📒 HR Guide

People operations: employees, attendance, leave, payroll, documents, performance, and tip distribution.

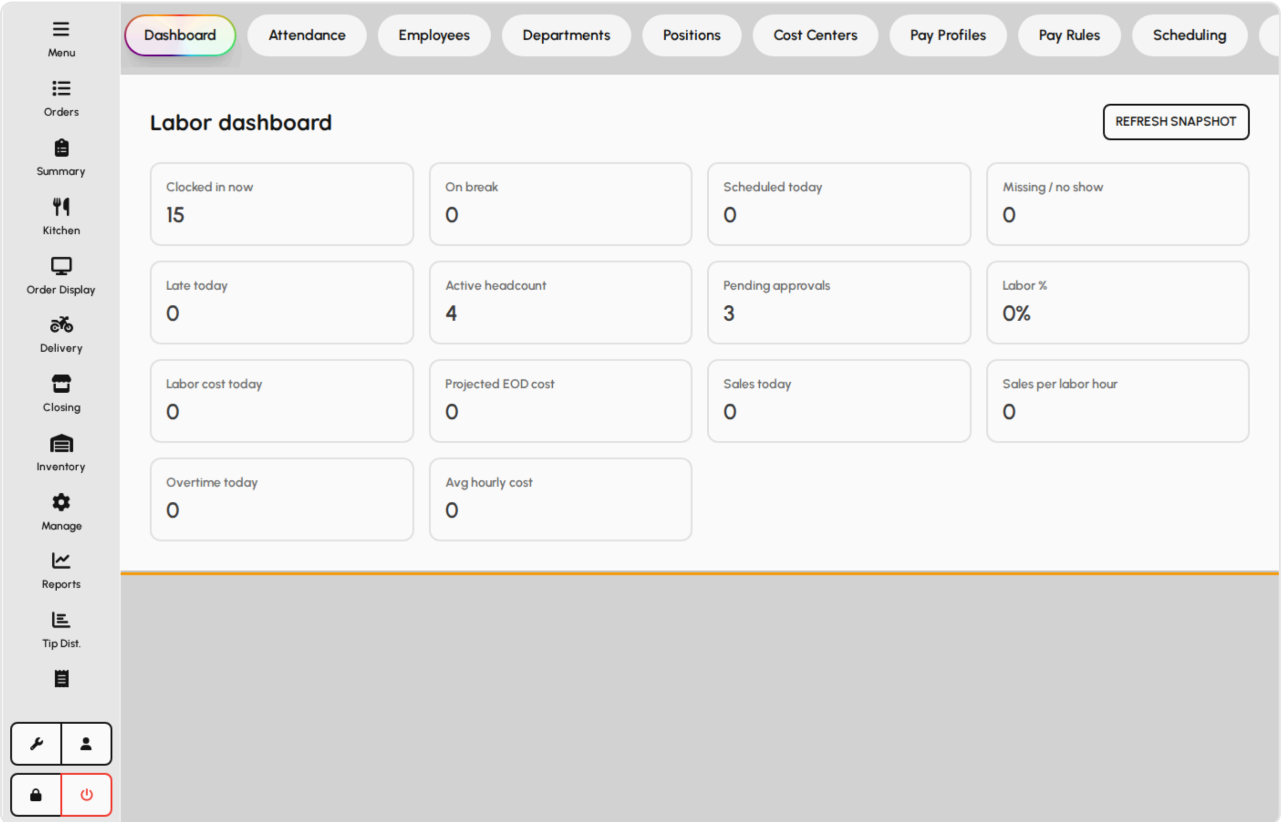
Contents

HR overview

HR covers people operations: employees, attendance, leave, scheduling, and payroll-related tabs. Open it from the sidebar when your role includes HR access.

Open HR

1. Sign in with a user that has HR access.
2. Tap HR in the sidebar.
3. The screen opens on the Dashboard tab by default.



HR screen with tab bar and dashboard.

Tab navigation

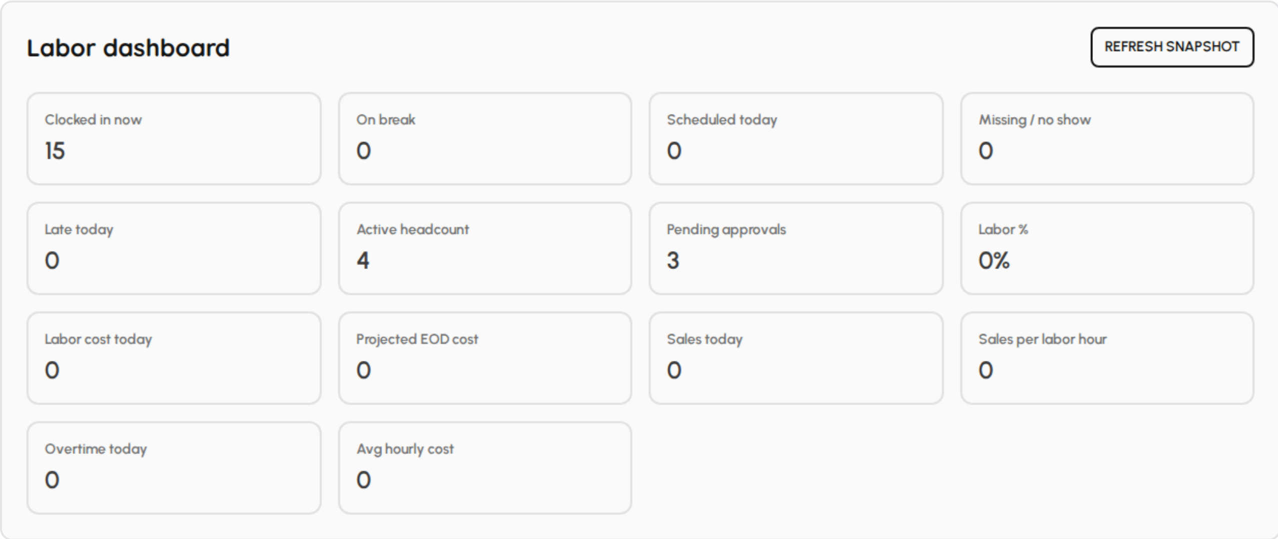
Tabs group workforce setup and day-to-day people processes. Switching may require manager PIN approval.

1. Scroll the tab bar horizontally when many tabs are visible.
2. People tabs include Employees, Departments, and Positions.
3. Time tabs include Attendance, Scheduling, Leave, and Holidays.

HR tab bar.

Dashboard

1. The Dashboard summarizes key HR metrics for the venue.
2. Use it as a starting point before opening detailed tabs.
3. Other tabs manage master data and transactional HR work.



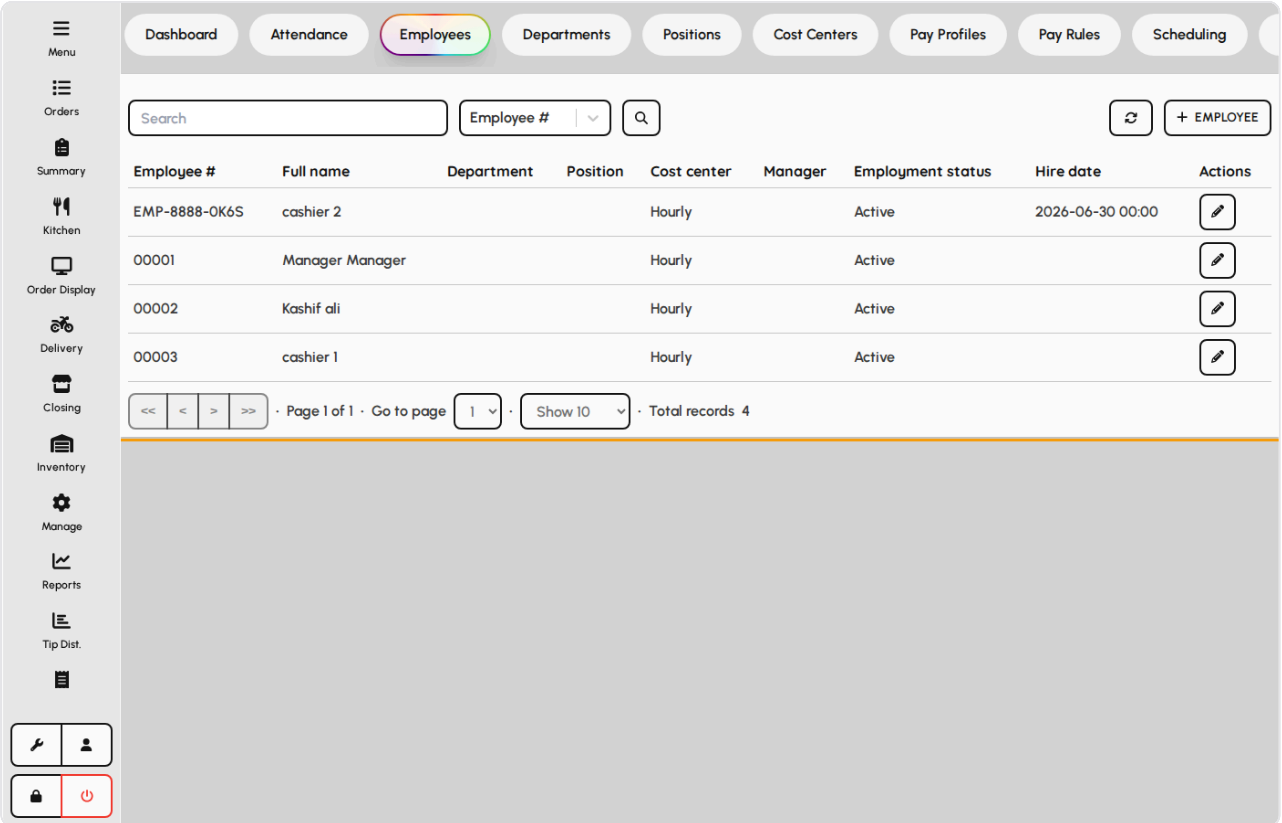
HR dashboard panel.

Employees

Maintain employee records and the organizational structure: departments and positions.

Employee list

1. Open the Employees tab.
2. Add or edit employees with role, department, and contact details.
3. Employee records feed attendance, leave, and payroll tabs.

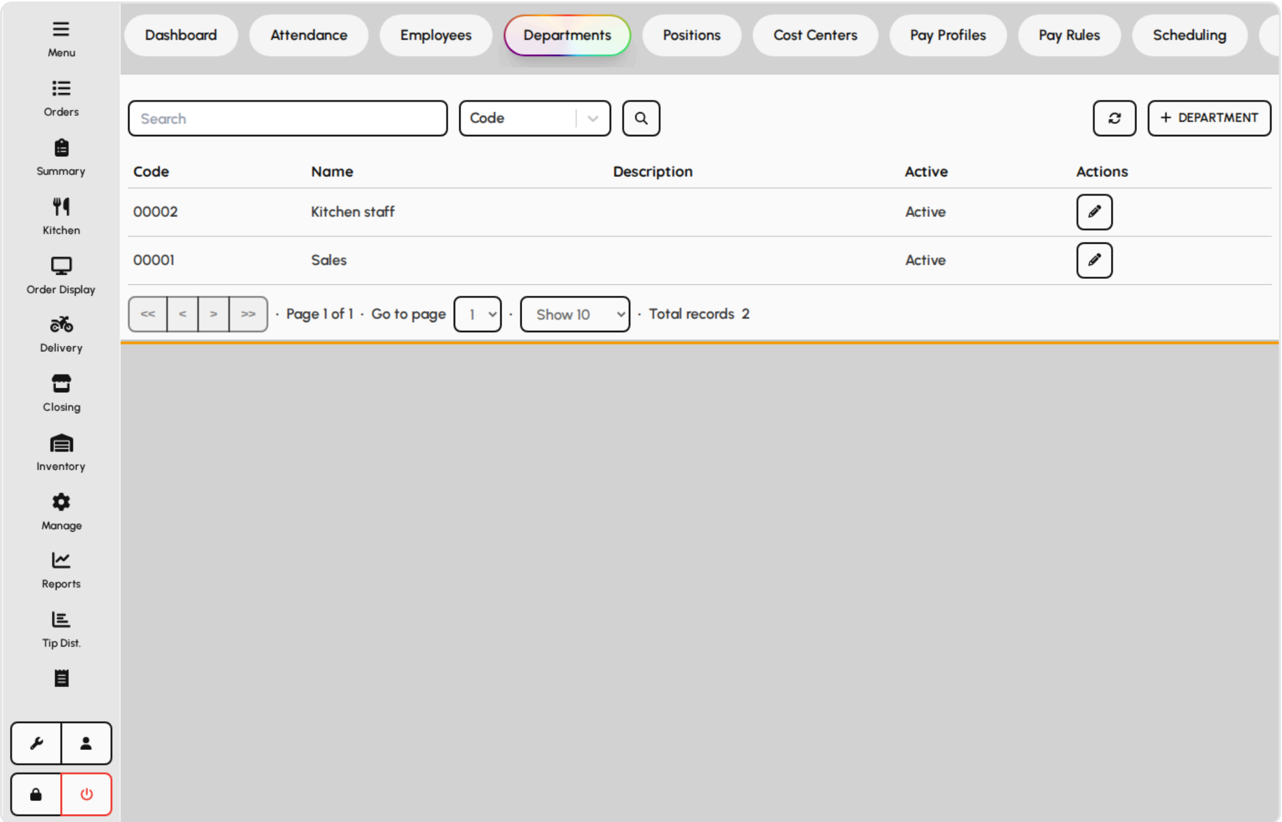


Employees tab.

Departments

Departments group staff for reporting and cost allocation.

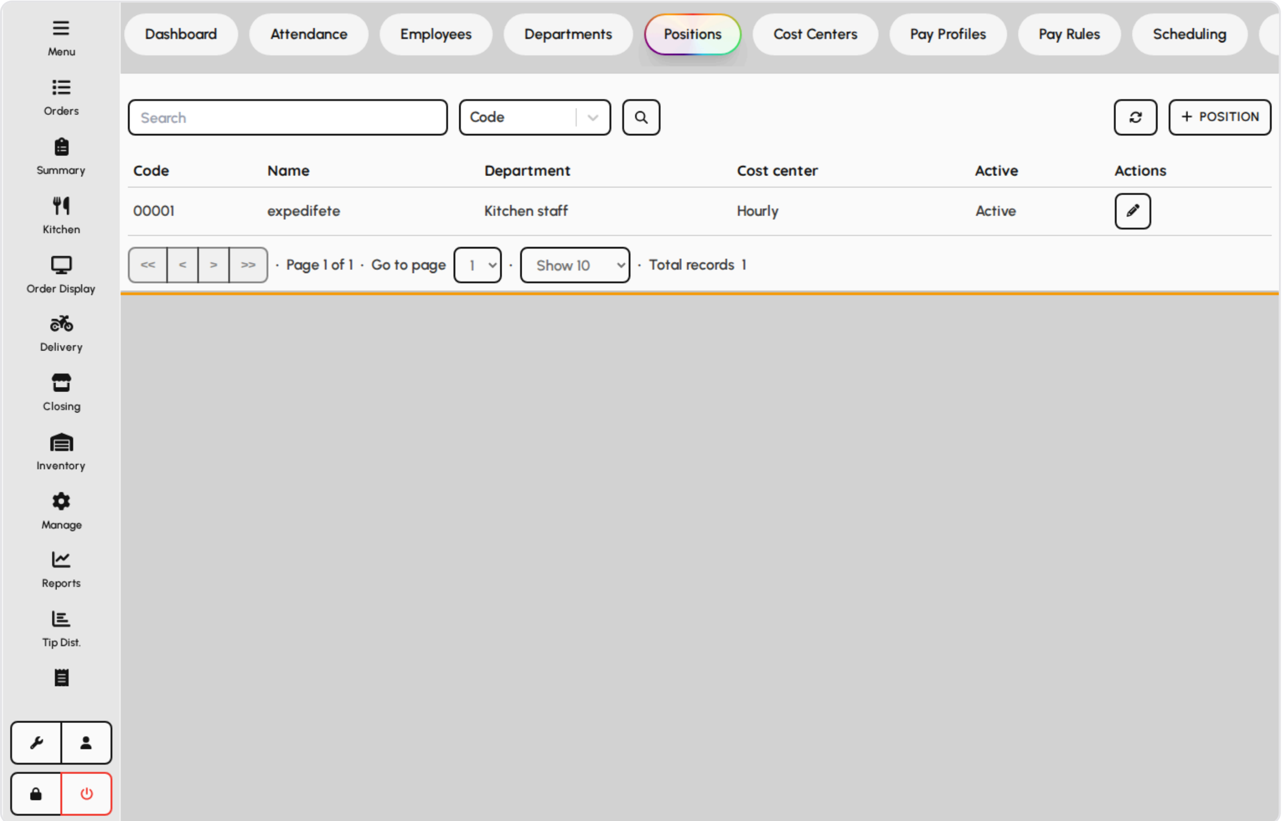
1. Open the Departments tab.
2. Create departments that match how the venue organizes teams.
3. Assign employees to departments on their employee form.



Departments tab.

Positions

1. Open the Positions tab.
2. Define job titles used on employee records and schedules.
3. Keep positions aligned with pay profiles when payroll is enabled.



Positions tab.

