

Resource Scheduler Setup Guide

Page 2: Setup

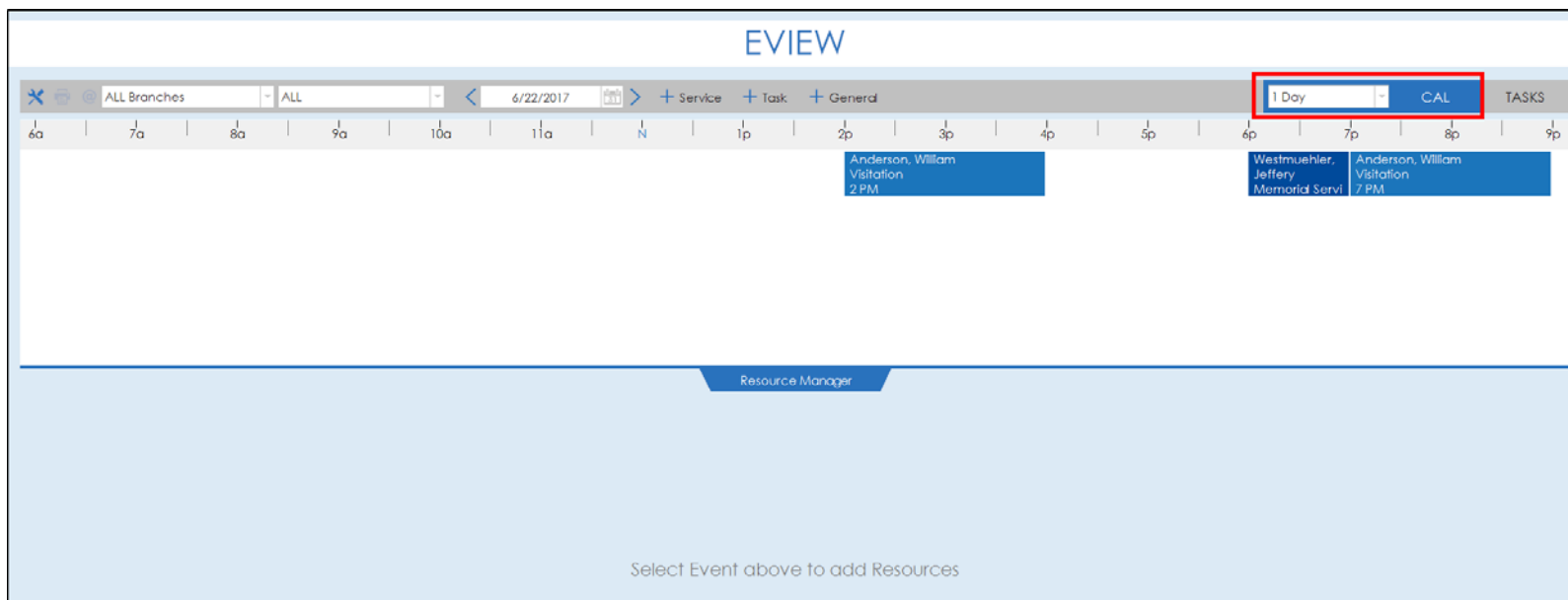
Page 3: Adding/Editing Categories, Staff, & Resources

Page 7: Assigning Resources to Services

Page 9: Notifying Staff of Schedule

Resource Scheduler is a feature that will allow you to manage your staff, vehicles, rooms, and other resources that will be used for different scheduled services.

The Resource Scheduler can be viewed in the E-View section using the 1 Day Calendar view. Before being able to schedule anything, some customized setup will need to be completed.



Go to **Settings** and click on the **Resource Setup** tab.

SETTINGS

Preferences Funeral Home Info Funeral Home Defaults Staff Corporation Info Client Type Settings Bar Code Setup Tasks **Resource Setup**

CATEGORY SETUP

Categories

- ☐ Arrangement Rooms (4)
- ☐ Assistants (7)
- ☐ Audio Visual (4)
- ☐ Drivers (8)
- ☐ Embalmer (6)
- ☐ Florist (5)
- ☐ Funeral Director (6)
- ☐ Greeters (6)
- ☐ Limos (3)
- ☐ Non-Staff People (0)
- ☐ Vehicles (6)
- ☐ Viewing Rooms (4)

RESOURCE SETUP

+ Staff Resource + General Resource

Add a new resource above to enable this section.

