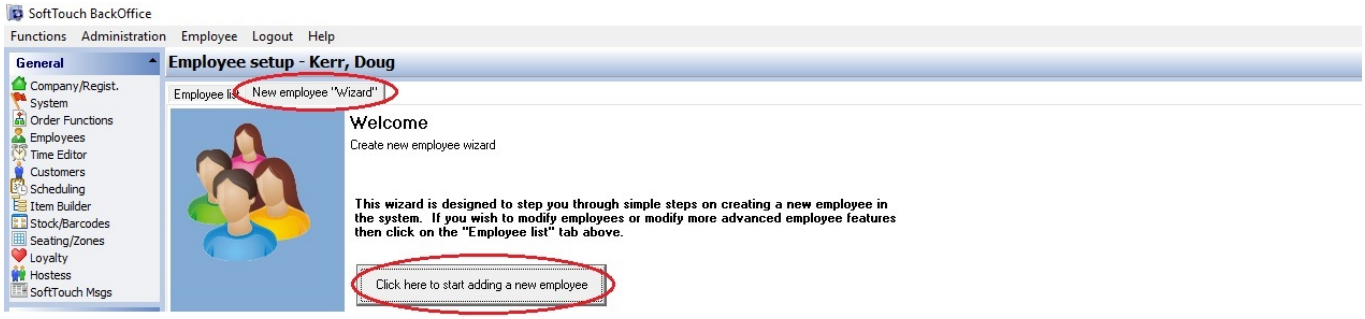
# Adding Employees

To add an employee
Always use the New Employee Wizard (Top Tab)
**a gray check means unchecked




1. First and Last name only – Next button
2. skip page 2 – Next button
3. For the Global System ID use first name and last initial - on this screen if adding a manager, make sure Leave Cashout Money Under Original Employee is checked black - Hit Next button
4. **Set swipe id** (4 digit number they will use to login and place order) and register fingerprint if using – Next button
5. **Job Description** - pick job here **Security Group** - match the job unless kitchen/bus/food runner etc - then use Employee or Clock In/Out Only for the Security Group - Put in **Wage** as hourly – Next button

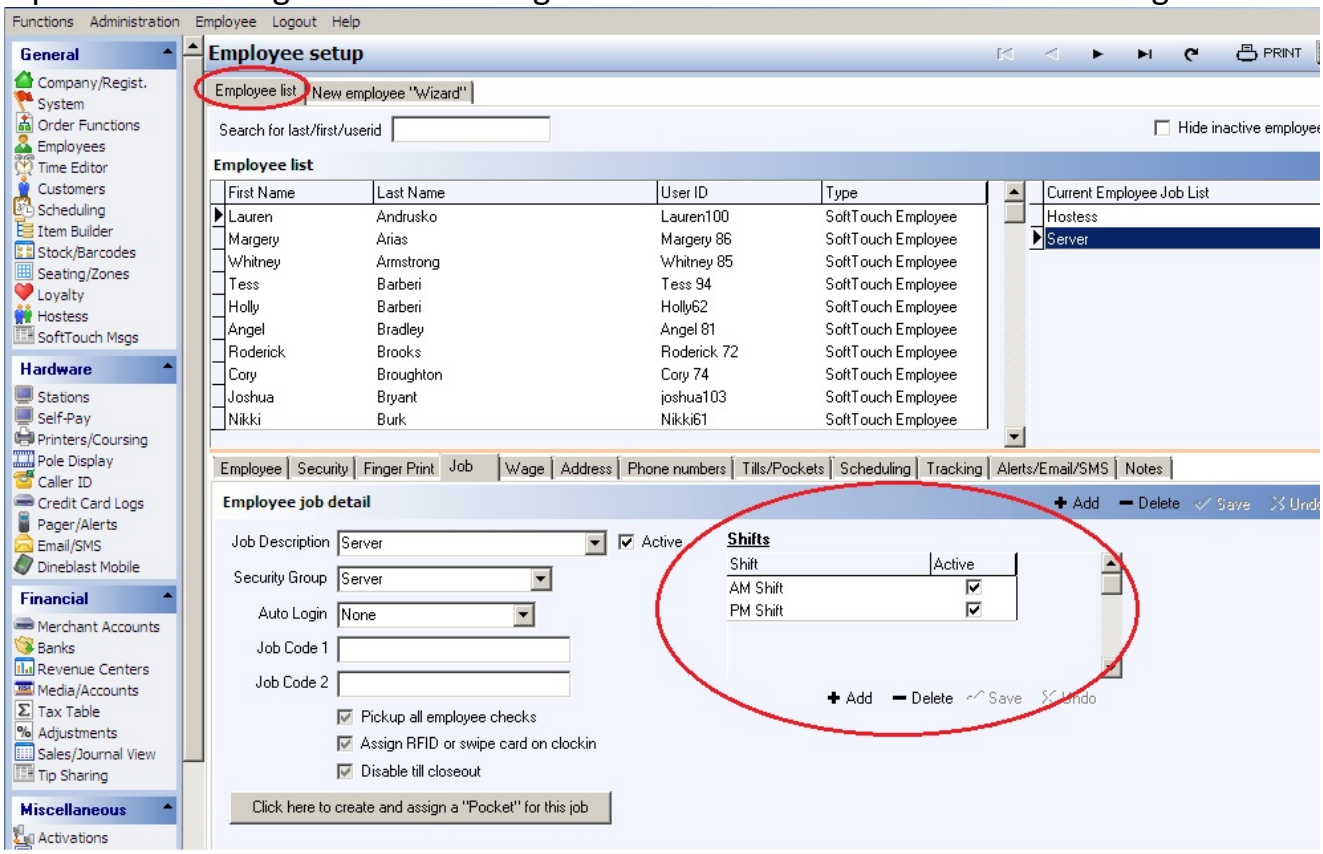
6. The last screen will vary depending on what job you selected…see below for the job types and what to do

