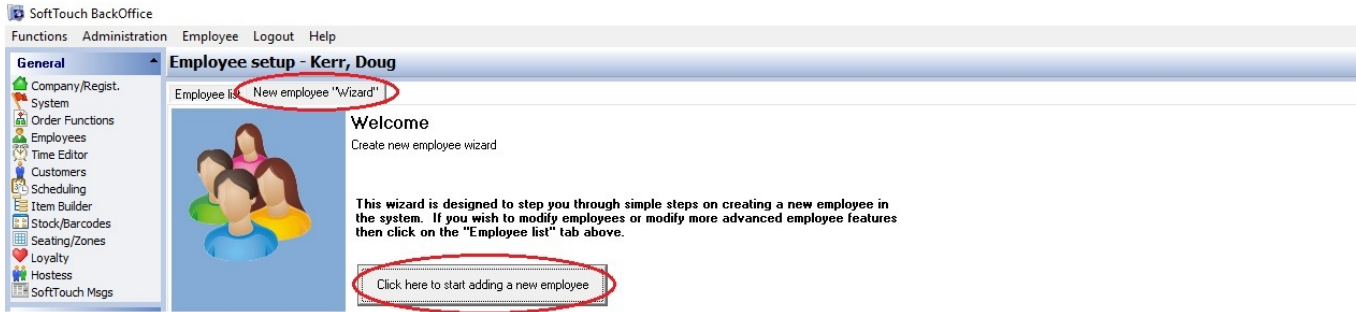


Adding Employees

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.

Functions Administration Employee Logout Help

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

Financial

- Merchant Accounts
- Banks
- Revenue Centers
- Media/Accounts
- Tax Table
- Adjustments
- Sales/Journal View
- Tip Sharing

Miscellaneous

- Activations

Employee setup

Employee list New employee "Wizard"

Search for last/first/userid ☐ Hide inactive employee

First Name	Last Name	User ID	Type
Lauren	Andrusko	Lauren100	SoftTouch Employee
Margery	Arias	Margery 86	SoftTouch Employee
Whitney	Armstrong	Whitney 85	SoftTouch Employee
Tess	Barberi	Tess 94	SoftTouch Employee
Holly	Barberi	Holly62	SoftTouch Employee
Angel	Bradley	Angel 81	SoftTouch Employee
Roderick	Brooks	Roderick 72	SoftTouch Employee
Cory	Broughton	Cory 74	SoftTouch Employee
Joshua	Bryant	joshua103	SoftTouch Employee
Nikki	Burk	Nikki61	SoftTouch Employee

Current Employee Job List

- Hostess
- Server

Employee job detail

Job Description ☒ Active

Security Group

Auto Login

Job Code 1

Job Code 2

Shifts

Shift	Active
AM Shift	<input checked="" type="checkbox"/>
PM Shift	<input checked="" type="checkbox"/>

+ Add - Delete Save Undo

☒ Pickup all employee checks

☒ Assign RFID or swipe card on clockin

☒ Disable till closeout

Click here to create and assign a "Pocket" for this job

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

Functions Administration Employee Logout Help

General

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- Adjustments
- Sales/Journal View

Employee setup - ghgh, test

Employee list New employee "Wizard"

Bartender banks

Bartender banks

Will this bartender be using a permant till or will he/she assigning a till on start of shift?

☐ Permanent or Assignable

☒ Permanent

☐ Assignable

Banks

If you're not sure which banks to use then you may want to pick an employee from the drop down and then click "use employee settings" to use that employees settings. This will configure all banks used by the selected employee.

Don't use unless you are sure

Banks

Drawer Name
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)

Employee job detail

Job Description: Bartender ☒ Active

Security Group: Bartender

Auto Login: None

Job Code 1:

Job Code 2:

☒ Pickup all employee checks

☒ Assign RFID or swipe card on clockin

☒ Disable till closeout

Click here to create and assign a "Pocket" for this job

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.)