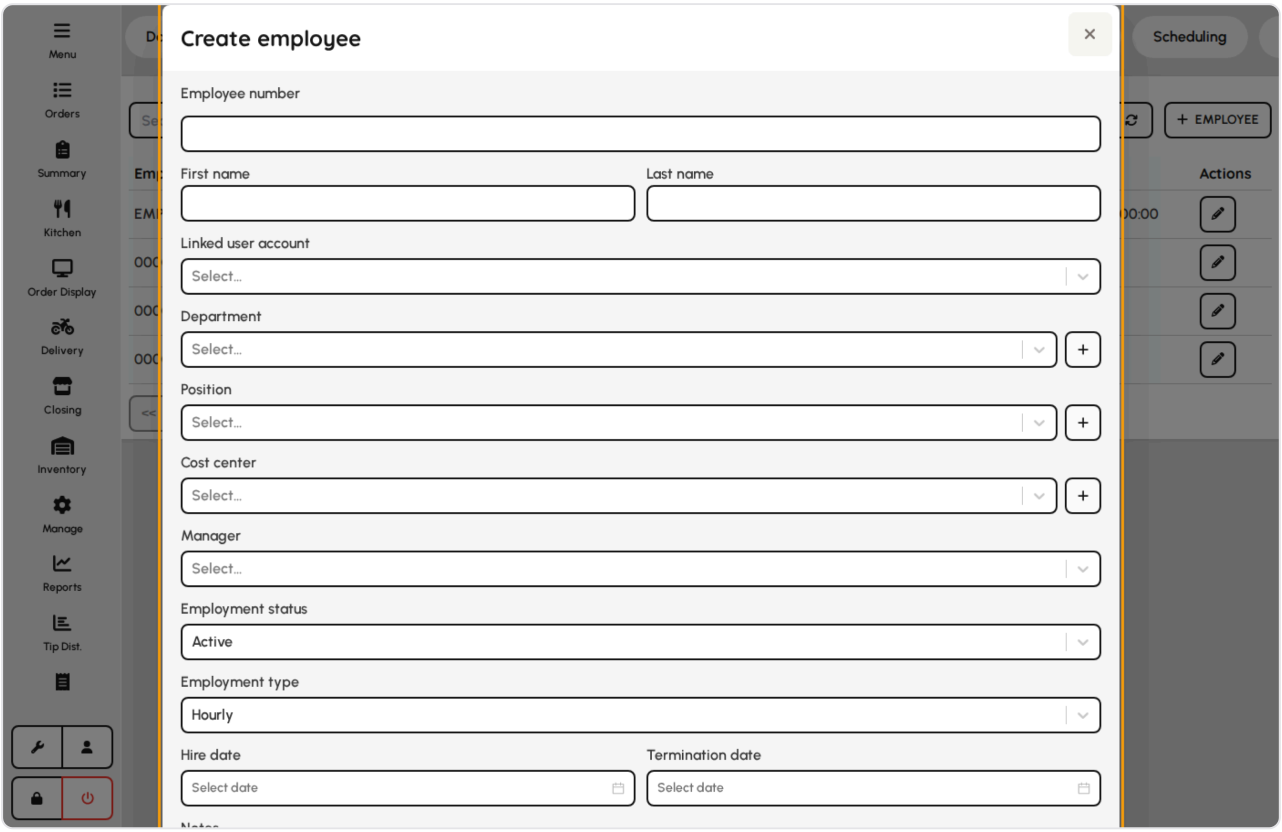
Employee form

Core HR record linking POS user, org structure, and employment dates.

1. From Employees tab click Add or edit a row.
2. Complete employee number, name, and employment details.
3. Link POS user, department, position, cost center, and manager.
4. Save — record feeds attendance, leave, and payroll.

Fields

- **Employee number** — Unique staff identifier on schedules and exports.
- **First / last name** — Legal or preferred name on HR documents.
- **Linked user** — Optional POS login tied to this employee for clock-in.
- **Department** — Organizational unit for reporting.
- **Position** — Job title used on schedules and pay rules.
- **Cost center** — Default labor cost allocation.
- **Manager** — Reporting line for approvals.
- **Employment status** — Active, inactive, terminated, on leave, or suspended.
- **Employment type** — Hourly, salary, contract, etc. — aligns with pay profiles.
- **Hire / termination date** — Service dates for tenure and eligibility.



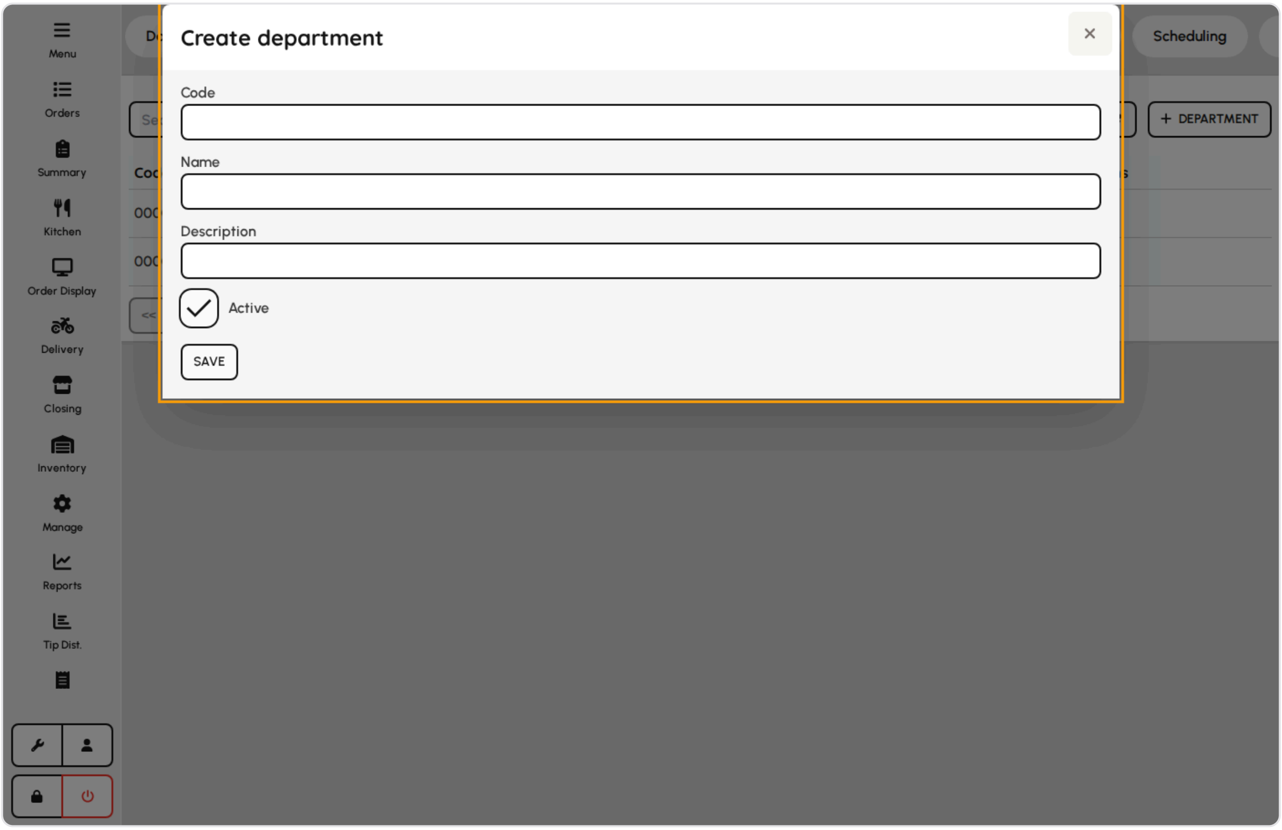
Employee create/edit modal.

Department form

1. From Departments or inline Add on employee form.
2. Enter code, name, and description.
3. Save — department appears on employees and positions.

Fields

- **Code** — Short identifier for integrations.
- **Name** — Display name in dropdowns.
- **Description** — Optional admin notes.
- **Is active** — Inactive departments are hidden from new assignments.



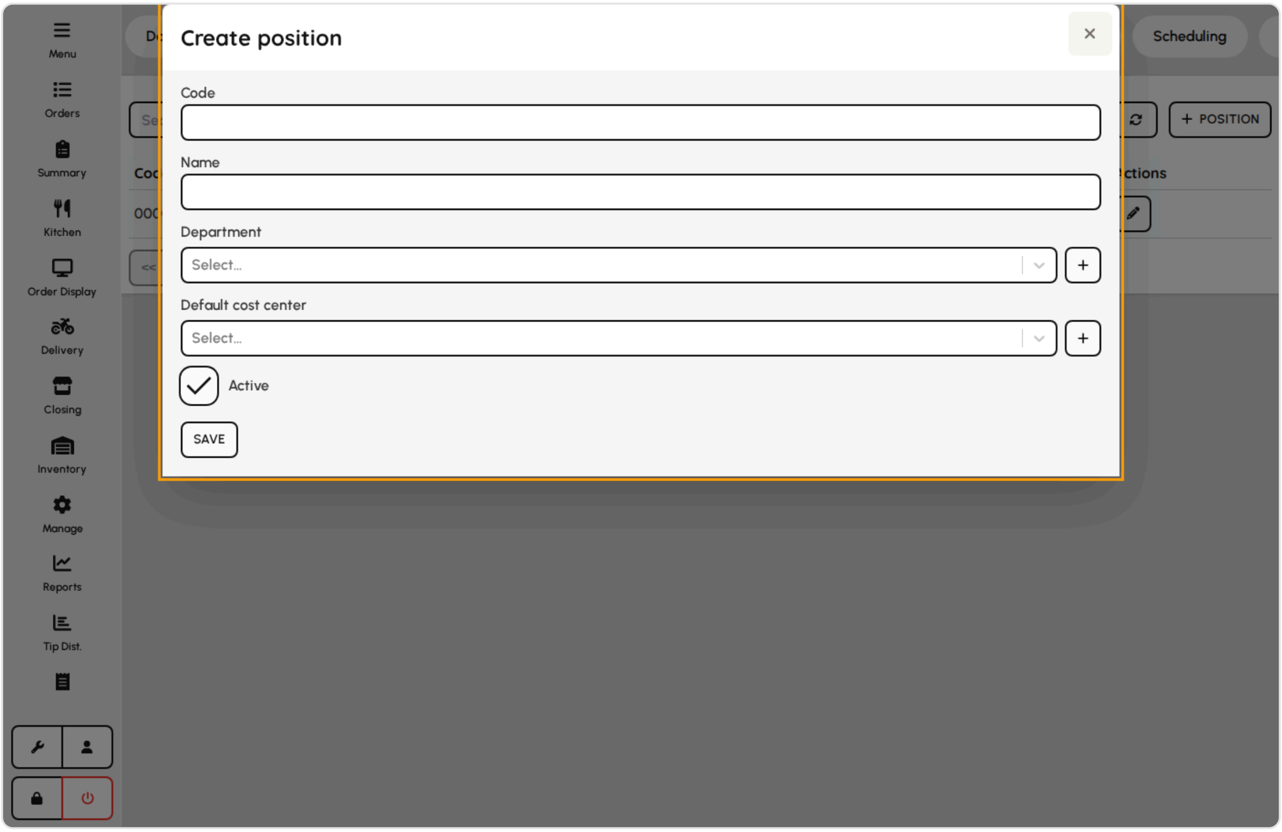
Department form.

Position form

1. From Positions or inline Add on employee form.
2. Define code, name, department, and default cost center.
3. Save — position is selectable on employees and schedules.

Fields

- **Code** — Job code for payroll exports.
- **Name** — Job title shown in HR and scheduling.
- **Department** — Default org unit for this role.
- **Default cost center** — Pre-filled on schedules for this position.
- **Is active** — Retire titles no longer hired against.



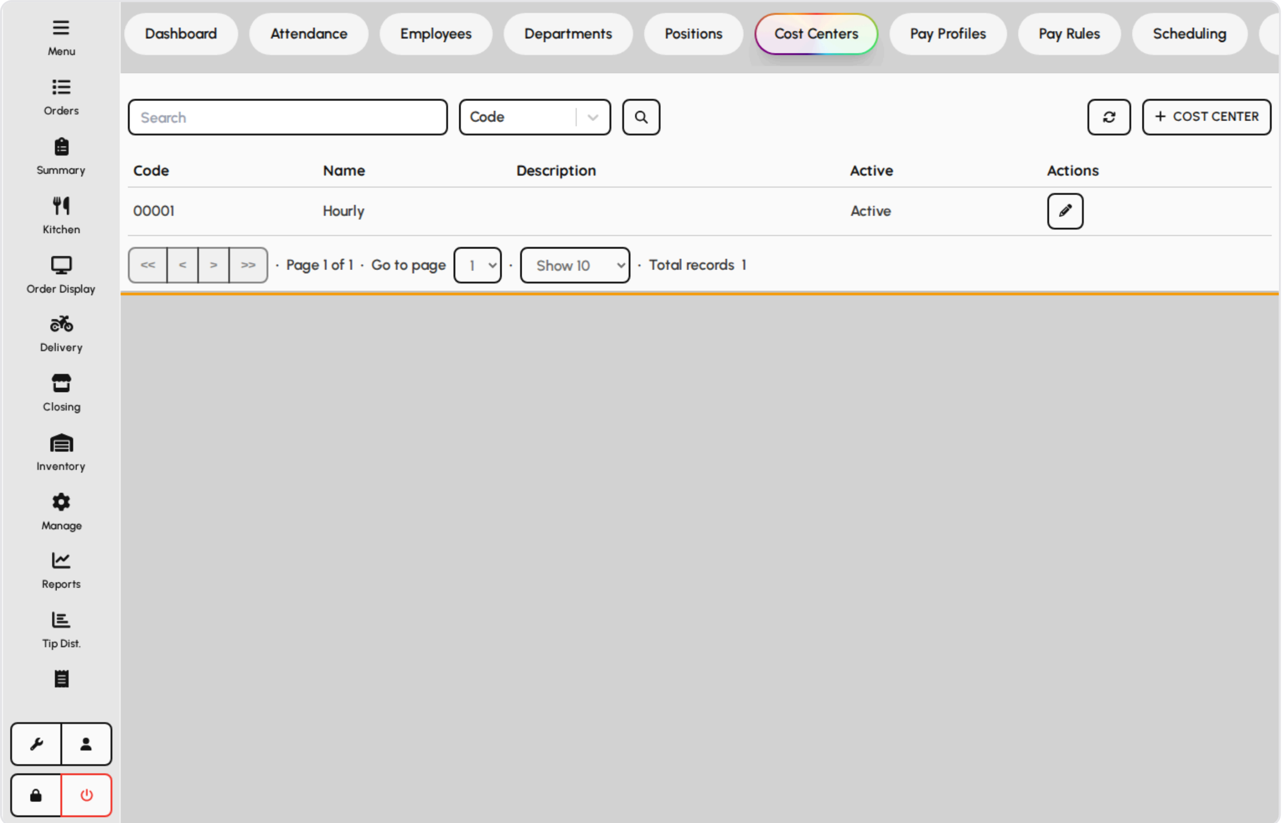
Position form.

Cost centers

Cost centers tag labor and payroll to venues, departments, or GL segments for reporting.

Cost center list

1. Open HR → Cost centers.
2. Review codes used on employees, positions, and schedules.
3. Add or edit centers before assigning them on employee records.



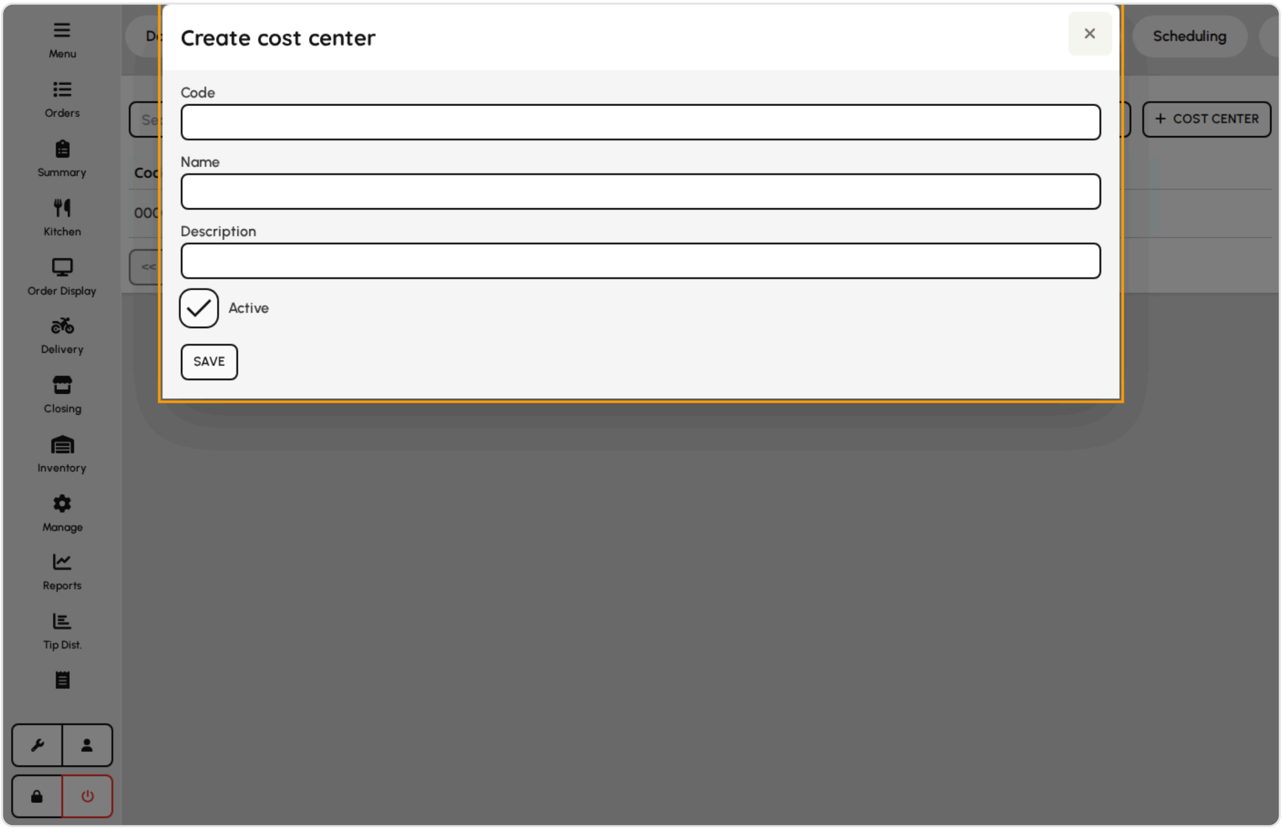
Cost centers tab.