****The next 4 pages will describe how to add drawers or pockets (server/waiter banks that turn in $ after shift) to the respective jobs**

**SERVERS**

For Servers, it will ask you Self Banking.

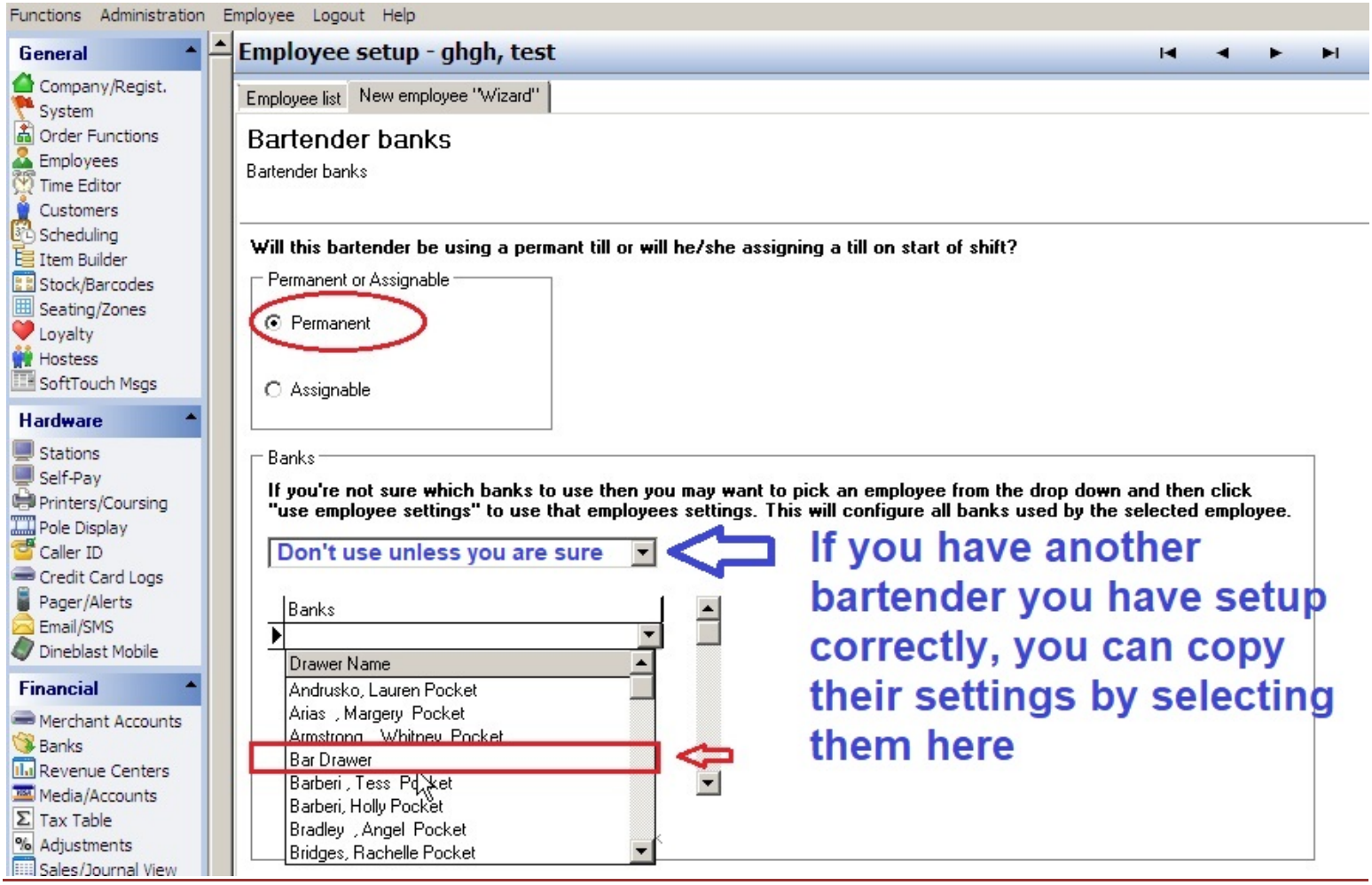
**After finishing adding a server, return the **Employee List** (tab at the top). Goto their Job tab. On the right side you will see **Shifts**. Change (click in right side of box to activate dropdown) the All Day Shift to AM Shift. Hit the **+Add** under that and select PM Shift – This is a very important