Add a new resource above to enable this section.

Resource

This section will allow you to see existing Resource Categories (1), as well as add new ones. You may add as many categories as you would like. You may then assign staff (2) to certain categories, or use resources (3) for things such as vehicles, rooms, or special equipment.

Adding New Categories, Staff & Resources

Categories **1** CATEGORY SETUP

EDIT CATEGORY LIST

Name	Staff
Arrangement Rooms	<input type="checkbox"/>
Assistants	<input checked="" type="checkbox"/>
Audio Visual	<input type="checkbox"/>
Drivers	<input checked="" type="checkbox"/>
Embalmer	<input checked="" type="checkbox"/>
Florist	<input checked="" type="checkbox"/>
Funeral Director	<input checked="" type="checkbox"/>
Greeters	<input checked="" type="checkbox"/>
Limos	<input type="checkbox"/>
Non-Staff People	<input checked="" type="checkbox"/>
Vehicles	<input type="checkbox"/>

Category: Arrangement Rooms **3**

Icon: **Staff Type:** ☐

2 New Save Delete

To add or edit a Category, click on the Edit Categories button (1) next to the Category Setup title. Click New (2) to add a new category or select an existing one from the list. Enter the Category Name (3), select an icon, and check *Staff Type* if this category will include staff members. Save when completed. The category will now display in the list.

Staff Resource — RESOURCE SETUP

CHOOSE STAFF FOR RESOURCE

Best, Adam D

Resource

To add staff to a Resource click the Add Staff Resource button. Select the staff member you would like to assign and click the Save Resource button.

Best, Adam D

Category Assignments

- ☒ Assistants
- ☒ Drivers
- ☒ Embalmer
- ☐ Florist
- ☒ Funeral Director
- ☒ Greeters
- ☐ Non-Staff People

Funeral Homes

- ☒ Simons
- ☒ Thompson
- ☐ Linbrook
- ☐ Graham

Resource

A list of available staff resources will appear. Select the categories that the staff member should be a part of, as well as the branches they work from. Click the Save Resource button to save.

General Resource — RESOURCE SETUP

ENTER A NAME FOR RESOURCE

Resource

To add a General Resource click the Add General Resource button. Type the name of the resource you would like to add (vehicle, room, etc) and click the Save Resource button.

Lincoln Hearse

Category Assignments

- ☐ Arrangement Rooms
- ☐ Audio Visual
- ☐ Limos
- ☒ Vehicles
- ☐ Viewing Rooms

Funeral Homes

- ☒ Simons
- ☒ Thompson
- ☒ Linbrook
- ☒ Graham

Resource

A list of available resources will appear. Select the categories that the resource should be a part of, as well as the branches it is available to. Click the Save Resource button to save.

CATEGORY SETUP

Categories

Funeral Director (6)

Greeters (6)

Adam D Best

Kyle Bliss

Carol Kirk

Scott Robert Simons

Luke Ziegler

Alyssa Bouvy

Limos (3)

Non-Staff People (0)

Vehicles (6)

Maserati Hearse

Cadillac Hearse

Lincoln Hearse

Limo Black Stretch

Limo 8 Passenger

Limo 12 Passenger

Viewing Rooms (4)

Once saved, the staff and general resources will appear under the assigned categories.

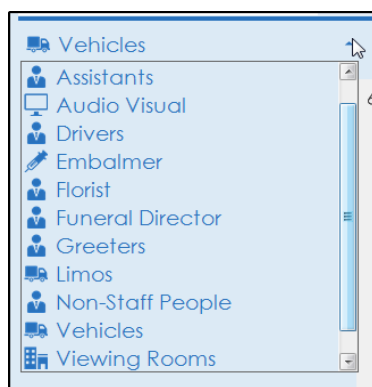
6

Assigning Resources to Services

Once your resources are complete, you can assign them to scheduled services in E-View.

