

Restaurant365

New Scheduling Experience

Customers who are currently using R365's Scheduling Module and have not upgraded to the New Scheduling Experience are in for a treat! A free upgrade to the New Scheduling Experience and R365 App! To ensure that this process is as seamless as possible, please complete the following checklist so that you, your Restaurant Managers, and your Employees are prepared for the New Scheduling Experience.

Migration Checklist

- Notify Staff.** Notify your Managers and Schedulers about the upcoming change to the Scheduling platform.
- Prepare Employees.** For detailed information to share with Employees about this change, provide them with this [Employee Updates](#) checklist.
- Download the R365 Red App.** Ensure that both Employees and Managers know to download the new [R365 Red App](#). This App provides Employees and Managers access to Scheduling functions while the [R365 Classic App](#) is used for other Operations and Accounting features, such as Stock Counts, Manager Log, Documents to Process, and more. To download the R365 Red App, complete the following steps:
 1. Open your Camera App on your phone
 2. Hold your phone steady over the QR Code listed here
 3. Tap the notification that drops down from the Status Bar on your phone
 4. Download the R365 Red App!
- Answer Outstanding Requests.** Respond to all open requests on the Requests page prior to migration. Any Employee Requests that are submitted after migration will now be displayed in the all new [Manager Queue](#).
- Review User Roles.** Ensure that necessary Users have the correct User roles. The following are Scheduling specific User Roles:
 - *Scheduler* - This Primary Role allows Users to create Schedules without having access to view transactions or Employee pay rates. This role is great for Users who need access to the Scheduler to make schedules without access to pay information. Accounting and Restaurant Managers have this function as part of their Primary Roles.

Google Play



App Store



- *Schedule Approval* - This Secondary Role is required to publish shifts and schedules. Users who have the Primary Roles of Restaurant Manager or Scheduler will need this additional role to publish shifts and schedules while Accounting Managers will be able to publish without this role.

- ☐ **Prepare Two Weeks of Schedules.** Create and publish two weeks worth of Schedules out from the date of migration in your current Scheduling Module. Doing so can provide a smooth transition into the New Scheduling Experience without feeling rushed after the new migration. All Templates and Prior Week Schedules will migrate to the New Scheduling Experience, so you don't need to worry about losing any Scheduling history.

- ☐ **Print Schedules.** Print your newly created Schedules. While your Schedules will be transferred over to the new platform, it is highly recommended to print your Schedules for precautionary measures.

- ☐ **Select Department Managers.** Set up your Department Managers before the transition. When setting up Departments in the New Scheduling Experience, you will need to select a Manager to oversee each Department, which will group Employees together for Scheduling and Goal Setting purposes. To prepare, add the Restaurant Manager User role to each Manager's User record. This will create a login that Managers can use to log in to the R365 Red App to Approve and Deny requests and view Schedules. This will also include them on the listing for 'Managers' when setting up Departments in the new platform.
 - **Note:** Managers who already have an R365 account will continue to use it to access the browser and the R365 Classic App.

- ☐ **Learn about the New Scheduling Experience!** Review the following training guides about the New Scheduling Experience:
 - [New Scheduling Demo - Desktop](#)
 - [New Scheduling Demo - Mobile App](#)
 - [New Scheduling Training Articles](#)
 - [New Scheduling: Employee Training Articles](#)