step. If you server works a double, this is what divides their 2 reports for the day. If you do not do this, both reports will run together and the night cash due will also include the morning cash due numbers.



**BARTENDERS**

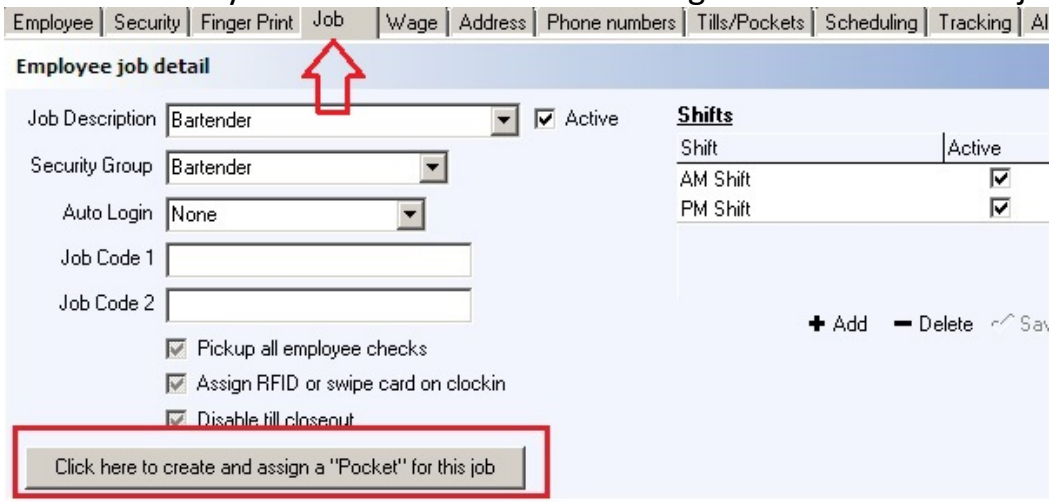
For bartenders, it will have you add their drawer options on the last page. Select Permanent option and then drop down the drawer selection and pick the drawer that is correct. Ex. Bar Drawer – ifthere are multiple bar drawers, you can hit the **+Add** and select the other(s)