The screenshot shows the E-View interface. At the top, there's a navigation bar with 'ALL Branches', 'ALL', and a date '6/22/2017'. Below this is a timeline from 6a to 9p. A service 'Anderson, William Visitation 2 PM' is highlighted with a red box and a red arrow pointing to it. Below the timeline, a dropdown menu (1) is open, showing 'Arrangement Rooms'. To the right, a 'Resource Manager' section shows a list of resources: 'Ashworth Room', 'Hasbrouck Room', 'Vanderbilt Room', and 'Madison Room'. A red box (3) highlights the 'Ashworth Room' resource, which is assigned to the 'Anderson, William Visitation' service. On the right side, a detailed view of the service is shown, including the name 'William Anderson', location 'Simons Funeral Home', date '6/22/2017', and time '2:00 PM - 4:00 PM'. Below this, a list of resources is shown, including 'Arrangement Rooms', 'Ashworth Room', 'Assistants', 'Audio Visual', 'E-Registerbook 2', 'Greeters', 'Viewing Rooms', and 'Viewing Room East'.

1. Choose the resource you would like to assign from the dropdown
2. Select the Service that needs the resource scheduled for by clicking on it
3. Use the timeline to select the available time and resource for the service



Each Resource will need to be scheduled individually. Use the dropdown to select each.



A green exclamation point will appear next to the staff if they are scheduled at the same time for multiple services to alert of a possible conflict.












A red exclamation point will appear next to a resource, such as a room, if it is double booked during the same time slots to alert of the conflict.




As resources are scheduled a summary will build in the right side of the window showing what all has been assigned.

William Anderson

Simons Funeral Home
Visitation • 6/22/2017
2:00 PM - 4:00 PM

-  Arrangement Rooms
 - Ashworth Room 
-  Assistants
 - Simons, J.  
-  Audio Visual
 - E-RegisterBook 2 
-  Viewing Rooms
 - Viewing Room East 

If more than 1 service is scheduled at a time, it will show the other available resources during those times.