Cost center form

1. Click Add or edit a row.
2. Enter code, name, and optional description.
3. Toggle active to retire a center without deleting history.
4. Save — the center appears on employee and scheduling forms.

Fields

- **Code** — Short unique identifier used in exports and integrations.
- **Name** — Human-readable label in dropdowns.
- **Description** — Optional notes for administrators.
- **Is active** — Inactive centers cannot be selected on new records.



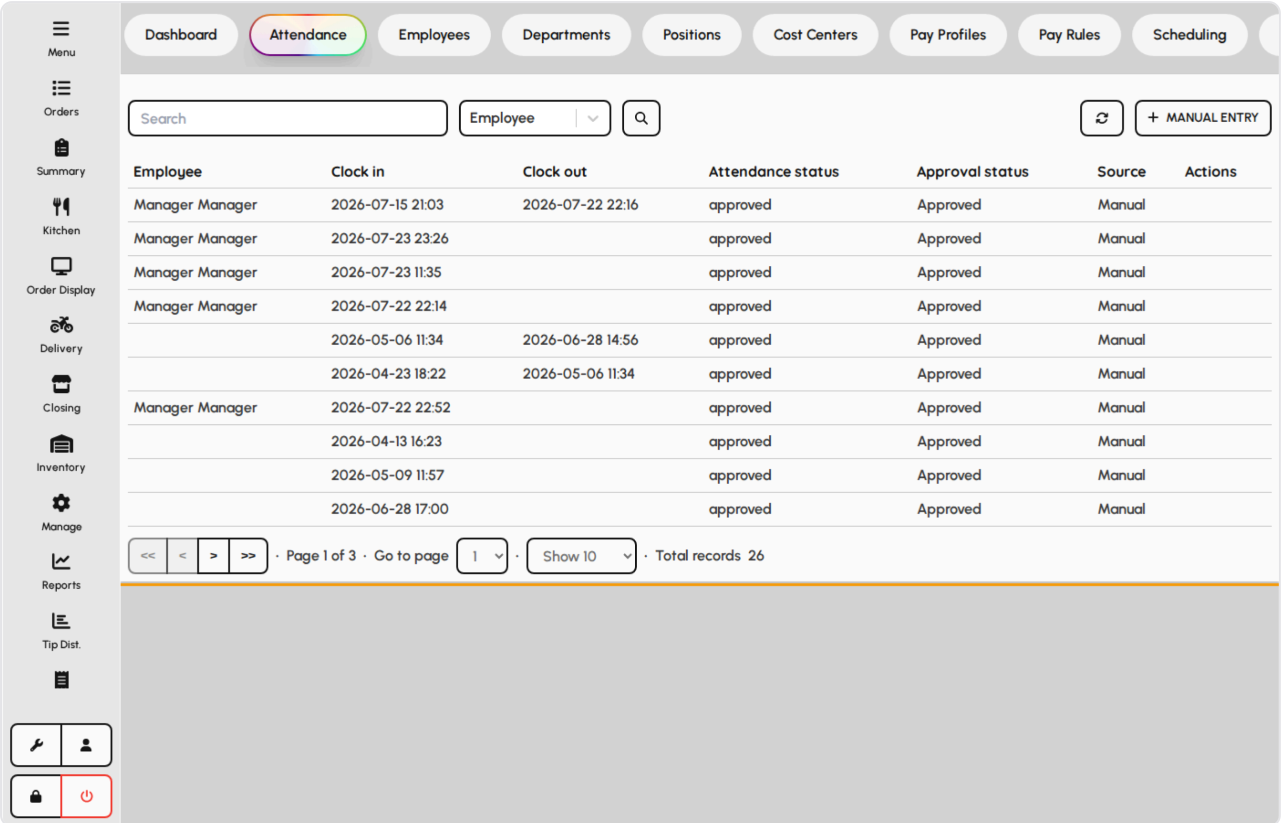
Cost center create/edit modal.

Attendance

Track clock times and build schedules so labor hours stay accurate for payroll and reporting.

Attendance records

1. Open the Attendance tab.
2. Review clock-in and clock-out events for staff.
3. Correct or approve exceptions when your role allows.

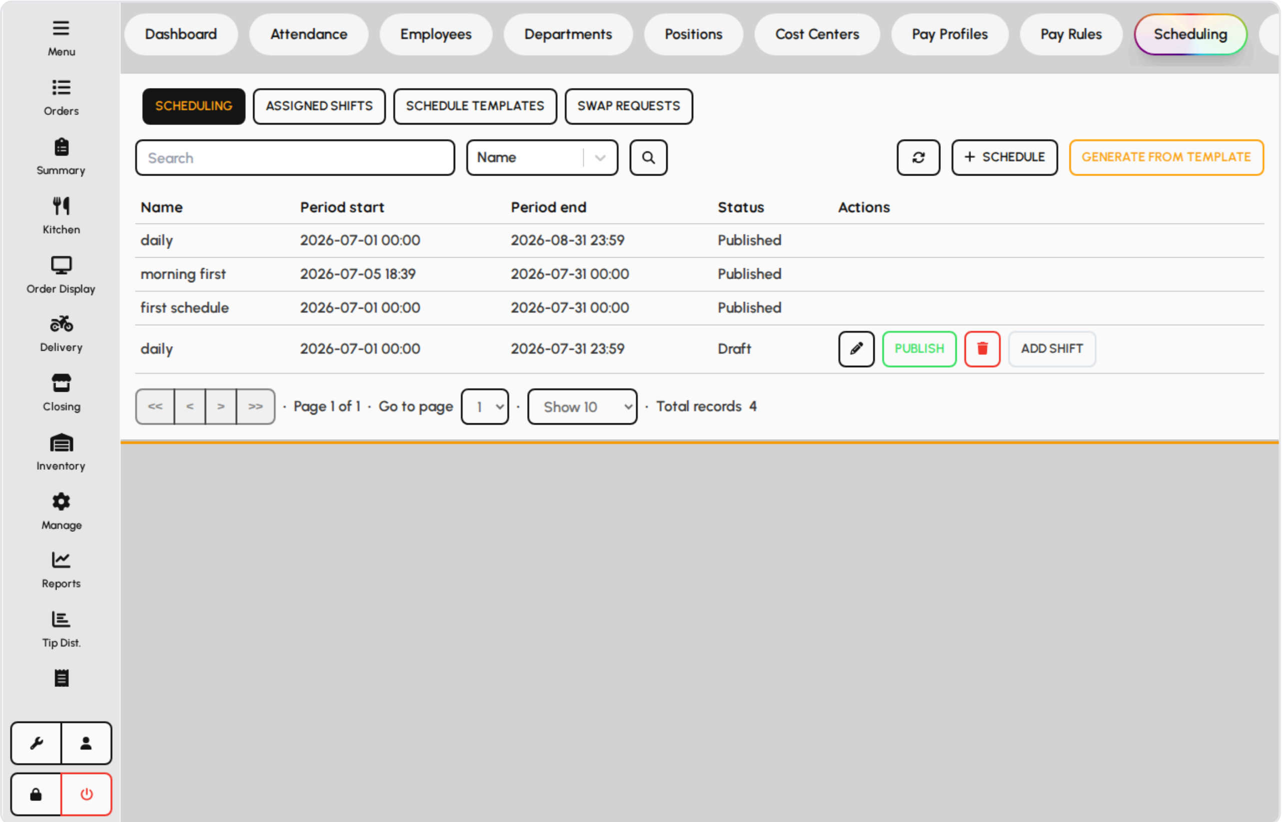


Attendance tab.

Scheduling

Schedules plan who works which shifts.

1. Open the Scheduling tab.
2. Build or adjust shifts for upcoming days.
3. Published schedules guide floor staffing and attendance expectations.



Scheduling tab.

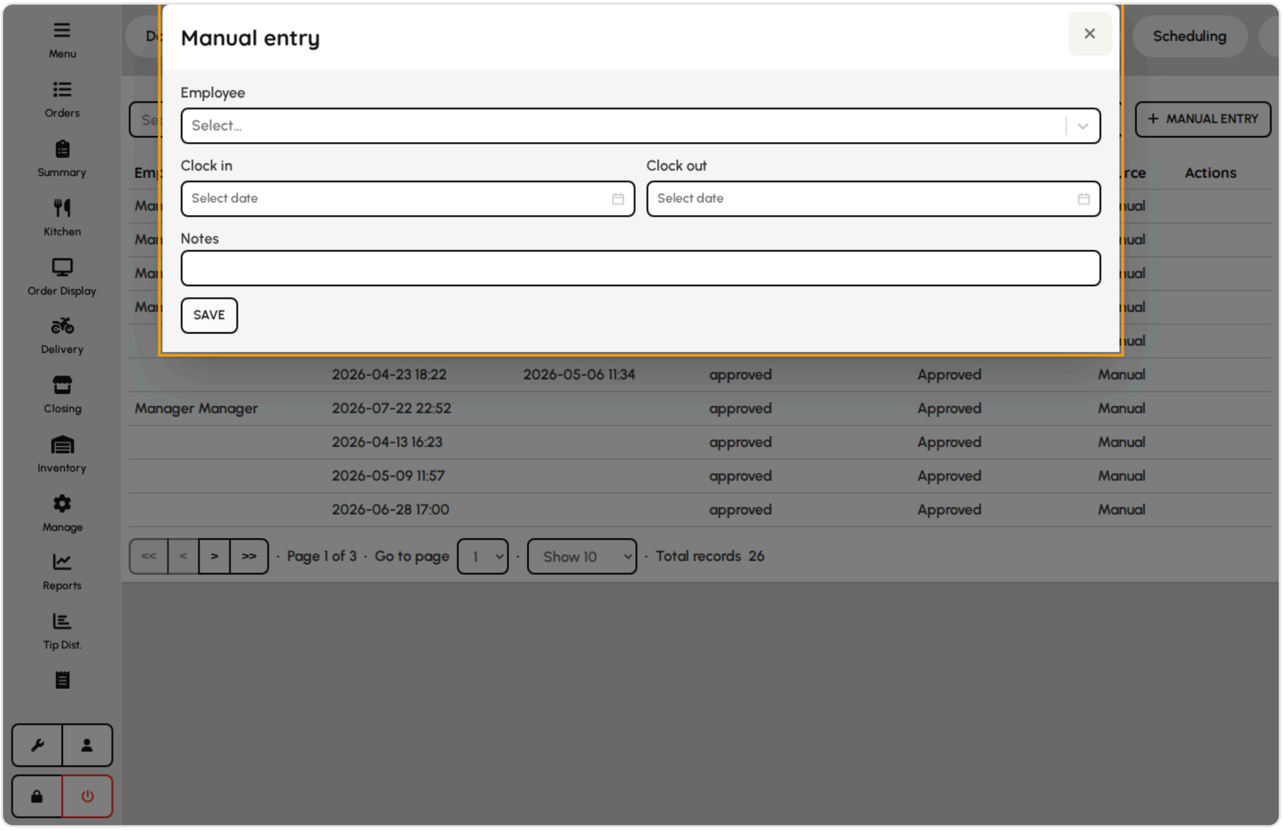
Manual attendance entry

Correct missing punches or backfill time when terminals were unavailable.

1. On Attendance tab click Manual entry.
2. Select employee and enter clock-in and clock-out datetimes.
3. Add notes and save — hours feed payroll and reports.

Fields

- **Employee** — Whose time record is being created or corrected.
- **Clock in** — Start of the worked interval.
- **Clock out** — End of the worked interval; must be after clock in.
- **Notes** — Reason for manual entry on audit trail.



Manual attendance entry modal.

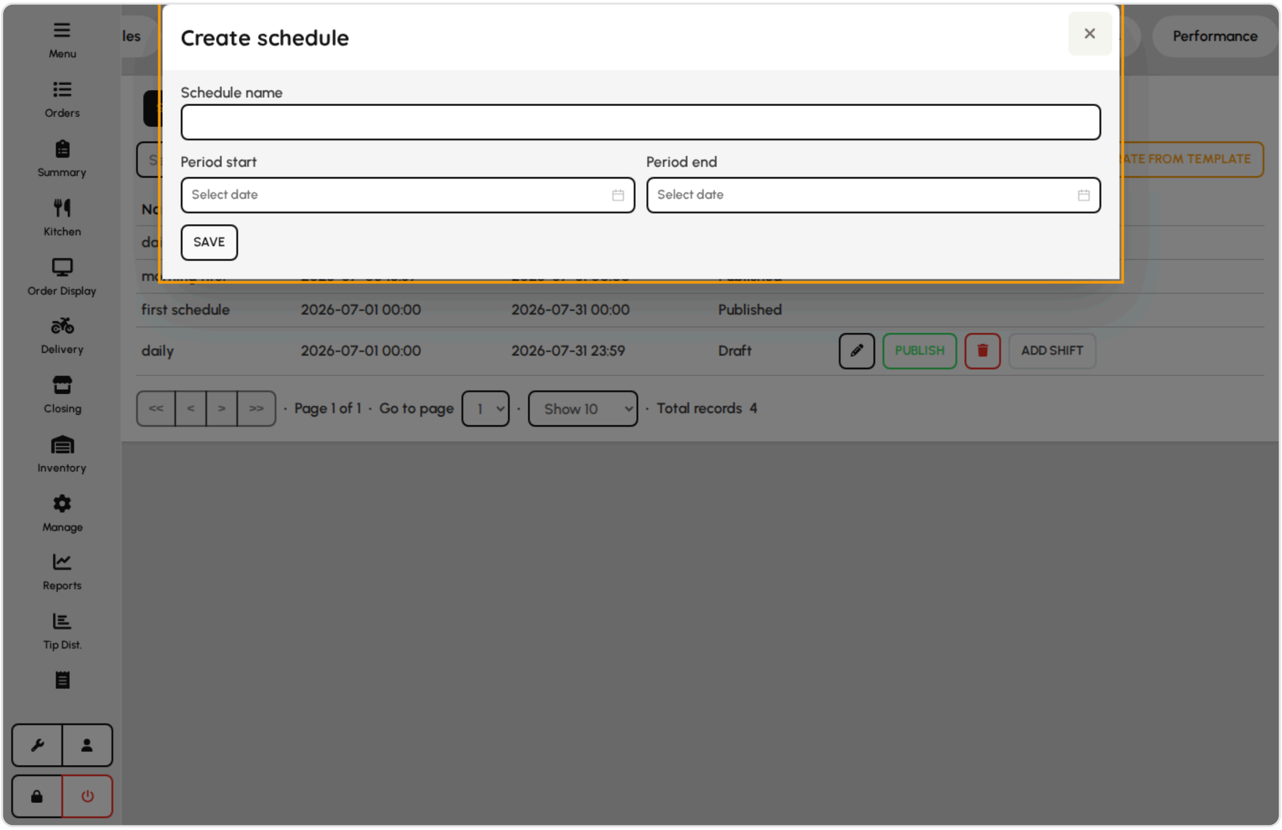
Work schedule form

A schedule is a named date range containing draft or published shifts.

1. Open Scheduling and add a schedule.
2. Set name, period start, and period end.
3. Add shifts or generate from templates while status is draft.

Fields

- **Name** — Label for the schedule period (e.g. Week 12).
- **Period start** — First datetime covered by the schedule.
- **Period end** — Last datetime covered by the schedule.



Work schedule form.

