



| **Scheduling**
powered by  **SLING**

User Guide for Admins & Managers

Updated as of November 5, 2021

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Section 1: What Data Syncs

Employee Data

Send employee names along with their assigned positions, locations, and wages created on Toast to Sling and keep the changes up-to-date.

Timesheets

Send timecards created on Toast to Sling. Compare the scheduled and actual hours and costs, analyze discrepancies, and export timesheets for processing payroll.

Sales

Send sales data straight from your Toast POS to Sling. Compare projected and actual sales and labor %, and optimize the cost of labor by building better schedules that respect the margins you are after.

Schedules

Send shift data from Sling to Toast, so you can enforce scheduling as employees use the time clock on Toast POS and prevent time theft.

Section 2: Creating your Sling Account

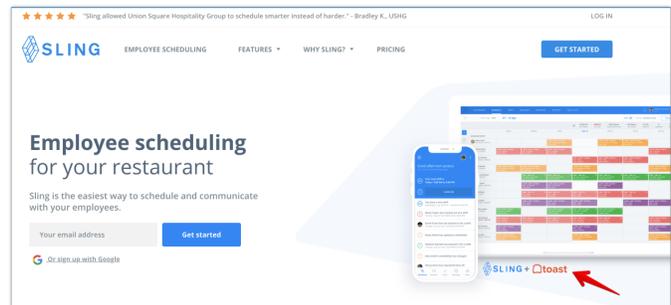
Steps to Creating Account

Step 1

First, you'll need to make sure you're live on Toast Point of Sale (POS). **This is required** - the product won't work properly until you're live on Toast POS!

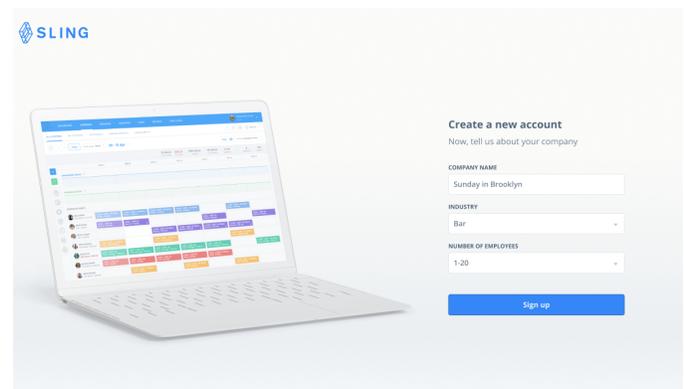
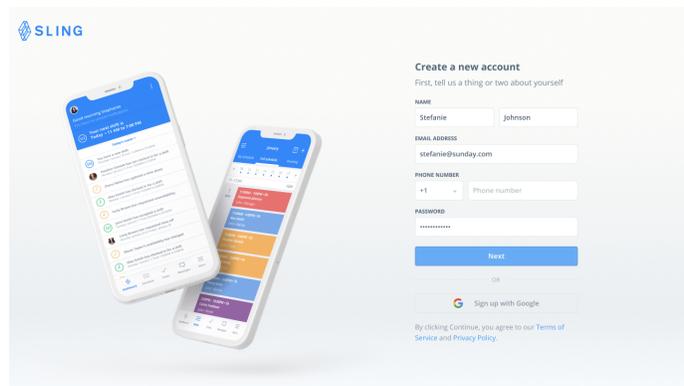
Step 2

Visit the [Toast<>Sling landing page](#), select "Get Started," and set up your Sling account. **You must go through the landing page to be properly registered!**



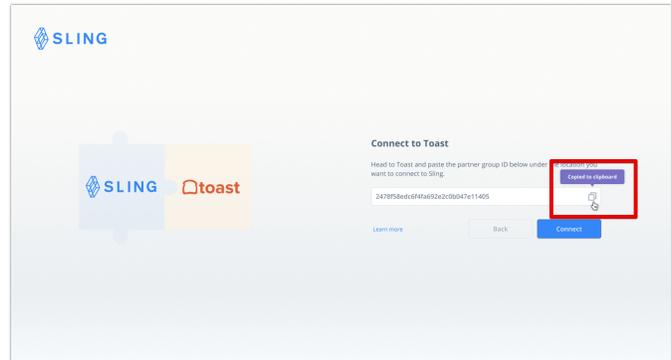
Step 3

The next two screens will ask you to enter your business information to create the account.



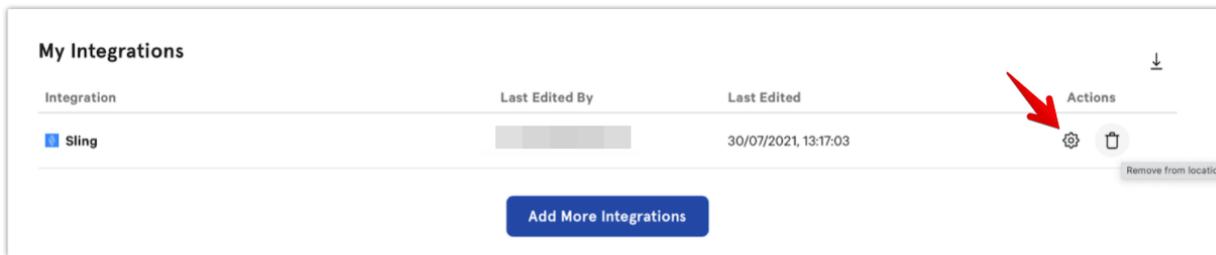
STEP 4

Next, you'll get a **Group ID**, which you will copy from Sling into Toast to integrate the two accounts. Click Connect and you will be redirected back to Toast so you can apply it under the Sling integration settings.



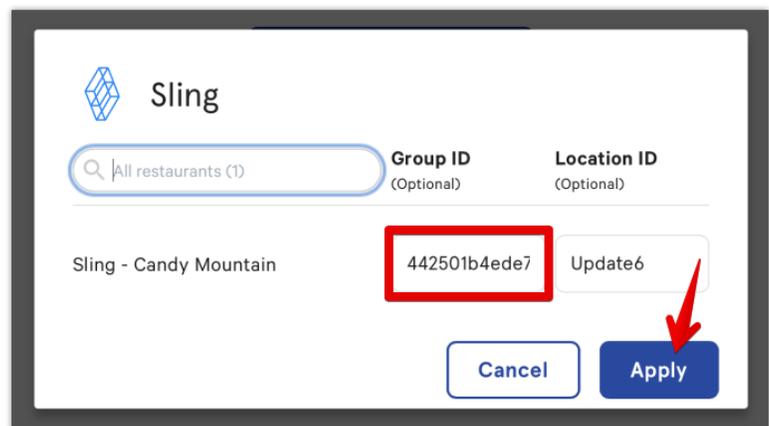
STEP 5

Back in Toast, go to [Toast Partner Connect](#), within your Toast account, and select the [Configure integrations](#) page. Click on the gear icon next to the Sling integration.



STEP 6

Under the **Group ID**, add the code you copied from Sling and Apply.



🎉 Congratulations, your two accounts should be connected now. 🎉

Sling will start importing employees with their email, job(s), location, and wages as well as timesheets and sales. Sales data up to 30 days in the past can be synced. New employees added in Toast will be automatically synced with the next update. Beyond the initial integration sync, updates to wages, timesheets, and sales in Toast will also be updated in Sling with the next sync. However, note that deleting an employee or timesheet in Toast will not remove the data from Sling.