Employee setup - Rhoades, Ryan

Employee list: New employee "Wizard"

Search for last/first/userid:

Employee list

First Name	Last Name	User ID	Type
Jane	Parker	Jane 67	SoftTouch Employee
Yorleni	Perez	Yorleni 76	SoftTouch Employee
Jay	Putnam	Jayne 79	SoftTouch Employee
Ryan	Rhoades	RyanR	SoftTouch Employee
Davey	Roth	Davey65	SoftTouch Employee
Anna	Smith	AnnaS	SoftTouch Employee
Caitlin	Sosa	Caitlin98	SoftTouch Employee
Collin	Sumner	Collin 70	SoftTouch Employee
Jeff	Todd	JeffT	SoftTouch Employee
Bobbie	Vaughan	Bobbie 92	SoftTouch Employee

Current Employee Job List: Manager

Employee | Security | Finger Print | Job | Wage | Address | Phone numbers | Tills/Pockets | Scheduling | Tracking | Alerts/Email/SMS | Notes

Permanently assigned tills/pockets

+ Add - Delete Save Undo

Copy Records Paste Records

Assignable temporary tills, requires to be assigned on clockin

+ Add - Delete Save Undo

Copy Records Paste Records

Permanently assigned tills/pockets

- Rhoades, Ryan Pocket
- Bar Drawer
- Hostess Drawer

Assignable

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**

Employee job detail

Job Description: Manager ☒ Active

Security Group: Managers

Auto Login: None

Job Code 1:

Job Code 2:

☒ Pickup all employee checks

☒ Assign RFID or swipe card on clockin

☒ Disable till closeout

Click here to create and assign a "Pocket" for this job

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 SoftTouch BackOffice interface. On the left is a navigation menu with categories: Customers, Hardware, Financial, and Miscellaneous. The main area displays the 'Current Employee Job List' table and the 'Employee job detail' form.

First Name	Last Name	User ID	Type
Jane	Parker	Jane 67	SoftTouch Employee
Yorleni	Perez	Yorleni 76	SoftTouch Employee
Jay	Putnam	Jayce 79	SoftTouch Employee
Ryan	Rhoades	RyanR	SoftTouch Employee
Davey	Rothe	Davey65	SoftTouch Employee
Anna	Smith	AnnaS	SoftTouch Employee
Caitlin	Sosa	Caitlin98	SoftTouch Employee
Collin	Summerral	Collin 70	SoftTouch Employee
Jeff	Todd	JeffT	SoftTouch Employee
Bobbie	Vaughan	Bobbie 92	SoftTouch Employee

The 'Employee job detail' form has tabs: Employee, Security, Finger Print, Job, Wage, Address, Phone numbers, Tills/Pockets, Scheduling, Tracking, Alerts/Email/SMS, Notes. The 'Job' tab is selected. It shows fields for Job Description (Server), Security Group (Server), Auto Login (None), Job Code 1, and Job Code 2. There are checkboxes for 'Active', 'Pickup all employee checks', 'Assign RFID or swipe card on clockin', and 'Disable till closeout'. A 'Shifts' section shows AM Shift and PM Shift, both with 'Active' checkboxes. A red arrow points to the '+ Add' button in the middle blue bar on the right, with the text 'HIT 1st!!!'.

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 - Kerr, Doug' form. The 'Security' tab is selected. It shows fields for 'Active/Account Disabled', 'Is account locked', 'System User ID' (DougK), 'Backoffice Password', 'Password expires' (3/30/1900), 'SoftTouch Swipe ID/RFID', 'Swipe ID/RFID never expires', 'Swipe ID/RFID expires' (Never), 'Change Swipe ID', 'Change RFID', 'Clear Swipe ID', and 'Clear RFID'. A red arrow points to the 'Change Swipe ID' button, with the text 'HIT 1st!!!'.