rebecca	Wedding and Special Event Sales Yan	Delivery Manager Ben	Buyer & DC Production Ginny	
Lovers Floor Fred	OH Sales Mike	Special Services Sally	Event Sales Zack	Delivery Cathy	Processing Harry	Design Laura
Lovers Floor George	OH Sales Nancy	Special Services Tommy	Project Coordinator Ann	Delivery Doug	Processing John	Design Michelle
Lovers Floor Harold	Designer Olivia	CRS Unus		Delivery Erinie	Processing Kris	Design Nick
Lovers Design Ingrid	Designer Paul	CRS Vickie		Delivery OPEN		Design Penny
Lovers Design OPEN		CRS Will				Design Ralph

Wedding Management

Challenges:

- **TOO MUCH PAPER!**
- **No Backup of Information**
- **Could Not Effectively Track Vendors**

insightly



Calendar for Weddings & Consultations

Maylack Florist

Search all data...

Calendar

Today < > August 2015

Day Week Month

New Event

10	11	12	13	14	15	16
10:30a Kiara Consultation 3p Kelly Go Over	11a Andrea Go Over		11a Jessica Wedding	11a Donna Consultation 11a Emile Consultation 2p Kimberly Wedding	4:30p Jessica Wedding	
17	18	19	20	21	22	23
		4p Amy Go Over Sample	8p Chase Wedding	8a Renee Go Over 10a Cole Go Over 11:00a Gina Consultation 1:00p Jennifer Wedding 2p Jeanne Wedding 2p Kelsey Wedding		
24	25	26	27	28	29	30
Bride Meeting 9:30 11:30a Rachael Consultation 12p Kim Consultation	11a Brittany Consultation 4p Lauren Consultation			10a Anne Phone Consult Go Over 10a Lauren Go Over 1:00p Erin Wedding 2p Kiara Wedding 4p Ashley Consultation 4:30p Daniele Wedding		
31	1	2	3	4	5	6
			2p Angel Wedding 2:30p Ashley Wedding 2:30p Seanna Wedding 2:30p Seanna Wedding	11a Levi Wedding 12p Michele Consultation 2p Carol Ann Wedding 5:00p Lindsay Wedding		

Organizes Opportunities & Projects

The screenshot displays the Matlack Florist CRM interface. At the top, the logo "Matlack Florist" is on the left, and a search bar "Search all data..." is on the right. A dark sidebar on the left contains navigation icons for Home, Tasks, Contacts, Organizations, Leads, Opportunities, Projects (highlighted), Emails, and Reports. The main content area is titled "Projects" and features a search bar, a "Filter" dropdown, and a "New Project" button. Below this, a filter bar indicates "Filtering By Responsible User: Sue DLuigi". A list of five projects is shown, each with a checkbox, a hammer icon, a name, a "Wedding" tag, a status "In Progress", and a progress bar. The projects are: Anne, Devon, Emily, Jennifer, and Seanna. A "Total of 5 records in this list." message is displayed at the bottom of the list. On the far right, a vertical alphabetical index from A to V is visible.

Project Name	Status	Responsible User	Progress
Anne Wedding	In Progress	Sue	Wedding Project
Devon Wedding	In Progress	Sue	Wedding Project
Emily Wedding	In Progress	Sue	Wedding Project
Jennifer Wedding	In Progress	Sue	Wedding Project
Seanna Wedding	In Progress	Sue	Wedding Project

Accurate Record Keeping

The screenshot displays a CRM interface for 'Matlack Florist'. The top navigation bar includes a search field and a 'Private' indicator. The left sidebar contains navigation options: Home, Tasks, Contacts, Organizations, Leads, Opportunities, **Projects**, Emails, and Reports. The main content area shows the details for a project named 'Eleanor Wedding'. The project status is 'IN PROGRESS' and the category is 'Wedding'. The responsible user is 'Deborah' and the link email address is 'kdelaney-P2503461-ANUIAV@mailbox.insight.ly'. The 'WEDDING' section lists details such as the wedding date (Sat Oct 24 2015), time (1:00), designer (Debbie), total cost (\$2173.00), and MAS account number (130893). The 'PIPELINE' section shows two stages: '1 Client Stage 1' and '2 Client Stage 2'. The 'LINKS' section includes an 'Add New Link' field and a list of existing links categorized by type: Contacts (Elinor), Organizations (St Agnes Church Ceremony, Vickers Restaurant Reception), and Opportunities (Eleanor - Wedding Converted Opportunity).