A few other things to note about imported data:

- Changes to an employee's email address in Toast cannot be updated automatically. This will also need to be updated in Sling.
- Updated wages will currently show today's date as the effective date. The integration is not able to determine a "planned" effective date as set in Toast.
- In case of a refund or voided payment, we **will** update previously imported sales.
- Jobs in Toast = Positions in Sling. These are only imported and applied to employee profiles during the initial setup, but it is in our plans to update them like other data coming from Toast.

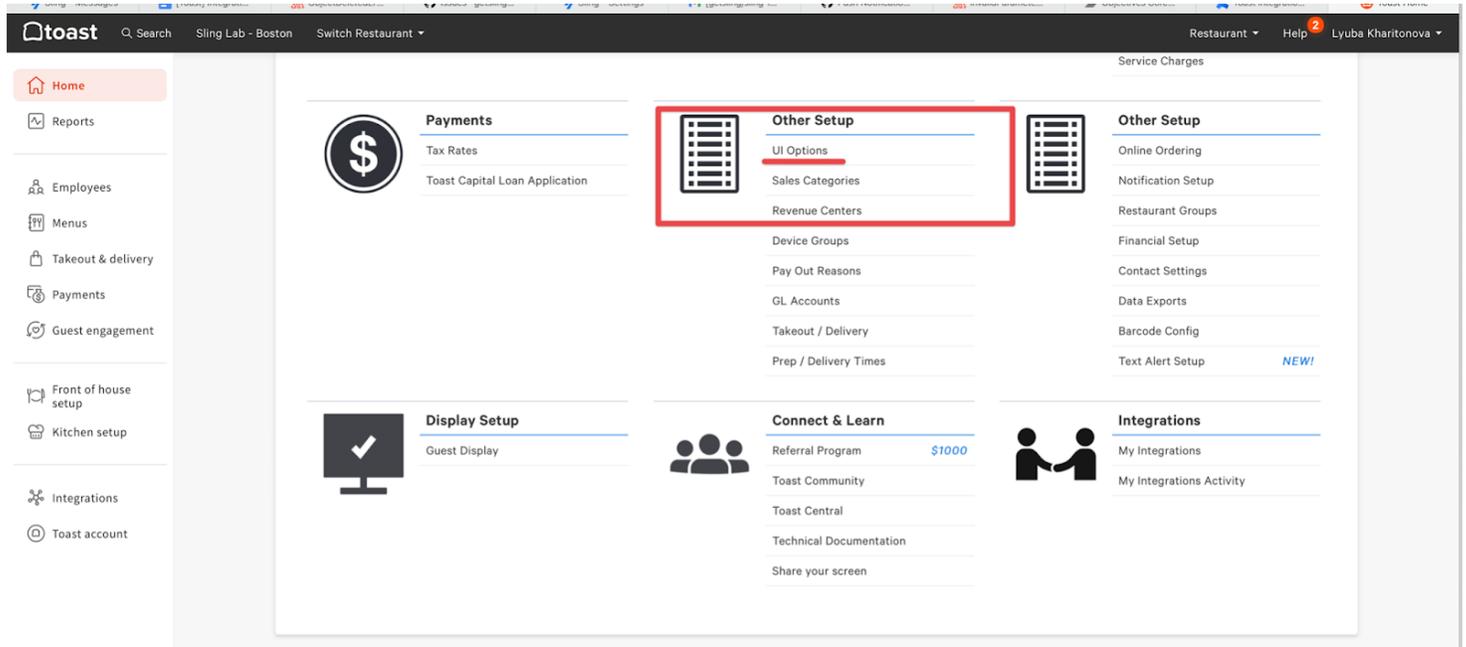
Section 3: Schedule Enforcement

Your schedule data in Sling will be exported to Toast to allow you to prevent early clock-ins on your Toast POS, if you choose.

Steps to configuring schedule enforcement

STEP 1

To set up schedule enforcement, go to your Toast account, and look for "[UI Options](#)" under "Other Setup."



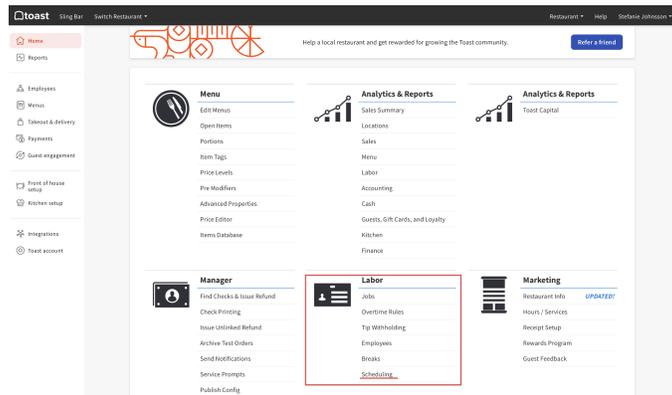
STEP 2

Scroll down to the "Time Clock" section and enable the "Enforce Scheduling" option. Save & Publish your changes.

Time Clock

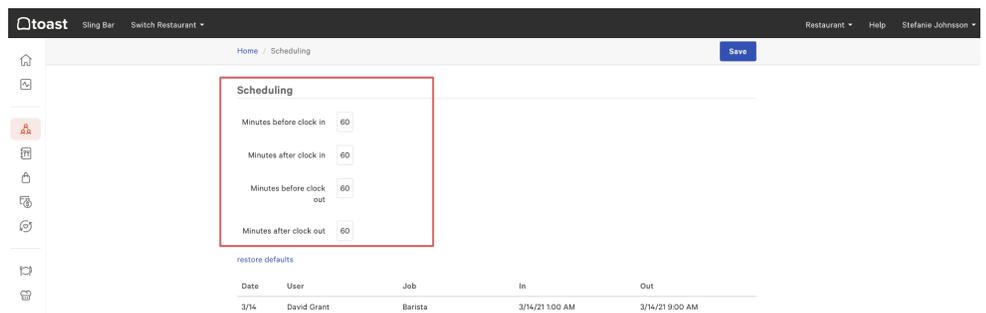
- Print Clock Slips Enabled - slips are printed automatically at clock in and clock out
 Disabled
- Enforce Scheduling Require manager approval for clock in / clock out when employees are not on schedule. Set this to No unless your scheduling software is integrated with Toast.
 Yes
 No
- Show Time? Enabled - Display the time on Time Clock screen
 Disabled
- Time Entry Rounding Scheme All time entries are added together, then rounded for total hours
 Each time entry is rounded, then added together for total hours

How to adjust schedule reinforcement settings



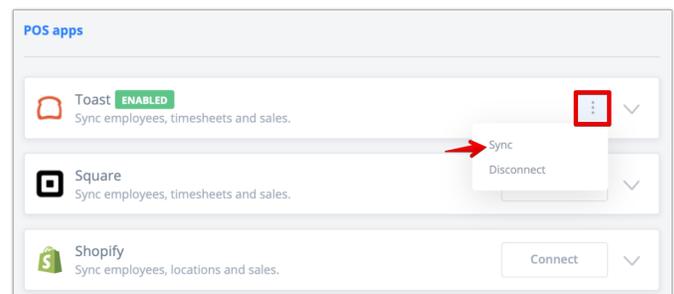
Go back to the main page on Toast and then go to "[Scheduling](#)" under "Labor"

From there, you can adjust your preferences in terms of early clock-in/out and late clock-in/out.