**Hit Finish**

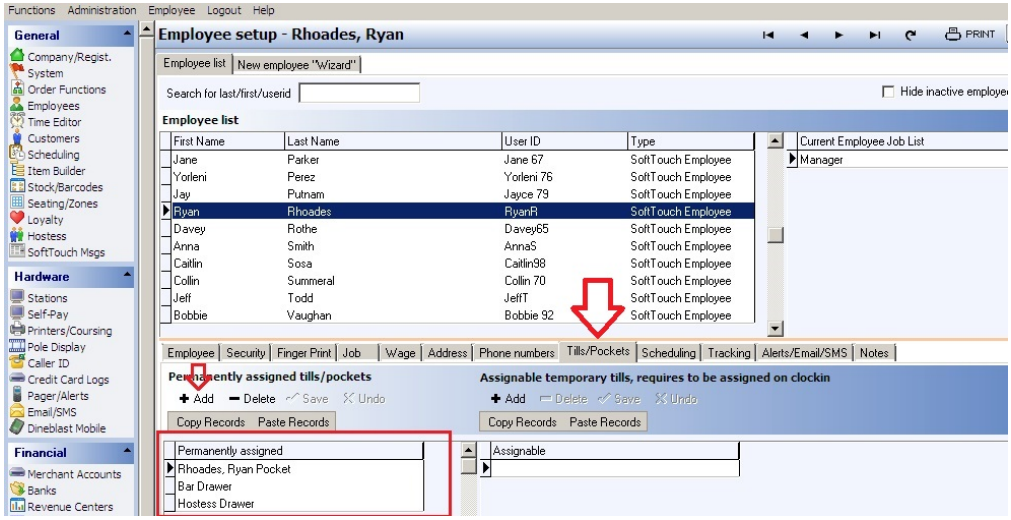


**MANAGER**

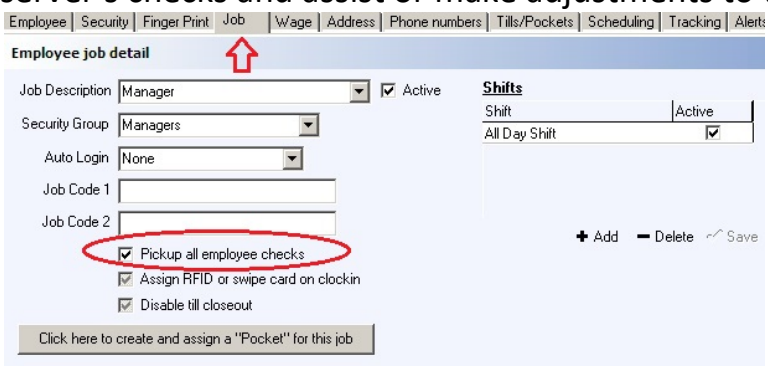
For managers, you should add all possible drawers and a pocket so that they can roam the floor and assist with cashing out a busy server's tables as well as open any drawer when they need to. Typically on the last page where the drawer is set up, it will create the server style pocket. You will then need to go back to the **Employee List** tab at the top and then to the **Tills/Pockets** tab. On the left you will see their Pocket. (If you do not see this, you can go over to the Job tab and hit the button at the bottom that says Click here to create and assign a "Pocket" for this job. (see pic)




Now on the **Till/Pockets** tab, make sure you have their pocket shown on the left side and then hit the **+Add** above the list and select the Bar Drawer. If multiple drawers exist, repeat (i.e. Hostess Drawer etc.)




