Employee Setup

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The Employee record serves as a master employee record and one spot to manage employee details such as name, contact information, a picture, and scheduling availability. This employee may work at multiple locations and may have a separate employee record in the POS at various locations. The employee form will be described directly below and later in this training post the POS integration and linking to employees will be described.

Employee Information Import from POS

Employee information that resides in the POS system will be automatically imported once the POS Integration has been completed. Typically this will include the Employee Name, Locations, and Job Titles. An organizational decision will need to be made to determine where the Employee information will be maintained:

1) Within **Restaurant365**

2) Within the **POS**

As not all Employee information is importable from all POS systems, it is recommended that Employee information be updated and maintained within Restaurant365.

To ensure that the employee information in the POS does not overwrite the employee information in Restaurant365, navigate to the 'Preferences' pane via the 'Administration' menu in the top ribbon:
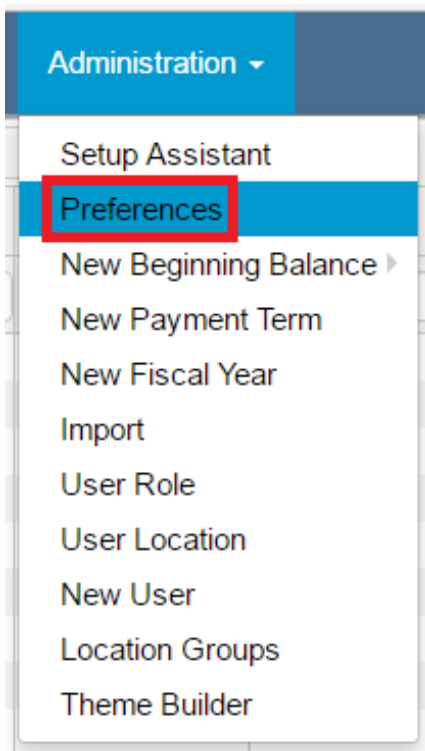
Upon loading, navigate to the 'Miscellaneous' tab and verify that the 'POS Overwrite Employee Info' checkbox is unchecked. By default this value should be unchecked. With this checkbox unchecked, POS Employee data will not overwrite Restaurant365 Employee data during the daily imports.

Creating/Viewing/Editing Employees

There are 2 ways to create employees in the system. The most common is that they are imported from the POS each night so new employees will be automatically created in Restaurant365. If you want to setup a new employee before they are in the POS, perhaps for scheduling purposes, then you can also set them up manually.

To setup an employee manually, go to Scheduling – New Employee in the top ribbon.

To view existing employees, go to Scheduling – Employees or Operations – Labor – Employees in the left hand navigation pane and double click the row of an employee you want to edit.

The employee form has various tabs to enter and review information about the employee as described below:

General tab

This tab contains most of the information you setup for the employee such as name, contact information, primary location, and preferred contact method. A few key fields are described below

- Picture – to store an image of the employee click the Upload Picture button and browse out to the image on your computer. This image will show in various places in the application including the scheduling screen.
- Address – to set the address, click the Change Address button to open the address popup form where you can set the address
- Preferred Contact Method – this drives how the employee is contacted with alerts from the system. These alerts can be manager announcements or items from the scheduling module such as a list of their shifts when the schedule is published, open shift alerts, time off request approved or denied, etc. Contact method options are Text, Email, or Both Text & Email.
- Break Waiver – this is used in labor break violation calculations as described in **Break and Shift Violation training**
- Upload File button – to add other attachments such as signed copies of employment agreements, break waivers, etc, upload them here

Labor Note tab

On the Daily Sales Summary that gets filled out from nightly POS imports, the manager can record notes about the employee such as "No show" or "Late for shift" and a list of those notes will be shown on this tab to use during employee reviews.

Punches tab

This list shows all the detailed labor punches when this employee has clocked in and out of the POS.

Locations tab

The POS employee record is described in detail later in this post. If this employee has an employee record in the POS at more than 1 location then this tab shows all the locations of the POS employees that exist for this employee.

Availability tab

This tab is used in scheduling to help the manager determine when to schedule the employee. This is where you specify the general availability for the employee for each day of the week. Options are Available All Day, Unavailable All Day, or specific start and end times of availability. Setting this won't prevent the employee from being scheduled at these times but they will show up on the schedule as a visual flag for the manager to take into account when scheduling.

