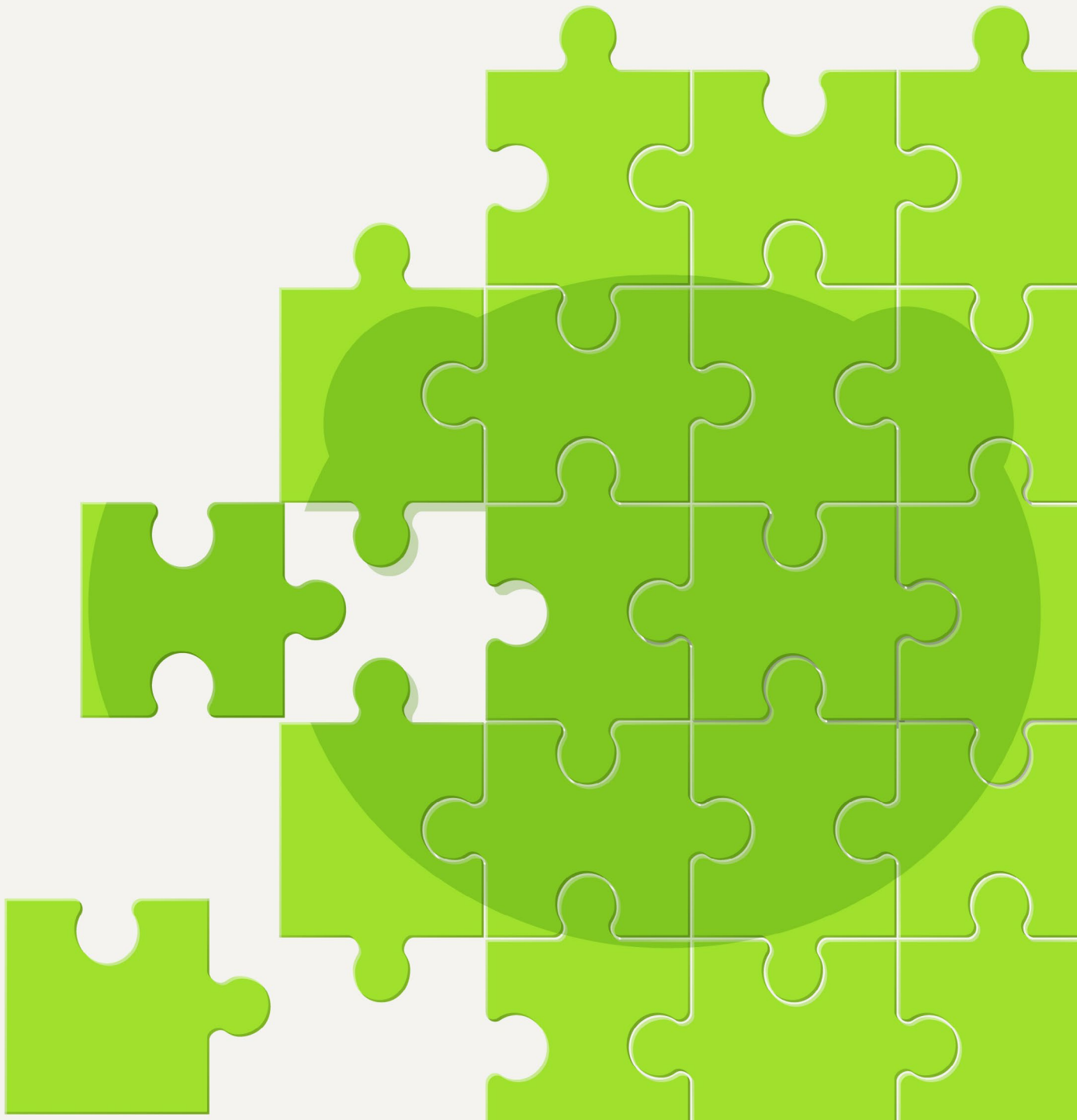
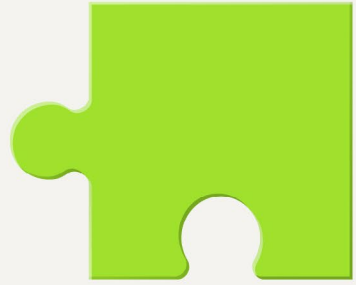


bambooHR®

# 100+ Ways

TO CUSTOMIZE BAMBOOHR



# No matter how many features an HRIS might boast, it can't do much if it doesn't **fit your organization's unique needs.**

With that in mind, BambooHR offers extensive options for customization to ensure you're getting an HR solution that's truly **all-in-one**.