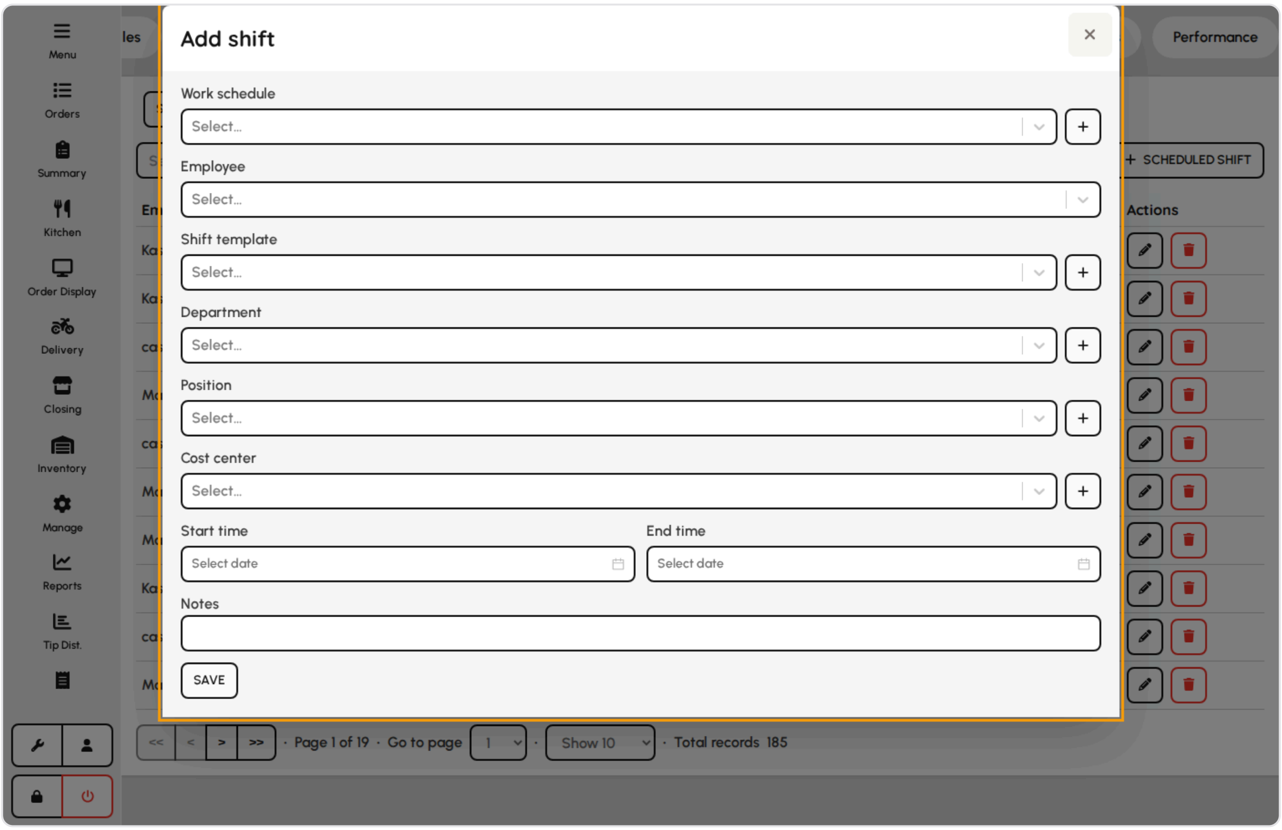
Scheduled shift form

Assigns one employee to a time block within a draft schedule.

1. From a draft schedule click Add shift.
2. Pick work schedule, employee, and start/end times.
3. Optionally apply shift template, department, position, and cost center.
4. Save — conflicts warn if overlaps exist.

Fields

- **Work schedule** — Parent schedule that must be in draft to edit.
- **Employee** — Staff assigned to the shift.
- **Shift template** — Optional preset from Admin → Users → Shifts.
- **Department / position / cost center** — Override org tags for this shift.
- **Start at / end at** — Scheduled clock window.



Scheduled shift form.

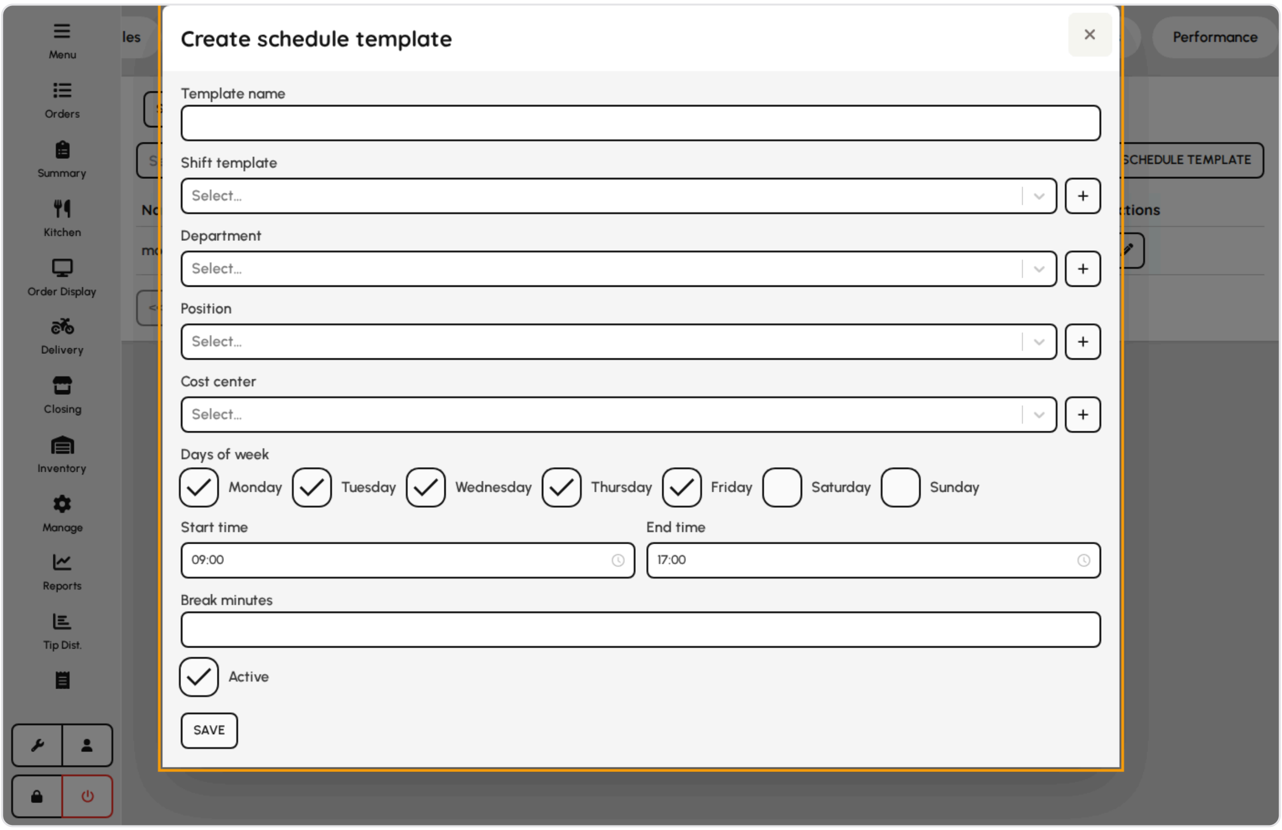
Schedule template form

Reusable weekly pattern used to bulk-generate shifts.

1. Open Templates under Scheduling.
2. Name the template and pick weekdays with start/end times.
3. Optionally link shift template and org defaults.
4. Save for use with Generate schedule.

Fields

- **Name** — Template label in generate dialog.
- **Days of week** — Which weekdays receive shifts.
- **Start / end time** — Daily shift window applied on selected days.
- **Break minutes** — Unpaid break duration subtracted from scheduled hours.
- **Shift template** — Links to POS shift definition for reporting.



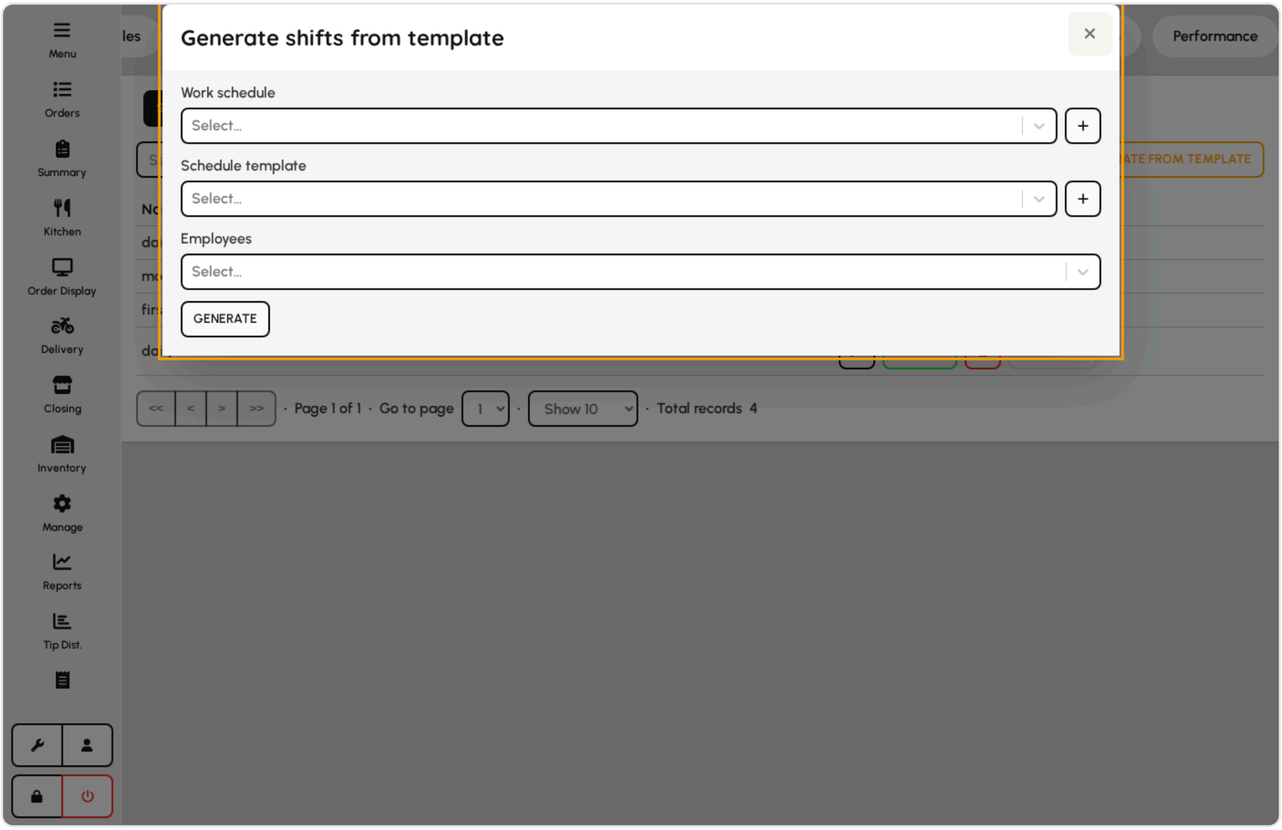
Schedule template form.

Generate schedule from template

1. Click Generate on Scheduling.
2. Select draft work schedule and template.
3. Multi-select employees to receive generated shifts.
4. Generate — creates shifts, skipping conflicts where configured.

Fields

- **Work schedule** — Target draft schedule receiving new shifts.
- **Template** — Weekly pattern defining days and times.
- **Employees** — Staff who each get a copy of the template shifts.



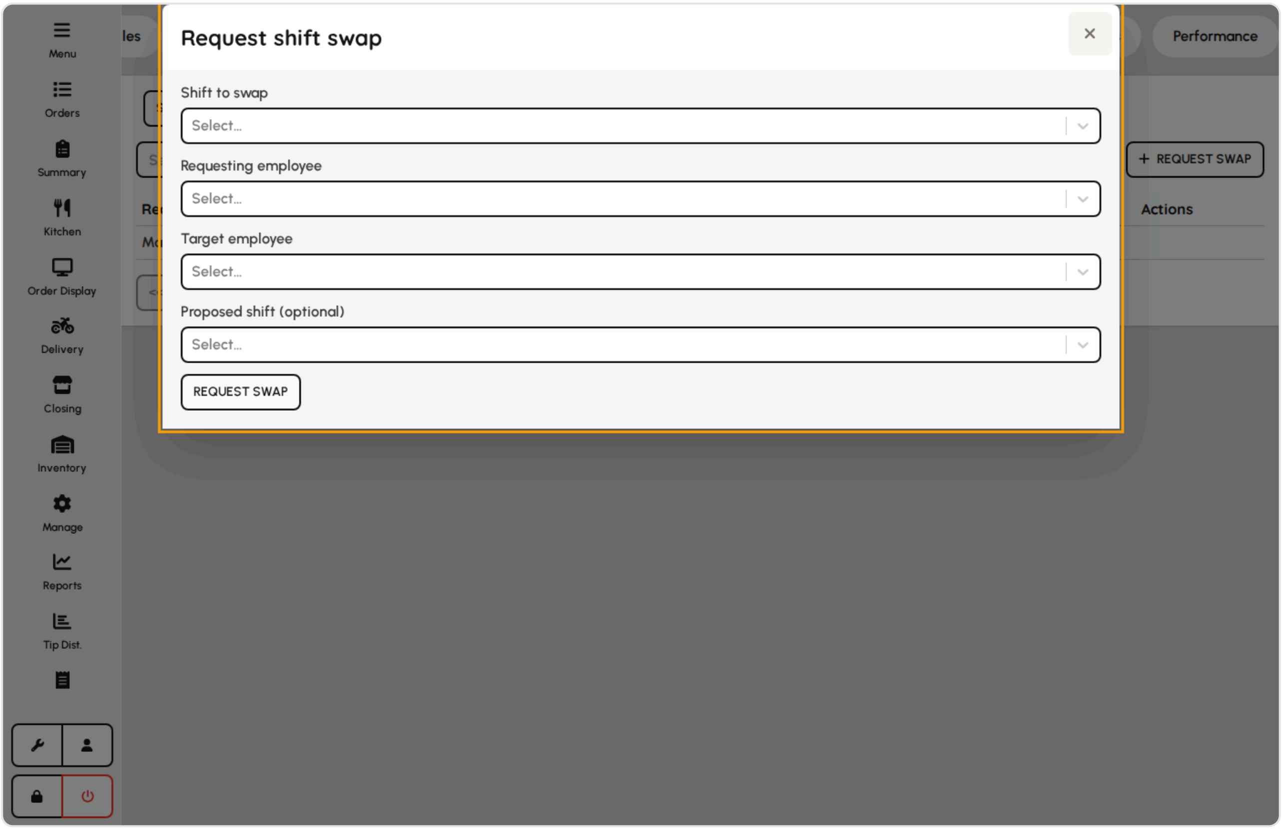
Generate schedule dialog.

Shift swap request

1. Click Request swap on Scheduling.
2. Select the scheduled shift and requesting employee.
3. Optionally name a target employee and proposed swap shift.
4. Submit — creates a pending swap for manager approval.

Fields

- **Scheduled shift** — Shift the requester wants to give up or exchange.
- **Requesting employee** — Employee initiating the swap.
- **Target employee** — Optional coworker to take or exchange the shift.
- **Proposed shift** — Optional counter-shift offered in exchange.



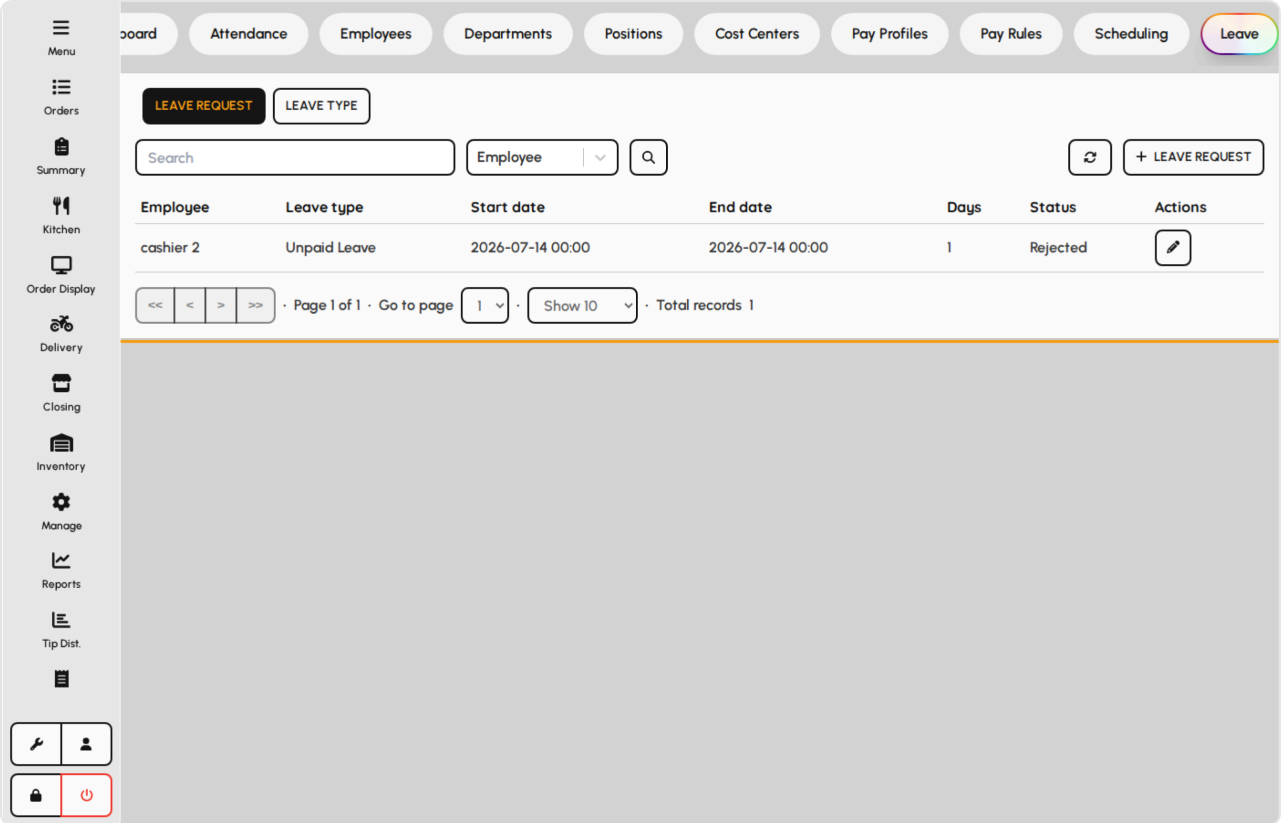
Shift swap request form.