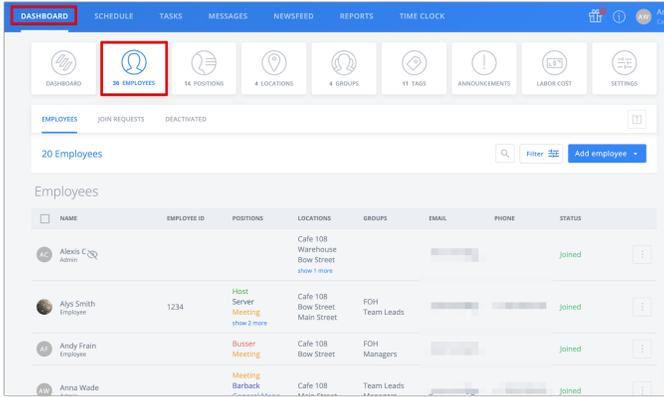
See this [article on schedule enforcement](#) for more details.

After the initial integration, Sling will automatically sync data every hour, but you also have the ability to manually sync new info as often as every 5 minutes. To do this, access the [integrations tab](#) in your settings, and click the options button under Toast.



Section 4: Verifying the imported data

After connecting Sling and Toast, you can check to see that information is being synced properly.

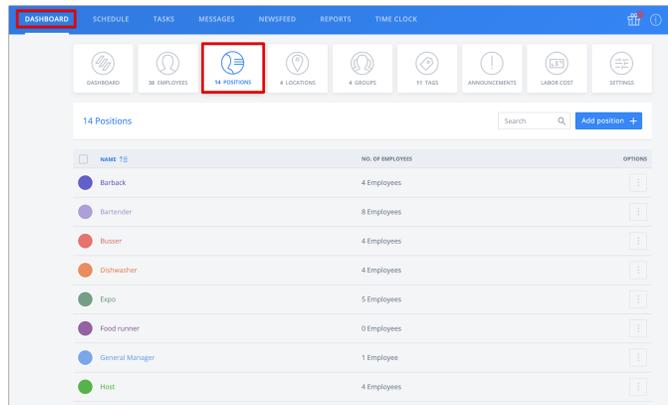


Employees

Go to the Employees tab in Sling to review the imported profiles and check for accuracy. Their names, email addresses, and assigned positions, locations, and wages will be imported and assigned in Sling.

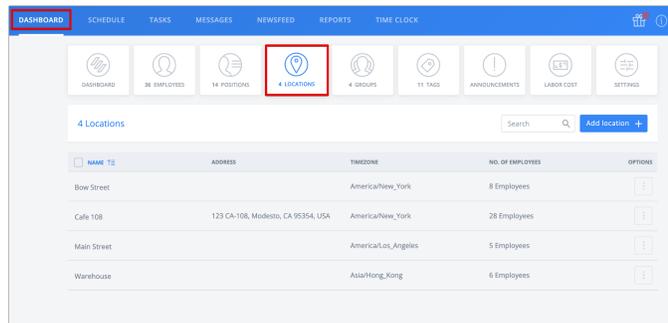
Positions

Any positions that were listed in your Toast account will also be added to Sling under the positions tab (in addition to being added within employee profiles). New positions added on Toast will be imported to Sling with the next sync. **Positions created in Sling are not exported to Toast.**



Locations

Locations from your Toast account will also be imported and listed in Sling under the locations tab. New locations added in Toast after the initial integration will be imported to Sling, and will prompt the locations mapping tool, so you can be sure the locations in Sling are properly connected to the ones in Toast. **Locations created in Sling are not exported to Toast.**



Wages

Any wages assigned to your employees in Toast will also be carried over to Sling. To verify that their wages have been imported and applied properly, check the Labor cost tab.

NAME	LOCATIONS	POSITIONS	WAGES	TYPE
Alaina Christensen	Main Street	Server Kitchen Supervisor Dishwasher	\$16.00 Employee base wa... \$14.00 Position base wage \$10.00 Position base wage	Hourly
Alexis C	Cafe 108 Warehouse Bow Street			
Alys Smith	Cafe 108 Bow Street Main Street	Host Server Meeting	\$8.00 Position base wage \$4.55 \$12.00 Employee base wa... show 2 more	Hourly
Andy Frain	Cafe 108 Bow Street	Busser Meeting	\$100,000.00	Salary

FULL NAME	DATE	POSITION	CLOCK-IN	CLOCK-OUT	BREAK	ACTUAL	DIFFERENCE
Anna Wade	Sep 26, 2021	Meeting	9:00 AM	10:00 AM	-	1.00	0
Michael Schaeffer	Sep 26, 2021	Kitchen Supervisor	9:02 AM	5:06 PM	-	8.07	0.07
Janet Duan	Sep 26, 2021	Prep	8:57 AM	5:09 PM	-	8.20	0.20
Michael Banks	Sep 26, 2021	Kitchen Supervisor	1:58 PM	10:16 PM	-	8.30	0.30
Lucas Kane	Sep 26, 2021	Barback	2:41 PM	12:01 AM	-	9.33	1.33
Karen Verrato	Sep 26, 2021	Host	3:04 PM	8:46 PM	-	5.70	-0.30
Mitchell Jackson	Sep 26, 2021	Line Cook	3:55 PM	12:24 AM	-	8.48	0.48
Kim Bovee	Sep 26, 2021	Bartender	4:00 PM	12:23 AM	-	8.38	0.38

Timesheets

Any clock in and clock out activity recorded in Toast will sync to Sling, and can be reviewed under the Time clock tab:

The timesheet data rolls up into the payroll report, where you can review total hours and gross wages for the pay period.

FULL NAME	EMPLOYEE ID	HOURS	REG. HOURS	OT HOURS	HOLIDAY HOURS	PTO	TOTAL WAGE
Karen Verrato	-	5.70	5.70	-	-	-	\$45.60
Kim Peters	-	8.38	8.38	-	-	-	\$26.23
Lucas Kane	-	33.33	24.02	9.32	-	-	\$156.90
Michael Banks	-	8.30	8.00	0.30	-	-	\$118.30
Michael Schaeffer	-	8.07	8.00	0.07	-	-	\$113.40
Missy Sams	-	-	-	-	-	-	\$0.00
Mitchell Jackson	-	8.48	8.40	0.08	-	-	\$0.00
Paul Wright	-	-	-	-	-	-	\$0.00

Sales

Your actual sales data from Toast is imported to Sling, and will be populated in the sales report under the "actual sales" columns.