In this ebook, you'll find over **100 ways to customize BambooHR**. Whether you're looking for specialized data tracking, advanced payroll functions, or personalized engagement tools, BambooHR works with you to provide perfect-fit solutions.

“The BambooHR ability to configure and customize to our needs is the **simplest method of any I have experienced.**”

Rob Scott | Chief Operating Officer | Smart WFM





# Data & Reporting

BambooHR makes it easy to gather all the data you need and manage it exactly how you want. With extensive data field options and custom reporting, BambooHR empowers you to create a centralized, **comprehensive HR database** that's unique to your organization.

## Standard Fields and Tables

With BambooHR, adding custom data fields and tables is simple. Start with the Standard Fields Library, which lists dozens of pre-made fields and tables you can add or remove in your account.

The Standard Fields Library features a wide range of information relevant to HR, including options for driver's licenses, food allergies, professional certifications, and more—so you don't have to waste time building out fields to meet your basic data needs.

## Custom Fields

Every organization has its own unique data requirements, which is why BambooHR makes it easy to add any custom field you might need by going through the Employee Profile or Settings.

From tracking equipment to documenting employees' favorite foods, custom fields can collect any data point you need.

Options for field types include:

- Checkbox
- Currency
- Date
- Number
- Percentage
- Phone number
- Information (set text that appears on each employee's profile)
- Single line of text
- Multi-row paragraph
- Section header
- Dropdown list
- Multiple-selection dropdown list
- Employee names dropdown list
- State or province dropdown list (for US, Canada, UK, and Australia)

## Custom Calculations

In addition to regular custom fields, you can also personalize your account with custom calculations. This turns time-consuming tasks—like tracking probation dates or adding up bonuses—into a simple automated process.

BambooHR can create the following calculation fields:

- Currency
- Dates
- Numbers



## Custom Field Translation

BambooHR is designed to be an inclusive platform for all. To make sure everyone in your organization has easy access, you can translate any of the custom fields you create into your employees' preferred languages.

BambooHR currently supports:

- English
- Español (Latin America)
- Deutsch (German)
- Français (Canadian)
- 日本語 (Japanese)
- Português (Brazil)
- 普通话 (Mandarin Chinese)
- Nederlands (Dutch)

## Required and Optional Fields

While you love to get to know your people, not every data field needs to be mandatory. Control which fields are required or optional to fill out, letting you be more hands-on with the employee user experience in BambooHR.

## Custom Data Tables

Like fields, you can customize tables to display the key data you need. When creating a custom data table, you have two types to choose from:

- **Standard Data Table:** Track and organize important sets of information, such as employee skills.
- **Historical Data Table:** Track data over time, such as expense reimbursements.

## Table Sum Feature

Let BambooHR do the math for you with the table sum feature. Automatically add totals within your custom tables—ideal for adding up expenses, training hours, or any other numbers you need to keep an eye on.

## Table Average Feature

If you need a custom table that gives you a quick overview of a data trend, you can use the table average feature. The table will automatically calculate average values, making it easy to stay up to date on any key percentages, currencies, or numbers.

## Add a Custom Tab

While BambooHR comes with a large selection of tabs you can add directly to your account, if you have a more individualized need, you can request custom tabs. Within custom tabs, you can house custom fields and tables, creating a wholly unique organizational system for your company.



## Email Alerts

Custom email alerts make it easy to send employees reminders to update information or follow-up on time-sensitive tasks.

With a custom email alert, you're able to name the event, set the time and date, write the subject line and message, and choose the recipients. You can create custom email alerts based on a few different field types.

- **Date Field:** Create an alert based on any date field.
- **Table Date Field:** Create an alert based on a date within a table.
- **Visa Renewal:** Create a special email alert for an employee's Visa renewal deadline.

## Customize and Manage File Folders

Maintaining an organized system for documents is essential to running an efficient HR team. BambooHR keeps things simple with easy-to-manage folders you can quickly create, rename, and rearrange based on your current filing needs.

