



Shifttee

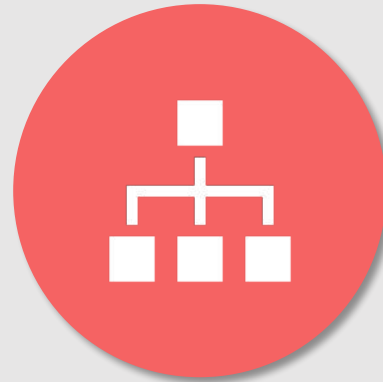
User Manual for Owner Access Level

Employee Scheduler & Timeclock Attendance



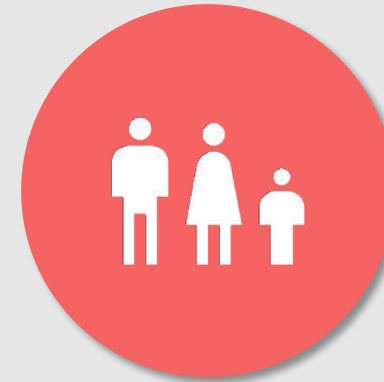
Service Proposal

See what Shiftee has to offer.



Multiple Locations

Manage employees working in multiple branches.



Access Level Privileges

Learn more about Shiftee's 4 access levels: Owner, Manager, Supervisor, and Employee.

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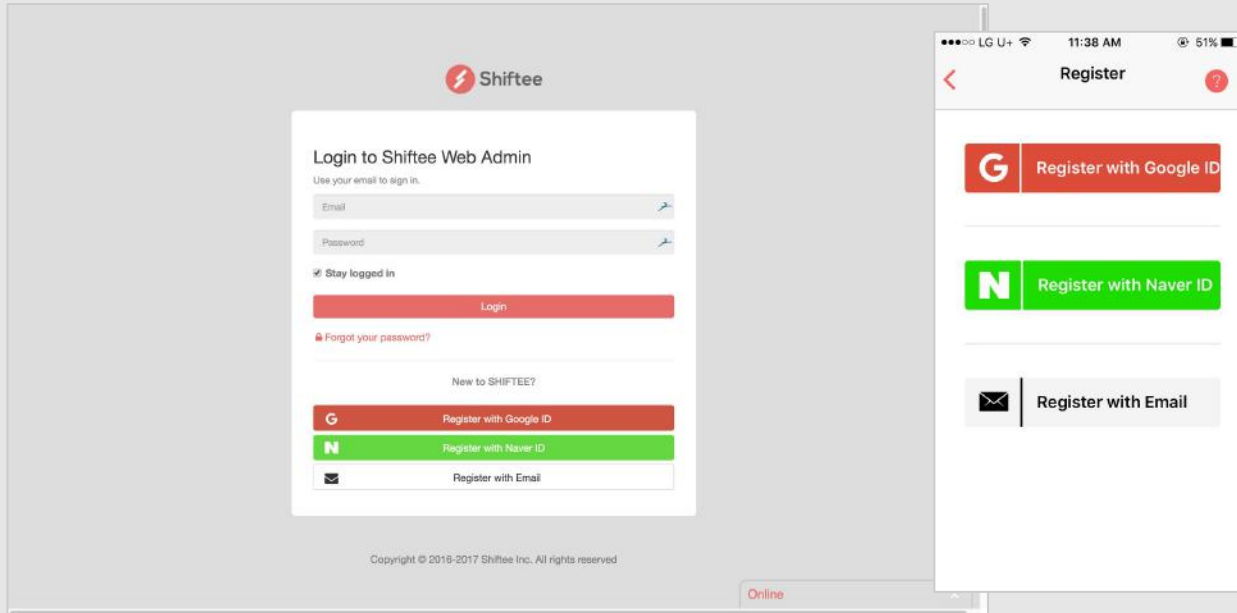
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Company Settings **13p**

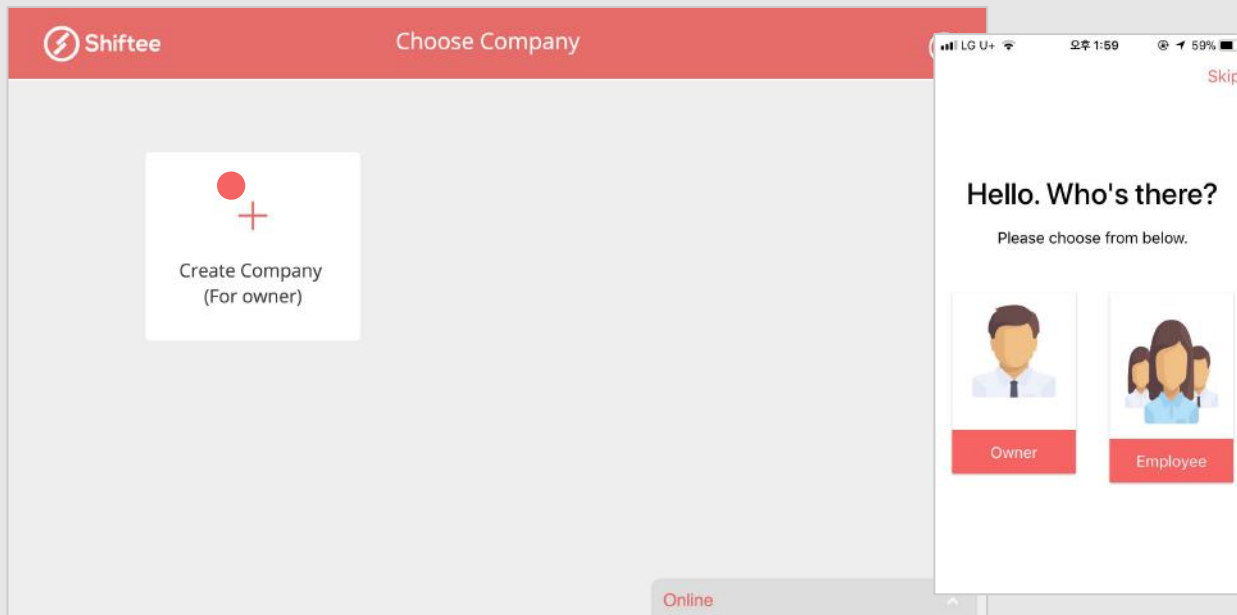
'Company' encompasses all 'Locations' and 'Employees' that an Owner create. After creating a company, you can add locations and invite employees. Create multiple stores or offices as Locations rather than creating separate companies



01 Registration

- Go to <https://shiftee.io> or open Shiftee mobile app
- Click [Web Admin] on website or click [Register]
- Register with Google ID or your other personal Email

*Registering with your email other than gmail requires you to verify your email. Check your inbox for a mail from Shiftee and click [Confirm].