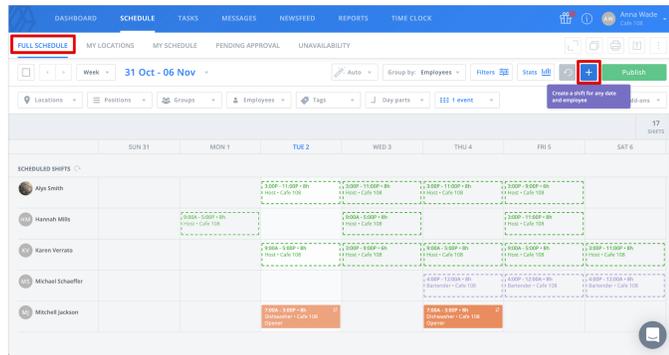
Note that anyone assigned to the **manager** role in Sling will need to be given access to labor cost data by an admin in order to see wage info, sales data, and access the labor, payroll, and sales reports. An admin can grant access under the [labor cost settings tab](#).

DATE	PROJECTED SALES	ACTUAL SALES	DIFF. SALES	PROJECTED LABOR %	ACTUAL LABOR %	DIFF. LABOR %
Oct 25, 2021	\$0.00	\$2,118.00	\$2,118.00	0	0	0
Oct 26, 2021	\$0.00	\$2,105.00	\$2,105.00	0	0	0
Oct 27, 2021	\$0.00	\$2,479.00	\$2,479.00	0	0	0
Oct 28, 2021	\$0.00	\$3,458.00	\$3,458.00	0	0	0
Oct 29, 2021	\$0.00	\$3,268.00	\$3,268.00	0	0	0
Oct 30, 2021	\$0.00	\$4,543.00	\$4,543.00	0	0	0
Oct 31, 2021	\$0.00	\$3,693.00	\$3,693.00	0	0	0
GAFF HR	\$163,000.00	\$67,500.00	-\$95,500.00	10.36%	15.73%	5.37%
Oct 01, 2021	\$9,000.00	\$0.00	-\$9,000.00	3.81%	0	-3.81%

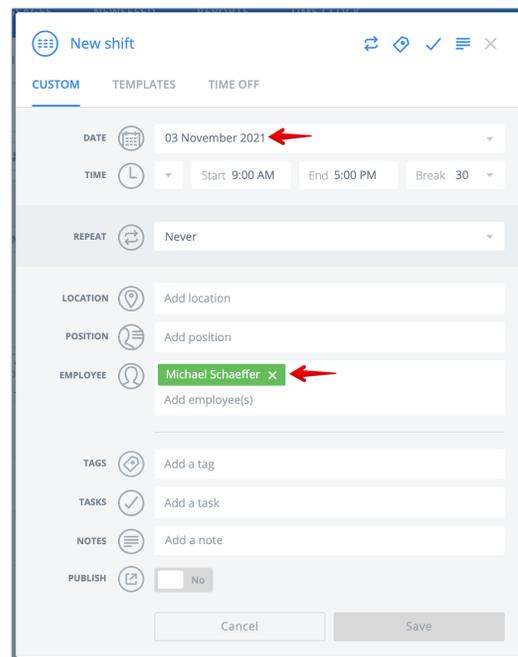
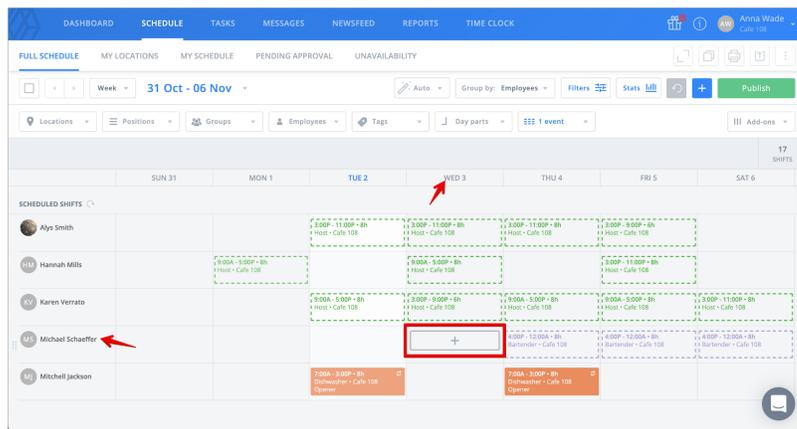
Section 5: Creating schedules

Once you have ensured that your employees, wages, positions, and locations have been synced to Sling, you can get started with scheduling. The shifts you add here can be sent to Toast so you can make sure employees are adhering to their schedules.

Using the full schedule view lets you see all schedule data. You can add a new shift by clicking the blue Create shift button near the top right of the screen.



You can also hover over the calendar to see an add button appear. Depending on where you click (specific employee's row, specific date, under a grouping for a location or position, etc), some information may pre-populate into the shift for you.



A time, location, and position are required to create a shift, while all other details are optional.

If you leave the employee field blank, this will create an unassigned shift, which helps you plan out the coverage you need. Unassigned shifts can be assigned later, or made available for employees to apply to.

There are many scheduling features and options, but this video overview can help you understand all the functions that are available and how to use them:

[Video: How to schedule shifts in Sling](#)

If you'd like even more info on scheduling, you can also check out this collection of articles from our [Help Center](#):



[Schedule](#)

Section 6: Reviewing and editing timesheets

Any hours recorded in Toast will be synced to Sling allowing you to review the data and pull reports. Changes to timesheets on the Toast side will be imported with the next sync and overwrite anything that was previously imported.

Under the Time clock tab, you can select the range you wish to review.

FULL NAME	DATE	LOCATION	POSITION	CLOCKED IN	CLOCKED OUT	BREAK	ACTUAL	DIFFERENCE
ALYS SMITH	Sep 28, 2021	Cafe 108	Expo	3:00 PM	11:00 PM	-	8.00	0
ANNA WADE	Sep 26, 2021	Cafe 108	Meeting	9:00 AM	10:00 AM	-	1.00	0
JANET DIXON	Sep 26, 2021	Cafe 108	Prep	8:57 AM	5:09 PM	-	8.20	0.20
KAREN VERRATO	Sep 26, 2021	Cafe 108	Host	3:04 PM	8:46 PM	-	5.70	-0.30
KIM PETERS	Sep 26, 2021	Cafe 108	Bartender	4:00 PM	12:23 AM	-	8.38	0.38
LUCAS KANE							9.33	1.33

You can also apply filters to focus on specific information like locations, positions, or groups.

FULL NAME	DATE	LOCATION	POSITION	CLOCKED IN	CLOCKED OUT	BREAK	ACTUAL	DIFFERENCE
ALYS SMITH	Sep 28, 2021	Cafe 108	Expo	3:00 PM	11:00 PM	-	8.00	0
ANNA WADE	Sep 26, 2021	Cafe 108	Meeting	9:00 AM	10:00 AM	-	1.00	0
JANET DIXON	Sep 26, 2021	Cafe 108	Prep	8:57 AM	5:09 PM	-	8.20	0.20
KAREN VERRATO	Sep 26, 2021	Cafe 108	Host	3:04 PM	8:46 PM	-	5.70	-0.30

The information can be printed or exported, as well. And the data recorded here will also populate into the payroll report for easy processing in your payroll software.

NEWSFEED REPORTS **TIME CLOCK** Anna Wade Cafe 108

Group by: Employees Filter Export Print Settings

Employees Tags Statuses Columns

POSITION	CLOCKED IN	CLOCKED OUT	BREAK	ACTUAL	DIFFERENCE
			-	8.00	0
Expo	3:00 PM	11:00 PM	-	8.00	0
			-	1.00	0
Meeting	9:00 AM	10:00 AM	-	1.00	0

Section 7: Running payroll

Once hours are logged via timesheets, you can review and export the data under the payroll report.