## Custom Reports

In BambooHR, you have access to over **40 standard reports.** But if you need to get even more specific, generating a custom report is quick and simple. You can choose all the fields you want to include, as well as select specially calculated fields that pull partial information or combine data from multiple fields (such as employee age or length of service). Design your custom report to present the precise data you need by filtering, sorting, and grouping the results.

## Compliance Made Easy

CTI, Inc. struggled to manage complex and ever-changing compliance needs. Now, thanks to custom tabs and fields in BambooHR, meeting compliance standards is a centralized, stress-free process.



“BambooHR made it easy to be in **compliance with evolving workforce legislation.**”

Josh Franklin | HR Program Manager | CTI, Inc.



# Approvals

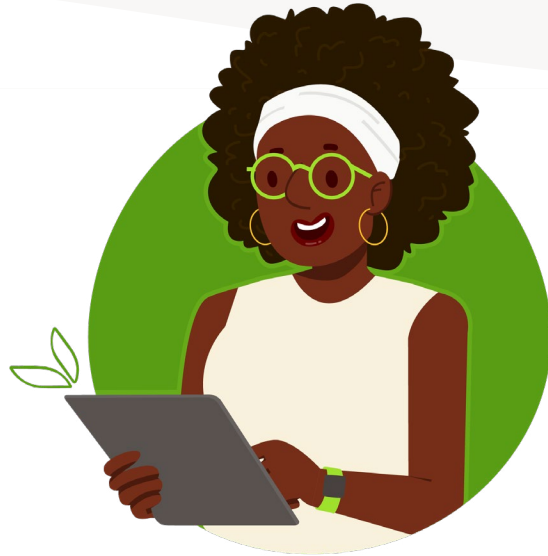
Overseeing **approval processes** is an important day-to-day responsibility for HR teams. With custom approval forms and advanced workflows, you can ensure that every approval process is seamlessly managed through BambooHR.

## Custom Approval Forms

You can set up custom approval processes to go along with any of your custom fields or tables. For example, if you have a custom “Bonus” field, you may wish to create a custom approval process for requesting and approving bonuses.

Here are some examples of ways you can customize your approval forms:

- Name the approval process and write a description.
- Add custom fields.
- Mark fields as mandatory or optional.
- Select who can request the approval.
- Select who can approve requests.



## Advanced Approvals

Not everyone in your organization follows the same workflow for approvals. To accommodate this, you can divert employees' approval paths based on several factors, including:

- Division
- Department
- Location

With each approval path, you can define who makes requests and who has the power to approve them, allowing for workflows that reflect everyone's particular department or office location's processes.



# Access Levels

An HRIS holds a lot of sensitive data, making it imperative to control access among users. If you have groups with specific access needs, BambooHR has you covered. **Access levels** ensure all employees can navigate BambooHR efficiently, accessing everything they need—and nothing they shouldn't.

You can make custom access levels highly specific, narrowing access down to discrete functions within BambooHR. For instance, a custom access level might enable select users to add or terminate employees, but not allow them to perform any other employee profile actions.

## Employees

Control how much access a user has to employee profiles. You can create a custom access level with permission to perform some or all of the following actions:

- Add new employees and rehire terminated employees.
- Terminate employees.
- Power-edit employees (update multiple employee profiles at once).
- Change employee photos.
- Manage time off policy assignments.
- Download employee forms.

## Hiring

Decide what someone can do within the Applicant Tracking System. These settings are particularly useful when creating a custom access level for hiring managers. Options for hiring actions include:

- Manage job openings and candidates.
- Send and manage offer letters.

## Time Tracking

Decide what someone can do within the Applicant Tracking System. These settings are particularly useful when creating a custom access level for hiring managers. Options for hiring actions include:

- Manage job openings and candidates.
- Send and manage offer letters.

## Reports

Give select users extra flexibility with creating custom reports. Employees with this access level setting will be able to generate new custom reports based on any of the fields and employee information they are allowed to view.

## Company Files

Empower employees with administrative responsibilities by giving them direct access to managing files. Decide whether or not a custom access level can do the following:

- Upload files.
- Request e-signatures and set up templates.
- Access company files.

