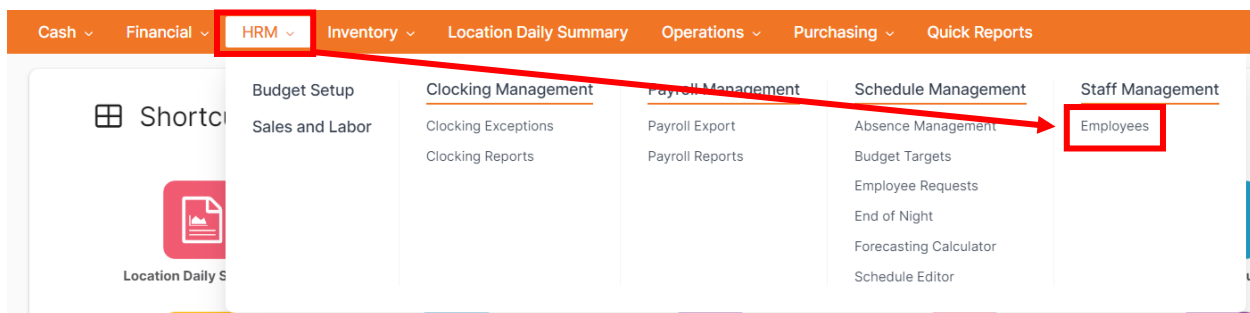
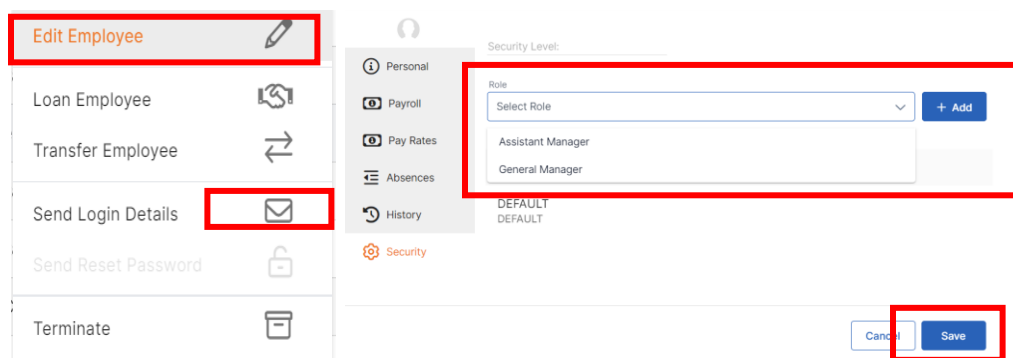


It is important to assign credentials to those employees who will be using Synergy as a “user”. This means anyone that will be doing manager functions such as Cash Management, Scheduling, Employee Management, Purchasing etc. There are two roles currently which are Assistant (any manager) and General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

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



2. 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.



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

3. 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)

<input type="checkbox"/>	Staff Number	First Name	Last Name	Email	Start Date	End Date	Section	Status	Actions
<input type="checkbox"/>	100004915				Jan 14, 2022		Grill Cook		⋮
<input type="checkbox"/>	100002305				Mar 19, 2010		Server		⋮
<input type="checkbox"/>	100003785				Jul 6, 2021		Fountain		⋮
<input type="checkbox"/>	100009201				Mar 26, 2023		Greeter		⋮
<input type="checkbox"/>	100004629				Nov 15, 2021		Greeter		⋮

- Edit Employee
- Loan Employee
- Transfer Employee
- Send Login Details
- Send Reset Password
- Terminate

## 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 blank – this is different from an employee job code.**