Leave

Manage time-off requests and public holidays that affect schedules and payroll.

Leave requests

1. Open the Leave tab.
2. Review pending and approved leave for employees.
3. Approve or reject requests according to your HR role.

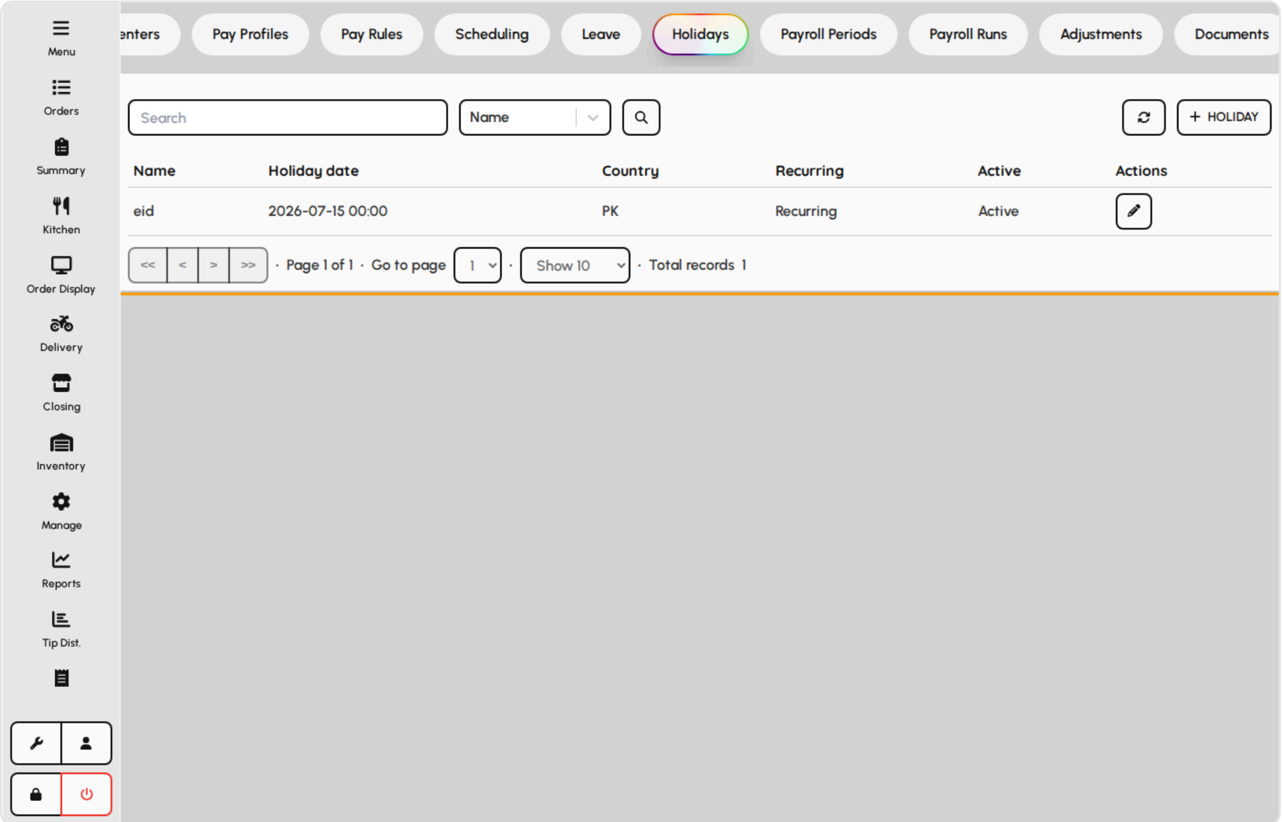


Leave tab.

Holidays

Holidays mark non-working or premium-pay calendar days for the venue.

1. Open the Holidays tab.
2. Add venue holidays for the year.
3. Holiday dates feed scheduling and pay-rule calculations when configured.



Holidays tab.

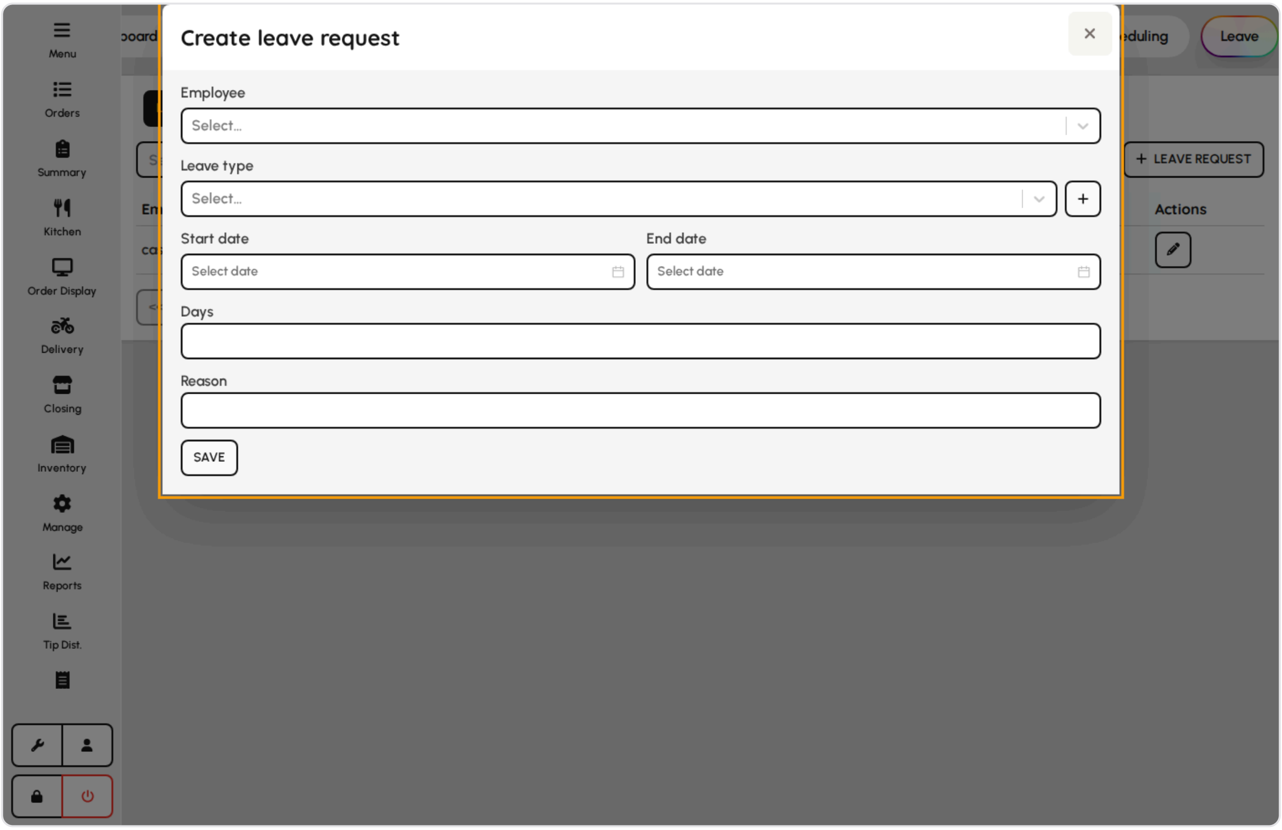
Leave request form

Submit or edit time-off requests against configured leave types.

1. On Leave tab click Add request.
2. Select employee, leave type, and date range.
3. Enter day count and reason if required by the type.
4. Save — routes for approval when the type requires it.

Fields

- **Employee** — Staff requesting time off.
- **Leave type** — Determines paid/unpaid, approval, and accrual rules.
- **Start / end date** — Inclusive dates of the absence.
- **Days** — Working days consumed (may auto-calculate).
- **Reason** — Optional note for approvers.



Leave request form.

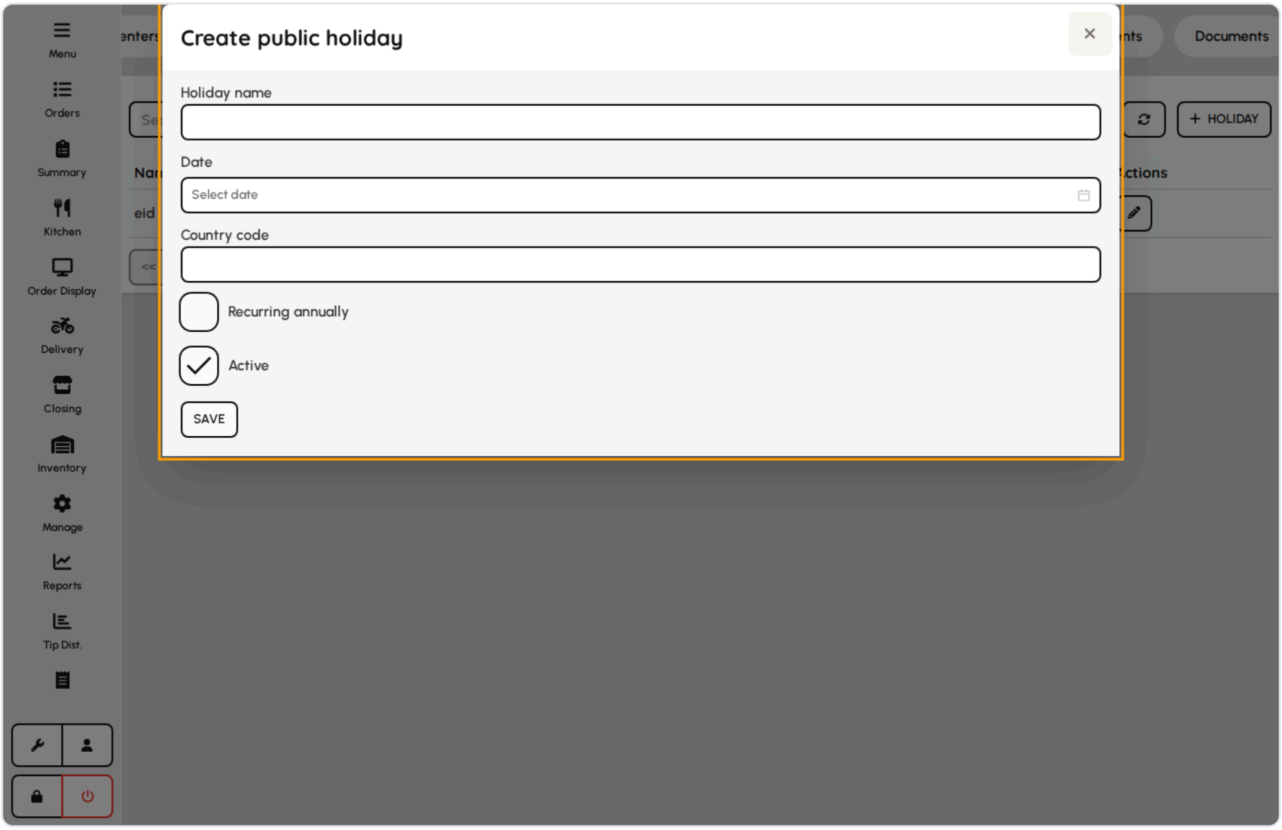
Public holiday form

Public holidays interact with pay rules and scheduling.

1. Open Holidays under Leave.
2. Add name, date, and country code.
3. Mark recurring for annual fixed dates.
4. Save — holiday appears in pay rule filters.

Fields

- **Name** — Holiday label in calendars and rules.
- **Date** — Calendar date observed.
- **Country code** — Optional ISO code for multi-country venues.
- **Is recurring** — Repeats every year on the same month/day.
- **Is active** — Inactive holidays are ignored by new rules.



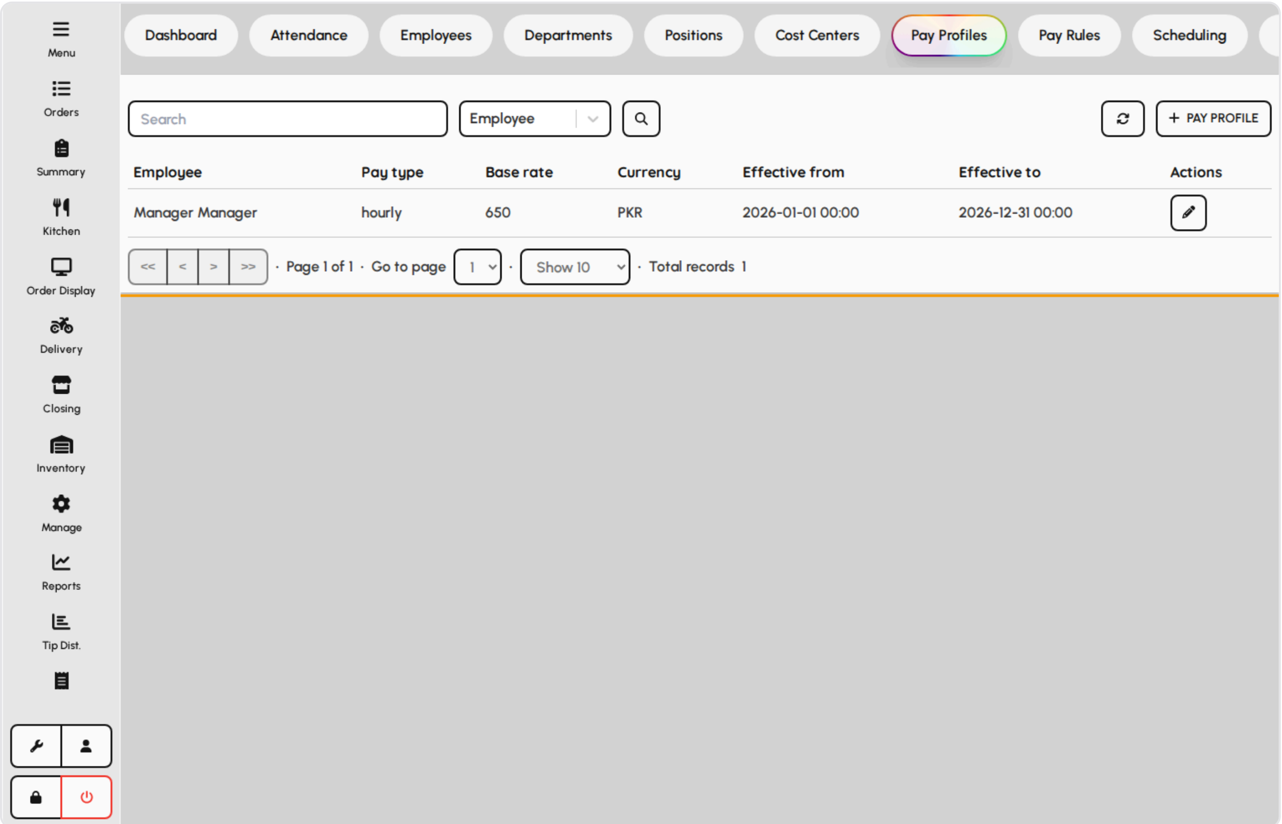
Public holiday form.

Pay profiles & rules

Pay profiles store base rates per employee; pay rules apply premiums, bonuses, and deductions by schedule or context.

Pay profiles

1. Open HR → Pay → Profiles.
2. Maintain effective-dated base pay per employee.
3. Profiles feed payroll calculation for the active period.



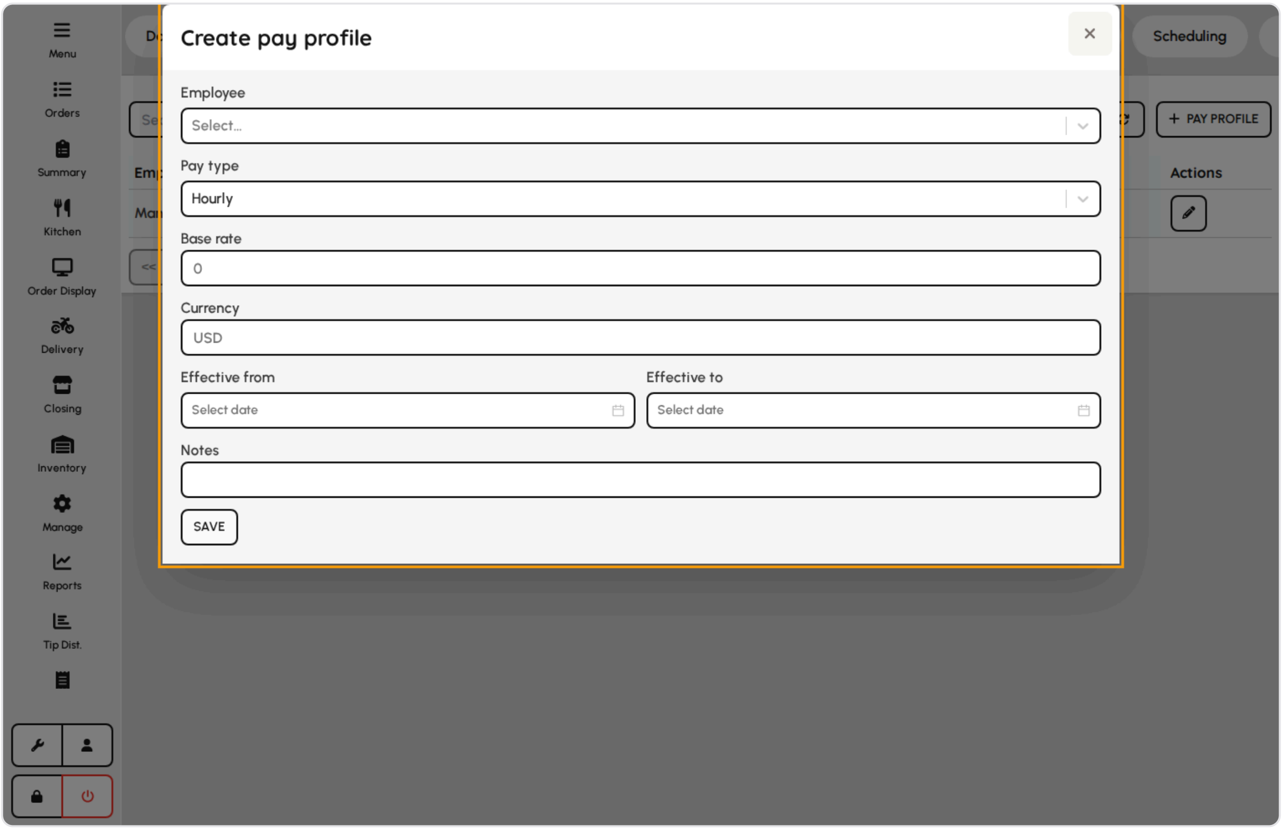
Employee pay profiles list.