## Settings

To create an access level that gives users greater administrative control without making them full admins, you can adjust access levels for account settings. Custom access options for settings include:

- Managing employee access levels
- Resetting passwords
- Setting up and managing approvals
- Benefits administration
- Company field settings (edit fields such as job title, department, etc.)
- Managing company holidays
- Setting up and modifying email alerts
- Customizing candidate status list and email templates in hiring
- Changing logo & color
- Editing offboarding template
- Editing onboarding template
- Creating, editing, and deleting performance review cycles
- Accessing time tracking settings
- Setting up and managing time off categories and policies
- Setting up and managing training requirements
- Setting language translations for custom tabs and fields
- Creating and removing webhooks

## Viewing Permissions

Each custom access level can have its own viewing permissions. Control what user groups can see on their own profiles, other employee profiles, and the BambooHR homepage.

## Access Levels Save Everyone Time

LionHeart Critical Power Specialists used to struggle coordinating manager approvals and other HR processes. Since switching to BambooHR, custom access levels empower employees to handle their administrative tasks independently.



“I love being able to set up permissions for certain people to be able to pull reports and things. The IT guy can get certain information. [Our] legal counsel has access to certain information. The owners have information they can get to. You don’t have to wait for me to answer your question. **So it’s setting people free.**”

Amy Boston | Employee Success Manager  
LionHeart Critical Power Specialists

# Display



Customizing displays within BambooHR is easy. Whether you're adjusting the color and design for the whole company or arranging widgets on your individual account, you can make BambooHR truly your own.

## Logo & Color

Make your BambooHR account feel like home by uploading your company logo and choosing from over 40 color scheme options. Your logo will appear next to the administrative tabs within your BambooHR account and on your external-facing careers website.

## Color Code and Add Icons to Time Off Categories

Keep your Who's Out calendar and Time Off Schedule report organized exactly how you like them by choosing color codes and icons for each time off category. Customizing the color codes and icons for time off ensures your internal brand stays consistent and gives your people a coherent shorthand for time off planning.

## Insights Dashboard

Individuals with administrative access can customize their Insights Dashboard to include the information and reports they care about most, such as benefit enrollments, time off requests, or employee age distribution.

# Hiring, Onboarding & Offboarding



BambooHR allows you to effortlessly manage all your hiring, onboarding, and offboarding needs. From posting job openings posts to coordinating first-day onboarding, it's all streamlined in one simple system.

## Custom Candidate Statuses

Not every industry or company has an identical hiring process, and your HRIS should accommodate that. With BambooHR, you can create custom candidate statuses to maintain an organized hiring system that accurately reflects your workflow.

You can add specific interview steps to the status dropdown list, such as:

- Job talks for academic faculty
- Skill assessments, such as auditions for professional dancers
- Certification checks for construction workers
- Hospital tours for doctors

These custom steps will appear in the status dropdown list, allowing hiring managers to have an accurate record of where candidates are in the process.

## Custom Application Questions

Job application questions don't have to be generic. In **BambooHR® Applicant Tracking**, you can write custom questions for job applications. Choose from several question-and-answer formats, including:

- Short open response
- Long open response
- Yes/no answer
- Multiple choice
- Checkbox
- File upload

BambooHR saves your custom questions, so when it's time to post a new job opening, you can immediately add your go-to custom questions without any extra effort.

## Applicant Tracking System Integrations

If you already have an applicant tracking system you'd like to keep using, BambooHR has your back. Get the best of both worlds by syncing BambooHR with your favorite ATS—you'll use all the systems you love without having to juggle data between them.

Here are some of the popular ATS options available through [BambooHR® Marketplace](#):



LEVER

greenhouse

breezy

workable

“The ATS side of the software really helps us to **reduce the barriers to hiring**. It makes it **very easy and very seamless for candidates** to apply, say, via Indeed or any other job board.”

Laila Bashia | Director of Human Resources | Schaumburg Park District





## Hiring Assessment Integrations

Trying to get a deeper look into candidates? With several integration options from popular assessment platforms, you can assess candidates in areas such as aptitude, skills, and personality, and have the results automatically added to BambooHR.

Current options for assessment apps include:

- [Criteria Corp](#)
- [iMocha](#)
- [Self Management Group](#)
- [Qualified](#)

## Background Check Integrations

Don't let complicated background check processes slow down your hiring process. With several leading background check programs available in the BambooHR Marketplace, your potential hires can navigate the process with efficiency and confidence.

