

How to Use Homebase: 7 Steps for Success

Being a new small business owner means performing a daily juggling act. (If you know, you know.) There's never enough time, resources are limited, a million tasks are constantly pulling at your attention, and wasted time quickly adds up, making you anxious about your bottom line.

We get it. That's why we designed Homebase specifically to help you overcome your new business's challenges, making it easier for you to succeed along your entrepreneurial journey.

Unlike software built for big companies, Homebase is tailor-made for small businesses and hourly teams. And unlike many other platforms out there, our basic plan is free, and always will be.

From the moment you start implementing Homebase, you'll give your team members modern tools, easier access to their information, and the kind of well-run team experience that makes them happier and more productive.

To see how Homebase makes your small business life easier, let's walk through 7 different ways our platform can help.



STEP 1:

Centralize and streamline employee scheduling

Scheduling can be one of the most chaotic parts of a new business, but it doesn't need to be.

Homebase's [Scheduling](#) app easily lets you build, share, and optimize schedules in real time from your smartphone, tablet, or computer, making it way easier to keep your team—and your budgets—on track.

Start with Homebase's [free employee schedule maker](#) to create your first schedule, then share with your team members and let them coordinate any shift swaps if necessary. With everything on the cloud, your employees can interact with their schedules and each other anytime, anywhere.

And how does easy scheduling optimization sound? You can use Homebase's templates or auto-scheduling based on your team's latest availability, sales forecasts, and [labor targets](#).

STEP 2:

Track and record employee hours

Your flexibility only goes up when you pair the app with [Homebase's Time Clock](#). It will automatically track hours, breaks, and overtime, producing automated, accurate timesheets for you each week. By seeing whose time slots have the highest sales and at what times, you can easily determine when you need to [staff up](#).

Labor costs are easier to control thanks to Homebase's automatic alerts when an employee approaches overtime or forgets to clock out, and no-shows are less likely to occur thanks to upcoming shift alerts and late clock-in alerts. You won't lose sight of how much everyone on your team has worked—and more importantly, how much to pay them.

STEP 3:

Automate and simplify the payroll process

Let's not sugarcoat it. Payroll can be a huge pain. It's incredibly time consuming to track everyone's hours, calculate wages, withhold deductions for things like taxes, Social Security, and Medicare, and do it all in a way that's compliant with local, state, and federal [labor laws](#). Mistakes can be super common, especially if you're doing it all manually. Not only do payroll errors mean frustration and confusion for everyone involved, they lead to [inaccurate pay](#) and incorrect tax filings.

Homebase frees you from these headaches, giving you payroll processing freedom. In a few clicks, [Homebase Payroll](#) lets you convert hours, breaks, overtime, and time off into wages, then pay your team and file your taxes—all in one place. The result? You can kiss payroll pain goodbye and keep everything organized and compliant with labor laws. Automatic payroll makes things effortless. Period.

STEP 4:

Source, recruit, and onboarding new employees all in one place

A business is only as strong as its team. In the early years when you're finding your footing, hiring the best people—and training them properly—is one of the biggest things you'll thank yourself for.

Homebase's [hiring and onboarding software](#) was built for hassle-free hiring. Start with our library of pre-written, customized job descriptions, post your job for free to top online job boards, promote it with paid boosts, and track applicants—all within the app. But it doesn't stop there! You can also use Homebase to message and pre-screen applicants and schedule interviews. When you're bringing new hires on board, you can even send automated welcome packets to them with things like employee handbooks, policies, or training.

Homebase lets your employees e-sign their [payroll forms](#), meaning you don't have to manually enter their tax or bank information, and it will tell you when a document has been reviewed or signed so you're not left with any loose ends.

STEP 5:

Keep your team connected, aligned, and collaborative

Even if you've built a stellar group of people, things can go downhill fast without the same stellar communication.

Homebase's [built-in messenger tool](#) makes it easy to stay connected. New team members get added automatically, and you can send messages to individuals, groups, or your entire team.

When it comes to sharing important information, the app can automatically send reminders for shifts, clock outs, and schedule updates. Adding a note to a shift is just as easy, and you can also collect shift feedback to keep tabs on how your team is feeling. Letting your team give each other public shoutouts for a job well done is another great morale-booster, empowering them to feel like a cohesive, supportive team.

STEP 6:

Retain your best employees with perks, recognition, and rewards

As a new business owner, keeping your team motivated should be high on your priority list. Supporting your employees with [public praise](#) is one of the simplest ways to show that you notice and care about their efforts. Homebase's [shoutout feature](#) lets you post thanks for an employee's good work on the app dashboard where the whole team can see it. You can then reward them with accompanying time off, with a free meal, or with [bonus pay](#). Bonus pay can also be a recurring or one-off payment, and [Homebase payroll](#) lets you calculate both kinds.

Homebase also makes it easier to give your employees happiness-boosting perks like [flexible working hours](#) or even early access to their wages. With [Homebase Cash Out](#), it's simple to give your team early access to part of their paycheck in advance if they need to deal with an emergency expense. You're not on the hook for any of the wages we advance, and it doesn't impact payroll.

STEP 7:

Automate your paperwork and stay compliant with HR regulations

No dedicated HR person? Not a problem. Homebase [HR tools](#) are made for teams like yours.

Set up your roster and store employee information in the app including emergency contacts, certifications, birthdays, and more. Homebase can then guide you through setting up [time-off policies](#), tracking accruals and balances for sick and vacation leave. You'll also be able to gain control over paid time off by setting rules black-out dates, time-off request limits, and advance notice policies—all while syncing with payroll.

Not only do Homebase HR tools keep you organized, they also help keep you [compliant](#). Set break and overtime rules to comply with local, state and federal labor laws, and get notified when laws change.

When tough HR questions come up (and sooner or later, they will!), know that Homebase has a team of HR Pros ready to help. You can talk live with a certified HR advisor about specific questions, or send over a policy for review. Plus, you can access resources from an extensive HR resources library full of templates, guides, and training. So even as a new business owner, you can rest easy knowing you have the support and guidance you need.