

Getting Started With Homebase for Your Small Business

Putting the right systems and processes in place is key to getting your small business off the ground and running successfully.

Whether you're using Homebase to launch your new business or making some changes to an existing one, we're here to help every step of the way.

And to prove it, we've put together a step-by-step guide to help you get your small business set up and running smoothly with Homebase today.

Need an account?

If you haven't signed up for Homebase yet, before you jump into Step 1, you'll want to do that [here](#).

Just follow the prompts, answer a few simple questions, and you'll be on your way.

STEP 1:

Set up your new Homebase account

There's something wonderful about a fresh start—and your brand new Homebase account is just that. When you first log into your Homebase account, you'll have a clear view of your dashboard, where you'll see all the key information to run your business and manage your team.

Here are a few settings in your Homebase account that you won't want to miss:

Breaks and compliance

Breaks are more than just a kind gesture. Staying on top of breaks and employee hours is key to keeping compliant with federal and state employment laws.

By setting customized rules for your team, you can stay compliant and make break tracking a breeze.

Setting up your break rules:

- Select 'Settings' in the menu on your left.
- Select 'Breaks & Compliance' under Scheduling.
- Click on 'Add New Break Rule'.
- Enter your break rule details, including: break lengths, if they're paid or unpaid, when employees are entitled to this type of break, as well as if the break is mandatory or optional.
- Repeat steps 4 and 5 for any additional break rules you'd like to include.
- Turn breaks on and off by checking the box to the left of every rule. Breaks that are on will have a green check mark.
- Click 'Save Changes' on the top right corner of your account.

Work week schedules

Not all work weeks start on Monday, and not all shifts run 9 to 5. Choose a schedule that fits your business needs best depending on your industry.

By setting your work week schedule, you'll set yourself up for a streamlined scheduling process.

Setting up your payroll period:

- Select 'Settings' in your menu on the left.
- Select 'Schedule Enforcement' under Scheduling.
- Click on the drop-down menu next to 'Start of Work Week' and choose the day of the week you want to start your schedule.
- Select the hours you want on your schedule next to 'Scheduling Hours'.
- Explore any other features you may want to implement, including clock-out reminders or preventing early clock-ins.
- Click 'Save Changes' on the top right corner of your account.

Payroll period

This is the regular cycle that determines when employees get paid for their hours worked. Common pay periods include daily, bi-weekly, semi-monthly, or even monthly.

By setting up the right payroll period, you can make sure that your Homebase timesheets match your payroll.

Setting up your payroll period:

- Select 'Settings' in your menu on the left.
- Select 'Payroll'.
- Under 'Pay Schedule' choose your payroll period and the date you want to start your first payroll period.
- Click 'Save Changes' on the top right corner of your account.

Things change—and that's ok

As your business grows, your needs and requirements change. Thankfully, Homebase works with you. Come back any time to adjust your account settings; they'll be waiting just where you last left them.

STEP 2:

Add your team to Homebase

Now that you have your account set up, it's time to loop in your team. Once you add your team, you'll be able to schedule their shifts, track their work hours, and communicate with them within the Homebase app.

[Here's how to add new team members to Homebase:](#)



- Select 'Team' in the menu on your left and select 'Roster'.
- Click 'Add Team Member' at the top right-hand corner.
- Select 'Add Employees Individually'.
- Enter each employee's information, including: name, contact information, role, and wage. In certain plans, you can also choose an employee's access level.
- If an employee has multiple roles or job titles, you can select 'Add Another Role'.
- If you have to add more employees, select 'Save and Add Another'.
- Once you've added all your employees into Homebase, select 'Save and Finish'.

STEP 3:

Start scheduling shifts

With Homebase, putting together an employee schedule is simple, meaning you can start scheduling with Homebase without skipping a beat. In just a few minutes, you'll have a work schedule that's ready to share with your team.

[Here's how to add shifts to your schedule:](#)

- Select 'Schedule' in the menu on your left.
- Hover over the day of the week and the employee you want to add to the schedule and click 'ADD +'.
- Choose if you want to add a Custom Shift, Common Shift, or Time Off.
- For a Custom Shift, enter the employee's shift details, including: start and end time, the employee's role, days of the week, and any shift notes. You can also color code roles to make the schedule easier to review.
- Click the 'Add' button to add the shift to the schedule.
- To edit scheduled shifts, simply hover over the shift in the schedule. You can then move, edit, add, copy, or delete that shift.

Save time with scheduling

Common Shifts are past shifts that employee is often scheduled for. As you start to create schedules, you'll be able to speed up scheduling by simply adding Common Shifts, instead of creating Custom Shifts every time.

STEP 4:

Choose the right time clock

Before your first scheduled shift, you'll want to choose a time clock. By setting up your time clock, you'll be able to manage time cards and track time accurately from day one. Homebase has 3 types of time clocks to choose from.

Mobile Time Clock

Let employees clock into their shifts right from their phones. By using the Mobile Time Clock, you can also access features such as GPS Snapshots and Geo-fencing to reduce time theft and stay on top of your labor costs.

Web Time Clock

Turn any device or browser into a time clock. All you need to do is log into your Homebase account and launch a Shared Time Clock for your team.

Tablet Time Clock

Similar to an old-school punch clock, you can mount a shared iPad or Android tablet within your business so employees can easily clock in and out. With a Tablet Time Clock, you can set individual pins and even take a snapshot of your employees as they clock in and out. You just need to download the Time Clock by Homebase app to your tablet.

[Here's how to update your time clock settings:](#)



- Select 'Schedule' in the menu on your left.
- Select 'Time Clock Options' under 'Time Tracking'.
- Follow the steps to enable the time clocks and settings that you want to use for your team.

STEP 5:

Get to know your Timesheet Dashboard

Whether you're reviewing your labor costs or getting ready to run payroll, your Timesheet Dashboard is where you can review all employee working hours. Unlike manual spreadsheets or time cards, Homebase's Timesheet Dashboard keeps everything organized and allows you to filter the information, so you can see what you need when you need it.

Your Timesheet Dashboard might be a little empty as you're getting set up, but as employees start to clock in and complete their shifts, you'll see their time cards populate into your dashboard.

In the meantime, here are some things to keep an eye out for on your Timesheet Dashboard:

Date range:

Choose the dates for which you want to view employee hours and time cards. You can select your current payroll period, previous payroll period, today, or choose a custom date range to a maximum of 31 days.

Section columns:

Choose the information you want to see for each time card ranging from total hours worked, employee breaks, or even estimated overtime. You can choose the columns you want to see by using the 'Show/Hide Columns' drop-down in the Filter Timesheets menu.

Timecard data:

Every row underneath your section headers represents an individual time card, which populates at the end of every employee's shift.

Section headers:

The headers change depending on how you filter your time cards. You can group them by employee, role, or date in the Filter Timesheets menu.

Totals for this pay period:

At the very bottom of your timesheet dashboard, you'll be able to view your totals for your entire team for the selected date range.

STEP 6:

Discover other Homebase features

Now that you're set up with all the basics, it's time to explore all the other features that Homebase has to offer your small business.

- Grow your team by creating your first job posting and [start hiring](#) within the 'Team' section of your dashboard.
- Download the Homebase mobile app to [communicate with your team](#) and view schedules on the go.
- Turn your timesheets into payroll in just a few clicks with [Homebase's full-service payroll](#).
- Discover [integrations](#) that bring all your tools—from point of sale to banking—together with Homebase.