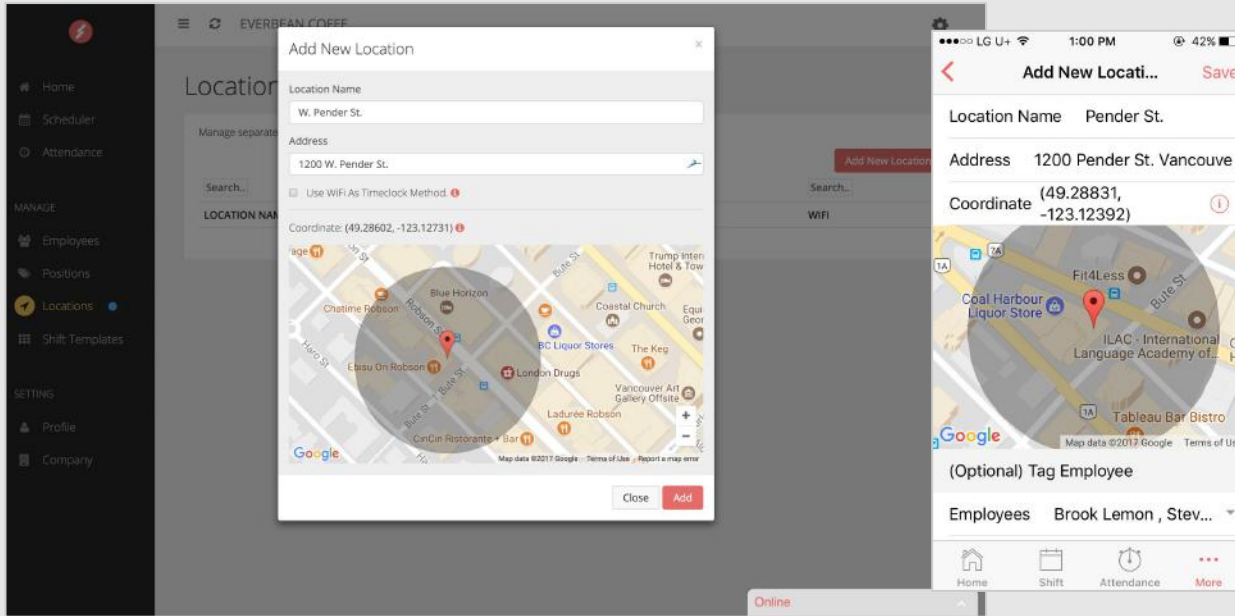


02 Create Company

- Click [Create Company(Owner)] Or [Owner]
- Enter company name
- Click [Create]

INITIAL SETUP : Create Locations (GPS/WiFi)

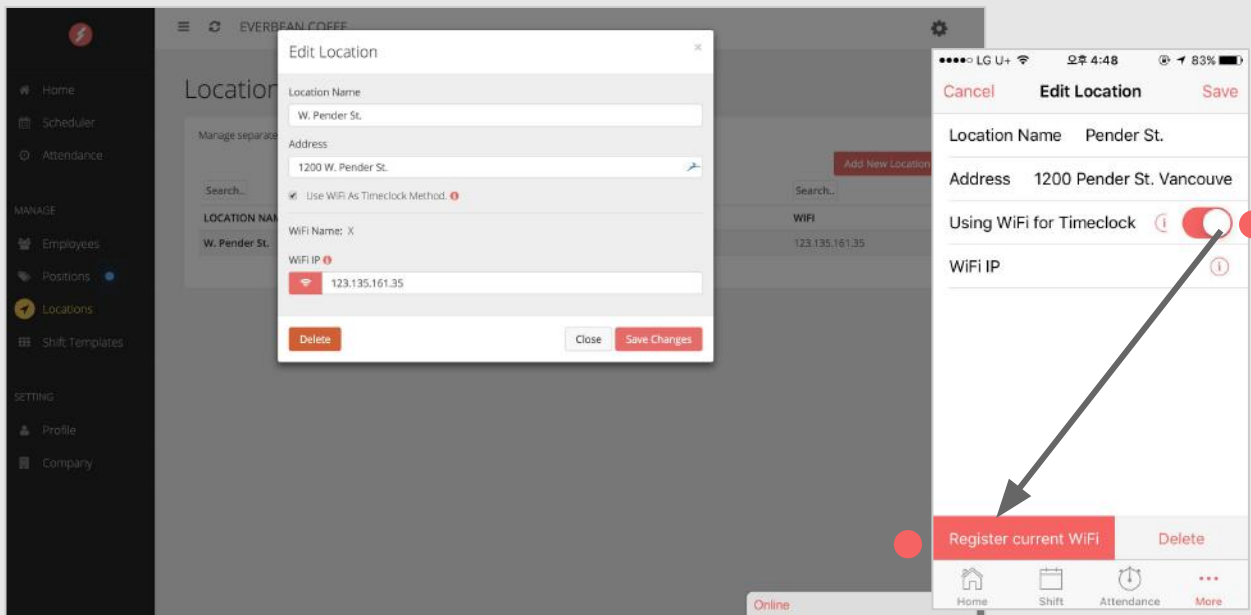
'Location' contains 'Employees' and unlimited number of locations can be created within a 'Company'. Employees can only clock-in/out when they are at the location.



03 Create Location Using GPS

- A. **PC** [Location] - [Add Location] | **Mobile** [More] - [Location] - [+]
- B. Enter Location name and address. Select suggested address below.
- C. Check the GPS coordinates and the pin on the map. [Save]

*If coordinates are not accurate, move around the pin on the map.

