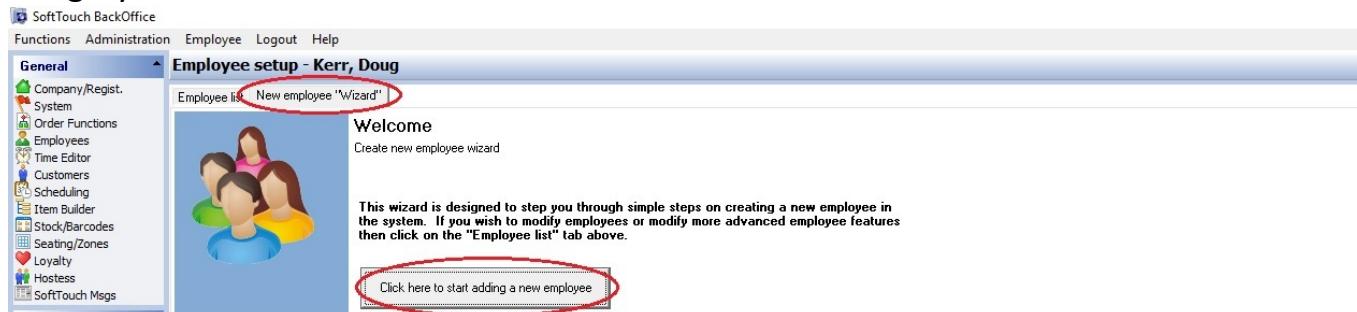


Adding Employees

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.

The screenshot shows the 'Employee setup' interface. On the left, a sidebar lists categories: General, Hardware, Financial, and Miscellaneous. Under 'Miscellaneous', 'Activations' is selected. The main area has tabs for 'Employee list' (circled in red), 'New employee "Wizard"', and a search bar. A 'Current Employee Job List' sidebar shows 'Hostess' and 'Server'. The 'Employee list' table includes columns: First Name, Last Name, User ID, and Type. The 'Job' tab is active, showing 'Employee job detail' for a 'Server'. It includes fields for Job Description, Security Group, Auto Login, Job Code 1, and Job Code 2. Below these are checkboxes for 'Pickup all employee checks', 'Assign RFID or swipe card on clockin', and 'Disable till closeout'. A large red circle highlights the 'Shifts' section, which contains a table with rows for 'Shift' (AM Shift, PM Shift) and 'Active' status (both checked). Buttons for '+ Add', 'Delete', 'Save', and 'Undo' are visible.

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 – if there are multiple bar drawers, you can hit the **+Add** and select the other(s)

Hit Finish

The screenshot shows the 'Employee setup - ghgh, test' window. On the left, a sidebar menu includes 'General' (Company/Regist., System, Order Functions, Employees, Time Editor, Customers, Scheduling, Item Builder, Stock/Barcodes, Seating/Zones, Loyalty, Hostess, SoftTouch Msgs), 'Hardware' (Stations, Self-Pay, Printers/Coursing, Pole Display, Caller ID, Credit Card Logs, Pager/Alerts, Email/SMS, Dineblast Mobile), and 'Financial' (Merchant Accounts, Banks, Revenue Centers, Media/Accounts, Tax Table, Adjustments, Sales/Journal View). The main area displays 'Bartender banks' settings. A note asks if the bartender is using a permanent till or assigning a till on start of shift, with 'Permanent' selected. Below is a 'Banks' section with a dropdown menu 'Don't use unless you are sure'. A red box highlights the 'Bar Drawer' option in a dropdown list of names: Andrusko, Lauren Pocket; Arias, Margery Pocket; Armstrong, Whitney Pocket; Bar Drawer; Barberi, Tess Pocket; Barberi, Holly Pocket; Bradley, Angel Pocket; Bridges, Rachelle Pocket.

If you have another bartender you have setup correctly, you can copy their settings by selecting them here

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)

The screenshot shows the 'Employee job detail' screen. At the top, there is a navigation bar with tabs: Employee, Security, Finger Print, Job, Wage, Address, Phone numbers, Tills/Pockets, Scheduling, Tracking, and Alert. The 'Job' tab is selected. Below the navigation bar, there is a form for defining a job. It includes fields for Job Description (Bartender), Security Group (Bartender), Auto Login (None), Job Code 1, and Job Code 2. There are also checkboxes for 'Pickup all employee checks', 'Assign RFID or swipe card on clockin', and 'Disable till closeout'. At the bottom of the form, there is a button labeled 'Click here to create and assign a "Pocket" for this job' which is highlighted with a red box and an upward-pointing red arrow.

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.)

The screenshot shows the 'Employee setup - Rhoades, Ryan' screen. The left sidebar lists various functions: General, Hardware, Financial, Administration, Employee, Logout, Help. The 'Hardware' section is expanded, showing stations, self-pay, printers/couriers, pole displays, caller ID, credit card logs, page/alerts, email/sms, and dineblast mobile. The main area shows an 'Employee list' grid with columns: First Name, Last Name, User ID, Type. An entry for 'Ryan Rhoades' is selected. Below the list are two tabs: 'Permanently assigned tills/pockets' and 'Assignable temporary tills, requires to be assigned on clockin'. The 'Permanently assigned tills/pockets' tab shows a list with 'Rhoades, Ryan Pocket' and 'Bar Drawer'. The 'Assignable temporary tills...' tab shows a list with 'Assignable' and 'Rhoades, Ryan Pocket'. Both lists are highlighted with red boxes and arrows.

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**

The screenshot shows the 'Employee job detail' screen again. The 'Job' tab is selected. At the bottom of the form, there is a group of checkboxes: 'Pickup all employee checks' (which is circled in red), 'Assign RFID or swipe card on clockin', and 'Disable till closeout'. The 'Click here to create and assign a "Pocket" for this job' button is also visible at the bottom.

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 - 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 first 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 at top right

(Current Employee Job List)

The screenshot shows the 'Employee' screen in the SoftTouch BackOffice. The left sidebar has categories like Customers, Scheduling, Item Builder, etc. The main area has tabs: Employee, Security, Finger Print, **Job**, Wage, Address, Phone numbers, Tills/Pockets, Scheduling, Tracking, Alerts/Email/SMS, Notes. The 'Job' tab is circled in red. Below it is the 'Employee job detail' section. A red box highlights the 'Current Employee Job List' dropdown on the right. A large red arrow points upwards from the 'Job' tab towards this dropdown. The 'Job Description' is set to 'Server'. The 'Shifts' section shows 'AM Shift' and 'PM Shift' both checked. A red box highlights the 'Active' checkbox in the 'Job Description' section. A red arrow points upwards from the 'Active' checkbox towards the 'Current Employee Job List' dropdown. A red box highlights the '+ Add' button in the top right of the 'Employee job detail' section. A red box highlights the 'HIT 1st!!!' button in the bottom right of the same section.

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.

The screenshot shows the 'Employee setup' screen for Kerr, Doug. The left sidebar has categories like Company/Regist, System, Order Functions, Employees, etc. The main area has tabs: Employee, Security, Finger Print, Job, Wage, Address, Phone numbers, Tills/Pockets, Scheduling, Tracking, Alerts/Email/SMS, Notes. The 'Security' tab is circled in red. Below it is the 'Employee list' section. A red box highlights the 'Employee list' dropdown on the left. A red box highlights the 'Change Swipe ID' button in the bottom right of the security settings section. The 'Employee list' table shows employees: Tran, Kiosk, Shane, Brienna, and Doug.