DASHBOARD SCHEDULE TASKS MESSAGES NEWSFEED **REPORTS** TIME CLOCK Grace Campoll Sling

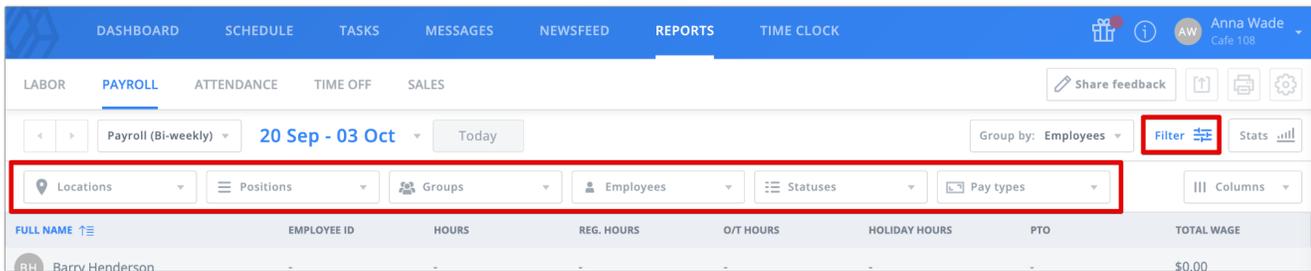
LABOR **PAYROLL** ATTENDANCE TIME OFF SALES Share feedback Export Print Settings

Payroll (Bi-weekly) 13 - 26 Oct Today Group by: Employees Filter Stats

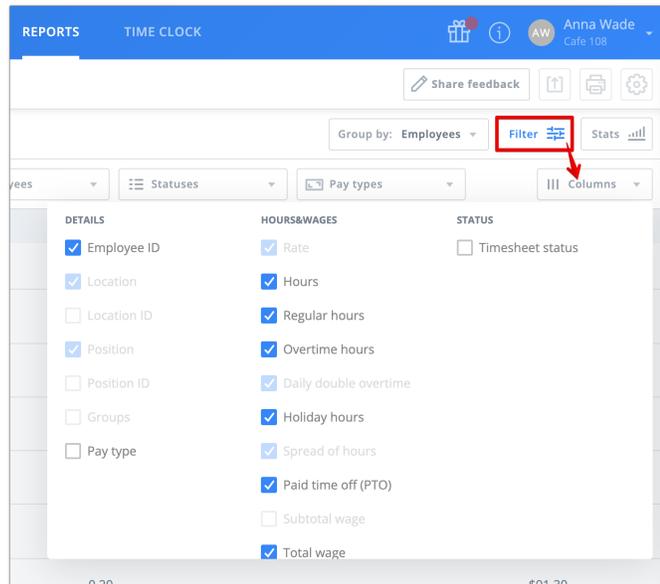
Locations Positions Groups 44 employees Statuses Pay types Clear filters Columns

FULL NAME	HOURS	REG. HOURS	O/T HOURS	PTO	TOTAL WAGE	PAY TYPE
[blurred]	81.08	81.08	-	-	\$0.38	Hourly
[blurred]	82.40	79.70	2.70	-	\$1,675.00	Hourly
[blurred]	30.88	30.88	-	8.00	\$710.31	Hourly
[blurred]	64.70	64.70	-	-	\$0.00	Hourly
[blurred]	70.48	68.55	1.93	-	\$714.50	Hourly
[blurred]	82.47	82.47	-	-	\$1,726.02	Hourly
[blurred]	77.07	77.00	0.07	8.00	\$771.00	Hourly
[blurred]	44.95	44.95	-	16.00	\$1,219.00	Hourly

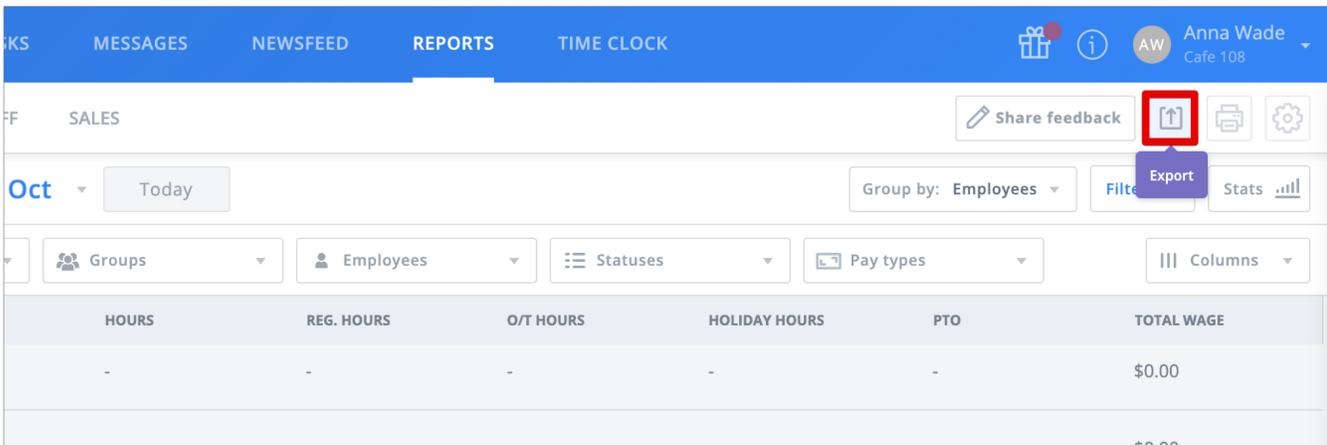
Filters can be applied here, just like in your timesheet report.



You can also choose which columns populate in the report, in case there is any data that isn't relevant to you.



Then, export the data in a .csv or .xls file for easy processing in your company's payroll application.