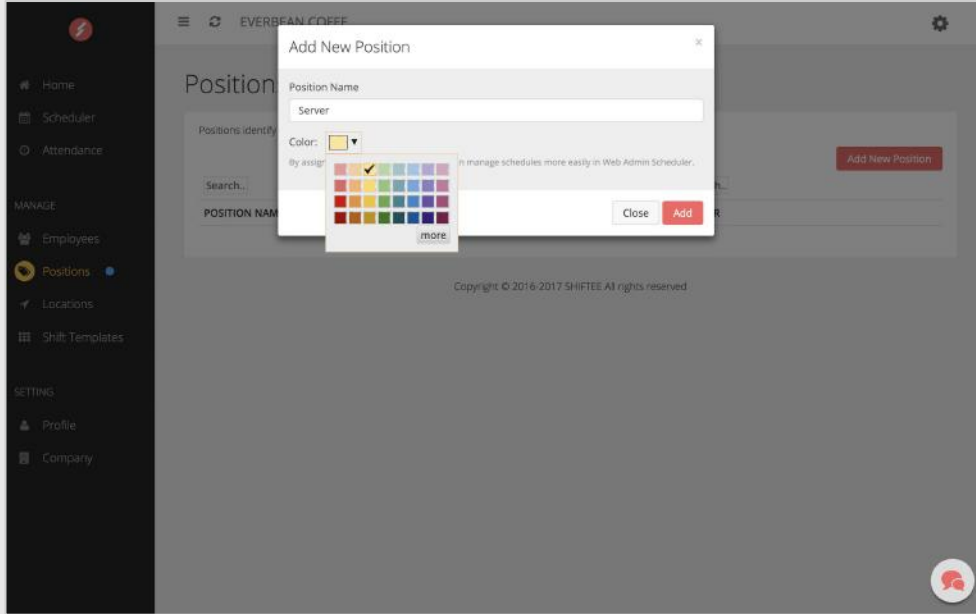


04 Edit Location to Setup WiFi

- A. **PC** [Location] - Select a location
- A. **Mobile** [More] - [Location] -
- B. Check [Use WiFi for Timeclock]
- B. Select a Location - [Edit]
- C. Click red WiFi button
- C. Turn on [Use WiFi for Timeclock]
- D. Check IP address - [Save]
- C. Tap [Register Current WiFi]
- D. Check IP address - [Save]

*We recommend using your smartphone to register WiFi as it will also get SSID (WiFi name) to reduce confusion.

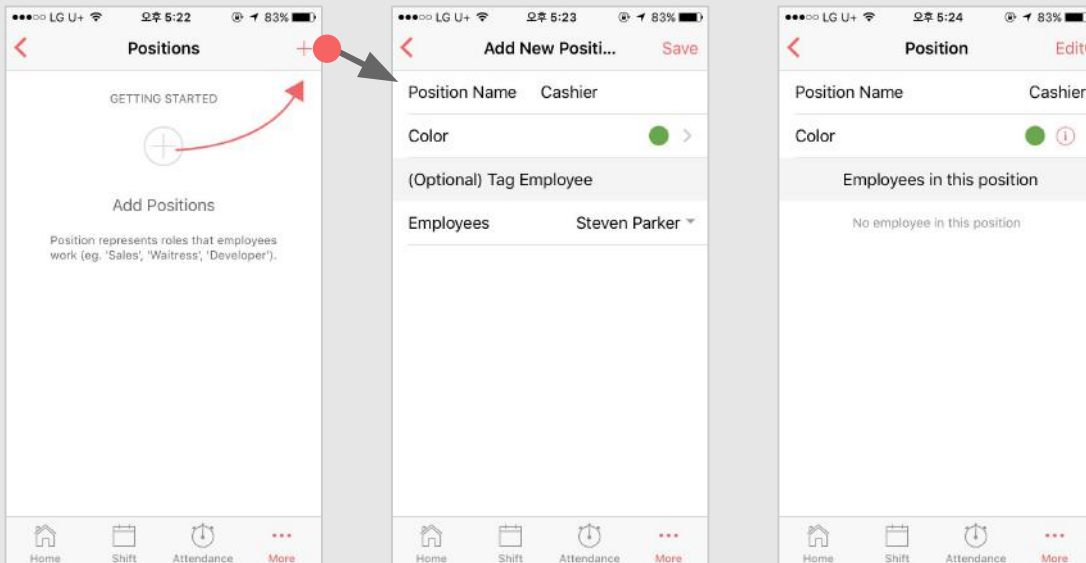
Multiple 'Positions' can be assigned to an 'Employee'.
Every shift and attendance will contain a position to distinguish the work.



05 Create Positions

- A. **PC** [Positoin] - [Create Position]
- B. Enter name and select color.
- C. [Add]

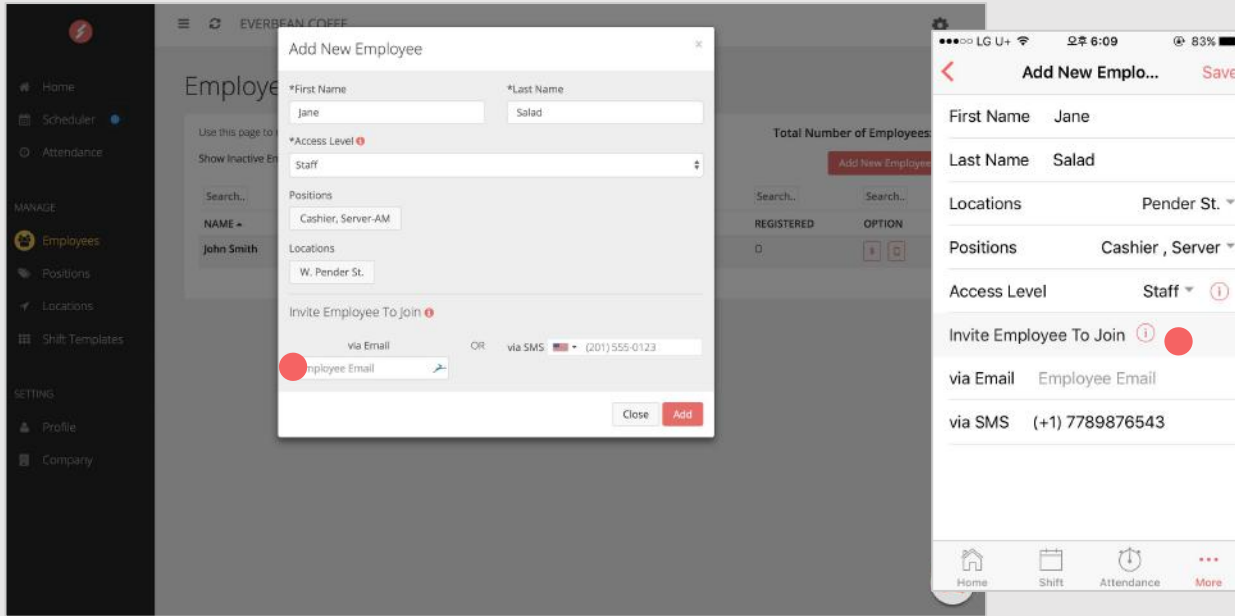
*To delete a position, simply open the position and [Delete]



- A. **Mobile** [More] - [Positions] - [+]
- B. Enter name and select color.
- C. [Save]

*You can view who has the position or even assign employees here.

