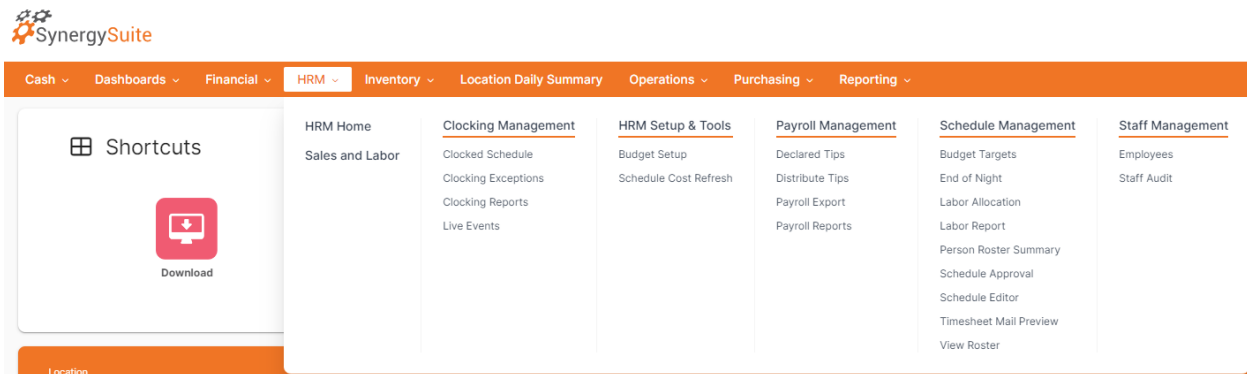


Budgeting and Labor Forecasting happens in 3 spots in SynergySuite, and it is important to do all three in the correct order to accurately report labor totals & forecasting. The three spots are:

- 1) Monthly Labor Budget (found under HRM, Budget Targets)**
- 2) Sales Forecast/Budget (Found under HRM, Budget Setup)**
- 3) In Scheduled Editor (this is the weekly labor you are used to adjusting)**

1. To Schedule the Monthly Labor Budget:



Once you click in, you will see it default to the current month and it defaults to 15% labor budget with the sales target based on last year's sales numbers. These should be updated based on your budget given to you for a monthly period. We recommend this is completed before the month begins.

Date Range	Last Year	Adjustment	Net Sales Target	Labor %	Target Labor	Status
Jan 1, 2024 - Jan 7, 2024	29,668.70	No Change	29,668.7	15.00	4,450.31	No Change
Jan 8, 2024 - Jan 14, 2024	26,377.24	No Change	26,377.24	15.00	3,956.59	No Change
Jan 15, 2024 - Jan 21, 2024	25,215.00	Manual	25,215	15.00	3,782.25	Save Required
Jan 22, 2024 - Jan 28, 2024	23,887.21	No Change	23,887.21	15.00	3,583.08	Save Required
Jan 29, 2024 - Feb 4, 2024	25,068.79	No Change	25,068.79	15.00	3,760.32	Save Required

[Save](#)

To adjust under the adjustment column using the drop down box, choose manual. This will allow you to adjust both Net Sales Target and the Labor % to be what your budget for your location is. Once completed, hit the blue save required link to the side, as well as the blue save button at the bottom.

Note: You can set up the entire year if you have that budget. We at least recommend one month or one quarter at a time.

2. Budget Setup:

- This will show on the labor forecast in the schedule editor

This shows the weekly labor budget. Every day should match and should be the weekly total budget you have. It is recommend to leave the settings to net sales in calculation and leaving the average payrate box checked. Once complete, hit save. If you don't hit save, your schedule will not show a forecast labor.

Settings

Net Sales in Calculation v

Hourly Rate

Calculate average payrates
 Patron calculations

Default

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Default Labor percentage	23.10	23.10	23.10	23.10	23.10	23.10	23.10

Save

This is the number that will show up on the schedule editor labor forecast page. This is important so that if you adjust your goals to be different on different days, you will know your total target labor.

Total Week Labor %		Staff Pay Rate										(i)	
24.46%		10.00											
	31.8 F Mon, 15 Jan	31.4 F Tue, 16 Jan	29.6 F Wed, 17 Jan	32.8 F Thu, 18 Jan	31.6 F Fri, 19 Jan	32.2 F Sat, 20 Jan	23.6 F Sun, 21 Jan			Total	Target Labor		
Set Expected Labor %	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	21.00%			24.46%	15.00%		
Forecast Gross	1,929.70	2,325.38	2,503.32	2,187.05	3,446.67	4,033.41	2,551.30			8,976.83	0.00		
Forecast Net	1,837.96	2,137.84	2,338.90	2,058.27	3,255.37	3,779.24	2,406.78			17,814.36	25,909.57		
Forecast Labor	459.49	534.46	584.73	514.57	813.84	944.81	505.42			4,357.32	3,886.44		
Staff Hours Allocation	45.95	53.45	58.47	51.46	81.38	94.48	50.54			435.73			

Cancel
Save

3. Sales Forecast:

This is accomplished by clicking on the Financial Tab then choosing Sales Forecast. Choose the correct date at the top right side (using the arrows) and it will bring down the correct week.