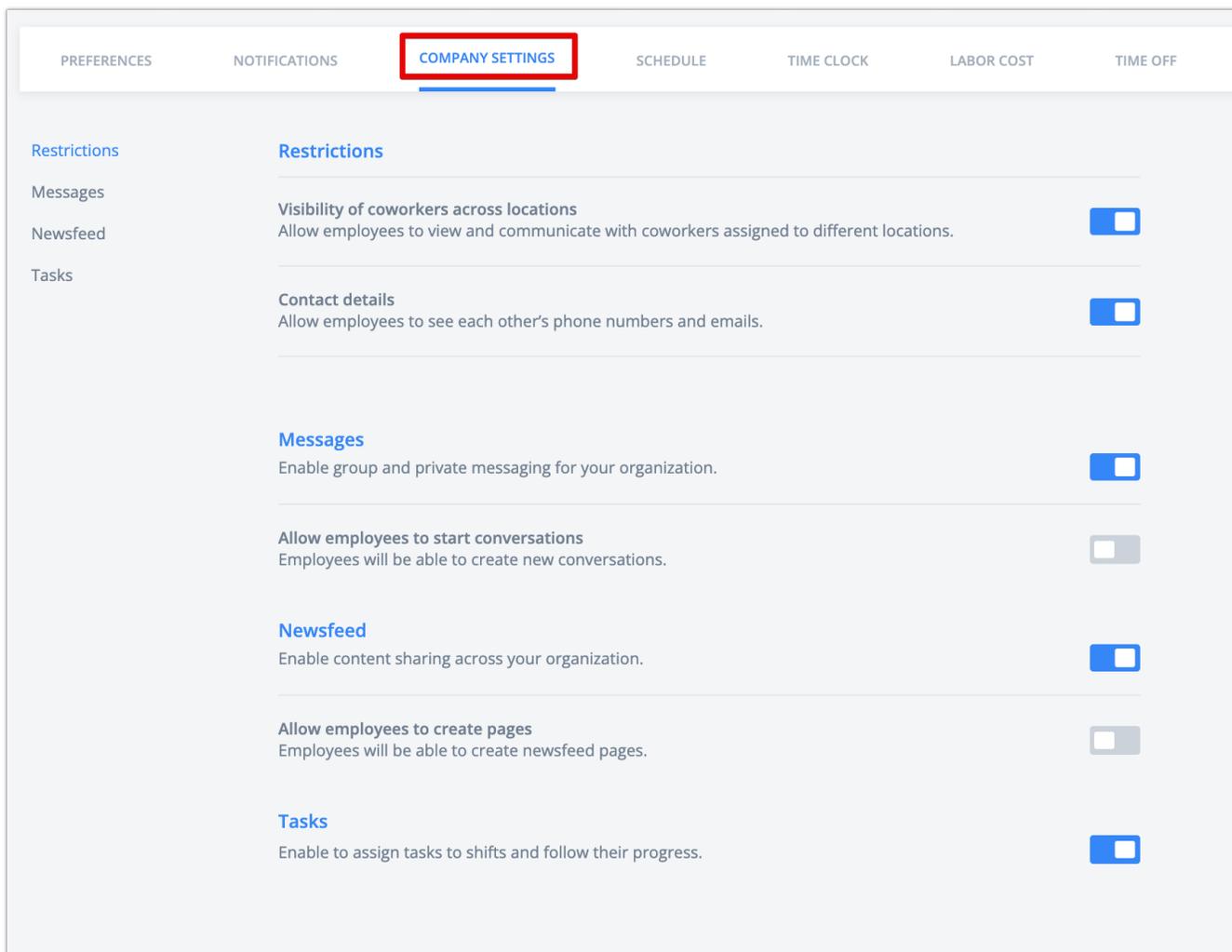
Section 8: Settings Adjustments

Adjusting company settings

Before fully implementing Sling, you may want to double-check these settings. They allow you to make sure your schedule is laid out in a way that matches your business needs and that your employees are only seeing the information you want them to see. **Note that company and schedule settings can only be adjusted by an admin of the Sling account.**

Your [company settings](#) apply to everyone within your company, and they allow you to define which features and information are available to your employees.

This includes access to coworkers' information and the messaging, newsfeed, and tasks features.



PREFERENCES	NOTIFICATIONS	COMPANY SETTINGS	SCHEDULE	TIME CLOCK	LABOR COST	TIME OFF
Restrictions						
Messages	Restrictions Visibility of coworkers across locations Allow employees to view and communicate with coworkers assigned to different locations.		<input checked="" type="checkbox"/>			
Newsfeed	Contact details Allow employees to see each other's phone numbers and emails.		<input checked="" type="checkbox"/>			
Tasks	Messages Enable group and private messaging for your organization.		<input checked="" type="checkbox"/>			
	Allow employees to start conversations Employees will be able to create new conversations.		<input type="checkbox"/>			
	Newsfeed Enable content sharing across your organization.		<input checked="" type="checkbox"/>			
	Allow employees to create pages Employees will be able to create newsfeed pages.		<input type="checkbox"/>			
	Tasks Enable to assign tasks to shifts and follow their progress.		<input checked="" type="checkbox"/>			

Adjusting schedule settings

Your schedule settings also apply to everyone in the company, and allow you to adjust the appearance of the schedule as well as which scheduling features are accessible.

These settings include, hours of operation, first day of the work week, schedule visibility for employees, breaks, and more.

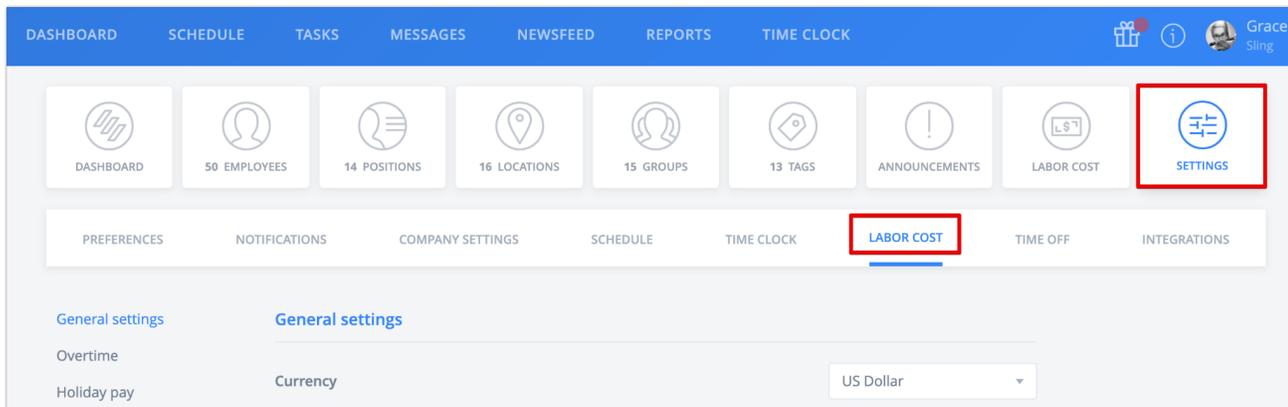
The screenshot displays the 'SCHEDULE' settings page in the Toast interface. The top navigation bar includes tabs for PREFERENCES, NOTIFICATIONS, COMPANY SETTINGS, SCHEDULE (highlighted), TIME CLOCK, LABOR COST, and TIME OFF. The main content area is organized into three sections:

- Schedule settings:**
 - Break:** A toggle switch is turned on.
 - Shift acceptance:** 'First day of the week' is set to 'Sunday'.
 - Shift exchanges:** 'Hours of operation' are set from '12:00 AM' to '12:00 AM'.
 - Unavailability:** 'Cutoff time for overnight hours' is turned on.
 - Labor compliance:** 'Visibility of schedules for employees' is turned on, with a dropdown set to 'Employees can view schedule for their position within their own location'. 'Visibility of time off and unavailability' is turned off. 'Visibility of schedules for managers' is turned off.
- Breaks:**
 - A toggle switch to 'Enable the option to add a break duration to your employee's shifts' is turned on.
 - 'Paid or unpaid breaks' is set to 'Paid'.
 - 'Default break duration on shifts' is set to '30 Minutes'.
 - 'Shift acceptance' (allowing employees to confirm or deny schedules) is turned off.
 - Shift exchanges and available shifts:**
 - 'Allow employees to give away their shifts' is turned on.
 - 'Allow employees to swap shifts' is turned on.
 - 'Restrict offers and swaps by location and position' is turned off.
 - 'Automatically approve applicants' is turned off.
 - Unavailability:** A toggle switch to 'Allow employees to set and edit their unavailability' is turned on.
 - 'Approval' (requiring manager approval for unavailability changes) is turned on.
- Labor compliance:**
 - 'Clopening' (ensuring adequate rest time) is turned on.
 - 'Rest hours between shifts' is set to '10 Hours'.