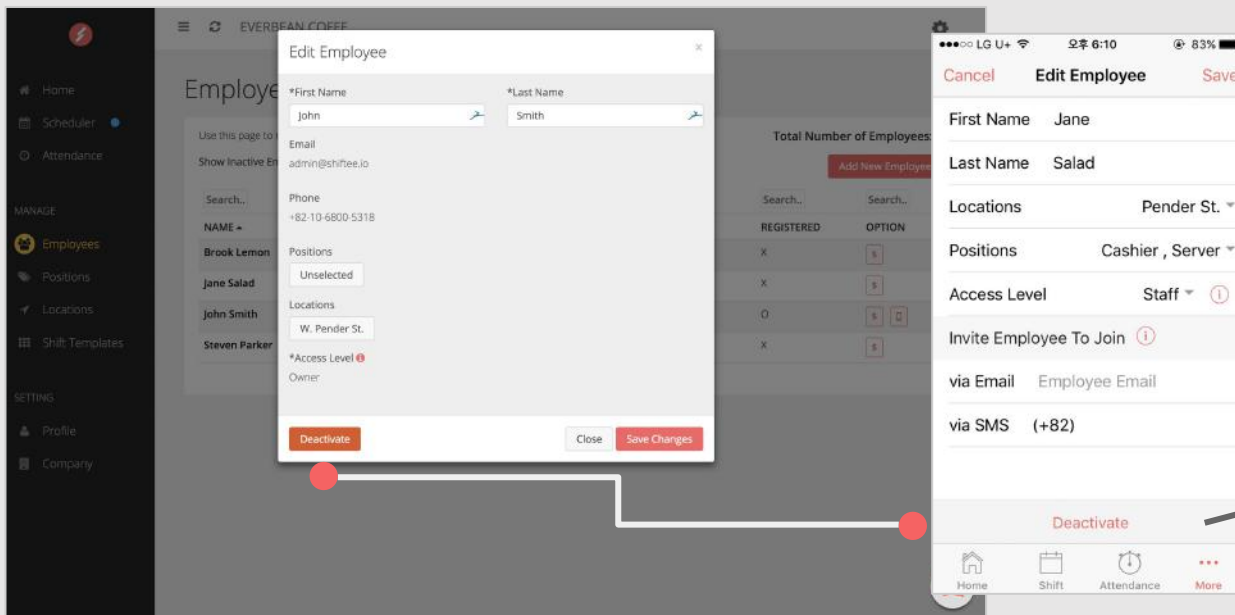
An employee can be assigned more than one location. He/she can only have shifts scheduled in the assigned locations and also clock-in/out there. All managing access levels can manage other employees.



01 Create an Employee Profile

- A. **PC** [Employees] - [Add] | **Mobile** [More] - [Employees] - [+]
- B. Enter Name, Access Level, Position(s), and Location(s)
- C. To send an INVITE code, enter either an email or a phone number.
- D. [Save]

*Employees can 'Join Company' by:
Download - [Registration] - [Join Company] - Enter INVITE code.
*Please distribute the [Employee User Manual](#) to Staff Level Employees.

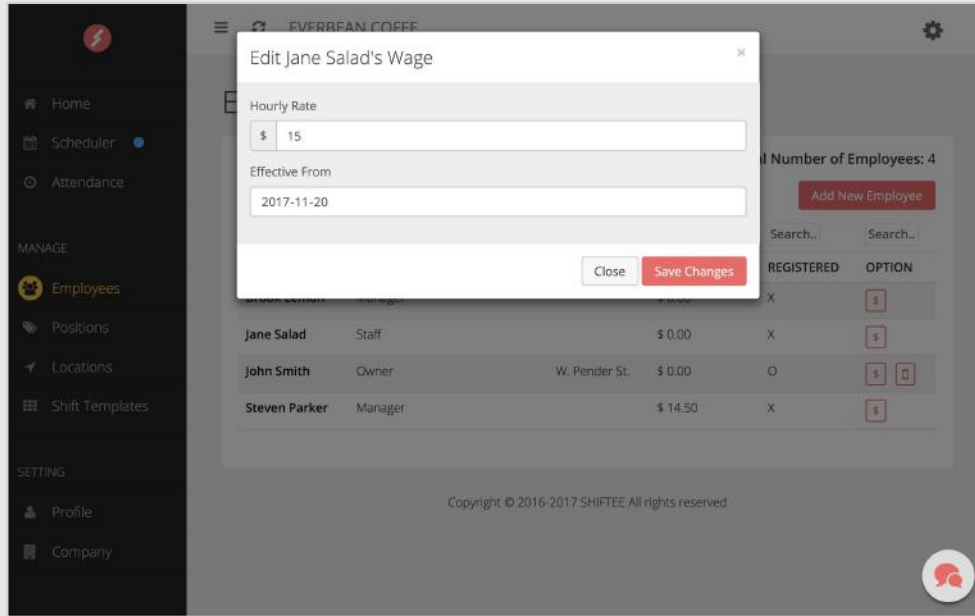


02 Edit Employee Profile

- A. **PC** [Employees] | **Mobile** [More] - [Employees]
- B. Select a employee and [Edit]
- C. Make changes
- D. [Save]

*Deactivate an employee upon permanent leave or layoff.

Wages: Shiftee bases on wages to automatically process payroll.
 Device Binding: An employee's smartphone device will be bound to the employee profile to prevent buddy-clocking.