Date	Net Sales Base	Weather Forecast	Weather Adjustment %	User Adjustment %	Forecast Net	Forecast Gross	Notes
Mon - Jan 8, 2024	2,143.93	☁	0%	5	2,251.12	2,389.40	
Tue - Jan 9, 2024	2,735.95	☀	0%	-20	2,188.76	2,291.13	
Wed - Jan 10, 2024	2,635.45	☀	0%	-20	2,108.36	2,250.59	
Thu - Jan 11, 2024	2,158.89	☁	0%	0	2,158.89	2,287.10	
Fri - Jan 12, 2024	3,964.55	☀	0%	-20	3,171.64	3,342.47	
Sat - Jan 13, 2024	4,614.77	☁	0%	0	4,614.77	4,886.32	
Sun - Jan 14, 2024	3,165.43	☀	0%	0	3,165.43	3,344.56	
Totals					19,658.97	20,791.57	

This is where you can adjust the forecast. It is adjusted by percentage and not dollar amount. We have created an excel sheet to help you: [Weekly Forecast Tool](#)

Once you have created this forecast. When you are in the schedule editor it is important to go to “more actions” and “labor forecast” to confirm and hit save.

	☁ 31.8 F Mon, 15 Jan	* 31.4 F Tue, 16 Jan	* 29.6 F Wed, 17 Jan	* 32.8 F Thu, 18 Jan	☁ 31.6 F Fri, 19 Jan	* 32.2 F Sat, 20 Jan	* 23.6 F Sun, 21 Jan	Totals	Target Labor
Total Week Labor %	24.46%								15.00%
Staff Pay Rate	10.00								
Set Expected Labor %	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	21.00%	24.46%	15.00%
Forecast Gross	1,929.70	2,325.38	2,503.32	2,187.05	3,446.67	4,033.41	2,551.30	18,976.83	0.00
Forecast Net	1,837.96	2,137.84	2,338.90	2,058.27	3,255.37	3,779.24	2,406.78	17,814.36	25,909.57
Forecast Labor	459.49	534.46	584.73	514.57	813.84	944.81	505.42	4,357.32	3,886.44
Staff Hours Allocation	45.95	53.45	58.47	51.46	81.38	94.48	50.54	435.73	

This will pull the forecasted amounts down to the bottom of the schedule, where you will be able to compare the schedule (top row once filled in) to the forecast labor row. The forecast row as you see below will adjust for different hours and dollar amounts if you change the labor to be different each day. If you do not, what you will see will be like the 2nd picture.



0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
0:00 Hrs	0:00 Hrs	0:00 Hrs	0:00 Hrs	0:00 Hrs	0:00 Hrs	0:00 Hrs	0:00 Hrs
Forecast Hours Variance							
-435:43 Hrs	-45:57 Hrs	-53:27 Hrs	-58:28 Hrs	-51:27 Hrs	-81:22 Hrs	-94:28 Hrs	-50:32 Hrs
Forecast Sales							
\$17,814.36	\$1,837.96	\$2,137.84	\$2,338.90	\$2,058.27	\$3,255.37	\$3,779.24	\$2,406.78
Actual Sales							
\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Forecast Labor							
\$4,357.32	25.00% \$459.49	25.00% \$534.46	25.00% \$584.73	25.00% \$514.57	25.00% \$813.84	25.00% \$944.81	21.00% \$505.42
24.50%	45:57 Hrs	53:27 Hrs	58:28 Hrs	51:27 Hrs	81:22 Hrs	94:28 Hrs	50:32 Hrs

In this 2nd picture you see the same labor goal every day, and in the top row you can see if you meet that goal daily or not and can compare the two.

23.79% \$9,104.21 560:14 Hrs	31.11% \$956.77 58:38 Hrs	22.79% \$819.83 50:07 Hrs	19.68% \$969.30 64:14 Hrs	30.67% \$1,225.97 73:30 Hrs	23.48% \$1,648.51 95:30 Hrs	20.34% \$1,706.86 113:00 Hrs	24.49% \$1,776.97 105:15 Hrs
Forecast Hours Variance							
-27:11 Hrs	10:03 Hrs	-8:30 Hrs	0:12 Hrs	11:06 Hrs	-14:04 Hrs	-17:59 Hrs	-7:59 Hrs
Forecast Sales							
\$37,635.47	\$3,112.27	\$3,756.17	\$4,101.69	\$3,997.57	\$7,020.71	\$8,392.13	\$7,254.93
Actual Sales							
\$11,598.33	\$3,075.37	\$3,596.69	\$4,926.27	\$0.00	\$0.00	\$0.00	\$0.00
Forecast Labor							
\$8,881.98	23.60% \$734.50	23.60% \$886.46	23.60% \$968.00	23.60% \$943.43	23.60% \$1,656.89	23.60% \$1,980.54	23.60% \$1,712.16
23.60%	48:34 Hrs	58:37 Hrs	64:01 Hrs	62:23 Hrs	109:34 Hrs	130:59 Hrs	113:14 Hrs

Note: The trend behind the forecast is 6 weeks