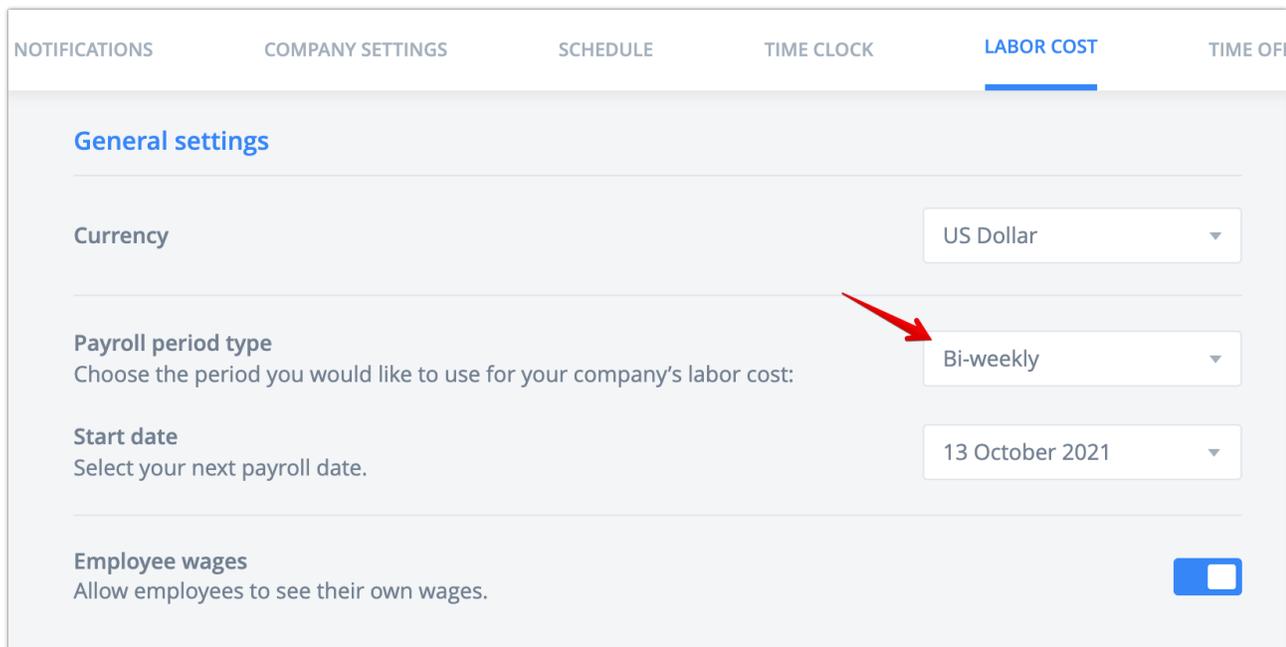
Setting up labor cost functions

In addition to the company and schedule settings, you also want to make sure your labor cost settings match your business needs. These will dictate how estimated wages are calculated and help keep you within your labor budget.

Under [Settings > Labor cost](#), you can define your pay periods, set overtime rules, define labor cost % goals, and provide labor cost access to managers.



The pay period setting will designate the dates that populate when you use the “payroll” date range within timesheets and reports.



Sling offers weekly, daily, and double daily overtime options, so you can be sure you're keeping track of hours accurately and scheduling within your budgets.

NOTIFICATIONS COMPANY SETTINGS SCHEDULE TIME CLOCK **LABOR COST** TIME OFF

Overtime

Weekly overtime

Weekly overtime starts after 40 hours at rate 1.5. Hours @ RATE X

Daily overtime

Daily double overtime
Employees will receive 2X their regular pay after 12 hours in a day.

Holiday pay
Set a higher pay rate for shifts worked on holidays.

Holiday rate @ RATE X

If you offer extra pay for holidays on which your business is open, you can enable the holiday pay setting and define the extra rate.

NOTIFICATIONS COMPANY SETTINGS SCHEDULE TIME CLOCK **LABOR COST** TIME OFF

Holiday pay

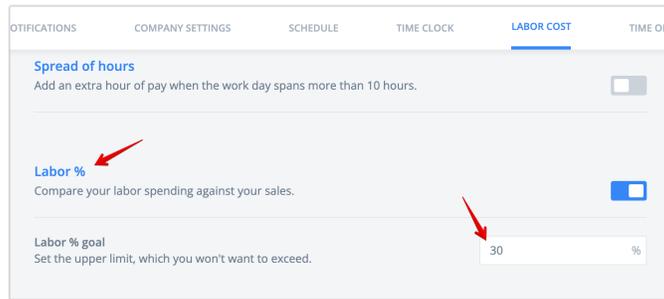
Set a higher pay rate for shifts worked on holidays.

Holiday rate @ RATE X

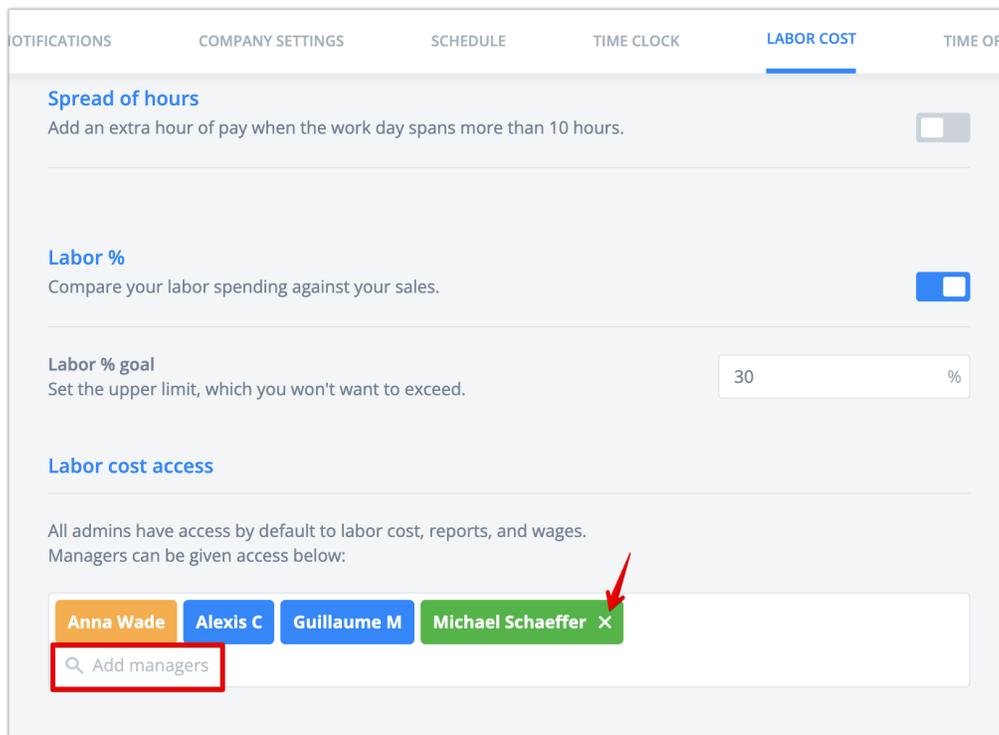
Spread of hours
Add an extra hour of pay when the work day spans more than 10 hours.