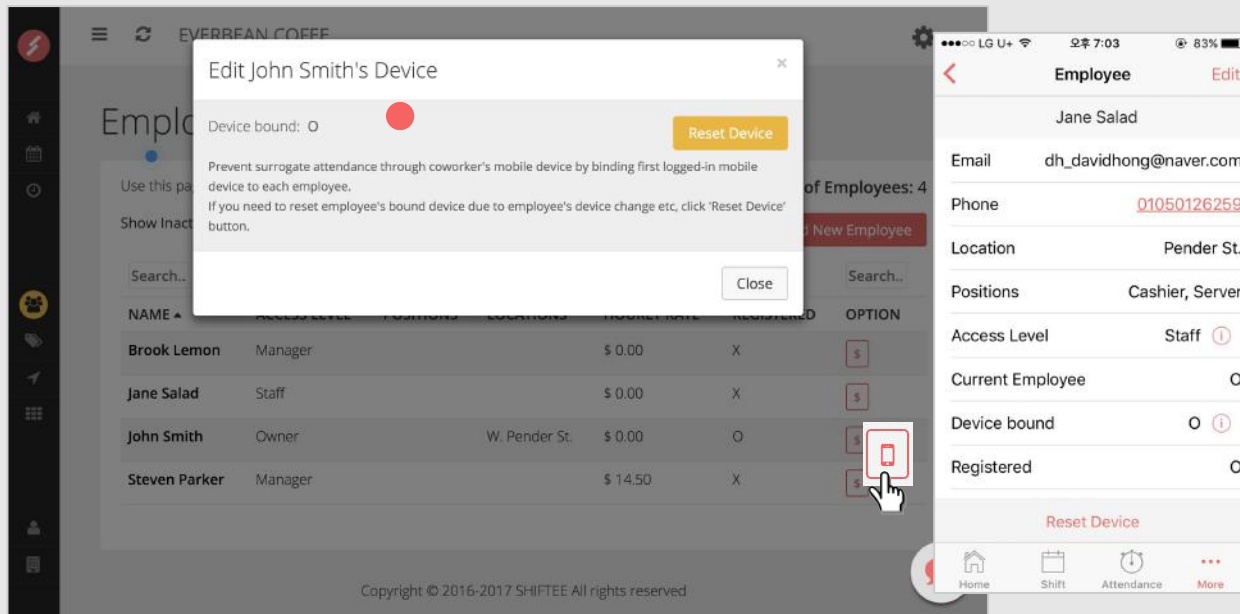


03 Set Wages

- PC [Employees] - Click [\$ icon] on the right of each employee
- Enter Wage and Effective Date



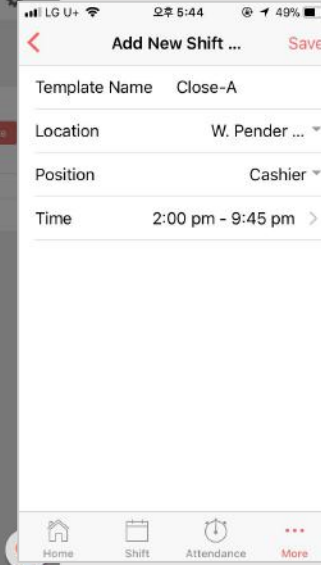
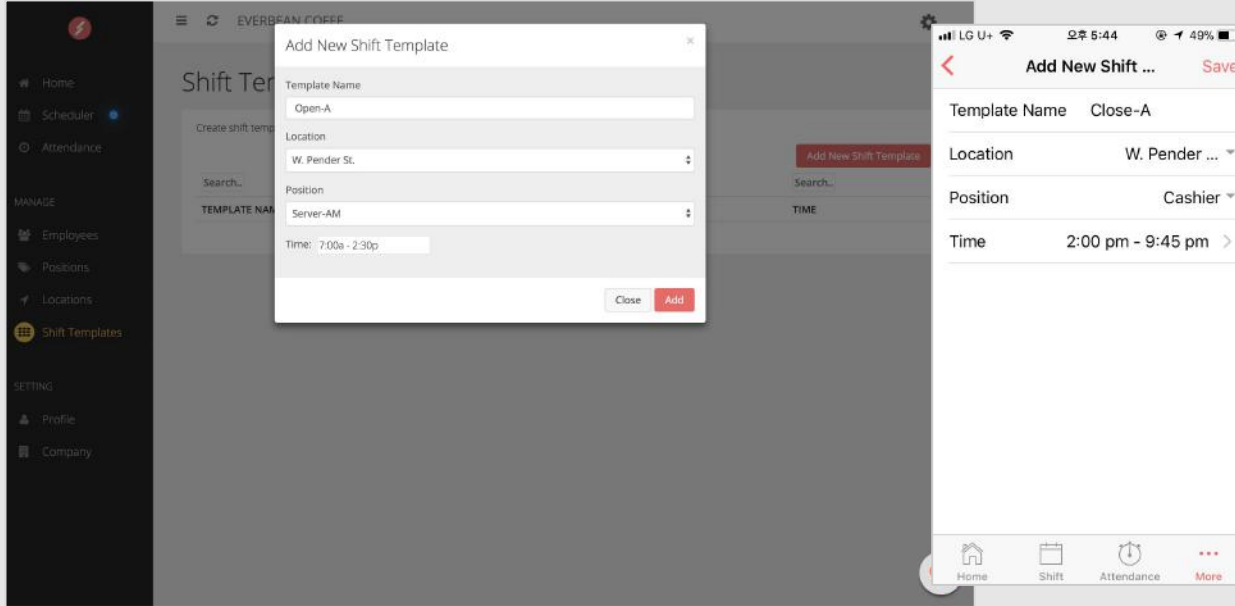
*Shiftee's automatic payroll bases on each employee's wages and effective dates.
 *Learn more about Payroll at [Help Article](#) or [FAQ](#) page



04 Reset Employee's Bound Device

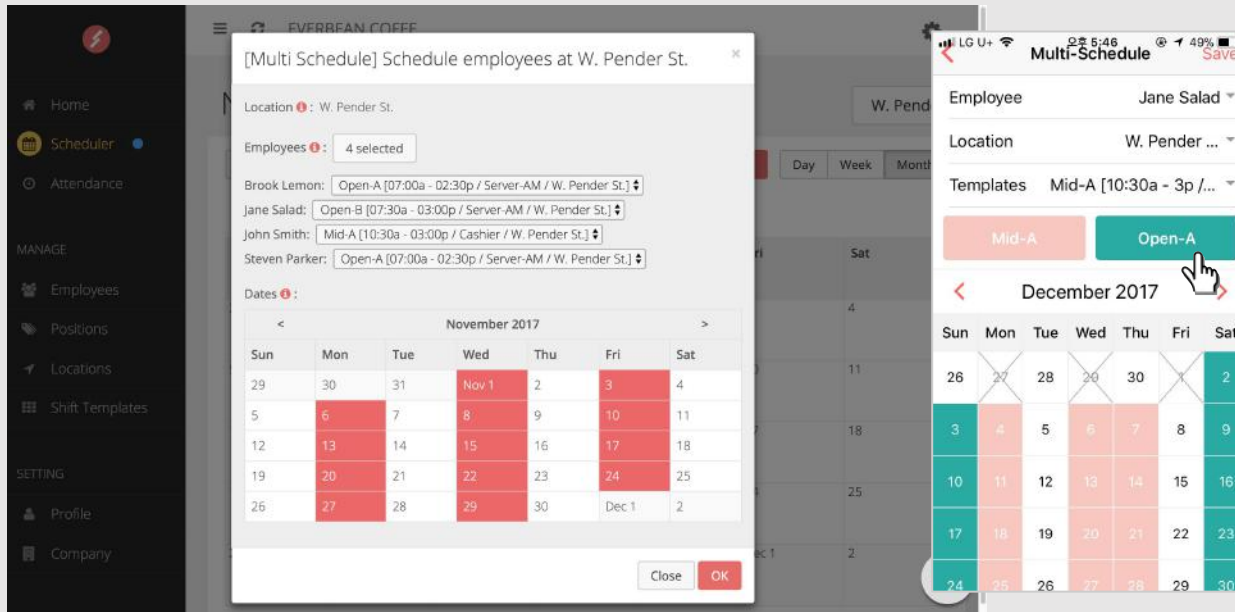
- PC [Employees] - Click [Device Icon] | Mobile [More] - [Employees]
- Click [Reset Device] - Select an employee
- 'Device Bound' will turn from O to X.
- Then have your staff to use the new device to login. We will re-bind the new device automatically.