Popular choices for background checks include:

- [Backgrounds Online](#)
- [Checkr](#)
- [Universal Background Screening](#)

## New-Hire Welcome Packets

Save time during **onboarding** by creating your own packet template for new hires. When creating a new hire packet template in BambooHR, you can add in any important first-day information and a set of "get to know you" questions.

To further personalize the onboarding experience, you can use the answers in the new hire packets to automatically send out an introduction email to employees, so they can welcome their new team member.

## IT Onboarding with Blissfully

If your organization has a lot of SaaS apps in use, BambooHR makes it easy to keep track of them, thanks to an integration with Blissfully.

Start the onboarding process in BambooHR and **Blissfully** will automatically generate the list of apps the new employee will need along with who's responsible for giving them access. That means your new hires won't need to go on a scavenger hunt for their work apps and can hit the ground running!



# Time Tracking

In BambooHR, you can manage pay rates and time sheets exactly how you need. With easy pay rate customizations and ample time tracking integrations, BambooHR serves as your personalized **time tracking hub**.

## Multiple Project Pay Rates

If your employees work at several different pay rates—such as a restaurant employee working as both a host and a server, or a nonprofit employee working on projects funded by separate grants—you need an HRIS that can handle multiple rates.

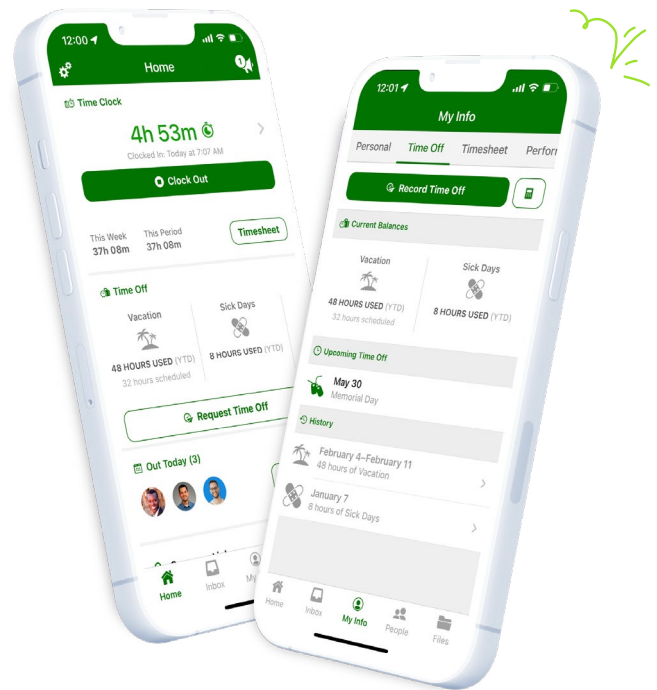
With BambooHR, managing pay rates is a breeze, allowing you to add all the project pay rates you need to employee records and time tracking.

## Time Tracking and Scheduling Integrations

BambooHR is here to work for you, which means that in addition to BambooHR® Time Tracking, you can also integrate your current preferred time tracking and scheduling platforms.

Some of the time tracking integrations available in BambooHR Marketplace include:

- [Deputy](#)
- [Humanity Scheduling](#)
- [TimeWorksPlus Powered by SwipeClock](#)



### Free Download: Is Your Time Tracking Solution Holding You Back?

When it comes to time tracking, little hassles add up to heaps of lost time and productivity. Check these warning signs against your current process to see if you should make the case for switching to a better solution.

[GET THE GUIDE](#) →



# Total Compensation

When it comes to total compensation policies, there's no one-size-fits-all solution. That's why BambooHR offers a broad range of customizations and app integrations for managing benefits and compensation packages.

## Job Levels and Pay Bands

Keeping paycales transparent, consistent, and clear is essential to retaining employees and supporting a healthy company culture. Customized job level and pay band settings help make that happen.

In the compensation settings in BambooHR, create job levels (e.g., junior, mid, senior) to reflect each department's structure. Then, add pay bands for each level, including the minimum, mid-point, and maximum salaries.

Alternatively, you can simply set a salary range. If you choose, you can also make job levels and pay bands visible within employee profiles, so each employee can understand how their salary fits into the company's pay structure.

