Software Features

Features List

Time-saving HR software for small businesses

Our HR software streamlines the way you work and brings all your people paperwork together in one place to speed up time-consuming HR admin.

Streamline Staff Onboarding

Manage and monitor new starter checklists from one place.

Holiday & Absence Planner

Ditch the spreadsheets and switch to our holiday & absence planner.

Handy Reminders

Get handy reminders and warnings of all key dates and important messages.

Health & Safety

All health and safety information in one place, with reminders for equipment checks plus digital visitor and incident books.

Monitor Training

Log and track training and CPD.

Easy Expenses

Take the time and stress out of managing expenses.

Manage Appraisals & Goals

End-to-end online appraisal process for employee & line manager.

Painless Payroll

All the info payroll needs is in one place, up to date and ready to be exported to their payroll provider.

HR Reports

Find the information you want instantly - view online or export it as a CSV.

Online Timesheets

Track time and allocate time to projects using our online timesheets. Calculates wages instantly for hourly paid staff.

eSignatures

Send and sign employment contracts directly through the system.

Your Secure Employee Database

Swap spreadsheets for a secure cloud-based platform & absence planner.

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HR made refreshingly simple

Software Features

General Features

Employee Database

The system is built upon an employee database that stores everything associated with the employee. At the touch of a button, you will be able to access your staff's current and past job history, their employment contract, their holidays and absences, their remuneration details, their appraisals, training and performance reviews and their time- tracking and expenses.

Staff Handbook

This section of the software allows you to save your staff handbook documents so that your staff can have easy and quick access to them. You can also store your company vision, mission and values here, as well as other more informal information such as social events or good places for staff to go have lunch locally.

Holiday and Absence Management

This part of the system is designed to show you where your staff are at all times. You will be able to see who is off sick, who is on holiday and who is working from home on any given day of the week.

Reminders and Warnings

Our software reminds you of key dates such as birthdays, end of probation periods, end of the first two years' employment, imminent work permit or practising certificate expiry. You will also get a notification if any member of staff is currently earning below National Minimum Wage or Living Wage - which can easily happen when a younger member of staff has a birthday.

Reports

Our software offers one-click access to commonly used reports such as the Payroll report and the Employee Snapshot report. You can also create your own reports that can be viewed on screen, or as a PDF or .CSV file.

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Appraisals

Our online appraisal system manages the appraisal process for you. It reminds both the manager and the employee when the appraisal is due and then reminds them to complete the appraisal forms ahead of the scheduled appraisal date. You can customise the questions to suit your business and view reports to compare employee performance or performance over time.

One-to-ones

The one-to-one feature enables you to plan, record and track one-to-one appointments for your team, and you can both provide some notes for discussion. Notes can be added at any point before, during or after the meeting. All notes can be seen by both managers and employees and is a great way to manage regular employee performance.

Health and Safety

Our software stores details of all key Health & Safety roles for each location that you have and sends warnings out if any of these role-holders are due to leave so that the Health and Safety role can be replaced in time. Additionally, all of your staff can use the system to see who the H&S officers are and find out where the First Aid kit is located.

Time Tracking and Billing

You can record the time you work on a project or activity by using the built-in stopwatch feature and then allocate that period to a project or client or activity. This allows you to easily see how much time has been spent on a different client work or project work and by whom.

Alternatively, for those that work Rota/Shift or flexible hours, they will have access to a basic timesheet where they can record the hours that they work per week, which can then be submitted for approval at the end of the working week.

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Staff Expenses

Our expenses system lets your staff quickly and easily fill in an expense claim with any relevant pictures of receipts to a project/client or code from any device. You can then approve or reject the expenses online and a record of the expense claim is filed away.

You can also manage benefits such as company cars and pension from the system.

Mobile Ready

Our software is built to work well on mobile devices whether it's a tablet or a smartphone, so you and your staff can use all of the software features anywhere, anytime.

Job Offers

The software can generate offer letters and reference requests, allowing you to easily manage the whole job offer for a perspective employee through the system.

A link can also be sent to the new employee for them to fill in their personal details allowing you to easily complete their employment file on the account, making the recruitment process simple and smooth.

New Starter Checklist

To make it easier when onboarding a new starter, we have created a timely checklist to help you organise new employees and make sure that you tick everything off your to- do list as they move forward in their new role.

Our checklist covers everything you need for a new starter, from before they start to their first day, with regular check-ins including their first month and first year to make sure you are on track.

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Probation Periods

Our software has an in-built probation setting where you can set up the probation length for your company and how many meetings you wish to have during that time. You can also decide whether you wish to use the online probation form which will enable you to complete the whole process through the system.

There is also the option to set up reminders in about probation to ensure that the meetings are completed on time. Meeting dates and probation information for each employee are stored in individual profiles and can be updated during probation, making it simple and easy to monitor.

Bulk Import

When you first use citrus HR you to easily import all your important employee data like job title and contract type into the system using just one simple form.

Once uploaded if you want to make any changes to your employee's data or payroll information, you don't have to do this individually, you can now upload one spreadsheet with all the changes and preview them before it's processed.

This tool will allow you to save time inputting your employee information.

Two Factor Authentication

Our system offers two forms of 2 factor authentication – SMS and app based.

Both work in a similar way where you use a code verified by a either SMS or an app to access the system – like with online banking.

Using this as well as your user accounts makes breaking into the system almost impossible for hackers.

Software Features

General Features

'How To' Videos and Guides

There are a lot of features in the system and to help navigate some of the most used features, you can find how to videos in the Help section. This includes how to add a new member of staff onto the system, how to add to and use the staff handbook, and much more.

Staff Satisfaction Survey

Our software allows you to send out satisfaction surveys to employees asking them how they feel about the workplace. This can be sent on a weekly, monthly, and quarterly basis. Reminders will be sent through the system to remind employees to complete the survey, there is also the option for the responses to be anonymous which will help create an environment for more honest feedback.

You can see all the responses in our staff survey report, which includes any comments from your team - and also a Net Satisfaction Score. If you want to view satisfaction trends over time at a glance our staff survey trend report can summarise multiple surveys for you.

The system can also send one off surveys with your own custom questions like "should we get an office dog?" or "how do you feel about working to the office?" to help you stay even more engaged with your teams – especially with those working remotely.

When your replies start coming in, you'll be able to see a report of the responses making it quick and easy to see your employee's comments.

Hybrid Working and Desk Booking Tool

Our hybrid working functionality allows you to set where people will be working, and when, or offers the flexibility for a flexible schedule.

 The desk booking on the system means that you can set workplace capacities, enable your employees to book a desk in the office, and use the filters below to check where there are spaces and see who else has booked for that day.

Software Features

Payroll Features (optional extra)

Payroll Software

citrus HR can run your payroll stress-free and in less time than it takes to make a cup of your favourite coffee.

We have tools to help stop errors before they happen, automatically send secure online payslips, and generate your payroll journal in seconds, meaning that you can effortlessly keep payroll & HR records in sync.

Xero and QuickBooks Online Integrations

Our software has seamless integration with Xero and QuickBooks Online to help you synchronise your payroll and make the payroll process quicker each month, saving you time.

PensionSync Integration

Our integration with PensionSync means you can submit pension information and payments directly to providers, via the citrus HR payroll software. Popular providers included in this integration are:

- ✔ Aviva
- ✔ Nest
- ✔ Legal & General
- ✔ NOW:Pensions
- ✔ Smart Pension, and
- ✔ The People's Pension

Comma Integration

From payslip to payment with the click of a button. Our Comma integration means you can use open banking to pay your people, directly from the payroll screen. No more keying in information!

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