Matlack Florist Search all data... [Private]

Eleanor Wedding [Wedding Project] [Manage Tags]

← [Actions]

About | History | Emails | Notes | Files | Tasks | Events

PROJECT DETAILS

- Project Name: Eleanor Wedding
- Current Status: **IN PROGRESS** [Change]
- Category: **Wedding**
- Responsible User: Deborah
- Link Email Address: kdelaney-P2503461-ANUIAV@mailbox.insight.ly [?]

WEDDING

- Wedding Date: Sat Oct 24 2015
- Wedding Time: 1:00
- Wedding Designer: Debbie
- Total Wedding Cost: \$2173.00
- MAS Account Number: 130893

PIPELINE: Wedding Client

1 Client Stage 1 > 2 Client Stage 2 >

LINKS

Add New Link: [Link this project to...]

- Contacts: Elinor
- Organizations: St Agnes Church Ceremony, Vickers Restaurant Reception
- Opportunities: Eleanor - Wedding Converted Opportunity

Organizes Tasks

The screenshot displays a CRM interface for 'Matlack Florist'. The top navigation bar includes a search field with the text 'Search all data...'. The left sidebar contains navigation icons for Home, Tasks, Contacts, Organizations, Leads, Opportunities, Projects, Emails, and Reports. The main content area is titled 'Eleanor Wedding' and shows a 'Project Tasks' section. The tasks are organized into 'Later Tasks' and 'Completed Tasks'.

Project Tasks

Later Tasks

Date	Status	Priority	Task Description	Assignee	Project
Oct 10 2015	S1	Receive Final Payment	(Deborah)	Eleanor	Wedding
Oct 11 2015	To Do	S1	Final Flower Orders Completed	(Deborah Matlack)	Wedding
Oct 23 2015	To Do	S1	AFTER the Wedding enter Final Wedding Cost & Change Status to COMPLETED	(Deborah)	Wedding
	To Do	S1	Contract Signed after Deposit	(Deborah)	Wedding
	To Do	S1	Followup	(Deborah)	Wedding
	To Do	S1	Confirm Delivery Details	(Deborah)	Wedding
	To Do	S1	Create Photographer Contact & Link to Wedding	(Deborah)	Wedding

Completed Tasks

Date	Status	Priority	Task Description	Assignee	Project
Jul 11 2015	To Do	S1	-Create EVENT for Wedding Date & Time	(Deborah)	Wedding

Vendors Are Linked To

Matlack Florist Search all data... [Search] [Menu]

Home [Home] Tasks [Tasks] Contacts [Contacts] Organizations [Organizations] Leads [Leads] Opportunities [Opportunities] Projects [Projects] Emails [Emails] Reports [Reports]

Mendenhall Inn

Ceremony Venue Manage Tags

← [Edit] Actions ▾

About History Emails Notes Files Tasks Events News

ORGANIZATION DETAILS

Organization Name: **Mendenhall Inn**
Phone: 610-388-1181 Work
Email: dsonsalla@mendenhall inn.com Work
Website: Mendenhallinn.com Work
Work Address: Route 52 Mendenhall, PA 19357 Mendenhall, PA 19357 map
Organization Created: Oct 22 2014
Background: Wedding and reception site

LINKS

Add New Link

Opportunities

- Alexandra Wedding Reception
- Amanda Wedding Ceremony and Reception
- Ashley Wedding Ceremony and Reception
- Christine Wedding Ceremony and Reception Site
- Colleen Wedding Ceremony and Reception
- Courtney Wedding Reception Site
- Kelly Wedding Reception
- Kristin Wedding Reception
- Mary Theresa Wedding Reception
- Mary Wedding Ceremony and Reception site
- Sarah Wedding Ceremony and Reception

Projects

- Alexandra Wedding Reception
- Amanda Wedding
- Christine Wedding Ceremony and Reception Site
- Courtney Wedding Reception Site
- Jess Wedding Ceremony and Reception
- Kelly Wedding Reception
- Kristin Wedding Reception
- Kristin Wedding ceremony and Reception
- Mary Theresa Wedding Reception
- Mary Wedding Ceremony/reception
- Sarah Wedding Ceremony and Reception

Insightly

- Management can view details of weddings at a glance.
- Important follow-through is not being missed.
- Improved relationships with vendors.