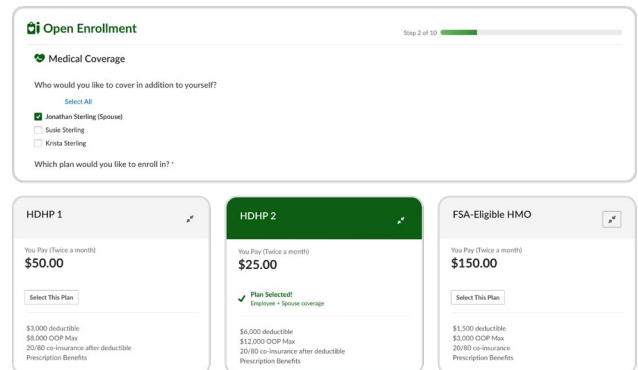
## Time Off Policies

In BambooHR, you can create as many accrual time off policies as you need. Under Time Off Settings, create customized time off policies, add new categories of time off, define tenure milestones, and assign employees to particular policies.

As your time off policies evolve, you can review the policy edit history, giving insight into how policies have changed and how it may have affected employees.

## Compensation Strategy with Payscale

Looking to give your compensation strategy a boost? Automatically sync your data in BambooHR with **Payscale** to start making data-driven decisions around compensation. Learn how to create more equitable compensation practices and start planning for the future.



## Benefits Administration Integrations

Keep your benefits administration running smoothly by using your preferred platform. Dive in with **BambooHR® Benefits Administration**, or easily integrate the system with whatever benefits admin service you like.

Here are some preferred benefits administration apps in BambooHR Marketplace:

- **Ease**
- **Maxwell Health**
- **PlanSource**



# Payroll

Get the custom data, reports, and integrations you need to become a payroll rockstar. From managing pay rates to easy file feeds, BambooHR ensures your **payroll process** is simple and accurate.

**Project Pay Rates**

Start Date	End Date	Pay Rate	Project or Task Name
• Hospice Care			
01/05/2024		\$19.25/Hour	Hospice Care
• Lab Tech			
06/04/2021		\$32.75/Hour	Lab Tech
08/23/2020	06/03/2021	\$31.50/Hour	Lab Tech



## Custom Pay Cycle File Feeds

**BambooHR® Payroll** also makes it easy to get your data directly to your vendors. With custom pay cycle file feeds, BambooHR will automatically and securely send your payroll data to 401(k), workers compensation, HSA, and FSA vendors.

## Multiple Pay Rates in Payroll

As with time tracking, you can customize your payroll to support employees with multiple pay rates. Using project pay rates, you can ensure your people are being accurately compensated for their multiple roles and projects.

## Custom Payroll Cycle Data Reports

Make communications with your essential vendors seamless by using custom payroll cycle data reports. Available for 401(k), workers compensation, HSA, and FSA data, these reports pull your payroll data and format it to meet your vendor's needs.

## Payroll Integrations

If you need to sync your existing payroll platform or add an international payroll service, BambooHR is here for you. Some of the popular payroll integrations in BambooHR Marketplace include:

- **Deel**
- **Papaya Global**
- **Pento**
- **Remote**

And if your preferred payroll app isn't already in the BambooHR Marketplace, you can easily sync your systems using **Flexspring**, an integration service that ensures your data can flow seamlessly from BambooHR into your payroll.



# Performance Management & Development

Getting performance management right is no simple task. BambooHR empowers you to create personalized, flexible review processes that give your employees the feedback and support they need.

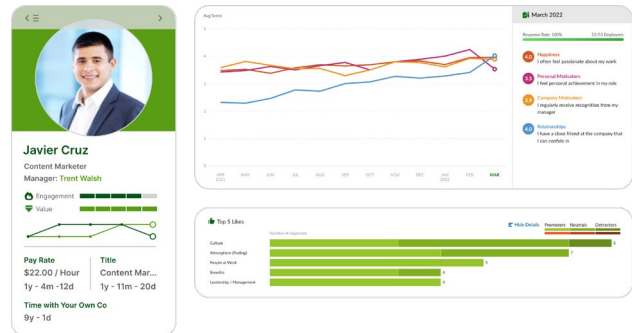
## Performance Review Cycles

Ditch the standardized annual review and start personalizing your performance review cycles. Choose the review cadence, which employees should be included, and whether to use feedback or assessments.

