

How do I onboard new Employees for Scheduling?

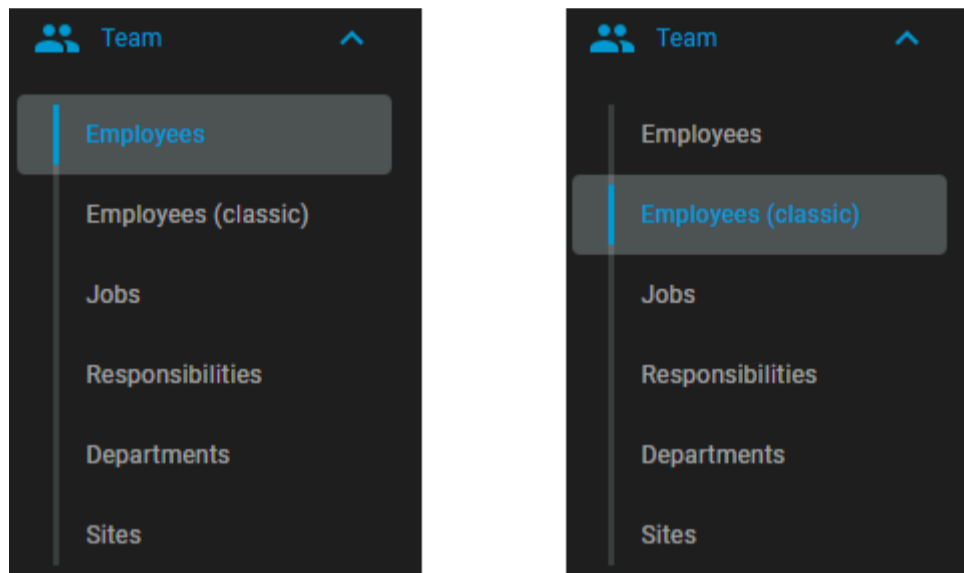
Dec 28, 2022 10:12

Once you hire on new Employees, you can get them up and running with R365 easily. Follow these 4 steps to get your Employees entered in the system and scheduled for training!

Step 1: Enter Employee in POS

Input the Employee into the POS system and clock the Employee in for a zero-minute punch. When the DSS is polled at night, it will populate a new Employee record in R365.

Step 2: Update Employee in R365



First, navigate to **Smart Ops** (<https://help.restaurant365.net/en/support/solutions/articles/12000077625>). Open the Employees grid by clicking 'Employees' or 'Employees (Classic)' under 'Team.' Then, locate the new Employee record in the listing and double-click to open it.

Employees

Employees (Classic)

[Chat with us!](#)

In their **Employee record** (<https://help.restaurant365.net/en/support/solutions/articles/12000041819>), complete the following:

1. **Select the Preferred Contact Method.** If 'Text' is selected, ensure to enter in their Mobile Phone Number without any characters (e.g., XXXXXXXXXXXX).
 - **Note:** If you want Employees to receive text alerts for any future Password resets or Scheduling Announcements, among other alerts, click 'Yes' for 'Allow Text Messaging' and enter in their Mobile Phone Number.
2. **Enter their Email address.** This is case-sensitive and will become their username.
3. **Check the 'App Access' box.** This will provide them access to the **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>).
4. **Add any desired Employee information.** It is important to note that each POS polls different fields. Ensure to reach out to your Coach/CSM or **R365 Support** (<https://help.restaurant365.net/en/support/tickets/new>) to learn which fields are maintained in your POS versus R365.

Save and close the record. Upon saving, an alert will go out to the Employee's preferred contact method with temporary login credentials. After the initial email or text message is sent, a 'Send Temporary Password' button near the 'App Access' checkbox will appear to use if the temporary credentials expire.

Step 3: Inform the Employee about the R365 Red App

Have the Employee download the **R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>) so that they can view their Schedule and make shift requests as needed. Once the app is downloaded, the Employee can review the following R365 Red App training articles to learn more about the app:

- **R365 Scheduling for Employees Overview** (<https://help.restaurant365.net/en/support/solutions/articles/12000056461>)
- **Download the R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000055812>)
- **Log in to the R365 Red App** (<https://help.restaurant365.net/en/support/solutions/articles/12000056462>)
- **View the Schedule and Your Upcoming Shifts** (<https://help.restaurant365.net/en/support/solutions/articles/12000056463>)
- **Make Schedule Requests** (<https://help.restaurant365.net/en/support/solutions/articles/12000056464>)
- **Update Your Availability** (<https://help.restaurant365.net/en/support/solutions/articles/12000056465>)
- **Update Your Password** (<https://help.restaurant365.net/en/support/solutions/articles/12000073958>)
- (<https://help.restaurant365.net/en/support/solutions/articles/12000080310>) **Enable Automatic Updates** (<https://help.restaurant365.net/en/support/solutions/articles/12000080310>)

Step 4: Begin Scheduling!

The Employee can now be scheduled for their training! Click here to learn how to **schedule Shifts** (<https://help.restaurant365.net/en/support/solutions/articles/12000055802>).