Then, mark any holidays on your schedule, and Sling will calculate the extra pay for any hours logged via the time clock.

Enable the labor % goal to set the maximum labor as a percentage of sales that you want to spend, and get alerts for exceeding it when scheduling.



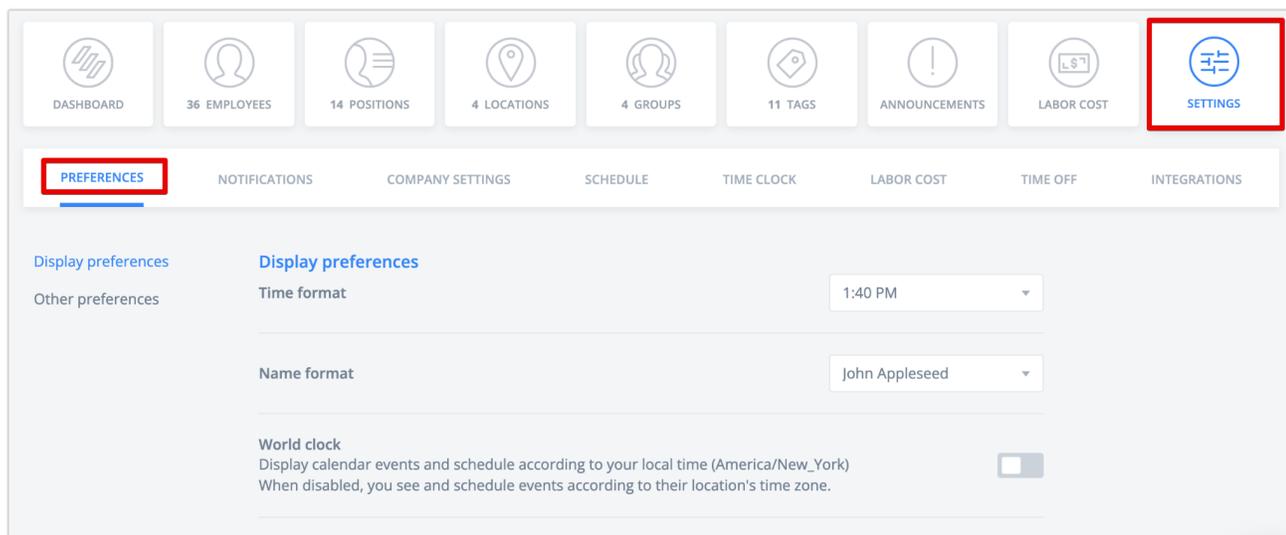
By default, only admins can view labor cost data on the schedule and in reports. If any managers should have access to the information, you can add them here. Note that managers will only see data related to employees assigned to the same location, and they will never see wage info for other managers or admins. You can spot any managers who have access, as they will have an "x" next to their name, so they can be removed. Admins cannot be removed from having access.



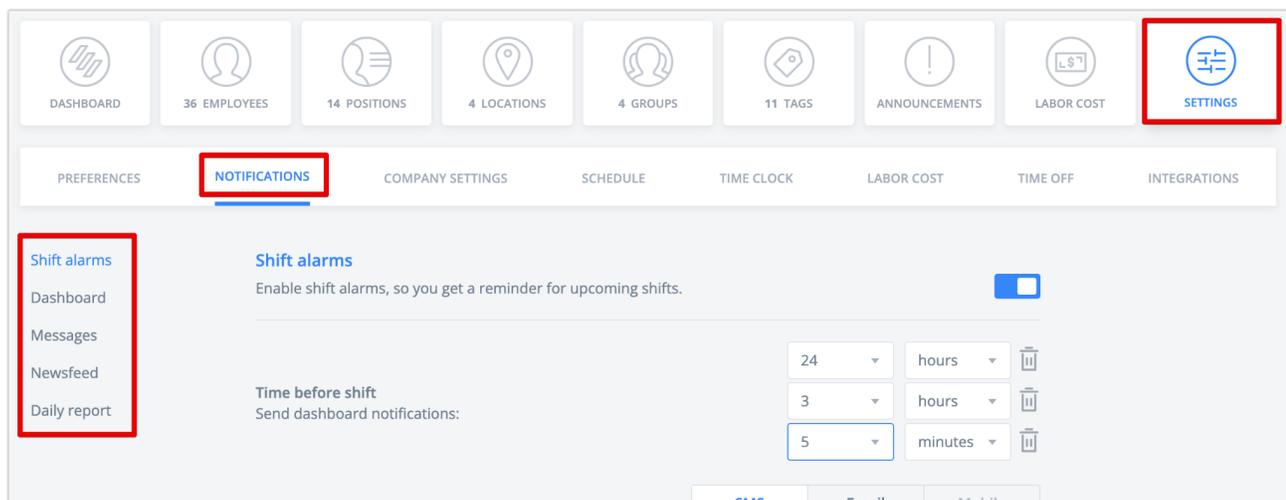
Setting preferences and notifications

In addition to all these company-wide settings, you also have some options to customize the appearance of your own account. These settings will not affect other users.

Under [Settings > Preferences](#), you can choose the time format, name format, appearance of shifts on the schedule, and more.



The notifications tab is where you will choose which alerts you wish to receive, and how to receive them.

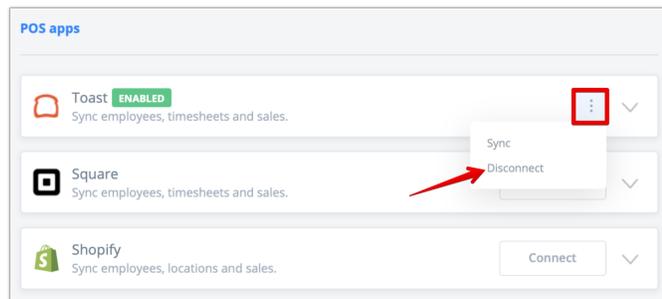


- Shift alarms will send up to three reminders of an upcoming shift, and can be set to arrive via email, push notification, or SMS (text) message. **Shift alarms are the only notification type available via SMS.**
- Dashboard notifications include most important account updates like schedules, time off requests, time clock reminders and activity, and more. These notifications always appear on your Sling dashboard, but choosing another delivery method ensures you aren't missing important changes.
- Message notifications can also keep you on top of important details, but even if they are not enabled, you will see new message badges in your Sling account. If enabled, you can choose whether you are notified always, or only when mentioned or directly messaged.
- Like message notifications, Newsfeed notifications help you stay in the loop with communication, and you can choose whether you are always notified of activity on pages you follow, or only when you're mentioned.

Section 9: Removing the integration

If at any point you want to disable the integration, you can do so from Sling or from Toast. Disabling the integration will not remove any existing data from Toast or Sling, it will just prevent further syncing. You can reestablish the integration to pick right up where you left off, as well.

In Sling, go to [Settings](#) > Integrations, then click the options button next to Toast and disconnect.



In Toast, go to the [Integrations tab](#) > [Configure Integrations](#), then click the trash can icon to remove it.