Shiftee uses the planned shifts to tell if an employee is late, overtime, early clock-out, etc. and send appropriate notifications.



01 Create Shift Templates

- A. **PC** [Shift Templates] - [Add] | **Mobile** [More] - [Shift Templates] - [+]
- B. Enter Name, Location, Position, and Shift Time for a template.
- C. [Save]



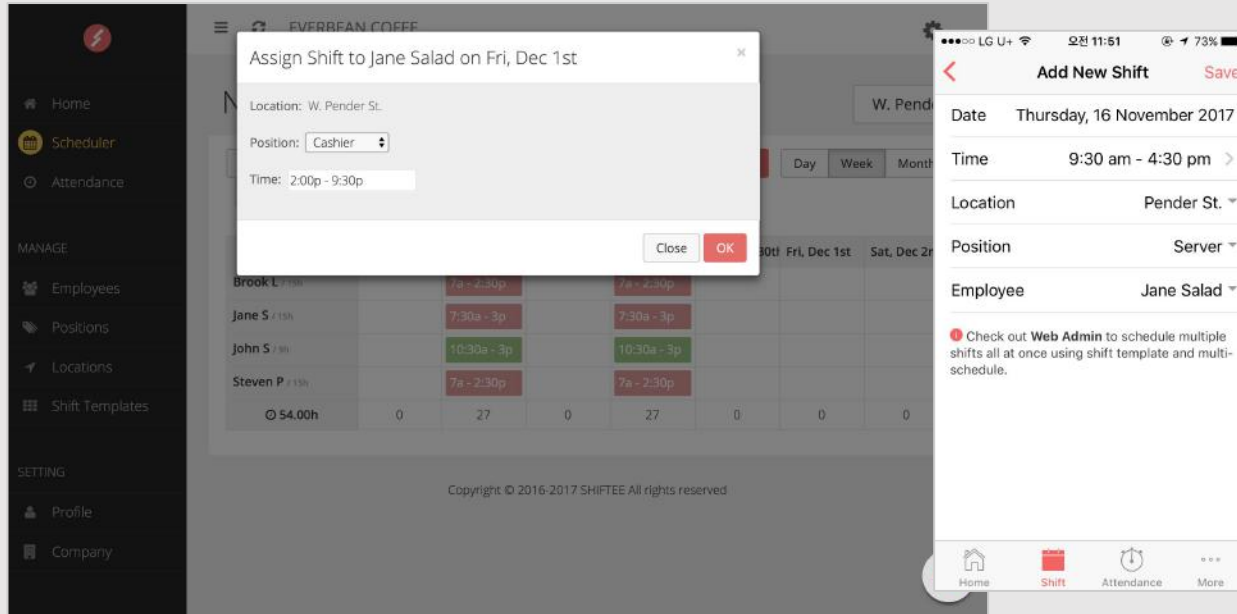
02 Multi-Schedule

- A. **PC** [Schedule] - Select Location - [Multi-Schedule]
 - B. Select employee(s) and template(s)
 - C. Select dates that the shifts to occur.
- A. **Mobile** [Shift] - [+] - [Multi-Schedule]
 - B. Select employee, location, and template(s)
 - C. Select dates for each template - [Save]

*How to select dates:

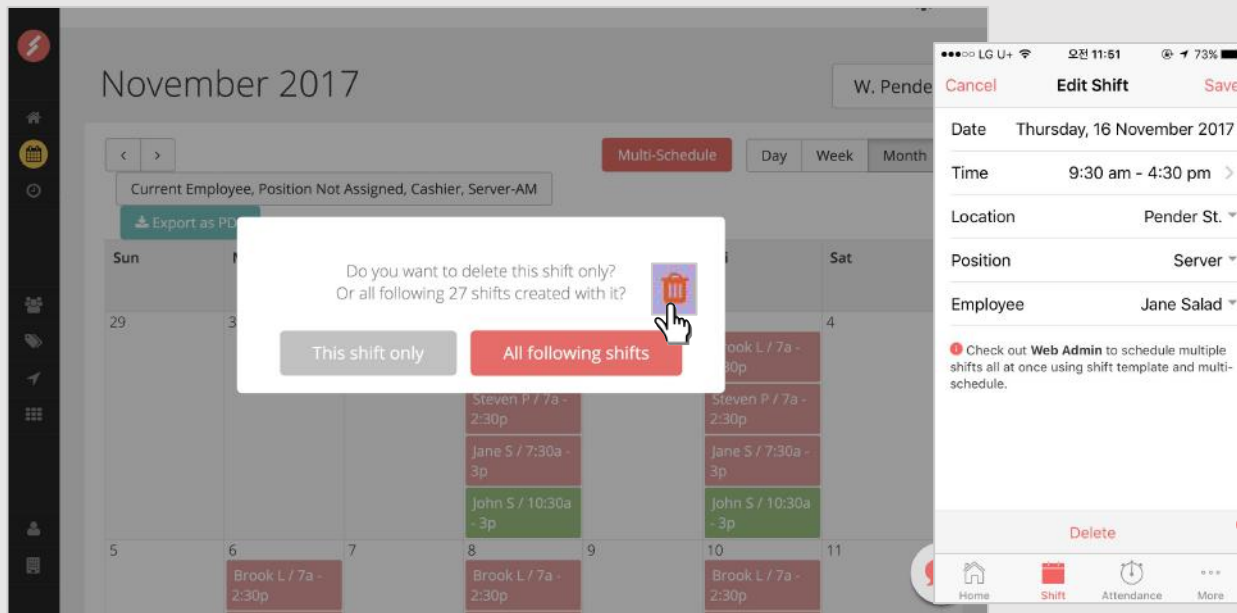
1. Tap Month (Selects all dates)
2. Tap Day (Selects whole column of day)
3. Tap Date (Only selects a single date)

Shiftee uses the planned shifts to tell if an employee is late, overtime, early clock-out, etc. and send appropriate notifications.