## Custom Feedback and Assessment Questions

Get the precise performance feedback you want with custom questions for both feedback and assessment forms. You can write your own questions and have the option to remove default questions. On assessments, you can also add questions with custom rating scales.

**Note:** Removing default questions in [BambooHR® Performance Management](#) disables certain standard reports that track employee-manager alignment.



## Performance Management Integrations

Performance management processes can vary based on your industry, organization size, and company culture. With that in mind, BambooHR empowers you to integrate the performance management software that meets your particular needs.

Options include:

- [15Five](#)
- [Lattice](#)
- [Small Improvements](#)
- [Leapsome](#)
- [PerformYard](#)
- [Primologik](#)



## Learning & Training Integrations

Level up your training and employee enrichment by connecting your learning programs to BambooHR, allowing your data to update automatically. Popular preferred apps include:

- [TalentLMS](#)
- [Litmos](#)
- [Absorb](#)
- [Northpass](#)

## Streamlined, Impactful Performance Management

Community Counseling Center was bogged down with arduous annual performance reviews that took too long and offered little room for impactful feedback. With custom performance management in BambooHR, CCC has the time to hold simplified, personalized reviews that lead to meaningful conversations and employee growth.



“I’d recommend Performance Management for its **ease of use, additional customizability, and the reporting features available.** It also promotes transparent conversations between employees and supervisors.”

Jacob Alsup | Director of Recruiting and Hiring  
Community Counseling Center

# Engagement & Culture



Engagement strategy is personal to your company culture, and your engagement tools should be, too.

## Employee Satisfaction Report Custom Tags

**Employee Satisfaction survey** responses are automatically assigned tags based on a pre-built topic list, but you can also create your own custom tags for topics that are more specific to your organization.

For instance, if you want to track feedback about a new vacation policy, you could add the tag “vacation policy” and apply it to the relevant comments.

## Engagement Integrations

Use BambooHR to fully capitalize on your favorite engagement tools. Sync your employee data, keep your systems running cohesively, and build your company culture. Preferred engagement apps in the BambooHR Marketplace include:

- [15Five Engagement](#)
- [Culture Amp](#)
- [Lattice Engagement](#)
- [Leapsome Engagement](#)
- [Officevibe](#)

## Recognition & Rewards Integrations

Make sure your employees feel recognized with a rewards program. Introduce a new rewards system or build engagement in your current program by automatically syncing it with your BambooHR account. Below are a few popular rewards apps in the BambooHR Marketplace.

- [Assembly](#)
- [Bonusly](#)
- [Gifted](#)

### Free Download: 10 Tips for Improving Company Culture

Strong company culture is the key to a successful business! Download our guide for expert tips on creating an amazing workplace culture that boosts productivity and attracts top talent.

[DOWNLOAD NOW](#) →



# Additional Integrations

## Integration Platforms

Can't find the integration you're looking for? Don't sweat it! [BambooHR Marketplace](#) features several integration platforms that enable you to connect BambooHR with any app you need.

Here are some preferred integration apps:

- [Merge](#)
- [Zapier](#)

## Identity Management

Keep employee logins secure and simple with identity management apps. Below are some popular apps that you can integrate with BambooHR.

- [Google Single Sign-on](#)
- [JumpCloud](#)
- [Okta](#)
- [OneLogin](#)
- [SAML](#)

## Communication with Slack

The [BambooHR app for Slack](#) makes it even easier for employees to stay connected, cross-posting information like time off requests, See Who's Out calendar, manager approvals, and Employee Community announcements.

## Planning & Charting

Enhance your process planning and org charts by integrating your planning apps with BambooHR and automatically updating your people data in real time. Preferred charting apps include:

- [Lucidchart](#)
- [Pingboard](#)

## Business Management with Netsuite

Connect your business management processes to BambooHR. [Netsuite](#) covers major management needs like finances, inventory, CRM, and more.

## Travel Management

If you have employees that travel frequently, simplify the travel planning and expense process by integrating a travel app with BambooHR. Sync employee data, coordinate travel, and track expenses. Travel integrations in the BambooHR Marketplace include:

- [TravelPerk](#)
- [Rydo](#)

### See BambooHR in Action

Learn more about all the ways BambooHR fits your needs!

[SCHEDULE A DEMO](#) →