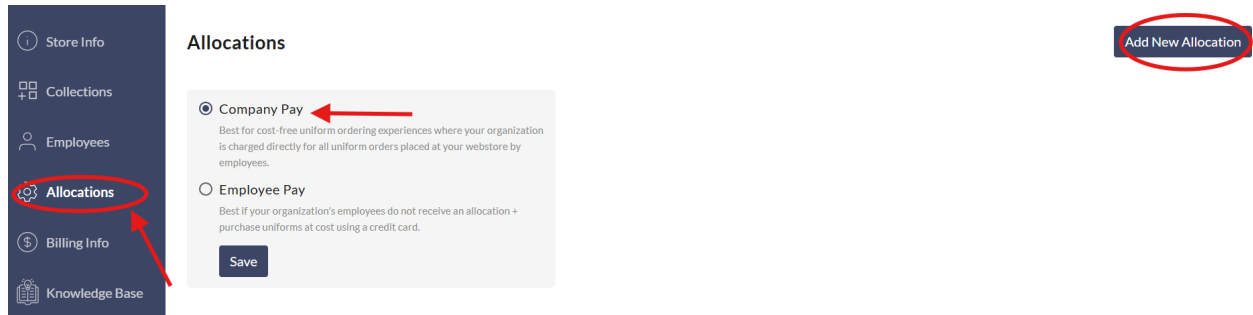


How to Create a New Hire Set Allotment

For this specific example, we will be creating a New Hire Dollar Set Allotment for all staff at all of the organizations locations.

1. Navigate to the Allocations tab and at the top right corner click the Add New Allocation button.



2. Name the Allocation.
 - a. You will want to name the allocation based on which employees receive this allocation. This is usually determined based on Location, Department, Employment Type.
3. Choose an Employee Type(s).
 - a. Choose all Employment Types that apply.
 - a. If this is exclusively for Full Time employees, select Full Time only.
 - b. If this is for all employment types, select all.
4. Choose a Department(s)
 - a. Choose all Departments that apply.
 - a. If this is exclusive to one Department, Nurses for example, select Nurses only.
 - b. If this is for all departments, select all.
5. Choose a Location(s)
 - a. Choose all Locations that apply. Select Next.
 - a. If this is exclusive to one Location, select that location only.
 - b. If this is for all Locations, select all.
 - c. Select Next

Allocation Name

Select which employees will be offered this Product Set Allotment. Choose all that apply.

Employee Type☒ Full Time☒ Part Time☒ Per Diem**Departments**☐ Medical Assistant☐ Provider☐ Medical Receptionist☐ Call Center☐ Billing☐ Leadership☐ Research☐ Asthetics☐ Hidden**Locations**☒ Dallas - Park Lane☒ Allen☒ Aubrey☒ Dallas Research Row☒ Frisco☒ Gainesville☒ Granbury☒ Melissa☒ Rockwall**Custom**

6. Choose the Allocation Type “Set Allotment”

[Back to Allocations](#)

Edit Allocation

Select Allocation Type:

☐ Dollar Voucher

Provides employees with a set dollar amount to apply towards their order.
The company is billed with a monthly invoice. Employees can pay for any overages.

☒ Set Allotment

Best for providing employees with a specific number of items or uniform sets.
The company is billed with a monthly invoice and employees can pay for additional items.

7. Configure the number of uniform items for this New Hire Set Allotment. This can be done in one of three ways:
- Total Quantity- The total number of items that an employee can order in any Category and Product Type within their specific collection(s).

Select Allocation Type:

☐ Dollar Voucher

Provides employees with a set dollar amount to apply towards their order.
The company is billed with a monthly invoice. Employees can pay for any overages.

☒ Set Allotment

Best for providing employees with a specific number of items or uniform sets.
The company is billed with a monthly invoice and employees can pay for additional items.

How much will be allowed?

Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

4

☐ Per-category quantity

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Next

- *Per Category - Specific number of units an employee can only use in a specific product category
 - If an organization only wants its employees to use their set allotment on Scrub Wear, by turning on the per category toggle, this will only allow the



specific numerical value entered to be used for product types within Scrub Wear only. *This will still reflect as the Total Budget.*

How much will be allowed?

Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

4.00

☒ Per-category quantity

Scrub Wear

7 Product Types

4

▼ select specific products

☐ Per-type quantity

Casual Wear

6 Product Types

▼ select specific products

☐ Per-type quantity

Business Wear

3 Product Types

▼ select specific products

☐ Per-type quantity

- c. *Per Type - Number of units that an employee can only spend on a specific product type within a product category.
 - a. If an organization only wants its employees to use their set allotment on specific Product Type within a chosen Category, by turning on the Per-Type toggle this will allow the specific numerical value entered to be used within the chosen Categories and specific Product Type. Click Next.

How much will be allowed?

Enter a quantity for these employee vouchers. Specify certain product types or category by turning on the toggle below:

Total quantity:

☒ Per-category quantity

Scrub Wear	
7 Product Types	
<input type="text" value="4.00"/>	
^ select specific products	
<input checked="" type="checkbox"/> Per-type quantity	
<input checked="" type="checkbox"/> Tops	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Bottoms	<input type="text" value="2"/>
<input type="checkbox"/> Jackets	
<input type="checkbox"/> Lab Coats	
<input type="checkbox"/> Underscrub Tees	
<input type="checkbox"/> Sets and Dresses	
<input type="checkbox"/> Headwear	

8. As this is a New Hire Dollar Voucher, the frequency of this allocation is once per employee. Select “Once only, for New-hire Employees”. Select Next.
- Any Provider that is flagged as a new hire will automatically qualify for this allocation

[Back to Allocations](#)

Edit Allocation

What is the frequency for issuing this Allocation?

☐ One or more times, for Standard Employees

These can start on any date you choose, and can be optionally setup for renewal with a selected frequency

☒ Once only, for New-hire Employees

These are one-time allocations created for new hire employees, can include an optional wait period, and do not renew.

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9. You may set up a Wait Period which is a period of time after the hire date that an employee has to wait until they are issued their allocation. If you want your new hires to receive their allocation right away, leave this section blank.
- If there is a 90 day waiting period that means an employee who is considered a new hire has to wait 90 days on the job to be issued an allocation. The wait period can be as long or short as your organization needs. Most common is anywhere from 30-90 days.

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Edit Allocation

Program is based on the Employee Hire Date

All employees with the "New Hire" flag will qualify for this program.

Wait Period

If you would like this program to be available after an employee's start date, enter the number of days to wait here.

10. You may set up a Usage Period which is a period of time the employee has to initially redeem and use their allocation.
- If you set the usage period for 90 days, employees must use their allocation within 90 days of the allocation being issued. Any remaining dollars will automatically be removed from their account after 90 days.
 - If you do not want your new hires to have a usage period, leave this section blank. They will then have until a Recurring Allocation becomes available.

Edit Allocation

Program is based on the Employee Hire Date

All employees with the "New Hire" flag will qualify for this program.

Wait Period

If you would like this program to be available after an employee's start date, enter the number of days to wait here.

Usage Period

If you would like vouchers to be used within a certain period, enter the number of days vouchers are valid for.

Your program will start 30 days after the hire date of new employees and remain available for 180 days.

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11. Click Next. This will direct you to the Allocations Tab homepage as you have successfully created your New Hire Dollar Voucher Allocation.

Using your New Hire Allocation

When adding a new employee to your Uniform Store, in order for them to qualify for this new hire specific allocation, the field "new hire" will need to be set to "Yes". If a new hire waiting period is in place, the hire date will also be required as that is used to calculate the new hire waiting period and issue the allocation at that time.

Hire Date



New Hire

AddCancel

If set up correctly, you will see a preview of the allocation to be assigned on the right hand allocations window including any new hire allocation wait period that is in place.

[Back to Employees](#)

Add Employee

First Name

Last Name

Email



User Type



Locations

Allocations

Dollar Voucher

\$250.00

Expected Issue Date: 2025-10-30

NOTE: This allocation is for a new hire. The allocation will not be applied until 30 days after 2025-09-30. (Expected issue date: 2025-10-30)

One Time Reward

Reward

No Rewards Issued