Pay profile form

1. Add or edit a profile for an employee.
2. Choose pay type and base rate with effective dates.
3. Save — payroll uses the profile valid on each work date.

Fields

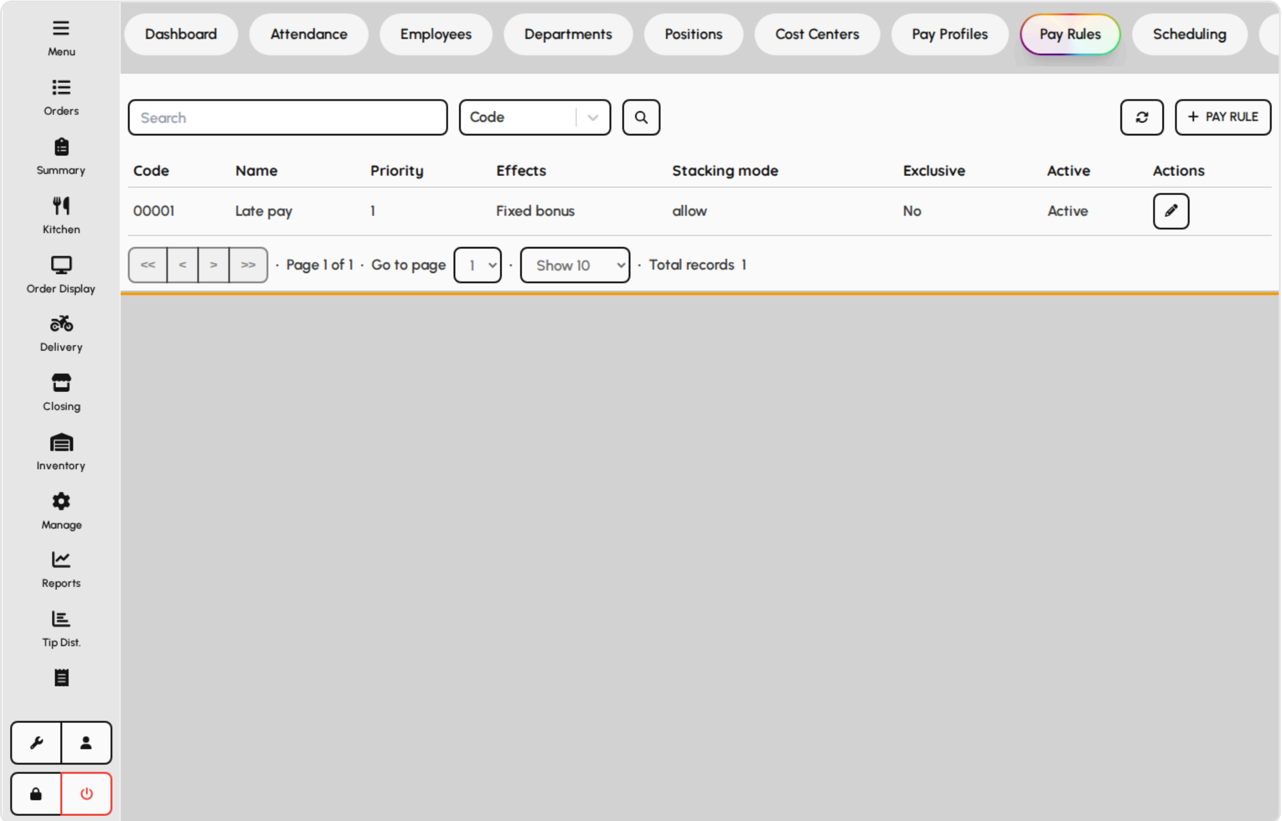
- **Employee** — Staff member receiving this base compensation.
- **Pay type** — Hourly, salary, contract, commission, or mixed — drives payroll math.
- **Base rate** — Primary rate or salary amount in the chosen currency.
- **Currency** — ISO currency for the rate.
- **Effective from** — First day this profile applies.
- **Effective to** — Optional end date when superseded by a newer profile.



Pay profile form.

Pay rules

1. Open Pay → Rules.
2. Rules stack by priority with modes: allow, prevent, highest wins, or priority.
3. Target employees, departments, holidays, or time windows.



Labor pay rules list.

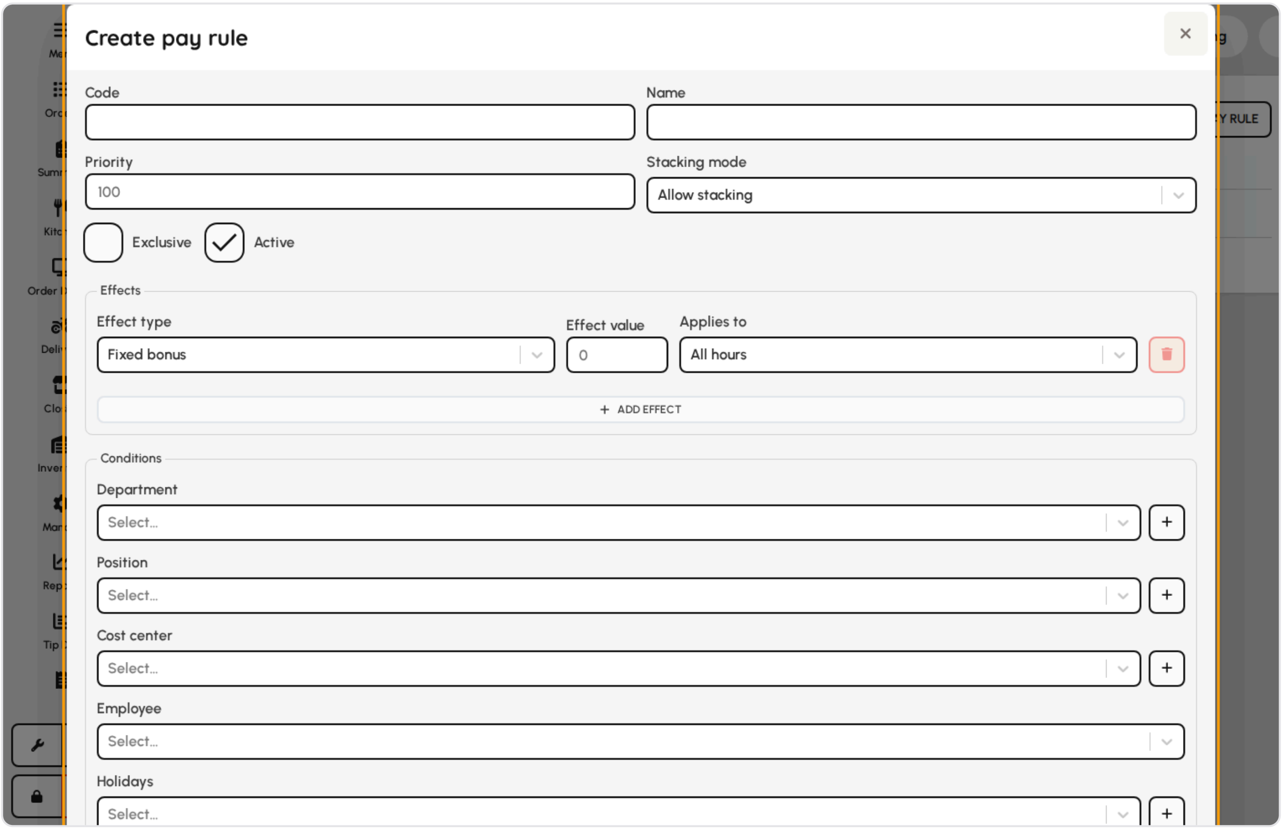
Pay rule form

Each rule has one or more effects (multiplier, fixed bonus/deduction, percent bonus/deduction) and eligibility filters.

1. Add or edit a rule with code and name.
2. Define effects and whether they apply to regular, overtime, or all hours.
3. Set date, time, weekday, and holiday filters.
4. Assign employees, departments, positions, or cost centers.
5. Save — the payroll engine evaluates rules when clocked hours are calculated.

Fields

- **Code** — Unique rule identifier for exports.
- **Name** — Descriptive label in admin lists.
- **Priority** — Order when stacking mode is priority.
- **Stacking mode** — How this rule interacts with other matching rules.
- **Effects** — Multiplier or amount adjustments applied to qualifying hours.
- **Employee / department / position / cost center filters** — Limits which staff the rule can affect.
- **Date and time window** — Optional start/end date and daily time range.
- **Days of week / months** — Restricts rule to selected calendar patterns.
- **Holidays** — Apply only on selected public holidays.
- **After hours (day/week)** — Triggers when daily or weekly hour thresholds are exceeded.



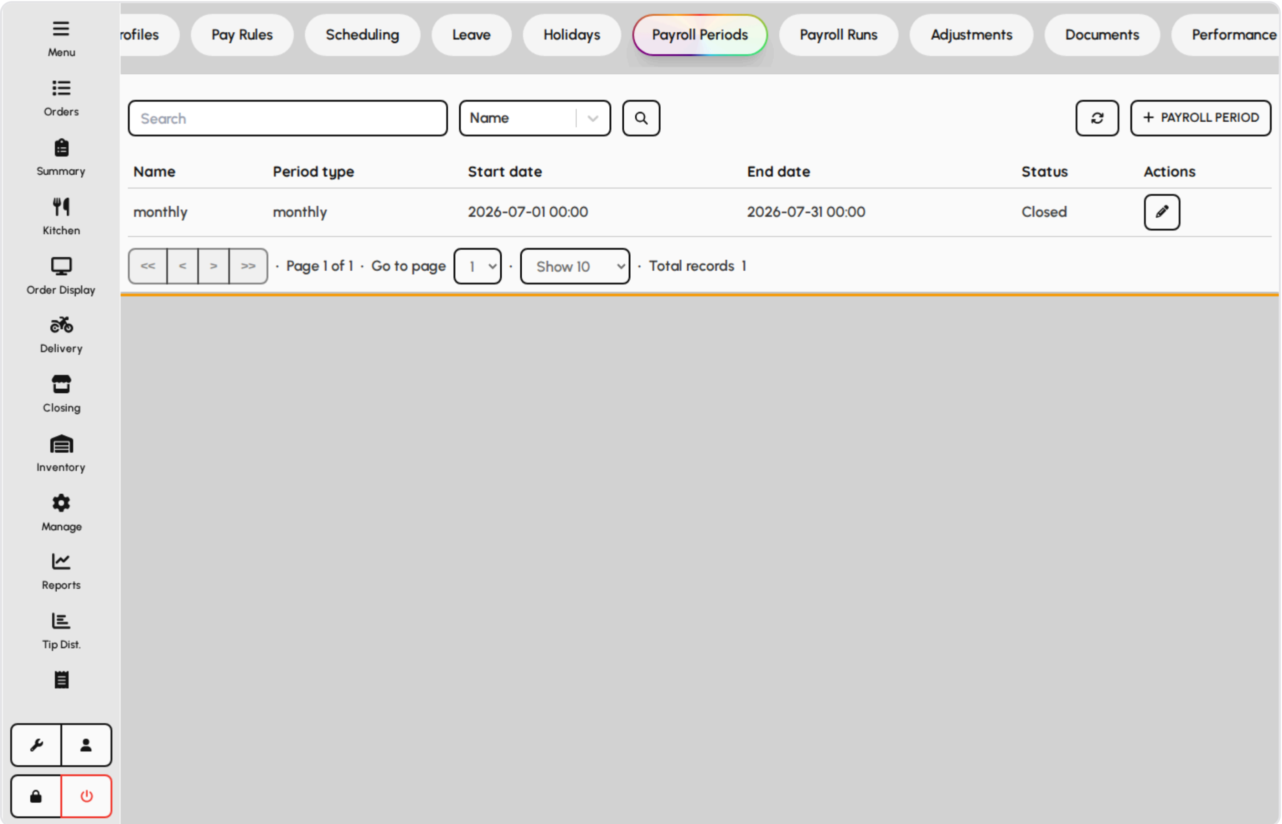
Pay rule form with effects and filters.

Payroll periods & runs

Close labor into payroll periods, generate runs with previews, and post adjustments.

Payroll periods

1. Open HR → Payroll → Periods.
2. Create periods matching your pay cycle (weekly, biweekly, monthly, custom).
3. Lock or close periods before final runs.



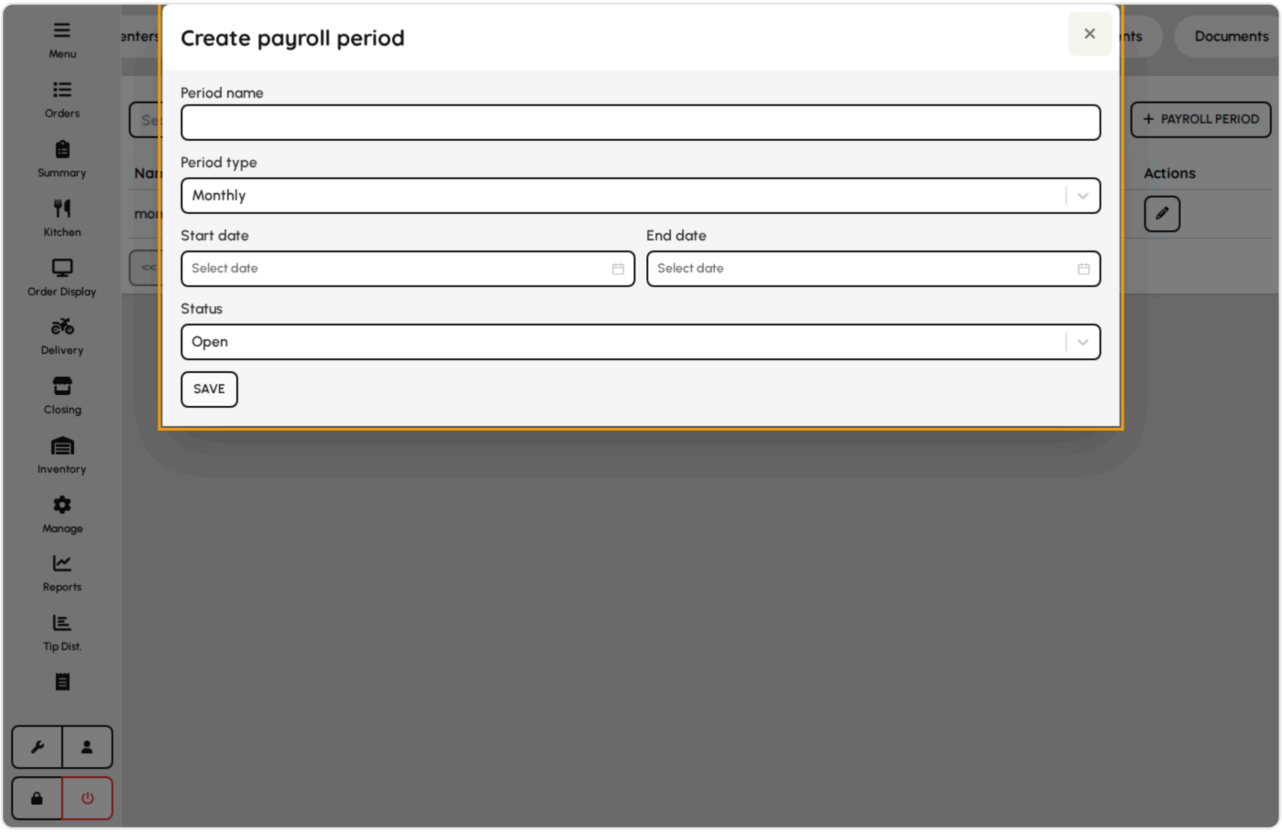
Payroll periods list.

Payroll period form

1. Add a period with name, type, and date range.
2. Leave status Open while collecting time and adjustments.
3. Change to Locked/Closed/Paid as the cycle progresses.