	Available All Day	Unavailable All Day	Available Start		Available End	
Sunday	☐	☑	12:00 AM	🕐	12:00 AM	🕐
Monday	☑	☐	12:00 AM	🕐	11:59 PM	🕐
Tuesday	☐	☐	7:00 AM	🕐	2:00 PM	🕐
Wednesday	☐	☐	2:00 PM	🕐	9:00 PM	🕐
Thursday	☑	☐	12:00 AM	🕐	11:59 PM	🕐
Friday	☑	☐	12:00 AM	🕐	11:59 PM	🕐
Saturday	☑	☐	12:00 AM	🕐	11:59 PM	🕐

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Jobs tab

On this tab you can see and manage which jobs are assigned to this employee. To add a job select it from the fields above the grid and click Add. To remove a job click the Delete button (trashcan icon) on the row you want to remove.

This also has a Rating field. The rating is used in scheduling so that you can set that a specific shift must be filled by an employee with a certain rating (i.e. only 4 star or above bartenders can work the Friday night shift). You can use this to limit the possible employees who can work that shift based on the rating. Ratings can be easily managed by clicking the appropriate stars on the row next to each job

Responsibilities tab

This tab shows which job responsibilities this employee has. You can add them by selecting from the dropdown above the grid and clicking the Add button and can remove them by clicking the trashcan icon on the row you want to remove. Job responsibilities allow you to break a job down into more detailed responsibilities/qualifications/certifications and only certain employees will meet that criteria, and you can set those on the employees that have them. Then on shifts in scheduling you can specify what responsibility they must have in order to fulfill that shift and this will limit which possible employees can be selected. For example if you have a job called Cook but schedule where one cook shift is working the grill and another the fryer, then Grill and Fryer would be setup as responsibilities on the job and then assigned to whichever employees are qualified to do each of those. Then on the shift in the schedule you can specify it will be for job = Cook and responsibility = Fryer and then only

employees with the Fryer responsibility qualification will be able to be assigned to that shift.

You must assign responsibilities to jobs before you can assign them to employees. If no responsibilities have been assigned to the jobs this employee has, then no responsibilities will be available to assign to this employee.

Job Responsibilities are described in more detail in the **job responsibility training**

POS Employee Link

To manage this relationship between multiple POS employee records pointing to the same master employee in Restaurant365, the system has 2 types of employee records:

1. POS Employee record – these records match the records in the POS system at each location. So if an employee works at more than 1 location then they will have more than 1 POS Employee record in Restaurant365. These only have a few fields on them just to allow the system to match to the POS by POS ID, Location, and Full Name. This record isn't used in the scheduling module.

2. Employee record – These records serve as the main employee record. If labor notes are made about an employee or reviews will be held, this is the record referenced on those reports and forms. If you store a break waiver for the employee it is on this record. You should work to keep the system clean so there is only 1 of these records per employee.

POS Employee Mapping

During POS import, the system creates a POS Employee record and a matching Employee record for any employee that doesn't already have a POS Employee record in the system at that location. The POS Employee record is linked to the Employee record by the Employee link field on the POS Employee form. By default when a new POS Employee is identified it creates both type of employee records in the system and links them. However, if the employee already has a master Employee record in the system because they work at another location then follow these steps to link the new POS Employee record to the master Employee:

1. Open the POS Employee record from the list (accessed in left hand navigation under Operations – Labor – POS Employees)

2. Use the Employee dropdown to unlink the new employee record that got created and select the master Employee record for that person that already existed and then hit Save (this form doesn't allow you to change Full Name, POS ID, or Location and you cannot delete these records because they're created by the POS)

3. Open the new Employee record that just got created that you unlinked from the POS Employee from the list (accessed in left hand navigation under Operations – Labor – POS Employees)

Example:

- John Smith works at the Bar & Grill Cerritos location and the POS imported a POS Employee and an Employee record for him with this as his primary location

- Then in the future he worked at the Belmont Shore location. During the POS import from Belmont Shore the first time, a POS Employee record was created for John Smith and an Employee record was created for John Smith with Belmont Shore as his primary location. The reason the system creates an Employee record for him again is at this time there is no way for the system to know John Smith is the same person as the other John Smith (since you may have multiple employees with the same name).

- So we want to link the new POS Employee record for John Smith at Belmont Short to the Employee record that already existed for him that had Bar & Grill Cerritos as his primary location and remove the 2nd master Employee record for John Smith that just got created

- To do this we open the POS Employee record for John Smith at Belmont Short, change the employee

dropdown to John Smith – Bar & Grill Cerritos and Save & Close the window (pictured below)

- Then go to the Employee list and open the Employee record for John Smith where primary location is Belmont Shore and Delete that record

Save ▾

Full Name	John Smith
POS ID	76
Location	Belmont Shore ▾
Employee	John Smith - Bar & Grill Cerritos ▾