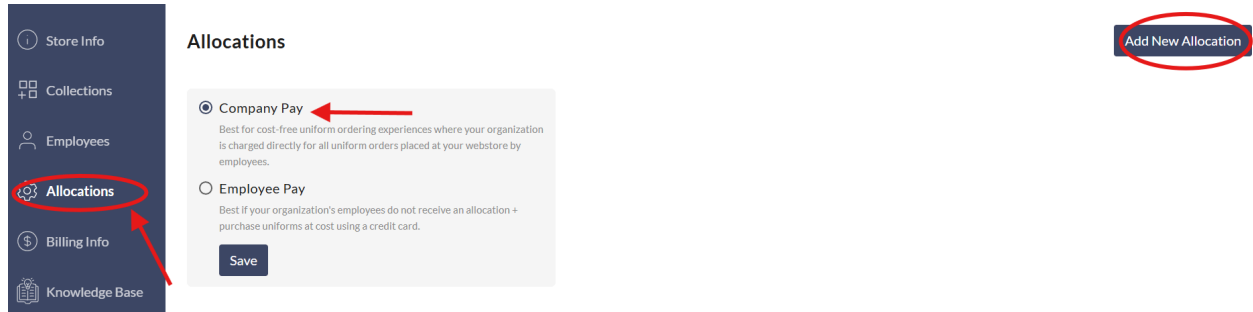




## How to Create a Recurring Set Allotment

*For this specific example, we will be creating a Recurring Set Allotment for all staff for an organization that has one location.*

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

Annual Allocation

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

#### Employee Type

Full Time

Part Time

#### Departments

Clinical

Admin

#### Locations

Beacon Hill  
Dental

#### Custom

Cancel

Next

## 6. Choose the Allocation Type "Set Allotment"

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### 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 Recurring Set Allotment. This can be done in one of three ways:
  - a. Total Quantity - The total number of items that an employee can order in any Category and Product Type within their specific collection(s).

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## 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.

### 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:

6

☐ Per-category quantity

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- b. \*Per Category - Specific number of units an employee can only use in a specific product category
    - a. 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:

☒ Per-category quantity

Scrub Wear  
7 Product Types

▼ 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 - Dollars 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

^ select specific products ☒ Per-type quantity

<input checked="" type="checkbox"/> Tops	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Bottoms	<input type="text" value="2"/>
<input checked="" type="checkbox"/> Jackets	<input type="text" value="2"/>
<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 Recurring Set Allotment, the frequency of this allocation can be customized. Select “One or more times, for Standard Employees”. Select Next.
- a. These can start on any date you choose, and can be optionally set up for renewal with a selected frequency. Most organizations will set this up based on the date the program started or employee start date.

## 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. Decide Program Start Date. There are two options here:
- a. Hire Date: If you would like allocations to be sent to employees based on their individual hire/anniversary date, you will want to toggle on “Always defer to Employee Start Date”. For example, if an employee’s hire date is 6/30/2025, then they will not receive an allocation until that day hits. If another employee's hire date is 10/1/2025, they will receive their allocation then. This Recurring Set Allotment will then automatically re-issue depending on the renewal cycle you decide in the next step.

## Frequency & Expiration

### Program Start Date

Specify the start date of your program. You can also defer to the employee's hire date if preferred.

Always defer to Employee Start Date ☒

06/01/2024



Employees who join after this date remain eligible while program is active



- b. \*Set Date: If you would like all staff to receive their Recurring Set Allotments on the same day, you will want to type in the desired date here. This will mean that all staff, no matter their hire date, will receive this allocation on the same day and will continue to receive it based on the renewal cycle you decide in the next step.
  - a. \*When using a Set Date Frequency, it is important to think about any New Hire specific allocations you provide. If you have New Hire specific allocation(s), you will want to make sure the checkbox under the Set Date window is unselected. This will ensure that no one employee can double dip and receive two allocations within the same renewal cycle.
  - b. \*If you do not offer specific New Hire allocations, you will want to select the checkbox under the Set Date window. This will allow employees that are added to Uniform Stores after the Set Date will receive an allocation for the current renewal cycle.

### Frequency & Expiration

#### Program Start Date

Specify the start date of your program. You can also defer to the employee's hire date if preferred.

Always defer to Employee Start Date ☐

06/01/2024



Employees who join after this date remain eligible while program is active

10. Decide Renewal Cycle. This is a field that allows you to determine if and when the allocation will automatically renew. There are five main renewal cycles:

- a. Auto-renew Annually - Hire Date based allocations will automatically issue on their hire date, and then their anniversary date every year thereafter. Set Date based allocations will automatically issue on the date entered and on that date every year thereafter.
- b. Auto-renew Semi-annually - Hire Date based allocations will automatically issue on employees hire date and then every six months thereafter. Set Date based allocations will automatically issue on the date entered and every six months thereafter.



- c. Auto-renew Quarterly - Hire date based allocations will automatically issue on the employee's hire date and then the equivalent date every quarter thereafter. Set Date based allocations will automatically issue on the decided date and the equivalent date every quarter thereafter.
- d. Custom auto-renewal - With this renewal cycle option, the frequency is up to you. You can set it to automatically issue every 3 months, every other year, etc.

#### Renewal Cycle

If you would like vouchers to renew automatically with a certain frequency, specify the frequency here. At the end of each cycle, we'll auto-renew new voucher codes.

- ☒ Auto-renew Annually
- ☐ Auto-renew Semi-annually
- ☐ Auto-renew Quarterly
- ☐ Custom auto-renewal
- ☐ Does not auto-renew

11. Determine Usage Period. This limits how long the allocation is valid for eligible employees. This is not a required field and if left blank, will default to the appropriate expiration date based on the decided renewal cycle. If you would like the voucher to be used within a certain period, enter the number of days the voucher should be valid for.

#### 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 on Sat Jun 01 2024 and employees will have 365 days to use their uniform voucher. After one year, employees will automatically be issued new vouchers, with the next allocation starting on Sun Jun 01 2025.

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12. Click Next. This will direct you to the Allocations Tab homepage as you have successfully created a Recurring Set Allotment Allocation.