03 Single Scheduling

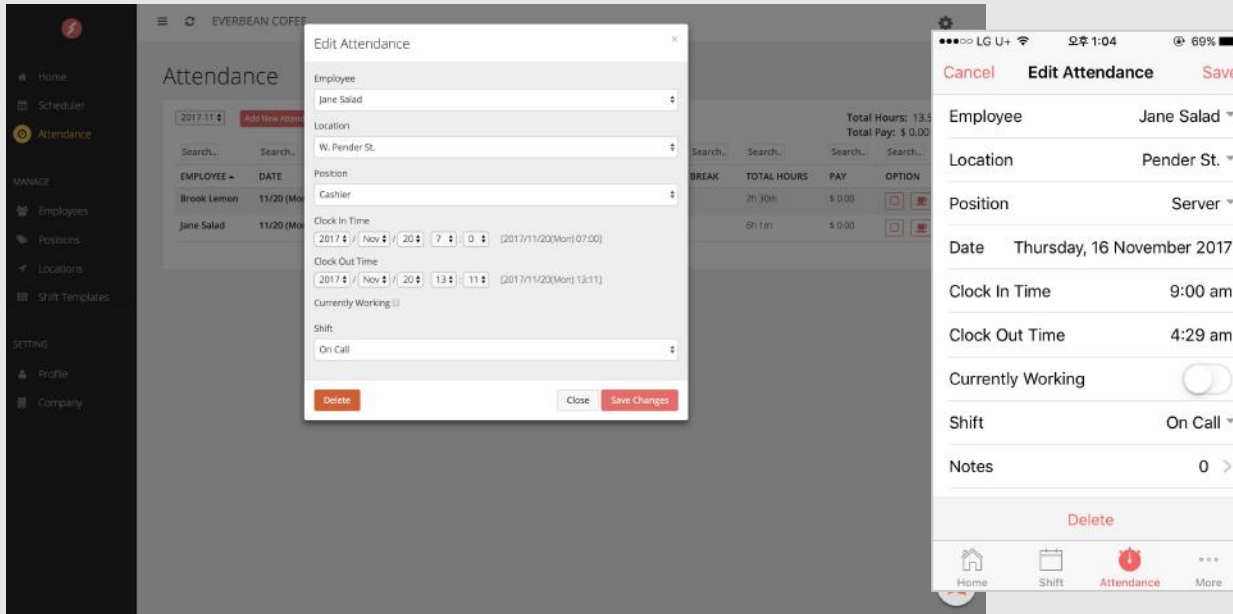
- A. **PC [Schedule]** - Select a date | **Mobile [Shift] - [+]** - [Single Shift]
- B. Select Employee, Location, Position, and enter time.
- C. [Save]



04 Deleting Shift(s)

- A. **PC [Schedule]**
 - B. Hover your mouse on a shift to
 - C. Click on a red trash icon that appears
 - D. Select 'This shift only' or 'All following' (If you'd like to cancel deleting at this point, refresh.)
- A. **Mobile [Shift]** - Open a shift
 - B. [Edit]
 - C. [Delete]
 - D. Select 'This shift only' or 'All following'

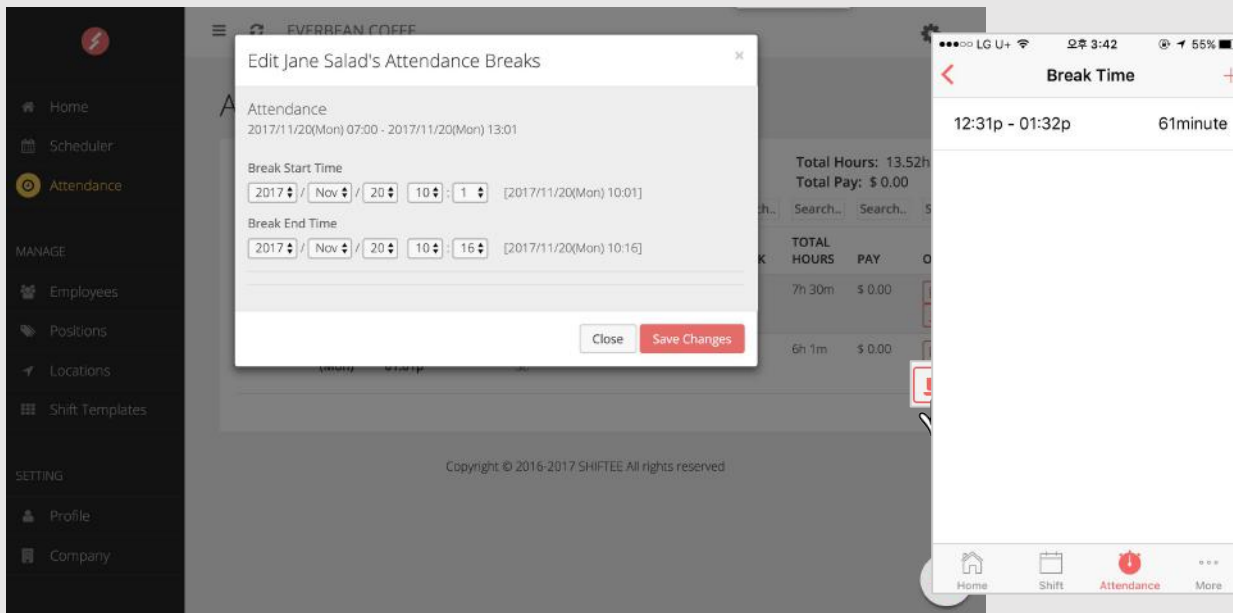
Break can be recorded by employees which will be deducted from the Total hours.