ALL Branches

ALL

< 6/22/2017 >

+ Service


+ Task

+ General

6a | 7a | 8a | 9a | 10a | 11a | N | 1p | 2p | 3p | 4p

Walters, Jane
Funeral
Ceremony

Anderson, William
Visitation
2 PM

 Arrangement Rooms

Resource Manager

6a | 7a | 8a | 9a | 10a | 11a | N | 1p | 2p | 3p | 4p | 5p | 6p

Ashworth Room

Hasbrouck Room

Vanderbilt Room

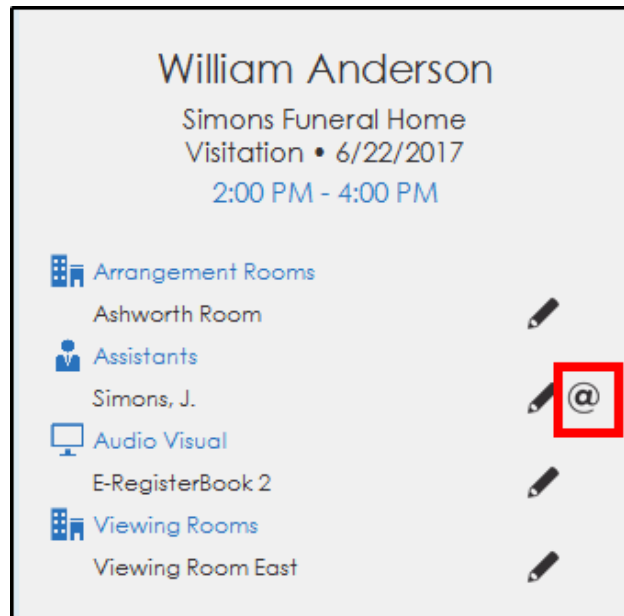
Madison Room

Anderson, William
Visitation










8

Notifying Staff of Schedule

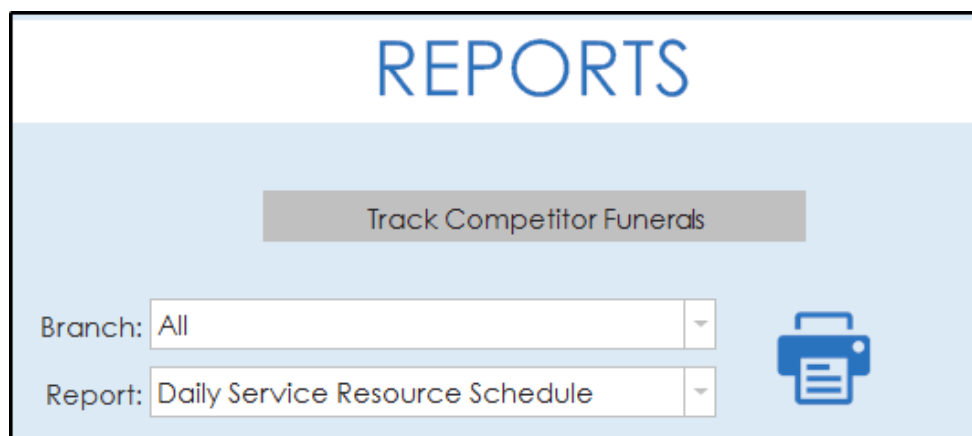
You will be able to notify your staff of services they are scheduled on a few different ways.



William Anderson
Simons Funeral Home
Visitation • 6/22/2017
2:00 PM - 4:00 PM

-  Arrangement Rooms
 - Ashworth Room 
-  Assistants
 - Simons, J.  
-  Audio Visual
 - E-RegisterBook 2 
-  Viewing Rooms
 - Viewing Room East 

One way is to email them a copy of the service information by clicking on the @ symbol in the summary section of the service they are scheduled for. This will work for all Outlook users. Make sure that the staff member has an email address entered in Settings. You may also add a specific note by clicking on the pencil icon.




REPORTS

Track Competitor Funerals

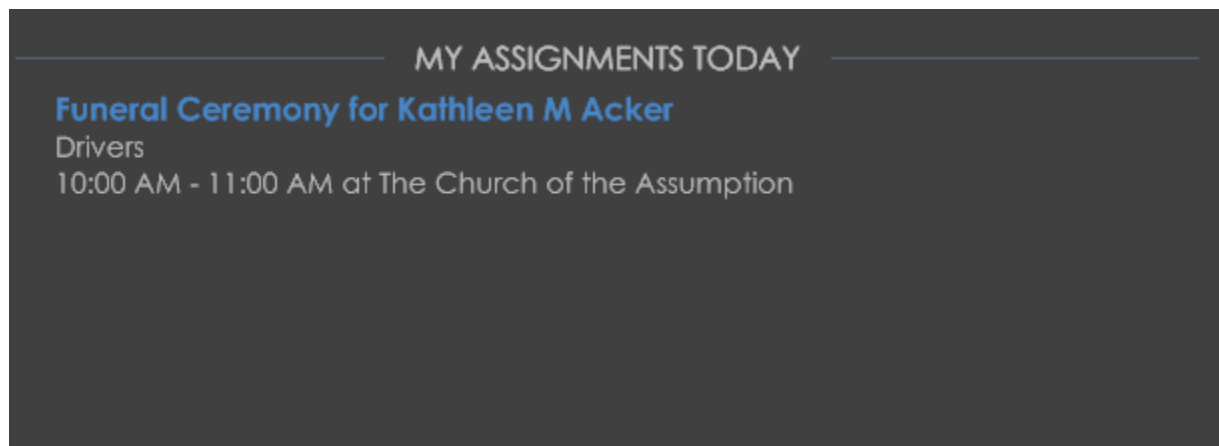
Branch: All

Report: Daily Service Resource Schedule



Another way is to print the Daily Service Resource Schedule and give to your staff.

SRS can set this report up to be automatically emailed to your staff at a certain time of day, each day for a small setup fee. If you are interested in this ability, please contact your account representative.



Lastly, your staff will see their assignments for the day on the Dashboard when they start the program. These assignments will show in the bottom left corner under My Assignments Today.