

It is important to assign credentials to those employees who will be using Synergy as a "user". This means anyone that will be doing manager functions such as Cash Management, Scheduling, Employee Management, Purchasing etc. There are two roles currently which are Assistant (any manager) and General manager (only used for the GM as ALL payroll can be seen).

 Login credentials can be created in the Employees menu found in the HRM tab.

Cash ~ Financial ~	HRM - Inventory -	Location Daily Summary	Operations ~	Purchasing ~	Quick Reports				
E Shortc	Budget Setup	Clocking Management	Payroll Managemen	t Schedul	e Management	Staff Management			
	Sales and Labor	Clocking Exceptions	Payroll Export	Absence I	Management	Employees			
		Clocking Reports	Payroll Reports	Budget Ta	argets				
				Employee	Requests				
				End of Nig	ght				
				Forecastir	ng Calculator				
Location Daily S				Schedule	Editor	ι			

 Find the employee and choose the 3 dots to Edit the Employee. Then on the security tab please add the "role". Do not assign a security level, that needs to remain BLANK.

Edit Employee	Ø	Ω	Security Level:
Loan Employee Transfer Employee	© ↓	Personal Payroll Pay Rates Absences	Role Select Role Assistant Manager General Manager
Send Login Details	\square	" History	DEFAULT DEFAULT
Send Reset Password	-	Security	
Terminate	-		Canc I Save

Note: Make sure you hit the blue add and save otherwise it will not take the change.

 Click the 3 dots to the far right of an employee and select "Send Login Details" (Note: If this option is grayed out, they have already received login details. You can choose "Send Reset Password" instead)



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Staff Number	First Name	Last Name	Email	Start Date	End Date	Section		Status		
100004915				Jan 14, 2022		Grill Cook			:	
100002305				Mar 19, 2010		Server			7	•
100003785				Jul 6, 2021		Fountain	Edit Emplo	yee		Ø
100009201				Mar 26, 2023		Greeter	Loan Empl	ovee		জা
100004629				Nov 15, 2021		Greeter	Transfer Employee			\rightarrow
								npioyee		<u> </u>
							Send Logir	n Details	I	\square
							Terminate			Ē

Additional Notes:

- All Managers are currently set to "assistant manager" under the role page.
- Employees will receive login information at the email address listed in the system. This email needs to be unique!
- If an employee does not receive the email, they can click the "Forgot Password" button in the Cover app.
- The same login credentials can be used for
 - Cover app (all employees)
 - Synergy app (managers)
 - Synergy web site (managers)

Note: If an employee attempts to log in to the manager app or web site, they will not have access to any functions as they were not assigned a role in Step 2. This is what gives them access. Employees are automatically assigned to "default" which has zero functionality currently in the system.



Leave the Security Level field <u>blank</u> – this is <u>different</u> from an employee job code.