Fields

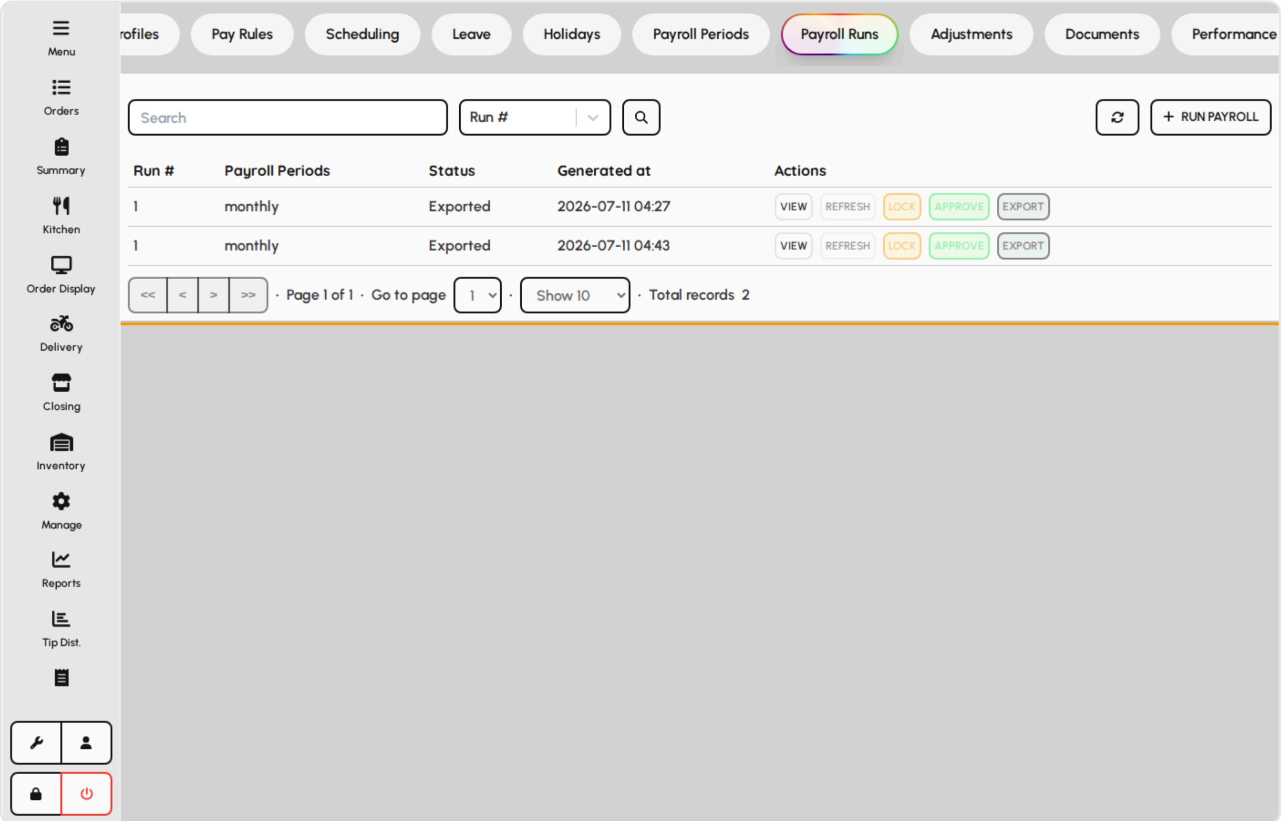
- **Period name** — Label shown on runs and payslip exports.
- **Period type** — Weekly, biweekly, monthly, or custom cadence.
- **Start date** — First day included in the period.
- **End date** — Last day included in the period.
- **Status** — Open allows edits; locked/closed restrict changes; paid marks completion.



Payroll period form.

Payroll runs

1. Open Payroll → Runs for an open period.
2. Generate a run to preview gross pay from attendance and rules.
3. Review snapshots before marking the run complete.



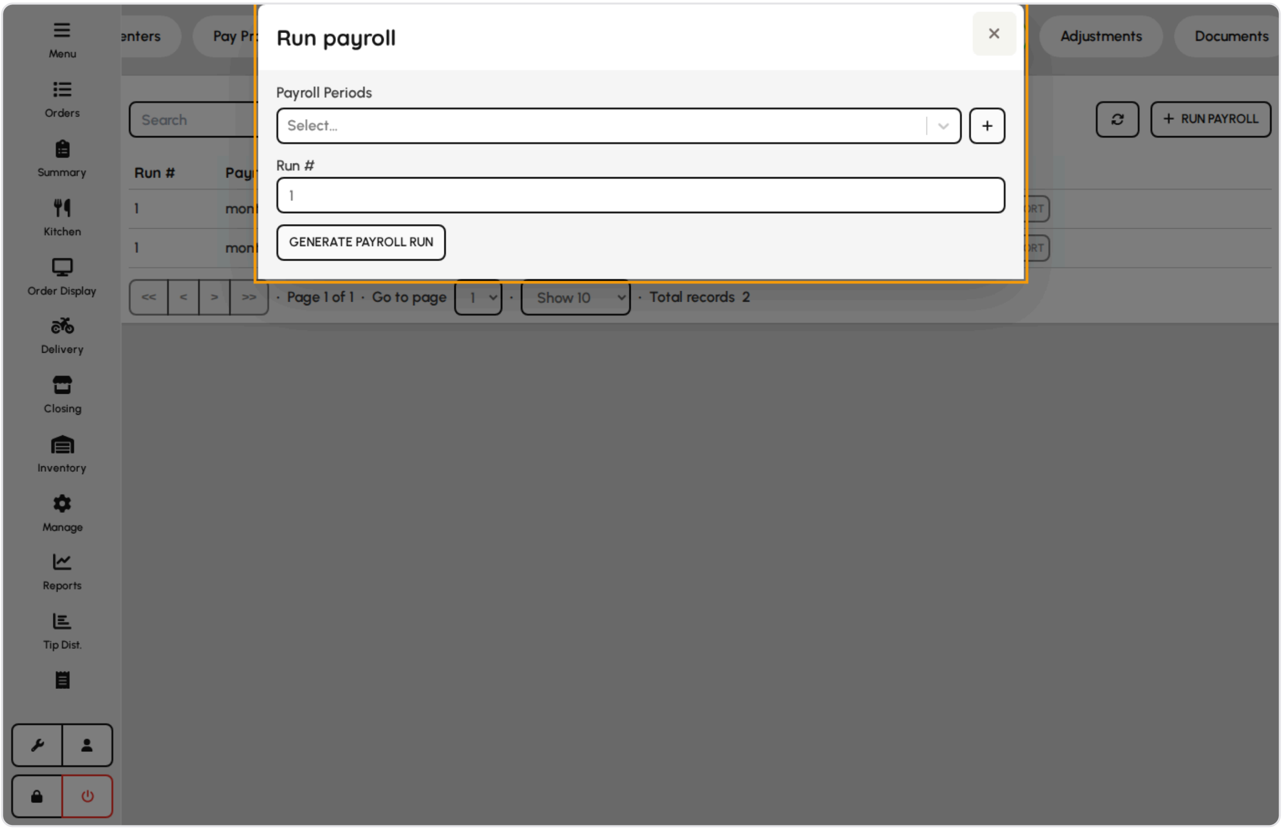
Payroll runs for a period.

Generate payroll run

1. Click New run and select an open payroll period.
2. Confirm the auto-suggested run number.
3. Generate preview to calculate lines from time, profiles, and rules.

Fields

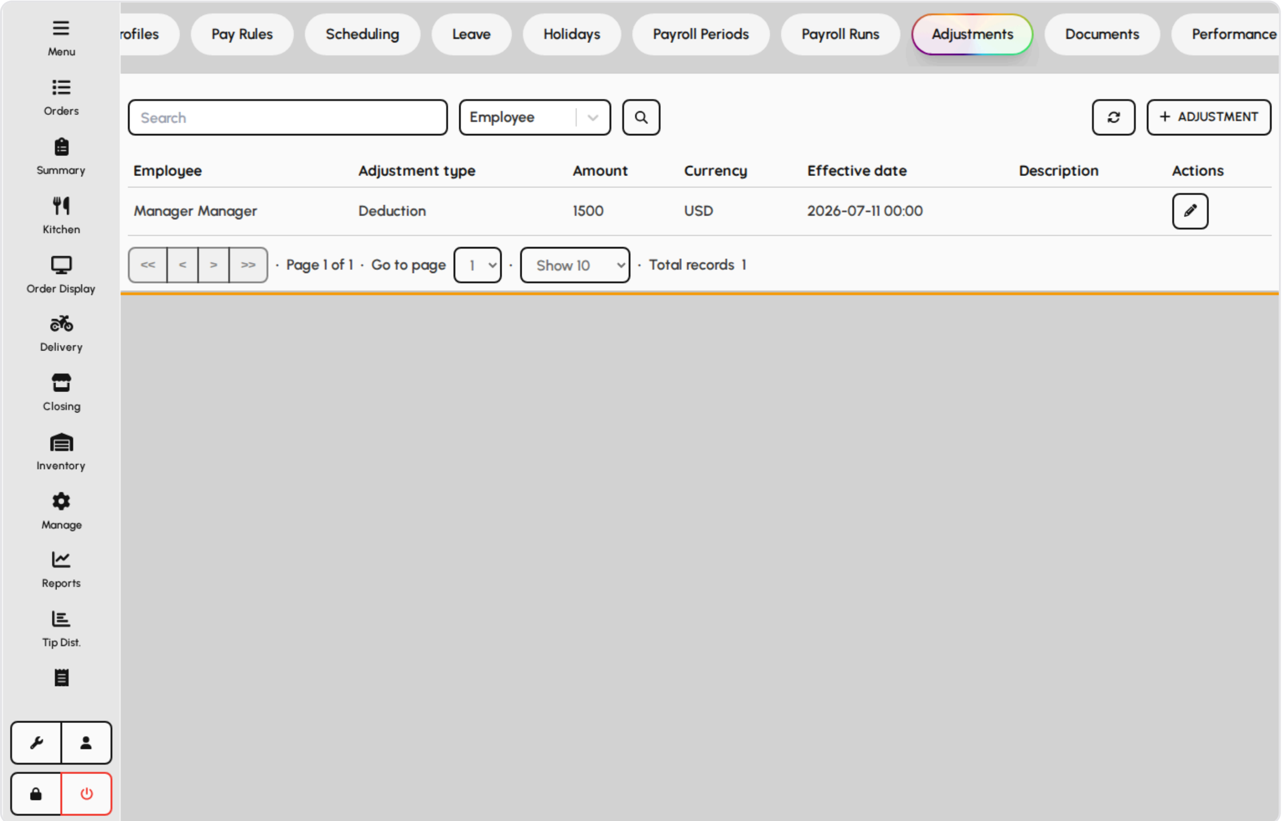
- **Payroll period** — Date range and status governing which hours and adjustments are included.
- **Run number** — Sequential identifier for multiple previews within the same period.



New payroll run form.

Payroll adjustments

1. Open Payroll → Adjustments.
2. Add bonuses, penalties, allowances, or corrections per employee.
3. Link to a payroll period when the amount should appear on a run.



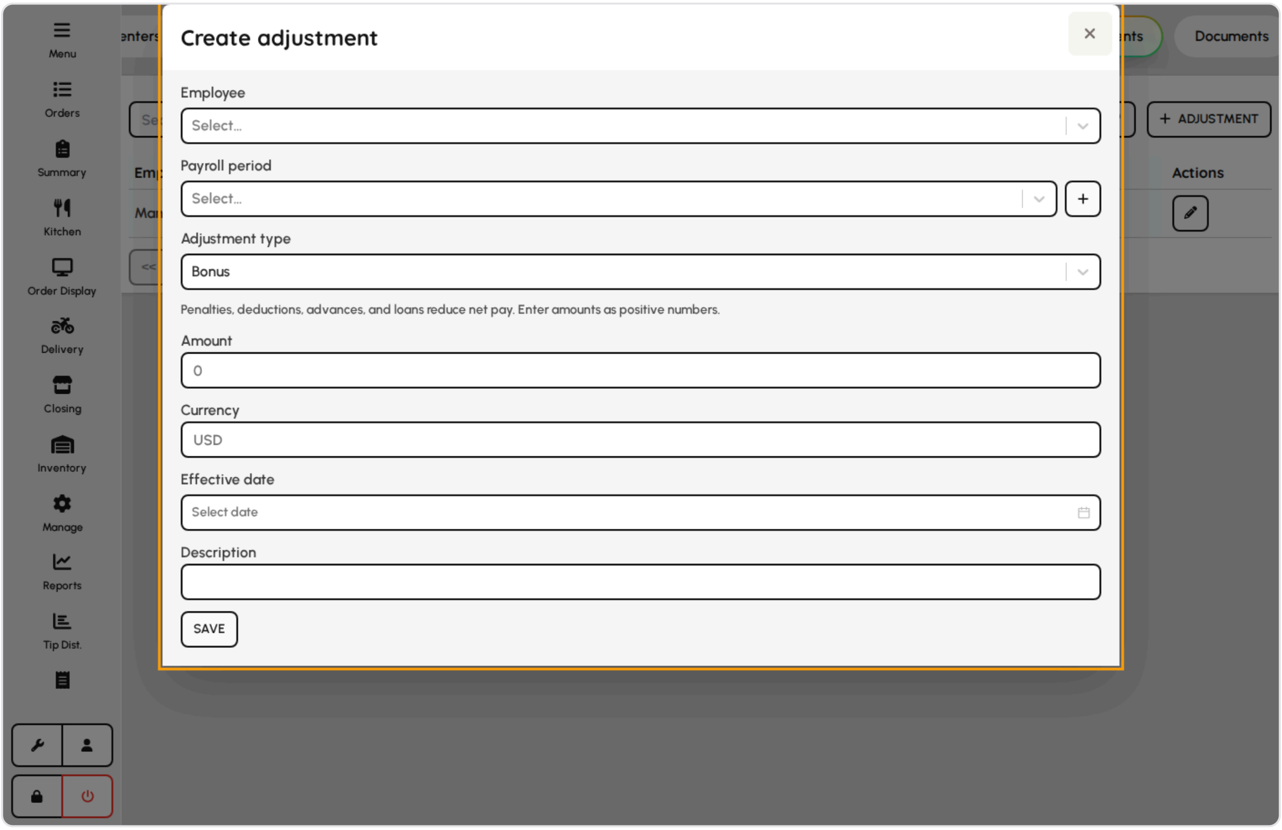
Labor adjustments list.

Adjustment form

1. Choose employee, type, amount, and effective date.
2. Optionally tie to a payroll period.
3. Save — included on the next run covering that date.

Fields

- **Employee** — Staff receiving the adjustment.
- **Payroll period** — Optional link so the amount rolls into a specific run.
- **Type** — Bonus, penalty, allowance, reimbursement, advance, loan, correction, or deduction.
- **Amount** — Currency value added or subtracted from gross pay.
- **Effective date** — Date used to determine which run picks up the adjustment.
- **Description** — Explanation on payslip detail and audit trail.



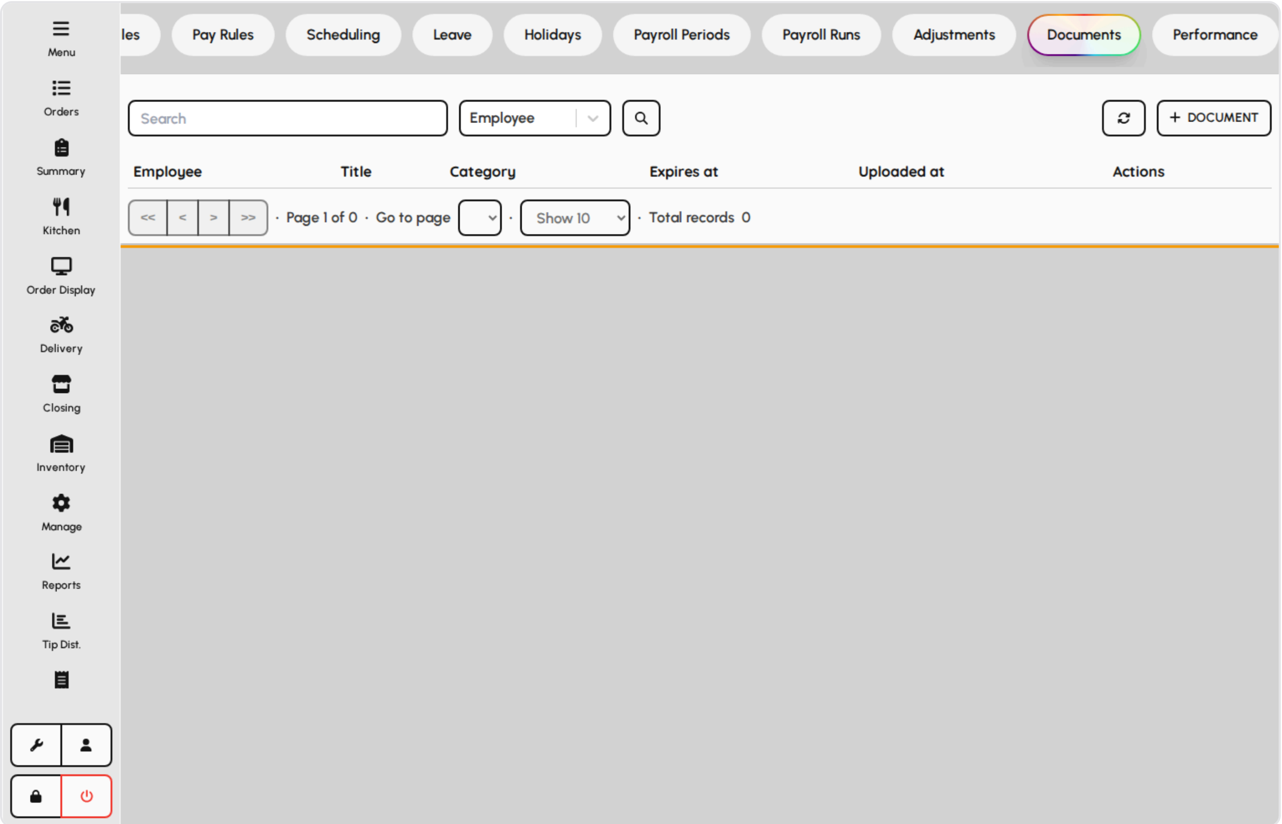
Payroll adjustment form.