Lastly, on their **Job** tab, check the box that says Pickup all Employee Checks. This allows them to server's checks and assist or make adjustments to them. VERY IMPORTANT



**HOSTESS**

If your hostess takes to go orders or puts in orders and receives payments at all, use the following guidelines to set them up:

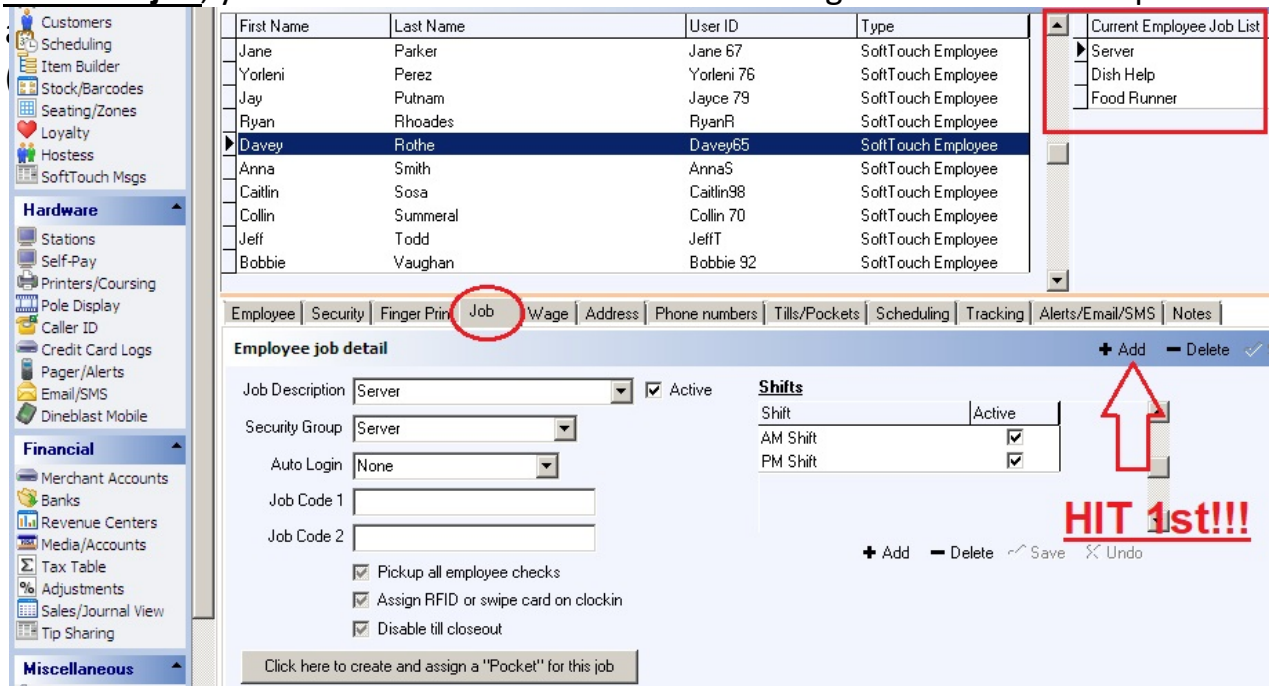
*If you have them at a physical drawer, set them up like a bartender above. You can use Hostess for the Job Description and Bartender for the Security group (this will allow them to open the drawer etc) – they would, of course, only need the Hostess Drawer on the last page of the add employee wizard

*If they work out of a staff bank like a server, set them up like a server above. Use Hostess as Job Description and Server as the Security Group

If they do not take $ or orders, you can just use Employee or Clock in/Out only for a Security Group

## Add a Job to an existing Employee (or disable one)

Go to the employee and their **Job** tab. Very important to Hit **+ Add** in middle blue bar on far right *first*- Form on left will blank out all items - put in Job Name and Security Group – For Servers, Also change the All Day Shift to the right to AM Shift – hit the little Add button under that and add a PM Shift -make sure you assign whatever tills for the new job on Tills/Pockets. If you need to create a pocket for this job there is a button on the Job tab for that. If you get an error *Cannot delete this record*…hit the Undo button to right of the +Add or close Backoffice and reopen it. This means you did not hit +Add fist and are trying to change an existing job. You cannot do that. If you need to **disable a job**, you can uncheck the Active box to the right of the Job Description. To select a job, its




## Change Login #

Login to Backoffice – Go to Employees – find the employee to change login in the list. Go to their **Security tab**. Hit the Change Swipe ID button. Type new number in both blanks (swipe card here if using). Hit OK.