01 Add/Edit Attendance

- | | |
|-----------------------------------|--------------------------------------|
| A. PC [Attendance] | A. Mobile [Attendance] |
| B. Edit) Open an attendance | B. Edit) Open an attendance - [Edit] |
| C. Add) Click [Add an Attendance] | C. Add) Tap [+] |
| D. Fill in or make changes | D. Fill in or make changes |
| E. [Save] | E. [Save] |

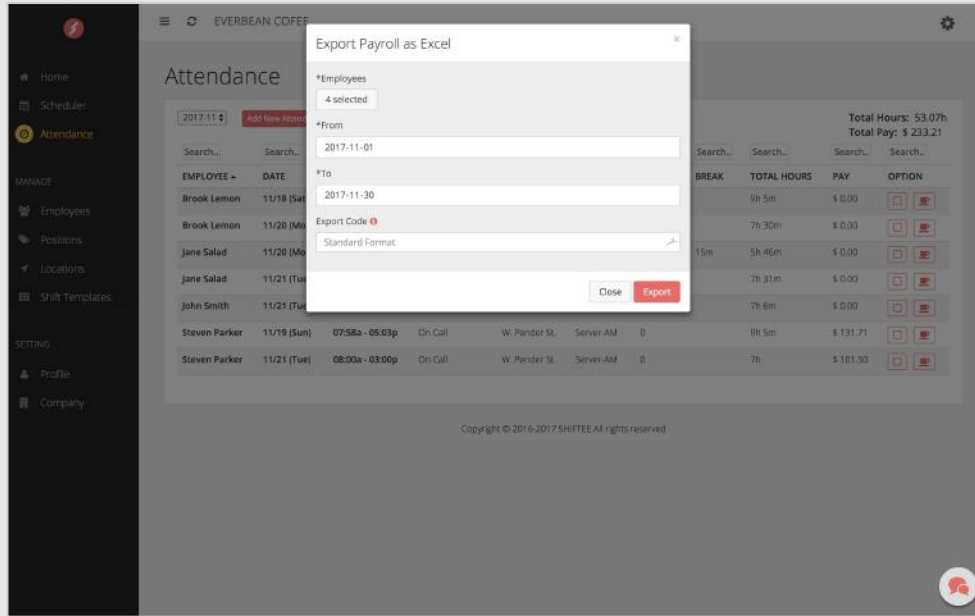
*In Shifte Mobile App Home screen, 'Attendances not Clocked-out' is easily accessible




02 Edit/Add Break

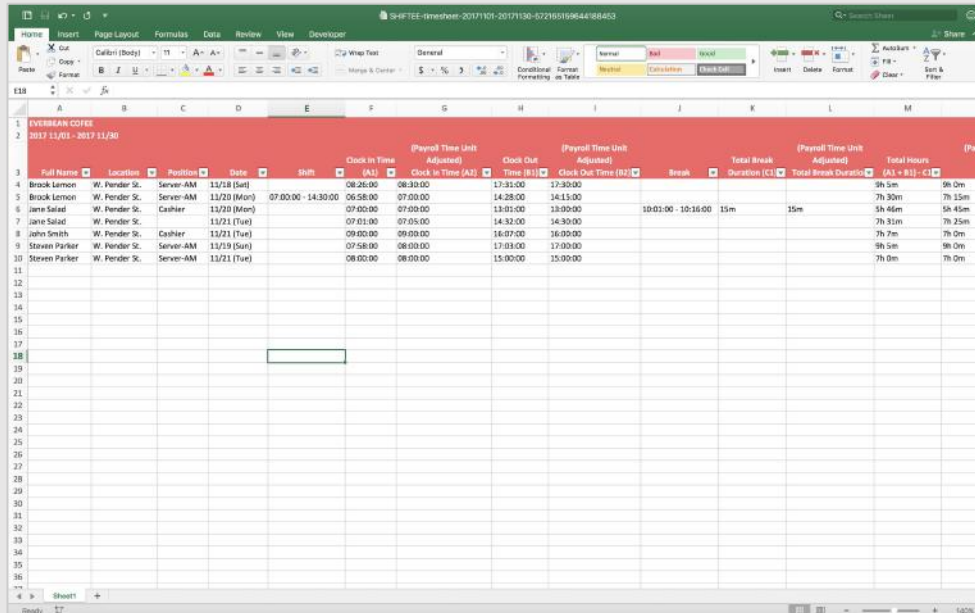
- | | |
|--|---------------------------|
| A. PC [Attendance] | A. Mobile [Attendance] |
| B. Click on a coffee icon on the right | B. Select an attendance |
| C. Add or Edit break time | C. Select [Break] row. |
| D. [Save] | D. Open a break to edit |
| | E. Tap [+] to add. |
| | F. Add or Edit break time |
| | G. [Save] |

Payroll is based on the wage of each employee and his/her attendances.



03 Payroll Export to Excel

- A. PC [Attendance] - Click 
- B. Select employee(s), Start-date, and End-date
- C. [Export]



04 Check Exported Excel

- A. Shiftee bases payroll on Payroll Time Unit applied hours.

*Check out Help Articles on payroll to learn more.



- Home
- Scheduler
- Attendance
- MANAGE
 - Employees
 - Positions
 - Locations
 - Shift Templates
- SETTING
 - Profile
 - Company

Scheduler

Feature Use shift approval feature.
(Owner/manager can approve/unapprove shifts (supervisors cannot). Approved shifts cannot be edited/deleted.)

Timeclock

Feature Use break button.
(Record precise break time by using Start/End Break buttons. If undesired, managers can always add/edit break manually.)

Feature Use attendance approval feature.
(Owner/manager can approve/unapprove attendances (supervisors cannot). Approved attendances cannot be edited/deleted.)

Supervisor Permission Supervisors can add/edit/delete attendance records for staffs in assigned location.

Supervisor Permission Supervisors can view their own attendance records.

Staff Permission Staffs can view their own attendance records. *You can limit permissions for Supervisor access level. Change these settings to fit your business needs.

Payroll

Currency: \$ - Canada Dollar

Payroll Time Unit

Clock In Time: Round up to nearest 5 minutes (e.g 08:37 => 08:40)

Clock Out Time: Round down to nearest 15 minutes (e.g 18:08 => 18:00)

Total Break Time: Round up to nearest 5 minutes (e.g 43m => 45m)

01 Approve Shifts to Finalize

02 Use Break Feature

03 Approve Attendance to Finalize

04 Limit Permissions

05 Rounding Up/Down Rules for Payroll



Shiftee

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