Employee documents

Store contracts, IDs, licenses, and other files against employee records with expiry tracking.

Documents list

1. Open HR → Documents.
2. Filter by employee or category.
3. Upload new files or update metadata on existing documents.



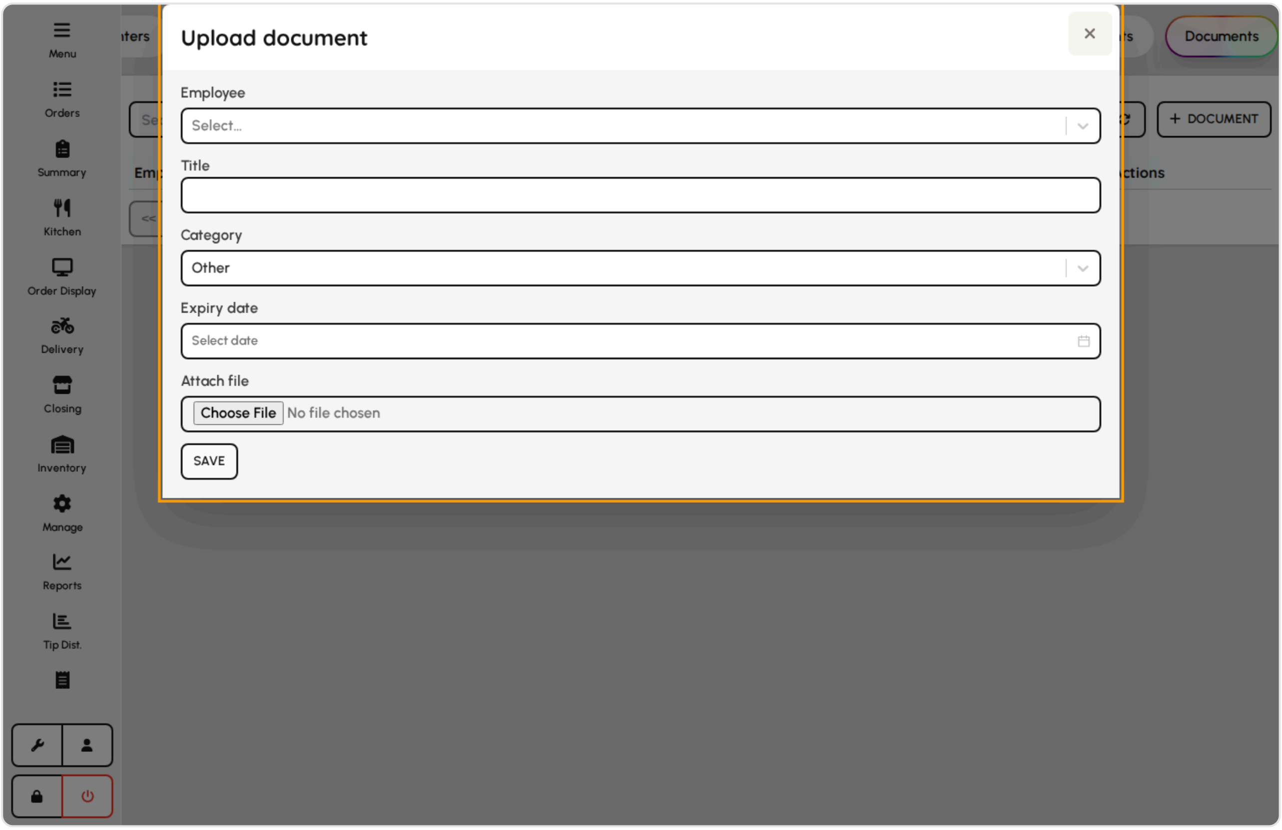
Employee documents tab.

Document form

1. Click Add document.
2. Select employee, title, and category.
3. Attach the file and set expiry if applicable.
4. Save — file is stored and linked to the employee profile.

Fields

- **Employee** — Owner of the document record.
- **Title** — Display name in lists and reminders.
- **Category** — Contract, certificate, license, ID, medical, warning, or other.
- **Expires at** — Optional date for renewal alerts.
- **Attach file** — Required on create; stores the binary in the document library.



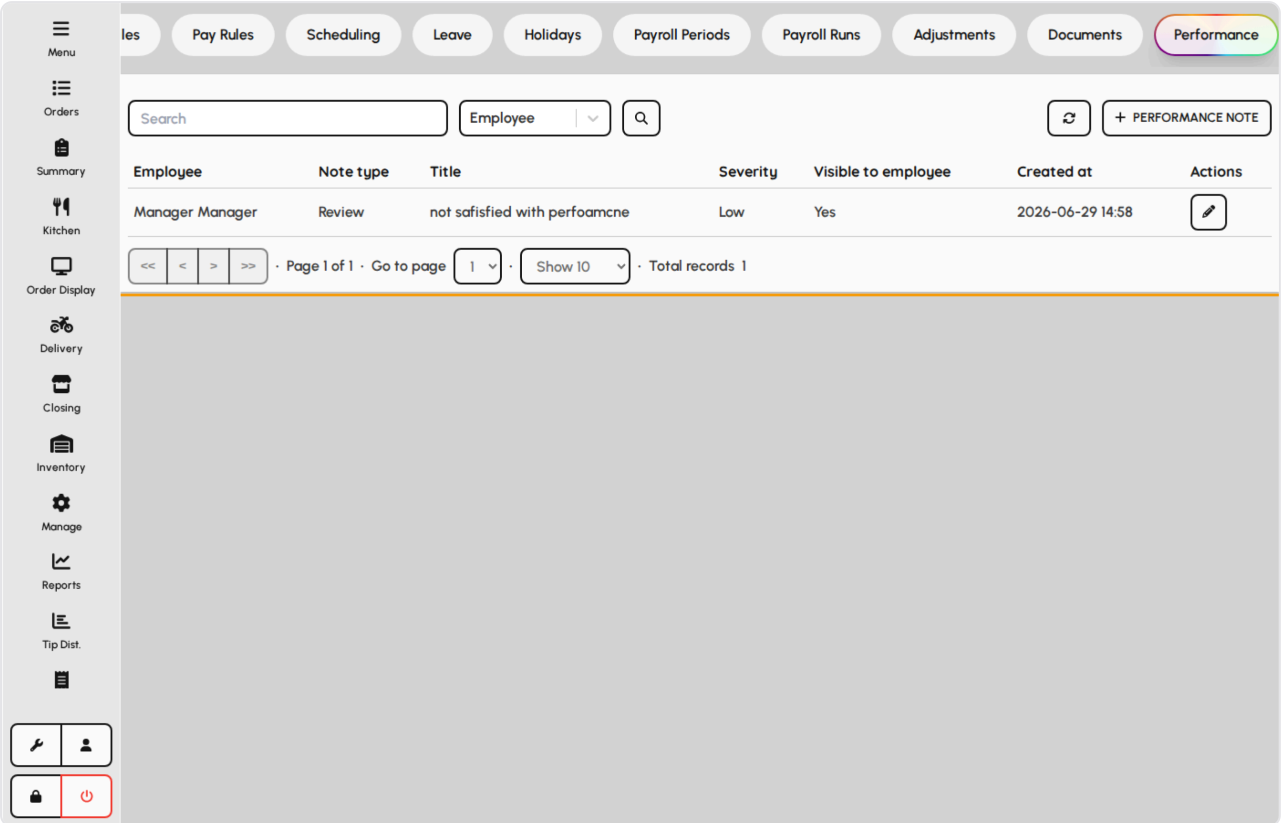
Employee document upload form.

Performance notes

Record warnings, compliments, reviews, and incidents on employee files.

Performance list

1. Open HR → Performance.
2. Browse notes by employee, type, and severity.
3. Add entries after incidents or scheduled reviews.



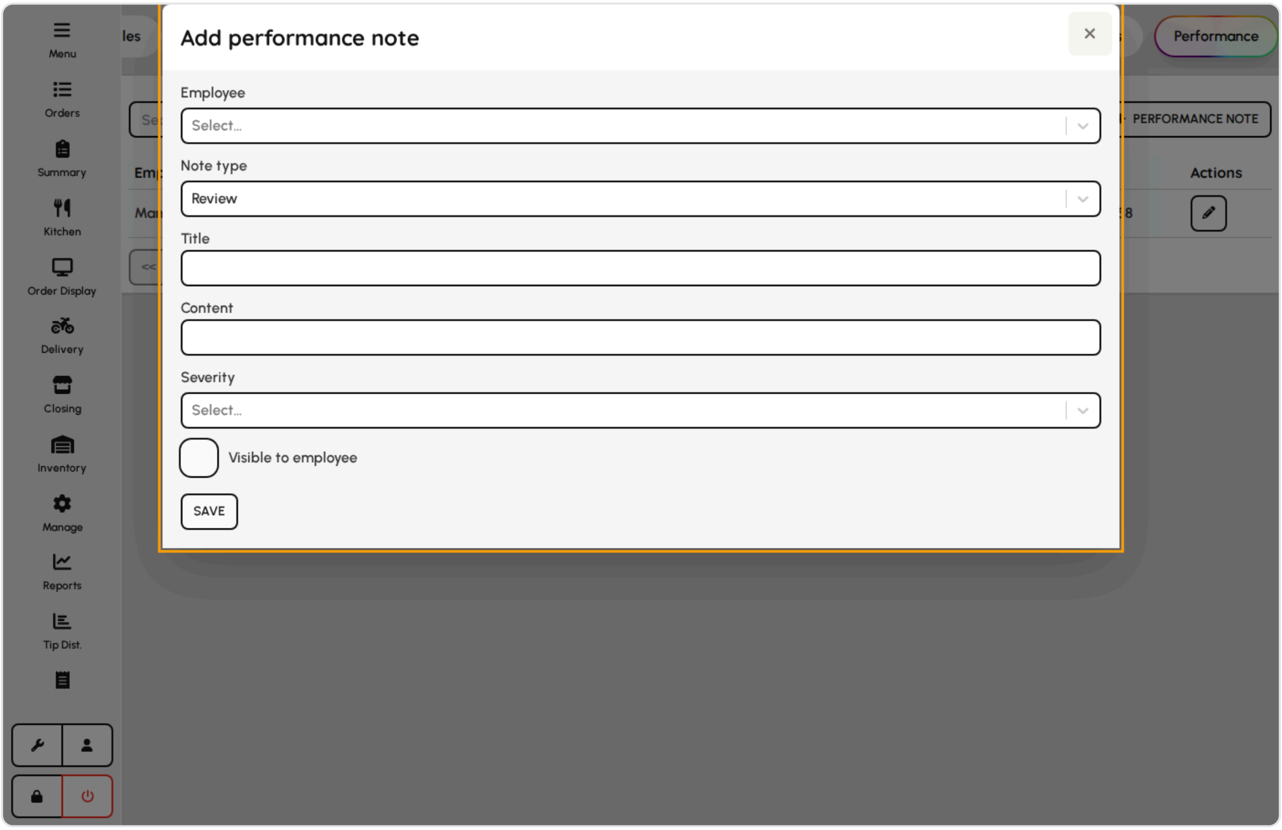
Performance notes tab.

Performance note form

1. Choose employee, type, title, and body text.
2. Set severity for incidents and warnings.
3. Toggle visible to employee if staff may view the note in self-service.
4. Save to append the note to the HR file.

Fields

- **Employee** — Subject of the note.
- **Type** — Warning, compliment, review, or incident.
- **Title** — Short summary in lists.
- **Content** — Full narrative of the event or review.
- **Severity** — Low, medium, high, or critical — mainly for warnings and incidents.
- **Visible to employee** — When enabled, the note may be shown to the employee user.



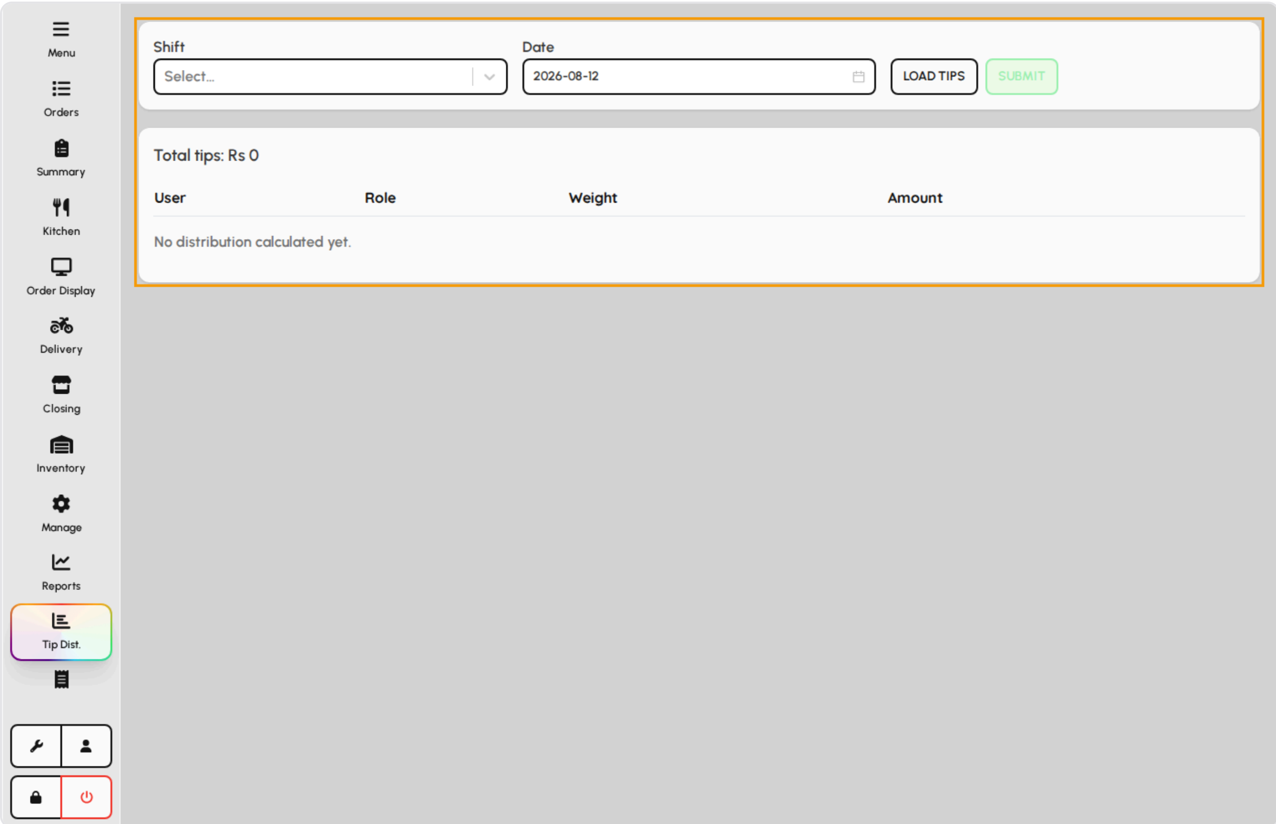
Performance note form.

Tip distribution

Tip distribution calculates how pooled tips for a shift should be split across staff using configured weights, then saves an official distribution record. Managers often use the same screen from Tip distribution in the sidebar.

Tip distribution screen

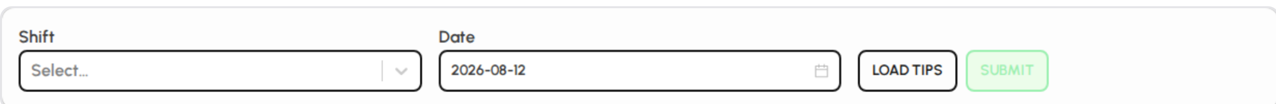
1. Tap Tip distribution in the sidebar.
2. Select a shift and business date at the top.
3. Load tips calculates totals from paid orders in that shift window.



Tip distribution screen.

Shift and date

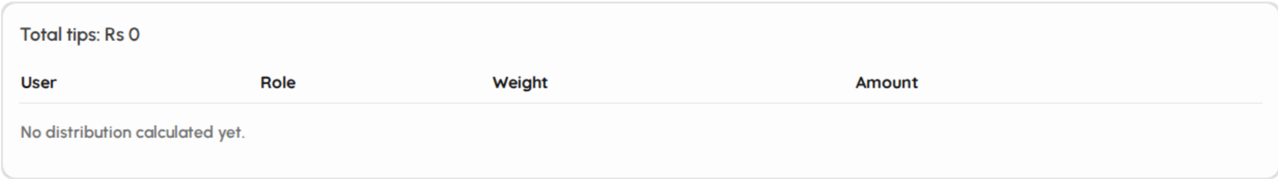
1. Choose the shift from the dropdown.
2. Pick the date — cannot be in the future.
3. Tap Load tips to fetch tip totals and build the distribution table.



Shift, date, and load controls.

Distribution table

1. Total tips shows the pooled amount for the shift.
2. Each row lists user, role, weight, and calculated share.
3. Submit saves the distribution after you review the shares.



Totals and per-user distribution table.